

AFFORDABLE HOUSING

JOB and ASSET BUILDING

TRANSITIONING  
AREAS

MEMBERSHIP &  
PARTICIPATION

OPERATIONS

**Somerville Community Corporation**

**3 Year Strategic Plan**

**2014-2017**

**May, 2014**

## Executive Summary

Somerville Community Corporation presents its 3 Year Strategic Plan for 2014-2017. This plan refreshes the previous 3 year strategic plan by taking a close look at the critical challenges and issues we face in order to sharpen our approach to achieving our intended impact:

***SCC has determined that preserving and enhancing the remaining economic, racial, and ethnic diversity of our population is the overarching priority that drives our work today. This decision was made after witnessing the substantial displacement of low-income and working families from the western half of Somerville since the 1980s.***

With the City's projection of 30,000 new jobs and 6,000 new housing units coming to Somerville by 2030, as well as 6 new Green Line stops, and large scale redevelopment plans for Assembly Square, Union Square, and other districts on the horizon, Somerville is on the brink of major transformation. With this change comes great opportunity for the community: access to transportation, jobs, housing, and other amenities within walking distance. However, the risk of displacement of SCC's core constituency—low and moderate income and immigrant residents of Somerville, is higher than ever. Through this strategic planning process, SCC zeroed in on key questions we must address if we hope to be successful in realizing our intended impact:

1. *How can SCC sharpen its role in transitioning areas, i.e. those undergoing major redevelopment and/or with the arrival of new Green Line stations?*
2. *How should we consider using an Equity framework to move forward as we try to minimize displacement?*
3. *What are the ways we can increase our public profile in order to expand our impact?*
4. *How can we improve our internal operations to maximize our productivity and effectiveness?*

These questions helped to inform the goals and strategies included in this document.

### Highlights from the Plan:

1. SCC prioritizes transitioning areas (those areas prone to change as a result of new development and GLX stations) to concentrate its focus across many key areas of work, including: land use planning; organizing to influence zoning, community benefits agreements; and property acquisition of large and small properties. "Prone to change" areas are those that are most likely to see significant transformation through development and urban reuse plans, with associated risk of increased market pressures and displacement.
2. SCC recognizes the need to have a cohesive communications strategy to increase our recognition, presence, and impact across a broad and diverse audience.
3. In order to expand its impact, SCC needs to create an aggressive fundraising strategy, including increasing its donor base and establishing reserve and working capital funds for the development of affordable housing.
4. SCC is launching First Source program with city and organizational partners to connect local workers with local jobs. To do this effectively will require expanded capacity in Asset Building Department.

5. In concert with building leadership and expanding SCC's base, SCC will dedicate more resources to actively engaging tenants of SCC properties in organizing and Asset Building work.
6. SCC will adopt a model of using criteria to help inform key decisions, such as property acquisitions, prioritization for new work, and equity measures.
7. SCC is committed to maintaining a strong focus on affordable housing production and preservation; organizing and planning around social equity, including jobs, housing and land use; and Asset Building through financial literacy, first time homebuyer, job readiness, and case management.

In the next 3 years, SCC hopes to achieve the following results:

**AFFORDABLE HOUSING**  
 90 rental units, 36 owner units produced  
 50 units acquired for rehab and resale  
 100% of Expiring Use units preserved  
 10 units set aside for homeless  
 Inclusionary Zoning Increase to >16%  
 City creates ambitious affordability requirement for public properties disposition  
 Significant CPA funding secured to meet affordable housing needs

**JOBS and ASSET BUILDING**  
 \$1.40 per sqft for Jobs Linkage Fee  
 All new large developers and employers commit to negotiated local hiring goals  
 240 job placements through First Source  
 120 people improve financial stability  
 1000 (50% from Somerville) prepared for homeownership  
 20 people access higher education with IDA

**TRANSITIONING AREAS**  
 CBA signed in Union Square  
 75% of SCC Development in Transitioning areas  
 75+ partners/individuals endorse Equity Standards  
 At least 50% of SCC commercial tenants are local

**MEMBERSHIP & PARTICIPATION**  
 >1500 participate in Asset Building programs  
 LDI: 50 graduates, 150 participants of workshops, 25 become active leaders  
 105 new active members in campaigns; 45 new core leaders  
 45 tenants participate in SCC activities; >10 become active

**OPERATIONS**  
 \$900,000 accrued for working capital fund  
 \$686,000 earned donations  
 \$1,300,000 funded grants  
 Communications Strategy in place  
 Diversity Strategy in place  
 Criteria standards established

To effectively achieve these results will require maintaining our core programming identified as top priority, as well as to raise additional funds to increase our capacity and scale of our work.

