

A SEAT AT *THE TABLE*

*How resident leaders from two Indianapolis neighborhoods helped shape decisions about the future of **Making Connections** in this city*



By being a big part of the process for choosing an entity to manage Making Connections in the future, a group of Indianapolis residents transformed the way many people perceived the work of this long-term change initiative...as well as the roles residents can and should play in changing their neighborhoods.



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The residents came powerful. We owe that to *Making Connections*.
They gave us training. They supported us.”

—Peggy Storey

—BY WILL FAY AND KAREN RUPRECHT

In September 2006, a group of about 30 residents and institutional partners gathered for the second meeting of a group convened to explore ways to sustain the work of *Making Connections* Indianapolis. The immediate task was to begin discussing a key part of the initiative’s sustainability strategy—transitioning day-to-day management of *Making Connections* from a site team of consultants to a local entity that would be supported by residents and other partners.

Yet midway through the meeting, a question surfaced that went far beyond what a “Local Management Entity” would look like. The question helped focus a diverse and influential group—including the Central Indiana Community Foundation (CICF),

United Way of Central Indiana, Lilly Endowment, the Mayor’s office, Fairbanks Foundation and others—on a much more important issue: What *Making Connections* Indianapolis is really trying to sustain.

“Why are we talking ‘how’ to move forward?” asked a leader of one of the city’s major institutions. “Shouldn’t it be ‘if’ we move forward?”

The question was not mean spirited, said Rosemary Dorsa, the chief operating officer for CICF. “He was saying, ‘Wait a minute.’ He wanted to tease out an answer about whether we were clear we wanted to go forward with this work, and he put it out there. And people kind of stopped and thought, ‘We don’t have to do this.’ And in that moment of reflection, people realized this is a decision we get to make”

Calling this question provoked what many involved in the process would later describe as a turning point in Indianapolis’ sustainability planning. For the answer about whether to continue this approach to improving the lives and life chances of children and families in two of the city’s toughest neighborhoods—Martindale Brightwood and Southeast—didn’t come from the representatives of the Casey Foundation, local foundations or influential funders. Instead it came from the people who live, work and worship in these two communities.

Jim Mulholland, a resident leader from Southeast, was clear in his response to the question about moving forward: “The question is not whether we’re going to do this work, but whether you’re going to do this with us.”

“That just gave us confidence,” said Elaine Cates, also a resident leader from Southeast. “I don’t think he realized saying that would have so much

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“I don’t think that everybody from the funding community had a good grasp of how far along those residents had come. I know I didn’t. And how strong they were and how willing they were to keep this going.”

—Betsy Bikoff



Shirley Webster, Elaine Cates, Julie Barrett and Peggy Storey were four of the residents who caused funders and other partners to “kind of change their thinking and sense of respect,” in Webster’s words.

impact, but I was like, ‘Yeah! We’ve been doing the work, and we’ll keep on doing it.’”

Peggy Storey, Cates’ counterpart in Martindale Brightwood and a long-time leader of that neighborhood, said the message from residents could not

have been clearer. “It is not ‘if’ we are going to do it, it is ‘how’ are we going to do it. The residents came powerful. We owe that to *Making Connections*. They gave us training. They supported us.”

What is *Making Connections*?

Making Connections is a long-term effort in 10 cities to pull residents and institutions together to improve the lives of families living in specific low-income neighborhoods. Established in 1999, this initiative is supported by the Annie E. Casey Foundation along with many local funders.

This report looks at what can happen when resident leaders have an authentic seat at a high-stakes decision-making table—in this case one to recommend a Local Management Entity (LME) for *Making Connections* Indianapolis.

This story is not about how and why the Central Indiana Community Foundation was ultimately selected as the LME. Instead, the focus is on the reflections of people involved in this process about what it takes to set, step up to and stay at a table where the seats for residents are real and influential.

“We had been talking to all those partners about results, closing the gap, data, residents and place-based, and they all said, ‘Yeah, yeah, we get it.’ But it was not until we came to the table with residents as full partners that other folks had an appreciation for what *Making Connections* really means.”

—Donna Stark

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Setting the Table

Putting a resident-centered transition process in motion

For most of 2006, *Making Connections* Site Team Leader Donna Stark and Site Coordinator Lena Hackett met with local partners to signal the Casey Foundation’s intent to transition site management to a local organization during the next 18 months.

The foundation’s rationale was that a local entity, supported by strong partners and with the capacity and commitment to achieve the initiative’s results, was the best bet for sustaining this work long-term. Said Stark, the Casey Foundation’s Director of Leadership Development.

“We had individual meetings with local partners where we said, ‘Here is our point of view, our aspirations and our non-negotiables,’ including a commitment to results, using data to assure accountability, and powerful roles for residents in the work. At the same time, we met with residents. We wanted to know what they wanted out of the conversation. They were the first folks we asked, ‘Who do you want to be in charge? Which organizations are compatible with your interests?’”

The task of deciding who would be invited to participate in the process was difficult, given the large number of organizations and people *Making Connections* has worked with in the city since it began at the start of the decade. Yet making those choices also helped clarify what the process was about, Stark said.

“We may have hurt people’s feelings, but we made the decision about who to invite into the pro-

Julie Barrett, past president of the Greater Citizens Coalition of Martindale Brightwood (GCCMB), serves on the neighborhood’s Local Learning Partnership (LLP) and Family Investment Collaborative (FIC). Barrett also is a workforce recruitment and retention specialist for the community.

