



Oak Hill

Community Development Corporation

Organizational Update Progress Report of 2011

Submitted to NeighborWorks® America

Introduction

Oak Hill CDC's FY 2011 was highly successful. This document provides an overview of the last fiscal year by comparing outcomes to the goals set forth, reviewing challenges, changes in capacity, strategies Oak Hill used, marketing and visibility events, assistance from NeighborWorks® America and looks forward by reviewing the planning process for the 2012 FY Organizational Underwriting.

Oak Hill spent the year supporting our mission which reads "Oak Hill CDC creates opportunities to connect with resources, fosters leadership, and supports community members in their efforts to enhance and revitalize their neighborhoods."

Last year, FY 2011 was the first year of Oak Hill CDC's Three Year Strategic Plan, and as we enter into year two the agency continues working to improve the community we serve. Oak Hill CDC continues to make progress on our agency's Community Level Outcome: The Core neighborhood will be a desirable place to live, work and play.

In FY2011, Oak Hill CDC Completed a Community Needs assessment with surveys for residents, tenants, Board of Directors, community partners and youth. This data, paired with Census and all known community data helped us determine the baseline for measuring our CLO in the coming years.

This progress report will first complete an overview of Challenges, Adaptive Strategies and Changes in Capacity that relate to the overall organizational 3 year Strategic Priorities outlined in our 2010-2013 Strategic plan and our agency CLO.

**Organizational Overview of
Three Year Strategic Priorities
Challenges, Adaptive Strategies and Changes in Capacity**

Organizational Strategic Priority: Community Stabilization and Sustainability

Adaptive Changes at the NeighborWorks® HomeOwnership Center of Worcester

A decrease in federal funding to the City of Worcester has given the Center an opportunity to reformat and create a stronger structure for the partnership model that supports the work of the NeighborWorks® HomeOwnership Center of Worcester. With funding cuts of partner agencies, the Center is reformatting the existing partnership structure to create specialized partnerships with expert agencies to strengthen the system to be able to continue to provide full cycle housing counseling services, through stronger more specialized partnerships.

Oak Hill CDC now has autonomy over programming, funding and staffing decisions at the NeighborWorks® HomeOwnership Center of Worcester. This change is also key as we move forward with the NeighborWorks® America DBA process, allowing us to ensure Oak Hill CDC is able to be the best possible agent for the NeighborWorks® America Brand.

Through this evolving partnership, Oak Hill CDC will continue to sustain all the quality services to our residents we are known for, with the NeighborWorks® HomeOwnership Center of Worcester being a quality one-stop housing education center the Greater Worcester community.

Adaptive Changes in response to “High Foreclosure Incidents” in our community

As foreclosures in our Community continue to rise, Oak Hill CDC has changed its Real Estate Development agenda from new construction to rehabilitation of foreclosure properties. This year we became a member of the City of Worcester and CHAPA’s First Look Receivership program, giving us first access to all foreclosed properties in our community. We also joined the Affordable Home Initiative through the Attorney General’s Office. Oak Hill CDC purchased two foreclosed properties through the NSCT and rehabilitated these into affordable rental units with stimulus housing and energy funds.

We continue to provide Foreclosure housing counseling at our Homeownership Center. This year we were awarded funding through the Emergency Homeowner Loan Program and served as an application and processing center for the program.

Organizational Strategic Priority: Community Engagement

Adapting the way we Engage Community Members to engage more residents

Oak Hill CDC made an adaptive change in reformatting our Community Engagement programming this year by partnering with the Worcester Public Schools and in our core investment area with Union Hill Elementary School. The school serves as a mechanism for Oak Hill CDC to reach every family in our community because all children in our core neighborhood attend this school for pre-k through 6th grade. The school has partnered with Oak Hill DCDC to effectively provide increased resources, advocacy and community outreach to every parent, family and child living in our core community.

Union Hill Elementary School reached out to Oak Hill CDC to support and coordinate community involvement in their schools Turnaround Plan. The partnership with Union Hill Elementary School and Worcester Public Schools has strengthened Oak Hill CDC's community outreach and Leadership. Oak Hill CDC was asked to serve on a commission to coordinate community partners for the entire school district and serve on Union Hill School's Governing Council.

