

**Section 1: Community or constituency(ies) to be served by the organization**

Since 1969, Somerville Community Corporation (SCC) has served the City of Somerville and its residents. SCC focuses all of its resources on the central question of sustaining affordability and livability for the lower income two thirds of the population, including immigrant communities both new and established.

Somerville is a diverse and divided city of 85,000 residents. An upwardly mobile gentrifying community occupies the Western districts of the city. A significant percentage of its population with incomes below AMI lives primarily in the Eastern half. The highest income census tract has a household average of \$138,000 in West Somerville, compared to the lowest income census tract with an average of \$47,000. Historically, Somerville had been home to low income and working class immigrant families, mostly from Ireland, Italy, Greece, Portugal and the Portuguese Azores. While Somerville suffered from disinvestment and physical deterioration that most urban core cities suffered, owners and renters had no issue affording housing due to the stable housing stock. Unfortunately, the beginning of the 1980 saw a change in these markets which coincided with the opening of the MBTA Red Line extension from Harvard Square, Cambridge through Porter and Davis Squares to Alewife. Somerville's housing market and demographics changed rapidly and severely.

By the early 2000s, European immigrants and their descendants, who had previously comprised over 90 percent of Somerville's population, had been reduced to approximately one-third of the city's population. The other two-thirds of Somerville's emerging new population fell into two distinct cohorts: (1) "Gentry" – mostly middle and upper class, well educated, white residents (2) Recent immigrants – but this time mostly people of color coming from Central and South America, the Caribbean, South Asia and Africa, generally with much lower incomes, language barriers, and in some cases, lower levels of education. Furthermore, the gentry has found residence overwhelmingly in the Western part of Somerville, while the newer immigrants have found homes in the Eastern half.

American Community Surveys data show that 43% of Somerville residents are classified as cost burdened, as they pay more than 35% of their income on housing (1/6 of the population is considered severely cost burdened, paying over 50% of their income on housing). 10.5% of all residents live below the federal poverty level. A 2017 RKG study in Somerville reports there has been a steady 10.4% annual growth rate of housing costs between 2010 and 2016. The average rent in 2015 - \$1,696- would require a household income of \$67,840 to afford. According to the 2017 Nexus study, 20.2% of the Somerville labor force and 43% of unemployed workers have a high school education or less.

Despite these barriers and market pressures, important factors motivate people to stay in or move to Somerville, despite their economic standing: Sanctuary City status, providing safe harbor to immigrant residents; public amenities, such as good schools, public transportation, and a breadth of social services; social support networks for families; and a growing economic base. Somerville saw a 24.5% increase in jobs between 2010 and 2015, compared to a 12.2% growth in the Metro North region.

This bifurcation extends into other social indicators as well. Somerville's population is 31% people of color, compared to 25% regionally, and 26.8% of the population is foreign born. In the schools, 51% of the students speak a language other than English at home, compared to 16.7% state wide. Immigrants earn 29.8% less than native born residents. The high school dropout rate is 18.6% in Somerville, compared to 8.2% statewide. At the same time, 52% of Somerville's workforce has a bachelor's degree or higher. 34% of the workforce has a high school degree or less, and are nearly twice as likely (13% vs. 5-8%) to be unemployed than those with a bachelor's degree or higher. In summary, Somerville's diverse population reflects two ends of a workforce spectrum, with low income and immigrant workers either under-employed, or working in low paying jobs, while a significant portion of the population is highly educated and eligible for higher paid positions.

The City of Somerville faces unprecedented transformation in the next 2 decades, which presents potential opportunity to Somerville's residents if managed well. In 2012, the City adopted its comprehensive SomerVision plan, which is currently being updated. This plan forecasted a growth by 2030 that would bring 30,000 new jobs, 6000 new housing units (1200 of them permanently affordable), and 125 new acres of publicly available open space. The Metropolitan Area Planning Council projects 74% job growth in Somerville, compared to 8% growth in the region. Planners also anticipate 10 million square feet of new commercial and residential development. The \$2.3 Billion Green Line Extension will add 4 light rail stations in Somerville and 2 stations on the city's border.

