

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

Since 1969, Somerville Community Corporation has served the City of Somerville and its residents. SCC focuses all of its resources, on the central question of sustaining affordability and livability for the lower income two thirds of the population, the recent immigrants and generational descendants of the earlier immigrants.

Somerville is a diverse and divided city of 76,000 residents, with an upwardly mobile and gentrifying community occupying districts of the city, largely in the western half; and a significant percentage of its population with incomes below AMI located primarily in the eastern half. For decades, Somerville had been home to low income and working class immigrant families, mostly from Ireland, Italy, Greece, Portugal and the Portuguese Azores. Somerville suffered the obvious evidences of disinvestment and physical deterioration that most urban core cities suffered across the country, but affordability of the housing stock, for both owners and renters, was not among the community's concerns. Beginning in the 1980s, however, and coinciding with the opening of the MBTA Red Line extension from Harvard Square, Cambridge through Porter and Davis Squares to Alewife, Somerville's housing market and demographics changed rapidly and severely.

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

In 2007-08, SCC worked with Reconnecting America to produce the "Somerville Equitable Transit-Oriented Development Strategy" report as a first major step to understand the potential impact of the MBTA Green Line Extension in Somerville. Among other findings, the report found that, in the 2000 census, while Somerville as a whole had a median income that was only 88% of the regional median, neighborhoods around the Red Line stations were already **6% above** the regional median income, **21% above** the City median. The attached map showing median household incomes by census tracts from the 2007-2011 American Community Surveys (ACS) shows more recent evidence of this trend toward an economically bifurcated City. The map shows that Somerville has 9 census tracts below \$67,000 median household income, and 9 census tracts above \$70,000 median income; four of the low income census tracts are at or below \$46,000 median income, with the lowest-income 3 census tracts having median incomes at less than half the highest-income 2 census tracts.

Recent reports utilizing American Community Surveys data show that 43% of Somerville residents are classified as cost burdened, as they pay more than 35% of their income on housing (1/6 of the population is considered severely cost burdened, paying over 50% of their income on housing). 10.5% of all residents live below the federal poverty level. Somerville's population is 31% people of color, compared to 25% regionally, and 26.8% of the population is foreign born. In the schools, 51% of the students speak a language other than English at home, compared to 16.7% state wide. Immigrants earn 29.8% less than native born residents. The high school dropout rate is 18.6% in Somerville, compared to 8.2% statewide. At the same time, 52% of Somerville's workforce has a bachelor's degree or higher. 34% of the workforce has a high school degree or less, and are nearly twice as likely (13% vs. 5-8%) to be unemployed than those with a bachelor's degree or higher. In summary, Somerville's diverse population reflects two ends of a workforce spectrum, with low income and immigrant workers either under-employed, or working in low paying jobs, while a significant portion of the population is highly educated and eligible for higher paid positions.

The City of Somerville faces unprecedented transformation in the next 2 decades, which presents potential opportunity to Somerville's residents if managed well. The City's Comprehensive Plan – SomerVision – projects 30,000 new jobs, 6000 new housing units (with 1200 of them permanently affordable) and 125 new acres of publicly available open space in the next 20 years. The Metropolitan Area Planning Council projects 74% job growth in Somerville compared to 8% growth in the region. Over 10 million square feet of new commercial and residential development is anticipated. The \$1.2 Billion Green Line Extension will be built out, adding 5 new light rail stations in Somerville and 2 additional stations on Somerville's border. Already at Assembly Square, 450 units of new housing, 500,000 square feet of retail and office space, and the new Orange Line MBTA station are all under construction and will be completed this year. Recently, Partners Health Care and the City of Somerville announced that Partners will consolidate its administrative operations, bringing 4500 employees to a new 600,000 square foot office complex, also at Assembly Square.

While SCC aims to benefit the entire community through its community development model, its most important work is directly with the segment of the community most at risk to address critical issues of equity in the face of the tremendous transformation facing the City—and region—today. SCC board and staff members, as well as SCC's overall membership, has vigilantly concentrated its work to counteract market-driven displacement pressures. As a result of the seismic changes described above and in anticipation of continuing transformation, SCC adheres to the following intended impact statement, adopted by the SCC Board in 2008:

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

Section 2: Involvement of community residents and stakeholders

SCC is a membership-based organization with nearly 400 formal members, and 1500 constituents. While we are proud of our membership base, it is the level of activity and

commitment for which we carry the most pride. Since 2001, SCC has been a community development corporation strongly rooted in grassroots community *organizing* practice, resulting in a number of successful campaigns over the years to influence affordable housing policy and neighborhood quality of life improvements. Since 2005, SCC has also built a strong practice of participatory community *planning* originally with our East Somerville Initiative, concentrated in that neighborhood and later the Community Corridor Planning project along the pathway of the anticipated MBTA Green Line Extension.

