



PARTNERS IN PROGRESS

CASE STUDY

CASA



capital for healthy
families & communities

Citi Foundation



About the Partners in Progress Initiative



Partners in Progress (PIP) is an initiative created by the Citi Foundation in partnership with the Low Income Investment Fund (LIIF) to advance economic progress in low-income communities. It's on the leading edge of a movement to tackle big, complicated urban challenges in cities across America.

PIP builds on the concept of the "community quarterback," which is a trusted local organization that aligns objectives, resources, and efforts among stakeholders to create strong, resilient neighborhoods and paths to economic opportunity. The "community quarterback" model, introduced in the book *Investing in What Works for America's Communities*, is based on the knowledge that partners focused on solving complex problems in an intentional, coordinated way can produce remarkable results.

Since 2014, the Citi Foundation has invested more than \$5 million in PIP, benefitting 14 grantees in 10 cities across the country. As quarterbacks, these grantees are developing and expanding local cross-sector networks that connect efforts to improve places- for example, housing, transportation, and community safety-to opportunities for people-such as jobs, childhood development, educational opportunities, health care, and other services.

In 2014, PIP community quarterbacks convened coalitions of city leaders, local nonprofits, businesses, and community residents to develop shared agendas for creating economic opportunity. In 2015, they will continue leading these coalitions and implementing plans that create progress for their communities, making local urban transformation efforts more efficient and effective.

PIP projects are some of the most promising examples of community development efforts occurring around the country today. They are tackling challenges ranging from engaging hospitals, the city, and community organizations to improve health outcomes in Oakland, California, to uniting city officials, employers, and the community around jobs in Brooklyn, New York, to promoting transit as a hub for health, housing, and economic development in Dallas, Texas.

About CASA



CASA is a national leader in innovations for immigrant-focused services and collective impact involving community-based organizations, government agencies, and private partners. CASA provides a range of direct services focused on economic empowerment, financial independence, and social, linguistic and political integration, coupled with a community organizing and advocacy program which enables low-income immigrants to challenge the systems that prevent them from achieving economic and social well-being.

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As a member of CASA's staff translated, Lidia Rivas described her bewilderment when she arrived in this country from Guatemala six years ago. "I had no friends or family. A lot of neighbors were afraid to open their doors; afraid the government would take away their kids."

Rivas lives in Langley Park, Maryland, an unincorporated neighborhood on the western edge of Prince George's County just outside the District of Columbia. Between eighty to ninety percent of its 18,000 residents are immigrants, overwhelmingly from Central America, representing over 45 countries and speaking over 25 languages. Almost three of every four residents speak a language other than English at home and more than half of adults living in Langley Park never attended high school.

CASA provides a wide range of services to Langley Park residents. When Rivas, who earned a modest living doing cleaning, began to have "a lot of issues and problems," people suggested she contact CASA. She began to attend CASA's activities on weekends. "I would ask CASA staff questions and they would come and visit." Among other things, CASA worked with Rivas and other tenants to deal with their landlord about his failure to properly maintain the buildings.

CASA is over thirty years old and serves as a leader in addressing difficult and complicated issues, and bringing together community members and public, private and nonprofit partners. It advocates on behalf of, and provided a growing list of services to, a membership of over 68,000 individuals living throughout the state of Maryland. Recently it even established an office in Virginia. And it has become increasingly active as a voice in the national debate about immigration policy.

In November, 2013, CASA was awarded a grant from the Partners in Progress (PIP) Initiative, a national program funded by the Citi Foundation and managed by LIIF. The PIP funding was designed to enable CASA to build a cross-silo collaborative, to work with these partners to develop a shared vision of lasting improvements for the residents of the Langley Park community and, during 2014 to work together to create a plan that combined people- and place-based strategies and identify resources to support the resulting multi-year blueprint.