While SCC aims to benefit the entire community through its community development model, its most important work connects directly with the members of the community most at risk of displacement resulting from climbing market pressures. SCC works with community members and partners to address today's critical issues of equity in the face of the tremendous transformation across a city- and a region. SCC board, staff, and overall membership have vigilantly concentrated their work to counteract market-driven displacement pressures. As a result of the seismic changes described above and in anticipation of continuing transformation, SCC adheres to the following intended impact statement, adopted by the SCC Board in 2008:

***Building community power and organizational resources so that low- and moderate-income people and new immigrants continue to have the opportunity to reside in, be full participants and become leaders in the Somerville community.***

## **Section 2: Involvement of community residents and stakeholders**

SCC is a membership-based organization with over 1800 members and constituents. While we are proud of our membership base, it is the level of activity and commitment for which we carry the most pride. Since 2001, SCC has strongly rooted itself in grassroots community **organizing** practice. This resulted in a number of successful campaigns to influence affordable housing policy and bring about neighborhood quality of life improvements. Since 2005, SCC has built a strong practice of participatory community **planning**, beginning with our East Somerville Initiative. This continued with the Community Corridor Planning project along the pathway of the anticipated MBTA Green Line Extension. Over the last 5 years, SCC has extended this practice to help resident influence development in the eastern portion of Union Square, and recently worked with a coalition of community partners to establish and gain commitment of a Community Benefits Agreement with the master developer in Union Square, resulting in a \$4 million commitment from the developer to priorities requested by the community. We are currently working with our partners in the redesign of the 5.5-acre Clarendon public housing site, as well as extending our work in the eastern half of the city to establish community development standards in an area designated as an Opportunity Zone.

As a result of community organizing and planning work, SCC enjoys a robust membership, which participates across a range of issue-based committees, community planning steering committees, and neighborhood land use planning groups. SCC's annual meetings routinely draw approximately 250 members. Its annual summer member meeting gathers together approximately 100 members to participate in a range of workshops and whole group sessions. A base of 60 active leaders participate on a regular basis in core committees and actions, and SCC has the capacity to quickly mobilize 75-100 members on important issues in Somerville. For example, in late 2015, 100 residents attended a public hearing on the proposed increase in Inclusionary Housing, with over 30 testifying in favor.

In 2008 SCC launched the Leadership Development Institute, an intensive 4 half-day training program for 20 emerging community leaders. Each year since, the program has trained 20-25 new leaders. In addition, each year SCC sponsors 4-5 one-time leadership development workshops on topics ranging from public speaking to understanding economic injustice. Several years ago SCC developed a model connecting clients from economic opportunity programs to SCC's organizing and leadership building work. This model has remained and expanded to include the First Source jobs program. Additionally, SCC leads the region in conducting simultaneous interpretation in 4 languages (Spanish, Portuguese, Haitian Kreyol and English). This model allows every participant to speak in their first language by wearing headsets equipped to translate.

Leadership development drives much of SCC's work, and is critical to successfully preventing displacement in Somerville. Our approach is creative and we implement a variety of strategies to inspire people to engage with our work. The first step involves crossing barriers to reach people who usually do not or cannot get involved through door knocking and personal one to one visits. Staff, interns and volunteers make an effort to match visits by language. All meetings provide child-care, food, and language interpretation, ideally simultaneous. SCC's culture

emphasizes the importance of building relationships between members, and encourages people to share their personal stories.

Change requires more than simply engage people to participate; SCC's goal is to support the city's most disenfranchised residents to become leaders who shape and guide their equity agenda. These leaders emerge from those who become active on issues committees and campaigns (jobs, housing, and Union United). The organizing and planning team works with these emerging leaders to stretch beyond their comfort zone and develop new skills. These skills include making public testimony, turning out people to events, engaging in power analyses, analyzing relevant data, contacting public officials, and creating actions to move an agenda forward. As leaders become stronger, they take on organizational roles of leadership, such as becoming a co-chair of a committee, joining SCC Board of Directors, or teaching leadership skills in workshops and trainings.

The net result of SCC's consistent focus on membership and leadership has paid off, as it doesn't have to look far when seeking active input to establish the key goals of SCC's strategic plan. Furthermore, SCC extends this participatory and relational model to a wide range of stakeholder groups. As an actively collaborative organization, SCC enjoys the participation and support from a wide range of partner stakeholder organizations, ranging from local organizations such as the Somerville Homeless Coalition, the Somerville Center for Adult Learning Experience (SCALE), and Groundwork Somerville (among others), to regional organizations such as the Metropolitan Area Planning Council (MAPC), Mass. Smart Growth Alliance and Career Place and Career Source, the Metro North region's two career centers.

Other areas of SCC's work, including our Economic Opportunity programming, similarly follow a relational model of building leadership, self-sufficiency, and strong social networks connecting program participants, staff, employers, trainers, and peers.

### **Sections 3, 4 and 5: Plan goals, priorities, activities, and measures of success**

Somerville Community Corporation recently completed a five year strategic plan to cover the period between 2019 and 2023. The goals included in this CIP reflect the current strategic plan, with modified projected outcomes for the next 5 years.

