



EVERYBODY MATTERS

# STRATEGIC PLAN FY 2021-2023



South Middlesex Opportunity Council

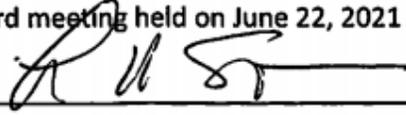
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## Formal Board Acceptance

The Board of Directors of South Middlesex Opportunity Council reviewed and adopted the FY 2021-2023 Strategic Plan at the Board meeting held on June 22, 2021 in Framingham, MA.

Larry Scult – Board President

A handwritten signature in black ink, appearing to read 'L Scult', is written over a horizontal line.

Date: June 22, 2021

## Introduction

This document lays out the strategic direction for South Middlesex Opportunity Council (SMOC) for FY2021 to 2023. Since FY2021 will be ending on September 30, 2021, we have combined its goals with FY2022, which begins on October 1, 2021. The key Individual/Family Level and Agency Level Goals were derived from the comprehensive Community Assessment Report we produced at the end of 2020 following a series of surveys, focus groups and key stakeholder interviews. Each need is followed by a Strategic Goal, Specific Objectives for the three fiscal years, Service Delivery mechanism, Service Gaps, and Linkages which describe current and future collaborations and partnerships.

The entire process was overseen by a 17-member Planning Committee comprised of the Executive Team, Senior Management, Planning & Compliance staff, and one Board member. For the community assessment, we conducted a series of surveys, focus groups and interviews with clients, community members, community organizations, key stakeholders, Board members, staff and volunteers from October 2019 to March 2020. In all, 562 (46.4% response rate) surveys were completed for the Community Needs & Customer Satisfaction Survey. We held four focus groups with participants in one of our affordable housing programs in Framingham, a supportive housing program for young adults in Framingham, an emergency shelter for single, unaccompanied men in Marlborough, and our ESL program in Framingham. Twenty-one community organizations responded to the Community Organizations Survey while five key stakeholder interviews were held with the chief executives of Lovin' Spoonfuls Food Rescue, Advocates Inc., MassHire MetroWest, MetroWest Health Foundation and Framingham Adult ESL Plus (FAESL+). About a third (258) of the staff completed the Staff Survey. The response rate for the Board survey was impressive at 82%. We conducted a Volunteer Survey for the first time but the response rate was extremely low at only 9 responses.

The community assessment revealed that housing, financial assistance for renters and homeowners, behavioral healthcare, workforce development and food security continue to be key needs for the majority of people we serve. Other needs identified include affordable and accessible transportation and childcare, utilities payment assistance, ESL, personal protective equipment, cleaning supplies and technology and internet access. The COVID-19 pandemic has only exacerbated these issues and revealed the deep inequities within our communities.

The internal assessment highlighted the need for increased and enhanced professional development opportunities for staff, better support and communication from managers and new/enhanced services for persons with disabilities, LGBTQ populations, transportation and housing. Overall, the volunteers who responded to the Volunteer Survey reported a positive experience but expressed the need for clearer expectations, more staffing on site and more recovery-focused meetings and GED teachers. Board members expressed general satisfaction with the agency's performance, as well as their own. Areas that could be strengthened include

their inclusion in fund raising, training, awareness of the implementation of strategic goals and communication and connection among members.

Founded in 1965 in Framingham, MA, SMOC is a nonprofit corporation with a 501 (C) (3) federal tax designation, a federally designated Community Action Agency for the MetroWest Region, and a certified Ch.40H statewide Community Development Corporation. Our CSBG service area covers Ashland, Bellingham, Framingham, Holliston, Hopkinton, Marlborough, Natick, Northbridge, Southborough and Wayland. We also offer programs and services in Lowell, Springfield, Waltham and Worcester.

As we are all aware, 2020 was a pivotal year in the country and around the world. The COVID-19 pandemic and racial injustice collided to wreak unimaginable havoc and destruction across the United States and the world. Here at SMOC, we suffered our fair share of loss and disruption. The agency was able to pivot relatively quickly to remote work to ensure that services and programs continued to be offered under constantly changing circumstances. Staff from across the agency stepped up and did an exemplary job to ensure the continued operation of our services and programs with minimal disruption. Our IT team made sure that both hardware and software were available to staff as many began working from home. Technology resources, including computers, expanded Wi-Fi and cell phones, were provided to family emergency shelter and housing residents. This was particularly important for the children in these programs so they could participate in online learning.

