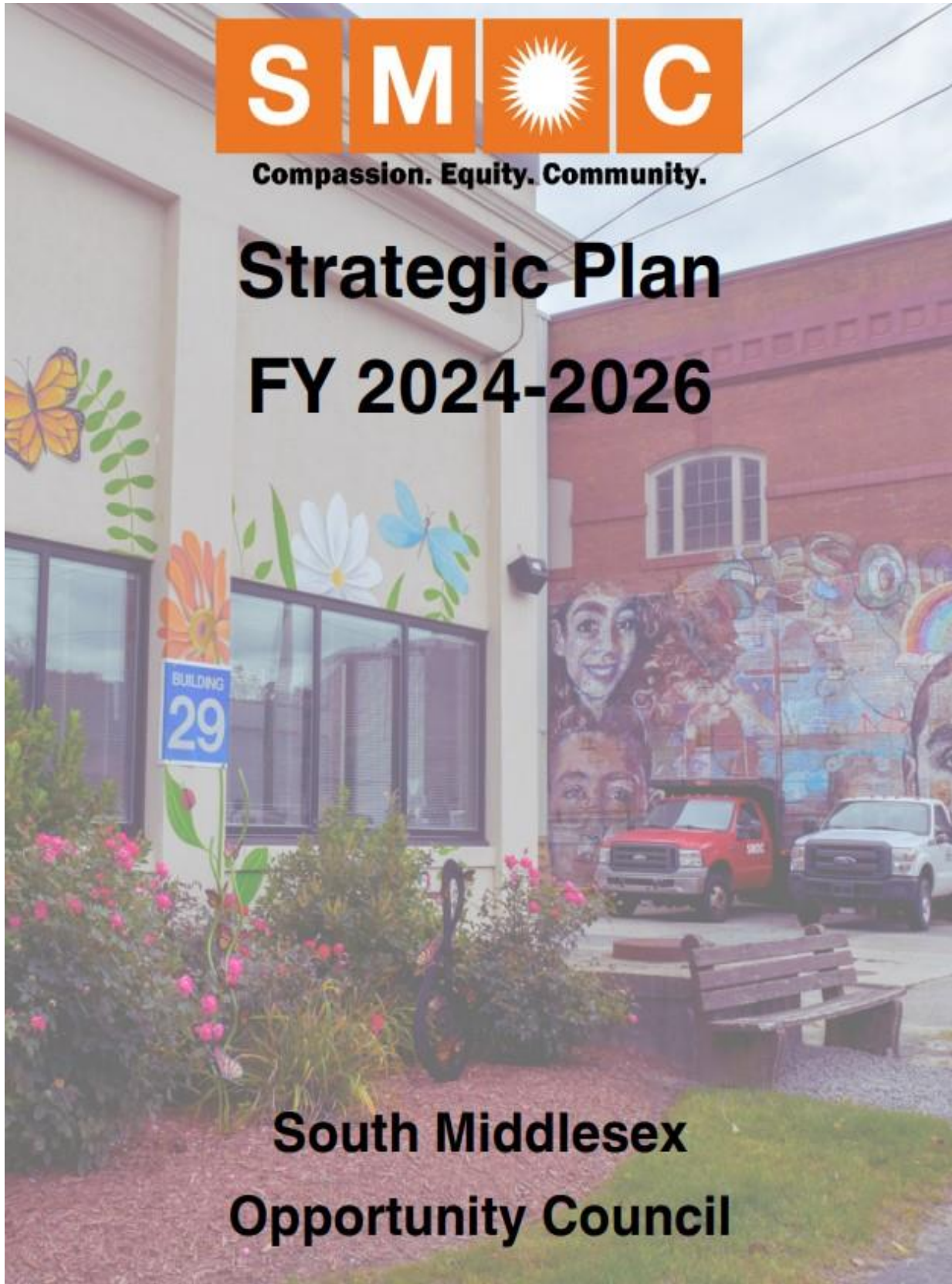




Compassion. Equity. Community.

Strategic Plan FY 2024-2026



**South Middlesex
Opportunity Council**

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Executive Summary

SMOC “will improve equity, wellness and quality of life for diverse individuals and families by providing advocacy, education and a wide range of services; building a community of support and inclusion; and creating awareness to combat poverty through partnerships and coalitions with other organizations.” Our new tagline is “Compassion. Equity. Community.”

As a Community Action Agency, we are required to conduct a comprehensive community and internal needs assessment every three years. The assessment provides information about the causes and conditions of poverty within the communities we serve as well as our capacity to provide appropriate services and programs. This information is used to develop a comprehensive strategic plan that is community focused, targeted and responsive to current needs.

