

Oak Hill Community Development Corporation Strategic Plan 2011-2013

Introduction

Oak Hill Community Development Corporation's strategy is mission-centered, based on existing strengths and resources, and rooted in the current and emerging needs of the communities served. This strategic plan aims to strengthen Oak Hill financially and organizationally; to build on and enrich current programming; and to establish systems and procedures supportive of increased program effectiveness and ensure long-term community impact.

We have become recognized as a leader in the Worcester community and beyond and, as such, understand the associated responsibility and expectations for ensuring ongoing effectiveness in our affordable housing and community revitalization efforts. The external environment has been quickly changing, providing the backdrop for us to examine our programs and their consistency in meeting current and emerging neighborhood and area needs. Targeted strategies and dedication to ongoing evaluation activities will ensure that we remain an organization committed to community development and well-being.

Over the last seven months, we have been involved in multiple planned activities to engage various stakeholder groups in the process of assessing our current organization and constituent needs, examining external factors impacting our work, and developing a renewed understanding of priority issues around which our organization can focus our efforts and activities to actualize our mission. This inclusive process was designed to ensure that there is a sense of understanding and ownership across stakeholders, which will provide the context for successful plan implementation and dedication to honest and ongoing evaluation.

Organization Name - New

Various stakeholders of the organization have been engaged in the process of changing the name of the organization to better reflect the expanded services and service area impacted by the organization. The name, "Oak Hill Community Development Corporation", limits the perceived impact area geographically and lacks the brand recognition of NeighborWorks® - a national leader in community revitalization and engagement efforts. We are pursuing all necessary avenues to change our name to:

"NeighborWorks® Greater Worcester"

Organizational Mission - New

"Oak Hill CDC creates opportunities to connect with resources, fosters leadership and supports community members in their efforts to enhance and revitalize their neighborhoods."

We accomplish our mission through the following **Impact Areas**:

- i Real Estate Development: New construction, rental properties, and the redevelopment of foreclosed, abandoned and blighted properties
- i Housing: Promotion, Preservation, Lending, and Rehabilitation
- i Community Engagement
- i Economic Development

Strategic Goals

As a result of examining the mission, completing the SWOT analysis, identifying the mandates, and reviewing community data and perception, five priority issue areas emerged as the focus of Oak Hill CDCs Strategic Plan.

- 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**

1) **Community Stabilization and Sustainability**

Rationale: Given the current foreclosure rates and economic crisis, how can Oak Hill CDC use its resources and community connections to minimize the negative impact of declining economic investment, and play a leadership role in stabilizing and sustaining our community going forward? Unprecedented housing market volatility (with alarming foreclosure and unemployment rates for our community) has made us shift from our traditional model of real estate development which had focused on new construction real estate development, to rehabilitation of foreclosed/abandoned/blighted properties into affordable workforce housing. There is no need to produce additional housing units for sale when so many existing units sit vacant or in disrepair. To ensure long term sustainability, rehabbed units will be made available as first time homebuyer's properties or as rental units to be held in the Oak Hill CDC rental portfolio.

Objectives:

- x Develop strategies focusing on **the preservation and expansion of homeownership.**
- x Create a range of **safe, quality and affordable housing opportunities** through the rehabilitation of distressed foreclosed and /or abandoned properties and the provision of rental housing.
- x Operationalize a comprehensive lending program – **increasing residents housing and financial stability.**

Intended Impacts:

- x Increase existing portfolio by **adding nine rental units** to our total of 111 units.
- x **400 people facing foreclosure per year will stay in their homes** by participating in foreclosure counseling.
- x **Improve housing conditions** for homeowners within our area through **lead abatement in 90 Units per year.**
- x **Expand reach of First Time Homebuyers Classes to communities not served,** by adding one location per year for the next three years
- x After participating in homebuyer education, **320 local residents each year will buy homes.**
- x By structuring a comprehensive lending program, **delinquency rate will be 50% below market trends.**

2) Community Engagement

Rationale: Oak Hill CDC is committed to maximizing the significant existing human resources to increase impact of the agency's programs and to foster community 'ownership'. Oak Hill CDC plays a central role in community organizing and providing services which help to empower community residents to make positive changes.

Goal: To engage neighborhood residents as change agents for their own communities.

Objectives:

- x Participate in **NeighborWorks ® Leadership training.**
- x Continue to **sustain a majority resident representation** on the Board of Directors.
- x **Develop formalized volunteer recruitment program** through the formation of a Community Engagement Leadership Committee and a Youth Council.

Intended Impact:

- x There will be a **network of individuals with the skills and knowledge to impact their community.**
- x More community members **will be engaged in community development and revitalization efforts.**

3) Increasing awareness of the our Brand

Rationale: Though extensive research we believe our residents and partners lack understanding of the depth and breadth of our work in the community and the positive impacts which they have helped to bring about.

Goal: To increase awareness of, participation in and support of Oak Hill CDC programs.

Objectives:

- x **Develop a comprehensive marketing plan** to increase awareness about its work, including the distribution of semi-annual newsletters.
- x Examine current and potential partnerships within the community to identify the role they could play in the attainment of **increasing awareness and participation in agency activities and programs.**
- x New residents will be **welcomed to the neighborhood** and immediately be made aware of Oak Hill CDC programs and services.
- x **Increase our community impact by serving more residents each year** through varied organizational programs and services.
- x **Involve service recipients** in an ongoing evaluation of program effectiveness and responsiveness.

Intended Impacts:

- x Community residents, local businesses and others **understand the mission and goals of the CDC.**
- x **Our clients have a voice** in the direction of our work.
- x **Expand positive name recognition** throughout the community and within multiple constituencies through increased marketing efforts.

4) Expansion to underserved people and communities

Rationale: In reviewing the increasing needs of our service area as well as the expanded impact of the Neighborworks® Homeownership Center programs, we will be embarking on a fact finding strategy to insure that our programs are targeted to those who need us most, where they need us most, and are consistent with our mission and overall Community Level Outcomes.

Goal: To define and expand our impact both geographically and in response to the needs of underserved populations through market segmentation focus.