Elaine Cates, founder and president of the Fountain Area Community Team, a Southeast neighborhood association, chairs the Southeast LLP and serves as a workforce specialist at Southeast Community Services.

Jane Mullikin, a new resident in the Southeast community, is a community organizer in Southeast and serves on the neighborhood’s LLP.

Jim Mulholland, a long-time resident of the Southeast neighborhood, chairs the Southeast workforce development task force.

Peggy Storey, a long-time resident leader of Martindale Brightwood, chairs the neighborhood’s LLP and is a past vice president of the GCCMB.

Shirley Webster, a life-long resident of Martindale Brightwood, serves as president of the GCCMB and chairs the neighborhood Family Investment Collaborative.

“I am more of a choir director now than someone who actually runs the meeting. I mostly say, ‘Who is going to lead the next part?’ Residents now lead the conversation as much as they sit at the table.”

—Lena Hackett

cess in terms of who really cares, who is willing to put resources on the table, who is willing to be an authentic partner at the table.”

The sustainability workgroup included six residents representing the two *Making Connections* neighborhoods (see page 4).

This group demonstrates a high level of leadership skill and a unique, passionate commitment to the work and their communities, said Hackett. All but one are also part of the Casey Foundation’s Resident Leadership Network, which convenes resident leaders from across the *Making Connections* sites to share their experiences and challenges.

Stark stressed that the voices of these resident leaders were invaluable during the sustainability workgroup meetings because they made real the “non-negotiables” around data, accountability and resident leadership.

“We had been talking to all those partners about results, closing the gap, data, residents and place-based, and they all said, ‘Yeah, yeah, we get it,’” said Stark. *“But it was not until we came to the table with residents as full partners that other folks had an appreciation for what Making Connections really means.”*

Preparing residents for a central role in the transition process

Intensive preparation sessions conducted by Hackett with residents before and after each of the sustainability workgroup meetings were crucial to ensuring that their voices were influential and authentic, a point made by several residents.



Former Indianapolis *Making Connections* Site Coordinator **Lena Hackett** says that, “We would have a conversation about the fact that they know this work on such a more intimate level than many of the partners in the room.”

During the prep sessions, residents reviewed the agenda, talked about outcomes they wanted from the meeting, anticipated questions and answers, and discussed the perspectives and viewpoints of other participants, many of whom knew little about the breadth and depth of the initiative’s work.

Doing this helped affirm residents as experts about *Making Connections*, said Hackett. “We would have a conversation about the fact that they know this work on such a more intimate level than many of the partners in the room.” In addition, the debriefings helped residents unpack what was discussed during the meetings.

“A lot of it is just helping residents know who is in the room. We do a debriefing and we ask, ‘Who said something you really thought was odd? Who sounded like they were really on target?’

“All the hard stuff is worked out in the design team meetings. We talk about stuff we want to work through. We talk about what we’re going to bring up and how certain people might say things and how we’re going to weave it to make sure everyone’s needs are met.”

—Julie Barrett

Where do you think we might have to do some work in terms of educating someone deeper?”

While the first three meetings of partners, funders and residents were facilitated by Hackett and Stark, residents eventually took over that role. *“I am more of a choir director now than someone who actually runs the meeting,”* Hackett said. *“I mostly say, ‘Who is going to lead the next part?’ Residents now lead the conversation as much as they sit at the table.”*

In addition to these prep sessions, residents led a “design team” that set the agenda for the larger meetings. Being part of this design team was very helpful, according to Julie Barrett, a resident leader from Martindale Brightwood.

“All the hard stuff is worked out in the design team meetings. It’s background work before the meeting. We talk about stuff we want to work

through. We basically do the work and take it back to the big group. We talk about what we’re going to bring up and how certain people might say things and how we’re going to weave it to make sure everyone’s needs are met.... We may need three design team meetings until we have enough stuff to bring to the table.... We really utilize those RLF principles.”

RLF stands for Resident Leadership and Facilitation, a training process that resident leaders said helped them play a central role in the LME selection process (see page 7).

Storey also spoke about the importance of being part of this design team: *“We had small design meetings among ourselves before we even talked to the funders. We decided beforehand what we wanted from them. We asked them to step forward. We told them we would choose them, not that they would choose us.”*

Residents often met among themselves to plan upcoming meetings as well as debrief previous meetings of the whole transition group.



“When you have a person there that wants to come with a gripe or is angry, it shows you how to deal with that person and still let them know they are important. That is a hard thing to do when people feel they are not heard.”

—Peggy Storey

Resident Leader Facilitation Training

Resident leaders credited Resident Leadership Facilitation training (RLF) as key to helping them play a central role in the LME selection process. *“If there was ever a time you were going to use it [RLF skills], you were going to use it there, at the LME table,”* said resident Julie Barrett. *“Boy, you’re going to practice it there.”*

Launched in Indianapolis in 2003 by the Foundation’s Leadership Development unit—which Indianapolis Site Team Leader Donna Stark leads—RLF now is a staple of resident engagement and leadership efforts in the 10 *Making Connections* sites.

RLF training helps teach residents how to reflect individually and collectively about the changes they want to see in their own neighborhoods and how to surmount long-standing barriers to change. The training focuses on results, conflict resolution, data use and strategic planning, the goal being to move a neighborhood agenda forward with a full range of partners and stakeholders.