Our Board of Directors has provided much needed moral support, leadership, encouragement and direction throughout the pandemic. More specifically, some members have participated in the CARSP Planning Committee and provided critical education, information and guidance on the virus and the vaccines.

Our 24-hour shelter and housing programs continued to operate and serve the most vulnerable individuals and families in the communities we serve. Our Child Care and Head Start programs had to close initially but have gradually reopened to provide much-needed in-person care and learning. WIC, Rental Assistance, Fuel Assistance (LIHEAP), Housing Consumer Education Center, Voices Against Violence, SMOC Behavioral Health Services (SBH), Workforce Development, Energy Conservation Services and other programs developed procedures and processes to facilitate the process of providing services remotely. No show rates decreased in our WIC and SBH programs with the introduction of virtual service delivery and telehealth respectively. Barriers such as transportation and child care were eliminated due to the pandemic restrictions so it became easier for people to access services.

We created a food delivery program with funding from generous donors that helped countless individuals and families get the food they needed. As people's jobs disappeared or hours were cut, having the money to pay for basic needs became critical.

When the COVID-19 vaccine rollout began, we started collaborating with local health care providers across the state to bring vaccination clinics to residents and staff of our emergency

shelter and housing portfolios. Specifically, in Framingham (one of 20 communities designated by the state as an “Equity City” for vaccine distribution) we have partnered with the City in the Vaccine Equity Initiative to host a vaccine clinic at our main office. The Vaccine Equity Initiative is a statewide initiative designed to work “with the populations and communities hardest hit by COVID-19 to increase awareness and acceptance of the vaccine, access to vaccination locations, and vaccine administration rates. This approach is driven by community needs and is centered on equity, a core pillar of the state’s vaccine distribution plan, and is informed by the state’s COVID-19 Health Equity Advisory Group and the Vaccine Advisory Group.” (Mass.gov website). We have also collaborated extensively with Justice Resource Institute to vaccinate residents and staff in our emergency and permanent housing programs.

In Springfield, where we have a number of programs including an emergency food pantry and supportive housing, we are partnering with Karen Health on their mobile vaccination access program for the people we serve. In Worcester and Lowell, where we also have emergency and permanent housing programs, many residents and staff have been vaccinated through the City’s Health Department and community health centers.

As the pandemic begins to abate and more people become vaccinated, we are beginning to think about how to reopen our offices to staff and the general public. In the coming months, we will develop and implement a thoughtful and comprehensive reopening plan that will ensure the safety of everyone involved with the agency. As we usher in new leadership, we are optimistic that we will be successful in carrying out our core mission to ensure that the people we serve are accorded equitable opportunities to improve their lives.

The SMOC mission is “to improve the quality of life of low-income and disadvantaged individuals and families by advocating for their needs and rights; providing services; educating the community; building a community of support; participating in coalitions with other advocates and searching for new resources and partnerships.”

In the spring of 2020 as protests erupted around the county in the wake of the murders of George Floyd and many other African Americans at the hands of white police officers, we issued a statement in support of Black Lives Matter and formalized our Diversity, Access and Inclusion (DAI) Steering Committee. The DAI Steering Committee had been in the early stages of formulation as we began to recognize the importance of creating an agency that values every staff member, as well as the people we serve. Members are drawn from the SMOC Board, Executive Team, Senior Managers and Direct Care Staff. The mission of our Diversity, Access and Inclusion Initiative is “to embrace and celebrate diversity, accessibility, and inclusion as a core philosophy of SMOC’s “Everybody Matters” vision through education, conversation, events, activities, professional development, and training.”

Both missions will continue to guide the agency as we implement programs and provide services that will contribute toward a more just and equitable society where every resident can achieve their full potential and contribute to meaningful development.

## Individual/Family Level Goals

### Need: Affordable Housing

Strategic Goal: Develop, expand and advocate for a variety of housing programs to provide permanent, supportive, safe and affordable housing for low-income people in the communities we serve.