LANGLEY PARK

To really appreciate CASA's approach and strategies, it's important to understand the Langley Park neighborhood. Community development organizations typically serve urban neighborhoods that have grown organically over long periods of time. Their built environments reflect a succession of architectural styles and an intermingling of building types and uses.

Langley Park is different. While it sits within the Capitol Beltway and just three miles from the District of Columbia, in most respects it is suburban. Residents live in a community of 2, 3 and 4-story low-rise garden apartment complexes build over just 15 years following World War II. Before being subdivided, the land was part of the 540 acre Langley Park estate. Today, it is like a walled village: an uninterrupted landscape of multifamily apartment buildings, cut off from its surroundings by major arterial roads, the backyards of single family homes, and the blank cinderblock wall of the outward-facing Langley Park Plaza strip mall along the heavily-trafficked intersection of two six-lane state highways, New Hampshire Avenue NE and University Boulevard E.

On a hill at the center of the former estate sits the McCormick-Goodhart Mansion, a Georgian Revival style structure built in 1924. After the owners subdivided and sold-off the land, the mansion became a seminary, then a Montessori school before standing vacant for almost two decades. CASA acquired

and renovated the mansion in 2010, establishing it as the organization's new headquarters. It is physically, and in most other respects, the center of the community.

Relocation of its administrative offices and some of its services to the mansion prompted CASA to see itself and the Langley Park community differently. Zorayda Moreira-Smith, CASA's senior manager for place-based initiatives and community development, observed that "our new building has become a community hub." Being in the community "has allowed us to engage in real conversations with residents and physically it has made us an anchor organization." CASA could not address all the community needs. "There were gaps." CASA recognized that the Langley Park community needed a comprehensive place-based approach and that CASA needed partners to supplement its activities. The organization's strategic plan completed a year after the move acknowledged these insights: It describes the Langley Park neighborhood as "the ideal location to create a comprehensive, place-based model of community-based transformation." CASA felt the obligation to serve as an institutional anchor tasked with attracting the resources and partners that could meet those needs. Without using the term, CASA had adopted the framework of being a community development quarterback.

DEVELOPING THE PIP COLLABORATIVE

CASA's work in developing its cross-sector, cross-silo collaborative began well in advance of the PIP grant. Embracing the functions of what is now being referred to as a community development quarterback, CASA marshaled resources and mobilized a group of partners to help prepare an application for the US Department of Education's Promise Neighborhoods program. Promise Neighborhoods' locally-led, community-focused and comprehensive services approach to improving educational outcomes in high-poverty neighborhoods afforded CASA the opportunity to bring partners together around a coherent place-based effort to address the neighborhood's poverty, language barriers, lack of health services, low-performing schools, lack of early education, youth violence and high dropout rates. This framework began to change CASA's work in Langley Park. "The place-based focus has helped us coordinate our work better," observed George Escobar, CASA's director of health and human services. In addition, he continued, "the reality of Promise Neighborhood is that it has focused us on leveraging existing resources to achieve outcomes."

CASA applied for a Promise Neighborhood planning grant and just days before Christmas 2012 it received word that it was one of ten awardees. Based on two previous Promise Neighborhood funding rounds, CASA assumed only six months to land an implementation grant for the following year.

CASA branded its Promise Neighborhood, *SOMOS* (Spanish for "we are") *Langley Park*. To move forward in a way that engaged partners in the planning, built commitment to working together, and reached an agreement on an implementation proposal in six months, *SOMOS Langley Park* formed a governing steering committee on which every partner sits. They organized four "Design Working Groups" to carry out day-to-day planning and later to implement each strategic initiative. These inter-organizational teams focused on health access; workforce and economic development, housing and community development, and education. One unique structural feature of *SOMOS Langley Park's* four Design Working Groups is that each has co-chairs – a practitioner from one of the partner organizations with relevant content expertise and a Langley Park resident leader with knowledge of the community.

