

Investing in Resident Leadership

Understanding the Ripple Effect of Impact in South Phoenix

In 2017, Vitalyst Health Foundation supported a place-based investment in South Phoenix focusing on advancing two of its five goals: increasing the capacity and effectiveness of community-based leaders and increasing civic participation. This brief documents the investment journey and aims to begin articulating the ripple effect it had for the residents involved in the greater South Phoenix community.

Catalysts for the Investment

Investments in capacity building focus on developing skills, infrastructure, and resources. Vitalyst identified resident leaders in South Phoenix who were already working on civic participation in the context of equitable Transit-Oriented Development (TOD) as an element of a healthy community to enhance their capacity and therefore their effectiveness to make change.

In January 2016, the Phoenix City Council voted to fast track the light rail expansion project along Central Avenue into South Phoenix to open by 2023.¹ Despite the many benefits that can come with enhanced public transportation, TOD in low-income communities can often lead to transit-induced gentrification, displacing many who cannot afford the change in property values.²

Concerned about the potential transit-induced displacement as a result of the light rail expansion project, some South Phoenix residents came together to form Remain. Reclaim. Reimagine. (RRR) in mid-2016. RRR's goal was to begin the process to prevent potential displacement by promoting equitable Transit-Oriented Development. Equitable Transit Oriented Development (eTOD) is an approach to TOD that centers equity in the process by prioritizing resident inclusion so they can influence the development trajectory in their community. It involves aligning both public and private interests to promote development while also ensuring existing residents can experience the benefits.³ Vitalyst believed that by supporting the development of resident leaders, it could ultimately help them influence the TOD process in a positive way.

Underlying Assumptions

In order to understand the reasoning behind this investment, it is important to highlight the underlying assumptions that impacted the development and implementation. It is built on three fundamental frameworks:

- Acknowledgment that definition of health has been expanded beyond physical health in recent years to recognize that conditions in people's social environments impact health outcomes.⁴
- Multiple systems continuously interact and influence a person's health and ultimately the elements of a healthy community lead to a need for systems thinking when tackling health challenges.⁵
- Civic participation is an effective strategy to influence systems change in order to promote effective regulation and policies for health issues.⁶