RLF was one of the most helpful things that *Making Connections* brought to Martindale Brightwood, said Peggy Storey.

“It opens people up. You learn new ways to listen, new ways to think about what someone is saying ... to guide meetings, keep them on point.”



Donna Stark, the Casey Foundation’s Director of Leadership Development (on the left, with Martindale Brightwood resident Janice Looper), said that “it was not until we came to the table with residents as full partners that other folks had an appreciation for what *Making Connections* really means.”

“When you have a person there that wants to come with a gripe or is angry, it shows you how to deal with that person and still let them know they are important. That is a hard thing to do when people feel they are not heard and that people do not care about them. It teaches you techniques...that are very useful dealing with residents in the community.”

(Continued on next page)

“You sit down and do what you need to do, but know you need to measure work and be result-oriented. We were not strong in that at all. We would set out and say we wanted results, but being able to document it, we did not have that.”

—Shirley Webster

Resident Leader Facilitation Training

In addition to those skills, RLF also helped her change her own way of thinking, Storey stressed.

“Even if you think you are there for the community, it makes you have to step back and think—do I have an agenda? What about funders? It takes a certain type of person to sit at a table. You have to sit there and listen and decide what your part is going to be and make this work.”

“You have to take the training just to get yourself in a frame of mind about what your part is going to be. You don’t vent. You try to prove to them that this is an important way of doing things. This is a new way of doing things and it works. And the only way you can prove that is to be an example. So you come to the table fully informed because you have been trained, you know about Making Connections and how it works.”

“So when you come to table, it is like coming to the table fully armed, but you do not necessarily have to shout, you just negotiate. You just prove to folks that it works with the data, your information, the way you have been informed, the way you tell them what is going on in your community that has come about because Making Connections is a part of it.”

Shirley Webster also thinks that RLF training has had a big impact:

“If I had that kind of training 20 years ago and had some community members who had that 20 years ago, how much further ahead we would have been and how different we would have done things. With RLF, you learn how to conduct yourself, how to sit in and lead a meeting.”

“And then you couple that with the tools. The communication tools—learning how to frame your neighborhood messages, the tools about learning how to use data, when you couple that with resident leadership, you create someone who can lead in a positive way.”

“Actually being able to be result-oriented. You sit down and do what you need to do, but know you need to measure work and be result-oriented. We were not strong in that at all. We would set out and say we wanted results, but being able to document it, being able to show what we have done, we did not have that. Most of it was day-to-day and then we would go home and relax.”

“I am not sure it is great for the folks that taught us these things ... because now we are in their face. It gave us confidence.”

“There was dead silence at the first meeting. It was the worst meeting in the world in terms of trying to get folks engaged. One of the funders at first said he could not say what he wanted to say if residents were there, but now he’s changed.”

—Lena Hackett

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Stepping Up to the Table

The impact of strong residents in the LME process

Residents were determined to fashion a local entity that would advance the values and mission of *Making Connections*.

One of the design team’s first decisions was to not try to start a new organization to become the LME, an option that was on the table at the start of the discussions. “We wanted to use someone who already had some knowledge of funding,” explained Storey.

Over time two options emerged, Storey says: the Local Initiatives Support Corporation and the Central Indiana Community Foundation, a local funder. “Each has come to our meetings and they presented how they work, and how what we want fits into what they do.”

Ultimately the transition group chose CICF, in part because the residents felt that it understood the need to work with residents and was committed to doing so. “We have gotten a long way because we have chosen the funder we thought was best,” Storey said. “And that has proven to be true.”

The group also made a series of important decisions about the governance of *Making Connections*. A board would be created to oversee the *Making Connections* work that would include four residents from each of the two target neighborhoods (out of a total of 16 members). This board will help insure that residents would continue to have seats at the

Making Connections table and that residents and other partners would continue to work together.

But perhaps the biggest impact of the residents being at the transition table was on the attitudes of the non-residents. Sitting at a decision-making table where residents are full partners was a relatively new concept for many of the institutional and funding partners participating in the LME selection process, and there was some initial discomfort.

“There was dead silence at the first meeting,” Hackett recalled. “It was the worst meeting in the world in terms of trying to get folks engaged. One of the funders at first said he could not say what he wanted to say if residents were there, but now he’s changed.”

Residents were also uneasy at the initial meetings, in part because they were keenly aware of the power imbalances that money can create. Recalled Webster:

“It was very uncomfortable at the first meeting. Funders walk into the room like they own it, because they usually do. You know that money is power. Let’s face it—if you’re empowered, you have money.

“So it is difficult when residents sit at the table with all the money. Usually, they sit with us because we don’t have money. So when residents

“They asked us questions and they were surprised at our response and at our empowerment. The ones representing our neighborhoods at the table were not intimidated, nor afraid to say what we thought.”

—Shirley Webster

come to the table, you are usually the least empowered.

“But after meeting one, the funders were uncomfortable, because knew they had to change the way they did business.... Most funders do not sit down with residents and say, ‘Let’s work together.’ We learned to look at both sides.”

Throughout the process, residents began to feel more comfortable interacting with and advising the institutional partners, said Cates.

“That first day when we were all sitting at the table with all of those people—it was like we were way out of our league. But every time we’ve had a meeting, it’s like people are more comfortable. And after the third or fourth meeting, one of the guys from the Lilly Foundation actually cornered me in the parking lot and asked my opinion on something.”