A 20-member Planning Committee comprised of members of the Board, Executive Team, Senior Management and Planning and Compliance staff was created and charged with steering, overseeing and coordinating the Community Assessment Report & Strategic Plan process. The Planning Guide developed by the Executive Office of Housing & Livable Communities (EOHLC) provided the framework for the implementation of the needs assessment and development of the strategic plan.

The FY 2024-2026 Strategic Plan was developed from the results of the FY2024-2026 Community Needs Assessment with an inclusive, equity-based lens. The Plan focuses on the top five needs that emerged from the community needs assessment, namely affordable housing, childcare, jobs, ability to pay heating and utility bills and transportation.

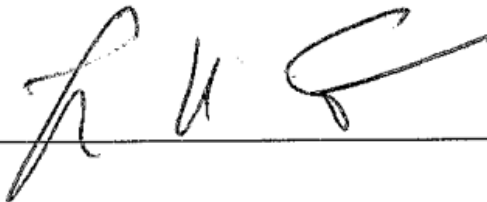
The key needs identified in the internal needs assessment centered around staff hiring, retention, training and compensation; communication at all levels – board, management, staff; fundraising, public relations and visibility in the community; diversity in board membership; long term planning for financial viability and volunteer training opportunities.

Without adequate financial resources, it will be challenging to achieve the goals and objectives of the strategic plan. We have outlined a comprehensive funding strategy in the plan that includes traditional funding sources from federal, state and local government as well as a robust resource development strategy.

Board Authorization

The Board of Directors of South Middlesex Opportunity Council reviewed and adopted the FY2024-2026 Strategic Plan at the board meeting held on Tuesday, December 19, 2023, in Framingham, MA.

Larry Scult, Board Chair:

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

Date: December 19, 2023, Framingham, MA

Introduction

Agency Description

Founded in 1965 in Framingham, Massachusetts, South Middlesex Opportunity Council (SMOC) is a nonprofit corporation with a 501 (C)(3) federal tax designation, a federally designated Community Action Agency (CAA) for the MetroWest region and a certified Ch.40H statewide Community Development Corporation (CDC).

Our core mission is to work with individuals and families from diverse backgrounds to maximize self-sufficiency and economic independence, especially for the most vulnerable in our society, including those with disabilities and those experiencing homelessness/displacement. To achieve our mission, SMOC administers over 60 major programs targeted to low-income individuals and families to assist them in their efforts to become self-sufficient and economically independent. These programs include Head Start and Childcare, Home Energy Assistance Program, Heating Emergency Assistance Retrofit Task Weatherization Assistance Program (HEARTWAP), First-Time Home Buyer, Rental Assistance, Individual and Family Shelter and Housing, General Education Development (GED), High School Equivalency Test (HiSET) and English as a Second Language (ESL) classes, Workforce Development, Microloan Fund, Women, Infants and Children (WIC) Nutrition Services, Behavioral Healthcare Services, Substance Use Disorder Residential Treatment and Domestic Violence services.

Currently, SMOC has a variety of programs operating in the MetroWest region of the state as well as Lowell, Springfield, Worcester and their surrounding communities and North Worcester County. Our programs are managed and operated by a diverse staff of approximately 730 dedicated human service workers, volunteers and college interns. In FY2022, SMOC served nearly 50,000 residents in more than 200 communities across the Commonwealth. The projected budget for FY2023 is approximately \$141,000,000.

SMOC owns and manages over 1,600 units of housing that provide affordable, safe and secure homes for individuals and families. Included within this housing portfolio are many different emergency shelters, transitional housing for individuals and families, sober housing units and permanent affordable housing rentals. Housing programs are integrated with case management and connection to SMOC wraparound services. Services offered in the housing program are designed to assist residents in their efforts to achieve self-sufficiency and economic independence.

Mission Statement

In 2022, staff participated in a review of our mission statement and tagline which was then presented to the Board of Directors and unanimously approved on April 19, 2022. The new mission statement reads, “South Middlesex Opportunity Council will improve equity, wellness and quality of life for diverse individuals and families by providing advocacy, education and a wide range of services; building a community of support and inclusion; and creating awareness