ENGAGING RESIDENTS

Each PIP grantee has had to adopt a way to engage neighborhood residents in setting the strategic direction, planning and governing the collaborative's work. The co-chair structure naturally occurred in Langley Park because in 2010 CASA became a membership organization. This had been one goal it set for itself when it adopted its previous strategic plan. As part of this transition, CASA also recognized it needed to elicit "authentic voices in leadership," according to Jenny Freedman, the organization's senior director of development and finance. CASA amended its by-laws and set aside four board seats for members of the community. To ensure equal participation, every board meeting includes simultaneous English and Spanish translation. Resident engagement is "core to all our work," according to Moreira-Smith. "That is why we are a membership organization. It is important that Langley Park residents join CASA and have a voice in our work. We don't want our community to think of us as a charity. It is a partnership. We are open to their feedback. From any planning process to service delivery to the board of directors we have community input."

CASA's membership was one of the key resources that it brought to the partnership's work. CASA is first and foremost a grassroots advocacy organization, and membership is a power-building tool. Since becoming a membership organization over 68,000 people have paid the \$25 annual fee to become members. That membership base gives CASA political clout it would not otherwise have.

Membership reflects a strategic shift in the way CASA relates to residents of the community. Today resident engagement is woven into everything the organization does. It is a shift that surfaces in almost every conversation with the organization's staff. As one senior staff explained, "disrespecting a community member will get you fired right away." When the Urban Institute conducted its Promise Neighborhood needs assessment as part of the planning grant, in addition to quantitative data analysis, its researchers conducted numerous focus groups with residents recruited by trusted members of the community who receive stipends from CASA to serve as outreach workers. When the researchers completed their work CASA organized a "share-back" with the community conducted entirely in Spanish. "We did a data walk," explained the Urban Institute's Molly Scott. "We posted the data on the wall and literally walked around and facilitate a sense-making discussion: 'Are you surprised by this or not? Participation looked low in this month; do you know why?'"

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PIP GRANT ACTIVITIES

The Promise Neighborhood planning grant inspired CASA to pull together a cross-silo collaborative. But ironically, one of the biggest challenges CASA faced in its capacity at the very beginning of the PIP grant period was Congress' failure to fund a third round of Promise Neighborhood implementation grants. Receipt of the planning grant had encouraged many organizations to join the collaborative with CASA. They anticipated that Federal implementation funds, along with matching grants, would generate tens of millions of dollars and the expectation that a broad cross-sector partnership could have a profound impact on conditions in Langley Park and the opportunities available to young children growing up there. Without other resources of that scale, the steering committee seemed less relevant and some partners dropped away to focus on other priorities.

CASA addressed this challenge by postponing further Steering Committee meetings. Instead CASA concentrated its efforts on maintaining the Design Working Groups' momentum. Relying on existing or newly identified resources the Design Working Groups began to implement elements of the SO-MOS Langley Park strategy.

For example, the housing and community development team working on the goal of making Langley Park a vibrant neighborhood where families are engaged, took advantage of CASA's community organizing and advocacy to strengthen the Fair Development Coalition. The state of Maryland planned to build a 16-mile light rail line. The Purple Line route would replace the median strip along University Boulevard, which is Langley Park's southwest boundary. CASA favors construction because, among other things, it will improve access to jobs for area residents. However, the transit line will likely raise property values leading to displacement of residents and immigrant-owned small businesses on the south side of University. It also anticipates both positive and negative construction period impacts including safety concerns, employment opportunities and disruptive effects on small businesses. The design team coalesced around the Fair Development Coalition to negotiate a Purple Line Community Compact with state and local government officials. CASA eventually enlisted 40 partners in the campaign. One of the unique assets at CASA's disposal is its membership base – thousands of members of the community who will be directly impacted by the Purple Line's construction. It organized rallies and workshops for residents and hundreds of them signed a petition. Although CASA was close to an agreement with the state that included a housing trust fund – Maryland's newly elected governor has indicated he wants to scrap the Purple Line. So the battle continues.

In the Learning Together design, resident engagement is built on the peer-to-peer "promodores" model.

