



**South Middlesex Opportunity Council Inc.
Community Investment Plan (CIP) 2024 – 2026**

SECTION 1: COMMUNITIES TO BE SERVED BY THE ORGANIZATION

Founded in 1965 in Framingham, Massachusetts (MA) SMOC is a nonprofit corporation with a 501(C)(3) federal tax designation; a federally designated Community Action Agency (CAA) for the MetroWest and Blackstone Valley regions; a statewide provider of low-income housing; a Community Housing Development Organization (CHDO); a Regional Administrative Agency (RAA); a part of the Regional Housing Network (RHN) and, a certified Ch.40H statewide Community Development Corporation (CDC). SMOC administers over 60 major programs through a diverse and dedicated staff of 766 human service workers (628 FT and 138 PT) and 68 volunteers and college interns. SMOC's FY24 projected budget is \$172,726,100.

SMOC's mission is to improve equity, wellness, and quality of life for diverse individuals and families by providing advocacy, education, and a wide range of services; building a community of support and inclusion; and creating awareness to combat poverty through partnerships and coalitions with other organizations. Central to our mission is working with individuals and families to maximize self-sufficiency and economic independence, especially for the most vulnerable in our society.

As a CAA, SMOC provides social services support and subsidized housing programs to low-income individuals and families. These programs include Head Start and Childcare, Home Energy Assistance Program, HEARTWAP, First-Time Home Buyer, Rental Assistance, Individual and Family Shelter and Housing, HiSET, ESL, Workforce Development, Microloan Fund, WIC Nutrition Services, Behavioral Health, Substance Use Disorder Residential Treatment, and Domestic Violence services.

SMOC's 2023 Executive Office of Housing & Livable Communities (EOHLC) CSBG Annual Report reports SMOC served 43,364 low-income individuals including 27,020 families. Program demographics: 41% Male, 55% Female, 4% Other/not reported. Race: 26% White, 13% Black/African American, 1% Asian, 5% Multi-Race, 18% Other; 43% Hispanic/Latino; 15% Disabled.

City/Town	2021 Population	Unemployment Rate	Poverty Rate	Median Income	Household
Ashland	18,646	4%	4.9%	\$115,959	
Bellingham	16,934	4.6%	3.7%	\$109,042	
Framingham	72,089	5.1%	10.5%	\$90,638	
Holliston	14,891	3.9%	3%	\$142,348	
Hopkinton	18,501	6.2%	2.4%	\$179,192	
Lowell	114,804	5.8%	17.5%	\$64,489	
Marlborough	41,505	5.4%	8.3%	\$86,230	
Natick	36,627	3.3%	4.3%	\$122,914	
Northbridge	16,291	6.5%	7%	\$97,206	
Southborough	10,380	3.1%	3.8%	\$170,223	
Springfield	155,770	9.6%	16.3%	\$43,308	
Waltham	64,655	2.4%	3.7%	\$203,789	



Wayland	13,859	3.5%	8.8%	\$103,498
Worcester	203,867	6.2%	19.3%	\$56,746
Total	800,840			
Massachusetts	6,991,852			

Sources: US Census Bureau ACS 5-year estimates, 2021

MetroWest and Blackstone Valley – Primary Service Area

SMOC's CSBG-designated service area reflects the 10 towns of its origin as a CAP Agency: Ashland, Bellingham, Framingham, Holliston, Hopkinton, Marlborough, Natick, Northbridge, Southborough, and Wayland. The total population is 259,722, of which 6.6% of the population is below poverty.

Framingham, where SMOC was founded and is headquartered, is a city with strong ethnic and racial diversity. The US 2021 Census American Community Survey indicates Framingham's race/ethnicity at 63.5% White (non-Hispanic), 6.5% Black, 8.8% Asian and 16.7% Hispanic. 21.6% of the population is foreign born. It is evident that most foreign-born residents within our service area want to make the United States their permanent home. A significant portion of them have taken the necessary action to become naturalized citizens. Notwithstanding that, they continue to speak their native language at home, most notably in Framingham. This community has the potential to benefit from ESL classes given the percentage of residents identified as speaking English less than "very well". Framingham is home to substantial and growing communities of Spanish- and Portuguese-speaking immigrants: Portuguese and Spanish make up 85% of non-English home languages. The poverty rate in Framingham is 10.5%. Framingham's median household income is \$90,638.

The high cost of living is a contributing factor for minimum wage workers being at-risk for homelessness or experiencing homelessness. The Area Median Income in the MetroWest area is \$97,700, which is 9% higher than it was in 2000. The median cost for rent in Framingham is \$2,300. Rent in Framingham is 15% higher than the national average.

Worcester County, Springfield (Western MA) and Lowell – Satellite Service Areas

As determined by SMOC's Community Services Block Grant Community Action Plan (CAP), SMOC's service area has expanded into other regions of need, with a "satellite" service area encompassing a variety of cities and towns throughout Central (Worcester), Western (Springfield), and Northeastern (Lowell) MA. These areas are served mainly with respect to housing and community and economic development activities. All three are Gateway Cities.

Economic Indicators within SMOC's Satellite Service Areas							
City	Population	Unemployment Rate	Poverty Rate	Median Income	Household	Median Rent	Monthly
Worcester	203,867	6.2%	19.3%	\$56,746		\$2,000	
Lowell	114,804	5.8%	17.5%	\$64,489		\$2,042	
Springfield	155,770	9.6%	16.3%	\$43,308		\$15,575	

Sources: US Census Bureau ACS 5-year Estimates, 2021

The Census indicates that all three cities reflect strong racial/ethnic diversity; Worcester's race/ethnicity is 64.7% White, 12.7% Black, 6.8% Asian and 23.9% Latino. Springfield's race/ethnicity is 52.9% White, 20.8% Black, 2.8%



Asian and 47.5% Hispanic. Lowell's race/ethnicity is 58.2% White, 9.0% Black, 22.2% Asian and 17.6% Hispanic.

SECTION 2: INVOLVEMENT OF COMMUNITY RESIDENTS & STAKEHOLDERS

SMOC was founded in 1965 through the efforts of community activists in the Town of Framingham under the Title II of the Economic Opportunity Act of 1964. Since its founding, SMOC operates and is governed through: 1) the direct involvement of residents in the communities that it serves; 2) as part of a consortium of local, regional, and statewide service providers with whom SMOC shares a common constituency of clients; and 3) engagement with municipal and statewide advocacy groups, planning commissions, and state and federal agencies charged to represent, fully or in part, the needs of diverse populations.

Essential to SMOC's planning, operations, effectiveness, and accountability is the involvement of a broad cross-section of the community in its governing, policy setting, decision-making, and accountability processes. SMOC's Board of Directors is composed of 21 members who bring tremendous diversity of experience to program and policy development and implementation. (Attachment A: SMOC Board List) One-third of the members are representatives of the low-income population who are the recipients of many of our services. Another third are public representatives recommended from SMOC's service communities. The remaining third are representatives of private business, philanthropic, faith-based, financial, advocacy, and other organizations such as the NAACP. This diversity is essential to ensure SMOC programs are sensitive and responsive to the basic human needs of its communities. Drawn from the ranks of public and private community leadership, Board members provide critically important input, advice, and direction to senior management, including direction regarding the goals, activities, and funding strategies outlined in this CIP. The Board meets monthly 10 months per year, with a summer recess.

To deliver culturally competent services, SMOC recruits and employs a diverse workforce that reflects our service population. SMOC's 2019 EEOC Report reports the makeup of SMOC's staff is 75% Female, 25% Male, 49% White, 11% African American, 2% Asian, 2% Multi-Race, and 36% Hispanic or Latino.