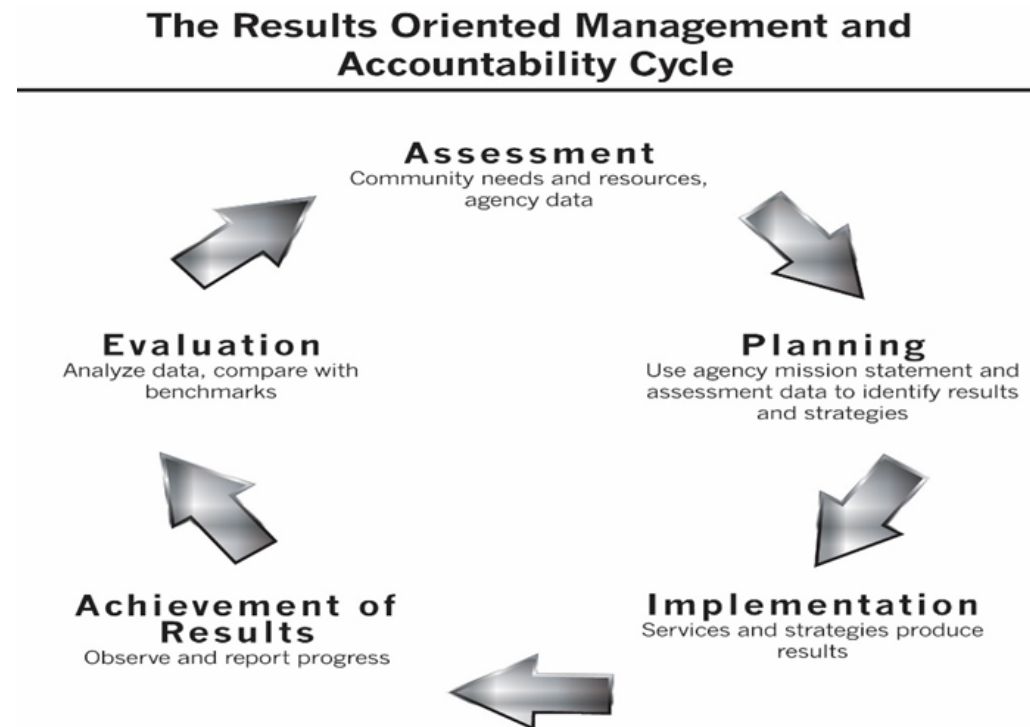
to combat poverty through partnerships and coalitions with other organizations.” The new tagline is “Compassion. Equity. Community.”

Vision Statement

SMOC’s vision statement reads, “Organizing Resources for Social Change and Economic Independence.”

Community and Internal Needs Assessment Process

The Results Oriented Management and Accountability (ROMA) Cycle (included below for reference) provides a performance management framework for continuous growth and improvement among Community Action Agencies. A comprehensive assessment of community and internal agency needs is the first step in the ROMA cycle to gain a better understanding of needs and opportunities to improve lives. We can then develop appropriate programs, implement them, report the results, evaluate their impact and adjust as needed.



A 20-member Planning Committee comprised of members of the Board, Executive Team, Senior Management and Planning and Compliance staff was created and charged with steering, overseeing and coordinating the CARSP process. An internal kickoff meeting was held in October 2022 to establish the framework and officially begin the community needs assessment and strategic planning process. The Planning Guide developed by the Executive Office of Housing and Livable Communities (EOHLC) was reviewed in this initial meeting. A number of staff also attended EOHLC’s Community Assessment Report and Strategic Plan (CARSP) Kickoff

Training Series in October of 2022 organized for all the community action agencies. The Planning Committee meets on a monthly basis to review progress and the various deliverables. Based on the size of the population living below the poverty line in our CSBG service area, the ideal sample size for the Community Needs and Customer Satisfaction Survey was calculated at 374, at a 95% confidence level. The survey was designed in SurveyMonkey and, for the first time, quick response (QR) codes were generated and distributed in addition to the regular web link, for ease of access. The links were posted on the SMOC agency website and social media platforms including Facebook, Twitter and Instagram. Paper copies of the survey were also available for program staff to distribute to clients within the MetroWest region, Lowell, Worcester and Springfield. Given the diverse client base served, the survey was translated and made available in 5 languages; English, Spanish, Brazilian Portuguese, Haitian Creole and French. Data collection commenced in January 2023 and ended at the beginning of April 2023. A number of partner agencies who also serve low-income populations were contacted regarding administering the survey to their clients, however efforts were unsuccessful.

The Community Needs and Customer Satisfaction Survey (Community Assessment Report Appendix 1) collected information about demographics, housing, health care, COVID-19, food security, employment, transportation, income, debt, safety, childcare, social media and use of and satisfaction with SMOC services. Similar to the last needs assessment, all Community Action Agencies were required to include a set of common questions to provide a statewide profile of community needs.

The Community Organizations Survey (Community Assessment Report Appendix 2) was administered online through SurveyMonkey from January to April 2023. Over 100 organizations were contacted, inclusive of community and faith-based organizations, state and local government agencies, financial institutions, educational institutions, legislators, police departments and health entities among others. Each was provided contextual explanations and background to the CARSP as well as the link to the online survey. Organizations were requested to describe the populations they serve, identify their geographic service area and classify the nature of the services provided. In terms of community needs, they were asked to rank the needs in various sectors such as housing, healthcare, financial and economic concerns, childcare, nutrition, domestic violence and transportation. Ranking ranged from 1-High to 5-Not Applicable. They were also requested to identify other community needs and suggest strategies to avoid duplication and enhance collaboration with SMOC.