Objectives:

- x To **expand work of the Homeownership Center** to undeserved areas and populations.
- x To provide ongoing **support and programs in the Canal District of Worcester.**

Intended Impacts:

- x New geographies and populations will experience **improvement in neighborhood stability.**
- x Elevation of the economic status of our residents and youth.
- x More households will benefit from Homeownership Center programs, **resulting in increased homeownership and decreased foreclosure rates.**

5) Organizational Financial Sustainability

Rationale: A concern was raised through the planning process of unrestricted, operational funding. This, in turn, limits the programming possibilities of the agency. Housing and economic development funding resources have changed dramatically. Traditional sources are overburden by demand, new opportunities require entire new programs to be developed and implemented.

Goal: To increase unrestricted revenue that can be used for discretionary programs implemented in response to emerging community needs.

Objectives:

- x **Implement the recently-developed, strategic fundraising plan**, which includes grant research and writing, the creations of a signature special event, donor identification, cultivation and recognition, and a annual appeal.
- x Review outsourcing of financial management and property management to **determine the cost-effectiveness** and possible alternatives.

- x Other avenues of increasing income and services will be explored further, such as the creation of **more rental units**
- x Targeted marketing activities are planned to **engage business partnership and corporate support.**

Intended Impacts:

- x **Programs consistent with our mission can be adapted or developed** in response to community needs as they arise.
- x The work of Oak Hill CDC continues to **positively impact the community served.**
- x **Oak Hill CDC remains a viable and vibrant community resource** for years to come.

Future Recommendations

Oak Hill CDC has developed a strategic plan which can help to guide the work of the agency in both the short-term (within the next year) and long-term (over the next few years). Through the hard work and involvement of staff, volunteers and Board members, it provides an assessment of the agency currently and identifies issues to be addressed. It is important that this plan be viewed as the first step in an ongoing process that will help to guide the agency's development and growth over the next few years.

1. Count all the historic agency production that has been completed.
2. Set in place a mechanism which enables Oak Hill CDC to have a proprietary investment in partnership production.
3. Join Success Measures
 - a. Determine the most effective multiyear community level outcome and operationalize data collection, production reporting, outcome measurement and systematic evaluation.
4. Complete vision and values statements.

Following are more specific recommendations regarding the various components of the strategic planning process, in the order they arose. These are only recommendations and suggestions for further development and application of the planning efforts already begun by Oak Hill CDC.

An in-depth analysis of the new 2010 Census information (once available) should occur – including focus on demographics of the neighborhoods as well as housing issues. These statistics are important to ensuring that existing programs and services are based on actual community needs and are planned in response to current situations and in anticipation of future trends.

In summation, Oak Hill CDC has completed a comprehensive long-term strategic plan, which will serve as a necessary tool for organizational growth and development. The development of this plan was driven by an engaged process, actively including many groups of stakeholders, resulting in ownership and leadership development as additional outcomes to the plan itself.

Concrete recommendations have been made and short-term tasks related to strategic issues identified. A new name and mission statement have been adopted. Oak Hill CDC has used this process to position itself for greater organizational health and stronger neighborhoods. This plan relies on continued reassessment and measurement to continue agency planning in order to ensure adaptive change and consequently, the success of Oak Hill CDC in its actualization of its identified mission.

**Oak Hill CDC
Strategic Plan 2010-2013**

Appendix

Implement this Strategic Plan

Asset Management Activities, Goals, and Timeline 2010 – 2013

Priority Issue:

1) Community Stabilization and Sustainability

Year 1 (July 2010 – June 2011):

- i Poll tenants on their wish list of desired physical improvements – September 2010
- i Review poll and make decisions on and implement a plan for improvements
- i Prepare HQS Inspection worksheet (November 2010)
- i Prepare Tenant Satisfaction Survey (to be included as part of residents survey being done by Community Engagement) (December 2010)
- i Research costs of completing Capital Needs Assessment (October 2010)
- i Conduct annual HQS Inspection on all UHRI properties (March–April 2011)
- i Research Pricing on Laundry Equipment
- i Apply for grant to purchase equipment
- i Request RFP's for Capital Needs Assessment (November 2010)
- i Complete Capital Needs Assessment (February 2011)
- i Post Rules in each building (March 2011)

Year 2 (July 2011 – June 2012):

- i Begin physical improvements from tenant poll (July 2011)
- i Complete second annual Surveys all tenants of Oak Hill CDC properties (UHRI & Upsala)
- i Monitor Vacancy Rates
- i Complete exit Survey of exiting tenants (as needed)

Year 3 (July 2012 – June 2013):

- i Continue physical improvements from tenant poll (July 2012)
 - i Complete second annual Surveys all tenants of Oak Hill CDC properties (UHRI & Upsala)
 - i Monitor Vacancy Rates
 - i Complete exit survey of exiting tenants (as needed)
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**Board Development
Activities, Goals, and Timeline 2010 – 2013**

Priority Issues:

- 2) Community Engagement**
- 4) Organizational Financial Sustainability**
- 3) Increasing awareness of our Brand**

Nominating Committee

- i Annual repopulation of committee with Board Chair serving as committee chair; Vice Chair will also be a member of this committee to support succession (June)
- i Annual goals to include:
 - o Assessment of board member participation by discussion and review of attendance and committee work (June)
 - o Assessment of board member intention by survey (June, July)
 - o Inquiry to committees about committee members 'ready' to become possible new board members (June, July)
 - o Assessment of board members capacities to define skills, connections and demographics needed (June)
 - Special emphasis will remain to sustain a majority resident board
 - o Review of Succession Plan; present for annual adoption vote by board (July)
 - o Assessment of board leadership, succession (June)
 - o Dialogue with potential new board members about expectations, role (August)
 - o Present new slate of board members & officers (September)

Board Capacity Building

- i Annual goals to include:
 - o Training:
 - Annual Board Orientation (October)
 - Annual Board Roles and Responsibilities Training
 - Annual Board Donation Solicitation Training (February)
 - Annual Marketing Training (May)
 - Two board members will participate in online education offered through NeighborWorks® America annually and will offer information presentations at board meetings to facilitate shared learning
 - o Evaluation:
 - Annual formal board evaluation by web-based survey; analysis of the data (May)
 - Informal board evaluation using Plus/Delta activity (quarterly)
 - o General:
 - Continue every other month board meetings with high emphasis on committee level work and participation; all members will actively participate on at least one committee
 - Create Member Section on website for password-protected document access to facilitate greater ease of information management, greater transparency and a more 'green' approach (2010)
 - Committee Development (October and ongoing monitoring by Executive Committee)