### 3 Year Strategic Plan: 2014-2017

#### Overview

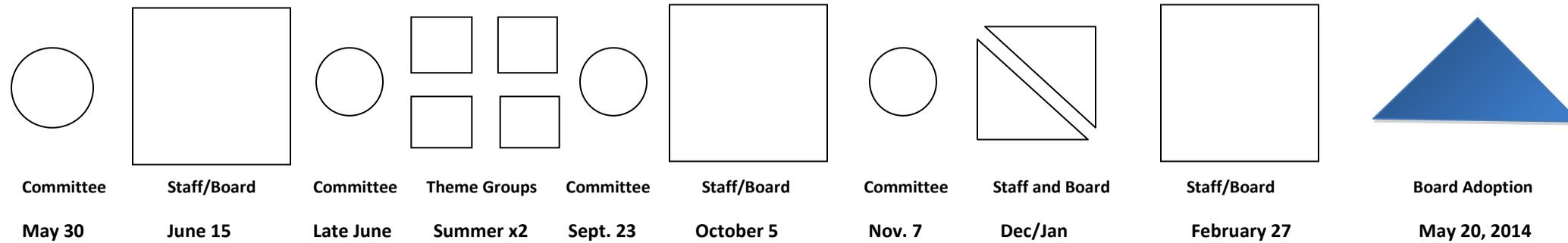
Founded in 1969, Somerville Community Corporation (SCC) is a membership organization with a mission to develop and preserve affordable housing, offer financial stability focused services, and build a collective voice through community organizing and planning in order to realize a stable, diverse, and affordable community. In its 45-year history, SCC has completed over 20 affordable housing projects, resulting in more than 100 ownership units and 184 rental units, and 35 scheduled for construction later this year. We have helped hundreds of adults and young people gain security through counseling, referral and mediation programs. We have mobilized hundreds of residents to win organizing campaigns around affordable housing, jobs, neighborhood equity, and access to city amenities.

In the Spring of 2013, Staff and Board launched the Strategic Planning process with the goal of refreshing its previous 3 Year Strategic Plan, to create the Strategic Plan for 2014-2017. SCC formed a Strategic Planning Committee made up of staff and board members (SPC). This group was responsible for shepherding the strategic planning process from start to finish, with Deputy Director, Meridith Levy managing the process. With SPC as the convener, all SCC board and staff members actively participated throughout the process between June, 2013 and May, 2014. Early in the process, the SPC (Strategic Planning Committee) agreed to consider this Strategic Plan a refresher of the previous 3 Year Strategic Plan, and thus maintained the Intended Impact statement as the overarching goal under which all sub goals and strategies should adhere:

**Intended Impact:** SCC has determined that preserving and enhancing the remaining economic, racial, and ethnic diversity of our population is the overarching priority that drives our work today. This decision was made after witnessing the substantial displacement of low-income and working families from the western half of Somerville since the 1980s.

The Strategic Planning Committee proposed to undertake a planning process that would focus on key strategies and questions that need to be addressed to more effectively advance SCC's work towards reaching SCC's intended impact. SCC decided to conduct an internal planning process with staff and board to achieve this goal for the 2014-2017 Strategic Plan. The process started with a close look at the context of our work by examining relevant data, questions and themes deemed essential to our future strategy. Resulting recommendations and actions provided the bolus of ideas to be included in the plan, which were further sorted into priority areas, and matched with outcome metrics. This process is described below.

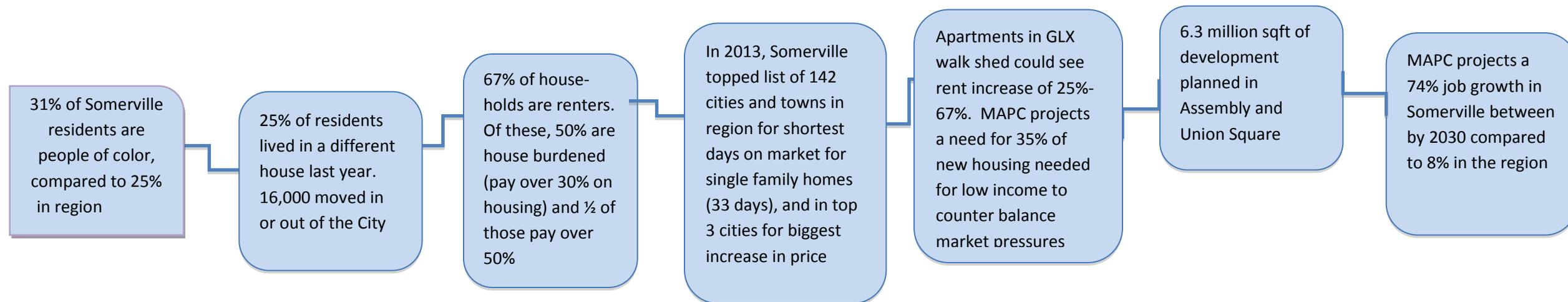
## Process and Time Line



- a. May 30<sup>th</sup>, 2013: Planning Committee meets to set goals and prepare for June 15<sup>th</sup> retreat
- b. June 15<sup>th</sup>, 2013: Staff/Board Retreat: Somerville Context, Data Exploration, Emerging Themes
- c. End of June: Planning Committee reviews retreat, prepares for next phase of work
- d. Summer: 4 strategic theme groups each meet 2x to discuss targeted questions according to theme, and identify key questions and themes.
- e. September 23<sup>rd</sup>, 2013: Planning Committee meets to prepare for Staff/Board Retreat #2
- f. October 5<sup>th</sup>, 2013: Staff /Board Retreat #2: Groups present outcomes. Whole group presented with methodology to connect Small Group results with specific work activities based on SCC priorities. Holes are identified.
- g. November 7<sup>th</sup>, 2013: Planning Committee meets to create structure for plan based on outcomes of working groups and retreat.
- h. December-January: Staff and Board meet separately, as well as one meeting with representatives from both, to further prioritize strategies and actions.
- i. February 27<sup>th</sup>, 2014: Staff/Board Retreat #3: Review and prioritization of plan to set strategies and actions
- j. May 20<sup>th</sup>, 2014: Board presented with vote to adopt the plan

