

**Community Investment Tax Credit  
Somerville Community Corporation  
Community Partner Statement of Progress, February 2022**

1. Restate goals from the most recently updated CIP. Include the original projected timeline for activities in support of goals, along with actual progress covering only the past year.

The City of Somerville is undergoing tremendous transformation. 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 3 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;

- Expanding employment programs that connect workers to good jobs, advocating for employment standards and public policies that support the creation of good jobs;
- Building the leadership of residents across the city, and helping to raise the voice of immigrants and other underrepresented constituencies; and
- 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 work to find commonality among stakeholders
- *Justice and equity:* We pay particular attention to the voices of the marginalized; 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.**

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

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

#### Statement of Progress 2021

In 2021, SCC's partnership with POAH, Redgate, and the Somerville Housing Authority was able to secure approval from the State's Department of Housing and Community Development to proceed with the first affordable building as part of the overall redevelopment of Clarendon Hill, an existing public housing development. Once completed, the site will feature 296 new affordable units. We will begin temporary resident relocation (all residents will have the right to return to the site upon completion of the project) during the spring/summer of 2022 and we expect to

begin demolition and construction during the summer/fall of 2022. SCC is also partnering with POAH on two other developments in Union Square and has been advancing these projects over the last year. Each of these developments will produce between 30 and 40 new units of affordable housing. In the spring of 2021, we pursued another pipeline opportunity in partnership with POAH, and while this site was ultimately acquired by a competitor, we did use the opportunity to build or strengthen relationships with lenders, our architects, the City, and a local broker. Lastly, we received certificates of occupancy for 8 out of the 11 condominium units under development at our 163 Glen Street project. In the fall of 2021, we sold 6 of the units and anticipate selling the remainder in the first quarter of 2022.

2. *Develop affordable multifamily housing in neighboring communities, where SCC can 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

Statement of Progress 2021

In 2021 we began conversations with the City of Malden to develop and/or preserve affordable housing throughout the community. Specifically, we are exploring the possibility of partnering with the City to acquire a large portfolio of homes that have been foreclosed on and preserve them as affordable in perpetuity. This partnership will provide much-needed affordable housing in a community that does not have a traditional CDC and will allow SCC to expand our service provision to our neighbors.

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

Statement of Progress 2021

In 2021 we employed a summer intern through the Massachusetts Clean Energy Center to review trends in energy efficiency and sustainable design/construction and make recommendations for our portfolio. We also replaced the roof and installed solar panels on our office building, and it was the first full year we started to realize energy savings at our properties where we had previously installed solar panels. At a 16-unit property we replaced all of the aging windows with new energy-efficient windows, significantly improving the property. We pursued passive house design standards with our architect while working on a pipeline project, and while this project did not come to fruition, we strengthened our knowledge around this topic and will continue to pursue it for projects in the future. We are also exploring the possibility of using modular construction for the redevelopment of Clarendon Hill. If we do decide to take this approach we

will benefit from a factory-controlled construction setting and also enable the development of a new modular factory that can benefit the affordable housing development landscape for years to come. Lastly, in 2021 we hired a Community Engagement Specialist who provides additional resources to residents across our current and future (Clarendon Hill) portfolios.

**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

Statement of Progress 2021

SCC pursued multiple new acquisitions in 2021 but ultimately did not acquire any units. However, we took significant steps to improve and stabilize the units already within our portfolio. This includes: receiving over \$7 million in permanent subsidy to pay off the bridge debt used for initial acquisition; permanently financing our most recent acquisition, a three-family property we acquired at the end of 2020; pursuing tax abatements for our portfolio; securing additional subsidy from the City of Somerville for repairs and operating costs; and undertaking larger renovations at three separate properties. While we unfortunately experienced a fire at one of our properties in 2021, we were able to secure new housing in our portfolio for all tenants who wanted, and we have been working diligently with the insurance company to get this property back online as soon as possible.

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

Statement of Progress 2021

In 2021 SCC explored the potential acquisition of multiple properties with existing tenants (or artist spaces, in one instance), though none of these came to fruition. In some situations, we were able to connect the property owners with other organizations that could help, and we have explored partnerships with other local developers and the new community land trust to potentially amplify our impact. We have also continued to secure crucial rental assistance for tenants whose livelihoods were negatively impacted by the ongoing pandemic.

**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

#### Statement of Progress 2021

In 2021 we hired a new Senior Property Manager and a new Maintenance Technician, both of whom bring a wealth of knowledge and experience to the organization and portfolio. We continue to improve the physical condition and financial health of our properties, in many cases exceeding projections and/or improving on our 2020 financial outcomes.