- i Ensure that all committees are populated and chaired by a board member and include community members as well; committee chairs will recruit committee members
 - i Ensure that all committees produce and distribute minutes
 - i HOCW Committee will move to engage members from each partner organization's board of directors (2010-2011)
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**Community Engagement
Activities, Goals, and Timeline 2010 – 2013**

Priority issues:

- 2) Community Engagement**
- 1) Community Stabilization and Sustainability**
- 3) Increase awareness of our Brand**

Year 1 (July 2010 – June 2011):

- i Resident Satisfaction Survey (residents, youth, tenants, businesses, etc.)
- i Community Partners Survey
- i Set up AVID tutoring program with volunteers recruited from colleges
- i Complete NW Resident Leadership Training (see curriculum)
- i Form “Community Engagement Leadership Committee” with set meeting structure, decision- making power, roles and responsibilities, recruitment, etc.
- i Form “Youth Council” with set meeting structure, decision- making power, roles and responsibilities, recruitment, etc.
- i International Gala (April 2011)
- i Cookbook with teens/residents and children’s book with Pam
- i Complete 3 NeighborCircles
- i Distribute 2 newsletters (Fall 2010 and Spring/Summer 2011) highlighting a teen, resident, and business owner
- i Run All Stars program for 100 youth through 9/30/10

Year 2 (July 2011 – June 2012):

- i Resident Satisfaction Survey (residents, youth, tenants, businesses, etc.)
- i Community Partners Survey
- i Complete 3 NeighborCircles
- i Distribute 2 newsletters (Fall 2011 and Spring/Summer 2012) highlighting a teen, resident, and business owner
- i Run All Stars program for 100 youth through 9/30/11

Year 3 (July 2012 – June 2013):

- i Resident Satisfaction Survey (residents, youth, tenants, businesses, etc.)
 - i Community Partners Survey
 - i Complete 3 NeighborCircles
 - i Distribute 2 newsletters (Fall 2012 and Spring/Summer 2013) highlighting a teen, resident, and business owner
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**NeighborWorks® HomeOwnership Center of Worcester
Activities, Goals, and Timeline 2010 – 2013**

Priority Issues:

- 1) Community Stabilization and Sustainability**
- 4) Expansion to underserved people and communities**
- 3) Increasing awareness of our Brand**
- 5) Organizational Financial Sustainability**

Corresponding Programs:

- i Housing promotion
- i Housing Preservation
- i Lending
- i Rehabilitation
 - o Lead Abatement

Year 1 (July 2010 – June 2011):

- i 800 people participating in foreclosure counseling via inquires and counseling- 50% of these people facing foreclosure will stay in their homes
- i 900 first time homebuyers will participate in homebuyer education- with 320 buying homes
- i Community Partners Survey
- i Expansion of First time HomeBuyers Classes into 1 surrounding community
- i 100% of Real Estate Staff will improve their professional development
- i Continue Cross training with City and Community Loan Fund on Lending
- i Operationalize comprehensive lending program including funding from NeighborWorks®, Worcester Academy, and Community Block Grant, Rehabilitation, Emergency and Revolving Loan monies resulting in a Delinquency rate of 50% below market trends
- i Participate in loan committee meetings
- i Work with other CDC's and banks to increase sales of properties
- i Continued work with Worcester State College
- i Exploration of Social Networking potential
- i Development of HOCW Committee
- i Work with the city to become the hub for Rehab and Lead programs in the city
- i Provide certified professional development for affordable housing practitioners and homebuilders
- i Lead Abatement
 - o Units of Cleared of Hazards-90
 - o Community Outreach and Education Goals- 50
 - o Training goals- 100

Year 2 (July 2011 – June 2012):

- i Become the city's and community loan funds "store front" for lending
- i 800 people participating in foreclosure counseling via inquires and counseling- 60% of these people facing foreclosure will stay in their homes
- i Work with the city manager to increase partnerships across the city
- i 950 first time homebuyers will practice in homebuyer education- with 340 buying homes

- i Community Partners Survey
- i Expansion of First time HomeBuyers Classes into 2 surrounding communities
- i 100% of Real estate staff will improve their professional development
- i Identify new down payment assistance programs to increase income-level assistance
- i Exploration of curriculum development for high school students
- i Transition the ADDI program to the HOCW with WCHR being the fiscal agency
- i Provide certification professional development for affordable housing practitioners and homebuilders
- i Lead Abatement
 - o Units of Cleared of Hazards-190
 - o Community Outreach and Education Goals- 75
 - o Training goals- 200

Year 3 (July 2012 – June 2013):

- i 800 people participating in foreclosure counseling via inquires and counseling- 60% of these people facing foreclosure will stay in their homes
 - i Work with the City to become the gateway for all home rehab in the city
 - i Community Partners Survey
 - i 1000 first time homebuyers will participate in homebuyer education- with 360 buying homes
 - i Expansion of First time HomeBuyers Classes into 3 surrounding communities
 - i 100% of staff will improve their professional development
 - i Work with city to revise ADDI policies and procedures
 - i Provide certificate professional development for affordable housing practitioners and homebuilders
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**Real Estate Development
Activities, Goals, and Timeline 2010 – 2013**

Priority Issues:

- 1) Community Stabilization and Sustainability**
- 5) Organizational Financial Sustainability**

Corresponding Programs:

- i Community Stabilization
 - o Foreclosure Initiative
 - o Blight Initiative

Year 1 (July 2010 – June 2011):