## The Somerville We Live In: Our Context

Participants analyzed key data regarding relevant land use, housing, economic development and demographic trends at the first Staff/Board retreat.



Looking out the window of our 2<sup>nd</sup> floor perch in Union Square, we are watching the neighborhood begin to change its shape. We have watched some small businesses shut their doors, making way for new businesses, others reducing their size to share their space with other businesses in order to keep up with rising rents. We hear stories of buildings being sold before going on the market. One business witnessed an increase in assessed value from \$645,900 in 2012 to \$920,200 in 2014. We have also experienced rent increases that present SCC with the question of whether or not we will be able to maintain our presence in this heated market.

Speculation pressures for businesses, non-profits, and residents, are on the rise in Somerville, particularly in the areas that are *transitioning*, i.e. going through significant redevelopment and transformation, such as the areas along the new Green Line, and Assembly Square. With the new Orange Line stop at Assembly Square to open in the fall of 2014, 6 new Green Line stops arriving by 2019, and large scale development projects underway in Assembly Square and Union Square (over 6 million square feet in total in next few years), the City of Somerville will experience the kind of transformation most cities haven't experienced in decades. We are at the tip of a development frontier. In its SomerVision Plan, the City of Somerville projects a goal to add 30,000 new jobs and 6,000 new units of housing by 2030, with 1200 dedicated as affordable. Meanwhile, the Dimensions of Displacement study produced by MAPC with SCC and the City of Somerville, projects the need to dedicate 35% of its new housing stock to affordable for low income residents if we hope to minimize displacement of residents who can no longer keep up with the market increases likely to coincide with the development of the Green Line. This report projects possible rent increase along the Green Line of between 25% and 67% from what they are

currently. For example, an apartment that costs \$1400 each month today could cost \$2300 when the GLX arrives, and as described above, we are already hearing stories of speculation and rent increases with the anticipation of the Green Line and revitalization of “hot” market areas like Union Square.

Somerville continues to be a home for new immigrants from all over the world. Over 50 languages are spoken at home among the families with children in the public schools. The number of non-white individuals (31% compared to 25% regionally) in Somerville has continued to climb, though more slowly in recent years. Despite Somerville’s overall demographic diversity, the city is geographically divided, with a higher concentration of Black and Latino residents, as well as lower income residents in the eastern half of Somerville. Residents living closer to Davis Square and Porter Square have a significantly higher median income than the rest of the city, with a much lower non-white population. Age tells another interesting story: the bulk of people moving into Somerville are between 20 and 30 years old, with more people between 30 and 40 (as well as young children) moving out than other age groups. Lack of affordable housing has been the top reason given by families for leaving the Somerville school system.

### **SCC’s Collective Perspective of Somerville Today and SCC’s Role:** Observations by SCC Staff and Board Members

- More wealthy people
- More racial diversity
- If new jobs go to Somerville residents, helps stabilize the community. If not, then puts inflationary pressure on housing market.
- Disconnect between our lives and future development. If we’re not successful in shaping that development, it could come back to reshape our City and our lives in ways we don’t like.
- City poised to create 30K jobs over next 2 decades
- Economy strengthening in city
- Housing increasingly less affordable, especially in parts of city formerly affordable or around transit sites.
- Green Line is breaking ground: walking distance to GLX, rent expected to increase
- Somerville City Plan says housing will increase by 12K, will this be affordable?
- Assembly Square: who are jobs for, and will this be profitable for city?
- Grandiose/short-term strategy: “hip” and “fun”, but is there enough long term investment to stabilize population and families?
- There is a lot happening. It is a transformative time in Somerville
- Golden age of ethnic diversity? Much more diverse than 20-30 years ago. Can we keep it that way?
- A lot is happening very quickly. Whose voice is being heard?
- In the last 3 years, Somerville has heavily engaged and invested in visioning for its future, with significant community input, now time to implement.
- Who will be able to benefit from these new changes
- Who will obtain the jobs, what kinds of jobs, and where will they live?
- Young adults are by far the most mobile, moving in and out of the city at very high rates
- It is likely that the other most mobile population, the 1-4 year olds, are going with them.
- Building permits have skyrocketed in recent months, and foreclosures and condo conversions are down.

- A slew of major plans have been unveiled to drive the changes taking place, aka SomerVision and Union Square Revitalization Plan, and key policies are on the table to determine the relationship between jobs and housing, in the face of major transportation and economic improvements.