As a CAA, SMOC prioritizes, implements, and operates programs for low-income populations through the development of a three-year Community Assessment Report & Strategic Plan (CARSP). The CARSP is a requirement of the EOHLC Community Services Block Grant funding. This CIP, as well as our annual Statements of Progress, are based on stakeholder input, goal-setting processes, and program data from the CARSP reporting and planning processes. An internal kickoff meeting was held in October 2022 to officially begin the 2024 community needs assessment and strategic planning process. The Planning Guide developed by EOHLC (DHDC at the time) was reviewed in this initial meeting. Several staff members also attended DHCD's CARSP Kickoff Training Series in October 2022 organized for all the community action agencies. Data collection commenced in January 2023 and ended at the beginning of April 2023. In July 2023, SMOC submitted its finalized 2024-2026 CARSP to EOHLC. The Planning Committee meets on a monthly basis to review progress and the various deliverables.

The CAR portion of the the CARSP is the outcome of a comprehensive, collaborative, and inclusive process that engages an extensive and diverse array of stakeholders from within and outside the agency, the local communities that SMOC serves, and the state as a whole. Poverty is multidimensional and calls for a comprehensive, integrated, and holistic approach and solution for its ultimate eradication. Bringing stakeholders to the table and participating on boards at the municipal and state level is the most effective way to wage the War on Poverty, an area where SMOC has a demonstrated track record.

Based on the size of the population living below the poverty line in our CSBG service area, the ideal sample size for the CARs Community Needs and Customer Satisfaction Survey was calculated at 374, at a 95% confidence level.



The survey was designed in SurveyMonkey and, for the first time, quick response (QR) codes were generated and distributed, in addition to the regular web link, for ease of access. Links were posted on SMOC's website and social media platforms including Facebook, X/Twitter, and Instagram. Paper copies of the survey were also available for program staff to hand out to clients in MetroWest, Lowell, Worcester, and Springfield. Given the diverse client base SMOC serves, the survey was translated and made available in five languages; English, Spanish, Portuguese, Haitian Creole, and French. Data collection commenced in January 2023 and ended at the beginning of April 2023. Partner agencies that serve low-income populations were also engaged to administer the survey to their clients.

The Community Needs and Customer Satisfaction Survey collected information about demographics, housing, healthcare, COVID-19, food security, employment, transportation, income, debt, safety, childcare, social media, and use of and satisfaction with SMOC services. Similar to the last needs assessment, all Community Action Agencies were required to include a set of common questions to provide a statewide profile of community needs.

A Community Organizations Survey was also administered online through SurveyMonkey from January to April 2023. Over 100 organizations were contacted with contextual explanations and background to the CARSP and provided the link to the online survey. These included community and faith-based organizations, state and local government agencies, financial institutions, educational institutions, legislators, police departments, and health entities among others. Organizations were requested to describe the populations they serve, identify their geographical service area, and classify the nature of the services provided. Organizations were also asked to rank community needs in various sectors such as housing, healthcare, financial and economic concerns, childcare, nutrition, domestic violence, and transportation. Ranking ranged from 1-High to 5-Not Applicable. They were also required to identify other community needs and suggest strategies to avoid service duplication and enhance collaboration with SMOC.

To supplement data from these surveys, SMOC conducted four focus groups in March and April 2023 with clients in SMOC programs. Due to staff and time constraints, we selected programs located in Framingham: Co-Occurring Enhanced Women's Residential Dual Diagnosis Treatment Program; Anchored In Recovery Peer Support Recovery Center; a co-ed Supportive Housing Program; and Turning Point Emergency Shelter for single, unaccompanied men. The groups were conducted in English and facilitated by program staff. Discussions revolved around food, housing, employment/education, and transportation—issues which had surfaced from the Community Needs and Customer Satisfaction Survey—and community strengths/assets/resources. Data from focus groups held at SMOC's Framingham Community Center was also reviewed as part of the community needs assessment.

Based on the CARSP, an annual Community Action Plan (CAP) is developed and used to track progress toward the achievement of program goals and objectives outlined in the Strategic Plan, similar to how the Statement of Progress is developed. The ultimate goal of both SMOC's EOHLC Community Services Block Grant CAP and this CIP is to move underserved individuals and families toward greater economic and social self-sufficiency. In order to ensure monitoring for progress, outcome measurements are reviewed and evaluated every 6 months. Program managers review data such as housing placements, incident reports, and other key metrics monthly with their teams. This presents the opportunity for program revision and improvements to further enhance outcomes.

Every three years, the CARSP process is repeated in its entirety. This repeated cycle of community input and surveying provides information on current and emerging community needs and program usage. The CAP, CARSP, and CIP all require review and adoption by SMOC's Board. The Board makes final approval of all agency goals, priorities, and budgets, and ensures compliance with all grant conditions the agency receives. This CIP will come before SMOC's Board for a vote and adoption on February 20, 2024.



In addition to the community engagement efforts mentioned above, SMOC involves residents and stakeholders for input and guidance on SMOC's activities. Some examples follow:

- The Lowell Transitional Living Center (LTLC) and Open Pantry Community Services (OPCS) Advisory Committees: As affiliates of SMOC, LTLC and OPCS fall under the same Board leadership as the rest of the organization. Both programs maintain separate Advisory Committees made up of former clients, residents, and stakeholders from their communities. These Committees report to managers and to SMOC's Board to provide guidance on programmatic, fiscal, and administrative activities.
- Head Start Policy Council: Made up of Head Start parents and community members, the Head Start Policy Council meets monthly and is charged with providing oversight and management of the Head Start Program. The Council appoints one representative to serve on the SMOC Board.
- Peer Recovery Support Center: Offers participants (people in recovery from or affected by addiction) the opportunity to be involved in planning programs, groups, and resources needed to aid in their recovery.
- Housing Peer Support Model: SMOC's supportive housing model incorporates the Peer Support Model, whereby residents at each location meet monthly to discuss and shape their environment. Each property has a House Manager, who is a resident/service recipient in a leadership role, who in turn provides feedback to SMOC staff on residents' needs and concerns. This creates an ongoing dialogue between SMOC and its tenants allowing SMOC to incorporate tenant feedback into its activities.
- Client feedback: Focus Groups, Peer Groups, and Satisfaction Surveys are institutionalized in the development and review of all our programs. SMOC conducts Focus Groups to obtain feedback from program participants and stakeholders regarding program quality, process and performance.

SECTION 3: PLAN GOALS

Goal 1: Sustain and create more opportunities for underserved individuals and households to become self-sufficient and economically independent. Unemployment and poverty disproportionately affect minorities. In Massachusetts, the overall unemployment rate in 2022 was 4.1%, but the African American unemployment rate was 6.7% and the Hispanic rate 6.0%. Massachusetts's overall poverty rate for the year 2022 was 10.4%, but in the African American community it was 17.4% and in the Hispanic community it was 19.9%. **BENEFITS:** SMOC's employment readiness, training, job assistance, placement programs, and microloan services decrease community unemployment, grow jobs, expand local economies, and provide opportunities for employment for underserved populations. Program participants acquire skills to compete in the job market, acquire relevant education, become gainfully employed, and obtain and maintain safe, affordable housing.