Organizational Strategic Priority: Increasing Awareness of our Brand

Marketing Outreach

Oak Hill CDC completed two full court public relations campaigns this fiscal year. The first was to effectively market the services at The NeighborWorks® HomeOwnership Center of Worcester and it highlighted the leveraging effect of NeighborWorks® investments, materials, ratings and the services provided at the Center. This campaign was completed to market underserved communities and populations ads as well as advocate for continued funding at the Center. Both, Oak Hill CDC and NeighborWorks® HomeOwnership Center of Worcester created new websites with easily accessible up to date information information about programming.

The second full court public relations campaign was completed when the agency with the Congressman's endorsement received funding through the Emergency HomeOwner Loan Program. This public relations campaign was completed at a county-wide effort through PSA's, TV, Print Ads and online. The Campaign not only highlighted the EHLPP program, but all services offered at the NW HOCW.

Organizational Strategic Priority: Expansion to Underserved People and Communities

Reaching Underserved People and Communities

Oak Hill CDC has proven time and time again its ability to innovate in the ways it reaches underserved people and communities. We effectively market through faith based connections, cultural newspapers and radio stations.

Although Oak Hill CDC has received 6 best practices in marketing to Underserved People and Communities from NeighborWorks America we felt it was also necessary to continue our comprehensive holistic efforts to ensure outreach to the full community.

Oak Hill CDC completed a major step in understanding how to reach underserved people and communities. During our Community Needs assessment community members were asked where they received information about events and programming. The results reaffirmed many of our marketing practices, but also showed us that we needed to do more direct outreach to members of the community. Many residents identified the schools their children went to and local businesses as methods of finding out about programming and events. Oak Hill CDC has partnered with Union Hill Elementary School giving us a mechanism to reach all of the families in our community.

Organizational Strategic Priority: Organizational Financial Sustainability

Investments: Creating Line of Business Budgeting

Oak Hill CDC has created Line of Business budgeting which show investments aligning with the agency's Strategic Plan, Line of Business Plans, Operating Plan and Work Plans. In changing economic times it has become critical that Oak Hill CDC is able to provide highly detailed and comprehensive financial assessments of each line of business to our Board of Directors, funders, and community.

Oak Hill CDC has created Line of Business (LOB) Budgeting for each segment of our programming which allows staff, board members and residents to understand how funding the agency has received is turned into production, paired with ongoing program evaluations which inform programming adaptations which show us exactly how Oak Hill CDC is investing our funding.

The Majority of our Board of Directors are low income residents of our community, and the Board of Directors determines all financial decisions and investments in our community. With the change in accounting practice all managers and Board Members received training to understand LOB budgeting to make informed decisions about programming.

Resource Development Agenda

To provide a more sustainable financial future, Oak Hill CDC continues to diversify funding. The first step of this process was to hire a Director of Resource Development who has created a comprehensive Resource Development Agenda and plan to diversify funding across each Line of Businesses with new funding including an Annual Appeal, government funding, individuals, venture income, special events corporate funders and foundations.

Administrative: Challenges, Adaptive Strategies and Changes in Capacity

- i LOB budgeting created
- i Reporting Improved: CMax Conversion from NStep
- i All Historical Production reported to NeighborWorks® America
- i Reviewed all employee benefits
- i Changed to production based employee evaluation
- i Changed medical plan: selected new carrier
- i Instituted a PTO policy moving from vacation and sick time
- i Instituted a flex schedule at the HOCW
- i New Website: Used website to sign people up for orientations and programming
- i Used our website to translate into 40 languages
- i Installed New Servers
- i No deficiency Financial Audit
- i No Deficiency rental property audit
- i No Deficiency audits in Accounting, Rental Portfolio, NFMC, AG, DHCD and the City of Worcester

**Progress Reports
Line of Businesses**

NeighborWorks® HomeOwnership Center of Worcester

Strategic Priority Issues:

- ❖ Community Stabilization and Sustainability
- ❖ Expansion to underserved people and communities
- ❖ Increasing awareness of our Brand
- ❖ Organizational Financial Sustainability

**Challenges, Adaptive Strategies and Changes in Capacity
NeighborWorks® HomeOwnership Center of Worcester**

Hard economic times, and decrease in federal funding to the City of Worcester lead to the NW HOCW's loss of Community Development Block Grant funding for housing counseling, with this loss there was a need to reformat the existing partnership which required partners to have staff from their agency located at the NW HOCW. The City of Worcester commended the NW HOCW for its efforts in the community, and wrote in their HUD Community Development Block Grant Housing plan they will be relying on the NeighborWorks® HomeOwnership Center of Worcester to continue to provide full-cycle housing counseling services with this funding reality. Worcester East Side CDC has decided to exit the HOCW partnership.

