



EVERYBODY MATTERS

**South Middlesex Opportunity Council
Chief Executive Officer
Framingham, Massachusetts**

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

The Search

The South Middlesex Opportunity Council (SMOC) – a human services organization dedicated to organizing resources for social change and economic independence across Massachusetts – seeks a visionary, mission-driven Chief Executive Officer (CEO) who can build upon the agency's significant record of accomplishments. Originally founded as a community action agency in 1965, SMOC has grown to serve more than 46,000 people through a multi-faceted portfolio of more than 50 distinct programs that range from housing to behavioral healthcare to education. For FY2021, SMOC's budget is \$113.3M with a staff of between 800-900 individuals.

SMOC was founded with the belief that Everybody Matters. Since 1965, the agency has grown to include an interconnected web of services in five main areas: housing; behavioral health; education, employment, and training; energy and financial assistance; and family and nutrition. As much as possible, these programmatic offerings are co-located so that individuals and families can access what they need without visiting multiple sites. The organization is deeply committed to providing safety net services that otherwise would not exist.

SMOC has experienced many years of success and growth under the leadership of long-time Executive Director Jim Cuddy, who will retire in 2021 after more than 35 years of service to the organization. Under Cuddy's leadership, SMOC has expanded its work across Massachusetts while also establishing a strong reputation as an innovative and consistent provider of services.

The next leader will bring a demonstrated commitment to the mission of SMOC, a record of programmatic vision and business savvy, and will have proven experience leading an organization or unit of similar complexity. The successful candidate will have extensive experience with external relations, including forming and maintaining strategic partnerships, liaising with government agencies, promoting resource development, and representing an organization as its

public face. Demonstrated success in working effectively with a board, building and sustaining employee engagement, championing diversity, inclusion and equity, participatory decision-making, and staff development is essential.

The COVID-19 pandemic has presented SMOC with unique challenges. The organization had to quickly pivot its operations in March 2020 to ensure that its programs would continue to run as much as possible, albeit with significant changes in terms of delivery. In all but a few cases, SMOC has been able to maintain its services, including residential facilities. With the severe economic downturn, demand for the agency's offerings has risen significantly, especially in terms of food and housing support. While the Commonwealth of Massachusetts has maintained level funding on its grants and contracts thus far, the long-term impacts of the pandemic are still to be seen.

SMOC has retained Isaacson, Miller, a national executive search firm, to assist in this search. All inquiries, nominations, and applications should be directed in strict confidence to the firm as indicated at the end of this document.

Background of the Organization

SMOC was originally incorporated in 1965 by local community members. They were guided by the mandates of the Economic Opportunity Act of 1964, a key component of President Lyndon Johnson's "War on Poverty." SMOC was one of close to 1,000 community action agencies established in the mid-1960's and is the designated community-based anti-poverty agency for one city and nine towns in the MetroWest area of Massachusetts. As a community action agency, SMOC seeks to create new opportunities for self-sufficiency through community advocacy on both a local and state-wide level. Additionally, SMOC centers the involvement of community members in the policy and decision-making processes at the organization.

SMOC is a multi-service agency providing integrated, community-based services in the following areas: housing; behavioral health; education, employment, and training; energy and financial assistance services; and family and nutrition. All of SMOC's programs apply best practices in environments that are client-centered, culturally appropriate, strengths-based, and trauma-informed.

The agency is deeply committed to its values, which include:

- Respect for the dignity and value of every individual.
- Appreciation for the value of diversity and an end to racism and discrimination.
- Freedom from violence, including domestic violence and sexual assault.
- The right to housing and the abolishment of homelessness.
- The right to health care.
- Freedom from hunger.
- The elimination of poverty.
- The right to work for a living wage.

- Easy access to social supports through co-location of social services.
- SMOC's employees are its greatest strength.

Since its inception, the agency has continuously evolved in response to the wide range of challenges that people living in the community face. Starting in 1998, SMOC expanded its mission to address the housing and supportive service needs of homeless and at-risk single adults in Middlesex, Worcester, and Hampden Counties. In the first decade of the 21st century, SMOC affiliated with both the Greater Worcester Housing Connection and Open Pantry Community Services. More recently, SMOC affiliated with and assumed operation of the Lowell Transitional Living Center.

In FY2020, the agency completed construction of a new SMOC Behavioral Health Center; redesigned the Framingham Recovery and Support Center; and renovated the Framingham Community and Cultural Center. Moving forward, SMOC has instituted a new Capital Repair Initiative that will provide and guide investments towards upgrades and renovations at the agency's current property holdings.