- i Annually Track referrals to HOCW from neighborhood; track outcomes
- i Advocate for and engage Neighborhood Revitalization Strategy Area (NRSA) funds to assess and support neighborhood homeowners' needs (2010-2011)
- i Advocate for and engage Community Loan Funds to support neighborhood homeowners' emergency and down payment assistance needs (2010-2011)
- i Shift strategies from development to rehab: City-wide rehabilitation capacity (2010)
- i Increase rental portfolio from 111 units adding 12 units (2011)
- i Become a member of "First Look" program, a clearinghouse for foreclosed properties that offers first right of refusal – partnership with National Community Stabilization Trust, CHAPA, City of Worcester (December 2010)
- i Maintain participation in Receivership program
- i Develop criteria for property assessment for use with "First Look" and Receivership programs – criteria to include the definition of concentrated geographic stabilization areas in which to focus (2011)
- i Develop foreclosed and receivership property in the neighborhood into rehabilitation pipeline; 2 unit structures
- i Measure and report code violations/conditions for all properties developed; pre and post rehab
- i Incorporate "Green Building" practices, Energy efficient and Sustainable practices into housing rehabilitation work: Certify key staff person and ensure capacity of rehab workers (2011)
- i Develop Real Estate Development Business Model that cash flows (2011)
- i Establish neighborhood impact baselines for Banis Park, Tot Lot, Vernon Hill, Mulcahy Field development (2010)
- i Annual resident satisfaction survey; parts of which will track duration of residency, OH property purchase, tenancy in OH properties
- i Annual assessment of Real Estate Development plan in conjunction with data review (inclusive of demographics and resources) to modify plan and retain a conservative approach
- i Maximize collaborations with the City and other nonprofit partners to capture and deploy funds; and increase production and outcomes; Explore regional system of data collection and coordination with each of the HOCW partners; utilize annual Memorandum of Agreement renewals to explore this development (2011)

- i Stabilize Commercial areas: Complete Commercial streetscape development in lower Grafton Street area; Extend work with state funds acquisition (2010); Advocate for and support the Commercial streetscape development in the Canal District area (2011)
- i Work with Grafton Hill Business Association to further development of business district and capitalize on CSX Corporation investments (2010-13)
- i In conjunction with Community Engagement, execute annual Business Survey
- i Workforce Development Partnerships with Walmart and other business areas to facilitate access to area communities of color (2010-2013)
- i Engage results of annual business and resident survey to inform and influence community stabilization
- i Participate in Harvard University's Achieving Excellence Program
- i Participate in development related to Union Hill School; engage in opportunities to provide resources for community and school stabilization (2010-12)

Year 2 (July 2011 – June 2012):

- i Annually Track referrals to HOCW from neighborhood; track outcomes
- i Advocate for and engage Neighborhood Revitalization Strategy Area (NRSA) funds to assess and support neighborhood homeowners' needs (2010-2011)
- i Advocate for and engage Community Loan Funds to support neighborhood homeowners' emergency and down payment assistance needs (2010-2011)
- i Increase rental portfolio from 111 units adding 12 units (2011)
- i Maintain participation in Receivership program
- i Develop foreclosed and receivership property in the neighborhood into rehabilitation pipeline; 2 unit structures
- i Measure and report code violations/conditions for all properties developed; pre and post rehab
- i Develop strategy to redetermine use/marketing of 5 vacant lots currently in portfolio (2011); execute strategies (2012-13)
- i Explore alternative housing development: (2012-13)
- i Vet for-profit real estate development projects in the neighborhood (Chevalier, Ascension Church, St. Casimir's School/Convent) (2012-13)
- i Provide leadership and coordination in the development of a Master Plan for the neighborhood in conjunction with appropriate City of Worcester departments and Worcester Academy (2011-2012)
- i Secure Harrison Street (closed) bar for redetermination of use (i.e. green space or parking); Site control (2011); Purchase, raze (2013)
- i Support athletic field development in collaboration with Worcester Academy (2011)
- i Explore new complex development at Vernon Park and new water park development at Crompton Park (2011-2013)
- i Annual resident satisfaction survey; parts of which will track duration of residency, OH property purchase, tenancy in OH properties
- i Annual assessment of Real Estate Development plan in conjunction with data review (inclusive of demographics and resources) to modify plan and retain a conservative approach
- i Stabilize Commercial areas: Advocate for and support the Commercial streetscape development in the Canal District area (2011); Achieve designation for the Millbury Street area (2012)
- i Work with Grafton Hill Business Association to further development of business district and capitalize on CSX Corporation investments (2010-13)

- i Develop Marketplace Opportunities feasibility study (2013) in conjunction with local Farmer's Markets; explore Canal District and Millbury Street Business Areas to build on NRSA successes
- i In conjunction with Community Engagement, execute annual Business Survey
- i Workforce Development Partnerships with Walmart and other business areas to facilitate access to area communities of color (2010-2013)
- i Engage results of annual business and resident survey to inform and influence community stabilization
- i Participate in development related to Union Hill School; engage in opportunities to provide resources for community and school stabilization (2010-12)

Year 3 (July 2012 – June 2013):

- i Annually Track referrals to HOCW from neighborhood; track outcomes
- i Maintain participation in Receivership program
- i Develop foreclosed and receivership property in the neighborhood into rehabilitation pipeline; 2 unit structures
- i Measure and report code violations/conditions for all properties developed; pre and post rehab
- i Develop strategy to redetermine use/marketing of 5 vacant lots currently in portfolio (2011);Execute strategies (2012-13)
- i Explore alternative housing development: (2012-13)
- i Vet for-profit real estate development projects in the neighborhood (Chevalier, Ascension Church, St. Casimir's School/Convent) (2012-13)
- i Secure Harrison Street (closed) bar for redetermination of use (i.e. green space or parking); Site control (2011); Purchase, raze (2013)
- i Explore new complex development at Vernon Park and new water park development at Crompton Park (2011-2013)
- i Annual resident satisfaction survey; parts of which will track duration of residency, OH property purchase, tenancy in OH properties
- i Annual assessment of Real Estate Development plan in conjunction with data review (inclusive of demographics and resources) to modify plan and retain a conservative approach
- i Maximize collaborations with the City and other nonprofit partners to capture and deploy funds; and increase production and outcomes; Explore regional system of data collection and coordination with each of the HOCW partners; utilize annual Memorandum of Agreement renewals to explore this development (2011-12)
- i Stabilize Commercial areas: Advocate for and support the Commercial streetscape development in the Canal District area: Deliver Commercial streetscape development in Millbury Street area (2013)
- i Work with Grafton Hill Business Association to further development of business district and capitalize on CSX Corporation investments (2010-13)
- i Develop Marketplace Opportunities feasibility study (2013) in conjunction with local Farmer's Markets; explore Canal District and Millbury Street Business Areas to build on NRSA successes
- i In conjunction with Community Engagement, execute annual Business Survey
- i Workforce Development Partnerships with Walmart and other business areas to facilitate access to area communities of color (2010-2013)
- i Engage results of annual business and resident survey to inform and influence community stabilization