Adaptive Theory of Change

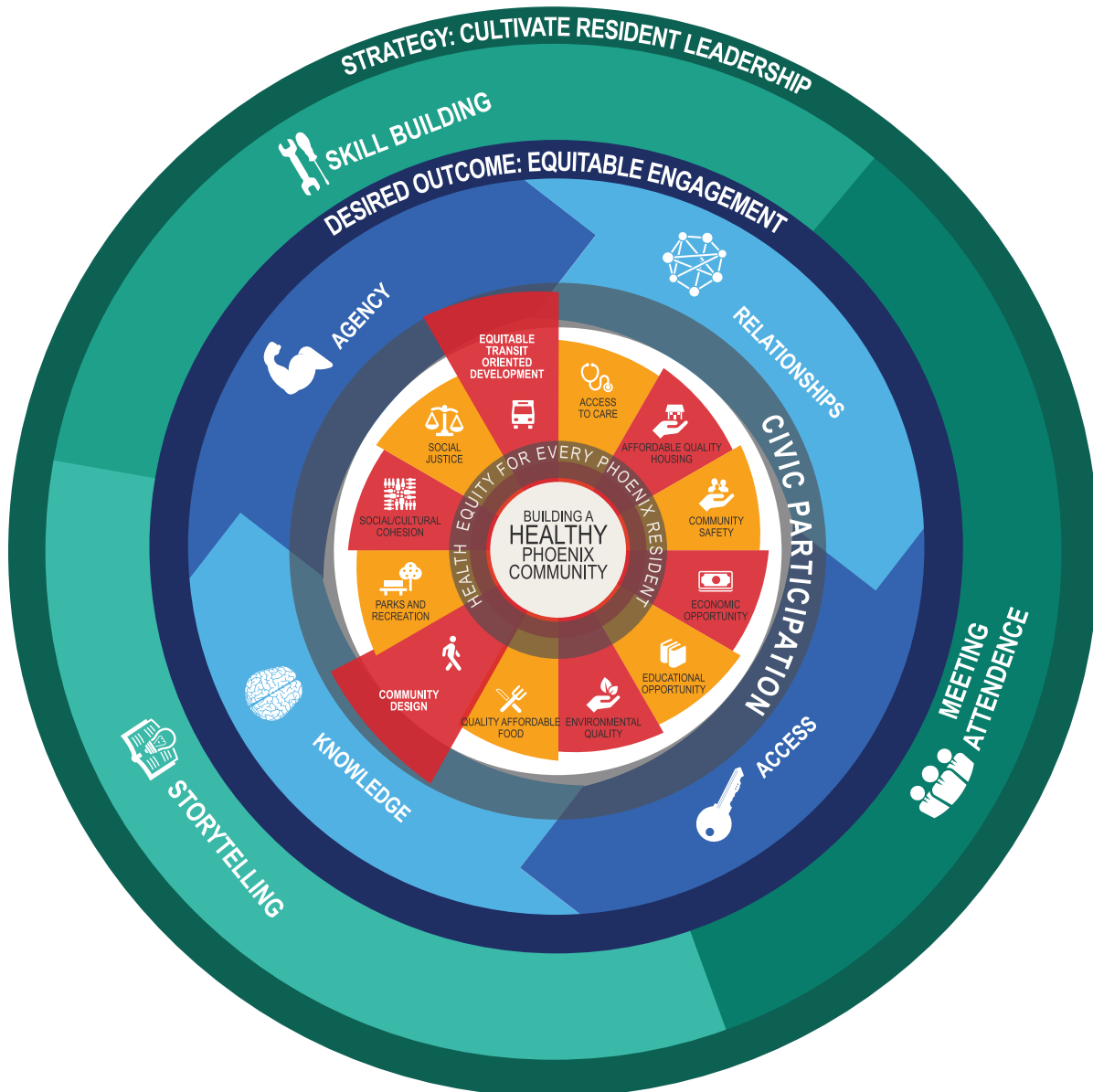
Figure 1 represents a post-investment understanding of the complexity of the investment related to results, strategy, outcomes, and an increase in civic participation.

Investment Result: An Equitable Transit-Oriented Development process in South Phoenix through the cultivation of civic participation in the community with resident leaders.

Strategy: Cultivate resident leadership in the context of civic participation and capacity building.

Outcome: When residents have more relationships, greater access, increased knowledge and a sense of agency to change, this can ultimately lead to equitable engagement.

FIGURE 1 Adaptive Theory of Change



Civic Participation

Cultivating civic participation among those who are closest to the social issue is one critical systems solution that focuses on supporting the skills of resident leaders to better their community through understanding and interacting with government systems.

Investing in civic participation can ultimately influence any element of a healthy community because civic participation offers a core set of skills to impact any type of policy. For a community to be truly healthy, multiple levers of change must be pulled simultaneously and strategically.

Understanding Investment Impact

This investment took into consideration the complexity of the issue and sought an innovative approach that was more systems-oriented. As a result, the project utilized a framework of evaluation that addressed complexity. Evaluating complexity is about tracking multiple components and utilizing emergent metrics that are unknown at the beginning and develop unpredictably. We utilized the Developmental Evaluation⁷ approach to guide capturing feedback throughout the investment period and a Diarist to document changes in real-time.

Diarist Work

The Diarist Project from the Annie E. Casey Foundation inspired Vitalyst's experimentation with the role of a Diarist. A Diarist is someone who participates in an active process of documenting initiative progress, while also providing feedback to participants as a way to reflect and ultimately influence the trajectory of the work.⁸

The Diarist attended the majority of the group meetings and documented notes as a form of data collection for future analysis. She met with resident leaders individually throughout the initiative, providing them an opportunity to reflect and recognize any insights gained that would ultimately influence the work. She also served as the evaluator at the conclusion of the investment to articulate the social impact from an inside perspective.



