

## Partners in Progress Case Study: Fairfield County Community Foundation

“Can’t find a handyman? Hire a handywoman!” So read the business cards that Shaquana Shaw uses to promote her general contracting business. Described by friends as fearless and unflinchingly optimistic, Shaw is a businesswoman, mother of two, and resident of the Bridgeport Housing Authority’s PT Barnum Apartments, which are named after the famed showman who was the mayor of Bridgeport, Connecticut, in the 1870s. She came to PT Barnum in 2005, soon after high school graduation and the birth of her first son. Now a leader in PT Partners, Shaw is on the path to upward economic mobility and has helped to improve the quality of life at PT Barnum Apartments.

PT Partners is a collaborative group launched by Fairfield County’s Community Foundation (FCCF) in 2011 to engage residents in an integrated strategy to improve the quality of life at PT Barnum Apartments. In 2013, FCCF was selected as a grantee and community quarterback in the Partners in Progress (PIP) initiative, a national program funded by the Citi Foundation and managed by the Low Income Investment Fund. FCCF used PIP funding to hire the project director Kate Kelly, who is located on site at PT Barnum Apartments. Together with its partners in the collaborative, the foundation also used PIP funding to fortify PT Partners’ collaborative governance structure, to raise additional funding for training that aligned the partners around a common vision and set of goals, and to provide training to bolster resident leadership. The lessons learned throughout FCCF’s experience as a PIP grantee demonstrate how working in an integrated way provides the promise of improved outcomes for community residents.

### **The PT Partners Approach**

Inspired by a movement among peer community foundations and the Council on Foundations’ Framework for Community Leadership by a Community Foundation, FCCF staff evolved beyond the conventional grant maker role when they formed PT Partners. The partnership integrates resident leadership, cross-sector social service provision, and land use advocacy to provide PT Barnum residents with improved economic stability, health, safety, and education. The program is intended to create a community of opportunity for a group of chronically disadvantaged families living in Bridgeport, Connecticut, which has the highest level of income inequality of any metro area in the nation.

PT Partners staff supports residents in taking ownership over improving their lives and their community in the face of multiple barriers including geographic isolation, high unemployment, and poverty. Separated from the majority of Bridgeport by a major freeway, PT Barnum is adjacent to industrial land uses including a wastewater treatment facility and a

cement plant. Despite being located in one of the wealthiest counties in America, only 53 percent of PT Barnum's 350 households (1,200 individuals) have earned income. The average annual income for a family of four is just under \$15,000, and 93 percent of households are female-headed. Historically, conditions within the PT Barnum development led residents to keep to themselves, afraid to leave their homes, but by late 2015 that was beginning to change. Kate Kelly had recruited seven resident leaders who were active in the governance of PT Partners, plus approximately 15 more who participated in PT Partners gatherings as their schedules allowed.

With PT Partners, the foundation engaged these leaders and the broader PT Barnum community to define and solve the daily hardships of poverty for themselves. The approach itself emerged from a collaborative idea generation process, which was facilitated by FCCF and included several community partners, about ways to proactively reach and serve families in public housing who were at risk of eviction. In a similar spirit to those discussions, the activities of PT Partners are governed by the Governing Committee, which is comprised of PT Barnum residents, FCCF, and civic, municipal, and social service partner organizations. The Governing Committee meets monthly, decides on the strategic direction of PT Partners, and oversees implementation of all activities, including community development, social services, advocacy, policy review, and outreach. Resident leaders on the Governing Committee control 51 percent of any vote taken by the Governing Committee, which assures resident ownership and leadership of the initiative even though PT Partners typically governs by consensus. Additionally, the Executive Committee chair and any other officer positions are shared between one resident and one partner agency representative. By the end of 2015, the Governing Committee had established governance procedures, subcommittees, and working groups. The Governing Committee had also directed its attention to defining, analyzing, and creating solutions to the challenges that PT Barnum residents had identified and prioritized.