**Resource Development
Activities, Goals, and Timeline 2010 – 2013**

Priority Issues:

5) Organizational Financial Sustainability

1) Community Stabilization and Sustainability

2) Community Engagement

3) Increasing awareness of our Brand

4) Expansion to underserved people and communities

Program Tools:

- i Resource Development Plan
- i Branding
- i Marketing Plan
- i Marketing Segmentation plan

Year One July 2010-June 2011

- i Resource Develop. Committee, Exec. Director and Resource Develop. Manager review of Resource Develop. Plan (July 2010)
- i Form a board committee for special events (Aug 2010)
- i Develop new website (Oct 2010)
- i Develop new public relations packet for new identity (Nov 2010)
- i Gather names and Build donor base to 400 names (Dec 2010)
- i Mail Annual appeal with a goal of raising \$20,000 (Jan 2011)
- i Complete Name Change with DBA (Jan 2011)
- i Hold training for Board & Staff about Marketing & Communications plan (Feb 2011)
- i One large Special Event raising \$15,000(April 2011)
- i Begin use of Constant Contact to survey constituents on a regular basis (March 2011)
- i Monthly constant contact e-newsletters (Monthly)
- i Executive Director and Resource Development manager review of Resource Development Plan (Bi-monthly)
- i Increase use of current social media by 2 mediums of media (June 2011)
- i Identify new/potential grant sources raising \$70,000 of new funding (June 2011)
- i Have staff members Attend 50 Worcester Community Events (June 2011)

Year Two July 2011- June 2012

- i Resource Develop. Committee, Exec. Director and Resource Develop. Manager review of Resource Develop. Plan (July 2011)
- i Begin using community calendar with managers to target events. (Aug 2012)
- i Mail Annual appeal with a goal of raising \$25,000 (Jan 2012)
- i Survey of funders (April 2011)
- i Survey staff and board about important events for a representative to be at (March 2011)
- i Monthly constant contact e-mailings (monthly)
- i Identify new/potential grant sources increasing to \$100,000 of new funding (June 2012)
- i Increase Donor database to 700 names (June 2012)

- i Hold One large- goal \$20,000-and two small special events fundraisers - Goal \$5,000 (June 2012)
- i Exe. Director and Resource Develop. Manager review of Resource Develop. Plan (Bi-monthly)
- i Have Staff members attend 75 Worcester Community Events (June 2012)
- i Increase use of social media by 2 mediums of media (June 2012)

Year Three July 2012-June 2013

- i Resource Develop. Committee, Exec. Director and Resource Develop. Manager review of Resource Develop. Plan (July 2012)
- i Monthly constant contact e-mailings (Monthly)
- i Exe. Director and Resource Develop. Manager review of Resource Develop. Plan (Bi-monthly)
- i Identify new/potential grant sources increasing to \$130,000 of new funding (June 2013)
- i Increase Donor database to 1000 names (June 2013)
- i Mail Annual appeal with a goal of raising \$30,000 (June 2013)
- i Hold one large-goal \$25,000-and three small special events fundraisers - goal \$7,000 (June 2013)
- i Have Staff members attend 100 Worcester Community Events (June 2013)
- i Increase use of social media by 2 mediums of media (June 2013)

The Process - Overview

Oak Hill Community Development Corporation (Oak Hill CDC) initiated its preliminary strategic planning process in April 2010. With the assistance of the NeighborWorks®, Oak Hill CDC sought to develop strategies, inform decisions, address issues and identify goals that would assist the organization in continuing to improve its operations and service outcomes. Impact Resources Consulting was selected to facilitate the process with Board members and staff.

In March, the OHCDC Management Team, Board leadership and consultants crafted a plan for the development of a Strategic Plan. Data collection began to inform the Strategic Planning process; this data included interviews with key staff and area business owners as well as focus groups with adult and youth residents.

Preliminary work on the plan began at the Board of Directors meeting on April 23rd. The session was facilitated by two consultants and included an introduction and review of the planning process, highlighting key components.

Following, initial work was done to review the current mission statement and organizational name and the identification of agency key values. The staff participated in this review as well as the identification of goals and objectives for the three years of the plan, grounded in the data collected and analyzed with a process facilitated by the consultants. Adult and Youth residents were engaged in a corresponding process of goal development simultaneously with a board member and the Community Engagement staff as facilitators.

In May of 2010, a survey was completed of board members and staff to finalize the development of a new mission statement and define the organization's new name.

In July, a full-day retreat was held which involved both staff and board members. All previously developed plan components were reviewed and prioritized. Then, strategic issues were identified and work plans were developed for each line of business as well as larger organizational development areas.

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.

Mission Review and Recommended Change Process

Key questions related the organizational mission components, as well as a working definition of a mission statement, were discussed. They included:

- ✓ Who we are? What business are we in?
- ✓ What are the needs we exist to fill?
- ✓ How do we want to respond to/anticipate these needs?
- ✓ What makes us unique?

Also reviewed were key words/phrases emerging most frequently from the survey that was completed were:

- i Educate
- i Engage
- i Provide opportunities
- i Elevate the community
- i Connections
- i Facilitates
- i Enhance
- i Revitalize
- i Connect

After a lengthy discussion, the residents, Board, and staff selected the following as the new mission statement and a vote was taken by the members of the Board approving this change.

It was also recommended that the organization consider adopting the following **vision statement** which will be reviewed and revised by the Resource Development Sub-Committee for Marketing and Communications for future presentation and approval.

“Oak Hill CDC exists to elevate the economic status and improve the quality of life for our community and its’ residents.”