As a result of our community organizing and planning work, SCC enjoys the robust participation of members in a range of issue-based committees, community planning steering committees, and neighborhood land use planning groups. SCC's annual meetings are routinely attended by approximately 250 members. We also conduct an annual summer member meeting with approximately 100 members participating in a range of workshops and whole group sessions. SCC has the capacity to quickly mobilize 75-100 members on important issues in Somerville and for SCC – for example, we recruited 100 residents to a speakout that launched our Jobs for Somerville committee and campaign in October 2011 and 80 residents for a rally in July 2012 declaring that it is “Everyone’s Somerville,” pushing back at a small but aggressive anti-affordable housing effort in Union Square. We have a base of 60 active leaders who participate on a regular basis in our core committees and actions.

In 2008 SCC launched our Leadership Development Institute, an intensive 4 half-day training program for 20 emerging community leaders, a program we’ve run annually for 20-25 new leaders every year since. We also sponsor 4-5 one-time leadership development workshops per year on topics ranging from public speaking to understanding economic injustice. As we have rolled out an increasing number of financial asset building programs in recent years for low income individuals and families, we simultaneously piloted our “From Crisis to Leadership” program, which connects clients from our asset building programs to SCC’s organizing and leadership building work. Additionally, we are regional leaders in conducting simultaneous interpretation in 4 languages (Spanish, Portuguese, Haitian Kreyol and English). In our model, everyone wears headsets so that each participant can speak in their first language.

Leadership development is a driving force of our work, and is critical to our success as an organization attempting to prevent people from getting displaced from Somerville. We strive to be creative in our approach, and to implement a variety of strategies to inspire people to engage with our work. Our first step is to cross barriers and reach people who usually do not get involved. We do this through door knocking and personal one to one visits, making effort to match visits (staff, interns, and leaders) by language. We provide child-care, food, and language interpretation, ideally simultaneous, at all meetings. We emphasize the importance of building relationships between members, and encourage people to share their personal stories. But it is not enough to simply engage people to participate; our goal is to work with the people from our target population, i.e. those who are often most disenfranchised, to become leaders who shape and guide our equity agenda. This works particularly well with people who become active on our issues committees and campaigns (jobs, housing, Link Somerville, and land use planning). At this level, our organizing and planning team works with individuals to stretch beyond their comfort zone to develop and practice new skills, such as making public testimony, turning out people to events, engaging in power analyses, analyzing relevant data, contacting public

officials, and creating actions to move an agenda forward. As leaders become stronger, we count on them to take on organizational roles of leadership, such as becoming a co-chair of a committee, joining SCC Board of Directors, or helping to teach leadership skills in workshops and trainings.

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

Section 3: Plan goals

Somerville Community Corporation is launching its 3 Year Strategic Plan next month, after a 8 month planning process with Board and Staff to arrive at these goals. The intent of this Strategic Planning process was to refresh the last 3 Year Strategic Plan, and to derive new and/or updated goals and actions based on an extensive analysis of the key questions we need to address to achieve our intended impact.

The City of Somerville is undergoing tremendous transformation as described in Section 1. Our overarching goal as Somerville's only Community Development Corporation, is to contribute to and influence this transformation so that the end result leaves 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 Strategic Plan, sets out to find positive solutions to this question. SCC includes the following 5 goals in its Strategic Plan:

- Goal #1: Increase the amount and stabilize the stock of affordable, family sized rental and homeownership housing in Somerville.
- Goal #2: Create and support initiatives that enhance the economic well-being of low and moderate income Somerville residents.
- Goal #3: Magnify, sharpen, and expand SCC's impact on areas of the city most prone to change, to result in more equitable outcomes.
- Goal #4: Expand our Membership Base and invest in the development of leaders in SCC and in the community.
- Goal #5: Broaden and strengthen SCC's operations, internal policies and financial position in order to support and facilitate SCC's achievement of its intended impact.

The goals included in SCC's strategic plan address SCC's overarching mission to make sure people of all incomes can afford to live in Somerville. Right now, 44% of Somerville's renters are considered house burdened, meaning they pay more than 30% of their household income on housing, and half of those households pay more than 50% on housing. Meanwhile, Somerville is experiencing tremendous upward market pressures. According to projections from MAPC's newly released study, "Dimensions of Displacement", 5 of the 7 proposed new Green Line stations walk shed (an area defined as .5 mile around the transit station) may experience rent increases between 25% and 67%.

SCC's Goal 1 - to preserve and produce affordable housing, both through its own work and by influencing municipal policies that result in more affordable housing - is a fundamental means of helping low income families live in Somerville. At the same time, through Goal 2, SCC helps low income residents to become financially stable, build assets, and access good jobs. By working on both angles of this financial picture, the goal is to help insure that people of lower economic means have viable opportunities to live in Somerville. Goal 3 directs SCC to pay close attention to neighborhoods of Somerville most prone to change, as these are the areas where low income residents are most at risk. Our Goal 4, to engage a growing body of members and leaders - with a particular emphasis on lower income residents, immigrants, and people of color- is an effective means of lifting up the importance of the first 2 goals city-wide, and to further strengthen a diverse vibrant community by encouraging people to take an active role and voice in what happens. Finally, Goal 5 guides SCC to increase our capacity and impact in order to attain our larger mission to make sure people of all incomes can live and thrive in Somerville.