Webster had a similar experience:

“When we first came to the [sustainability] table, they were rather kind of cold and reluctant. But because we had folks at the table not afraid to speak, they kind of changed their thinking and sense of respect.”

“If I walk into a room with funders,” Webster continued, “there is that sense of empowerment to them.” But this attitude changed “once they found out we had become empowered.

“They asked us questions and they were surprised at our response and at our empowerment. The ones representing our neighborhoods at the table were not intimidated, nor afraid to say what

we thought or what our experience had been with Making Connections. It surprised them and kind of took the wind out of their sails. It was like, ‘OK, we are not that important.’

“We came to a respect. The residents gained a respect from the funders at that table. Because normally funders do not have that kind of respect.”

“We’re becoming visible,” added Barrett. “We’re not invisible anymore. As we started talking, they [institutional partners] were seeing the value in residents.” She noticed that people were listening to the residents. “And knowing that you’re being listened to is an honorable thing.”

Indeed, institutional partners and funders *“have been knocked over by the residents,”* Hackett says.

“For some of them, this is as much direct contact with residents as they have ever had. For them, they knew one or two key neighborhood residents, but have not been exposed to residents who have been this engaged in guiding such a significant piece of work for their communities.

“And the fact that the residents are so well practiced in their leadership skills...they went through all this and RLF, so they have great facilitation skills. They are so wise and so on point. So folks have been bowled over by that, and have voiced that to them.”

Although some partners questioned whether residents should be in the room making decisions about the LME, most now

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The new *Making Connections* Indianapolis board

The board that will oversee the work will eventually have 16 members, with four coming from each of the two *Making Connections* neighborhoods (Southeast and Martindale Brightwood).

Name	Title	Organization	Mentor
Pearl Carter	President	Hillside Neighborhood Association	Jerry Keys (SE resident)
Rosemary Dorsa	Chief Operating Officer	Central Indiana Community Foundation	Mark Stewart (Exec Dir of Southeast Neighborhood Development)
Jay Geshay	Senior VP, Community Planning and Strategic Initiatives	United Way of Central Indiana	Becky Besser (SE resident)
Mike Halstead		Halstead Architects	Elizabeth Gore (MB resident)
Melina Kennedy	Partner	Baker & Daniels LLP	Julie Barrett (MB resident)
Angela Klitzsch	Program Associate	The Clowes Fund, Inc.	Elaine Cates (SE resident)
Linda Minter	Outreach Coordinator	Greater Citizens Coalition of Martindale Brightwood (GCCMB)	Karen Kouwe (Southeast Community Services)
Jim Mulholland	President	Bates Hendricks Neighborhood Association	Charles Tony Knight (MB resident)
Elizabeth Odle	Principal	Washington Irving IPS School #14	Peggy Storey (MB resident)
Jennifer Rice	Board Member	Fletcher Place Neighborhood Association	Aurelia Noel (MB resident)
Donna Stark	Director of Leadership Development	Annie E. Casey Foundation	
Michael Twyman	Director of Grant Programs	Nina Mason Pulliam Charitable Trust	Allison Luthe (former MC staff)
Shirley Webster	President	GCCMB	Elizabeth Ryan (SE resident)

have found it integral to the process, said Tony Macklin, associate vice president for development at CICF and an early champion of *Making Connections*.

“It was not whether or not residents should be there, but how should they be there. That they were willing to step up and do that was great for us, but it also impressed the other folks at the table. It was

“Not only have residents been doing all the work behind the scenes, but they are very informed and understand that they are linchpins to move this forward once Casey steps back. The residents clearly own this process.”

—Betsy Bikoff



CIOF's **Tony Macklin** said that the residents' willingness to express their views “impressed the other folks at the table” and “gave all of us pause to check our own assumptions.”

the first time they experienced resident leadership first-hand, and that set the stage from the first time we met. It gave them enough confidence to feel that ‘People will listen to us,’ and it gave all of us pause to check our own assumptions.”

The fact that institutional partners were side-by-side with residents who were not only committed to the work but also insistent on results and fluent in data was a tipping point, said Betsy Bikoff, another early supporter of the initiative who is the Fairbanks Foundation's vice president and chief grant-making officer.

“It changed the dynamic in a significant way. I don't think that everybody from the funding community had a good grasp of how far along those residents had come. I know I didn't. And how strong they were and how willing they were to keep this going and how vested in the ownership they were in Making Connections in their community. And I hadn't seen that in the past in such an organized fashion. I think the inclusion of residents is what turned the table.”

Bikoff said the process has made clear that the success of the LME hinges on residents continuing to play leadership roles in the work.

“Not only have residents been doing all the work behind the scenes, but they are very informed and understand that they are linchpins to move this forward once Casey steps back. They have been a key component. The residents clearly own this process, especially the way they want to configure the governance board for the Local Management Entity. I don't see them fading away at all. In fact, I think it would fail if they faded away at all.”

Residents clarify a new way of working

Among other things, having residents at the table helped clarify and advance a place-based, resident-centered, data-driven way to work toward better outcomes for children and families living in tough neighborhoods.

Dorsa said *Making Connections'* heavy emphasis on using data to inform decision making and strategy development—an

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—Rosemary Dorsa

emphasis that the residents communicated clearly during the transition meetings—represents a significant departure from business as usual among local funders.