The new mission (approved), vision and values statements, and tag line (once approved) should be included in written materials about the organization and the staff be well-versed regardless of line of business to provide a brief, focused description of the guiding goals and principles driving organizational development and implementation. An additional recommendation made by staff and Board members included the development of a ‘tag line’ for Oak Hill CDC. This brief statement could have powerful impact, succinctly identifying the core of the work. Focus statement ideas that have come through with the planning exercises are:

- *Organizing one neighbor at a time*
- *Engaged communities creating lasting change*
- *Building community*
- *Building communities, empowering residents*
- *Always in touch with heart of the community*
- *NeighborWorks ® when others can’t*
- *Partners in building community*
- *Working with you to build a better neighborhood*
- *A community of commitment and change*
- *Helping you build strong and vibrant neighborhoods*

Predictably, one of the most challenging issues with which Oak Hill CDC is facing, is the rapidly changing external environment. Adaptive change strategies could include a regular search of 'best practices' from the field to identify alternatives in dealing with emerging issues. Other adaptive change strategies can be grounded in the renewed commitment to be data-driven, grounded in strong production and impact measurement as well as inclusive processes for reassessment and revision. Partnerships with other Community Development Corporations and NeighborWorks® organizations may also provide Oak Hill with information and will serve to increase the 'think tank' for programs, solutions and strategies.

Demographic Scan

Oak Hill Community Development Center has focused on the 01604 area of Worcester, MA to target and implement strategies related to their various programs and evaluate annual progress. This overview of the neighborhood is followed by data mined in 2010 to support this examination.

The neighborhood:

- i Residents comprise a diverse racial and ethnic population, with many foreign-born residents and a multitude of different languages spoken
- i There are slightly more females than males in the area
- i Approximately 75% of the population is age 18-64
- i The poverty rate is higher in this area than in the state as a whole with a cost of living index of 119.7
- i 46% of the population works and majority work close to home; within the first 3 months of 2010, 1.89% was engaged in employment related services. Unemployment rates for Worcester, MA during this period ranged from 9.8% in January, 10.4% in February and 8.6% in March.
- i Average annual household income is \$38,000, lower than the state average
- i Majority of the population are renters paying between 20 & 25% of their gross income on rent and most residencies were built before 1950; There were 58 foreclosures in the neighborhood as of May, 2010
- i There is a lot of physical neighborhood distress including trash, vandalism, unkept properties and lots.
- i Crime is primarily related to traffic challenges and public disturbances
- i Although neighborhood schools are improving their MCAS scores, most are still lower than other schools in the city, and one elementary school in the 01604 has been taken over by the state because of its underperformance.
- i The population of these schools is diverse with many students whose first language is not English and majority low-income families. These schools also have high mobility rates indicating transiency in the neighborhood.

Survey Results

- i Focus groups with neighborhood residents in 2010 reveal that adults are worried about drugs, speeding/reckless driving, violence, police relations, trash, landlord cooperation, lack of jobs, quality of life in the neighborhood, and housing.
- i Youth are worried about friends drinking & smoking, hanging out in the streets, not enough places/activities for youth; Their families worry about violence, teen pregnancies, teens dropping out of school and peer pressure.


01604 Demographic Data Profile

TOTAL POPULATION		33,731
Age		
i	18-64	26,170 77.6% of the region
i	65 & up	5,757 17.1% of the region
Race		
i	White	28,165
i	Black	1,568
i	Asian	1,695
i	Latino	2,951
Immigration		
i	Foreign Born	4,388
Housing		
i	Total Housing	14,712
i	Occupied	14,051
i	Owner Occupied	6,334
i	Renter Occupied	7,717
i	Vacant	661
Employment		
i	In labor force	16,319
Income		
i	People below poverty line	4,442
i	Median Family Income	44,766

Source: United States Census Bureau

http://factfinder.census.gov/servlet/SAFFacts?_event=Search&geo_id=&geoContext=&street=&county=01604&cityTown=01604&state=&zip=01604&lang=en&sse=on&pctxt=fph&pgsl=010&show_2003_tab=&redirect=Y

People

Population (2000): 33,731  (47.7%)

Males: 16,097

Females: 17,634  (52.3%)

Estimated population in 2008: 34,120

Median resident age:  36.0 years

Massachusetts median age:  36.5 years

Foreign born population: 4,388

01604:  13.0%

Massachusetts:  12.2%

Most common places of birth for foreign-born residents:

- i Brazil (12%)
- i Vietnam (11%)
- i Italy (7%)
- i Other Eastern Europe (6%)
- i Ghana (4%)
- i Poland (4%)
- i India (4%)

Source: <http://www.city-data.com/zips/01604.html#ixzz0pZbXPHs8>

Youth Indicators

	Grafton St. School	Lake View	Rice Square	Roosevelt	Union Hill	East Middle	North High	City	State
Race Ethnicity (%)**									
African/American or Black	14.1	10.0	15.1	7.4	17.7	14.3	19.2	13.8	8.2
Asian	9.4	11.4	7.4	5.7	4.8	7.7	8.4	8.1	5.3
Hispanic or Latino	42.7	17.1	27.2	35.5	51.1	45.4	41.3	37.3	14.8
Multi-race, non-Hispanic	3.6	3.0	4.8	3.9	8.4	1.6	1.7	3.0	2.2
Native American	0.8	0.0	0.6	0.0	0.0	0.5	0.1	0.3	0.3
Native Hawaiian or Pacific Islander	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
White	29.4	58.5	44.9	47.4	18.0	30.5	29.4	37.5	69.1
Selected Populations (%)**									
Limited English Proficiency	37.5	35.1	31.2	32.0	38.9	25.5	20.8	26.6	6.2
Low-Income	85.9	61.9	68.2	59.9	97.4	89.7	80.3	71.8	32.9
Special Education	16.1	10.0	13.5	21.3	19.9	27.1	24.5	20.4	17.0
First Language not English	41.9	38.1	33.0	35.8	42.1	49.2	48.5	41.3	15.6

** Bolded numbers indicate percentages that exceed city averages

Strategic Issues

- i In 2009 the percentage of students at Union Hill who enter or leave the district mid-year was 36.2%
- i The stability rate—the percentage of students who stayed at the school for the entire year—was only 78.8%. That means nearly 1/3 of the school's students arrived or left mid-year.
- i In March of 2010, the state designated Union Hill as a “Level 4” public schools, considered to be “underperforming” by state standards, using four years of MCAS scores as the major determining factor.