To supplement the data from the quantitative surveys, focus groups were conducted in March and April of 2023 with clients from four SMOC programs. Due to staffing and time constraints, selected programs were each located in Framingham – Co-Occurring Enhanced Women’s Residential Dual Diagnosis Treatment Program; Anchored in Recovery Peer Support Recovery Center; a co-ed Supportive Housing Program; and Turning Point Emergency Shelter for single, unaccompanied men. The groups were conducted in English and facilitated by program staff.

The discussion revolved around food, housing, employment, education and transportation – issues which had surfaced from the Community Needs and Customer Satisfaction Survey – and community strengths/assets/resources (Community Assessment Report Appendix 3). Data from focus groups held at SMOC’s Framingham Community and Cultural Center was also reviewed as part of the community needs assessment. In addition, Planning Department staff participated in the community needs discussion facilitated by MASSCAP’s Planners Community of Practice in March.

Key Stakeholder interviews were conducted in April with leaders from several area partner agencies. We solicited information about key needs in their respective communities, community-level resources to address these needs and ideas for interagency collaboration, partnerships and service integration (Community Assessment Report Appendix 4). The following individuals participated in the stakeholder interviews:

- Reverend Dr. J. Anthony Lloyd, Greater Framingham Community Church
- Allison Parks, Wayside Youth and Family Support Services
- Stephanie Hirshon, MetroWest Chamber of Commerce
- Jon Fetherston, MetroWest Regional Transit Authority

The Board Survey (Community Assessment Report Appendix 5) was also designed in SurveyMonkey and administered from February to March 2023. Board members were asked how long they have served on the Board and the sector they represent, to rate various aspects of the agency and its operations, to comment on areas they rated as “Disagree” or “Strongly Disagree”, to describe three strengths of the agency and to describe three areas where they would like to see improvements within the agency.

The Staff Survey (Community Assessment Report Appendix 6) was designed and administered in SurveyMonkey from February to April 2023. SMOC’s President and CEO emailed staff explaining the context and purpose of the survey as well as the link to access the survey. Staff were asked to identify the regions where they work and provide demographic information, to describe their role, to rate various aspects of their specific program environment and general work environment, to identify additional programs and services that they felt were needed, comment on areas they rated as “Disagree” or “Strongly Disagree,” and offer suggestions to improve the work environment at SMOC.

We also administered a Volunteer Survey (Community Assessment Report Appendix 7) in SurveyMonkey as part of the internal needs assessment from February to April 2023. SMOC’s President and CEO emailed managers explaining the context and purpose of the survey and provided the link for volunteers to complete the survey. Volunteers were asked to identify the programs they volunteered in and provide demographic information, to rate various aspects of their volunteer experience, to identify additional programs and services that they felt were

needed, to comment on areas they rated as “Disagree” or “Strongly Disagree,” and offer suggestions to improve the volunteer experience at SMOC.

Assessment Summary – Key Findings

The main objective of the surveys was to identify the key needs impacting people in the communities we serve. Respondents were to choose all of the top needs impacting people in their community. The results obtained reflected affordable housing as the top need (70.8%) followed by childcare (53.2%), access to jobs (52.4%) coupled with education and training opportunities to secure a job or better job (44.9%), ability to pay heating and utility bills (49.7%) and transportation (43.8%). This is the third consecutive time that affordable housing has emerged as the top need, as was the case in our 2018-2020 and 2021-2023 needs assessment.

Individual/Family/Community Level Needs Statements

- Affordable housing (70.8%) – At the Individual/Family Level, low-income individuals and families need safe, decent housing that is affordable. At the Community Level, communities do not have an adequate stock of affordable housing to meet current and future demand.
- Childcare (53.2%) – At the Individual/Family Level, low-income individuals and families need access to childcare that is safe, affordable, accessible and of a high quality. At the Community Level, there is a need for more subsidies and vouchers.
- Jobs (52.4%) – At the Individual/Family Level, low-income individuals and families need jobs paying living wages that can sustain and meet their needs. At the Community Level, there is a need to ensure that employers pay living wages.
 - Training or education to get a job or better job (44.9%) – At the Individual/Family Level, low-income individuals and families do not have the necessary credentials to access well-paying jobs.
- Ability to pay heating and utility bills (49.7%) – At the Individual/Family Level, low-income individuals and families need assistance to pay their energy bills and to avoid the risk of utility shut-offs. At the Community Level, there is a need to expand discount and benefit programs.
- Transportation (43.8%) – At the Community Level, there is limited public transportation that is accessible and affordable to community members.
- Access to food (40.9%) – At the Individual/Family Level, low-income individuals and families lack access to affordable, healthy and nutritious foods. At the Community Level, low-income communities need access to stores that sell affordable, healthy and nutritious foods.
- Mental health services (40.1%) – At the Individual/Family Level, individuals and families need access to mental health services that are affordable, accessible and culturally appropriate. At the Community Level, there are limited mental health facilities to meet demand.