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)

#### Statement of Progress 2021

In 2021 we used over \$7 million in permanent subsidy to pay down bridge loans used to pay for property acquisition. This permanent financing structure will improve the stability of our portfolio moving forward. We also began exploring refinancing opportunities at some of our larger multi-family properties and will continue to pursue these in 2022.

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

#### Statement of Progress 2021

In 2021 we continued to use the asset management performance dashboard to track portfolio performance and suggest improvements on a monthly basis. We met with our property managers regularly to discuss overall performance, specific issues, and payments to SCC and investors/lenders.

#### **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.

#### Statement of Progress 2021

In September of 2021, we hired a Community Engagement Specialist to serve the areas of

community organizing and resident services coordination. Through this position, resident services programs were initiated at SCC properties. These included over \$70,000 of rental assistance, Covid-19 testing and information distribution, and local resource education. Over 170 gift cards were delivered to families for assistance over the holidays. A comprehensive guide on Somerville community resources and SCC programs is being developed to be a permanent reference for SCC tenants.

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

Statement of Progress 2021

In September of 2021, we hired a Community Engagement Specialist to focus on community organizing and resident services coordination. Through this position, resident services programs were more formally initiated at SCC properties. A resource packet for tenants to be able to more easily access mental health resources, mediation services, legal resources and SCC services is nearing completion and distribution. A resident satisfaction survey is also in progress to measure improvement of SCC services and sense of community. Several SCC tenants are in consideration for leadership positions at both the board level and among fellow residents in their building communities.

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

**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

Statement of Progress 2021

The Covid-19 Pandemic continued in 2021 and made building our membership base challenging. We continued to focus on supporting our existing members, tenants, and participants through the crisis by pivoting our departments to help with unemployment applications, rental assistance, and tenants' rights. Additional services were launched to distributing Covid-19 at home tests, and provide consistent updates on local vaccination and

testing options.

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

Statement of Progress 2021

We have improved our cross-organizational communications and interdependence, including weekly meetings with representatives from different departments attending. We continue to have a very active membership base. We intend to set and reach these goals once the pandemic is in recession.

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

Statement of Progress 2021

Because of the pandemic, the Leadership Development Institute continued to take a backseat to other organizational priorities. We took the lead and initiative around rental assistance applications, tenant rights workshops, and Covid-19 test kits/resource distribution. The Organizing team took on the increased staff workload of helping with RAFT applications and developed an in-house system for helping SCC tenants apply for Subsidized Emergency Rental Assistance (SHERA) funding. With the support of the Mayor of the City of Somerville, local police and city officials, we hosted a training in one of our properties on how tenants could keep their properties and communities safe.

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

#### Statement of Progress 2021

The Leadership Development Institute took a backseat to other organizational priorities, such as rental assistance applications, unemployment application coaching, tenant rights workshops, Covid-19 test kits distributions and RAFT applications.

We also hosted in one of our properties a safety training with our residents, with the support of the City of Somerville Mayor, local police, city officials and tenants and how to keep their properties and communities safe.

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

#### Statement of Progress 2021

In 2021, the LDI continued to take a backseat to other organizational priorities, such as rental assistance, tenant rights workshops, and Covid-19 resource distribution. The Organizing team also took on the increased staff workload of helping with RAFT applications and developed an in-house system for applying SCC tenants for Subsidized Emergency Rental Assistance (SHERA) funding.

#### **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

#### Statement of Progress 2021

After TOPA legislation passed in the State House in 2020, it was vetoed by Governor Baker. SCC continues to support State Representatives and community organizers petitioning the TOPA bill in the Massachusetts General Court. The TOPA bill would permit Somerville to create a program where tenants of a property would be given the chance to purchase it jointly before it is put on the market. As housing prices continue to rise in Somerville, it has become more and more difficult for residents to obtain affordable housing and to avoid eviction. TOPA will help preserve affordable housing in Massachusetts and will be an important win for community stability and tenants' rights.

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

Statement of Progress 2021

In 2021, we were able to add 27 new employer partners to SCC’s list of organizations that work directly with our program, and with whom we advocate to increase quality and accessibility of jobs. At our Spring 2021 Employer Advisory, job quality and accessibility were the main themes. In particular, our partnership with Encore has led to numerous job placements that all pay over \$20/hour. We also successfully advocated for Boston Children’s Hospital to increase job accessibility by removing a questionnaire from the application process.