### Implications for SCC

- How do we get message (like short term vs. long term) out to people, in order to shift the power? Tell our story.
- Driving a need for figuring out how to message to think about long-term
- SCC-stressed out, trying to cover too much. We need to SLOW DOWN and focus our energy on fewer things, and be more strategic.
- Interconnected: Broad approach—find more strategic way to connect our things, AND match capacity to problem
- City is increasingly doing a better job of community process and vision. But development happens project by project, and not always connected with that vision.
- Bridging silos, engage with as many people as possible, feel empowered to hold City accountable to delivering on community vision.
- Building capacity doesn't have to be just us. Expand our partnerships, and consider doing more campaigns in coalition to expand our capacity and base.
- A lot of changes in Somerville. Generally talked about broadly. Value in having subtle discussion about these issues in a complex way. Not just *what* happens, but *how*.
- How should we spend our time and prioritize between chasing or following other meetings, City, etc., or cultivating new members, etc.
- Be more thoughtful/intentional about building relationships, and then having them build more relationships . . .(and so on, and so on) by going to people, door knocking, etc. Tell our story more.
- Building membership isn't "for" SCC, but about achieving these goals shared by people through a broader base.
- The "churn" in Somerville—how do we anchor people so they feel really engaged in their community?

### Important Themes and Questions

Board and Staff split into 4 groups categorized by strategic themes the SPC deemed essential to addressing in this Strategic Plan. These 4 groups each met 3-4 times throughout the summer to discuss their topics, and to zero in on the key questions and actions to be addressed in the strategic plan. These theme groups and resulting questions are summarized below (note recommended actions can be found in Appendix 2:

- a. Group 1: **Increasing our public profile**
- b. Group 2: **What should SCC's role be in Somerville's transitioning areas with projected new development?**
- c. Group 3: **Equity: How does that tie into our work, and in particular, our intended impact to minimize displacement?**
- d. Group 4: **What's Going on Inside SCC: How do we improve our internal systems to maximize our productivity and effectiveness?**

## Creating the Plan

At the 2<sup>nd</sup> Staff/Board Retreat on October 5<sup>th</sup>, participants discussed the key questions and priority issues to be incorporated into the final plan, as well as to establish the organizing mechanism to contain this work. This input led to the creation of the first draft plan, with a proposed set of 5 overarching goals, each occupied by strategies and actions. Over the next 2 months, members of staff and board scrutinized this draft to create a comprehensive document that reflected the work and strategies Staff and Board felt would adequately address our key questions to position us to strategically and effectively move us closer to our intended impact. We established the following definitions to guide us in the sorting of our goals and work:

**Goals:** These are the statements that describe the overarching components of our vision, which if achieved, would move us to our intended impact.

**Strategies:** These describe a specific approach to our work that will lead us toward desired goal. These are established in the strategic plan to guide our work in the foreseeable future.

**Actions:** These are the mechanisms we use to execute the stated strategy. While we include these in the strategic plan to help organize and guide our work, the way they are used may be shifted throughout the period of the strategic plan. These are the tools we include in our tool kit to help us move our strategy forward.

**Activities:** These will be left to the staff work plans, and don't need to be included in the strategic plan. These are the day to day components of what we do, and are constantly readjusted based on our weekly/monthly circumstances.

## Priorities

SCC sorted the plan by creating priority areas divided by top, mid, low, priority, as well as recommended to eliminate. We further identified which actions would require additional funding, and assessed the required time line to take on the action. We created a list of criteria to help us evaluate priority areas of work. We also charted actions on a quadrant to assess priority by looking at timeframe versus importance. After Staff and Board finalized its recommendations for what and how to include and prioritize in the plan, Staff attached measurable outcomes to each action.

### Criteria

- A. Making sure more people have access to affordable housing
- B. Making sure people have access to good jobs
- C. Helping people achieve financial stability
- D. Building a strong and growing base of leaders who have a collective voice in influencing key decisions and policies in Somerville that directly impact their lives.
- E. Taking an active role in shaping land use and development in Somerville to benefit low and moderate income residents
- F. Leads to measurable impact on areas of the city most prone to change
- G. Moves us toward outcomes that meet Equity Standards
- H. Builds more relationships and partnerships from a broad base of stakeholders,
- I. Reinforces synergies between program and project areas
- J. Can be sustained with available or attainable resources and capacity, including partnership efforts
- K. Plays a leveraging role to move us closer to accomplishing bigger goals in the future

## Summary of Results

### Projected Outcomes for 3 Year Plan

#### AFFORDABLE HOUSING

90 rental units, 36 owner units produced  
50 units acquired for rehab and resale  
100% of Expiring Use units preserved  
10 units set aside for homeless  
Inclusionary Zoning Increase to >16%  
City creates ambitious affordability requirement for public properties disposition  
Significant CPA funding secured to meet affordable housing needs

#### JOBS and ASSET BUILDING

\$1.40 per sqft for Jobs Linkage Fee  
All new large developers and employers commit to negotiated local hiring goals  
240 job placements through First Source  
120 people improve financial stability  
1000 (50% from Somerville) prepared for homeownership  
20 people access higher education with IDA