The City of Somerville is undergoing tremendous transformation (as described in Section 1). SCC's overarching goal is to contribute to and influence this transformation to leave intact Somerville's socio-economically diverse population. We are eager to work with our constituents, the City of Somerville, and other partners and allies to solve the underlying public policy question: can a city undergo significant land use and economic transformation, with the infusion of billions of dollars of public and private investment, in a way that benefits people of all incomes without leading to a demographic shift that hurts low income families? SCC's core work, as defined through its current Strategic Plan, sets out to find positive solutions to this question.

SCC has identified the following major themes in its strategic goals for the coming five years:

- Preserve and enhance diversity in Somerville, both ethnic and economic
- Integrate empowerment into every community interaction, including membership recruitment, interactions with tenants of SCC properties, and SCC's own governance
- Consider Somerville as part of a broader ecosystem
  - Creating greater economic and housing opportunities for people who live and work in Somerville may involve expanding the geographic range of our activities
- Embrace intentionality in decision-making about organizational policies and development
  - Resolve conflicts that arise in our work in a structured and decisive way; clearly communicate the resolution and its rationale
  - Make decisions about organizational priorities and growth based on resources

**SCC Vision:** Somerville is a racially, ethnically and economically diverse community. People from across the economic spectrum find opportunities here: to live in stable and affordable housing, to work in decent jobs with fair wages, and to take on leadership in shaping the community's future.

While our core work remains in Somerville, we understand that Somerville's housing and employment needs and opportunities are closely linked with those of surrounding communities. Any geographic expansion we undertake will be mission- and outcomes-driven.

SCC will work toward this vision:

- By increasing the supply of affordable housing across the city through direct development and by advocating for public policies that support affordability and stability in the housing market;
- By expanding employment programs that connect workers to good jobs, advocating for employment standards and public policies that support the creation of good jobs;
- By building the leadership of residents across the city, and helping to raise the voice of immigrants and other underrepresented constituencies; and
- By growing SCC itself – through partnerships and relationship-building, intergenerational membership growth, program development, and organizational financial strength.

### **SCC Values and Guiding Principles:**

- *Diversity and inclusivity:* We are committed to making our community and our own work open and accessible across economic, cultural and linguistic barriers
- *Empowerment:* We support self-determination; we work to develop leadership in under-represented communities; and we seek to create a place where all voices can be heard

- *Participation:* We believe in democratic decision-making; and we work to find commonality among stakeholders
- *Justice and equity:* We pay particular attention to the voices of the marginalized; and we work to offer opportunities to all
- *Community:* We work to create safe, inclusive places for people to live and work
- *Compassion:* We are motivated by caring for the well-being of all in our community
- *Persistence:* We are ambitious in our goals and tenacious in their pursuit

**Priority #1: Expand the development and preservation of high-quality affordable multifamily housing.**

SCC strives to enable residents of diverse backgrounds to live and thrive in Somerville. SCC's efforts to develop and preserve affordable housing in Somerville directly contributes to this goal, particularly in an atmosphere of rapidly rising housing prices that impacts a wide range of Somerville residents, from the very lowest income to middle income households.

To the extent that real estate development and ownership can be profitable activities, the funds earned from this business line can help support the agency's other goals. As development and acquisition opportunities arise, SCC will prioritize projects with the goal of maximizing positive community impact from the limited pool of public and private resources.

**Goal #1: Create and preserve housing that is affordable to low, moderate and middle income households within Somerville and neighboring communities, encompassing a range of housing types for families and individuals, including seniors, and targeting diverse populations.**

1. *Prioritize development of new subsidized, affordable multifamily housing in Somerville at the greatest scale/volume possible (given resource and opportunity constraints).*

Measures of Success

- Two projects of at least 25 units each in the pipeline at all times, in different stages of development, at least one of which is inside Somerville
2. *Develop affordable multifamily housing in neighboring communities, where it enables SCC to expand scale / impact and fees to support the organization.*

Measures of Success

- At least one project of at least 25 units outside of Somerville added to the pipeline over the strategic plan period which generates significant fee income to support SCC programs, including pursuing other affordable housing opportunities
3. *Build housing of the highest quality*
- Measures of Success
- New projects are built to high standards of energy efficiency, and have adequate funding to provide services to residents

**Goal #2: Prevent displacement of at least 150 existing resident households in Somerville.**

1. *Build on and expand “100 Homes” scattered-site acquisition program in Somerville.*

Measures of Success

- Purchase 200 scattered-site units over next five years

2. *Investigate other opportunities to purchase buildings or otherwise preserve housing for current Somerville residents.*

Measures of Success

- Preserve at least 150 tenancies over the strategic plan period

**Goal #3: Engage in asset management activities to keep the properties in excellent condition and to maximize their financial benefits for SCC.**

1. *Ensure that the properties are charging appropriate rents and pursuing collections.*