Additionally, we added a jobs board, in which our employer partners can directly post positions in their organization and which greatly benefits our clients, because they get fast, relevant results in their job search

We were also very successful in raising funds for our program with the following channels:

- USQ Community Benefits Agreement: \$100,000
- City of Somerville CDBG: \$50,000
- City of Malden CDBG: \$50,000
- MassHire: \$43,000
- Capital One Bank: \$20,000
- Somerville Housing Authority: \$13,000
- SCALE: \$8,000
- Total: \$284,000

First Source Outcomes included:

- We served 246 clients and we placed 76 individuals in new jobs
- Average starting wages were \$16.80
- Average hired wages was \$19.80
- Demographics of clients by placements
  - Latino: 48%
  - African American/Black: 28%
  - White: 16%
  - Asian: 5%
  - Other: 2%

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

#### Statement of Progress 2021

In partnership with the Union Square Neighborhood Council, SCC has already received approval on a new Community Benefits Agreement with DLJ Development. The USNC is also working on a similar initiative in East Somerville. We continue to work with the City of Somerville to encourage policies with similar benefits to the community as the CBA.

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

##### **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

#### Statement of Progress 2021

In 2021, we moved to an online curriculum and were able to help over 410 participants via Homebuyer Education Training and Online Education classes. Additionally, we are working on a curriculum to start offering online Financial Education classes to our local community.

All of the participants received their homebuyer education diploma, so that they can begin their search towards homeownership. We are working with an intern to begin tracking the graduates who eventually buy a home and aim to have that data by the end of 2022.

Of the 410 participants, 156 participants engaged with us on additional one-on-one counseling, which included the following outcomes:

- (41) Households that received one-on-one counseling that also received group education services.
- (29) Households that received information on fair housing, fair lending and/or accessibility rights.
- (35) Households for whom counselor developed a sustainable household budget through the provision of financial management and/or budget services.

- (32) Households that improved their financial capacity (e.g. increased discretionary income, decreased debt load, increased savings, increased credit score) after receiving Housing Counseling Services.
- (16) Households that gained access to resources to help them improve their housing situation (e.g. down payment assistance, rental assistance, utility assistance, etc.) after receiving Housing Counseling Services.
- (2) Households that gained access to non-housing resources (e.g. social service programs, legal services, public benefits such as Social Security or Medicaid, etc) after receiving Housing Counseling Services.
- (1) Households that received prepurchase/homebuying counseling and purchased housing after receiving Housing Counseling Services.

## 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 providing point of contact and agreeing 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

### Statement of Progress 2021

We served 257 participants in 2021, with 76 job placements, and held weekly virtual Networking Cafes (job readiness workshops and employer info sessions) throughout the year (at least 45 total), as well as 2 job fairs focused on construction trades and the Union Square development.

New employer partners include: Brightview Landscaping, Basis Technology, Northeast Security, ABCD, Cataldo Ambulance, Fenway Heath, Prospect Hill Academy, Midtown Home Health, and United Temps

We have been measuring job readiness by number of participants who receive at least 3 different job readiness services (job search, career exploration, resume, interview prep, references, salary negotiation, etc.). The average wage increased from baseline \$16.80 to \$19.80 after job placement.

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

Statement of Progress 2021

We made a deliberate decision to move away from the cohort model, due to its limited success compared to direct job placement combined with individualized job coaching focused on soft skills and job readiness that can be applied to all sectors.

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

Statement of Progress 2021

We continually refer FS participants to FTHB classes, and vice versa. We are improving our tracking and data entry systems in Salesforce, and aim to meet these metrics soon.

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

Statement of Progress 2021

We continue to expand regionally, serving 38 residents from Malden, 21 from Everett, and 17 from Medford. We ended our Spanish Networking Café due to low attendance (perhaps due to time of day), but continue to provide interpretation in Spanish, Portuguese, and Haitian Creole at our regular Networking Café and attract a diverse group of job seekers.

**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

Statement of Progress 2021

Status information was tracked for participants when available. In 2021, eight FTHB participants purchased a home. Many of our participants were from demographics and career fields hardest hit by the pandemic. We maintain the goal for 2022.

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

Statement of Progress 2021

Our First Source Jobs Program is looking at this strategic initiative as a possible application in 2023, and is meeting with the Community Business Network, Innovation Labs, and other groups that can help us start developing a Small Business program. Our Economic Opportunity Manager has already taken some courses, met with local influencers, bankers, and entrepreneurs to get a grasp of what this program would look like.