#### Specific Objectives:

- FY2021 and FY2022
  - Increase the number of permanent and transitional housing placements in the individual and family shelter systems.
  - Work with DHCD to increase the number of federal and state subsidized housing mobile and project-based vouchers for eligible people within our catchment area.
  - Connect clients in MetroWest emergency shelters to Rapid Transition of Individuals and Flexible Services programs for case management, move in costs, utility arrears, furniture purchases, other forms of financial assistance and eviction prevention efforts.
  - Implement the schedule of real estate improvements across SMOC Non-Profit Housing Corporation's portfolio in all regions.
  - Increase the proportion of Black, Indigenous, People of Color (BIPOC) in the First Time Homebuyers Program as a means to increase their levels of home ownership and build generational wealth.
  - Refer eligible LTLC Emergency Shelter clients to the Rental Assistance and Homeless Youth Programs operated by Community Teamworks (CTI).
  - Expand our project-based sector by acquiring more project-based properties and creating a project-based support team.
  
- FY2023
  - Develop additional, affordable housing options across our service regions in partnership with area providers.
  - Continue to advocate for safe and affordable housing opportunities across the Commonwealth of Massachusetts.
  - Establish our Supporting Neighborhood Opportunity (SNO) Mass program to promote the mobility of the federal voucher.
  - Increase the number of current participants that purchase homes through our Family Self Sufficiency Homeownership track.

#### Service Delivery:

- South Middlesex Non-Profit Housing Corporation
- Rapid Transition of Individuals program
- Flexible Services program
- First Time Homebuyers Program

- Supporting Neighborhood Opportunity (SNO) Mass program
- Family Self Sufficiency program
- CTI's Rental Assistance and Homeless Youth program

#### Service Gaps:

- The subsidized, affordable housing stock is insufficient to meet the need as some communities oppose the construction of such housing developments in their communities.
- There's a lack of affordable units in some communities as some landlords are reluctant to rent to people with mobile housing vouchers due to the bureaucracy and associated requirements.
- There is an insufficient volume of subsidized housing vouchers for low-income people to access.

#### Linkages:

- Massachusetts Association of Community Action Programs – (MASSCAP)
- Regional Housing Network (RHN)
- Citizens Housing & Planning Association (CHAPA)
- Massachusetts Association of Community Development Corporations (MACDC)
- MA Department of Housing & Community Development (DHCD)
- Massachusetts Housing & Shelter Alliance (MHSA)
- Local Housing Authorities
- Municipal (City and Town) planners
- Municipal appointed and elected executive officials
- Homes for Families
- MA Legislative Delegations
- Metropolitan Boston Housing Partnership
- Federal Department of Housing and Urban Development (HUD)

### Need: Financial Assistance for Renters and Homeowners

Strategic Goal: Connect program participants with the financial resources they need to successfully find and maintain safe and affordable housing.

#### Specific Objectives:

- FY2021 and FY2022
  - Increase the number of referrals to our Housing Consumer Education Center financial assistance programs, including Residential Assistance for Families in Transition, Emergency Rental Assistance Program and Emergency Rental and Mortgage Assistance.
  - Provide financial assistance to eligible applicants through HCEC programs for rent, mortgage and utility payments for eviction prevention and new move-ins.

- Provide loan assistance to elders and individuals with disabilities in MetroWest and the Cape & Islands regions, to enable recipients to continue living as independently as possible in their homes through the Home Modification Loan Program (HMLP).
  - Increase outreach to underserved communities about the LIHEAP program to increase enrollment.
  - Create an online portal for LIHEAP to facilitate the application process for applicants and communication with vendors.
  - Provide weatherization services, heating system repair and replacement, and appliance replacements to clients on Fuel Assistance or the discounted utility rate, referring eligible clients to the Home Modification Loan Program. Expand services to include installation of ductless mini-splits, where applicable.
- FY2023
    - Work with CSG to create an online portal that will allow folks to apply easier and for our vendors to have a more streamlined electronic resource for communicating with our agency regarding our applicants, payments, etc.