Similarly, the education design team continues to work on a new bilingual community high school in Langley Park with comprehensive wrap-around services, such as afterschool programming, that CASA and its partners will deliver. The education design team also supported CASA's application to



the US Department of Education's Investing in Innovation Fund (i3). One of the most important findings of the Promise Neighborhood needs assessment is that Langley Park children enter elementary school inadequately prepared. Despite making progress, when they reach middle school Langley Park students encounter a "cliff." The Urban Institute team found high levels of "disconnected youth; not working and 39% not in school." Family economic pressures contribute to the high dropout and low graduation rates. "Because so many parents are undocumented," Urban Institute's Scott explains, "they are not connected to the safety net. They are also transnational, supporting families in both countries. So there is an economic need and pressure for children to become adults...There is an economic rationality to having kids leave school and work." Except, many dropouts cannot find work. CASA sees this as a two generation problem that requires early

intervention and greatly improved communications between the schools and parents.

Partnering with the School Department, three elementary schools that serve Langley Park, and the University of Maryland, CASA secured a \$3 million i3 grant for Learning Together (LT). The University of Maryland's School of Education was a new recruit to CASA's design team, and has become a key

partner, helping to develop the Learning Together curriculum and working with the Urban Institute to design the evaluation.

In the i3 grant as with the work on the Purple Line, CASA's commitment to community organizing and leadership development pays off. The campaign for the Purple Line Community Compact adopted classic Alinsky-style community organizing. Residents demonstrated their support and confronted public officials at rallies organized by the coalition. In the case of Learning Together, resident engagement is built on the peer-to-peer "promodores" model. As the proposal narrative explains the concept:

Creating a new, trusted, socially-robust scaffolding for the exchange of knowledge is the work of LT's parent-promoters, trained neighbors hired from the community. Public health organizations increasingly use promoter models, which are proving effective in improving health outcomes as well as decreasing costs. Health promoters employ door-to-door outreach in areas of dense residential concentration...to engage residents. As members of the communities they serve, health promoters function as peer educators and are more likely to engage community members in honest discussions about sensitive matters. Although health promoters have been active with children and families for many years, there is little application of neighborhood-based parent promoters. The LT promoter program will be modeled after CASA's highly-successful health promoter program that in 2012 alone provided information to more than 10,000 people.

CASA hired Lidia Rivas, the Langley Park resident and CASA member quoted earlier in this case study, to coordinate Learning Together. The program includes training for parents to help them understand and navigate the school system and training for teachers to improve their communications with Langley Park families.

This approach has succeeded in advancing the SOMOS Langley park vision despite the Promise Neighborhood funding setback. And a year later CASA has regrouped, reconvening the Steering Committee. The progress that was being made by Design Working Groups created energy and excitement. Members experienced the value of having an overall vision and plan for Langley Park, and the Steering Committee is reemerging as the appropriate structure for coordinating the Working Groups' activities.

WORKING TO BUILD QUARTERBACK CAPACITY

Implementing a comprehensive people- and place-based approach created new challenges, in particular the need to reorient CASA's data management system. "The membership database has been used to enroll individuals coming for a particular service – a singular reason – a campaign, a legal service," Escobar explains. "It is quick. We are focused on immediate needs." Now, however, with SOMOS Langley Park CASA is interested in information about families, not just individuals, across services and campaigns. So it has designed a registration process that captures far more information about a family's circumstances and how members of the household interact with various CASA and partner programs. Learning Together parent-promoters are equipped with tablets. They create a record of every contact they have with a family. According to Freeman these data along with registration information "allows us to ask, 'How can we improve the circumstances of the family unit regardless of status, rather than focusing on individuals?'"

It also created demands on administrative staff. CASA has a two person technical support staff who maintain the organization's computer infrastructure and troubleshoot user problems. In order to meet the increased need for data and reporting across the collaborative, CASA hired its first data manager.