Source: *Changing of the School Yard*, Worcester Magazine <http://worcestermagazine.com/content/view/5411/>

Employment and Income Characteristics

Percentage of zip code residents living and working in this county: 82.7%

Employed Females: 7450

Employed Males: 8005

Work At Home: 246


Median Family Income: \$44766

Median Household Income: \$37497

Per Capita Income: \$19721

Average Adjusted Gross Income (AGI) in 2004:

01604:  \$37,710

Whole state:  \$62,877

Residents with income below the poverty level in 2008:

01604:  11.2%

Whole state:  10.0%

Residents with income below 50% of the poverty level in 2008:

01604:  5.3%

Whole state:  4.5%


Source: <http://www.city-data.com/zip/01604.html#ixzz0pZcrbErZ>

Housing / Neighborhood Conditions

Dec. 2009 cost of living index = 119.7 (more than average, U.S. average is 100)

Houses and condos: 14,712

Renter-occupied apartments: 7,798

% of renters in 01604:  55%

State:  38%


Estimate of real estate property taxes paid for housing units in 2008:

01604:  2.3% (\$1,748)

Massachusetts:  1.9% (\$2,336)

Average household size:

01604:  2.3 people

Massachusetts:  2.5 people

Source: <http://www.city-data.com/zip/01604.html#ixzz0pZZuR97K>

Foreclosure Listings (As of 5/30/10)

Total Foreclosures = 58

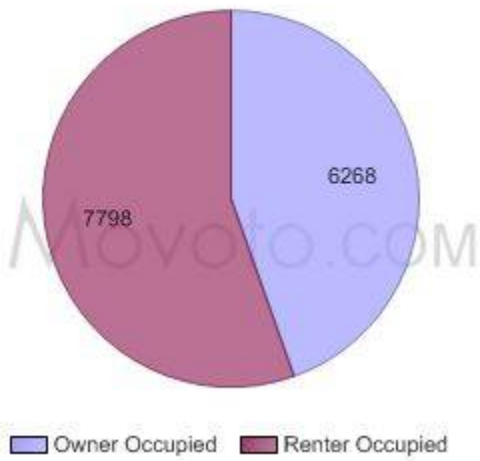
Housing Type:

Unknown	Condo	Single Family	Multi Family	Town House
37	4	8	7	2

Source: <http://www.foreclosure.com/?rsp=20773>

Rental Information

Owner vs Renter Occupancy

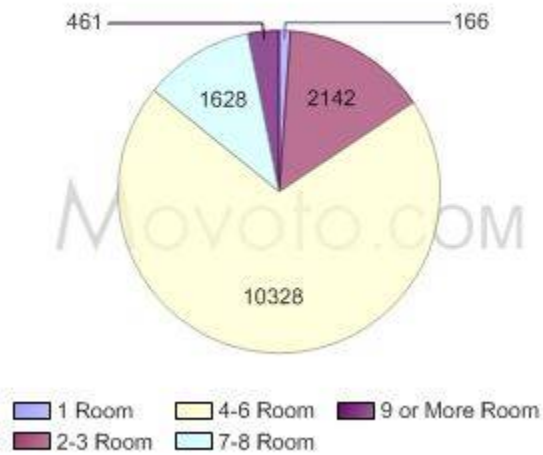


Rents of Renter Occupied Units

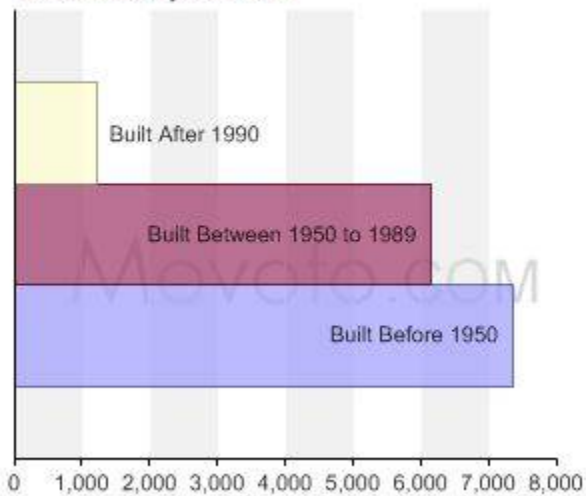


Neighborhood Housing Characteristics

Number of Rooms in Residences



Residences by Year Built



Source: <http://www.movoto.com/neighborhood/ma/worcester/01604.htm>

Mandates

Mandates are a critical piece of the strategic planning process. These mandates help to shape the operations of the organization. Formal mandates are those that the agency must follow in order to remain in business. A formal mandate prescribes what the organization must do under organizational charter and policies, as well as under federal, state, and local laws, codes and regulations. Formal mandates can include contracted services required by funding sources in addition to those mentioned before. Informal mandates are those which are required or believed to be required to do based upon mission, community expectation, procedures and budget recommendations.

The following formal mandates and their implications for programming resource allocation and impact were chosen as being *the most challenging*:

1. Financial Management – described by a participant as the ‘guts’ of the work that the agency does. Funders and internal operations require this. Effects of this mandate includes cost (it is currently outsourced), infrastructure, policy, oversight and getting continued funding to pay for projects, staff and housing.
2. Connectedness to Neighborhood – also marked as informal. This element is required by Oak Hill CDCs by-laws and by neighborhood residents (informal). The impacts include time, commitment, greater participation and ownership.
3. Leadership Development (Youth and Adult) – also marked as informal. This was identified as required by funders, Board of Directors, residents and the nature of the work of the CDC. The effects identified included costs, commitment, challenge, and greater capacity to do the work and greater community impact.

The following informal mandates and their implications for programming resource allocation and impact were chosen as being *the most important*:

1. Community Organizing/Outreach – identified as being an internal expectation. The effects were increasing resident engagement to improve their areas themselves, and encouraging resident leaders.
2. Engaging Resident Participation – discussed as an expectation of the mission of Oak Hill CDC. The main effect was singular relevancy to the work of the agency.
3. Fundraising – needed as budgetary requirement and needs of the organization. The effects are increasing operating funds, commitment, cost, minimal skills, and ‘headaches’.

Strengths, Weaknesses, Opportunities and Threats

As part of the organization's strategic planning process, the staff and Board of Oak Hill CDC completed an assessment of the agency's strengths, weaknesses, opportunities and threats (SWOT analysis). Through this analysis, the participants had an opportunity to assess internal factors as well as external factors that could impact the operations of the agency.