Description of Programs and Services

Through its interconnected network of co-located social services, SMOC recognizes that the lives of individuals and families are complex and that their needs are interrelated. The agency's holistic programming is designed to be a "one-stop shop" for clients. A comprehensive list of offerings can be found on [SMOC's website](#).

SMOC Housing

SMOC believes that housing is a right and provides stabilizing resources so that individuals and families can live in affordable, safe environments. The agency operates an integrated housing and services delivery system for individuals and families experiencing homelessness that includes case management and supportive health, human services, educational, and employment programming. In addition to owning, developing, and managing a large network of affordable housing options, SMOC also owns a network of supported housing options. The agency manages a substantial federally funded rental housing assistance program (Section 8). In FY2020, SMOC helped nearly 3,000 homeless individuals obtain safe and supportive housing in emergency shelters and transitioned more than 1,500 people from emergency shelter into permanent housing.

SMOC's nonprofit housing arm is a wholly owned subsidiary of the organization with approximately 150 properties. This part of the agency is responsible for the initial acquisition, financing, and renovations of properties, plus their on-going management and maintenance. The complex nature of SMOC's housing presence in Framingham and throughout Massachusetts, especially in housing people who oftentimes do not have anywhere else to go, makes this a critical part of the agency's offerings.

Behavioral Health

SMOC's behavioral health division provides substance use and mental health outpatient services to adults, children and families. In addition, the agency provides substance use recovery residential services, court diversion groups, and recovery programs. In FY2020, 2,122 clinic patients received comprehensive outpatient services from SMOC Behavioral Healthcare.

Education, Employment & Training

SMOC offers a variety of workforce development and educational programs, including HiSET and ESL classes; a Green Jobs Academy that trains people for careers in the weatherization industry; job fairs; and courses on banking, credit, and housing. The goal of these programs is to build assets that enable stable employment and advancement for SMOC clients. In FY2020, 62 people completed ESL courses, 31 were involved with HiSET preparation, and 282 participated in workforce development initiatives.

Energy & Financial Assistance

SMOC provides a variety of energy-related financial initiatives to support clients, including weatherization services, fuel assistance, and a home modification loan program. As with many of the agency's offerings, much of SMOC's work in this area is directly connected to its overall housing initiatives, including the extensive Section 8 program, which administers approximately 2,000 vouchers worth \$32M in rental payments annually. Additionally, in FY2020, more than 700 homes were weatherized and more than \$4.5M was paid in fuel assistance.

Family & Nutrition

Family and nutrition services provide healthy food, nutrition education, and child and family-centered education. SMOC supports childcare centers and home-based services, including Head Start programs. Additionally, SMOC runs the WIC program in the MetroWest area and provides both food pantries and access to prepared meals across the state. There are specialized initiatives for seniors as well as support for enrolling in food stamps and follow-up services. In FY2020, over 6,700 individuals facing food insecurity received meals and groceries at Open Pantry Community Services in Springfield. The agency also provides support, counseling, legal advocacy, and confidential shelter to people impacted by domestic violence and sexual assault. Approximately 6,000 individuals received domestic and sexual violence counseling and prevention through Voices Against Violence.

Organizational Overview / Current Context

The Chief Executive Officer oversees the organization's senior leadership team which includes the Chief of Staff, Chief Program Officer, and Chief Financial Officer, along with the senior directors of Housing, Administration and Finance, Policy and Planning, Real Estate, Resource

Development, and Human Resources. The organization is governed by a Board of Directors comprised of 20-25 business, nonprofit, and community leaders. There are also advisory boards representing SMOC's affiliate organizations. The agency relies on the contributions of a strong network of volunteers.

REVENUES/EXPENSES (*all from unaudited financials*)

In FY2020, SMOC served 46,102 individuals, including 41,376 families, in more than 400 communities across Massachusetts. The agency had revenues of \$117.49M, 73% of which came from government grants and contracts.

- Local funding: the cities of Lowell, Springfield, and Worcester
- State funding: a partial list includes the Massachusetts Departments of Children and Families, Early Education and Care, Public Health, Housing and Community Development, and Transitional Assistance, along with MassHealth, and the Office for Victim Assistance.
- Federal funding (most of which is contracted through state agencies): a partial list includes the Departments of Education, Energy, Health and Human Services, Housing and Urban Development, Justice, Labor, and Veteran's Affairs.