### **The PT Partners Proof of Concept**

This resident-driven approach helped to illuminate the unexpected yet fundamental challenges around limited access to healthy food. "Healthy food access was a key concern, but we couldn't figure out why," noted Cass Shaw (no relation to Shaquana Shaw), president and CEO of the Council of Churches of Greater Bridgeport. "We were focused on the wrong end of the equation. We knew that people had at least some limited choices beyond local bodegas. Stop 'n' Shop is within walking distance, though expensive, and fresh vegetables are available, though certainly costly." To determine why residents faced barriers to fresh food access, the resident leadership team and partner agencies collaboratively designed and administered a resident survey. The results demonstrated that, among other problems, there was an unanticipated concern with residents' refrigerators. Refrigerators throughout PT Barnum, even on the warmest setting, were too cold and would ruin tender produce, especially lettuce and fruit. This insight demonstrated that PT Partners' resident-centric approach

could produce more effective diagnoses of residents' daily challenges, which in turn would help PT Partners craft more effective solutions.

FCCF further affirmed the effectiveness of a grassroots-centric approach through its participation in the What Works Challenge. Organized by the Citi Foundation, the What Works Challenge was an opportunity for PIP grantees to use crowdsourcing technology to solicit and evaluate ideas from constituents. FCCF used the What Works Challenge as a platform to engage in direct dialogue with youth age 16 to 24 at PT Barnum and elsewhere in Fairfield County. The process and results of this work informed FCCF's initiative called Thrive by 25, where the foundation works directly with youth to identify, create, and implement solutions to issues affecting youth such as employment and housing. Most recently, the young leaders organized a summit with 200 youth from across Fairfield County, the outcomes of which the young organizers are using to shape upcoming roundtable discussions. The successful launch of this initiative demonstrated that foundations—not just direct service organizations—can revolutionize their work by actively engaging people at the grassroots level.

## **Balancing and Leveraging the Foundation's Role**

### *Funding*

FCCF's novel role as both funder and partner created the potential for conflicts with PT Partners' partner agencies. At the inception of PT Partners, the foundation took a lead role at the request of the collaborative because the foundation was best positioned to lead the realization of PT Partners' shared vision. In doing so, the uneven power dynamics inherent in FCCF's dual role required the foundation and the partner agencies to renegotiate their relationships with each other. This task was especially delicate because some partners were also FCCF grantees. "It is tricky to play both roles—that of a funder and of a partner. It required us to understand the roles people wanted us to play versus the roles we wanted or needed to play," said Nancy von Euler, vice president of programs at FCCF. "If you want to do this work, do it with great humility and find the delicate balance between ownership in terms of commitment, but not ownership in the sense of 'this is ours.'" Over time, according to von Euler, FCCF hopes to continue to support PT Partners with patient capital, a commitment to fundraising, and by encouraging leadership and ownership to grow within the partnership.

Progress toward these aspirations was already evident in late 2015, by which point the PT Partners collaborative had obtained grants from the Robert Wood Johnson Foundation and the ZOOM Foundation totaling into the six figures. Additionally, the entirety of PT Partners' following year of operations was funded by a mixture of funding from other sources, and FCCF was working to raise more grant capital. At the same time, PT Partners was establishing a finance and fundraising committee to enable resident and non-resident leaders to assume increased responsibility for these critical functions, thereby growing partner ownership and accountability for the sustainability of PT Partners.

### *Program Delivery and Evaluation*

At the outset of the PIP partnership, the foundation used its PIP funding to drive PT Partners' adoption of a shared approach to social service delivery. FCCF made PIP funding available for training in trauma-informed community building, which PT Partners as a group had decided was important. Trauma-informed community building is an approach to social services intended to "de-escalate chaos and stress, build social cohesion and foster community resiliency over time."<sup>1</sup> The approach called on partner agencies to develop authentic relationships with residents based on realistic expectations. Through these relationships, the usual power dynamic present in social service delivery would equilibrate and set the foundation for improved outcomes. "Trauma training is important," said Kristina Foye, program director of Child First at Bridgeport Hospital. "It helps all partners identify and acknowledge the effects of trauma and gives service partners a framework to work with residents and each other in a more effective, respectful way." Cass Shaw echoed Foye when she said that a key lesson for partner agencies is that the unequal power dynamics inherent in the relationship between service providers and their clients always affect client interactions, whether or not the service providers are conscious of them. "If you are attentive to [power dynamics], it allows you to become more compassionate and more clear about how to do this work effectively, and how to re-examine your own role and relationships with your partners."