Strengths – internal resources or capabilities that help Oak Hill CDC to accomplish its mandates or mission

- i Great staff, employee benefits and professional development
- i First-time home buyer program
- i City of Worcester and MA Department of Housing & Community Development (DHCD) – their relationship with the HOCW, financial resources and political power they bring
- i Multiple Partnerships (large and small; formal and informal)
- i (Emerging) Communications – newsletters, press releases, staff
- i (Emerging) Advocacy at the highest level – we can speak to what's happening locally (as we are hand's on) and others are asking us what's going to work (because we know)
- i Transparency of finances and operations
- i Line of Business budgets –now each manager has control and can make informed decisions
- i Return on investment – for every \$1, we match \$260 (but who knows this?)
- i Quality of housing produced
- i Sustained effort through involvement of community youth
- i History of organization – it was started by neighborhood residents
- i Community Engagement programs
- i Comprehensive approach to problems
- i Selecting Board members and their assets strategically
- i Diverse community demographics

Weaknesses – internal deficiencies in resources and capabilities that hinder Oak Hill CDCs ability to accomplish its mandates or mission

- i Marketing and Communication – to the community and especially the website
- i Real Estate Development – production
- i Need to increase leadership development and collaboration in targeted subcommunities (specific populations)
- i Reporting & Production – there is much that has gone unreported or underreported – in the future this can change
- i Finance Committee oversight; Great Treasurer and Audit Committee – plan for their sustainability, leadership development to prepare for succession
- i OHCDC needs funds to increase staff hiring – particularly in Administrative Support, Community Engagement, Real Estate Development and to achieve greater diversity (no Spanish speaking capabilities currently)
- i We need a sustainable business model – examine the HR impact, contracting, outsourcing
- i Lack of long-term, multi-year funding that is unrestricted to cover expenses associated with administration of programs which are currently not reimbursable, unfunded mandates and various community engagement projects.
- i Keeping up with changing community. Currently, we respond to change in a reactive way – we need to become more proactive, anticipate changes through forecasting and create a culture of positive response to change.

Opportunities – external factors or situations that can affect Oak Hill CDC in a favorable way and help achieve its mission

- i NeighborWorks® America – what they bring to OHCDC – technical assistance, expertise, financial resources, training
- i Housing is a “hot topic” now – current conditions are favorable for focus of the organization’s efforts
- i Available Property for Rentals – achieving cash flow, economy of scale (increasing portfolio)
- i NeighborWorks® America –it means we can be full service and that we are positioned with the City of Worcester; offers us financial resources, certification opportunities, an organizational ‘stamp of approval’, the opportunity to ‘teach others’ how to do it; powerful lobbying that is nonpartisan
- i City of Worcester and DHCD – through them we tend to get the first money for new programs, recognizes our highly professional staff (we are trained) and also that we are the community
- i Reinventing what it means to be a CDC – used to be a housing builder; now much more/different – able to respond to needs/market – be creative
- i ReBranding – new name, mission, tag line and all that will go with it
- i Need to increase leadership development and collaboration in subcommunities (specific populations)
- i Worcester Academy – resources they bring, training, facility use, collaboration in neighborhood strategy
- i Joining the NeighborWorks® America Multifamily Initiative – benefits!
- i Explore use, selection criteria and supervision capacity of Project A.B.L.E. Vista Volunteers and Service-Learning students
- i Positive relationships and work with current municipal staff to further the goals of neighborhood ‘livability’

Threats – external factors or situations that can affect Oak Hill CDC in a negative way

- i City of Worcester and DHCD – others want the HOCW to ‘do it’ – city assigns us tasks as if we were theirs; politics is infused in the program management, unfunded mandates, outsourcing to us
- i NeighborWorks® America – their funding is predicated on the federal government and ours, therefore; our rating with them is critical – related to funding
- i The cost of benefits is constantly rising
- i The HOCW MOU , involving multiple agencies, is unclear about chain of command
- i Large number of residents in our service area

Define Constituencies

“Constituents” for OHCDC are those who use the services of the agency and those who are involved with or have a relationship with the agency. They are involved and are driven by WIIFM (or “what’s in it for me?”). A full team brainstorming activity helped to identify the following customers, their reason for involvement and what they receive from their involvement.

Constituent	Reason for Involvement	What do they/we get?
Youth	Need Structure	Structure through programs
Unemployed persons	Need work	Direction, assistance and information
Homeowners (at HOCW)	Services	Information on services available; education; assistance
City of Worcester, Neighborworks®, Worcester Academy, other government	Support operations of the agency	Shared values working towards common goals
One-Stop Career Center	Provides resources for job seekers and partners in neighborhood job fairs	Helps them to fulfill their mission of “providing opportunities and training”
Residents and families	Needs for multiple and varied services suited for multiple generations	Connection to services improves quality of life
Foundations	Required to give a certain percentage of interest away	Agency serves as a conduit to fulfill the stated foundation mission
Banks	Community Reinvestment Act requires them to give money to the community	Keep their positive ratings; they don't receive fines for non-compliance
Other Community Organizations	Connection to people served in the OHCDC area	Helps to actualize their missions and goals
Renters	Need affordable housing	Affordable housing provided with supportive management
Potential Home Owners	Need access to 1 st time home buyers mortgage products	Education and certificate of course completion
Public Safety including law enforcement and fire department	Focused on keeping the neighborhood safe	Assistance in identification of public safety issues and community trust
Small Businesses	Need technical assistance; need employees	Technical assistance; Government support
Schools	Need families to be stable in order for children to learn	Assistance in family outreach and stabilization; Additional opportunities for family members provided by the agency
OHCDC Employees	OHCDC needs the skills, accomplishments and talents of people with values congruent with the work of the agency	Agency has dedicated staff to impact community who are recognized through financial and other means
Board of Directors	OHCDC needs volunteers who want to support improvement in the community	Efforts improve the neighborhoods; provide leadership development opportunities for residents; creates shared knowledge and expertise
Volunteers	Residents with similar values of community development are looking to “help”; some volunteer hours are mandated by government agency	Improvement in the community; a chance to ‘give back’; compliance with volunteer directive