Measures of Success

- Properties are maintained in excellent condition
- Modest and predictable rent increases are implemented annually

2. *Refinance properties where possible to capture equity for SCC and/or improve SCC fees / cash flow.*

Measures of Success

- Two to three property refinance efforts are initiated (Linden, Walnut, and Polycarp are potential candidates)

3. *Build SCC’s asset management function.*

Measures of Success

- Asset management performance measures dashboard is created and in use
- Maximized mission and financial contributions of the SCC portfolio

**Goal #4: Connect residents of SCC-owned properties with the full range of SCC activities and resources in order to create communities and better engage residents.**

1. *Develop outreach program to inform existing residents of SCC programs, to facilitate access to those programs, and to engage them as members and leaders.*

Measures of Success

- 50 SCC tenants enrolled in SCC programs per year
- Resident services programs initiated at SCC properties

2. *Engage SCC residents in community-building efforts and in organizing.*

Measures of Success

- 20 SCC tenants participating in SCC community organizing efforts
- Growing sense of community and ownership at SCC properties
- SCC tenants become leaders and members engaged in campaigns

- Improved resident satisfaction over time as evidenced through survey results

**Priority #2: Organize in the community to promote equitable policies and develop leaders who have the power to impact the future of Somerville.**

Organizing and leadership development have been, and will continue to be, core to SCC's identity. We are widely seen as a leader among CDCs that engage in authentic community organizing. Our organizing work has enabled SCC to establish policies in Somerville that have had broad impact on affordability and equity, carrying an impact beyond what we can do directly through our projects and programs.

Central to our vision of a diverse community is that we support immigrants and other under-served populations to find their voices, and that Somerville has a growing pipeline of leaders who can work together for political impact. This is an organization-wide priority that requires the commitment of staff, board, and financial resources.

**Goal #1: Increase the number and capacity of members and leaders who have a prominent voice in public policy and in community affairs in Somerville, especially those who have historically been under-represented (working class, people of color, and immigrants).**

*1. Re-dedicate SCC to developing a robust membership base.*

Measures of Success

- Strategy for supporting membership development is completed within the first year of the Plan including delineated goals and objectives for membership

*2. Increase the membership base through a consistent process across the organization.*

Measures of Success

- Cross-organizational collaboration to sign-up members
- Establish a quantitative target for membership recruitment in the course of the first year's membership plan development
- Subset of total members who are very active
- Achieve the numbers of members established for each target constituency and set goals for the total number of members who are very active

*3. Organize the Leadership Development Institute (LDI) to train new leaders.*

Measures of Success

- 10 of the 20 graduates in each cohort reach 2 leadership milestones per year
- 14 of 20 graduates in each cohort engage in a campaign per year
- Track activity of graduates in subsequent years

*4. Organize advanced leadership workshops and explore the potential to develop an LDI level 2 - advanced training for a cohort of leaders tied to action as a means to build bench strength and a deeper peer to peer exchange*

#### Measures of Success

- 7 of 15 graduates of workshops reach 2 leadership milestones in year 1
- 9 of 15 graduates of workshops engage in a community organizing or issue campaign in YR 1
- Determine if an advanced level training cohort is feasible by the end of YR 1 and then set measures of success for subsequent years

5. *Help SCC leaders participate in broader coalitions, both locally and beyond, that promote a more equitable Somerville*

#### Measures of Success

- 30 leaders joining coalitions, engaging in public policy campaigns per year

### **Goal #2: Organize for policies and resources that prevent displacement and enhance economic, racial, and ethnic diversity in Somerville.**

1. *Organize and promote a policy and regulatory environment in Somerville that fosters housing creation and preservation, including both resource creation and regulatory relief for affordable housing.*

#### Measures of Success

- Transfer fee measure is passed and generates a fund of \$5M/year
- Legislation preventing displacement such as the Tenant Right to Purchase passes
- SCC collaborates with tenants to purchase at least one property in the coming five years

2. *Organize to increase number of jobs with livable wages.*

#### Measures of Success

- At least 5 employers are certified to meet the “good jobs” standards in the 2<sup>nd</sup> year of the plan
- At least \$1 Million raised for WFD/ job training
- Benefits accrued from partnerships
- Outcomes pertaining to the Somerville Jobs Trust

3. *Advocate for city-wide approach to Community Benefits Agreements (CBAs) and equitable development*

#### Measures of Success

- CBAs result in at least two new community benefits, or increases in the amount of existing City-required benefits
- Enact at least one new City policy resulting from a CBA-gained new or increased benefit

### **Priority #3: Advance economic opportunity in Somerville and in neighboring communities.**

Our Economic Opportunity model focuses on a spectrum of services—from financial literacy, to home ownership support, to job preparation to help people get into career growth employment—to holistically support Somerville residents to achieve financial stability and personal economic growth. Using a relational approach, all participants quickly fit into a bigger system of change. Through our model, participants build connections with peers through cohort programs, workshops, and leadership development, and become connected to a web of resources that moves people along a path from stabilization to career growth. We believe strongly that when program participants have second and third “touches” with SCC and our programs their chances of success increase significantly. The relational approach further connects other players in the system, including employers, lenders and coaches—as well as program participants—so that everyone is invested in the collective success of this model.