Service Delivery:

- Housing Consumer Education Center
- Energy Conservation Services
- LIHEAP
- Home Modification Loan Program

Service Gaps:

- The majority of respondents in our community needs assessment agreed that housing is too expensive and there needs to be more resources for subsidized/low-income housing to make it more affordable and accessible.
- Many towns and cities are preventing low-income housing making it difficult to find new properties, but also get people housed.

Linkages:

- MA Department of Housing & Community Development (DHCD)
- Community Economic Development Assistance Corporation (CEDAC)
- Metrowest Legal Services
- Self-Help Inc.
- BayPath Elder Services
- Council on Aging for all cities and towns where LIHEAP/ HMLP/ Weatherization Services are offered
- Advocates Inc.
- Wayside Youth and Family
- JRI
- Framingham Housing Authority
- Local Housing Authorities

- All-In Energy
- Paul Newman and Lifeway Mobility

## Need: Behavioral Healthcare Services

Strategic Goal: Provide culturally sensitive behavioral health care services to vulnerable populations through outpatient mental health and substance use clinics, residential recovery programs and peer recovery supports and services.

### Specific Objectives:

- FY2021 and FY2022
  - Set new guidelines, rules, and compliance requirements for clinicians to provide outpatient services during and after the COVID-19 pandemic.
  - Develop a comprehensive training program that encompasses diversity, telehealth and new technologies for staff across the entire division.
  - Review the clinical framework in the residential recovery programs with a focus on programming.
  - Adopt Same-Day access protocols for outpatient clinics.
  - Market behavioral health services to a broader audience in order to identify and recruit new staff, particularly BIPOC.
  - Continue to grow the Peer Recovery Coach Program and move the Framingham Recovery Support Center towards a client driven model.
- FY2023
  - Explore the feasibility of establishing a Certified Community Behavioral Health Center (CCBHC) and/or state CBHCs within the context of the state’s Roadmap for Behavioral Health Reform with a view to adapting our current outpatient service model.
  - Identify and establish ongoing relationships with external resources, newspapers, and organizations that cater to diverse populations.
  - Implement Dual Capability for the Co-Occurring Enhanced (COE) program to establish statewide standards.

### Service Delivery:

- Outpatient mental health and substance use clinics.
- Residential Treatment Programs - Sage House, Serenity House, Rhodes House, Co-Occurring Enhanced (COE).
- Peer Recovery Coaches.
- Framingham Recovery Support Center.

### Service Gaps:

- Information & Referral services (or center) for immigrants where people from diverse backgrounds can get information on a wide range of topics from the more traditional types we do but also about how to engage the system, local, state and federal services, community resources, etc. all in their own language.
- Health care workers - help clients across programs and services access primary health care services, coordinate care and assist with basic things like insurance coverage, transportation, and education.

#### Linkages:

- MA Department of Public Health
- MA Bureau of Substance Abuse Services
- MetroWest Health Foundation
- Behavioral Health Partners of MetroWest
- MassHealth
- Association for Behavioral Healthcare

### Need: Workforce Development

Strategic Goal: Develop workforce development programs that will help our program participants achieve equitable and increased economic self-sufficiency.

#### Specific Objectives:

- FY2021 and FY2022
  - Identify and connect program participants with skills training programs that meet the new employment opportunities presented by COVID-19.
  - Outreach to populations, including disabled, Black, Indigenous and Pacific Islander (BIPOC), women and other minority groups, disproportionately affected by COVID-19.
  - Identify gaps in needs around transportation, childcare, community education and skills training.
  - Expand and enhance ESL courses for immigrant communities as a means to expand their employment opportunities.
  - Provide microloans for small business operators, particularly from underserved populations, to start or expand their businesses through the relaunched SMOC Financial Services program.
  - Collaborate with Keefe Tech High School and Mass Bay Community College to provide higher education, ESL, and new skills to our program participants.
- FY2023
  - Partner with the Framingham Cultural and Community Center (FCCC) to provide workforce development opportunities for community members.

- Identify workforce development opportunities for disabled populations in our programs.
- Collaborate with area workforce development providers to expand the menu of services available to SMOC clients.
- Provide case management, employment supports, skills training and mentoring to participants in our Homeless Youth Program in partnership with local trade schools and programs.