With these structural changes in the NW HOCW, the center is still able to offer full cycle housing counseling, and there have been no staff layoffs at the HomeOwnership Center of Oak Hill CDC staff. (Other partner agencies at the NW HOCW lost funding for each staff member located at the HOCW, which was indicated as an in kind contribution in the budget of the HomeOwnership Center.) This adaptive change strengthens Oak Hill's autonomy and ability to continue high levels of production and one stop full cycle housing counseling and services.

The partnership was formerly based on having partner agency staff located at the HomeOwnership Center. This has become an opportunity for Oak Hill CDC to improve the governance and functioning of The Center. All HOCW staff are now employed a single agency, Oak Hill CDC and are governed by one set of personnel policies and we now have total budget control. All previous funding presently \$560,000 of HOCW remains intact (with exception of CDBG- Housing Counseling).

We are now moving to specialized MOU's to clearly define partnerships and reporting guidelines to all partners, for example:

- i Worcester Community Housing Resources is moving from a General Partner to a Lending Specific Partner with a Loan Servicing Agreement, and a new lending specific inter-agency MOU.
- i New Partnerships to include NHS of South Shore, through the Attorney General's office with Morgan Stanley settlement funds, which provides one full time Foreclosure Specialist located at the center.

Other Highlights:

- i We have been approved by Federal Housing Intermediary SeedCo as a sub grantee (former partnership was specific to WESCDC's housing counseling activities conducted at NW HOCW).
- i Completed Counselor Max Conversion with NeighborWorks(R) America TA support and Peer to Peer support from Lawrence Community Works
- i All historical data is now incorporated into the system and counted.
- i New Server purchased, and operational TA provided by NWA.
- i We transitioned the leadership and implemented a new management structure into the center and created a new Deputy Director position.
- i Peer Technical Assistance provided by Lawrence Community Works.
- i Received funding through the Emergency Homeowner Loan Program
- i Hired a new Resource Development staff member to manage funding, contracts, grants, marketing, outreach and communications.
- i No Deficiency audits in all rounds of NFMC Funding
- i Negotiated a three year lease at the NW HOCW.
- i Strategic use of VISTA Volunteers, Work Study students and Student Interns increasing capacity of the NW HOCW.

Monthly Housing Cost and Affordability

Objective	Progress	Outcome Notes
400 People will stay in their homes as a result of participation in programs	Exceeded	600 client families receiving foreclosure counseling stayed in their homes
320 people will buy homes after participated in homebuyer education	Exceeded	Highest Conversion rate to FTHB in all metro areas of the nation as rated by NW® America.

Quality of Housing

Objective	Progress	Outcome Notes
Clear 90 units of lead hazards	Exceeded	Expended \$1 million dollars in lead abatement funds- 165 units
Provide 50 activities associated with community outreach and education	Exceeded	Received 6 national best practices for marketing outreach efforts by NW® America
Train 100 households	Exceeded	Provided Rehab and Lead abatement training to 165 households

Environmentally Sustainable Design and Construction

Objective	Progress	Outcome Notes
Use of green building principles and materials in development projects	Met	Redevelopment of foreclosed properties into affordable housing units: 65 Providence St- Donation of Free Watt heating & hot water system saving significant utility expenses New washers/dryer to reduce energy expenses

Org. Capacity for Developing Community Leaders

Objective	Progress	Outcome Notes
Provide professional development certification	Met	All RED staff are now certified in RRP and Lead Safe Practices

Constructive Working Relationships Among Individual/Organizations in Community Building

Objective	Progress	Outcome Notes
Develop and implement Community Partners Survey	Completed	Partner Survey was completed by many high level community leaders who reported our agency as an important community program, and identified that Oak Hill CDC is perceived as "the voice" of neighborhood residents

Collaboration Promoting Shared Values

Objective	Progress	Outcome Notes
Development of HOCW Committee	Completed	Board Representatives from Partner Agencies Secured Committee meets quarterly

Community Engagement

Priority issues:

- ❖ **Community Engagement**
- ❖ **Community Stabilization and Sustainability**
- ❖ **Increase awareness of our Brand**

Challenges, Adaptive Strategies and Changes in Capacity Community Engagement

In June of 2010, Union Hill Elementary School was determined by The Commonwealth of Massachusetts to be a Level IV- Underperforming school. Every child living in Oak Hill CDC's core neighborhood attends this school during their elementary school years. Oak Hill CDC was asked by the school to coordinate community involvement during the creation of the school's Turnaround Plan. To support the school's Turnaround Plan and reach new members of our community. Oak Hill CDC moved our marketing/outreach strategy from Neighborhood Circles to school place-based methodology forming a partnership with Union Hill Elementary School which directly connects us with all of the students and parents from our core neighborhood.