Each of these goals also benefits the whole community. Through SCC's 8+ years of community planning and engagement, as well as through the City's comprehensive planning process, community members have consistently prioritized diversity as a core value in Somerville. Over the last 5 years, SCC has engaged over 1000 residents to create a list of core principles for the new transit corridors (with Green Line and Orange Line extensions, a walk shed that will reach over 50% of Somerville residents). These principles include access to affordable housing and good jobs (among others) as high priorities. If SCC is able to attain its stated goals, we will address community priorities expressed broadly by residents, both through our community planning work and through the City's SomerVision. Because SCC is dedicated to a grassroots approach of working with community members through organizing and community planning, the outcome of our work promises to directly reflect the ideas and values expressed by the community, which is an important benefit to the whole community. SCC has a 45 year track record of working within Somerville, and is uniquely able to effectively connect all sectors of the population. If successful in the pursuit of our goals, as a result of SCC's development, services, and through organizing for key policies in the next 3 years, we will see over 100 units of affordable housing developed by SCC; new City-adopted policies to require higher levels of affordable housing to get the City closer to its goal of 1200 units by 2030; \$3 million additional dollars added to the Affordable Housing Trust Fund; and \$1 million added to the Jobs Trust Fund. In addition, through SCC's direct work with residents, over 500 residents will become more financially stable or be able to increase their assets; at least 250 Somerville residents placed with local employers; and hundreds of community members engaged in SCC efforts, as well participating in and influencing city planning

Section 4: Activities to be undertaken

Goal #1: Increase the amount and stabilize the stock of affordable, family sized rental and homeownership housing in Somerville.

For this goal, the following actions will impact Somerville, and in particular, the low income community, by raising necessary capital to acquire and develop affordable housing; establishing new city policies resulting in a higher number of family sized units for low and moderate income residents, and preserving existing affordable housing for renters and owners.

1. Develop partnerships with other quality developers (for-profit and non-profit) to enable SCC to increase acquisition, financing, and production of affordable housing in Somerville.
2. Create a small property (2-4 family) acquisition and moderate rehabilitation homeownership program with City of Somerville, by SCC and/or interested private parties, to secure 15-20 affordable homeownership and rental units annually
3. Establish permanent and working capital for acquisition and to leverage favorable borrowing terms.
4. Acquire expiring use properties, or work with tenants to encourage landlords to renew expiring use contracts.
5. Organize and create policies that promote affordability for public disposition properties and increase inclusionary zoning requirements, especially focusing on family-sized units, and deeper affordability.
6. Cultivate additional new sources of funding support for affordable housing, such as through the City's newly adopted CPA.

Outcomes Over 3 Years
<ul style="list-style-type: none">• 60 units (rental + ownership) of new production, mixed income affordable housing plus commercial• 50 units of protected affordable housing through acquisition and recycling of small properties• Revised Inclusionary Zoning to a 15% affordability requirement city wide, plus new formulas to provide incentives for deep affordability and family sized units• Raised \$1.5 million for real estate reserve fund• Zero loss of expiring use housing• City policy established to require 20% of disposition of public properties for housing be dedicated affordable• Increase dollars going into City Affordable Housing Trust Fund by \$1 Million per year (from sources such as CPA, Linkage Fee, etc.)• At least 20% of the anticipated 1000 new housing units are affordable, in accordance with the SomerVision goal

Goal #2: Create and support initiatives that enhance the economic well-being of low and moderate income Somerville residents.

For this goal, the following actions will enable Somerville low and moderate income residents to improve their financial stability and have access to jobs locally, which in turn will help stabilize this sector of the community in Somerville. With more resources, shorter commute time, and better financial management, residents will have more opportunity to enjoy their family, community, and local economy.

1. Organize to establish Jobs Linkage Fee that would be deposited into a Jobs Trust Fund to be used for training and connecting Somerville workers with local jobs.
2. Organize to establish First Source Hiring agreements with City, MassDOT and employers for “good” jobs.
3. Implement and run a First Source program to connect workers with training and “good” job opportunities.
4. Consider supporting small businesses, particularly those run by or providing decent jobs for our target constituents,
5. Support Somerville residents who are at financial risk of displacement in increasing their financial stability through financial literacy classes, First Time Home Buyer program, foreclosure prevention work, Individual Development Accounts, and ongoing case management.

Outcomes Over 3 Years
<ul style="list-style-type: none">• State Legislature passes Home Rule Petition enabling Jobs Linkage Fee and Trust Fund; Jobs Linkage Fee at \$1.40 per square foot passed by Board of Alderman.• As a result of above, at least \$800,000 contributed to Jobs Trust Fund• 15-20% of new jobs in Somerville go to Somerville residents, with long term goal of 30%• 10% of new jobs in Somerville go to women and minority workers• 750 people participate in First Source Program; of these, 250 placed into local jobs• MOU in place with MassDOT/MBTA to connect GLX construction jobs in Somerville with local workers, as well as to create Access and Opportunity Committee• 1620 clients served through Asset Building programs (financial literacy, FTHB, foreclosure prevention, IDA, case management)• 480 people improve their household finances, as measured by creation of realistic household budget, increases in income, and/or increases in credit score• 900 people self-report a significant improvement in their understanding of the steps in home buying and feel more prepared to buy a home after participating in FTHB Seminar• 180 people self-report an improvement in their understanding of basic financial literacy in post-class evaluations

Goal #3: Magnify, sharpen, and expand SCC's impact on areas of the city most prone to change, to result in more equitable outcomes.