Goal 2: Sustain and create more opportunities in which individuals and households who are low-income, historically underserved, and/or living with a disability benefit from improved living conditions. Affordable housing was the top need identified in SMOC's client and stakeholder interviews over the past year. The U.S. Department of Housing and Urban Development's (HUD) 2023 Point-in-Time (PIT) Count indicated there were 19,141 people in MA counted as homeless, with 1,607 in Worcester and 4,432 in Balance of State (which includes the MetroWest area and Lowell), where SMOC operates homeless shelters. In Framingham, 47% of all renters pay more than 30% of their income to rent, indicating cost burden. Sober and recovery-focused housing is very limited and the demand for it continues to increase, especially as detox facilities throughout the state face critical staffing shortages and do not have the personnel capacity to fill every bed. **BENEFITS:** SMOC seeks to decrease homelessness among individuals and families statewide through homeless prevention services, rapid rehousing and housing first programs, and by preserving affordable housing stock and developing new affordable housing for low-income populations, including those in recovery. Thus, homeless individuals and families will be housed within their communities and can focus on finding employment to support a permanent housing placement.



Goal 3: Sustain and create more opportunities for underserved and underrepresented individuals to own a stake in their communities. Low-income and newcomer populations are often excluded from the mainstream community, planning and government and from leadership positions. **BENEFITS:** When given the opportunity to participate, these populations are empowered, enhance self-sufficiency, and contribute to the development of their communities as productive community members. With SMOC services assisting low-income people to attain decent housing, livable wages, adult education, child and family development and more, these families and individuals become more engaged in their communities, have involvement with local school systems, become part of the area workforce and thus better integrate and become more ingrained in civic life and activities. In turn, this enhances the overall well-being of the community at large. SMOC also provides opportunities through client empowerment programs including participation on SMOC Board of Directors, Advisory Boards, and the Peer Support Model embedded in our programs.

Goal 4: Sustain and increase partnerships among service providers who support our shared communities. SMOC has built a comprehensive network of housing and support programs to meet the needs of low-income people. SMOC does so in partnership with community-based organizations; employers; private, for-profit companies; and federal, state, and local governments within the communities that we serve. **BENEFITS:** Strategically, this allows SMOC to leverage and link people to existing community services and then create new programs to fill gaps in those services to effectively address the needs of this target population, especially the homeless. This reduces duplication of services, decreases program operation costs, and strengthens the agency's fiscal capacity.

Goal 5: Sustain and increase SMOC's capacity to achieve results. As state and government funding contracts continue to face decreases, nonprofit organizations must operate efficiently, seek alternative sources of revenue, and—in many cases—affiliate to decrease overhead and continue to provide much-needed services to the community. **BENEFITS:** By implementing best practice accounting and systems management, SMOC demonstrates strong administration and programmatic goal attainment, enabling SMOC to continue receiving state and federal contracts. Efficient accounting, relevant training, and accurate reporting ensure public and private funds are spent with maximum public benefit. SMOC's administrative overhead returns 90% of revenue to community programs.

Goal 6: Sustain and create opportunities for low-income people to achieve their potential. The Council for Community and Economic Research consistently ranks the Greater Boston area among the top 10 most expensive urban areas, an indicator of the cost of living throughout the state. The median income in Middlesex County, which includes Framingham, is \$118,800, yet Massachusetts' minimum income is \$15, which annualizes to \$31,200 for a full-time job. **BENEFITS:** SMOC directly provides connections to public entitlements, private supports, emergency services, asset development, workforce development, and childcare programs to help low-income individuals and families stretch their budgets, weather financial crises, and retain and maintain stable housing, thus decreasing community issues of homelessness. Connecting individuals and families to Behavioral Health services provides the support and resources to help this population succeed at work and at home and decreases the cycle of poverty and domestic violence. SMOC serves as a one-stop shop in the communities it serves, enabling clients to access many needed resources under one roof with seamless referrals.

Goal 7: Sustain and create food security opportunities for low-income people. Food Insecurity continues to be a major challenge for low-income people in SMOC's service area. According to Project Bread, food insecurity rates have been inching closer to the high we saw at the onset of the pandemic. In fact, it is estimated that nearly one in five Massachusetts households experienced food insecurity in October 2023. In December 2023, the number of households and individuals receiving SNAP benefits was at an all-time high. Feedback from SMOC's community surveys indicates that access to SNAP benefits, and at a sufficient level to sustain the household, is a primary method



of improving food security. Local food pantries help alleviate food insecurity but can be difficult to access due to transportation or work schedules, and the quality and cultural appropriateness of food varies. **BENEFITS:** Food security is a basic human right; without sufficient food, children cannot learn and adults cannot work. Proper nutrition is critical for babies and young children and helps ensure they will develop into healthy, productive members of society. SMOC operates a variety of programs providing both short- and long-term solutions to food insecurity.

SECTION 4: ACTIVITIES TO BE UNDERTAKEN

SMOC achieves its goals through the implementation of a programs that are multidimensional and multi-sectoral. Through SMOC's current finance strategy and an allotment of CITC, SMOC seeks to maintain and expand its existing community and economic development programs and services. These programs and new projects are as follows, although existing programs are described by name alone, due to space limitations.

Goal 1: Sustain and create more opportunities for underserved individuals and households to become self-sufficient and economically independent. SMOC accomplishes this goal through the following existing programs: **Employment Programs:** Adult Basic Education (HiSET, ESL), Green Jobs Academy, Framingham CommUNITY Center, Secure Jobs Workforce Development program, and Volunteer Income Tax Assistance (VITA). **Microbusiness Development Services:** SMOC Financial Services.

New Projects Underway or Scheduled for Implementation:

- ESL/Citizenship Program: On January 22, 2024, SMOC's Framingham Community Center Director and Secure Jobs Program piloted a collaborative initiative to serve SMOC's shelter system residents, primarily our Haitian population. Shelter residents are transported to and from the FCC two to three times a week for two hours at a time. During these FCC visits, individuals use tablets to begin learning English independently. Once individuals pass Level 1 ESL, it is our goal to build upon the program and introduce a Citizenship Class component.

Goal 2: Sustain and create more opportunities in which individuals and households who are low-income, historically underserved, and/or living with a disability benefit from improved living conditions. SMOC accomplishes this goal through the following existing programs **Community Improvement and Revitalization Programs:** Shelter programs (Congregate and Scatter Site Family Shelters, Emergency Single Adult Shelters, Lowell Transitional Living Center/Emergency Shelter, Greater Worcester Housing Connection/Emergency Shelters), Housing Programs (Permanent Housing, Housing Consumer Education Center, Rental Assistance, HomeBASE, Recovery Housing, Housing for People With AIDS, Supportive Housing, HEARTWAP), Home Modification Loan Program, Family Self-Sufficiency Program, South Middlesex Non-Profit Housing Corporation), and Case Management and Recovery Programs (Anchored in Recovery Peer Support Recovery Center, Common Ground Resource Center, Open Door Social Services).

New Projects Underway or Scheduled for Implementation:

- Framingham Day Center: The Day Center opened in February 2023 to serve people who are unsheltered in the downtown Framingham area, especially those who may have behavioral and physical health needs. Individuals can access basic needs items, receive assistance from staff to make connections to medical and behavioral healthcare, enter into shelter, access substance use services, and receive referrals for work and housing.
- Medical Respite Pilot Program: In August 2023, SMOC, in partnership with UMass Memorial Medical Center (UMMMC), was awarded a contract to pilot a Medical Respite Program located at 237 Chandler Street in Worcester, MA. This pilot will address barriers individuals experiencing homelessness face to hospital discharge, including a lack of safe and appropriate community-based housing options where the individual can receive ongoing medical care and rehabilitative services that may be necessary to support their long-term health.