Oak Hill CDC has had significant impact in engaging community residents in neighborhood engagement, and civic participation due to increased involvement in Union Hill Elementary School.

While working with the school we became an official Partner with Worcester Public Schools with MOU to gain access to students, families, school personal and facilities. The agency has been invited to serve as a leader on the Governing Council for Union Hill School. Worcester Public Schools also choose Oak Hill CDC to lead city-wide collaborating partnership efforts to integrate community organizations and resources into academic achievement.

Other Highlights:

- i Oak Hill CDC has seen an increase in crime in the community in green space/park space during youth activities such as Little League. In response, Oak Hill CDC had a Mayor's walk, three crime summits, advocated for youth programming, employment, and after school activities. We have worked to increased resources for public parks in our service area. Oak Hill CDC then worked with Worcester Academy to install cameras to increase security in the neighborhood and has been successful in lobbying, through a network of youth programming, the city of Worcester to continue funding Community Impact Policing in this community (only).
- i Grafton Hill Business Association successfully lobbied CSX expansion effort resulting in a \$5 million dollar fund to improve parks and \$200K of funding yearly to support neighborhood youth recreation.
- i Worcester Academy created a new lighted turf field to be used by neighborhood residents and youth after school and on the weekends.
- i With leadership from Oak Hill CDC, Vernon Hill School received a new playground and \$5 million dollar renovation for Vernon Hill Park

Develop and engage community leaders

Objective	Progress	Outcome Notes
Engage 15 new residents and 15 current residents	Exceeded	75 Community residents involved in programming
Engage 10 of new teens and 10 of current teens	Exceeded	Engaged 25 teens total
30 residents and youth complete NW resident leadership training	Met	Leadership training was completed in May
10 residents trained to facilitate NeighborCircles	Strategically Changed	Oak Hill CDC moved from holding NeighborCircles to being involved with the Parent Teacher Organization at Union Hill Elementary, through this we engaged 12 parents leaders
4 residents (2 adults and 2 youth) to attend CLI and NTI	Exceeded	After attending, received grant from CLI
Create Community Engagement Leadership Cmtee and Youth Council	Exceeded	Hope Coalition Union Hill Elementary School Partnership
Develop tool to recruit volunteers based on interest and skill level	Exceeded	Extensive Data Collection and measurement activities to establish baseline data and functioning for school and core

Identify and address community issues

Objective	Progress	Outcome Notes
40 residents, youth, business owners, etc. attending crime watches and Community Engagement Committee meetings (on average per meeting)	Exceeded	Identified problems as: crime increasing and foreclosure-problem properties. Met average goal, and one crime watch meeting during NeighborWorks® week was attended by 150 community members. Held series of crime watch meetings with attendance by police and city department heads Worcester Academy Camera and improved Community Policing
Organize three neighborhood improvement projects (e.g., cleanups, landscaping, etc.)	Exceeded	Organized volunteer groups for earth day cleanups, community garden, neighborhood clean ups and Banis Park Cleanups.

Expand relationships and collaborations among residents, youth, businesses, schools, nonprofits, etc.

Objective	Progress	Outcome Notes
Three NeighborCircles completed with 20-45 participants	Strategically Changed	Held 6 Union Hill Elementary School PTO meetings with 50 participants at each- connected with 340 students.
20 residents and youth become active in community garden	Exceeded	Additional 6 youth hired to maintain garden
15 residents and youth plan block party attended by 150 people	Exceeded	20 community members planned the block party which was attended by 175 people
10 residents, youth, and staff attend neighborhood events at Girls, Inc., Friendly House, etc. (on average per event)	Exceeded	Events attended: Canal Fest, Earth Day, Neighborhood Clean Ups, Hope Coalition, Boy's and Girls Club, Girls Inc and Union Hill Elementary School
Engage tenants through formation of tenant association or similar group, meeting once a month to discuss bldg and neighborhood issues	Exceeded	Invited to attend Crime Watch and Community Engagement meeting with private Tenant only meeting at the end to discuss tenant issues.
Offer AVID afterschool tutoring to 25 youth using 6 college volunteers	Exceeded	Awarded Grant through Women's Initiative for United Way
Support formation of parent group at Union Hill School and continue to support partnership	Exceeded	Oak Hill Formed PTO group at Union Hill Elementary and was invited to participate on Governing Council for School