These actions direct SCC to invest in strategies that have a targeted focus on the parts of the city where risk of displacement for vulnerable populations is high. Because of the pace of activity, it is easy to play a reactive role as private and public sectors move quickly to transform and

develop the land; these actions give SCC direct mechanisms for acting proactively, and gaining a seat at the table in directly influencing the ways in which these areas change.

1. Establish a plan and vision for SCC’s work in neighborhoods most prone to change that will guide us in future years.
2. Partner with private developers and other organizations to build value-added projects.
3. Organize to get higher Inclusionary Zoning in these districts
4. Establish community benefits agreements among community, City, and private developers/employers, to set aside local jobs, affordable housing, or employer owned housing.
5. Explore opportunities to support or create commercial and economic development, such as through mixed-use properties, establishing incubators for low income businesses, and local business occupancy preferences.
6. Engage neighbors in targeted areas in participatory land use planning.

Outcomes
<ul style="list-style-type: none"> • 80% of SCC’s new development will take place in areas most prone to change • In city transformation and revitalization districts, zoning allows for higher affordability requirements (above 15%) • SCC works with community members to create, approve, and begin implementing an organizational vision and plan for SCC’s work in areas prone to change • SCC works with City and private developers/employers to establish at least one CBA • SCC leads process to evaluate and decide whether or not to pursue a strategy of commercial development with local businesses in these target areas • SCC hosts 2-5 land use planning workshops per year, and engages 50 people per year in ongoing land use planning work

Goal #4: Expand our Membership Base and invest in the development of leaders in SCC and in the community.

Goal #5: Broaden and strengthen SCC's operations, internal policies and financial position in order to support and facilitate SCC's achievement of its intended impact.

Both of these goals are intended to strengthen the way in which SCC works internally and with its ever growing base of members and leaders. If we are successful in building our capacity, which includes a strong and diverse base of members who lead the organization, as well as the financial and staff capacity, we will move more swiftly toward achieving our intended impact. To do this well, we will invest in building leaders, improving our cultural competency, communicating our message broadly, and raising the capital we need for staff, development and resources. The following actions will move us in this direction:

1. Continue to run the Leadership Development Institute, both Leadership Basics Institute (4 half day sessions), and 4-6 workshops per year.
2. Establish clear pathways for volunteers to lend their skills and help.
3. Increase base of members and active leaders

4. Invest in popular education tools, data and technology to deepen means of involvement and analysis to inform ongoing work and goals.
5. Encourage SCC tenants to become active leaders and to participate in other SCC programs.
6. Rebuild strong Membership Committee to engage members in SCC activities and events throughout the year.
7. Design and carry out a financial plan for both revenues and expenses that allows SCC to carry out these goals and objectives, and become a sustainable organization, including formalizing a donor development program, developing real estate capital funds, and broadening base of foundation grants and contracts.
8. Expand SCC's public profile and visibility by developing a communications strategy that results in the creation of a universal message, image, and materials as well as a plan for delivering these to our targeted audiences.
9. Create an organizational diversity and cultural competency analysis and action for all levels of the organization.
10. Update and review organizational operations, policies and procedures, including mechanism to review SCC's progress towards meeting goals in Strategic Plan.
11. Develop a system of criteria to be used to guide organizational decisions, such as real estate development, new program work, and general equity standards.

Outcomes For 3 Year Period
<ul style="list-style-type: none"> • 70 people graduate from LDI Basics; 100+ people participate in supplementary LDI workshops • Increase formal membership to 500 • Engage 1000 constituents per year through SCC organizing, activities, and events • Increase active leadership base (leaders who are actively involved in campaigns and committees) from 60 to 100 people per year • 30% of SCC tenants participate in SCC activities • Financial plan created, adopted, and implemented, including the development of at least \$1 Million in a working capital fund • Communications Strategy created, adopted and implemented, with updated brand, messaging, and collateral; SCC increases media hits to x per year • Equity Platform adopted and in use, with endorsement from 50+ stakeholders, and 10 identified community partners • Criteria established and in use to evaluate new development and new work

Section 5: How success will be measured and/or evaluated

SCC will track its progress to measure its success towards achieving the stated intended impact through a variety of methods. First, SCC has and will continue to align its goals with existing data assessments. During the last two years, SCC worked in partnership with Metropolitan Area Planning Council through a Sustainable Communities grant to create a baseline of data evaluating current affordable housing and market conditions in Somerville as part of the “Dimensions of Displacement” report. While this analysis provides a springboard for shaping strategy and policy, it is also intended to establish a template for data collection over time so that we can follow market changes and update the inventory of affordable housing. This will help us measure the impact of our housing production and influence on city development policies within the greater context of the market, as well as to help us refine our strategy as we go. SCC is also working with MAPC to release a companion study on economic development, which will serve a similar purpose of creating a baseline data assessment of economic development factors, with an analysis on the projected impact of new development as Somerville faces a wave of transformation. SCC staff and board worked with this data in the early stages of Strategic Planning to establish a shared understanding for data trends relevant to our past and future work.