Housing Developments and Future Development Pipeline:

- 6 Wyman St., Worcester: (Completed) SMOC's rebuild of a multifamily building destroyed in a fire in 2020 was completed in January 2024 and provides 16 modular units of permanent supportive housing.
- 30 Winfield St., Worcester: (In process) SMOC is in the predevelopment phase of building a new, 18-unit, modular permanent supportive housing project. The project has development funding committed and is in the state's preclosing process.
- 237 Chandler St., Worcester - Respite: (In process - Under Construction) SMOC is renovating a section of the first floor of the existing building to add 7 medical respite beds for emergency room discharge in partnership with UMass Memorial Health. The project will be completed in February 2024.
- 237 Chandler St., Worcester - Shelter: (In process - Predevelopment) SMOC is in the predevelopment phase of renovating a portion of the second floor of the existing building to upgrade the existing 34-bed shelter area to add a larger women's bathroom facility, replace exterior windows, and repair flooring.
- 237 Chandler St., Worcester - PSH: (In process - Predevelopment) SMOC is in the predevelopment phase of renovating a portion of the second floor of the existing building to add 20 permanent supportive housing units, supportive services spaces, and a common lounge.
- Days Inn, Leominster: (In process - Predevelopment) SMOC is working to acquire a former Days Inn hotel building. Phase 1 of this project is to acquire the 101-room hotel for conversion to shelter use. Phase 2 of the project is to convert 40 of the rooms to permanent supportive housing units.

SMOC Housing Portfolio:

In 1986, SMOC created a wholly owned subsidiary, the South Middlesex Non-Profit Housing Corporation (Housing Corporation), to respond to the local and statewide crisis of affordable housing. SMOC's Housing Corporation has created a unique and successful approach to serving the needs of low-income households by integrating case management and SMOC's wraparound services and community-based support services with housing units, with the goal of tenants sustaining stable housing that supports self-sufficiency. SMOC's real estate holdings comprise 128 buildings of permanent affordable housing, group residences, emergency housing/shelters, service-enriched housing, and offices/commercial space in 26 communities. SMOC owns and manages 1,750 low-income housing units. In the past three years, we have developed 89 new units of housing. Listed above, SMOC is currently working on projects that will result in the production of 76 new units of housing and the preservation of 47 units. (Attachment B, Summary of SMOC's Real Estate Portfolio)

is also committed to preserving its existing housing stock by investing in capital repairs that improve their comfort, efficiency, sustainability, and "curb appeal." SMOC created a master list of capital repairs in early FY20. To address these needs and take advantage of favorable financing, SMOC closed on a tax-exempt bond through MassDevelopment in September 2020, refinancing an existing portfolio loan (25 properties) along with other mission-core buildings in the MetroWest and Worcester areas. This established a new capital repair reserve fund in excess of \$5,000,000 and included 46 properties. Additional refinancing packages closed in FY21, making available a further \$3.4M. These funds allow SMOC to invest in our buildings by providing new roofs, windows, appliances, mechanical equipment, and other capital items.

Goal 3: Sustain and create more opportunities for underserved and underrepresented individuals to own a stake in their communities. SMOC accomplishes this goal through these existing **Client Empowerment Programs:** SMOC Board of Directors, Head Start Advisory Board, Peer Support Housing Model, Lowell Transitional Living Center Advisory Board, Springfield Open Pantry Community Services Advisory Board, and Peer Recovery Support Center.



New Projects Underway or Scheduled for Implementation:

- Youth Homelessness Demonstration Program (YHDP): In 2023, SMOC was awarded a contract to implement a Rapid Rehousing project in North Worcester County. Eligible participants will be unaccompanied youth ages 25 and under. The project will employ a Positive Youth Development (PYD) Model by cultivating a community-based program that encourages youth in their independence as they live unaccompanied during their transition into adulthood. The project will involve seeking youth feedback to inform program design and implementation.

Goal 4: Sustain and increase partnerships among service providers who support our shared communities.

SMOC partners with an extensive assortment of agencies and service providers throughout the state. The agency collaborates with other subject matter experts in the field to develop and deliver an integrated system of care to underserved populations. We are committed to expanding and strengthening these relations in 2024-26. (Attachment F: List of Community Partners)

Goal 5: Sustain and increase SMOC's capacity to achieve results. SMOC accomplishes this goal through these existing efforts: Sound Fiscal Practices (see Section 8), **Staff Continuing Education** (Tuition Reimbursement and an internal Continuing Education web platform, Relias Learning), **Data and Outcome Collection** (see Section 5), **Resource Development** (see Section 8), **Volunteer Recruitment**, and **Electronic Records**.

New Projects Underway or Scheduled for Implementation:

- Property Management System Update: A new property management system has been selected to replace SMOC's existing system, RealPage. After extensive system and vendor evaluations through an RFP process, AppFolio was chosen. AppFolio offers more flexibility and functionality at a lower cost than RealPage. Implementation of AppFolio will begin in mid-Q3 of FY24 and completed by FY24 year end.
- ADP Enhancements: The Human Resources team is actively seeking ways to fully utilize ADP. By adding an electronic onboarding module to ADP Workforce Now, the time needed to process new employees will be reduced significantly and nearly eliminate the need for paper forms. Testing for electronic onboarding will commence in Q4 of FY24 with the plan to be completely implemented by Q1 of FY25.
- Electronic Device Management: The SMOC Information Technology team will pilot the Microsoft Intune device management platform in late Q4 of FY24 for implementation in Q1 of FY25. The Intune platform will provide remote management tools allowing the team to support SMOC's desktop computers, laptops, and mobile devices from one interface, increasing efficiency and better serving SMOC staff.
- Data Consolidation Initiative: In November 2021, SMOC received funding to consolidate data from program-specific databases into SMOC's centralized internal database, CSG Engage, to streamline reporting and monitoring processes agency-wide. Since this time, SMOC's has implemented an automated data transfer service from its VESTA database into CSG Engage. Currently, SMOC is engaging a data warehouse management company to develop an interface that will make it possible to extract data directly from the data warehouse into CSG Engage.

Goal 6: Sustain and create opportunities for low-income people to achieve their potential. SMOC accomplishes this goal through the following existing programs: **Emergency Assistance Programs**: Voices Against Violence, Fuel Assistance (LIHEAP), Marlboro Resource Center, and Open Door Social Services. **Child and Family Development Programs**: Head Start and Childcare. **Behavioral Healthcare Programs**: Sage House, Serenity House, Co-Occurring Enhanced (COE) House, New Beginnings, Rhodes House, Community Support Program for Homeless Individuals (CSP-HI), Family and Child Counseling Services, Mental Health/Substance Use Outpatient Services.

New Projects Underway or Scheduled for Implementation:



- **STEAM Lab:** On May 25, 2023, SMOC opened a state-of-the-art learning laboratory at its Framingham Childcare and Head Start site. This fully equipped 1,600 sq. ft. STEAM (Science, Technology, Engineering, Arts and Math) Lab offers interactive activities to encourage children to become creative problem solvers and inspire and educate a new generation of students.
- **Accelerate the Future:** In June 2023, Accelerate the Future, Framingham State University, and the Behavioral Health Partners of MetroWest (BHPMW) met to begin planning for a cohort of students to enroll and complete the Accelerate the Future, a Licensed Mental Health Counselor (LMHC) program in Massachusetts that is competitive in both its affordability and accessibility. In November 2023, SMOC was awarded a grant to support the development of this career path program.