#### **Goal #1: Increase economic self-sufficiency for low and moderate income Somerville residents and others in neighboring communities.**

##### *1. Refine and strengthen SCC’s Financial Literacy program.*

###### Measures of Success

- Written pre-and-post evaluations show increased participant confidence with self-advocacy and education regarding financial decision-making
- At least 50% of the 40 program participants will use follow-up counseling services available to improve credit and/or budgeting issues
- At least 50% of the 40 program participants will show increased efforts to save and/or improvements of 25+ points in their credit scores within 6 months

##### *2. Refine and strengthen First Source program*

###### Measures of Success

- 180 individual participants per year; 12 job readiness workshops per year; 1-2 job fairs per year
- 12 new employers become FS employer partners per year by provide point of contact and agree to review referred job applicants)
- Metrics are established and used to evaluate and improve the program
- Build, test, and refine job readiness measurement tool and set program goal for change in job readiness within first year
- 50% job placement rate with at least 40% retaining job for at least 90 days
- 80% of participants who obtain employment increase their wages compared to baseline wage at intake if employed, or compared to most recent wage if unemployed at intake, with at least a third of those who are placed earning at least \$15/hour, adjusted annually

##### *3. Develop and expand sector cohort model for First Source*

###### Measures of Success

- 2 cohorts in first year with at least 12 participants per cohort

- Develop strong partnerships with at least 2 training partners and at least 3 employers for cohort programming
  - Half of all cohort participants increase their job readiness score by at least 3 points
  - 50% job placement rate, with at least 40% of those placed retaining their jobs for at least 90 days
  - 80% of participants who obtain employment increase their wages compared to baseline wage at intake if employed, or compared to most recent wage if unemployed at intake, with at least a third of those who are placed earning at least \$15/hour, adjusted annually
4. *Increase the number of Economic Opportunity program participants who have a “second touch” with SCC, either by participating in a different EO program or by and becoming active in SCC’s Committee and Policy Campaign work.*

Measures of Success

- At least 30 EO program participants per year have a “second touch” with SCC, including at least 10 homeownership program participants
5. *Expand the reach of SCC’s Economic Opportunity programs.*

Measures of Success

- At least one city in addition to Somerville with an active program, including outreach and classroom materials and speakers and trained facilitators
- 30 people served per year from other communities

**Goal #2: Promote, expand, and explore other wealth-building strategies for Somerville residents and others in neighboring communities.**

1. *Expand the number of Somerville residents who are qualified to buy homes and who are able to buy homes in Somerville.*

Measures of Success

- Status update information gathered from at least 100 FTHB graduates per year
  - At least 25 FTHB graduates per year purchase homes, with at least 5 of those purchasing homes in Somerville
2. *Assess the feasibility of providing program and advocacy support for locally-owned small businesses to survive and thrive in Somerville; if feasible for SCC, determine appropriate timing for research and potential implementation, including*

Measures of Success

- Plan and timeframe for research developed by YR2; if determined feasible, implementation begins by Year 3

**Goal #3: Promote a system approach to ensure that the Somerville employment economy is one where everyone is thriving.**

1. *Increase the number of employers who are champions for good jobs standards and are working with SCC and others on an anti-displacement agenda.*

Measures of Success

- Vet and establish good jobs standards and system for certifying employers who agree to adhere to those standards
- Employer advisory committee established with 3-5 employers recruited year 1, increased annually to 20+ total
- Established partnership with funder, and worker support fund established with \$20,000 raised by Year 2
- The numbers of employers certified as adhering to Good Jobs standards increases
- The number and percentage of First Source participants hired into positions with certified Good Jobs employers increases

2. *Work to meet the workforce needs of low and moderate income residents, including immigrant households, by advocating for increased commitment by the City of Somerville and the regional workforce infrastructure to supporting a robust delivery system.*

Measures of Success

- City budget for workforce development increases to at least \$100,000 annually
- At least \$100,000/year of Jobs Linkage allocations fund FS program work
- First Source is involved in at least one project per year with 3-5 Somerville workforce development partners

**Priority #4: Ensure that SCC is a strong, nimble, and sustainable organization with the funding, infrastructure and capacities to reach our vision.**

SCC can only achieve its program goals from a position of organizational strength. It is our goal to become the strongest organization we can in order to do our work as effectively as possible: to develop the infrastructure and financial resources that will facilitate our work in the community, to establish clear and effective processes for communications and decision-making, and to empower our board and staff to be effective leaders.