In addition to working with these data reports, SCC is in the practice of working with interns and graduate students, and our members to gather and analyze data to help answer specific questions facing SCC and its membership. Currently, we are working with a graduate student from Northeastern University Dukakis Center for Public Policy to conduct a variety of data assessments, create maps, and bundle our data. This spring, a team of graduate students from Tufts University Urban and Environmental Policy will be exploring the past, present and future implications of economic transformation and transit on local businesses. We also employ a popular education approach to connecting our leaders with data through workshops, data collection, and interactive mapping. In this way, members from all backgrounds have an opportunity to study and respond to the data with staff in a way that helps inform and refine the direction of work, and therefore brings us closer to realizing the goals that are of highest priority to our constituents.

SCC will also measure its success by quantifying our results in relation to the metrics we have established through our goals in our organizational strategic plan, and as written in this Community Investment Plan. We have a list of factors we track, including:

- number of housing units produced and the level of affordability of that housing;
- number of applicants for existing housing;
- amount of money raised dedicated to our priority issues;
- which policies get passed and the quantifiable results stemming from these;
- amount of affordable housing and jobs in targeted areas of change, such as TOD districts;
- number of people we connect with jobs;
- number of people who participate in our programs and activities, as well as who take part in city public hearings and meetings as a result of their participation with SCC;
- number of participants who go on to take leadership roles;
- number of people who reach asset building goals, such as buying a home, increasing savings, reducing debt and improving credit scores.

To make sure we are connecting our numeric accomplishments with our overarching goals and intended impact to minimize displacement, it is important to connect our goals with those of the City and other partners. Since 2008, SCC has led a community planning initiative, the Community Corridor Planning (CCP) initiative, to focus on new transit corridors in Somerville with other community partners, including Groundwork Somerville, Somerville Transportation Equity Partnership, and Friends of the Community Path. SCC works with a steering committee, Link Somerville, made up of residents and partners from the community, to continue to connect the work of the partners and the City toward a shared outcome of equity resting on the core principles established through CCP. Link Somerville will soon unveil its Equity Platform, which provides us with an additional tool to track our progress toward meeting our goals, along with our partners. While SCC focuses primarily on affordability, economic development, and community participation, other partners list goals for open space, transportation access, local businesses and environmental justice. The Equity Platform lists specific, measurable goals shared by this base of partners toward equitable outcomes that align with the vision and principles established by the community. This document also ties these goals to the City's SomerVision—a Comprehensive Plan that sets City goals for the next 20 years, particularly those with explicit equitable outcomes. SCC and its partners through Link Somerville, will use the Equity Platform to seek endorsement and commitment from other stakeholders to work toward the expressed goals. It will be used as a public report card over time to monitor our collective progress toward the shared set of goals. While these goals are broader and less specific than all of the goals included in SCC's strategic plan, there is substantial overlap on SCC's top priorities, and therefore will help us publicly measure our progress over time.

Finally, SCC engages its base of members and leaders to evaluate our work on an ongoing basis. The Board of Directors and Staff are charged with annual review of the Strategic Plan to track our progress as we go. We ask participants to evaluate all classes, meetings and events, and use this feedback to modify and improve our subsequent work, which helps us be more effective in working with our members to achieve our goals. SCC has several working committees in charge of moving our work forward, including Real Estate Development Committee; Affordable Housing Organizing Committee; Jobs for Somerville, Membership Committee; Land Use Committee; and Link Somerville. We also hold large member meetings, and quarterly convenings for our active leaders to evaluate our progress, review, craft, and revise our goals and work plans for the months ahead. In this way, we continue to work in a dynamic environment, while still being guided by our overarching goals towards reaching our intended impact. As this 3 year Strategic Plan comes to a close at the end of 2016, we will set into motion a community process through establishing focus groups from different sectors of the community to evaluate our work, and to begin to assess community needs relevant to the following years of SCC's work.

Section 6: Collaborative efforts to support implementation

SCC has a deserved reputation as a collaborative organization, as well as a leader of collaborative efforts in the community. As an organization we work hard to (a) find those areas related to our Intended Impact of combating displacement pressures and working to sustain a vibrant, economically diverse community where SCC can play a unique role that is not otherwise

better. The areas of (1) affordable housing development and policy; (2) financial asset building for low income households; (3) advocating for jobs and access to jobs for low and moderate income people; and (4) advocating for equitable outcomes in all physical and economic development, programs and policies in Somerville, and (5) grassroots organizing, participatory planning, and leadership development are the five areas where SCC plays a singular and leading role in the community.