Promote business district and participation of businesses in community

Objective	Progress	Outcome Notes
20 residents and youth volunteering at Canal Fest	Exceeded	30 residents and youth volunteered
5 residents who attend and/or become members of Grafton Hill Business Association	Exceeded	More members, and a higher rate of participation, assisted GHBA mobilizing to impact CSX Expansion and donations of 5 million dollars to improve community and \$200k a year
5 new sponsors 10 donations (depending on event)	Met	GHBA, Canal District Alliance, Polar, KaBOOM!, Dr.Pepper Snapple, Worcester Academy
10 new partnerships	Exceeded	Envices, Canal District Alliance

5 Board members attending and supporting CE events (on average depending on event)	Exceeded	Board Members Engaged

Encourage civic engagement

Objective	Progress	Outcome Notes
12 residents join a Board (Oak Hill CDC or other)	Met	Ex: Grafton Hill Business, Canal District
3 residents serve on a city commission	Met	President serves on City Commission
# of residents vote in November 2010 election	Increased	Formed partnership with Initiative for Engaged Citizens
Complete two voter registration outreach events (through IEC or other group) with teens and residents	Exceeded	IEC held candidates forum and completed outreach at school PTO meetings, events and community engagement meetings GHBA held district Candidates Debate

ASSET MANAGEMENT

CLO Indicators Selected:

- ❖ Quality of Housing
- ❖ Duration of Residency and Resident Stability
- ❖ Resident Satisfaction with Neighborhood

Challenges, Adaptive Strategies and Changes in Capacity Asset Management

Oak Hill CDC has completed 4 year upgrade of all rental units including \$400,000 of renovations and received a non deficiency finding in HOME review. Indicators we have improved our units include lower vacancy rates and lower maintenance expenses.

To follow up on improvements made to units, Oak Hill Property Tenants were interviewed as part of our Community Needs Assessment to find out other improvements we can make on our rental portfolio. With feedback from our tenants we increased all security in units

- i Researched and implemented a donated free watt system to save energy water and sewer, electricity and heat and hot water in one of our buildings-three units
- i Installed new laundry with funding from a new grant from the United Way, and we are in the processes of evaluating energy savings vs. capital expenditures for 6 units.

To continue improving our rental units and become more energy efficient Oak Hill CDC is in process of a Capital Needs Assessment that includes energy efficiently evaluation and green practices.

Quality of Housing

Objective	Progress	Outcome Notes
Poll tenants regarding physical improvements; implement a plan	Met	Facilitated Surveys Completed, and improvements have began
Prepare HQS Inspection worksheet	Met	Instituted organizational pre audit for housing units before Inspection Passed Annual HQS
Research costs for, issue RFP and complete Capital Needs Assessment	Strategically Changed	Audit Have brought in-house to save expense and will be completed in FY 12
Conduct HQS Inspection on all UHRI properties	Met	Passed Annual HQS- no deficiency audit
Research Pricing on Laundry Equipment & secure grant to purchase equipment	Met	Received grant and installed new laundry equipment which has resulted in savings on water & sewer bill and Energy costs

Duration of residency and resident stability

Objective	Progress	Outcome Notes
Implement Tenant Satisfaction Survey (as part of residents survey with Community Engagement)	Met	Facilitated Survey Conducted, Results informed Organizational Underwriting and Work Plan Length of tenancy increased and vacancy rates are down

Strategic Priority Issues:

- ❖ Community Stabilization and Sustainability
- ❖ Organizational Financial Sustainability

Challenges, Adaptive Strategies and Changes in Capacity Real Estate Development

Our Real Estate Development Line of Business strategy has adapted to support the increased number of foreclosed properties in our community. Oak Hill CDC now has a renewed focus on turning formerly foreclosure properties into affordable housing units. To increase our ability to do this, we have become a member of State Wide CHAHA Foreclosure Initiative First Look through the National Community Stabilization Trust. We are also a member of the Attorney General's/City of Worcester Affordable Homes Initiative and are a Receiver for the City Worcester to rehabilitate foreclosure properties.