More recently, at the suggestion of FCCF, PT Partners decided to adopt the Results Based Accountability (RBA) methodology for setting and evaluating program goals. "RBA will provide focus to service providers and an accountability structure. It will provide accountability to residents, which is unheard of," said von Euler. While implementation of RBA was in its early stages in late 2015, the trainings in RBA and trauma-informed community building had already influenced Child First to rethink its service delivery model at PT Barnum. Furthermore, the trainings helped resident and non-resident partners develop a shared language to address the challenges they are determined to solve. Said von Euler, "I wish we had introduced RBA sooner."

### *Political and Community Connections*

Furthermore, FCCF's position as a funder provided PT Partners with political connections in the wider community that created unforeseen opportunities. For instance, FCCF intervened on behalf of PT Partners when the PT Partners project director Kate Kelly discovered the City of Bridgeport's plan to install green technology to expand the wastewater treatment plant next to PT Barnum. The foundation had provided a grant for the City's green initiative, BeGreen 2020. As an informal condition of the grant, FCCF asked city officials to collaborate with the residents of PT Barnum Apartments if any work was to take place near

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1 Emily Weinstein, Jessica Wolin, and Sharon Rose. *Trauma Informed Community Building: A Model for Strengthening Community in Trauma Affected Neighborhoods*. San Francisco: BRIDGE Housing and Health Equity Institute, 2014, p. 3.

the apartment complex. When the City proceeded with plans for the treatment plant after soliciting only minimal public input, FCCF politely reminded city officials of their understanding. Representatives of PT Partners subsequently attended meetings with officials from the city and Anaergia, the company under contract for the plant expansion. Ultimately, the City agreed to provide PT Partners with a low-cost, long-term land lease to a parcel of land adjacent to both the treatment plant and PT Barnum Apartments. PT Partners plans to sublet the land to a local hydroponic farmer. The farm will, in turn, generate rental income for PT Partners, create job opportunities at the farm for residents, and increase access to local, fresh, healthy food. “This was a great partnership,” said von Euler. “Residents were very involved. They created an advocacy paper, went to all the meetings, learned about the pros and cons of the project, and sat at the same table as the city’s political leadership.”

### **Developing Resident Leadership**

Kate Kelly, who works on-site and is trained as a clinical social worker, focused on recruiting resident leaders as well as developing their leadership skills. Her efforts supported residents’ personal growth and engagement in community activism that, in turn, started to fuel further changes for individual resident leaders, the neighboring school under construction, partner nonprofit agencies, and the community at PT Barnum Apartments.

Residents’ personal growth came from what Kelly described as the “problem solving techniques, expanded friendships and connections, and feelings of relevance and empowerment” that helped resident leaders learn to trust in one another and to overcome the trauma-induced isolation that is common at PT Barnum. In 2015, resident leaders were regularly working together, speaking out in circumstances wherein previously they had been silent, and honing additional leadership skills through community meetings and activism. Outside of the regularly scheduled Governing Committee meetings, resident leaders met twice weekly together with Kelly in “community meetings” to talk about their lives and ways to improve their community. Kelly provided a flexible structure for these meetings and helped the residents problem-solve.

At a heated community meeting in October 2015, the five resident leaders who were present expressed their frustration with school officials who were not paying adequate attention to their hopes and concerns for the new Longfellow School (pre-K to 8)—subsequently renamed the Geraldine Claytor Magnet Academy—that was under construction adjacent to PT Barnum Apartments. To guide the conversation, Kelly encouraged the residents at the table to “distinguish between emotion versus facts,” both for themselves and in their conversations with officials. “You are unassailable when you use ‘I feel’ language,” she counseled. Kelly offered the residents tools to frame their grievances in a way that was grounded in their experiences—facts that could not be misunderstood, disputed, or dismissed.