“With Making Connections, the data savvy part really does stand out. That is really amazing. I want a primer on how you use data in decision-making. I want to see Casey’s work influence our board on how it makes decisions.”

Having residents at the center of the LME discussions and the Making Connections work has helped the partners and residents achieve clarity about complicated work, added Macklin.

“Having thoughtful leaders on the planning group and the larger transition group has been amazing. I don’t think we would have seen that thoughtful of leadership five or 10 years ago. Or it might have been thoughtful, but not expressed in a way that pulled people together in a productive way.”

More than anything else, having residents deeply engaged in this process helped the non-resident partners “get” this way of work, according to Webster. *“It has made a dent in their understanding of residents and how it can work better if residents are involved.”*

Stark heard that understanding during one of the transition meetings when the senior vice president for CICF said, *“This notion of residents engaged and focusing on results and place-based strategies is how we should do all our work in this city, and this group of folks needs to lead that work.”*

“Those are the moments that make my heart soar.” Stark added. “To take that breath and say, ‘Gosh. This is going to work.’”

The transition process showed people what can happen when residents are able to hold local funders accountable for the way they do their work. Stark recalled an early meeting of the sustainability work group:

“All of a sudden the head of LISC is on the hot seat, because he is being asked about how residents are participating, and about results. We are raising the bar on what is expected for everyone...and it is a public conversation.”

Resident Jim Mulholland agrees that having residents at the table helps raise the bar. *“When you’re doing work in the neighborhood, residents have a very strong feeling about the work. We have a high expectation....”* He adds that residents have an especially high expectation about the role that the new Making Connections board will play.

But many people made the point that Indianapolis’ acceptance and understanding of the roles residents can play is still at an early stage. Webster says that, *“They have not really applied it. There have only been the two Making Connections neighborhoods that have been subject to resident involvement.”*

Another key outcome of Making Connections’ transition/sustainability process was the development of a “crosswalk” that showed whether and how other local initiatives are similar in mission, theory and aspiration to Making Connections.

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—Tony Macklin

The initial question was whether *Making Connections* had a unique approach, one that needed to be sustained. To answer this question, the transition group examined several other local initiatives that have been started by LISC, CICF and the city.

In doing this it became clear that many of these recent initiatives have been



“It’s comfortable to know that I can sit at a table and open my mouth and be heard. There’s a value in that and it challenges me to do better,” says **Julie Barrett**.

increasingly informed by the work of *Making Connections*. For example, LISC joined with the city government last year to launch the Great Indy Neighborhoods Initiative (GINI), which promotes a comprehensive approach to healthy communities. GINI is incorporating emerging lessons from *Making Connections* around resident engagement and using data to measure impact in its six target neighborhoods, including Southeast.

CICF has been a strong supporter of *Making Connections* since the initiative started in Indianapolis six years ago, and many aspects of its work were influenced by *Making Connections*, according to Macklin. The community foundation was an early champion of “Family Circles,” one of the initiative’s first resident engagement strategies. In addition, CICF was a co-founder of the Family Strengthening Coalition, a broad-based group of government and service systems, residents, businesses, and faith- and community-based organizations. The Coalition helps raise awareness about events and activities that help families connect to support, resources and opportunities. Both the Coalition and Family Circles are key parts of CICF’s Family Success Initiative, which works to create a broad base of support for a family-strengthening agenda in the city, which again is a central goal of *Making Connections*.

Monty Hulse, who helped coordinate the transition of *Making Connections* Indianapolis to an LME, worked with LISC and CICF on the crosswalk. The crosswalk underscored that *Making Connections*’ hard focus on improving results for children and families in specific neighborhoods is unique and will

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—Ellen Quigley

be hard for other initiatives to replicate, said Hulse, who is the former director of the Indianapolis Neighborhoods Resource Center (INRC) and the United Way’s Bridges to Success program.

But the crosswalk also “surfaced strong commonalities and possible replications—such as how to put an RBA (Result-Based Accountability) frame in place, and help residents use data,” said Hulse. “This is setting up some knowledge transfer to GINI [Greater Indy Neighborhoods Initiative].”

Indeed, Macklin said the transition process for *Making Connections* is happening at a time in the city where the focus on strong resident roles, results and data can help shape emerging community change initiatives in Indianapolis.

“We’re in an interesting time in the city, where you have a number of place-based initiatives going on, backed up by LISC and INRC, in addition to Casey. So one reason the transition is going well is the luck of timing, the subtle influence that is popping at the right places at the right time.

“The mayor is paying attention to neighborhood development, the CDCs are giving more attention to LISC, and there is a bolder stance by CICF on place-based issues. All of us are going in the same direction on resident-driven, family-based, place-based.

“*Making Connections Indianapolis* may evolve into something [much bigger] over the next three years.”

Former Indianapolis Deputy Mayor Ellen Quigley, who was part of the LME transition process, believes that the “values and spirit” of *Making Connections* have begun to permeate how the city and other partners work to improve outcomes for vulnerable families.

She says that *Making Connections* has come to represent “the importance of resident voice and place-based development,” along with the need to strongly support families and children. “The idea that strong kids equal strong families and neighborhood, and that you have to support the communities that families live in, and strengthen economic opportunities and educational opportunities of children.”

Quigley added those values are becoming second nature for the city and other partners.