- i Increased available program supports: MHIC, NSP2, Worcester Academy Fund, Worcester Community Housing Resources Funding, Attorney General Affordable Housing Initiative, CHAPA: Foreclosure Initiative, OHCDC equity, NeighborWorks® America
 - o Increase of \$20,000 in CDBG affordable housing real estate development funding.
- i Dodd Frank Financial Services Bill establishes National Housing Trust Fund.
- i Massachusetts changes governance of Community Development Field and the bill authorizes funding of state Affordable Housing Trust Fund.

Stabilize Home Ownership

Objective	Progress	Outcome Notes
Engage 15 new residents in HomeOwnership Promotion or Preservation at the HOCW	Exceeded	Lead abatement Revolving loan funding Rehab oversight provided

Develop and Stabilize Affordable Rental Opportunities

Objective	Progress	Outcome Notes
Membership in NCST First Look Program	Met	Active Participant: Purchased 2 NCST Properties
Participation in Receivership Program	Met	Authorized receiver City of Worcester, Commonwealth of Mass Housing Court, Attorney General
Criteria to access these program offerings	Met	Selection Criteria Established
Expand rental portfolio by 6 units	In Process	3 units added to Rental Unit, two units in process
Develop vacant reuse strategy for 5 lots	Met	Researching Funding Options
Certify 1 key staff person and ensure capacity of rehab workers	Exceeded	All key staff in RED Certified in RRP and Safe Lead Practices
Develop Real Estate Cash Flow Model	Met	Proformas per property
Lead Master Plan Development	Met	Submitted to HUD

Promote Green Space Development

Objective	Progress	Outcome Notes
Gain Harrison Street (closed) bar site control	Met	NRSA funds committed to purchase, city to provide demolition
Establish baselines for Banis Park, Tot Lot, Vernon Hill, Mulcahy Field	Exceeded	CSX Donation, State Funding, City Funding Committed. Built new Vernon Hill playground.
Begin Green Space Development with City/Worcester Academy for Vernon Park and Crompton Park	Exceeded	Multi Million Dollar improvements to both parks complete

Promote business district and participation of businesses in community

Objective	Progress	Outcome Notes
Complete Grafton Street commercial streetscape	Exceeded	NRSA Storefront program, \$10 million dollar street scape committed by state of Mass

Community Stabilization via Education, Partnership & Advocacy

Objective	Progress	Outcome Notes
Use Survey results to inform and influence community stabilization	Exceeded	The Community survey showed residents were concerned about safety, street scape and green space.
Participate in NWA Achieving Excellence Program at Harvard	To be Determined	Will apply when program is again offered.
Work with Union Hill School partnerships to provide resources for community and school stabilization	Exceeded	Work with school to complete Wraparound Service Program Model, which Worcester Public Schools and Union Hill used to fund a new position at the school connecting the school programming to the needs of the whole family. Coordinated new library and art room for the school.

Board of Directors

Board of Directors provides agency oversight and governance to ensure the agency focuses on strategic priority areas. Our strategic focus and integration of CLO's starts at the board level (majority of whom are low income residents) Oak Hill CDC's strategic Plan for 2010-2013 outlined our five strategic priority areas:

1. Community Stabilization and Sustainability
2. Community Engagement
3. Increasing awareness of our Brand
4. Expansion to underserved people and communities
5. Organizational Financial Sustainability

Challenges, Adaptive Strategies and Changes in Capacity Board of Directors

Annually, Executive Committee Members meet to discuss evaluate the Board Level. Improvements identified were the need for more resident Board Members, easy access to organization, governance and materials and additional board trainings.

To determine what trainings Board Members would be best, members of the Board of Directors Completed an online survey (which will be done annually). The results from the survey were used to develop a Board Training Agenda. In addition to annual training, a segment of each Board meeting is dedicated to training and evaluation, Board members completed short trainings on Roles & Responsibilities, Board Member Expectations, Governance Training, Finance Training, Solicitation Training, Resource Development Training, Branding training, CLO Training and the Value of NeighborWorks® America Trainings. New board members will annually complete the Training and all training documents can be found on the newly created password protected Board Member section of Oak Hill CDC's website.

The website has also allowed Board Members access to all Board Meeting documents before the meeting to review for discussion and decrease the time needed to review documents during the board meetings. This also makes time for meeting evaluation, which is now completed at each board meeting, allowing the board to constantly improve their oversight of the agency.