#### TRANSITIONING AREAS

CBA signed in Union Square  
75% of SCC Development in Transitioning areas  
75+ partners/individuals endorse Equity Standards  
At least 50% of SCC commercial tenants are local

#### MEMBERSHIP & PARTICIPATION

>1500 participate in Asset Building programs  
LDI: 50 graduates, 150 participants of workshops, 25 become active leaders  
105 new active members in campaigns; 45 new core leaders  
45 tenants participate in SCC activities; >10 become

#### OPERATIONS

\$900,000 accrued for working capital fund  
\$686,000 earned donations  
\$1,300,000 funded grants  
Communications Strategy in place  
Diversity Strategy in place  
Criteria standards established

### Highlights and New Directions

1. SCC prioritizes transitioning areas to concentrate its focus across many key areas of work, including: land use planning; organizing to influence zoning, community benefits agreements; and property acquisition of large and small properties. Transitional areas are those that are most likely to see significant transformation through development, new Green Line stations, and urban reuse plans, with associated risk of increased market pressures and displacement.
2. SCC recognizes the need to have a cohesive communications strategy to increase our recognition, presence, and impact across a broad and diverse audience.
3. In order to expand its impact, SCC needs to create an aggressive fundraising strategy, including increasing its donor base and establishing reserve and working capital funds for the development of affordable housing.
4. SCC is launching First Source program with city and organizational partners to connect local workers with local jobs. To do this effectively will require expanded capacity in Asset Building Department.

5. In concert with building leadership and expanding SCC's base, SCC will dedicate more resources to actively engaging tenants of SCC properties in organizing and Asset Building work.
6. SCC will adopt a model of using criteria to help inform key decisions, such as property acquisitions, prioritization for new work, and equity measures.
7. SCC is committed to maintaining a strong focus on affordable housing production and preservation; organizing and planning around social equity, including jobs, housing and land use; and Asset Building through financial literacy, first time homebuyer, job readiness, and case management.

### **Funding and Capacity Implications:**

There are 35 Actions that are considered top priority. Of these, 29 are covered by existing budget. 6 of the top priorities have partial funding but require more to meet stated outcomes. Because these are considered top priority, SCC will need to consider expanding the budget to fully execute these actions. The 6 actions requiring additional capacity include the following:

1. Acquire and build mixed-use, affordable properties for low-to-moderate-income residents.
2. Explore small property acquisition and moderate rehabilitation homeownership program with City of Somerville, by SCC and/or interested private parties.
3. Implement and run, along with partners, a First Source program to connect workers with training and good job opportunities.
4. Develop, formalize and implement a donor development program to both reach more potential donors, and to target large donors for potential tax-credit match.
5. Create communications strategy with core messaging and branding to be applied across all modes of communication, targeting broad audience.
6. Create an organizational diversity and cultural competency analysis and action for all levels of the organization.

### **Acknowledgments**

The Strategic Planning Committee members contributed long hours, creative energy, and constructive analysis to creating and executing the strategic planning process. As a group and as individuals, everyone played essential roles: 1) designing interactive retreats; 2) establishing a working template for goals and strategies; 3) thinking through criteria and methodologies for prioritizing goals; 4) analyzing the key questions and results from staff and board working groups and retreats; 5) moving from identifying the critical issues and questions to creating the plan.

Thank you team!

**Fred Berman, Maria Flores, Van Hardy, Danny LeBlanc, Meridith Levy, Libby Mahaffy, Mashael Majid, René Mardones Stephanie Toews-Moeling, Yara Vergucht.**

All data, notes from meetings and working groups, and other relevant information used to build this Strategic Plan are on file: H:\SCCAdmin\Strategic Plan\Strategic Plan2013\.

## The Plan

Goal 1: Increase the amount and stabilize the stock of affordable rental and homeownership housing in Somerville.						
Strategy 1: Establish an aggressive strategy and pipeline for SCC's affordable housing production.	Action	Measurable Outcomes	Time Line	Departments	Priority	Funding
	A. Develop partnerships to increase acquisition, financing, and production of affordable housing in Somerville	<ul style="list-style-type: none"> <li>• 2-4 partnerships</li> </ul>	Ongoing	Real Estate	Top	Existing
	B. Acquire and build mixed use, affordable properties for low to moderate income residents	<ul style="list-style-type: none"> <li>• Increase annual production by 100% starting in 2015</li> <li>• Avg. of 30 units of multi-family rental housing each year for households earning at or below 60% of AMI</li> <li>• Avg. of 12 homeownership units annually, 1/3 each for households earning at or below 80%, between 80-110% and market</li> </ul>	Ongoing	Real Estate	Top	Additional resources needed
	C. Explore small property acquisition and moderate rehabilitation homeownership program	<ul style="list-style-type: none"> <li>• 15-20 units purchased, moderately rehabilitated, recorded affordable housing restriction, and resold</li> </ul>	Ongoing	Real Estate	Top	Additional resources needed
	D. Establish SCC reserve fund and access to working capital	<ul style="list-style-type: none"> <li>• \$300,000 accrued annually from development fees</li> </ul>	Ongoing	Real Estate	Top	Existing
	E. Acquire expiring use properties as needs and as opportunities arise	<ul style="list-style-type: none"> <li>• Average of 6 units annually</li> </ul>	As arises, Yr 2 and 3	Real Estate		New resources required
	F. Provide set-aside units for homeless and extremely low income households as resources are available	<ul style="list-style-type: none"> <li>• 2-4 annually as subsidies are available</li> </ul>	As arises	Real Estate		