Additional sources of revenue included client resources (9%), third party billing (8%), resource development and in-kind donations (2.5%), and other programming and miscellaneous revenue (7.5%). SMOC's expenses were \$112.934M, 39% of which went to energy and financial assistance initiatives and 13% to individual systems of care. Other expenses included, though were not limited to, family and nutrition (12%), housing (11%), family services (9%), behavioral health (7%), and administration/fundraising (5%).

SMOC had a total of \$1.236M change in net assets for the year.

COVID REALITY

The COVID pandemic has had a significant impact on SMOC's employees and partner communities. As of the fall of 2020, the state of Massachusetts was still maintaining level funding for all grants and contracts, which has been an important component in ensuring the stability of SMOC's programming.

The agency developed systems to ensure that almost everyone could work from home as well as strict protocols to support 24-hour facilities as they remained operational. In adherence to local, state, and national guidance, SMOC created re-opening plans for all sites and welcomed a limited number of employees back onsite in June. Additionally, SMOC's headquarters became a free COVID testing site.

In response to heightened demand and supported by COVID-specific relief grants from a variety of partners, SMOC started a meal delivery program for families and individuals facing food

insecurity in the Framingham area. Since April 2020, SMOC has been delivering approximately 1,000 meals a week. Additionally, SMOC continued its efforts to ensure all clients were counted as a part of the 2020 Census. The agency also created a comprehensive, municipality based COVID service and resource guide.

Social and Economic Justice

Social and economic justice are at the core of SMOC's mission, and the organization is currently redoubling its efforts to identify and dismantle systemic racism both internally and externally. At SMOC, Black lives matter.

During the summer of 2020, SMOC operationalized a new Diversity Access, Inclusion, and Equity Committee to guide and provide leadership on social justice. Additionally, the agency has held on-going staff workshops that directly address the trauma caused by racism, police brutality, and racially motivated violence. The board has analyzed its recruitment and nomination policies and has partnered with community educators and organizers to ensure that the board better reflects the diverse communities in which SMOC works. Finally, the recently renovated Framingham Community and Cultural Center will offer support, resources, and programming to young people – in partnership with other community groups – so that they can become the next generation of social and racial justice leaders.

The Role

Reporting to the Board of Directors, the CEO is responsible for ensuring the overall management of the agency, including leading the senior staff team, maintaining and expanding partnerships, and developing new and on-going programs. The CEO oversees all the organization's activities and serves as a key public voice and advocate for its mission. The CEO will galvanize the board and staff around a clearly defined vision, ensure that it has the right organizational structure in place to meet its goals, and then delegate as appropriate. The CEO must also promote a sense of continuity for the organization's mission in the delivery of its programs and services. The successful candidate will be deeply connected to SMOC's mission and will bring the highest degree of integrity, wisdom, and trustworthiness in order to bring together all stakeholders – board, staff, and funders – to address the challenges ahead.

Opportunities and Challenges

The next president and CEO of SMOC will be expected to address the following key opportunities and challenges:

Build upon SMOC's standard as a high-value service provider to ensure continued success

The CEO will maintain and build upon the strong position SMOC has earned throughout its 55-year existence. This person will nurture the organization's entrepreneurial spirit in the pursuit of

creating the highest functioning, most holistically integrated network of client services across Massachusetts. In concert with the board and senior leadership team, the CEO will create a map of what currently exists at SMOC and will then develop clear criteria to assess how both new and existing initiatives preserve SMOC's core areas of competency and its financial stability, all with the aim of improving the lives of those it serves. In the short-term, especially given the on-going impacts of the pandemic, the new leader may need to make hard decisions about programs that SMOC can no longer support or areas into which the agency cannot currently expand.

The CEO will also expand SMOC's capacity to gauge the quality of its programs through the improved implementation of evidence-based practices and the continued development of protocols and metrics to measure program outcomes.

More closely align SMOC's client services to encourage a high-performing and collaborative culture

By design, SMOC operates a wide variety of programs to meet the interconnected needs of its client community. These services have different revenue streams, function under separate regulatory structures, and are geographically dispersed across the Commonwealth. While differences will always exist, there is an opportunity for greater communication and unification across these departments. Coordinated learning inside SMOC can provide new innovations that could have significant public use as well as promote a sense of inclusiveness and belonging throughout the staff. The CEO will strengthen internal communication channels and increase opportunities for cross-collaboration and support partnerships wherever possible.