Service Delivery:

- Competitive Integrated Employment Services (CIES)
- Secure Jobs
- Green Jobs Academy (GJA)
- Summer Jobs for Youth
- Joan Brack Adult Learning Center (JBALC) - HiSet and ESL classes

Service Gaps:

- Earnings for easily accessible jobs are typically below living wage rates which can sustain individuals and families.
- The pandemic has shown heightened job loss for low-income communities so there is a need for targeted workforce development programs.

Linkages:

- MassBay Community College
- Framingham State University
- MetroWest Regional Transit Authority
- Wayside Young Adult Resource Center – Tempo
- Local Workforce Investment Boards
- Joseph B. Keefe Technical High School

## Need: Food Security

Strategic Goal: Ensure that food security is guaranteed for the most vulnerable residents of the communities we serve by expanding access to affordable, healthy, adequate and nourishing food resources.

Specific Objectives:

- FY2021 and FY2022
  - Expand the services of OPCS Emergency Food Program, Loaves and Fishes and other community food programs to reach more vulnerable communities.
  - Continue to expand access to WIC benefits for all eligible populations in our service area.

- Increase the monthly WIC fruit and vegetable benefit for every active woman and child from \$11.00 per month to \$35.00 per month for four months.
  - Expand the self-checkout option for WIC Participants to Stop & Shop supermarkets to provide a safer and more confidential shopping experience.
  - Expand SNAP outreach and application assistance through UMass SNAP and National Community Action Partnership's SNAP Education and Training programs.
  - Continue to participate in the Greater Framingham Hunger Network to expand healthy food resources to vulnerable populations in our service area.
  - Expand the number of grocery store chains who allow WIC Participants to use the online order/curbside pickup to provide a safer and more convenient/confidential shopping experience.
  - Continue to collaborate with Lovin' Spoonfuls Food Rescue to deliver fresh fruits, vegetables and prepared foods to our MetroWest-area shelters and link with nutrition education.
- FY2023
    - Start the process to allow WIC Participants to use the online order/home delivery option at some grocery store chains to increase access to WIC benefits and food security especially for families who have transportation issues.
    - Hire a Nutritionist to work with homeless families in our emergency shelter system to provide nutrition education and information.

Service Delivery:

- WIC Program
- Open Pantry Community Services Emergency Food Pantry
- Open Pantry Community Services Loaves & Fishes Community Meals Program
- SNAP Application Program
- Greater Framingham Hunger Network
- Lovin' Spoonfuls Food Rescue

Service Gaps:

- Many respondents in our community assessment have access to food stamps (SNAP) but it is barely enough to get them through the month so many resort to food pantries and family/friends for additional assistance.
- Food pantries don't have a variety of food to choose from, and some focus group respondents remarked that most of the food is either expired or outdated, making balanced eating for those in need impossible.
- Many people who need access to food pantries face difficulties getting to them because of the hours of operation and/or transportation barriers.

Linkages:

- Greater Framingham Hunger Network
- Local food pantries

- Greater Boston Food Bank
- Worcester County Food Bank
- University of Massachusetts
- National Community Action Partnership
- Lovin' Spoonfuls Food Rescue
- The Food Bank of Western Massachusetts

## Funding Strategy

According to SMOC's FY20 Audit, revenues were \$108,188,329 with total expenses of \$106,331,699. SMOC's fiscal strength and capacity comes from the diversity of our programs, which are all mission-oriented to help meet our clients' needs in order to help them become more self-sufficient and productive members of society. In FY20 SMOC managed \$85,580,533 in federal, state and local contracts for funding, representing over 79% of its revenue. Through the Housing Corporation, SMOC earns revenue from real estate development, rental property income and sublease income which contributes to the sustainability of our housing programs. In FY20, SMOC received \$7,677,194 in rental revenue.

Through a Resource Development department of six full-time professionals, SMOC sets ambitious fundraising goals to garner considerable new and increased income from individual donors, foundations, corporations, events and annual appeals benefiting various SMOC programs. In FY21, SMOC's overall resource development goal was \$2,501,000 in revenue from the development of these revenue sources and others in our primary service areas. We have already surpassed that goal with over \$2.7 million raised to date.