Goal 7: Sustain and create food security opportunities for low-income people. SMOC accomplishes this goal through the following existing **Nutrition & Food Security Programs:** Women Infants, and Children (WIC), Loaves and Fishes and Emergency Food Pantry in Springfield, Head Start; and Lovin' Spoonfuls.

SECTION 5: HOW SUCCESS WILL BE MEASURED AND EVALUATED

SMOC is an outcome-based performance management agency and implements tools to evaluate agency, program, and individual client performance. SMOC completed its first joint DHCD/Northeast Institute for Quality Community Action (NIQCA) agency-wide assessment in May 2013. SMOC fully met the NIQCA organizational management and governance Best Practice Operating Standards. Since then, the agency has been assessed annually by EOHLC using the federal Office of Community Service CSBG Organizational Standards, as well as triennially with additional EOHLC standards, and continues to perform well. SMOC utilizes the nationally recognized Results Oriented Management Accountability (ROMA) methodology to set standards for projecting, measuring and reporting outcomes. All SMOC program directors utilize ROMA methodology in their 6-month and annual progress reports to EOHLC.

SMOC's Planning and Compliance department oversees functions related to community assets and needs assessments, strategic planning, program development, client data management, outcomes reporting and evaluation, data systems training, general compliance matters, and quality assurance policies and procedures. They work with all programs and maintain relationships with private, state, and federal funding and oversight agencies and are the primary drivers of SMOC's planning and evaluation processes.

On a programmatic and individual client level, SMOC utilizes qualitative and quantitative processes to evaluate program performance. Quantitatively, SMOC utilizes 15 different web-based data collection tools required by federal, state, or foundation funders and in combination with SMOC's internal database CSG Engage. For all programs, through a formal intake and data collection process, SMOC collects baseline, progress, and outcome information and data for program participants. Data is compiled for the duration of the clients' participation in a SMOC program.

Quantitative Processes

Databases utilized: CSG Engage (see following paragraph). Efforts to Outcomes (ETO): Utilized by SMOC family homeless programs and some individual and family housing programs, required by MA EOHLC. Clarity: Utilized by Worcester and Easthampton programs, required by the Worcester and Three County Continua of Care. RealPage: Utilized by SMOC housing programs to track property management functions. MRI/TenMast: Utilized by SMOC rental assistance programs to calculate and record payment. Empowerdb™: Utilized by SMOC's Voices Against Violence program. CareLogic: Utilized by SMOC Behavioral Health programs for service provision, scheduling, and billing. Child Outcome Planning and Administration (COPA): Utilized by Head Start and Childcare. Virtual Gateway: Utilized by SMOC programs funded by the MA Department of Transitional Assistance, Department of Public Health, and US Department of Agriculture. CSG Identity Data Systems: Utilized by LIHEAP and Energy Conservation. CMS: Utilized



by SMOC's Housing Consumer Education Center, required by the Regional Housing Network. eClinical: Utilized by OPCS Open Door Social Services Program, required by the City of Springfield. MySeniorNetwork: Utilized by LTLC in addition to CSG Engage. ClientTrack: Utilized by some supportive housing programs, required by MHSA. VESTA: Utilized by MetroWest and Lowell shelters, supportive housing, and street outreach programs, required by EOHLC and the Balance of State Continuum of Care.

SMOC's primary internal case management database, CSG Engage, is a multi-program web-based software that enables staff to collect, track, report, and share data amongst all its affiliates. CSG Engage captures client intake, referral, service participation, outcome, and case management information. CSG Engage provides aggregate and individual client reports which help assess program and client performance. The data system has the functionality to include data from some of the aforementioned databases to produce a more accurate unduplicated count and profile of the households and individuals served across the agency.

Qualitative Processes

Focus groups, peer groups, and satisfaction surveys are used in the development and review of all our programs. As detailed in Section 2, SMOC held focus groups with clients in four SMOC programs in 2023. A Peer Support Housing Model is also embedded in SMOC low-income and supported housing programs. This model fosters a culture of community input, support, and accountability whereby residents help maintain the houses' cleanliness, hold weekly residents' meetings, and participate in substance use programs such as Alcoholics Anonymous and Narcotics Anonymous. One resident serves as House Manager and coordinator of house activities and as a liaison with the Property Manager and Case Manager on matters like maintenance, house rules, behavior, and health. SMOC's education programs utilize satisfaction surveys. Student feedback is critical in shaping and evaluating classes.

Measuring Success

Every three years, SMOC convenes a series of meetings with the Executive, Senior Management, and Board representative to oversee and guide the implementation of the community and internal needs assessment. During the process, we prioritize the key needs that emerged from the needs assessments and identify the agency's strategic three-year goals to address these needs. Each goal is supported by objectives for the next three years, along with funding strategy, service delivery details, and strategic partnerships. In line with these objectives, SMOC submits both a CITC Statement of Progress and a CSBG Community Action Plan (CAP) every year, which contain information about SMOC's programs and their need, goal/strategy, and performance data for the prior year. In the FY23 CAP, examples of this data include:

- Home Modification Loan Program: FY23 goal to serve 40 participants, FY23 actual number served was 33, of whom 100% achieved the objective of individuals with disabilities receiving a home improvement to increase mobility (handicap access improvements, shower grab bars, etc.)
- Women, Infants, and Children: FY23 goal to improve food security for 7,500 individuals, FY23 actual number served was 9,312. This increase was the result of our ability to provide both remote and in-person appointments, and a heightened demand for WIC services due to inflation.
- Housing Consumer Education Center: FY23 goal to help 1,000 households avoid evictions by providing rental assistance, FY23 actual number served was 1,223. This was due to the increased volume of applicants and the corresponding increase of COVID-related rental assistance from the CARES Act.

SECTION 6: COLLABORATIVE EFFORTS TO SUPPORT IMPLEMENTATION

SMOC benefits from many collaborative relationships, programs, and efforts. The following are examples of SMOC's reach, breadth, and extent of partnerships in the planning, execution, and funding of our programs:



North Worcester County Collaborative Efforts: Over the last four years, SMOC has strategically engaged in partnerships with North Worcester County service providers and stakeholders to meet regional needs. In 2020, preliminary meetings began, facilitated by the Community Foundation of North Central Massachusetts, between the Central Massachusetts Housing Alliance and area stakeholders to develop solutions for the longstanding lack of emergency shelter beds in the region. In early 2021, the group became aware that the Days Inn hotel in Leominster, MA would be able to offer shelter space at a discounted rate if a service provider could manage the space and services. Given SMOC's experience managing both emergency shelters and hotel sites, the agency was asked by the group to act as the service provider. The space opened on January 6, 2021. Now in its fourth year of operations, SMOC's work in North Central MA has expanded to operate 78 emergency shelter beds at the Leominster hotel, thanks to securing long-term funding. SMOC's emergency shelter work at the Leominster hotel continues to be a driving force for permanent solutions that address the regional need for low-threshold shelter and housing.

SMOC is an active member of the North County Homelessness Network, a group of area providers that meet to discuss issues, share resources, and make referrals between groups. Regular members of the Network include SMOC, CHNA9, N. Central MA Faith Based Coalition, the Community Health Center, the Community Foundation of North Central MA, United Way, Restoration for Recovery, Making Opportunities Count (MOC), NuVue, Spanish American Center, UMASS Memorial – Heywood Hospital, Joint Coalition on Health, the City of Fitchburg, Aids Project Worcester, GAAMHA, LUK, Perception Psychotherapy, the Transition House, CMHA, and the office of State Representative Natalie Higgins. This list of members also closely resembles the list for the North Central Regional Housing Subgroup, part of the North Central Housing First Workgroup, which focuses on regional housing solutions.