SCC's clarity about our own appropriate role(s) in the community helps us to form, lead, and participate in a range of collaborative efforts where the collaborators share a common goal and can divide up roles appropriately. For example, SCC has served as the lead organization for the Great Neighborhoods Initiative in Somerville, a program of the Mass. Smart Growth Alliance. SCC leads, convenes and serves as fiscal conduit for that collaborative, but Groundwork Somerville, the Somerville Transportation Equity Partnership, Somerville Health Agenda, and Friends of the Community Path all play vital roles in the overall Initiative. Similarly, SCC formed and has led a collaborative of several organizations working to establish a "Financial Opportunity Center" in Somerville, including The Career Place, SCALE, The Welcome Project and LIFT. However, SCC is not seeking to replicate the career counseling and job development services provided by The Career Place, nor the adult education, ESOL and GED preparation provided by SCALE. Instead, SCC's model is to provide the services and coordination needed – in this case, comprehensive intake, case management and financial education and counseling – and count on collaborating partners to provide the services they are better equipped to provide.

Our clarity of vision and purpose led SCC to recognize in 2011 that, despite SCC's 25-year track record in homelessness prevention work, the Somerville Homeless Coalition was better equipped to carry on homelessness prevention work into the future. Enabling a transition of some of SCC's work and funding support to the Homeless Coalition would have the additional benefit of freeing up SCC's capacity to further the development of our Asset Building programs, as SCC is the leading, and often the only, organization in Somerville providing those services. SCC maintains a very close referral and working relationship with the Somerville Homeless Coalition to serve Somerville residents needing homelessness prevention assistance, as many residents in need of such services continue to make their way to SCC's door.

The core groups participating in Link Somerville are supporting each partner's independent and shared projects. The Network is deepening by planning projects that serve multiple needs simultaneously such as increasing jobs, housing and green space. For example, Link Somerville has supported Groundwork Somerville's Urban Agriculture initiative, the Urban Ambassadors program, and the opening of the South Street farm. This network also worked closely together to follow STEP's lead in getting state commitment for the Green Line Extension.

Link Somerville has played an important role in facilitating community planning and place-making initiatives, including: Project for Public Spaces Workshop in East Somerville; 181/197 Washington Street Design charette with SCC and Cathartes Private Investments; Draw 7 Community Design Meeting with GWS; and Design and Visioning Workshop at Brick Bottom with Brick Bottom Artist Association.

Other current collaborative efforts include:

- SCC’s collaboration with Mayor Curtatone’s administration on the City’s SomerVision plan, to pass the Community Preservation Act in 2012, and on the recent efforts to both increase the Housing Linkage fee and to establish a new Jobs Linkage fee and corresponding Jobs Trust to administer the funds generated by the new fee;
- Community representatives from Somerville, Medford, and Cambridge, along with MassDOT, MBTA, organized labor, contractors and sub-contractors, legislators and City representatives are working in partnership as part of a Liaison Committee to set and monitor hiring goals and means of achieving them throughout the span of GLX construction;
- SCC and The Career Place have been the two key participants in the City of Somerville-led proposal to the Federal Reserve Bank of Boston’s Working Cities Challenge grant competition, submitting a proposal modeled after SCC’s Thrive Center approach to connecting local workers to jobs, and are joining forces to launch a first source hiring model as part of the THRIVE consortium
- SCC and The Welcome Project have collaborated to engage students of The Welcome Project’s ESOL classes in SCC’s leadership training.

Finally, SCC collaborates in a number of ways on a regional basis, in addition to our local collaboration work. SCC as an organization, as well as through specific staff members, is an active participant in Mass. Association of CDC programs, MAPC’s Sustainable Communities Consortium, the Mass. Smart Growth Alliance’s Great Neighborhoods Initiative, Action! For Regional Equity, and the MIDAS Collaborative, among others.

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

As described in Section 5, SCC is working with community partners to share a set of goals through the Equity Platform. The group of partners SCC has worked with through CCP and Link Somerville are also part of the Great Neighborhoods Initiative. Through this network of partners, we have a collective vision of making sure Somerville grows and thrives in a way that is consistent with community values of environmental justice, diversity, affordability, access to good jobs, transportation, and open space. Because no single entity can tackle all of these priorities, we understand the value of sharing a collective agenda that each of the partners can reinforce. While each organization takes a leadership role in specific issue areas, partnering organizations support the work by engaging their own base of community members to attend important public meetings, hearings or rallies, join in letter writing campaigns to public entities, sharing resources, and keeping our organizations and constituencies informed. In some cases, partnering organizations have opportunities to work together on specific projects, such as building affordable housing with a plan for green space programming, or working together to pass Community Preservation Act in Somerville.

This collective work also feeds well into the City of Somerville’s approach to comprehensive planning. Each of our organizations have been active in City planning and design processes, which has had a strong influence on the City’s SomerVision, passed in 2012, and now underway in implementation. Many of our own goals are imbedded in SomerVision. We continue to work

together and with the City to push for implementation of practices and policies that move the City closer to realizing the goals included in the SomerVision. The Equity Platform, as described in Section 5, explicitly connects the goals from SomerVision that reflect the equity priorities shared by our members and partners through Link Somerville and the Great Neighborhoods Initiative. Already this approach has come to fruition. For example, our partners worked closely with the Mayor of Somerville to push for and pass CPA in 2012; this year we worked closely with the City to successfully promote increasing the City's Housing Linkage Fee, and is currently pursuing adoption of a Jobs Linkage Fee; SCC is also working closely with the City to establish First Source Hiring in Somerville to connect Somerville residents with new jobs in Somerville.