We are also beginning to develop a curriculum and start searching for funding sources, as well as seed money for potential participants. We are hoping to host a "Shark Tank" business idea competition in the future and aim to accomplish this prior to the end of our strategic plan period.

**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

#### Statement of Progress 2021

In lieu of enforcing strict standards, we have been encouraging them by recognizing employers that have excelled in job quality and accessibility. Our Employer advisory meetings regularly have 15+ employers in attendance.

In 2021, we launched our job board, which requires employers to post salary range, increasing transparency and incentivizing job quality.

New employer partners include: Brightview Landscaping, Basis Technology, Northeast Security, ABCD, Cataldo Ambulance, Fenway Health, Prospect Hill Academy, Midtown Home Health, and United Temps.

Despite Covid-19 hiring challenges, we placed 76 people into good jobs.

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

#### Statement of Progress 2021

SCC received \$100,000 from the Community Benefits Agreement to support local jobs, \$50,000 from the Community Development Block Grant Somerville, \$50,000 from the Community Development Block Grant Malden. SCC continues to partner with SCALE, the Asian American Civic Association, and Just a Start.

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

**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

#### Statement of Progress 2021

Our new slate of board members will be more representative of the demographics that we serve and have been nominated to serve at our annual member meeting on March 31, 2022. Our new board representation will include 4 tenants, 4 Latinx members, 5 African-American members, and have a female to male ratio of 69%.

We are working hard to improve new member opportunities for engagement and participation. We are bringing a consultant to train our new slate of board members and are now providing a handbook that describes the roles and responsibilities of board members. We will also assign a coach/mentor relationship to encourage maximum participation. We now have an online digital platform, Board Effect, that allows board members to have access to relevant documents and materials at all times. Board packets are distributed at least one week ahead of time.

We have improved significantly the timeliness of key decision making and the CEO/Board relationship is also being strengthened to ensure that effective decisions are made in a changing and challenging landscape.

#### **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

#### Statement of Progress 2021

SCC has created an internal task force that will seek to sign the MACDC Racial Pledge. We have also worked hard to diversify our staff and 65% of interviewees for new positions considered themselves people of color. We are also recruiting professional candidates of color and our new slate of directors will have 8 board members of color and 2 women.

Once the diversification plan is complete, we will begin to create a decision-making process in which staff members and a board member together will chair committees that will begin to draft ideas to be elevated to the board. These committees will include: Affordable Housing, Finance, Events & Communications, Economic Opportunity; we are also hoping to add a new Tenants & Organizing Committee.

From a technology and systems standpoint, we have been able to integrate Salesforce for the Asset Building Program, First Source Jobs, and Fundraising programs. We will do the same for the Organizing and Affordable Housing programs in 2022, with the goal of being able to effectively and efficiently review—and whenever possible, meet-- our clients' goals and continue to improve our programs and services.

#### **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

#### Statement of Progress 2021

SCC has improved our finances dramatically over the last two years. After having four consecutive years of revenue losses, we have had back-to-back years of positive gains. We have begun drafting budgets that are more conservative and realistic, more tightly controlling our expenses, and finding new revenue sources for the organization, especially in banking and government funders.

We are still behind in obtaining any developer fees for our construction developments. Last year was the sixth year in a row without any significant developer fees. We have closed 7 of the 11 units at our Glen Street Condominiums, and Clarendon Hill is slated to close at the end of Quarter 3 in 2022, so we are optimistic that our finances will continue to improve.

After that, we aim to build our reserves and our balance sheet, so that we can strengthen credibility with investors and banks in the future.

#### **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

#### Statement of Progress 2021

We continue to communicate quarterly with our members via our newsletters. We hosted a Mayoral Debate, and we had a beautiful screening of the SCC Video "Somerville for All" ([vimeo.com/482036867/bf2f526919](https://vimeo.com/482036867/bf2f526919)) during the summer, drawing an in-person audience

of more than 30 people. We also hosted two community forums: one around racial equity & inclusion and one around affordable housing.

Unfortunately, the continued Covid-19 pandemic did not allow us to do other outdoor events like the Illuminated Walk in the fall and our donor house parties. We are hoping to engage our membership more robustly this year-- starting with the Annual Membership Meeting-- and to continue our fundraising and communication with the 2<sup>nd</sup> Annual Seeds of Hope Campaign, Summer Member Picnic, Bus Tour of our properties, the Illuminated Walk, our House Parties and much more.