To build capacity of the OHCDC Board of Directors

Objective	Progress	Outcome Notes
Assessment of board member capacities, participation & intention	Exceeded	Annual Board Member Intention Form Executive Board members met to discuss board member capacities, participation and intention Board Member Training Survey conducted results determined Annual Board Development Training Agenda
Identifying possible new board members	Exceeded	Added more low income residents to board
Assessment of board leadership	Met	Nominating Committee
Review of Succession Plan	Exceeded	Reviewed and re worked parts of the Succession Plan

All board members will understand their roles, responsibilities, and other information pertinent to their membership

Objective	Progress	Outcome Notes
Hold successful board training including Roles & Responsibilities, Board Member Expectations, Governance Training, Finance Training, Resource Development Solicitation, Branding training, Value of NeighborWorks® America and Community Level outcome training	Exceeded	All trainings completed and available for review online for Board Members
Evaluation of training Modules	Exceeded	Evaluated each training segment
2 board members attend Board Source Training via NeighborWorks® America	Exceeded	President and Treasure participated and reported back to full board
Board member website with all documents created	Met	Website formed, and members received training. Website contains Strategic Plan, Board Agendas, Minutes, Operating plan and LOB Work Plans & budget
Complete annual Evaluation of Executive Director	Met	Review Completed, Annual E.D Goals Determined

Board will identify and plan for challenges, celebrate strengths.

Objective	Progress	Outcome Notes
Conduct a formal board evaluation by web-based survey	Met	All members completed online survey and identified training needs
Evaluate every board meeting	Met	At each meeting
Ensure committees meet regularly and provide minutes to board for the review	Exceeded	NeighborWorks® 3-year Review, High Marks for Board Development engagement and understanding Annual Board and Staff Celebration held in conjunction with Annual Board meeting

Resource Development and Marketing & Communications

Challenges, Adaptive Strategies and Changes in Capacity Resource Development

During FY 2011 a Director of Resource Development and Marketing was hired. In the last year this person has been fully trained and is now up to speed. This position now allows us the internal capacity to write and manage our annual Organizational Underwriting Plan. The position has brought strong grant writing and communication skills and was utilized for projects such as DBA, Success Measures, NW Week, Legislate Advocate Meeting. In addition to increasing our capacity for fundraising, the position has integrated the Resource Development agendas for Oak Hill CDC and the NW HOCW. It also gives the agency ability to create and print all of our marketing materials in house. With the hiring of this new position, the Executive Director is able to focus more effort on External Markets, Partnerships and finding new resources.

To increase philanthropic support and diversify funding

Objective	Progress	Outcome Notes
Increase Stewardship Opportunities	Met	New Grants, United Way Submission
Increase Special Events	Met	
Increase Grant funding	Met	New grants secured, increases in existing grants

To define who we are to the community and educate the community about the value of our agency

Objective	Progress	Outcome Notes
Create new marketing materials	Exceeded	Clients served in new geographic areas and underserved cultures reached
Maintain and increase presence at Worcester Community Events	Exceeded	Ongoing community recognition of our agency mission and the role of NeighborWorks® America
Strengthen online/internet presence	Exceeded	New websites, translation now available and accessible
Complete Community Partners Survey	Met	Feedback used to guide operating plan and LOB work plans

NeighborWorks® Impact

In response to changing economic times the NeighborWorks® Homeownership Center of Worcester developed a full court public relations packet and media campaign using NeighborWorks Materials and NNA ratings. These compiled public relations materials and advocated for housing counseling resources which were disseminated to: City Council, Mayor, City Manager, DHCD, MHP, MACDC, Grantors, Foundations, State Delegation and National Delegation in Washington. These materials highlighted NeighborWorks® Investments, Professional Requirements of membership and the outcome measurements and production as verified by independent third party sources.

The NW HOCW was granted funding as a Regional Foreclosure Center in a "high incidents area" as determined by HUD we applied for and received funding from Emergency HomeOwner Loan Program with assistance from NeighborWorks® America. The NW HOCW took this as another opportunity to market the services offered at the center and completed a county-wide outreach agenda. Congressman James McGovern announced the award to The Center. Materials were disseminated to State, Local & Federal Delegation, City Manager, City Council, United Way and the Chamber of Commerce who then disseminated materials to families who may benefit from NW HOCW programming. Marketing of the EHELP Program and NW HOCW programming was again completed on the TV, Radio, Print Ads, Websites and Direct Mailings.