History of Environmental Racism

It is important to note, that South Phoenix has experienced a history of environmental racism since the 1890's. It has been well-documented that early development of the Phoenix area segregated South Phoenix as the place for Latinos and Blacks to live. They were not given adequate housing, investments and in fact hazardous waste sites were intentionally planned for this area, away from the more valued parts of the city where whites lived.⁹

As a result of this history, South Phoenix residents experience several health issues, including limited access to healthcare, exposure to air pollutants as a result of the hazardous waste sites and food deserts. It is important to note this point because many residents have historical knowledge within their families of these occurrences; and as a result, have a high level of mistrust of government. Increasing civic participation provides an opportunity for better options and to address these systemic issues.

Journey of Capacity Building and Civic Participation

RRR Journey

The RRR Road Map in Figure 2 on the following page provides a high-level overview of monthly activities before, during, and after the investment period. It highlights how an investment of leadership can influence multiple projects. It also provides a structured way of understanding how projects evolve past the formal time boundaries of the investment and the importance of allowing space for emergent practices to develop.

“IN A HEALTHY COMMUNITY, RESIDENTS TAKE AN ACTIVE ROLE. CIVIC ENGAGEMENT CREATES HEALTHIER COMMUNITIES BY DEVELOPING THE KNOWLEDGE AND SKILLS TO IMPROVE QUALITY OF LIFE. VOTING AND VOLUNTEERING ARE AMONG THE MANY MEASURES OF AN ENGAGED POPULATION. IN BOTH CASES, PEOPLE’S ACTIONS SHOW THEY CARE ABOUT THE OUTCOMES OF THEIR COMMUNITY OR THEIR NATION, AND THEY WANT TO CULTIVATE POSITIVE CHANGE.”

*Building a Culture of Health,
Robert Wood Johnson Foundation*

Phase 1: Orienting to Resident Leadership (July–September 2016)

The early months of RRR involved a core group of residents recognizing a need to come together and support eTOD with the upcoming light rail expansion into South Phoenix. Initial meetings involved developing leadership skills through understanding the history of South Phoenix and their narrative, along with attending municipal meetings for the first time. It also included establishing the core infrastructure of the group.

Phase 2: Building Capacity (October–December 2016)

This phase involved building the capacity of RRR as a community group. Further development of leadership skills among the core resident leaders, expanding the network and identifying ways to spread awareness of light rail development. Vitalyst provided seed funding to support this phase of growth.