Another challenge faced in managing a cross-silo collaborative is the cost associated with the community quarterback role. On the surface, nonprofit finance looks simple: You conceive a program and search for funders who will underwrite it, at least for a year or two. In reality, it is a complicated jigsaw puzzle of matching sources with uses. To assemble the resources to fund its \$7.5 million operating budget CASA relies upon 150 to 200 funders, according to Freeman. This includes several large government-funded contracts. Jigsaw puzzle pieces are not interchangeable. The public sector sources place tight restrictions on overhead costs, limiting the nonprofits ability to generate unrestricted funds for new initiatives. Most foundation grants restrict the application of money to specific activities, too. It isn't easy to squeeze out of the resulting budget money to perform as a quarterback. CASA's development director explains that foundations operate in silos, just as their grantees usually do. "Yes," she continued, "funders might respond that they like the comprehensive framework, 'but we're a health funder.'" Consequently, raising funds for the costs that are specific to the quarterback role – coordinating the collaborative activities, collecting and analyzing data, and communicating about the collaborative to the public and funders – is quite challenging. After all, Moreira-Smith noted, "Real collaboration takes real time." The Promise Neighborhood planning grant helped with these costs initially. But when that ended, the PIP grant was critically important in funding those costs and enabling the collaborative to move forward.

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CASA's experience highlights a number of potential insights about taking on the role of a community QB and building a cross-sector, cross-silo collaborative:

Nimbleness in the face of changing realities

It is tempting to think of the process of building a collaborative as smoothly transitioning through recognizable stages, from identifying the partners, to building trust and commitment, creating a shared vision, etc. But CASA's experience shows the need for nimbleness and perseverance as realities shift. By the time the PIP grant award arrived at CASA, it was apparent that the federal Promise Neighborhood implementation grant NOFA would never be issued. This was a significant setback. Without hope for a well-resourced federal grant, as noted earlier, some of those who had been attending steering committee meetings refocused attention on their own individual organizational priorities. With PIP's support, CASA was able to maintain the attention of key partners on near-term, achievable goals. Despite the waning engagement of some of the original partners, new ones have signed on. And now, fortified with fresh recruits, the Steering Committee is reconvening.

Need for increased capacity

Even for organizations with the high level of capacity that CASA has, taking on the quarterback role creates new demands, which require building additional capacity. For CASA, this meant both having to build out the functionality of its core database, as well as adding its first data manager.

Complexity of funding the quarterback role

While many funders encourage nonprofits to collaborate, there is often not a clear understanding of the extra work it involves, nor a willingness to fund it directly. The Citi Foundation's leadership in providing funding dedicated to supporting the QB role can provide an example to other funders of both the need for, and the benefit of, providing the "glue money" that enables cross-sector, cross-silo organizations to achieve meaningful results.

CASA's experience also provides evidence of how and why organizations working together in the community QB model have the promise of achieving more than if they all worked independently in separate silos:

Resident engagement + cross-sector collaboratives

All the PIP grantees have sought to engage community residents. CASA is the only membership organization among the PIP cohort. One of the striking themes that emerge in CASA's PIP project is the power of its 68,000 members when combined with the activities of cross-sector cross-silo collaborative.

Funding

While the challenge of raising sufficient QB funding persists, it is worth noting that CASA's membership generates several hundred thousand dollars a year in unrestricted income. While there are many competing internal claims on those funds, CASA demonstrates that organizations, even those serving very low-income constituencies, can generate revenue from the communities they serve and need not be entirely dependent on public sector contracts and philanthropic grants.

Purple Line Compact

The SOMOS Langley Park collaboration was critical to making the progress to date in advancing the Purple Compact. But being able to mobilize thousands of residents to rally behind the Purple Compact cause gave this effort far more influence in negotiations with governmental bodies.

\$3 million i3 grant for Learning Together

CASA's commitment to community organizing and leadership development enabled the collaborative to put forward a peer-to-peer "promodores" model, which was a key element in the successful grant application.