Most recently, SMOC received a contract in 2023 to assist young adults in the North County region with securing permanent housing and an additional 26 beds will be available in Leominster for low-threshold temporary housing. This program will be provided in close collaboration with the Central MA Housing Alliance.

Lowell Collaborations: As a result of participating in the Lowell City Manager's Task Force on Homelessness beginning in 2019, SMOC entered conversations to purchase two Lowell properties to convert them to permanent supportive housing for chronically homeless individuals. As a result of a collaborative effort, SMOC purchased the properties in Spring 2022 with the plan to convert the buildings into 31 single room occupancy (SRO) units. In December 2023, SMOC held a ribbon-cutting ceremony for the opening of one of these buildings as a new Supportive Housing Program in Lowell. This project included support from the Greater Lowell Community Foundation, Massachusetts Housing & Shelter Alliance (MHSA), and EOHL.

SMOC collaborates with numerous Lowell-based partners to provide the necessary supports needed by clients. These organizations include Lowell House for substance use prevention programs; Merrimack Valley Food Bank for food resources; South Bay Mental Health and Eliot Community Human Services for mental health support and crisis intervention; Lowell Community Health Center and Lawrence Family Health Center for primary care; Lowell Police Department for identification of potential clients and outdoor campsites; Community Teamwork, Inc. for housing subsidies and financial assistance; Greater Lowell Workforce Investment Board for employment support; and Community Teamwork for financial assistance.

Medical Partnerships: In July 2023, SMOC hosted a ribbon-cutting ceremony for the opening of a new space for medical services at our Emergency Shelter Triage Center, located at 25 Queen Street in Worcester. In an effort to meet the growing need to access quality onsite healthcare during a shelter stay, SMOC, the City's Health and Human Services Commissioner, and the Family Health Center of Worcester began a collaboration to launch this initiative.



In August 2023, SMOC, in partnership with UMass Memorial Medical Center (UMMMC), was awarded a contract through the Executive Office of Health and Human Services (EOHHS) to pilot a Medical Respite Program located at 237 Chandler Street in Worcester, MA; this location is also home to one of SMOC's two 24-hour year-round overnight emergency shelters for unaccompanied single adults in Worcester. Since this award, SMOC has worked closely with UMMMC and EOHHS to ensure the pilot program is implemented in a timely manner; we are currently in the program start-up phase. The Medical Respite Pilot Program addresses the need for safe and equipped spaces for individuals experiencing homelessness to access once discharged from hospitals which will mitigate their risk of acute hospitalization, rather than returning to the street or shelter. SMOC and UMMMC will accept referrals to the Medical Respite Pilot Program for patients who are being discharged from a hospital within Worcester County after an inpatient stay or ED visit. Referrals may come from physicians, social workers, case managers, or nursing staff.

Expansion of Family Emergency Assistance Program: In November 2022, Massachusetts began to experience an increase in families seeking emergency shelter statewide. As traditional Emergency Assistance (EA) shelter space reached capacity, hotels became increasingly utilized to meet the demand. It was at this time that SMOC began coordinating a response to provide support services to families placed in these local hotels, many of whom have recently arrived in the United States. In the span of one year, SMOC's family shelter team added new staff and we now serve over 200 families in hotel settings including more than 330 children. To ensure care coordination with area providers, SMOC takes part in the Support for Recent Migrant Families group, the Family Shelter Providers Collaborative, and the Haitian Task Force through the City of Worcester.

MetroWest Homelessness Collaborations: The Behavioral Health Partners of MetroWest (BHPMW) is a human services partnership that operates with the goal of improving community health outcomes through better access to and coordination of care. BHPMW makes it easier for area residents to access a continuum of high-quality behavioral health, community development, and social services in the greater MetroWest area, bringing together the strengths and capabilities of four leading social services and behavioral health agencies in the MetroWest region. Together, these partners—Advocates, SMOC, Spectrum Health Systems, and Wayside Youth & Family Support Network—bring expertise in mental health, substance use and addiction, housing, and social supports for people of all ages.

In 2020, BHPMW launched the MetroWest Care Connection (MWCC). The MWCC operates as a health and social services hub to better connect people to the services and supports they need to thrive in their community, with a focus on serving Ashland, Framingham, and Natick. MWCC offers weekly cross-agency care planning meetings that bring together clinical providers, care managers, municipal representatives including police departments and town social workers, and other human services to rapidly deploy resources and supports to individuals and families with complex multi-sector needs, including mental health, substance use needs, and housing. SMOC attends these weekly meetings to assist with care coordination for individuals and families who are presented. In December 2023, SMOC received funding in partnership with BHPMW from the MetroWest Health Foundation to provide emergency hotel shelter placements for local families to prevent or quickly resolve an episode of homelessness.

The MetroWest Health Foundation also supports SMOC's work at its Day Center located in Downtown Framingham. The Day Center opened in February 2023 and receives on-call support from the Framingham Police Department. The Day Center also partners with Advocates, Justice Resource Institute (JRI), Spectrum, Jewish Family Services, local community centers, and Veterans Inc. Haircuts have been provided to guests through Downtown Framingham, Inc. and Eliot Human Services is on-site one day a week to conduct outreach and make service connections

SECTION 7: INTEGRATION OF ACTIVITIES/CONSISTENCY WITH COMMUNITY STRATEGY AND VISION

As a participant on community boards, SMOC integrates and implements community and economic development



priority goals developed by local, municipal, regional, and statewide planning entities. Historically, and by federal mandate, SMOC has been an advocate and activist for low-income populations:

- In 1985, SMOC convened the MetroWest Area Homeless Task Force, consisting of local community-based organizations and town leaders to examine the growing issue of homelessness within its jurisdiction. Recognizing that lack of affordable housing was the number one leading factor to becoming homeless or being at-risk of homelessness, SMOC began converting its emergency homelessness services to a Housing First Model.
- In 2006, MA instituted a Special Commission Relative to Ending Homelessness in the Commonwealth. SMOC played a significant role in its leadership. Its findings recommended a paradigm shift in homelessness services, away from emergency shelter-oriented to prevention-oriented, rapid rehousing and permanent housing.
- In 2008, Governor Deval Patrick established the Interagency Council on Housing and Homelessness consisting of a cross section of state agencies and community-based organizations to carry out its recommendations and to overhaul the state's homelessness services from emergency shelter to the Housing First model in 10 regions.

On local and regional levels, SMOC has been asked by several municipalities to help solve the complicated community issue of homelessness. SMOC has contracted out to manage existing emergency shelters and has also sat on the local task forces working to end homelessness. Subsequently, local programs affiliated with SMOC as subsidiaries.

- Beginning in 2006, SMOC assisted the City of Worcester in coordinating the closing of the People in Peril Emergency Shelter and set in place the infrastructure and support programs to operate a Housing First program. The outgrowth of *Worcester's 3-Year Plan to End Homelessness* (2007).
- In 2009, SMOC affiliated with Open Pantry Community Services of Springfield, which operates a number of social service programs including a food pantry in the Springfield area. This program supported the City's *10-Year Plan to End Homelessness* (2007).
- In 2013, SMOC affiliated with Lowell Transitional Living Center which provides food, shelter, and programs for low-income and homeless individuals in Lowell. Though this partnership SMOC assisted Lowell in enacting the *10-Year Plan to End Homelessness* (2008).

SMOC works with numerous planning entities that oversee, develop and prioritize community and economic development projects that benefit low-income people. These entities, plans, and outcomes are listed below.