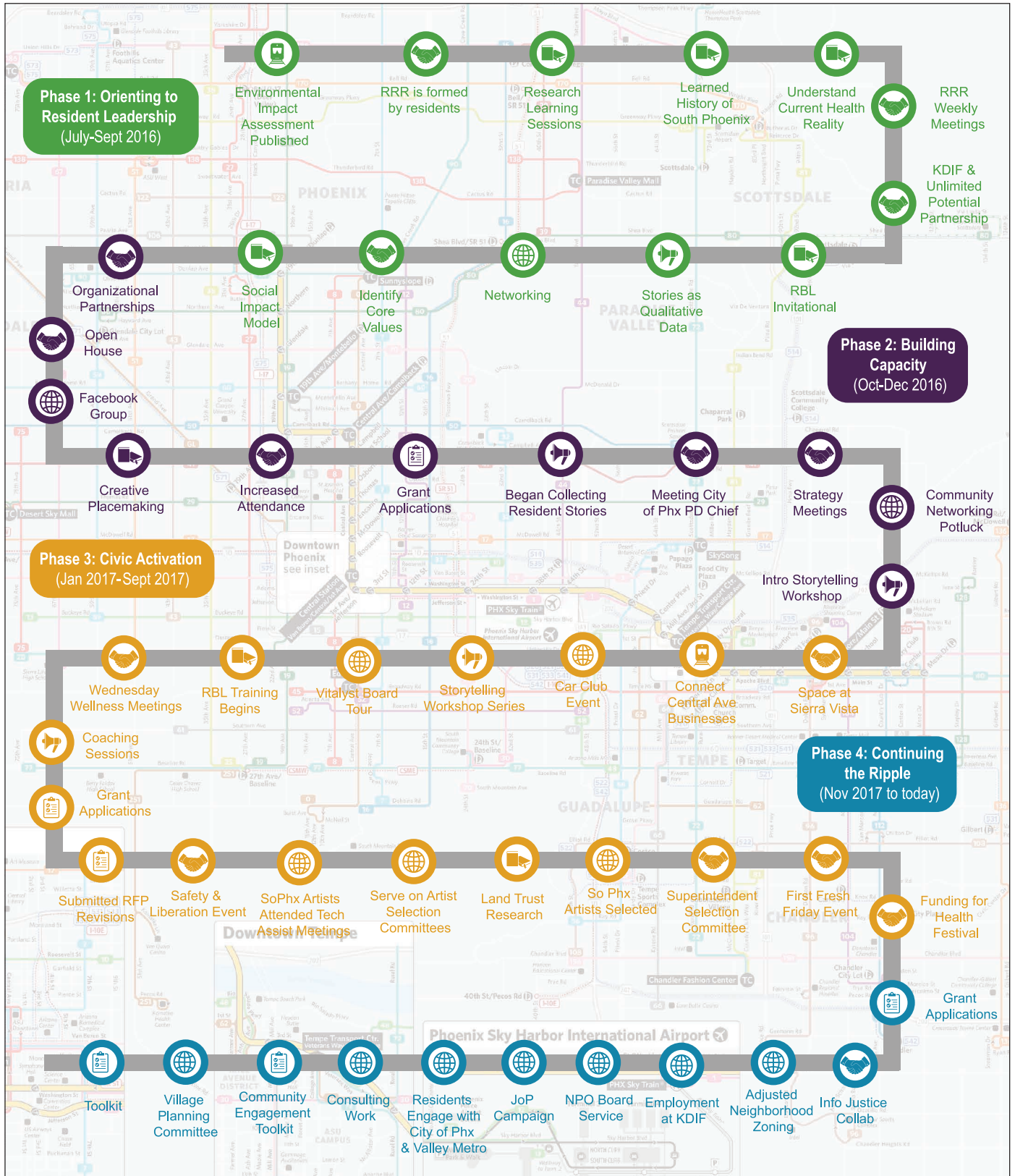
Phase 3: Civic Activation (January 2017–September 2017)

After establishing a core group of leaders and developing leadership skills, RRR focused its efforts on civic participation related to community development issues including small businesses, informing residents of light rail development and supporting resident health. Through a partnership with RRR, Unlimited Potential received a \$125,000 grant to expand RRR’s impact.

Phase 4: Continuing the Ripple (November 2017 to present)

Although the Civic Participation investment officially ended in 2017, projects, actions, and initiatives continue to happen as a result of the social capital developed during phases 1-3. Social capital included connections made with other residents, social sector leaders, governmental leaders as well as the leadership skills developed such as grant writing, storytelling, and understanding city government.

FIGURE 2 Remain, Reclaim, Reimagine. Road Map



What was Accomplished: Seeds of Systems Change

The RRR journey cultivated many changes as a result of the investment in leadership skills. Although the group began as a result of the light rail extension project, it manifested several outcomes beyond engagement in eTOD specific changes. This section outlines the outcomes related to the activities on this journey.

eTOD Specific Impacts

The central project for RRR was to influence the TOD process with the City of Phoenix and Valley Metro. There were several ways that resident leaders got engaged directly in equitably influencing TOD efforts.

- **Identifying Equitable Engagement.** The resident leaders worked together to not only connect to their community, but also to define the characteristics of equitable engagement. Here are the key points within their definition:
 - Equitable engagement is inclusive;
 - Work is led by people most impacted;
 - People who are experiencing oppression co-create solutions with extended communities;
 - It accounts for history and power; and
 - It's an ongoing practice and continual process.
- **Community Engagement Request For Proposal (RFP) Changes.** In May 2017, RRR proposed changes to the light

rail community engagement RFP, including extending the deadline for more people to have an opportunity to apply, looking into more technical assistance with businesses, and adding a requirement to conduct a feasibility study of a land trust or land bank in the central corridor.