The regular CSBG grant funding will continue to be used to support the executive staff who provide overall support and coordination for the agency's programs and services. CARES funding will be used for select programs in support of client assistance, operations and staffing costs.

We will continue to work toward maintaining good client and program outcomes and aggressively pursue funding opportunities for our programs and services.

## Agency Level Goals

### Need: Technology and Internet Access

Strategic Goal: Ensure the provision of secure and efficient computer technology and internet access for staff and clients.

#### Specific Objectives:

- FY2021 and FY2022
  - Provide computer hardware and software to staff to enhance their ability to work on-site and remotely.
  - Provide computer hardware and software to clients in residential programs to enhance their connections with service providers, education, workforce development and other resources.
  - Manage cybersecurity risks and data protection to minimize data breaches.
  - Provide regular cybersecurity training and awareness for staff and clients.
  - Create awareness program for employees on social media usage in the workplace.
  - Migrate files stored on SMOC's remote in-house servers to Microsoft secure hosted platform to support SMOC's remote and onsite workforce.
  - Upgrade wireless and internet bandwidth to primary SMOC locations.
- FY2023
  - Expansion of Microsoft's 365 tools such as MS Teams and SharePoint to promote file sharing and collaboration.
  - Evaluation of remaining on-site systems for migration to cloud-based platforms.
  - Continue to promote security best practices through training and data safeguarding awareness campaigns.

### Need: Internal Capacity

Strategic Goal: Create a diverse, talented and skilled workforce that can effectively implement the mission of the agency by providing services and programs that enhance the capacity of low-income and vulnerable populations to move toward increased economic self-sufficiency.

#### Specific Objectives:

- FY2021 and FY2022
  - Ensure that recruitment policies and practices are designed to attract a diverse workforce that reflects the communities we serve.
  - Create and implement policies and practices that ensure that staff are adequately compensated in order to increase retention.
  - Institute cross training of staff to cover vacation time and absenteeism.

- Create career pathways that enhance the advancement of diversity of the agency's workforce, particularly in leadership positions.
- Continue to work with the Diversity, Access and Inclusion Steering Committee to identify and conduct relevant training for all staff.
- FY2023
  - Provide training for Board members in the areas of finances, real estate transactions, roles and responsibilities and, good assessment tools to evaluate implementation of goals.
  - Improve the Volunteer experience by providing clearer expectations and having more staff on site.
  - Focus on our Onboarding Process and New Hire Orientation which provide an engaging opportunity to establish a strong connection between the employee and employer.

## Plan Monitoring and Reporting

Primary responsibility for monitoring and reporting implementation of the 2021-2023 CARSP will lie with the Planning Unit working closely with Division Directors and Program Directors/Managers. The CARSP Planning Committee, which was created to provide oversight and guidance for the CARSP process, will continue to monitor implementation of the Strategic Plan. The full Board will be provided with annual updates regarding implementation of the Strategic Plan.

Date	Activity	Responsibility
June 22, 2021	Present FY2021-2023 Strategic Plan to SMOC Board for review and approval.	Planning & Compliance Staff
July 2, 2021	Submit SMOC Board-approved FY2021-2023 Strategic Plan to DHCD.	Planning & Compliance Staff
October 2021	Prepare and present FY21 Community Action Plan (CAP) Year End Report to SMOC Board for review and approval then submit to DHCD.  Develop and present FY22 CAP Workplan to SMOC Board for approval then submit to DHCD.	Planning & Compliance Staff; Division Directors; Component Managers
April/May 2022	Prepare and present FY22 CAP, 6-Month Report to SMOC Board	Planning & Compliance Staff
October 2022	Prepare and present FY22 CAP Year End Report to SMOC Board for review and approval then submit to DHCD.  Develop and submit FY23 CAP Workplan to SMOC Board for approval then submit to DHCD.	Planning & Compliance Staff; Division Directors; Component Managers
April/May 2023	Prepare and present FY23 CAP, 6-Month Report to SMOC Board	Planning & Compliance Staff
October 2023	Prepare and present FY23 CAP Year End Report to SMOC Board for review and approval then submit to DHCD	Planning & Compliance Staff; Division Directors; Component Managers