Section 8: Financing strategy

SCC seeks a mix of revenues to support its annual and ongoing operations. Our mix of funding support includes (a) private grants; (b) earned income, principally from real estate development and asset management fees; (c) public contracts and grants – primarily for SCC's Mediation Program; and (d) corporate and individual contributions. Following a period of financial difficulty in 2007-08, coinciding with the dramatic downturn in the economy, especially for real estate, SCC began a series of measures to establish greater financial stability for the organization:

- Implementing a rigorous and closely managed monthly cash flow projection going out 2-3 years;
- Implementing a board-adopted measure to dedicate 10% of all earned developers fees, beginning July 1, 2008, into a reserve fund;
- Revising our tracking and staff assignments for grant fund raising; and
- Implementing, through attrition and layoff, a reduced staffing level, supportable by our financial projections.

As a result of these measures, and our ongoing efforts to implement them, SCC's financial condition has steadily improved, and our financial performance has increasingly matched projections. During the period from late 2011 to early 2013, SCC retired \$325,000 in working capital debt and built an internal reserve fund of \$225,000. As we complete St. Polycarp Village early this year, that reserve fund is enabling SCC to be aggressive players in the market as we aim to achieve some of our housing production and preservation goals.

SCC has been able to successfully achieve a regular enough pipeline of real estate development activity over the past several years that we can rely on a regular, specific level of revenue from that business line. Our current projections include known, projected fees from a project currently in construction (St. Polycarp Phase III) for 2014, and a project for which we are currently seeking Planning Board approval (181-97 Washington Street), for which we are projecting fee revenues to begin by 2015. In addition, SCC has an option on a property in East Somerville, for which we will submit a proposal in the anticipated State Homeownership funding round this spring. We are also working to secure site control on at least two more larger properties this year for development in 2015-2017.

On the grants side, SCC has been able to match projections with actual revenues generated by pursuing an aggressive solicitation effort and growing the number of funders from whom we seek grants, and achieving several multi-year grants that help give us a secure base of grant-funding at the outset of SCC's fiscal year. Our grant revenue increased from \$316,000 in 2011 to \$461,000 in 2013.

Having secured stable funding streams in our other revenue lines, SCC is now seeking to grow the revenue we raise from corporate and individual donors. Over the past several years, SCC has raised \$40-50,000 per year from these sources, primarily through our Annual Fund Appeal. Since the passage of the Community Investment Tax Credit legislation in 2012, SCC has been developing several strategies to grow our base of donors, and to approach existing donors in new ways. Our current plans for 2014 include:

- Launching a donor campaign among the many new businesses developing or opening operations at Assembly Square, including Federal Realty Investment Trust, Partners Health Care, Legoland, and AMC Theatres; SCC has already been working with these companies to assist their hiring of local residents;
- Working with the City of Somerville to create a pool of funds through charitable contributions to assist with the recycling of 2-4-family properties for permanent affordability;
- Building upon our successful work in recent years to generate contributions from local banks, realtors, and others in support of our Asset Building programs;
- Building a base of donors to support the establishment of a new physical center to house the Thrive programs delivered by SCC and its partners;
- Augmenting the contributions of steady donors to SCC's Annual Appeal, the 2012 Community Preservation Act campaign, and the annual Save Our Homes Walk SCC helped launch in 2004.

While our proposal clearly discusses the displacement and equity challenges inherent in our rapidly changing community, those changes also bring new opportunities for generating partners and donors among the many new developers and businesses coming to Somerville. Utilizing tax credits from the new CITC, SCC would be ideally positioned to take advantage of this aspect of the major changes taking place in our city.

Section 9: History, track record and Sustainable Development

Founded in 1969, Somerville Community Corporation (SCC) is a membership organization with a mission to develop and preserve affordable housing, offer services and programs, and build a collective voice through community organizing and planning in order to realize a stable, diverse, and affordable community. In its 44-year history, SCC has completed over 20 affordable housing projects, resulting in more than 100 ownership units and 184 rental units owned by SCC. . We have helped thousands of adults and young people gain security through counseling, referral and mediation programs. We have mobilized hundreds of residents to win policy campaigns around affordable housing, jobs, neighborhood equity, and access to city amenities.

In our real estate development work, we completed and tenanted the 8 units of permanent housing for formerly homeless families at 75 Cross Street. We are near completion of the 3rd and final phase of new construction at Saint Polycarp Village – 31 affordable rental apartments, for which over 1100 families were entered into a lottery conducted just this week. The former St. Polycarp Catholic parish is now a new Village with 84 affordable apartments, 3 street level commercial spaces, 12 units of transitional housing for young mothers and their children, the Missionary Church of the Haitian Community, a multi-purpose community room, and outdoor play space. Next week we will submit to the Somerville Planning Board a joint venture plan, with Cathartes Private Investment, to construct two buildings with a total of 65 new units of housing, 39 of them affordable, at 181-197 Washington Street, two blocks from the first new stop on the Green Line Extension.