Outcomes, Strategies and Actions

Top Need 1 - Affordable Housing

- Individual/Family Level Need/ Service Gap identified by 70.8% of respondents to the Community Needs and Customer Satisfaction Survey.
 - Low-income individuals and families lack safe, decent housing that is affordable.
 - There is an insufficient volume of subsidized housing vouchers for low-income people to access.
 - Although not directly identified in the community needs assessment, the migrant family crisis is emerging as a high priority need in many communities across the state.

- Community Level Need/ Service Gaps
 - Communities do not have an adequate stock of affordable housing to meet current and future demand.
 - There is lack of affordable units in some communities as some landlords are reluctant to rent to people with mobile vouchers due to the associated requirements.
 - Subsidized, affordable housing stock is insufficient to meet the need as some communities oppose the construction of such housing developments in their communities.

- Strategic Three-Year Goal/Outcome
 - 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 served.

- Service Delivery System
 - Family Self Sufficiency Program
 - First Time Homebuyers Program
 - Flexible Services Program
 - Housing Consumer Education Center (HCEC)
 - Rapid Transition of Individuals Program
 - South Middlesex Non-Profit Housing Corporation
 - Supporting Neighborhood Opportunity in Massachusetts Program (SNO MASS)

- Linkages
 - Citizens Housing & Planning Association (CHAPA)

- Community Teamwork, Inc (CTI) Rental Assistance/Subsidized Housing Programs
 - Executive Office of Housing and Livable Communities (EOHLC)
 - Federal Department of Housing and Urban Development (HUD)
 - Homes for Families, Inc.
 - Local Housing Authorities
 - Massachusetts Association of Community Action Programs (MASSCAP)
 - Massachusetts Association of Community Development Corporations (MACDC)
 - Massachusetts Housing & Shelter Alliance (MHSA)
 - Massachusetts Legislature delegations
 - Metropolitan Boston Housing Partnership (MBHP)
 - Municipal (City and Town) planners
 - Municipal appointed and elected executive officials
 - Regional Housing Network (RHN)
- Specific Objectives
 - FY2024
 - Individual/Family Level
 - Increase the number of permanent and transitional housing placements in the individual and family shelter systems.
 - Continue referring eligible Lowell Transitional Living Center (LTLC) Emergency Shelter clients to the Rental Assistance and Homeless Youth Programs operated by Community Teamwork (CTI).
 - Implement new application process for Flexible Funds provided by HCEC/EOHLC.
 - 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.
 - Provide pathways to increase opportunities for home ownership and building generational wealth through increasing the proportion of Black, Indigenous, people of color (BIPOC) in the First Time Homebuyers Program.
 - Work with EOHLC to increase the number of federal and state subsidized housing mobile and project-based vouchers for eligible persons within our catchment area.
 - Community Level
 - Continue to advocate for safe and affordable housing opportunities across the Commonwealth of Massachusetts.

- Explore funding opportunities under the Housing Bond Bill which is designed to support new housing construction, housing preservation and supportive services for tenants.
- FY2025
 - Individual/Family Level
 - Workshops for Landlords to talk about SMOC’S mission and financial assistance.
 - Pilot educational workshops for clients around being a good tenant, Tenant rights and SMOC’S wrap around services.
 - Hire a dedicated staff person to short term case manage clients who need assistance with housing search.
 - Increase the number of current participants that purchase homes through our Family Self-Sufficiency Homeownership track.
 - Community Level
 - Continue to advocate for safe and affordable housing opportunities across the Commonwealth of Massachusetts.
 - Implement the schedule of real estate improvements across SMOC Non-Profit Housing Corporation’s portfolio in all regions. Expand our project-based sector by acquiring more project-based properties and creating a project-based support team.
 - Develop additional, affordable housing options across our service regions in partnership with area providers.
 - Hire a dedicated staff person within HCEC to offer outreach support to regional partners and informational workshops internally and externally.
- FY2026
 - Individual/Family Level
 - Expand offered workshops for Landlords to talk about SMOC’S mission and financial assistance.
 - Provide educational workshops for clients around being a good tenant, Tenant rights and SMOC’S wrap around services.
 - Hire a dedicated staff person to short term case manage clients who need assistance with housing search.
 - Community Level
 - Continue to advocate for safe and affordable housing opportunities across the Commonwealth of Massachusetts.