	Action	Outcome	Time Line	Departments	Priority	Funding
<b>Strategy 2: Prevent the loss of housing and strengthen existing housing that is affordable to low- and moderate-income Somerville individuals and families.</b>	A. Strengthen affordable housing provisions in the Zoning Code	<ul style="list-style-type: none"> <li>• Inclusionary Zoning increased to 1:6 city wide and 1:5 in TOD areas;</li> <li>• AHOC priorities adopted in new Zoning</li> </ul>	Yr 1 and 2	Organizing	Top	Existing
	B. Organize tenants to renew expiring use properties	<ul style="list-style-type: none"> <li>• Preservation of all units due to expire in this time frame.</li> <li>• Affordability is built into permitting criteria</li> </ul>	As arises, Yr 2 and 3	Organizing, working with Real Estate	Top	Existing
	C. Continue to do referrals to residents in need of housing assistance	<ul style="list-style-type: none"> <li>• 30 referrals per year</li> <li>• 18 households are able to keep housing as result of our efforts</li> </ul>	Ongoing	Asset Building	Top	Existing
	D. Organize and create policies that promote affordability for public disposition properties	<ul style="list-style-type: none"> <li>• Up to 50% affordability required on city disposition properties slated for housing;</li> <li>• ordinance passed to require proposed % of affordability</li> </ul>	Yrs 1, 2,3	Organizing		Existing
	E. Implement a pilot model and protocols for resident services	<ul style="list-style-type: none"> <li>• 150 households participate over 3 years</li> </ul>	Immediate	Asset Building, Real Estate		Existing
	F. Explore property improvement program for small property owners	<ul style="list-style-type: none"> <li>• Interested board members make proposal</li> </ul>	As arises	Real Estate, Board		New resources required

	Action	Outcome	Time Line	Departments	Priority	Funding
<b>Strategy 3</b> Increase resources for affordable housing development and preservation.	A. Work with leaders and partners in the community to sustain CPA as a significant funding source for affordable housing	<ul style="list-style-type: none"> <li>• 50%-75% CPA funds per year dedicated to affordable housing</li> </ul>	As arises	Real Estate, Board, Organizing	Top	Existing
<b>Strategy 4</b> Promote increased housing subsidies and resources for Extremely and Very Low-Income Somerville residents.	A. Continue utilizing mechanisms to ensure deeper affordability within SCC properties	<ul style="list-style-type: none"> <li>• Secured maximum number of Community Based Housing Vouchers, Project Based Vouchers, and Massachusetts Rental Vouchers</li> </ul>	Ongoing	Real Estate	Top	Existing
	B. Explore joining campaigns to increase federal and state funding resources needed by extremely low-income and very low-income residents	<ul style="list-style-type: none"> <li>• Decision reached whether or not to join campaigns</li> <li>• If yes, 50 members participate</li> <li>• state and federal increases passed</li> </ul>	As arises	Organizing		Existing
	C. Explore using city median income instead of area median income to determine eligibility for AH for city policies and programs	<ul style="list-style-type: none"> <li>• Proposed policy created on where and how to add this into city policies and programs.</li> <li>• If initiate campaign, local MI used as assessment for key Somerville housing programs and funding</li> </ul>	Yr 2, 3	Organizing		Existing

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

	<b>Action</b>	<b>Measurable Outcomes</b>	<b>Time Line</b>	<b>Departments</b>	<b>Priority</b>	<b>Funding</b>
<b>Strategy 1: Make sure a significant percentage of new jobs in Somerville go to low-income and immigrant Somerville residents, with emphasis on good, living wage jobs with career growth opportunities.</b>	A. Organize to establish sustainable funding streams for first source and workforce development	<ul style="list-style-type: none"> <li>• Passage of Jobs Linkage Fee at \$1.40/sf above 30,000 sf</li> <li>• Creation of Fee for Service model between City, SCC and employers</li> <li>• Additional funds raised through other sources</li> </ul>	Yrs 1, 2,3	Organizing	Top	Existing
	B. Organize to establish CBAs between community, City, and major employers	<ul style="list-style-type: none"> <li>• MOU with MBTA/MassDOT resulting in Access and Opportunities Committee</li> <li>• Committee established for First Source in Somerville</li> <li>• CBA with master developer in Union Square</li> </ul>	Yrs 1, 2, 3	Organizing, Planning	Top	Existing
	C. Implement and run First Source program with partners to connect workers with training and good job opportunities	<ul style="list-style-type: none"> <li>• 150 participants reached per year;</li> <li>• Case management with 75 participants per year;</li> <li>• 60 placements of target audience per year</li> <li>• Partnerships with over 10 employers over next 3 years</li> <li>• Commitment from all new large developers and employers to negotiated local hiring goal</li> </ul>	Yrs 1, 2, 3	Asset Building, Organizing	Top	Additional resources needed