“It’s something we take for granted now, sort of like diversity—we don’t talk about it—we just do it. It is part of everyone’s job. That shift takes place over time, even within a single person. People talk about family-strengthening today and still ask, ‘What does that mean?’ But once you understand and see the logic in it, see the data and how it can work, then it becomes natural.”

“When we come up to those moments of differing perspective, what happens?
I guarantee you, if the funders on the board try to pull rank,
the residents will very quickly leave.”

—Jim Mulholland

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Staying at the Table

Sustaining Resident Leadership in Making Connections Indianapolis

To make sure that residents stay at the center of *Making Connections* in Indianapolis, the new governance board will include eight residents, four from each neighborhood (see list on page 11).

Resident Jim Mulholland said that the residents have very high “expectations of what the board members should be about...” A big part of their role, says Mulholland, will be to make sure that *Making Connections* continues to have strong resident influence. “When we come up to those moments of differing perspective, what happens? I guarantee you, if the funders on the board try to pull rank, the residents will very quickly leave.”

Residents are prepared to “hold the stake” for assuring that they have an authentic say on decisions, said Webster. “My great concern is once we set this in place, it will become something other than resident driven. We need input with power and impact on decisions.”

Some residents say that the power of any board comes from its ability to influence budgets. “We need to share the administrative side of things more,” says Mullikin. “We are at a point now where we need to know more than five line items [in the budget].

“There is all this talk about stuff in different buckets. Bring me a line item [budget]. What is



Elaine Cates says residents initially felt “out of their league,” but “every meeting people became more comfortable.”

the budget? We need to know at the beginning of this serious, getting-it-done phase which buckets are too tight and which ones aren’t.”

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—Shirley Webster

The board will also require its members to work closely with a “mentor” as a way of connecting non-residents to *Making Connections*’ neighborhoods and residents to non-resident board members.

“What we have talked about is to have each board member have a mentor,” explains Dorsa. The resident mentors will help the non-resident members understand resident values.

“The way we want to structure this is an expectation: between meetings they will get together with mentors. The mentor role is to accompany them to community meetings. They will meet you there, sit with you, and encourage you to participate in things at the neighborhood level.”

Dorsa says this will “ensure experiential learning” for the eight non-resident members. “We need to do things that make them connect. We want folks inclined to do that, but unless you make that part of the deal, you can have good intentions but then get too busy.”

Deepening the Pool of Resident Leaders

One of the primary challenges surfaced throughout the LME designation process was the need to develop a deeper pool of skilled and dedicated neighborhood leaders who can advocate effectively for this way of work. “The challenge [for *Making Connections*] will be engaging other residents who aren’t around the table,” said LISC’s Taft. “I’m not sure how deep



Shirley Webster (far left) says that when the other partners asked residents questions, “They were surprised by our response and our empowerment.”

“The challenge will be engaging other residents who aren’t around the table. I’m not sure how deep the pool is and how ready other residents are to step into that role.”

—Bill Taft

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“We have a great group of residents at the transition table, but we have to make sure another group surrounds them as the next generation,” Macklin said. “There is no specific example, but once you get dug into this, it is easy to overly own the next pieces going forward. They are heavily invested, so how soon will they give up a seat to someone new in Martindale Brightwood?”

Many of the resident leaders involved in the LME recommendation process have worked for years with *Making Connections* in addition to their long-standing roles in neighborhood associations and other community groups. The issue of burnout is thus a real challenge. Said Webster:

“The biggest problem has been the necessity to do so much. Even in the neighborhoods, we are taking a look at that, stepping up membership drives, because even in doing the ordinary things, too many people are doing too much and too many are doing nothing. That is the piece we need to work on.”

Although there is recognition that new resident leadership needs to be infused into *Making Connections*, the current leaders still find it difficult to pull back. Asked how she avoids burn out, Storey replied:

*“I do not think I have **not** gotten burned out. I tried to step out of the [Greater Citizens Coalition of Martindale Brightwood] for about a year and it ended up that I was right back. There was no one else to step up to that. You do not*

want to say ‘what the heck’ with this. It is hard to get people to take these seats because of what is required.”

There are efforts to nurture new leadership in the initiative neighborhoods. In the past year, *Making Connections* has trained residents to facilitate the RLF trainings and are now able to schedule training as the need arises.

Making Connections has also collaborated with the Neighborhood Alliance for Child Safety (NACS) to launch the Neighborhood Partners program, modeled after the Walkers and Talkers and Trusted Advocates resident leadership and organizing models in other *Making Connections* sites. The Neighborhood Partners are responsible for connecting residents of *Making Connections*’ two neighborhoods to resources and information. Many of them have participated in the RLF trainings and have become even more involved in their communities.

A related issue is compensation for resident leaders. To avoid any appearance of conflict of interest, residents who receive annual income in excess of \$5000 from *Making Connections* are not eligible to sit on the board. In addition, people whose jobs are more than 50 percent funded by a grant from *Making Connections* may not serve on the board.

To some of the long-time resident leaders interviewed, that doesn’t make sense given the effort required, the expertise residents bring to the table, and the fact that other partners are

“I tried to step out for about a year and it ended up that I was right back. There was no one else to step up to that. It is hard to get people to take these seats because of what is required.”