As the conversation continued, one resident said that she was scared to approach a high-ranking school official about an issue that really mattered to her. Kelly asked, “What would you do to make yourself less scared in that situation?” Through continued dialogue, the

residents created options that the individual and others in the group could use to quell fear and boost confidence in similar situations. Over time, ongoing leadership development opportunities helped resident leaders—many for the first time in their lives—directly engage and remain engaged in the politics of community change.

## **Key Outcomes of Resident Leadership**

### *Personal and Political Transformation*

The resident leader Tawanda White described the community meetings as “a safe haven that teaches you how to handle life’s hurdles. PT has helped me find my voice and express myself.” When asked how she felt about being a resident leader, White declared, “I’m overwhelmed with happiness and joy.” Shaquana Shaw reinforced White’s sentiments. “PT Partners gets residents to want more for themselves and gives them a sense of personal worth.”

Within a few years, Shaw had emerged into an active community leader. She was one of the 10 PT Partners representatives on the Geraldine Claytor Magnet Academy Committee (GCMAC), which was comprised of school officials and interested community members and was established to formulate and oversee the new direction of the school. One of her greatest successes in this role was when, at her behest, GCMAC adopted the Early Language and Literacy Initiative in order to guide the pedagogy and learning outcomes at the new school. Furthermore, she had also been elected co-chair of the PT Partners Executive Committee, and she was president of the PT Barnum Apartments Resident Council, which is an official organization of PT Barnum Apartments that mediates the relationship between Bridgeport’s public housing authority and PT Barnum tenants. Shaw also found a business mentor through PT Partners, and she was scheduled to testify in the state capitol with the PT Partners-affiliated organization Mothers for Justice regarding concerns about affordable housing, domestic violence, and welfare programs. Yet, even with two children, she found the time to cater the occasional breakfast or dinner for PT Partners meetings. “Shaquana is a firecracker,” said Kelly, “who serves her community with style, elegance, and humanity.”

### *Engaging Hard-to-Reach Families*

These dramatic changes among the residents, coupled with the collaborative environment of PT Partners, inspired residents to ask for changes to the nature of the social services provided through PT Partners. The case of Child First at Bridgeport Hospital illustrates how one provider acted on that feedback. Child First provides pre- and peri-natal care to ensure family well-being and promote early childhood development. For PT Partners, Child First developed and operated a drop-in center to serve families with young children at PT Barnum Apartments’ Gary Crooks Community Center. Child First staff initially offered activities for parent-child relationship building, but attendance was near zero. Through meetings made possible by PT Partners, the resident leadership team suggested that Child First should offer yoga. Yoga would help caretakers care for themselves and meet one another. Once the yoga

workshops started, Child First saw an increase in attendance and, as a result, the organization had created a new way to connect families with its pre- and peri-natal services. “PT Partners is helping us reach families who are difficult to reach and otherwise would have fallen through the cracks,” said Kristina Foye.

Resident leaders were also instrumental in large scale community efforts, as exemplified by a summer backpack drive. The backpack drive was a three-day event intended to engage even the most difficult to reach families. Resident and non-resident leaders organized the drive and in total distributed \$10,000 worth of school supplies such as brand-name backpacks, pencils, crayons, index cards, and protractors to children at PT Barnum Apartments. On day one, volunteers from PT Partners and approximately 15 non-affiliated households at PT Barnum Apartments received and sorted the shipment of materials donated by the organization High Watermark Women. On day two, the volunteers set up an assembly line to fill the backpacks, and on day three, volunteers assembled and distributed the bags. The effort culminated with a celebration with free hamburgers and hot dogs, live music, games, and prizes. In the end, roughly 30 volunteers distributed 350 backpacks full of supplies. Prior to this event, residents rarely left their homes to participate in back-to-school drives because of tendencies to isolation and because previous events served only a limited number of families at PT Barnum. The backpack drive marked a significant departure from the status quo and helped establish a foundation for future successes in resident engagement.

## Conclusion

In PT Partners’ two years of Partners in Progress funding, the program’s resident and non-resident leaders together established a resident-led collaborative and achieved tangible successes. These achievements were a direct result of Fairfield County’s Community Foundation’s community quarterback role and the trauma-informed approach that enabled and influenced residents’ leadership. The experience of PT Partners’ implementation and management of its integrated strategy demonstrates how employing an integrated strategy provides the promise of better outcomes.