Top Need 2 – Childcare

- Individual/Family Level Need/ Service Gap identified by 53.2% of respondents to the Community Needs and Customer Satisfaction Survey.
 - Low-income individuals and families need access to childcare that is safe, affordable, accessible and of a high-quality.
- Community Level Need/ Service Gaps
 - There is a need for more subsidies and vouchers for low-income and vulnerable families.
- Strategic Three-Year Goal/Outcome
 - Low-income individuals and families have access to childcare that is safe, affordable, accessible and of a high quality.
- Service Delivery System
 - SMOC Childcare - Center Based and Family Childcare
 - SMOC Head Start- Center and Home Based
- Linkages
 - Federal Office of Head Start
 - Massachusetts Association of Early Education and Care (MADCA)
 - Massachusetts Department of Early Education and Care (EEC)
 - Massachusetts Head Start Association
 - Massachusetts Head Start State Collaboration Office (MA HSSCO)
 - National Association for the Education of Young Children (NAEYC)
 - Strategies for Children
- Specific Objectives
 - FY2024
 - Individual/Family Level
 - Increase capacity with our priority populations such as homeless and refugee populations
 - Increase school readiness goals for children entering kindergarten
 - Community Level
 - Continue to advocate for safe and affordable, high-quality childcare across the Commonwealth of Massachusetts.
 - FY2025
 - Individual/Family Level

- Maintain quality of service delivery for all children.
- Explore the feasibility of incorporating Early Head Start into our existing programs.
 - Community Level
 - Advocate for allowing waivers for parent payments especially for families and caregivers at or below 150% of the federal poverty level.
 - Reduce paperwork and bureaucracy to streamline eligibility and enrollment processes for individuals and families accessing childcare assistance.
- FY2026
 - Individual/Family Level
 - Begin the implementation of incorporating Early Head Start into our existing programs.
 - Community Level
 - Partner with Framingham Public Schools to implement the pre-Kindergarten program to increase enrolment.

Top Need 3 - Jobs

- Individual/Family Level Need/ Service Gap identified by 52.4% of respondents to the Community Needs and Customer Satisfaction Survey.
 - Low-income individuals and families are not able to access jobs that pay living wages to sustain and meet their needs.
 - Low-income individuals and families need improved access to training and education to receive necessary credentials to access well-paying jobs as identified by 44.9% of respondents to the Community Needs and Customer Satisfaction Survey.
- Strategic Three-Year Goal/Outcome
 - Develop workforce development programs that will help our program participants achieve equitable and increased economic self-sufficiency.
 - Low-income individuals and families acquire the necessary credentials to access well-paying jobs.
- Service Delivery System
 - Competitive Integrated Employment Services (CIES)
 - Green Jobs Academy (GJA)
 - Joan Brack Adult Learning Center (JBALC) - HiSet and ESL classes
 - Secure Jobs
 - Summer Jobs for Youth

- Linkages
 - Christo Driving School
 - Framingham State University
 - Joseph B. Keefe Technical High School
 - Local Workforce Investment Boards
 - Massachusetts Bay Community College
 - MassHire Central Career Center (Worcester)
 - MassHire Framingham Career Center
 - MetroWest Regional Transit Authority
 - Wayside Young Adult Resource Center – Tempo

- Specific Objectives
 - FY2024
 - Individual/Family Level
 - Continue to identify and connect program participants with relevant skills training programs.
 - Collaborate with the Framingham Cultural and Community Center (FCCC) to provide workforce development opportunities for community members.
 - Identify workforce development opportunities for persons living with disabilities in our programs.
 - Collaborate with area workforce development providers to offer career exploration opportunities.
 - Provide case management, employment support, skills training and mentoring to participants in our Homeless Youth Program in partnership with local trade schools and programs.
 - Expand and enhance English as a Second Language (ESL) courses for immigrant communities.
 - Community Level
 - Participate in key stakeholder coalitions focused on addressing barriers to employment and access to transportation.
 - Collaborate with Joseph B. Keefe Technical High School and Massachusetts Bay Community College to provide continuing education and professional development courses, for example Early Education and Care (EEC), Licensed Practical Nurse (LPN), Home Health Aide (HHA) and Cybersecurity certifications.
 - FY2025
 - Individual/ Family Level

- Expand outreach to historically marginalized and underrepresented populations and those disproportionately affected by the COVID-19 pandemic.
- Conduct life skills and career-oriented workshops to aid clients in a sustainable career path and income.
- Explore developing and implementing a New Resident Orientation Program to orient incoming community members to the area and build rapport within the community.
- Community Level
 - Partner with local businesses and corporations to build a supportive network for clients.
 - Collaborate with successful local businesses to produce educational resources to introduce clients to a variety of industries.
- FY2026
 - Individual/ Family Level
 - Provide microloans for small business operators, particularly from underserved populations, to start or expand their businesses through the relaunched SMOC Financial Services program.
 - Assist clients in sourcing local internships and apprenticeships.
 - Community Level
 - Sustain partnerships with local businesses and companies.