**Goal #1: Strengthen SCC's governance structure and capacity.**

SCC is a diverse organization with leaders who have diverse opinions and backgrounds. Members are passionate about the work and often want to dig right into the details. To reinforce an effective structure, everyone needs to be clear about their roles and have the capacity to contribute to the fullest extent possible.

1. *Clarify SCC's governance structure and processes, and create consistent methods for supporting effective governance.*
2. *Build the capacity of Board members to fulfill their roles in governance and strengthen Board member engagement.*
3. *Strengthen Board functions.*

### Measures of Success

- The Board includes members with a greater diversity of opinions and perspectives
- New members report they see opportunities for engagement and have the tools/ information/ comfort level to fully participate and attendance records demonstrate more people are participating in meetings
- Materials are distributed in advance, to allow discussion topics to focus on policy/ key decision making topics
- More key decisions are made in a timely manner

### **Goal #2: Support an effective and efficient decision-making process throughout SCC.**

SCC benefits from engaging a wide diversity of voices at all levels of our organization; this commitment to diversity can, at times, make it challenging to establish a clear, consistent SCC voice that conveys a unified message. We want to balance inclusivity and organization-wide deliberation.

1. *Institute a practice of using a standardized discussion guide/ decision-making template that supports effective decision making at all levels in the organization.*
2. *Ensure that all parties involved in discussion/ decision making (staff, committee, board members) have timely and easy access to the information they need for effective decision making and the preparation time they need for thoughtful deliberation In addition, establish a process by which SCC-involved individuals (members, committee members, staff, board) should make the distinction of advocating as individuals rather than on behalf of SCC.*

### Measures of Success

- Decision making template is created and used regularly by staff, board, and committees
- Technology to improve easy access to materials is implemented and used widely
- Increase in the numbers and percentages of staff, board members, and committee members who are active in participating in key decisions
- System is used to effectively resolve at least two major decisions in the first year of the plan

### **Goal #3: Ensure that SCC has the financial resources to reach its goals.**

Financial strength is key to SCC's ability to pursue its goals. We need the funds to hire staff to pursue all of our strategic priorities; we need balance sheet strength to pursue real estate development and other opportunities as they arise.

1. *Strengthen SCC's ability to earn revenues from operating activities*
2. *Build SCC's fundraising capacity*
3. *Explore other new sources of capital and revenue*

4. *Build SCC's Balance Sheet*

5. *Institute timely and transparent processes for budgeting and financial review*

6. *Rebuild the Board's Finance Committee to ensure responsible financial governance*

**Measures of Success**

- SCC establishes a real estate development reserve of \$500,000 which is capitalized and maintained
- SCC builds and maintains an operating reserve of 3 months of expenses, available at all times
- Annual budgets are completed in a timely and transparent manner, before the end of each fiscal year, with
- Board and Staff actively participating in informed financial decision-making
- Finance Committee functions with at least 4 active members

**Goal #4: Communicate with a clear, unified voice to effectively tell our story.**

How SCC communicates, both internally and externally is important for successfully conveying the messages we want to convey to a variety of audiences.

1. *Develop communications protocols for all staff and Board members to follow. In the short run those protocols should assume the absence of a single staff position devoted to communications work.*
2. *Increase capacity to hire communications person, either combined with resource development, or stand alone, and consider internships and other volunteer support needed.*
3. *Complete a communications plan and strategy, coinciding with bringing on the new staff position including software, website improvements, staff training, and social media presence.*

**Measures of Success**

- Communications plan and strategy in place by the end of Year 1

**Goal #5: Create personnel and organizational development plans and policies that ensure strong staffing at all levels.**

1. *Expand staffing to the level required to fully implement the goals of this Strategic Plan*
2. *Create agency-wide plans for staff training, development and retention.*
3. *Develop succession plans for the senior leadership team that ensure strong and stable leadership for SCC.*
4. *Continue to monitor the environment for opportunities to collaborate and engage with other community development nonprofits in the area.*

### Measures of Success

- All programs are fully-staffed to achieve the goals in this plan
- SCC develops skilled community development professionals to serve both the organization and the broader CDC community
- SCC retains and promotes talented staff
- SCC successfully navigates Executive Director transition, achieves stability and longevity of its senior leadership team, and maintains a strong Board of Directors
- SCC responds to opportunities for organizational collaboration that can benefit the organization and its mission