- Family Shelter Systems: Over the last year, SMOC has engaged in three community groups—Support for Recent Migrant Families, Family Shelter Providers Collaborative, and the Haitian Task Force (City of Worcester)—to share resources among service providers and troubleshoot common issues.
- Worcester City Manager's Task Force on Sustaining Housing First Solutions: Worcester convened a 28-member Task Force in March 2018 on which SMOC was represented which worked for months to explore gaps and resources related to homelessness. The group issued a report in July 2018 which included action items to address homelessness among single adults in Worcester.
- MetroWest Care Connection: SMOC participates along with members of the Framingham Police Department, City officials, area providers, and business owners in a regular series of meetings to review quality of life issues and concerns that occur in the downtown area. The group develops strategies for enhanced communication and intervention to address emerging issues.
- North County Homelessness Network: SMOC is a member of the North County Homelessness Network, a group of area providers that meet to discuss issues, share resources, and make connections to do inter-organizational referrals between groups.

SECTION 8: FINANCING STRATEGY

According to SMOC's FY23 Audit, revenues were \$155,684,199 with total expenses of \$154,413,757. SMOC's fiscal



strength and capacity comes from the diversity of our programs, which are all mission-oriented to help program participants meet their needs and become self-sufficient. In FY23, SMOC managed \$133,591,339 in federal, state, and local contracts for funding. Through the Housing Corporation, SMOC earns revenue from real estate development, rental property income, and sublease income which contributes to the sustainability of our housing programs. In FY23, SMOC received \$7,554,953 in rental revenue. SMOC's size helps us to leverage costs over a larger base when compared to other nonprofits, and positions us to continue earning grants, contracts, and donations from many sources. SMOC's overhead rate is 10%.

In addition to reporting on South Middlesex Opportunity Council, Inc. and SMOC affiliates' financial statements, the following types of reports are issued with the same level of independent auditor responsibility as is assumed for financial statement reports:

- A supplementary report on the fairness of the presentation of the organization's Schedule of Federal Awards;
- Audit of the organization's Uniform Financial Statements and preparation of the Uniform Financial Report (UFR) for the Commonwealth of MA;
- Reports on compliance with statutory, regulatory and contractual matters that meet the requirements of the Government Auditing Standards and the requirements of the OMB Circular A-133 and the requirements of the UFR Auditor's Compliance Supplement issued by the Commonwealth of MA Executive Office for Administration and Finance, Division of Purchased Services, dated June 1994;
- A combined report on the organization's internal control structure and controls used in administering Federal award programs that meet the requirements of Government Auditing Standards and of the OMB Circular A-133.

SMOC is in good standing with the MA Department of Revenue, the Commonwealth of MA Office of the Attorney General, and the Commonwealth of MA Secretary of the Commonwealth, having met all of our legal and contractual obligations in a timely manner since the inception of the Corporation.

The capacity to develop low-income properties requires a development model with grants and low-interest financing to keep housing affordable for individuals who at or below 30% of the area median income. For more than 20 years, SMOC's Housing Corporation has partnered with EOHLC (formerly DHCD), the Massachusetts Community Economic Development Assistance Corporation, HUD, Federal Home Loan Bank, and local banks for grants and low-interest loans. The diversified Net Assets (balance sheet) of the Housing Corporation consist of real estate assets comprising 1,247 rental units across our service area, various highly collectible receivables (expected to be collected within 30-90 days) mostly with the Commonwealth, and healthy positive cash balances.

Through a Resource Development department of seven full-time professionals, SMOC sets ambitious fundraising goals to garner considerable new and increased income from individual donors, foundation, corporations, events, and annual appeals. In FY24, SMOC's overall resource development goal is \$2,273,239 from these revenue sources and others. As of the close of Q2, we have raised \$1,860,944, approximately 68% of our annual goal. \$455,000 of the funds raised to date in FY24 have been from individual, corporate, and foundation donors who received CITCs.

CITCs have enabled SMOC to outreach to current and potential donors and solicit new and/or larger gifts. Of our 37 CIRC donors in 2023, 9 were new or lapsed, 6 gave more than the previous year, 17 gave the same as the previous year, and 5 gave less. 43% of gifts supported SMOC shelters; 20% supported the Framingham Community Center; 19% supported our ESL program; 10% were unrestricted gifts; 6% supported feeding programs, and 2% supported SMOC Financial Services. Three of our largest gifts are yearly commitments that were negotiated in part due to the availability of CITCs. Many more of our existing corporate and individual donors qualify for CIRC program (over 200 donors gave \$1,000 or more in 2023) and we saw a significant increase in new donors due to offering credits.



SMOC's affiliates, Lowell Transitional Living Center and Open Pantry Community Services, are significantly reliant on and successful at raising funds to support its programs from the community:

- Open Pantry Community Services' FY24 budget is \$2.5M. OPCS' FY24 fundraising goal is \$490,000; at Q2, we have successfully raised \$393,416 (80%) from donors, grants, and fundraising events.
- Lowell Transitional Living Center's FY24 budget is \$1.7M. LTLC's FY24 fundraising goal is \$65,000; at Q2, we have successfully raised \$74,317 (114%) from donors, grants, and fundraising events.

Strategies Going Forward

As presented, SMOC's fundraising strategies have produced a growing base of individual, foundation, and corporate supporters that qualify for the CITC Program. Historically, SMOC has successfully leveraged the CITC program to raise funds and, if awarded, a subsequent allocation of \$300,000 will help SMOC raise a minimum of \$600,000 in revenue to fund new and existing programs presented in this CIP. SMOC has a proven ability to process and utilize the CITCs promptly and in support of our goals.

SMOC's will continue to utilize a strategic budget planning process that includes all Divisions, Administration and Finance, and the Senior Management Team working together to construct the agency's respective budgets and strategic initiatives that shape the operating framework for each fiscal year's budget. For FY24, SMOC's revenue is projected at \$172,726,100 and expenses at \$168,228,057 (please see Attachment E: SMOC's FY24 Budget which shows a breakdown of funding sources and funding allocation). SMOC's financing strategy is to continue to partner with federal, state, and local entities for contracts to fill housing and programmatic needs in the communities we serve. The Housing Corporation will continue to add and improve developments that have solid funding for implementation and ongoing operations.

The Resource Development department will continue to focus on increasing grant, foundation, corporate, and individual donations through agency-wide and program-specific fundraising. A few of these efforts are listed below:

- Voices Against Violence Purple Passion Run/Walk: Raised \$32,960 in 2022 and \$20,123 in 2023.
- Annual Charity Golf Tournament: Raised \$60,765 in 2022 and \$60,870 in 2023.
- Open Pantry Community Services Holiday Events: Raised \$114,593 in 2022 and \$154,398 in 2023.
- Lowell Transitional Living Center Steps to Home: Raised \$44,615 in 2022 and \$48,399 in 2023.

SECTION 9: STORY, TRACK RECORD AND SUSTAINABLE DEVELOPMENT

SMOC was incorporated in 1965 in Framingham, following President Johnson's War on Poverty. Johnson's Economic Opportunity Act in turn created Community Action Agencies "to 'strike poverty at its source...'" SMOC's first program was Head Start. In 1986, SMOC created a wholly owned subsidiary, the South Middlesex Non-Profit Housing Corporation (Housing Corporation) to respond to the local and statewide crisis of affordable housing. SMOC's Housing Corporation has created a unique and successful approach to serving the needs of low-income households by integrating case management and SMOC's wraparound services and community-based support services with rental units, with the goal of tenants sustaining stable housing which supports self-sufficiency. In 1991, SMOC absorbed Trinity Mental Health Services, thus creating SMOC Behavioral Healthcare (SBH). Today, SBH provides a wide range of outpatient services, including substance use and mental health service, to children, adults and families.