Build upon strong existing relationships with key partners and stakeholders

Because much of the funding that SMOC receives is from government grants and contracts, the CEO will need to develop and maintain productive relationships with the various offices awarding grant monies as well as with elected officials, especially at the state level. Additionally, the CEO will serve as a thought leader on acute social needs and a convener of organizations across industries and sectors to address those needs that are most pressing, thereby further strengthening SMOC's brand recognition. The CEO will be the face of SMOC with existing stakeholders and will work across the agency to identify and cultivate new revenue-generating opportunities with external partners. This new leader will also ensure that the relationships between SMOC's main office in Framingham and its locations in other parts of Massachusetts are strong and functional.

Reevaluate and strengthen the organization's internal processes and infrastructure

SMOC has experienced growth in scale and impact over the past half-century thanks to entrepreneurial leadership. As it has matured and become an increasingly complex organization, it has become necessary to update systems and procedures to ensure greater efficiency. The CEO will evaluate current business operations and internal processes and make necessary updates to ensure greater efficiency so that SMOC is able to continue to best serve its community of both

staff and clients. This person will also identify opportunities to distribute and delegate decision-making across the organization, with a particular focus on the satellite locations outside of Framingham and MetroWest.

Champion efforts to cultivate a strong, stable, and diverse workforce

The staff of SMOC at all levels is key to the agency's success. Many staff members started as SMOC clients and have deep real-world experience with the organization's programming. The CEO will continue to build an equitable and inclusive organizational culture that appropriately reflects the organization's values. This person will work diligently with the HR department and with the Diversity Access, Inclusion, and Equity Committee of the board to ensure that the organization can attract and retain dedicated, competent, and diverse staff at every level. In a field that has incredibly high turnover nationwide, especially of frontline staff, the CEO will identify ways to incentivize and provide professional development opportunities, in addition to establishing equitable performance management systems agency-wide.

Provide transparent and resourceful leadership during times of uncertainty

The turbulence of the COVID-19 pandemic has proven destabilizing across all sectors, and SMOC has not been immune to this disruption. While SMOC has not yet lost significant funding and has been successful in transitioning its services in the face of the current reality, it will continue to be critically important for leadership to be forthright about the challenges and to pivot so that the agency can continue meeting the most pressing needs of the community. It will be incumbent upon the CEO to provide creative leadership during this and potential future crises and to do so with transparency as the organization evolves to meet these challenges.

Qualifications and Experience

SMOC seeks a compassionate, mission-focused leader who can lead the agency into its next phase of development. This new CEO must be a strategic thinker, transparent decision-maker, seasoned manager, and superb relationship-builder. The ideal candidate for this position at SMOC will bring the following professional experiences and personal attributes:

- Strong track record of successful leadership in a complex and dynamic organization with a demonstrated commitment to service excellence.
- Demonstrated understanding of and effective commitment to the empowerment of low-income people, self-help activity, and antipoverty activities.
- Ability to envision and convey the organization's strategic future, vision, and mission to the staff, board, volunteers, and donors.
- Demonstrated ability in successfully managing the acquisition, management, and financing of a complex real estate portfolio.
- Ability to develop and lead a positive, productive organizational culture.
- Ability to be a courageous and effective change agent.
- High-level strategic thinking and planning.

- A history of successfully generating new revenue streams and improving financial results.
- Ability to establish relationships with influential individuals and organizations including funders, partner agencies, and volunteers. Excellent donor relations skills and understanding of the funding community. Active fundraising experience preferred.
- Demonstrated commitment to diversity, equity, and inclusion.
- Solid organizational abilities, including planning, delegating, and program development.
- Strong financial management skills, including budget oversight, analysis, risk identification and mitigation, decision making, and reporting.
- Focus on accountability, using data and other information to ensure aligned, committed work.
- Strong written and oral communication, including public speaking, skills.
- Transparent, authentic, and high integrity communication and interactions.
- A master's degree in a directly related discipline will strengthen a candidate's application for this position.

To Apply

Inquiries, nominations, and applications with resumes and cover letters may be submitted to:

Donna Cramer and Phillip Petree, Search Co-Leads

Caitlin Barrett, Senior Associate

Isaacson, Miller

263 Summer Street, 7th Floor

Boston, MA 02210

<http://www.imsearch.com/7608>

Electronic submission of application materials is strongly encouraged.

SMOC will not discriminate against any applicant for employment with the agency because of race, religion, color, age, sex, national origin, veteran status, disability, sexual orientation, or any other protected class.