### **Goal #6: Ensure SCC has the infrastructure and systems for efficient and effective operations.**

1. *Establish and institutionalize protocol for systems and operations to ensure coherent, cohesive systems of operations that are shared among staff, board, interns and members over time.*

### **Section 6: Collaborative efforts to support implementation**

SCC has a deserved reputation as a collaborative organization, as well as a leader of collaborative efforts in the community. As an organization we work hard to (a) find those areas related to our Intended Impact of combating displacement pressures and working to sustain a vibrant, economically diverse community where SCC can play a unique role that is not otherwise better. The areas of (1) affordable housing development and policy; (2) financial asset building for low income households; (3) advocating for jobs and access to jobs for low and moderate income people; and (4) advocating for equitable outcomes in all physical and economic development, programs and policies in Somerville, and (5) grassroots organizing, participatory planning, and leadership development are the five areas where SCC plays a singular and leading role in the community.

SCC's clarity about our own appropriate role(s) in the community helps us to form, lead, and participate in a range of collaborative efforts where the collaborators share a common goal and can divide up roles appropriately. For example, SCC served as the lead organization for the Great Neighborhoods Initiative in Somerville from 2011-2014, a program of the Mass. Smart Growth Alliance. SCC led, convened and served as fiscal conduit for that collaborative, but Groundwork Somerville, the Somerville Transportation Equity Partnership, Somerville Health Agenda, and Friends of the Community Path all played vital roles in the overall Initiative. SCC continues to convene and partner with those same organizations today. Similarly, SCC has played a leadership role in convening partnerships along the workforce continuum with SCALE, the City of Somerville, employers, and trainers. SCC's model is to connect our participants of our Economic Opportunity programming (First Source Jobs and Asset Building) to both the internal programs we offer, as well as to partnering organizations who can provide specific services and training to help our members grow their skills holistically as they advance along the career pathway and by building financial stability.

SCC has and continues to participate in numerous city and regional committees, including the Mayor's Sustainable Neighborhoods Task Force; the Mayor's Jobs Task Force; the Community Preservation Selection Committee; the Somerville Community Land Trust Committee; MassHire Board of Directors; MassHire Career Pathway Task Force; MACDC Board of Directors; Mel King Institute Steering Committee; Tufts University, College Board; Tufts University partnerships with Tisch College and Urban and Environmental Studies; Casino Action Network; Action for Regional Equity; Metropolitan Area Planning Council—various committees; Mass Community Bankers; and Raise Up Massachusetts.

## **Section 7: Integration of activities/consistency with community strategy and vision**

Through a range of coalitions and networks, SCC consistently seeks to establish and proceed based upon a collective vision of making sure Somerville grows and thrives in a way that is consistent with community values of environmental justice, diversity, affordability, access to good jobs, transportation, and open space. That emphasis has been evident in partnership efforts over the years ranging from the Community Corridor Planning Coalition to the Great Neighborhoods Initiative to the current work of Union United as it evolves into community planning in one of Somerville's designated Opportunity Zones.

Internally, we work hard to integrate the various arms of our organization, so that members can benefit from the synergies of working across departments and programs. For example, our organizing team and leaders regularly provide workshops to program participants in the First Source Jobs program. Participants who participate in our Economic Opportunity programming are invited to enroll in our 4 session Leadership Development Institute; and conversely, LDI participants are encouraged to take advantage of our various programs, such as financial literacy, First Source Jobs, etc. We also encourage tenants of SCC properties to participate in all of the above, and conversely, refer our participants to get onto waiting lists for our affordable housing.

Finally, in multiple ways, SCC board members, members and staff participate in and integrate with the City of Somerville's efforts to develop and promote a community-wide vision and establishment of specific policies and programs. Through our organizing work, our active members significantly influenced the passage of signature City initiatives, including Inclusionary Zoning, Community Benefits Agreement Ordinance; creation of the Union Square Neighborhood Council; Jobs Linkage Fee; increase of Housing Linkage Fee; Community Preservation Act; and the recent CBA with US2—all of which have added millions of dollars to supporting affordable housing and access to job training for Somerville's residents.

## **Section 8: Financing strategy**

SCC seeks a mix of revenues to support its annual and ongoing operations. Our mix of funding support includes (a) private grants; (b) earned income, principally from real estate development

and asset management fees; (c) public contracts and grants supporting a range of SCC service programs; and (d) corporate and individual contributions.