Top Need 4 - Ability To Pay Heating and Utility Bills

- Individual/Family Level Need/ Service Gaps identified by 49.7% of respondents to the Community Needs and Customer Satisfaction Survey.
 - Low-income individuals and families are not able to pay their energy bills, which leaves them vulnerable to utility shut offs.
- Community Level Need/ Service Gaps
 - The Community has limited discount and benefit programs to meet demand.
- Strategic Three-Year Goal/Outcome
 - Low-income individuals and families are able to pay their energy bills with no risk of utility shut offs.
- Service Delivery System
 - Energy Conservation Services (ECS)
 - Home Energy Assistance Program (HEAP)

- Housing Consumer Education Center (HCEC)
- Linkages
 - Executive Office of Housing and Livable Communities (EOHLC)
 - Massachusetts Association of Community Action Programs (MASSCAP)
 - Oil and Utility Companies
- Specific Objectives
 - FY2024
 - Individual/Family Level
 - Assist families and determine eligibility for the Home Energy Assistance Program (HEAP) within required timeframes.
 - Prioritize emergency applications and provide timely updates to applicants.
 - Increase the number of eligible families and individuals who can access RAFT funds (up to \$7k within a 12-month period) to prevent shut off (up to 250 gallons of oil).
 - Increase the number of eligible individuals and families who can access FEMA funds for electric/gas/water bills and emergency oil delivery up to 100 gallons.
 - Refer clients to HCEC advocacy for support connecting to utility companies to apply for discount rates, negotiate payment arrangements and/or seek any medical/child protection to help avoid disconnection.
 - Ensure client files and document requirements are received and processed in a timely manner.
 - Community Level
 - Strengthen the partnership with United Way in the operations of the Marlborough satellite office which provides HCEC and HEAP services.
 - Provide potential clients and HEAP program community partners, including Massachusetts Councils on Aging (MCOA), with proactive communication related to program eligibility, application availability, submission requirements and timeframes.
 - Strengthen internal/external (EOHLC) relationship to ensure optimal program efficiencies and program compliance.
 - FY2025
 - Individual/Family Level

- Provide clients with high quality customer service throughout the application and approval process.
 - Connect eligible clients receiving HEAP assistance to additional resources such as Weatherization Services and the Appliance Management Program.
 - Community Level
 - Provide community partners with information about program changes, updates and availability.
- FY2026
 - Individual/Family Level
 - Increase the number of individuals and families eligible for HEAP, RAFT, FEMA and other utility support services.
 - Community Level
 - Exchange best practices with community partners to strengthen program functioning and achieve model status.

Top Need 5 - Transportation

- Individual/Family Level Need/ Service Gap identified by 43.8% of respondents to the Community Needs and Customer Satisfaction Survey.
 - Low-income individuals and families are unable to access affordable transportation for employment, childcare and other needs.
- Community Level Need/ Service Gap
 - There is limited public transportation that is accessible and affordable to community members.
- Strategic Three-Year Goal/Outcome
 - Public transportation is available, accessible to and affordable for community members.
- Service Delivery System
 - SMOC Transportation Pilot Program
- Linkages
 - All World Express, LLC.
 - Lowell Regional Transit Authority
 - Lyft, Inc.
 - MetroWest Regional Transit Authority

- Pioneer Valley Transit Authority
- Tommy’s Taxi Inc.
- Uber Technologies, Inc.
- Worcester Regional Transit Authority

- Specific Objectives
 - FY2024
 - Individual/Family Level
 - Work with program managers and case managers to identify eligible program participants for the newly funded Transportation Pilot Program.
 - Connect SMOC program participants with free rides using area transportation companies.
 - Community Level
 - Establish partnerships with area transportation companies.
 - FY2025
 - Individual/Family Level
 - Work with program managers and case managers to increase the number of eligible participants for the Transportation Pilot Program.
 - Community Level
 - Seek additional funding from various sources for program continuance and expansion.
 - FY2026
 - Individual/Family Level
 - Help program participants become more independent by providing financial assistance to pay for driving lessons, obtain drivers licenses and pay excise tax and the like.
 - Community Level
 - Advocate for affordable and accessible transportation options for SMOC program participants.