**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

### Statement of Progress 2021

Currently, our organization does not have any openings and we have filled all of our necessary positions. 65% of interviewees were people of color and our diversity has improved since 2020.

Our CEO is a board member at MACDC which is the statewide organization that manages all of the Community Development Corporations. We partner with Just A Start on a grant program with First Source and we network with other CDCs on many advocacy initiatives

We have also participated in the TOPA & Real Estate Transfer Fee coalition in hopes to obtain funding that will further help us develop real estate in the future.

### **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.*

### Statement of Progress 2021

This has been a major priority of the new CEO, who continues to update and modernize all of SCC's systems. We continue our weekly all-staff department meetings, as well as monthly department reports and presentations to the Board. We have continued improving our use of technology systems, and this winter began to integrate our email marketing and communications with our CRM (Salesforce) and with EventBrite to streamline invitation and attendance tracking for SCC's Annual Meeting. We hope this will introduce even more efficiency into our recordkeeping. Our new website continues to be optimized for client needs, and we have had success with our digital housing application.

- 3. Describe one accomplishment over the past year of which your organization is proud. (10 points)**

**2021 Response:**

While Covid's effect on daily life oscillated throughout 2021, our top-notch staff stayed adaptable, flexible, and continued with their phenomenal assistance to the community. Our staff changed a lot throughout the year, with new positions hired. We continue to be impressed with and proud of our staff's ability to work hard and support each other and the community, whether remote or in person, and while dealing with the ongoing stress of the continued pandemic.

We are particularly proud of the Asset Building team's ability to translate the FTHB and other financial literacy curricula to an online format while preserving the participatory pedagogy that distinguishes SCC's financial education from any other in the area. We are also pleased to have won more grant funding than ever this year, in part thanks to our full-time Development Manager, as well as the teamwork of the entire staff to put together strong grant applications and reports. And finally, we are proud of the significant improvements made to SCC as a whole over the past two years, including increased transparency and inter-departmental communication; streamlined and more efficient, modernized systems; staff support; and improved financial support which undergirds all our programs and services for clients and residents.

**4. Describe your engagement/outreach to stakeholders and residents over the past year. Identify the activities and quantify the events. (10 points)**

**2021 Response:**

2021 continued the challenges brought on by the pandemic in reaching people. However, SCC successfully adapted to a hybrid work setting, where clients were able to meet staff people in person when required. We continued our popular virtual Networking Café, and offered our First Time Homebuyer classes online, updating our curriculum to a dynamic digital format. We hosted two online forums – one on affordable housing and one on racial equity and inclusion, as well as co-hosting a Mayoral Debate. We hosted an outdoor screening of the SCC documentary about our work in the community. This powerful film has already strengthened our storytelling and has become a compelling evergreen fundraising tool for SCC. We continue to communicate quarterly with our members via our newsletters. We also hired a full-time Community Engagement Specialist, who has been working hard to help tenants with housing issues and SHERA and RAFT applications.

Unfortunately, the continued Covid-19 pandemic did not allow us to do other outdoor events like the Illuminated Walk in the fall and our donor house parties. We are hoping to engage our membership more robustly this year-- starting with the Annual Membership Meeting-- and to continue our fundraising and communication with the 2<sup>nd</sup> Annual Seeds of Hope Campaign, Summer Member Picnic, Bus Tour of our properties, the Illuminated Walk, our House Parties and much more.

**Part 2:**

**1. Adequate utilization (Part 2 of application completed) of previous credit awards may be demonstrated by reporting the amount of credits utilized versus awarded (information subject to**

verification by DHCD), discussion of funds raised, to-date, as a result of CITC, discussion of donor pipeline and/or changes in the Community Partner's donor pool. Specific donor lists should not be included in the response. (30 points)

**2021 Response:**

We raised \$352,164.19 and utilized all our credits in 2021. It was also the first ever year that we did a Spring fundraising campaign – Seeds of Hope, which brought in some money earlier than our usual end-of year fundraising. This will become an annual campaign. While we had fewer CITC donors in 2021, the average amount of contributions was almost 50% higher: 76 donors gave an average of \$4,633.74. The lower number of donors could reflect ongoing economic effects of the pandemic, while the higher average contribution could indicate that well-off community members and corporate donors alike understand the value of affordable housing integrated throughout an area. Our dedicated, full-time Development Manager and donor- focused CEO continue to develop and foster strong banking and corporate relationships. Donor appreciation consists of personal phone call, emails, and check-ins, written thank you letters, house parties, and thank you swag.