In 2006, SMOC piloted the first Community Support for People Experiencing Chronic Homelessness (CSPECH) project in the state. SMOC then piloted the Transition Age Youth CSPECH Program (TAY) to deliver the Community Support Services level of care to up to 40 homeless individuals ages 18 to 24 in the City of Worcester to stabilize these youth and interrupt the cycle of homelessness. Since then, CSPECH (now CSP-HI) has become a statewide



program and continues to expand its services. In 2010, in partnership with the City of Worcester, SMOC incorporated with the People in Peril (PIP) Emergency Shelter in Worcester. The shelter closed and the Greater Worcester Housing Connection (GWHC) opened. In 2009, SMOC affiliated with Open Pantry Community Services of Springfield and then, in 2013, Lowell Transitional Living Center. In 2016, SMOC launched SMOC Financial Services to provide micro-loans to start-ups and small businesses unable to obtain a regular bank loan.

In recent years, SMOC has continued to embark on a wide range of responsive programming:

- In 2020, SMOC opened its Peer Recovery Support Center, Anchored in Recovery, in downtown Framingham to offer people in recovery an opportunity to design and lead their own recovery groups and services. SMOC also became a flexible service provider for three Accountable Care Organizations, providing better linkages to care.
- In July 2022, SMOC began offering a Low Threshold Permanent Supportive Housing (LTPSH) program funded through a contract with the Department of Public Health (DPH). This housing program provides funding for 36 new units of low-threshold, supportive, scattered site housing in Springfield, Worcester, and Lowell.
- In 2023, SMOC's GJA introduced a new Mobile Training Center box truck to support the program's regional expansion efforts and provide hands-on weatherization training off-site throughout New England. SMOC also opened a state-of-the-art STEAM lab at its Framingham Head Start and childcare site to benefit underserved children, was awarded a contract to implement a Rapid Rehousing project in Leominster/Fitchburg for unaccompanied youth ages 25 and under, and was awarded a contract in partnership with UMass Memorial Medical Center to pilot a Medical Respite Program located at 237 Chandler Street in Worcester, MA. The program is currently in the start-up phase.

Sustainable Development

The following examples illustrate SMOC's consistency with the Commonwealth's Sustainable Development Principles including Concentrate Development and Mix Uses; Advance Equity; Make Efficient Decisions; Protect Land and Ecosystems; Use Natural Resources Wisely; Expand Housing Opportunities; Provide Transportation Choice; Increase Job and Business Opportunities; Promote Clean Energy; and Plan Regionally.

SMOC's Housing Corporation Building Practices: SMOC created its Housing Corporation in 1986 to **Expand Housing Opportunities** for those in need of affordable, supportive, and/or emergency housing. SMOC's development strategy is to invest in substandard and distressed properties and redevelop them into affordable and/or supportive housing. In accordance with **Concentrate Development and Mix Uses**, revitalizing existing structures rather than building new construction preserves neighborhoods and conserves open spaces. SMOC often develops these properties into lodging houses, which is a dense housing model; one building may contain 16 or more units. The Dover Amendment provides for **Efficient Decisions** when it comes to zoning for these dense properties, allowing for more concentrated living arrangements without requiring lengthy zoning relief efforts.

SMOC is focused on providing more units of affordable, permanent, supportive housing in Massachusetts. SMOC's next two major projects involve creating 38 new units in Worcester and pursuing the acquisition of a 101-room hotel for conversion to shelter and permanent supportive housing use. SMOC is also focused on how to **Use National Resources Wisely** by focusing on decarbonization and energy efficiency capital repairs projects in its existing portfolio as funding allows.

SMOC owns and operates six family emergency shelters in the MetroWest area. By situating these shelters within neighborhoods, we **Advance Equity** by housing homeless families within converted single-family homes in residential settings, which helps remove some of the stigma of living in a shelter. These properties are not labeled from the outside and blend into their neighborhoods. We **Expand Housing Opportunities** for those with physical disabilities



by ensuring the availability of accessible housing, from ramps and ADA-compliant bathrooms and kitchens in many properties, to installing a bed-shaker in one of our family shelters to accommodate a deaf family.

Many of SMOC's properties in Framingham are within walking distance of the downtown area, which includes a hospital, restaurants, markets, bus stops, a train station, and businesses. Likewise, many of SMOC's affordable units in Worcester are on local bus lines. This proximity **Provides Transportation Choice** for a population often without a car. Many of our programs, as well as our office buildings, are within proximity of public transportation and other services also helps to reduce reliance on personal automobiles and travel times, which helps to **Mitigate and Adapt to Climate Change**. SMOC operates its main offices as "service hubs," where low-income individuals and families can access an array of services in one stop, reducing travel times and creating triage and coordination efficiencies.

Suburban Athletic & Child/Framingham Community Center (FCC): Built in the mid-1970s and purchased by SMOC in 2019, Suburban Athletic & Child contains Head Start and childcare classrooms, indoor courts, offices, and community spaces. SMOC has renovated this facility to preserve and update the classrooms to meet safety guidelines and to create space for community programming to **Advance Equity** in the underserved and low-income area of Framingham. The FCC operates a Social-Emotional Learning mentor program for low-income preschool children in Suburban's childcare programs to help them develop the social-emotional skills they need to learn and grow. Revitalizing childcare, athletic, and community space in the heart of a low-income neighborhood is an impactful investment in a population that is severely underserved. Besides operating buses for students in the childcare programs, the property is also located blocks from the MetroWest Regional Transit Authority's hub and half a mile from the Framingham Commuter Rail station to **Provide Transportation Choice**.

Affordable childcare is a critical component to **Increasing Job and Business Opportunities**. According to a 2024 report by World Population Review, Massachusetts was the second most expensive state in the country for annual cost per child. Without sufficient slots of Head Start and voucher-based childcare, low-income parents are unable to afford childcare and necessities such as rent and food. SMOC's Head Start and childcare programs expect to serve over 1,000 children this year, almost all of whom are on vouchers or other subsidies. Preserving this complex and the classrooms and community resources within the complex is an example of **Planning Regionally**, as it will offer long-term benefits to Framingham's community development.

Green Jobs Academy and Energy Conservation Services: In 2010, SMOC created its Green Jobs Academy (GJA) to assist low-income and un/underemployed populations in obtaining jobs with a living-wage and a career ladder in the weatherization industry, and to provide cutting edge continuation education. To support regional expansion efforts aimed at meeting industry demand, GJA relocated to 91 Bartlett Street in Marlborough, MA in 2021 and now occupies over 6,000 square feet of adjoining classroom, office, and lab/training space. This new location provides easier access and ample parking for trainers, staff, and students—both local and out-of-state—and allows for expanded coverage across New England.

GJA helps **Increase Job and Business Opportunities** by training un- or underemployed workers in a field with many living-wage job opportunities, helping to meet the demand for skilled labor in a major industry in Massachusetts. Weatherization and related fields are expected to continue growing due to Massachusetts' commitment to **Mitigate and Adapt to Climate Change**. SMOC's Energy Conservation Services (ECS) division provides assessments of heating systems, appliances, and lighting, and offers replacements in each of these areas to reduce costs and improve energy efficiency. ECS is available to low-income households. ECS also assesses SMOC properties and provides guidance and best practices to help SMOC properties purchase energy-efficient appliances. Working to better educate SMOC tenants through the integration of ESC staff and property managers is a goal for near future.