Agency Level Goals

- Top Agency Level Needs identified by respondents to the Board, Staff and Volunteer Surveys:
 - Staff would like to see more manageable workloads.
 - Increased opportunities for training, advancement and pathways for promotion for staff and management.
 - Improved communication among management, staff and departments across the agency.
 - Competitive wages that are commensurate with staff qualifications, responsibilities and workload.
 - Increased management support and accessibility.
 - Expanded and improved fundraising activities to better showcase the benefits of the Agency's services within the communities.
 - Increased outreach and recruitment to fill staff vacancies and improve effective delivery of services and program implementation.
 - Increased opportunities for Board Members to learn about agency operations.
 - Improved community perception of agency programs and services.

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

- Specific Objectives
 - FY2024
 - Ensure that recruitment policies and practices are designed to attract a diverse workforce that reflects the communities we serve to increase internal capacity.
 - 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 Department of Human Resources and the Diversity, Equity and Inclusion (DEI) Steering Committee to identify and conduct relevant training for all staff.
- Provide training for Board members in the areas of finances, real estate transactions, roles and responsibilities and assessment tools to evaluate implementation of goals.
- Improve the volunteer experience by providing clearer expectations of roles and having more staff on site.
- Focus on Staff Onboarding and New Hire Orientation which provide an engaging opportunity to establish a strong connection between the employee and employer.
- Hire a Director of Communications to focus on public relations and increasing the visibility of SMOC in the community.
- FY2025
 - Increase staff wages to improve competitiveness and retention.
 - Provide staff training opportunities for advancement.
 - Provide increased training opportunities and resources for volunteers.
 - Increase the level of security at building entrances.
 - Increase communication from program staff to volunteers.
 - Increase department's allocated training budgets for providing role specific training and required certifications.
 - Promote professional development opportunities and pathways for promotion.
- FY2026
 - Actively plan for long-term financial viability.
 - Enhance public relations and SMOC's image in the community.
 - Partner with funders to ensure program compliance requirements are met by establishing a system to monitor, assess and address compliance requirements across the agency's programs.

Funding Strategy

According to SMOC's FY23 Audit, total assets were valued at \$140,401,628 and total liabilities and net assets at \$113,350,790. 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 FY23 SMOC managed \$133,591,339 in federal, state and local contracts for funding, representing 86% 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 FY23, SMOC received \$7,554,953 in rental income.

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 and corporations through grant proposals, individual solicitations, special events, direct mail and social media appeals benefiting various SMOC programs. In FY24, SMOC's overall resource development goal is \$2,740,000 in revenue from the development of these revenue sources and others in our primary service areas.

Our strategy is evolving toward developing a flexible and diverse portfolio of funders and funding, with an eye toward creating a robust Annual Fund that provides unrestricted funding for our programs and services. This flexibility is important for an organization that works in the front lines in responding to crises, such as the family shelter crisis that emerged in late 2022.

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. We will continue to work toward achieving and maintaining positive client and program outcomes and aggressively pursuing funding opportunities for our programs and services.

Next Steps: Plan Monitoring and Reporting

Primary responsibility for monitoring and reporting implementation of the 2024-2026 CARSP will lie with the Planning & Compliance 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
December 19, 2023	Present FY2024-2026 Strategic Plan to SMOC Board for review and approval.	Planning & Compliance Staff
December 31, 2023	Submit Strategic Plan Update Acknowledgement Form to EOHLC.	Planning & Compliance Staff
April/May 2024	Prepare and present FY24 Period 2 CAP to SMOC Board	Planning & Compliance Staff; Division Directors; Program Directors & Managers
October 2024	Prepare and present FY24 Period 3 CAP to SMOC Board for review and approval, submit to EOHLC. Develop and submit FY25 Period 1 CAP to SMOC Board for approval, submit to EOHLC.	Planning & Compliance Staff; Division Directors; Program Directors & Managers
April/May 2025	Prepare and present FY25 Period 2 CAP to SMOC Board	Planning & Compliance Staff; Division Directors; Program Directors & Managers

October 2025	<p>Prepare and present FY25 Period 3 CAP to SMOC Board for review and approval, submit to EOHLC.</p> <p>Develop and submit FY26 Period 1 CAP to SMOC Board for approval, submit to EOHLC.</p>	Planning & Compliance Staff; Division Directors; Program Directors & Managers
April/May 2026	Prepare and present FY26 Period 2 CAP to SMOC Board	Planning & Compliance Staff; Division Directors; Program Directors & Managers
October 2026	<p>Prepare and present FY26 Period 3 CAP to SMOC Board for review and approval, submit to EOHLC.</p> <p>Develop and submit FY27 Period 1 CAP to SMOC Board for approval, submit to EOHLC.</p>	Planning & Compliance Staff; Division Directors; Program Directors & Managers