—Peggy Storey

indirectly compensated because board service is part of their job. Said Webster:

“It has become a job to sit at the tables. It has become a job. I tell my neighbors who do some of the work that it becomes crazy when I work harder than the people who are salaried. It gets topsy-turvy. When someone tells me how valuable I am... you cannot say that and then tell me my time is not worth anything. If you value me, value me. If you don't, I will know that by the way you treat me. You have made me knowledgeable, and that is worth something.”

This could mean that the residents on the governance body for *Making Connections* Indianapolis will lack the expertise of long-time leaders such as Storey. She said this rule will be “hard” because they will need “to bring on new people.”

Having new residents will be challenging, she thinks, because the new governance board will be going through a period of working out the “kinks” to “make sure the board is set up right” and functions smoothly.

“It will be hard to find someone committed like that. Board members will be green as grass when they get ready to go on this board. They will not know a blasted thing.”

Webster also was not comfortable with the no-stipends policy:

“If I find someone to step up, I am not sure I would be comfortable saying to do it when I have been the only one in the room who is not on a salary. The other people put this down at five and



CICF's **Rosemary Dorsa** says that, with *Making Connections*, “The data savvy part really stands out. That is really amazing.... I want to see Casey's work influence our board on how it makes decisions.”

go home. So don't tell me you are not getting paid to come here.

“I am a volunteer, but these committees get to be a job. They have developed into something. This has become a lot more than a neighborhood organization. It is not just neighborhood organizing any more. It has evolved into something else and I am not sure what you call it. I could call it a business.”

“I am a volunteer, but these committees get to be a job. This has become a lot more than a neighborhood organization. It has evolved into something else.”

—Shirley Webster

While the restrictions on compensation have only ruled out four experienced leaders, it has been a priority to develop strategies to not lose their wisdom. One idea is a formal mentoring process for new resident leaders and institutional representatives on the board who need to be brought up to speed. “I think

there needs to be a transition period where the old timers might hold their hands for six months and have conversations before and after the meetings to tell them this is why this happened,” Cates says. “You just can’t stick somebody in there [who doesn’t] have a true understanding of things.”

“You have to be flexible, you have to have thick skin, you cannot be explosive.
You have to control your feelings and thinking.”

—Peggy Storey

4

What can other sites learn from the transition in Indianapolis?

The residents and institutional partners were asked what advice they would give to their peers in other *Making Connections* sites about what it takes to develop and maintain this kind of table.

Perhaps the most important piece of advice has already been discussed: the need to do a lot to prepare residents to be equal partners at tables where there will be people from funders and other institutions. Macklin thinks that the Casey Foundation itself has been “*much more strategic about growing leadership development skills*” in the residents involved in *Making Connections*. He thinks that the foundation’s investment in training residents in Resident Leadership Facilitation and in the use of data through *Making Connections’* Local Learning Partnerships made a huge difference.

Several residents talked about the usefulness of RLF training (see page 7), urging residents to take advantage of these training and learning opportunities. Storey also emphasized the need for residents to choose the pieces of the work on which they can be the most effective and the need to develop their ability to listen and respond to others with empathy.

“You need to know what your interest is, and you need to be committed. You have to know you cannot change the world. You cannot come in thinking, ‘I am going to change all these things.’

You need to know what you really want from it. What do you really want to see? What is most important to you?

“I could not be effective in every part of what it takes a community to run. I can be there to support it. So you take on what is most important to you, and support others....”

Storey also thinks that getting training “*in how to deal with people*” is critical.

“You have to be flexible, you have to have thick skin, you cannot be explosive. You have to control your feelings and thinking.... To a young person, I would say, ‘Take advantage of the training that comes with it.’”

Getting training in how to work with people “*is not just important with the community work, but also important in your home,*” Storey believes.

“I have learned how to get my point over without making my husband angry. And it is important in church work. There are a lot of benefits they can get from getting involved, more than you would think. Once you learn it, it becomes a part of you.”

Jane Mullikin, a resident leader in Southeast, believes the key is that you “*have a vision, a purpose, a love that is bigger than you.*” Mullikin says she could move to Florida to be with her daughter, but she can’t. “*I have to stay.*

“This is not just about a source of funds.... It is also about a body of knowledge, a set of practices and a set of relationships that have to be held in trust and nurtured.”

—Monty Hulse

Jim Mulholland says the process took a long time because, “The challenge wasn’t making the decisions, but getting people comfortable with each other. Everyone was nervous about everything at the start.”



There has to be something of that inside a person. I feel that is there in a lot of the people I am working with. That is a great big starting point.”

Other people’s advice focused on managing a transition process like this one. CICF’s Dorsa noted that the early decision to have someone devoted to planning the transition process was critical, not only for day-to-day operations, but also for assuring that residents are on equal footing with the other partners at tables large and small.

“Monty’s role is very important. He staffed the design group, did the notes, prepared the agenda, materials, maps of the work. That has been so important, to have someone devoted to all the

things, set the context, send the emails, make the calls.”

Hulse said the job of keeping the information flowing within and outside of the transition process is both massive and complex. The key was not just focusing on the members of the transition group but other staff, consultants, partners and residents who are also part of *Making Connections*.

“The nature of Making Connections is changing—it is becoming a local initiative that the community has to hold in trust, and the culture and values of Making Connections have been identified and we all have to be clear on that.

“This is not just about a source of funds.... It is also about a body of knowledge, a set of

*“Spend as much time as possible on behind-the-scenes conversations, not to circumvent the process, but to meet folks where they are. You have to make sure they have a full understanding of *Making Connections*.”*

—Tony Macklin

practices and a set of relationships that have to be held in trust and nurtured.”