- **Arts Selection Committees.** Several residents in RRR were able to get involved in selecting the art that would be placed along the light rail line. They were able to influence the process to ensure that some local South Phoenix artists could have their work featured.
- **Strategic Partnerships.** Resident leaders made strategic partnerships with organizations that were involved in the TOD process such as Local Initiatives Support Corporation and Local First Arizona. These partnerships eventually led to these organizations approaching their work differently by centering equity and working towards it.
- **Valley Metro Public Involvement Plan Changes.** In November 2017, Vitalyst submitted a Community Engagement Toolkit to the City of Phoenix staff, highlighting resident perspectives connected to best practices around the country. Eventually Valley Metro began incorporating the new ideas from the resident leaders into their public involvement plan and the City of Phoenix is using the Toolkit.



- **City of Phoenix Staff Training in Equity.** Resident leaders often connected with City of Phoenix staff in the Planning and Development Department to learn more about their plans and make recommendations to improve their practices. Conversations with City officials eventually led to the City conducting an equity training to enhance its involvement in an Equity Fellowship.
- **Village Planning Committee.** Following the investment period, one member of the group joined the Village Planning Committee, which will lead to adding conversations about equity at that level and may influence how the committee approaches its role.

Increase in Civic Participation Beyond eTOD

In addition to the civic participation related to eTOD, resident leaders engaged in other ways since the involvement in RRR provided a system understanding that goes beyond any one issue.

- **New Precinct Commander.** During the initial months of RRR's development, a resident leader had a close friend who experienced a difficult police encounter. As a leadership group centered on civic engagement, this led to community efforts to change the precinct commander in one of the South Phoenix precincts to hopefully prevent these types of encounters in the future.
- **Superintendent Selection Committee.** Some residents got involved in the Roosevelt School District Superintendent selection process to ensure the school board chose the best candidate for students in South Phoenix.
- **Neighborhood Zoning Change.** One resident leader attended a zoning hearing for the first time after learning how to navigate the city processes through RRR. He was able to prevent a zoning change in his neighborhood that would have negatively affected his neighbors.
- **Campaign for Justice of the Peace.** Another resident got more involved in a campaign to support a local grassroots leader becoming Justice of the Peace. Regardless if they win or not, the act of running for office has engaged individuals in the election process for the first time. If they do win, this important role can ultimately influence how South Phoenix residents can navigate the justice system.

- **Active on Nonprofit Boards.** Several residents joined nonprofit boards as a result of their networking and skill building that supports them to be in positions of greater influence.

Increase in Community Building

RRR hosted and supported several community events throughout its time relevant to South Phoenix residents while also offering a way to connect and learn more about RRR and the work related to eTOD to get more people engaged. Here are a few to note:

- **Strategy Open House for RRR.** RRR hosted an open house to share its overall strategy and efforts to support the community, particularly around development issues such as eTOD.
- **Facebook Group.** There has been an active RRR Facebook since October 2016. It currently hosts over 350 members. Regular posts continue to present day and provide an opportunity for residents to connect, stay updated about their community, and receive information on ways they can get involved.
- **Holiday Potluck.** December 2016, RRR hosted a holiday potluck where more than 30 organizers and leaders attended to connect and plan for the next year.
- **Car Club Event.** In December 2016, RRR supported a car club event at South Mountain Cafe. This helped to engage residents in a cultural activity in the community.
- **Safety and Liberation Event.** In August 2017, RRR participated in a community safety and liberation event to connect with residents and hear each other's stories.
- **Fresh Friday.** In September 2017, RRR hosted a community event at Sierra Vista Elementary School called Fresh Friday, which provided a venue for local artists to display their work and residents to come together.

Increase in Leadership Skills

As a result of activities resident leaders participated in, there were several notable leadership skills developed through their involvement with RRR that each resident leader will carry with them for the rest of their lives.

“ONCE SOCIAL CHANGE BEGINS,
IT CANNOT BE REVERSED.
YOU CANNOT UNEDUCATE
THE PERSON WHO HAS
LEARNED TO READ. YOU
CANNOT HUMILIATE THE
PERSON WHO FEELS PRIDE.
YOU CANNOT OPPRESS THE
PEOPLE WHO ARE NOT
AFRAID ANYMORE.”