	Action	Outcome	Time Line	Departments	Priority	Funding
	D. Set local hiring goals for SCC construction	<ul style="list-style-type: none"> <li>• 15-20% Yr 1,2; 30 % after</li> </ul>	Yr 1, ongoing	Organizing, Real Estate	Top	Existing
	E. Join efforts with regional and local organizations to support broader campaigns that would positively impact Somerville workers	<ul style="list-style-type: none"> <li>• 50 members engaged in Raise Up MA, to help win increase in Minimum Wage</li> <li>• Participation in 1 other campaign, engaging 50 members</li> </ul>	Yr 1, 2 and as arises	Organizing		Existing
	F. Organize to promote good jobs and local hiring policies for publicly funded projects	<ul style="list-style-type: none"> <li>• Agreements for publicly funded projects include language encouraging local hiring and good jobs;</li> <li>• &gt;30% of jobs go to Somerville residents</li> </ul>	As arises	Organizing		Existing
	G. Engage small businesses in our work, particularly those run by or providing decent jobs for our target constituents	<ul style="list-style-type: none"> <li>• 5-10 business owners become active members per year</li> </ul>	As arises	Organizing, Asset Building		Existing
<b>Strategy 2: Support Somerville residents who are at financial risk of displacement in increasing their financial stability.</b>	A. Increase access to financial literacy in Somerville	<ul style="list-style-type: none"> <li>• 60 participate in Fin Ed Class per year</li> <li>• 2/3 of participants successfully reduce debt, increase income, and/or improve credit scores</li> </ul>	Ongoing	Asset Building	Top	Existing
	B. Prepare residents for the possibility of homeownership through comprehensive training	<ul style="list-style-type: none"> <li>• 350 participants per year;</li> <li>• over 50% from Somerville</li> </ul>	Ongoing	Asset Building	Top	Existing
	C. Provide support to homeowners facing potential foreclosure	<ul style="list-style-type: none"> <li>• 10 households served per year</li> <li>• 5 foreclosures prevented per year</li> </ul>	As arises	Asset Building		Existing

	D. Enhance Somerville residents' ability to receive college-level training through IDA program and support	<ul style="list-style-type: none"> <li>• 2014 IDA Cohort finishes successfully in September 2014</li> <li>• new cohort of 10 participants engaged and saving by mid-2015</li> </ul>	Ongoing	Asset Building		Existing
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**Goal 3: Execute vision to expand SCC's impact on transitioning areas of the city, to result in more equitable outcomes.**

	<b>Action</b>	<b>Measurable Outcomes</b>	<b>Time Line</b>	<b>Departments</b>	<b>Priority</b>	<b>Funding</b>
<b>Strategy 1: Facilitate the active engagement and influence of community members through organizing and land use planning around specific sites in target areas.</b>	A. Position SCC to have an active role in advance of important decisions	<ul style="list-style-type: none"> <li>• Master development plan for Union Square incorporates Equity Goals</li> <li>• funding and programs to implement equity goals in Union Sq. and other areas</li> </ul>	Yr 1 and ongoing	Community Planning, Organizing	Top	Existing
	B. Broaden and formalize partners to achieve desired impact in areas most prone to change	<ul style="list-style-type: none"> <li>• 25 partners commit to a goal included in Equity Standards</li> <li>• 50+ endorse</li> </ul>	Yr 1 and ongoing	Community Planning		
<b>Strategy 2: Expand SCC's portfolio of tools and strategies to develop and leverage affordable housing and jobs in transitional areas.</b>	A. Partner with private developers and other organizations to build projects with community-prioritized components and amenities	• 75% of SCC development in transitional areas: Union Square, Gilman Square, Assembly Square, Washington St/Inner Belt	Yr 1, as arises	Real Estate	Top	Existing
	B. Organize to get higher inclusionary zoning requirements in these districts	• At least 17.5% in TOD, high density areas	Yr 1, 2	Organizing	Top	Existing
	C. Establish CBA's in prone to change districts that package housing, jobs, and other community interests	• CBA for master development in Union Square	Yr 1, 2	Organizing, Planning	Top	Existing
<b>Strategy 3: Pursue opportunities to support or create commercial and economic development in areas prone to change.</b>	A. Continue to develop mixed-use properties, particularly in TOD areas	• 3 properties of 20 residential units or more	Ongoing	Real Estate	Top	Existing
	B. Prioritize local small business preference for commercial components of SCC projects.	• 50% of commercial tenants are locally controlled and owned	Ongoing	Real estate	Top	Existing