On the community organizing and planning front, we continued to lead the Community Corridor Planning (CCP) initiative, now called LinkSomerville, in coalition with three other Somerville nonprofits, which has engaged over 1000 residents in its 5+ year history, resulting in 11 Core Principles, an Action Plan that is updated regularly, the soon to be released Equity Platform, and the ongoing work to execute the plan by community leaders. To this end, we have engaged in organizing campaigns to work with tenants to preserve affordable housing; mobilized over 100 people for various rallies and events to support new affordable housing through “Everyone’s Somerville”; organized to persuade the Board of Alderman to pass an increase of the Housing Linkage Fee from \$3.91 per square foot over 30,000 square feet to what is now \$5.15 per square foot; led and won a ballot initiative campaign to enact the Community Preservation Act in Somerville (with over 70% margin); and become leaders in the movement to promote local hiring in Somerville.

As a result of our community organizing efforts around local jobs, SCC’s Jobs for Somerville Committee gained agreement from Secretary of Transportation Richard Davey and MBTA General Manager Beverly Scott to work with us to create a Memorandum of Understanding that will result in local community workers accessing GLX construction jobs. While still in progress, we are working closely with their team to establish a precedent setting model for close collaboration between MassDOT/MBTA and the community on the jobs front. We also gained the Mayor’s support, in response to SCC’s organizing hundreds of people to support local hiring over the past two years, to establish and implement mechanisms to enable local hiring, such as creating a Jobs Linkage Fee (now under Home Rule petition at the Legislature), and launching a First Source Hiring model. We have also hosted numerous interactive design workshops to engage disenfranchised residents in land use planning, as well as creating the InTeractiveSomerville website to provide another avenue for people to connect.

The SCC Board made a strategic decision in 2012 to partner with the Somerville Homeless Coalition to operate all homelessness prevention programs in Somerville, including those SCC had formerly operated, so that SCC could concentrate on the continued growth of our Asset Building programs. SCC served over 400 people through our newly-branded Thrive Center, via a mix of intensive financial education classes, individual financial counseling, Individual Development Account (IDA) programs, and First Time Homebuyer classes. In addition, with our

partner, The Career Place, SCC began offering career counseling and job development to clients in 2012.

Our Leadership Development Institute is currently in its 6th year, training 22-25 new community leaders annually, as well as reaching 25-50 additional people each year through supplementary training sessions. Each year we have at least 8 nationalities represented in our cohort, and conduct our sessions in 3-4 languages simultaneously, where everyone in the room wears a headset, and can speak in their first language.

SCC, as well as the City of Somerville overall, is strongly committed to the Commonwealth's Sustainable Development Principles, and works to put those Principles into action. Principle #2 could well be written as a component of SCC's mission and strategic plan! As described in this proposal, virtually everything SCC does is wrapped around the central question of equitable sharing of benefits and burdens of development in our community. SCC has been leading, and will continue to lead the call for housing and jobs to reach all segments of the socio-economic spectrum so that low and moderate income residents can share equally in the benefits of new transit, substantial job creation, and housing opportunities in our vibrant urban community.

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

SCC is at the forefront of promoting Inclusionary Housing requirements and Linkage Fees as ways to promote the creation and sustaining of more affordable housing. We have also been leading the effort to give Somerville residents the first and real opportunity to access the thousands of new jobs being created in Somerville. Where there are gaps in providing affordable housing or in connecting local residents to job opportunities, SCC seeks to fill those gaps as the City's premiere affordable housing developer and by partnering to provide a job readiness and training service stream.

SCC's real estate development serves as a model for green, energy and water-efficient development. Our Saint Polycarp Village development features a passive green roof on the Phase 1 building – the first in Somerville – as well as solar thermal and solar photovoltaic panels in each of the three phases. In addition, we also implemented a comprehensive storm water management plan on the entire three acre site. SCC actively engages neighbors of potential projects to help shape the final plans. Our current proposed project at 181 Washington Street stands out as a signature project to incorporate sustainable development principles. The property at 181 Washington Street sits in a prime Transit Oriented Development area, with 2 of the new Green Line stations to be developed within ¼ mile of the property on either side. SCC held 6 public meetings attended by 50-100 people each; talked with 200 neighbors at their door, and hosted a community design workshop to get people's input for the project. This kind of input gave SCC valuable ideas for how to address essential community values that could be incorporated into the project, including green space, ideas for a green roof, pedestrian and bike access, accommodating local businesses, community art, and good jobs, in addition to affordable housing.

The City of Somerville led a community process that resulted in the adoption of SomerVision, a comprehensive 20-year plan for the community. SCC was a strong contributor to the SomerVision plan, and helped organize dozens of residents to participate, including strong representation from the low income and immigrant members of the community who don't typically participate in complex planning processes. SomerVision reflects virtually all the Commonwealth's Sustainable Development Principles, with a special concentration on Equity, Concentrated Development and Mixed Use, Expanding Housing Opportunities, Transportation Choice, and Increasing Job and Business Opportunities.