There are four general lessons for community quarterbacks:

### *Expect and respect resident leadership.*

When establishing a program with grassroots leadership, don’t define the problems and their solutions up front. Instead, set shared expectations in terms of governance, social service delivery, and outcome evaluation. Bring groups to the table and facilitate but do not direct the conversation. Unexpected problems and solutions may become apparent, as happened when PT Partners endeavored to expand access to fresh, healthy food. The resident-led survey quickly diagnosed a root cause of the problem. A conventional, top-down process would have been lengthier and costlier and still might have failed to identify poor refrigeration as a significant barrier to healthier diets.

*Effective resident leadership can be supported by careful attention to governance and a willingness to support leadership development.*

FCCF worked alongside its resident and non-resident partners to structure the governance of PT Partners to ensure that the residents would always be able to control PT Partners' mission, strategy, and implementation. The bylaws for the formal governing body, known as the Governing Committee, gave residents a 51 percent vote on all Steering Committee matters regardless of the number of resident leaders present. Additionally, the Executive Committee chair and all officer positions are shared by one resident and one partner agency representative. In its role as funder, FCCF also provided significant support for resident leadership development, both in staff time and in funding formal training.

As a result, engaged resident leaders helped to strengthen PT Partners. For example, resident leaders successfully advocated for Child First at Bridgeport Hospital to offer yoga classes, which increased regular attendance at Child First's workshops and helped connect families with Child First's array of pre- and peri-natal services. Questions to ask when evaluating the effectiveness of resident governance and leadership development might include: How are residents included in the formal rules of governance? How are residents engaging in or disengaging from governance and project planning? Are non-resident partners in the collaborative seeking out and acting on suggestions from resident leaders?

*Leverage relationships to secure patient capital.*

The structure, goals, and initiatives of an integrated strategy will evolve in the program's early years, and integrating grassroots leadership adds a new layer of complexity to this evolution. As the philanthropic equivalent to venture capital, patient grant capital is required to support the early stages of this work. FCCF's established relationships and reputation helped the foundation secure patient funding such as the PIP grant. The foundation subsequently leveraged the PIP grant to attain additional funding from sources including the ZOOM Foundation.

*Advocate for the program's interests and act on unexpected opportunities.*

PT Partners project director Kate Kelly notified PT Partners of the wastewater treatment plant expansion next to PT Barnum Apartments, and FCCF subsequently helped PT Partners bring the necessary people to the table to negotiate community benefits from the expansion. FCCF used its political traction and funding influence within the City of Bridgeport as a means to secure the interests of the PT Partners collaborative.

There are three lessons on resident leadership:

*Focus leadership development on problem-solving techniques, expanded friendships and connections, and instilling feelings of relevance and empowerment.*

At PT Partners, these trauma-informed methods have helped to recruit and retain resident leaders who were previously disengaged. One especially important resident-led victory was

when, at the behest of PT Partners, the Geraldine Claytor Magnet Academy Committee adopted the Early Language and Literacy Initiative in order to guide the pedagogy and learning outcomes at the new school. Another success was the backpack drive, where resident leaders recruited their neighbors to volunteer and participate—neighbors who otherwise might have kept to themselves and have been disconnected from the opportunities afforded by PT Partners.

*Participating in leadership roles can directly improve residents' social and emotional health.*

While advocating for changes in the nearby public school, residents developed problem solving abilities, self-confidence, and an expanded network of friends.

*The need for investment in leadership development changes over the course of implementing an integrated strategy.*

At the start of the work, leadership development is critically important. The need for investment in leadership development diminishes but does not disappear as resident leaders become more confident and skilled in the community change process, as suggested by PT Partners' progress in resident capacity building. Continued investment in leadership development is key to retaining resident leaders, and when on-boarding new leaders, program staff may need to renew their focus on resident capacity building in order to bring new leaders up to speed.

*This case study was prepared by Matthew Singh and Rachel Bluestein of the Low Income Investment Fund.*