Informal, one-on-one communication is just as important as communicating to groups of people, Macklin says.

*“Spend as much time as possible on behind-the-scenes conversations, not to circumvent the process, but to meet folks where they are, residents and others. You have to make sure they have a full understanding of *Making Connections* and what it means to transition over the next three years. No one knows the whole elephant.”*

He said this education needs to be done individually. *“It’s old-fashioned retail politics, but it takes a lot of time.”*

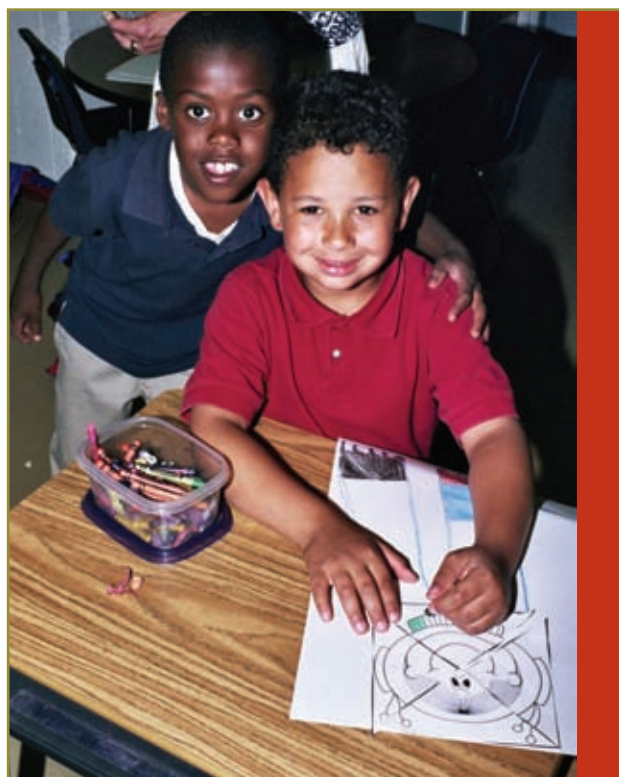
Residents and institutional partners alike said the time that this process has taken is frustrating, but that time is a big part of what it took to assure a real seat at the table for residents. Jim Mulholland, a resident leader from Southeast, explained this:

“It’s been a slow process. But, looking back, it probably couldn’t have happened any faster. The challenge wasn’t making the decisions, but getting people comfortable with each other. Everyone was nervous about everything at the start.

“The first time we said that half of the board should be residents, the funders were visibly anxious. However, when they saw residents engage and lead the design team, they realized what might be possible.

“We kept talking and what seemed radical in the beginning seemed acceptable after six months and exciting after a year. I think if we or the foundation had tried to push for decisions quicker, we would have failed. It took almost two years from when the first discussions began.

“If another city is starting from scratch, they need to know that this process takes time. It may be that Indianapolis can give other cities some tools, but I don’t think having the tools is the greatest challenge. It’s getting people comfortable.”



*Making Connections’ early education work “has really taken off,” says Shirley Webster. “We have a new school and the principal and *Making Connections* are working closely together.”*

“We kept talking and what seemed radical in the beginning seemed acceptable after six months and exciting after a year. I think if we had tried to push for decisions quicker, we would have failed.”

—Jim Mulholland

The Diarist Project

This is one of a series of publications about the Annie E. Casey Foundation’s *Making Connections* Initiative put together by The Diarist Project. The project is a new approach the foundation is using to learn from its efforts to strengthen families and transform struggling neighborhoods.

Diarists work to capture strategies and insights of the people who are leading the neighborhood transformation work. In *Making Connections*, the diarist works closely with the staff people who lead the work in each city, the Site Team Leader and Local Site Coordinator.

This story was written by Will Fay and Karen Ruprecht, the *Making Connections* Indianapolis diarists. It was edited by Tim Saasta, diarist coordinator. *Published March 2008.*

Making Connections is a Casey Foundation initiative to support work that demonstrates the simple premise that kids thrive when their families are strong and their communities supportive. What began in 1999 as a demonstration project in selected neighborhoods in 22 cities is now an intricate network of people and groups committed to making strong families and neighborhoods their highest priorities.

The **Annie E. Casey Foundation** (AECF.org) works to build better futures for disadvantaged children and their families in the United States. Its primary mission is to foster public policies, human service reforms and community supports that more effectively meet the needs of today’s vulnerable children and families.



Julie Barrett

Photos by Mary Ann Dolcemascolo (1, 4, 6, 7, 14, 17, 23, 24), John Gentry (1, 3, 12, 16, 19), and Karen Ruprecht (1, 22).

For more information about **The Diarist Project**, contact Tim Saasta at Tim@CharityChoices.com.

Diarist publication are available at: www.DiaristProject.org.

Making Connections Indianapolis focuses on strengthening families in two neighborhoods—one predominantly African-American, the other white and Latino—through a range of strategies. Local partners—resident leaders, the Central Indiana Community Foundation, United Way of Central Indiana, faith-based groups, city government and schools—are working together to close persistent gaps in employment, assets, reading scores and other indicators of child and family well-being between these two neighborhoods (Southeast and Martindale Brightwood) and the surrounding areas. For more information:

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