**Goal 4: Expand our membership base and invest in the development of leaders in SCC and in the community.**

	Action	Measurable Outcomes	Time Line	Departments	Priority	Funding
<b>Strategy 1: Create effective avenues for active participation among people who are at highest risk of displacement.</b>	A. Develop a leadership pipeline for members to move into leadership positions within SCC and the community	Per year: <ul style="list-style-type: none"> <li>• 35 new leaders</li> <li>• 15 core leaders</li> <li>• 2 leaders become members of board</li> <li>• 2-5 go onto other leadership positions in community</li> <li>• 250+ members participate in organizing/planning activities</li> </ul>	Ongoing	Organizing	Top	Existing
	B. Help people gain skills, and access to popular education and technology they need to be effective leaders	<ul style="list-style-type: none"> <li>• 20 LDI participants per year,</li> <li>• 50% LDI grads become active;</li> <li>• 4-5 workshops per year for 60-100 participants</li> </ul>	Ongoing	Organizing, Planning	Top	Existing
	C. Refine and rebuild membership system	<ul style="list-style-type: none"> <li>• New membership committee established</li> </ul>	Yr 2		Top	Existing
	D. Establish clear pathways for volunteers to lend their skills	<ul style="list-style-type: none"> <li>• Volunteer program established</li> </ul>	Yr 2 or 3			New
<b>Strategy 2: Broaden the meaningful participation and decision making of members, clients, and tenants of SCC in other areas of the organization.</b>	A. Streamline pathways between asset building programs and community organizing and planning	<ul style="list-style-type: none"> <li>• 5-10 people per year are active participants of Asset Building program and active leader in organizing/planning work</li> </ul>	Ongoing	Organizing, Planning, Asset Building	Top	Existing
	B. Organize SCC tenants to become active leaders	Per year: <ul style="list-style-type: none"> <li>• 15 SCC tenants participate in organizing activities</li> <li>• 3-5 become active members/leaders</li> </ul>	Ongoing	Organizing		

**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.**

	<b>Action</b>	<b>Measurable Outcome</b>	<b>Time Line</b>	<b>Departments</b>	<b>Priority</b>	<b>Funding</b>
<b>Strategy 1: Design and carry out a financial plan for both revenues and expenses that allows SCC to carry out its goals and objectives, and become a sustainable organization.</b>	A. Develop, formalize and implement a donor development program	<ul style="list-style-type: none"> <li>• Funding Strategy Created</li> <li>• \$186K raised year 1,</li> <li>• \$250K raised year 2 and beyond</li> </ul>	Year 1, 2, 3	Admin	Top	Additional resources needed
	B. Create real estate development reserve and working capital fund	<ul style="list-style-type: none"> <li>• \$300,000 set aside annually for real estate development reserve and working capital until the reserves and working capital total \$1.5 million (5 years)</li> </ul>	Yr 1,2, 3	Real Estate	Top	Existing
	C. Broaden base of foundation grants and contracts to support our prioritized work	<ul style="list-style-type: none"> <li>• \$400,000 raised in year 1</li> <li>• increase by 10% yr 2 and beyond</li> </ul>	Year 1,2, 3	Admin	Top	Existing
<b>Strategy 2: Expand SCC's public profile and visibility.</b>	A. Create communications strategy with core messaging and branding to be applied across all modes of communication, targeting broad audience	SCC's new image and brand incorporated into website, materials, etc.	Year 1, contingent on funding	Communications	Top	Additional resources needed
	B. Effectively communicate with target membership in a way that strongly acknowledges cultural and linguistic differences	<ul style="list-style-type: none"> <li>• multi-lingual website in place</li> <li>• interpretation available for all public meetings hosted by SCC</li> <li>• SCC's board, committees and classes minimize language barriers</li> </ul>	Ongoing	All Staff	Top	Existing

	Action	Outcome	Time Line	Departments	Priority	Funding
<b>Strategy 3: Establish and implement protocols and practices to strengthen SCC's role as a diverse, democratic, member-led, and culturally astute organization.</b>	A. Create an organizational diversity and cultural competency analysis and action for all levels of the organization	<ul style="list-style-type: none"> <li>• Diversity plan created</li> <li>• notable progress towards goals in plan in Yr 3</li> </ul>	Year 2	All	Top	New resources required
	B. Review and formalize channels of interaction, reporting, and decision making between staff, board, committees, and members	SCC Committees document updated from 2006	Yr 1	All	Top	Existing
<b>Strategy 4: Update and review organizational operations, policies and procedures.</b>	A. Effectively manage and maintain SCC's portfolio of real estate assets	<ul style="list-style-type: none"> <li>• All required debt covenants maintained</li> <li>• vacancy rate of no more than 5%</li> <li>• energy efficiency achieved through upgrades of systems</li> <li>• incentive payments achieved through cash flow management</li> <li>• residents take active role in care and maintenance of units</li> </ul>	Ongoing	Real estate, Admin	Top	Existing
	B. Develop a system of criteria to be used to guide organizational decisions: equity standards; criteria for taking on new work; real estate acquisition criteria; criteria for when to join larger campaigns	Criteria systems developed	Yr 1	All	Top	Existing

	C. Capitalize on strategies, methodologies, synergies and shared work to strengthen SCC's impact	<ul style="list-style-type: none"> <li>• 1 success per year documented</li> <li>• Multiple cross department projects and programs per year</li> <li>• staff, board and committee members share common strategy</li> </ul>	Ongoing	All	Top	Existing
	D. Make sure we have all required internal policies and procedures updated	All policies updated	Yr 1	Admin		Existing