SCC projects monthly cash flow going out at least one additional fiscal year, and closely monitors progress against those cash flow projections. SCC aims to dedicate 10% of earned developers fee into agency reserves, as first decided by the Board of Directors in 2008. As a result of careful budgeting and cash flow projections SCC has been able to adjust staffing levels as needed – while such decisions are difficult, staffing up at levels SCC can afford has been a critical component of SCC’s financial stability. SCC continues to hold an operating line of credit from Rockland Trust, as well as a working capital line from Mass. Housing Partnership and has maintained both in good standing. Finally, we have also steadily improved our tracking mechanisms for grant and donor fundraising, as well as for contract monitoring.

Having secured stable funding streams in our other revenue lines, SCC set out in 2014 to grow our donor development operation, taking advantage of the then-new Community Investment Tax Credit in the process. Prior to 2014, SCC had averaged \$40-50,000 annually in donor contributions. In 2014, the first year of CITC, we increased our donor fundraising to \$125,000. In 2015, that total reached \$225,000 and in 2016 we raised \$386,000, utilizing not only our \$150,000 in 2016 CITC credits, but also more than half the carryover CITC credits from 2014-2015.

Our financial strategy for 2020-2022 includes four significant components: (1) following a period of challenges in acquiring new real estate for sizeable new affordable housing development, SCC is now poised to complete acquisition and development on two parcels in Union Square, one on Alewife Brook Parkway, and the Clarendon public housing redevelopment project; (2) continue to grow our Economic Opportunity work, especially the First Source programs, with public contracts and private foundation grants; (3) Raise \$1 Million in 2019 and 2020 on SCC’s 50<sup>th</sup> anniversary, including \$400,000 each year utilizing our CITC allocation; and (4) continue to grow our donor fundraising capacity to fully utilize available CITC credits as those allowable allocations grow to \$250,000 and \$300,000 per year.

## **Section 9: History, track record and Sustainable Development**

Founded in 1969, Somerville Community Corporation is a membership organization with a mission to develop and preserve affordable housing, offer services and programs, and build a collective voice through community organizing and planning to realize a stable, diverse, and affordable community. In its 50 year history, SCC has completed over 20 affordable housing projects, resulting in more than 100 ownership units and 264 rental units, as well as acquiring over 50 units of housing to preserve as affordable through the 100 Homes program. We soon add 11 more units of new construction (8 of which will be affordable) to Glen Street this year, and are actively working with POAH and Redgate Development to redevelop the Clarendon Hill property, a 539 unit project, of which 286 will be affordable. We help over 400 people annually gain economic stability through the mediation programs, financial literacy classes, First Time

Homebuyer classes, and the First Source Jobs program. We have mobilized hundreds of residents to win organizing campaigns around affordable housing, jobs, and neighborhood equity, winning signature campaigns including passing the Community Preservation Act; preserving expiring use buildings; winning increases to Inclusionary Zoning to 20%; increasing the Housing Linkage Fee to \$10.00 per square foot; and supporting the creation of the Jobs Linkage Fee at \$2.46 per square foot..

SCC, as well as the City of Somerville overall, is strongly committed to the Commonwealth's Sustainable Development Principles, and works to put those Principles into action. As described in this proposal, virtually everything SCC does is wrapped around the central question of equitable sharing of benefits and burdens of development in our community. SCC has been leading, and will continue to lead the call for housing and jobs to reach all segments of the socio-economic spectrum so that low and moderate income residents can share equally in the benefits of new transit, substantial job creation, and housing opportunities in our vibrant urban community.

With the Green Line Extension coming to Somerville, along with large scale new development at Assembly Square, Inner Belt/Brick Bottom, Union Square and Boynton Yards, it is imperative that we seek equitable outcomes for all residents with respect to housing opportunities, transportation choice, job and small business opportunities, and other community amenities, such as new public open space.

SCC is at the forefront of promoting Inclusionary Housing requirements and Linkage Fees as ways to promote the creation and sustaining of more affordable housing. In 2015-16 we led an effort that resulted in the Board of Aldermen adopting a Zoning Ordinance change increasing the City's Inclusionary Housing requirement from 12.5% affordable to 20%. We have also been leading the effort to give Somerville residents the first and real opportunity to access the thousands of new jobs being created in Somerville, in part resulting in the new Jobs Linkage ordinance passed at the end of 2017. Where there are gaps in providing affordable housing or in connecting local residents to job opportunities, SCC seeks to fill those gaps as the City's premiere affordable housing developer and by partnering to provide a job readiness and training service stream.

SCC's real estate development serves as a model for green, energy and water-efficient development. Our Saint Polycarp Village development features a passive green roof on the Phase 1 building – the first in Somerville – as well as solar thermal and solar photovoltaic panels in each of the three phases. In addition, we also implemented a comprehensive storm water management plan on the entire three acre site. Most recently, our project at 181 Washington Street stands out as a signature effort to incorporate sustainable development principles. We are also committed to conducting energy retrofits of our 100 Homes properties.