Cesar Chavez,

*Address to the Commonwealth Club
in San Francisco, November 9, 1984*

- **Navigating Municipal Government.** One of the primary skills emphasized within RRR was how to work with the City of Phoenix. Resident leaders learned this by attending various city meetings, connecting with city staff, and learning about how things operate.
- **Community-Based Participatory Action Research (CBPAR).** Early on, resident leaders received introductory training on CBPAR.¹⁰ CBPAR highlights the importance of a collaborative research process to collect data in unique ways and ensure no voices are missing.
- **Storytelling.** Resident leaders participated in 20 hours of storytelling training over a two-month period early in 2017. The goal was to provide them with storytelling tools and experiences necessary to tell their own stories and to engage members of the South Phoenix community most at-risk for displacement from light rail development.
- **Grant Writing.** Some resident leaders participated in grant writing to receive additional funding on projects such as a community health festival, a leadership fellowship and arts-based community building.
- **Results Count.** From February to December 2017, resident leaders participated in the year-long Results Count training, providing them with skills related to identifying a result, performance measures, and strategies to enhance their work.¹¹
- **Strategic Partnership Building.** Resident leaders engaged in building strategic partnerships with those impacted by the light rail expansion as well as those who may influence South Phoenix in general. These partnerships included small businesses along Central Avenue, other grassroots groups, and networking with decision makers such as Sheriff Paul Penzone, Phoenix Police Chief Jeri Williams, former City Councilwoman Kate Gallego, State Senator Catherine Miranda, and many others.
- **Communication Skills.** RRR partnered with community radio station KDIF 102.9 in marketing for several community events, which eventually led to some resident leaders getting involved and learning recording skills.
- **Greater Awareness around Health and Wellness.** Another area that influenced the resident leaders was the emphasis that the eTOD project had in the context of building a healthier community. This theme was present throughout all of the work and some resident leaders even got involved in a health and wellness group featuring yoga and general wellness practices.

Increase in Social Capital

A person's network and connections to neighbors, leaders, and organizations influence someone's ability to thrive. Social capital is important for both individuals and communities. An article published in the *National Civic Review* emphasizes that social capital is "important in determining a community's ability to advance the health and well-being of residents, respond effectively to natural disasters, and plan for the opportunities and challenges that will present themselves in the future."¹² A case study of one resident leader showed an increase in his network by over 60 people and organizations. This network included small businesses in South Phoenix, grassroots leaders, residents, and nonprofit organizations. These relationships eventually led to employment, leadership opportunities, and even support in navigating City of Phoenix zoning in his neighborhood.

FIGURE 3 Social Capital Network Map



Looking Forward: Learning and Opportunities Ahead

The Ripple Effect

A person can see ripples develop when someone drops a stone in water, but often doesn't know the impact of the ripples. Similarly, it's important to emphasize that investments in capacity building have impacts beyond the investment period. When leaders enhance their knowledge, skills, and networks, they have built stronger social capital that they carry with them throughout their lives. This increase in social capital ultimately impacts the community, because leaders can be more effective in their work to address a variety of issues now and in the future.

The Continuing Journey

Although there were many impacts related to the investment, it was very challenging to catalogue them all. There were several factors to take into account that served as learning opportunities and lessons for the future. Here are some of the key takeaways from a funder's perspective:

- **Relationships are Key.** Through this investment, we recognized that community work moves at the speed of trust. Building trust can only happen through relationship building that requires communication, connection, and being open to changes based on the collaborative nature of the work.

- **Supporting Resident Leaders Requires Adaptability and Nonlinear Thinking.** Grantmakers must be open to changes in the work, deadline adjustments, and other flexibility to accommodate the lives of resident leaders and the complexity of this work. An emergent approach is open to trial and error, and does not emphasize a linear process for project implementation.
- **Capacity Building and Civic Participation Investments Require Years of Funding.** Although this investment supported a lot of activities that led to changes in individual leaders as well as the community, it was small compared to what is needed for true systems change.
- **Measuring Impact of Capacity Building and Civic Participation Requires Non-Traditional Evaluation Methods.** Unlike program investments, investing in capacity building and civic participation is nonlinear and does not have a clear cause and effect path to track. Thus, a Diarist who served as an informal qualitative researcher to document the change process over time served to be most effective for this type of investment. A Developmental Evaluation framework was also particularly useful.



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