Both of these marketing opportunities reaffirmed we were the NW HOCW Regional HUB for full cycle housing resources, education and events.

Other Highlights:

- i Used facilities at HOCW to offer extensive training facilities throughout real estate development field.
- i Branding DBA Determination
- i Training Slots-
 - o The organization used all of its training slots, utilized additional training slots from NE Division, received scholarships for partner employees to attending NeighborWorks® trainings and purchased additional training slots at our own expense to be sure that we met our training objectives in certification and knowledge.
- i Placed based training on city wide DeveloperPro software
- i Peer to Peer training at HOCW from Lawrence Community Works: Counselor Mac and Production
- i DBA Marketing workshop from NE Division
- i Scam Prevention workshop at HOCW presented by NE Division
- i Technical Assistance in lending WCHR with support from Eric Hanger

DBA Update

Board and senior management made the decision to postpone the DBA process pending the right opportunity to launch. Too many variables in local housing market, state housing market and with federal government resources that could negatively impact the DBA process. We are looking for the right market conditions to be proactive and not reactive, making decision not based on crisis.

Marketing and Visibility Events

Leveraging the NeighborWorks® America (logo) brand

Direct Mailings, Television Ads, Radio Ads, Print Ads, Events, and promotion through Chamber of Commerce, United Way and Worcester Public Schools to complete outreach to underserved/minority communities including- African American Community, Latino Community, Asian Community Center, South Worcester County, City of Worcester and 01604 service area 25,000 recipients- with efforts *to promote:*

- i Housing Promotion
- i Housing Preservation
- i Lending
- i Rehabilitation
 - i Lead Abatement
- i Foreclosure Prevention
- i Scam Prevention
- i EHLP

NeighborWorks® Week

- i Crime Watch Summit with 150 Community Members attending
- i Park Clean Ups: Banis Park, Vernon Hill Park, Mulcahey Field

Foreclosure Prevention

- i Mortgage Service Workshop □ 250 attendees, 20 national mortgage servicers
- i Foreclosure Materials
 - o Mailings
 - o TV, Radio and Print Ads
- i Carpenter's Union
- i EHLP received full court press by Congressman at HOCW

Anti Scam

- i Home Show Convention
- i Radio
- i Television
- i Canal Fest: 15,000 attendees

New Website

- i OHCDC
- i HOCW

Buy Worcester Now: Model program to increase Home Ownership Real Estate Sales

- i \$95 million in mortgage products to refinance area homeowners out of predatory loans, save from foreclosure, finance low-moderate income first time homebuyers
- i Added to both Oak Hill and NW HCOW Websites
- i Program materials

National Neighbor Works® Association Member- Advocating

- i NNA National Lobby Day: Executive Director attending Lobby Day in Washington DC and Set up meeting with Scott Brown with all NW Directors in Mass. Other meetings held with Sen. Kerry, Congressman McGovern & Congressman Neal

Latino Leaders Convention

Community Leadership Institute

i 10 participants from Board and Community Engagement

Worcester Academy: Leveraged NW Real Estate Loan Fund 50%

i Revolving Loan Fund \$300,000

Colleges- Service Learning Internships

i Worcester State University

i Clark University

i Assumption

i Quinsigamond Community College

i College of the Holy Cross

i Univ. of Mass.

i WPI

Planning Process for FY 2012 Operating Plan

Oak Hill Community Development Corporation is now entering its 2nd year of its Three Year Strategic Plan. We began planning for our FY 2012 operating plan during the creating of our Strategic Plan.

The Oak Hill CDC planning process has been dynamic and comprehensive, involving the Board of Directors and staff of the agency as well as individual and group meetings with residents and businesses in the neighborhoods served by Oak Hill CDC. The plan presented here represents the culmination of this entire effort.

This year we completed a Community Survey of Residents, partner agencies and businesses in our community. The results from the survey reaffirmed our Strategic Priority Areas set forth in our three year strategic plan. The agency then had a meeting of all Line of Business Managers to review the work completed in FY 2011 and make any changes to plans for the coming fiscal year.

The agency vetted ideas for FY 2012 Operating Plan through its Board of Directors, Funders, Residents, Community leaders, Businesses, NeighborWorks® America, volunteers, and partner agencies. With input from all parties and drawing upon plans set forth in our Three Year Strategic Plan, Oak Hill CDC created its FY 2012 Operating Plan.

PLANNING PROCESS OVERVIEW

