



*National Initiative
on Mixed-Income
Communities*
at the

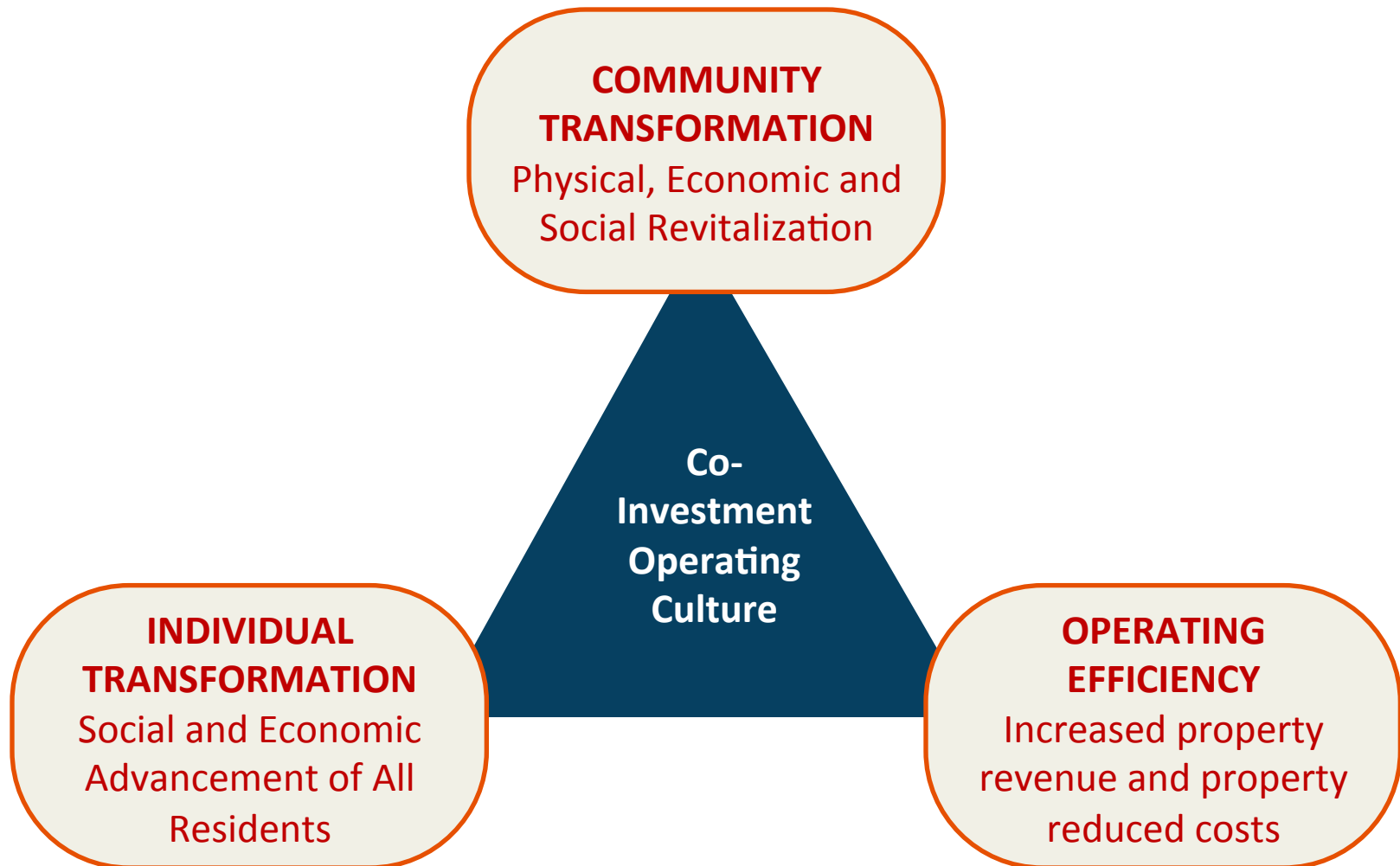


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CASE WESTERN RESERVE
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Triple Aim Impact in Mixed-Income Communities

A Joint Venture of
Trusted Space Partners and
National Initiative on Mixed Income Communities

The Triple Aim Framework for Mixed-Income Development



Triple Aim Impact: Our Value Proposition

TSP and NIMC work with owners, managers, residents and other partners of mixed income developments to articulate and advance a Triple Aim goals framework:

1. **OPERATING EFFICIENCY:** Increased Property Revenue and Reduced Property Costs
2. **COMMUNITY TRANSFORMATION:** Physical, Economic, and Social Revitalization
3. **INDIVIDUAL TRANSFORMATION:** Social and Economic Advancement of All Residents

Our core innovation and expertise is to help shift the operating culture from a narrow focus on compliance and needs based services to one of shared aspiration, problem solving and innovation.



Our Guiding Framework

- 1. OVERARCHING GOAL:** To develop thriving communities through co-investment with residents, staff and partners.
- 2. UNDERLYING BELIEF:** We are all human beings – residents, staff, partners - interdependent on one another for a quality life.
- 3. UNDERLYING STRATEGY:** Create *intentional spaces, practices and a network* for mutual exchange and collaborative action.
- 4. IMMEDIATE OBJECTIVE:** Shift the current operating culture of fear and isolation to a culture of aspiration and connection.



Our Motivation:

- Creating, operating and sustaining successful mixed income housing is far more complex than originally envisioned.
- Requires a sophisticated approach to financing and asset management, property management, resident services and community building.
- The standard housing management practice, linked to a typical array of social services, is not enough to ensure medium-term success and long term viability.
- The development arm of the affordable housing industry has evolved and changed dramatically over the last 25 years to achieve a high level of sophistication and innovation in the financing and asset management of mixed income developments.
- It is time to support the same kind of evolution in the property management, resident services and community building dimensions of operating mixed income developments.



Our Philosophy:

- We believe a “systems approach” to mixed income housing is critical and that two fundamental system shifts are needed:
 - A GOAL SHIFT from separately-defined goals for asset management, property management and resident services to a unified “triple aim” framework which emphasized the shared interests of owners, managers, service providers and residents.
 - AN OPERATING SHIFT from narrow focus on maintaining compliance, meeting needs and solving problems to a more aspirational operating culture designed to create the kind of co-investment among owners, staff and residents needed to achieve both individual and community transformation.



How do we create a more functional operating system?

We cannot “solve” cultural or system dysfunction. Instead, we can replace the current reality with a new reality based on respect, mutuality, genuine caring for the future and a willingness to take risks together.

How do we really make this happen?

- 1. Shift our orientation from being “outside the system” to being a part of the system.** What kind of mental model am I or we using that limits our ability to understand and innovate?
- 2. Help others see the whole, larger system** and that our individual perspectives filter the way we interpret the whole system. We need each other to see it accurately. Hold up the mirror to capture and reflect on the underlying assumptions taken for granted.
- 3. Shift from reactive problem solving to co-creating a new reality.** Help people articulate their deeper aspirations and build confidence based on tangible accomplishments achieved together.
4. Instead of making change happen, **create spaces and conditions that BOTH produce the change needed AND sustain on-going reflection and change** as the process unfolds.

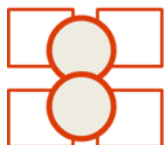


Public Housing Transformation Strategy: Focus on Shifting the Operating Culture For Better Outcomes

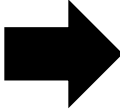
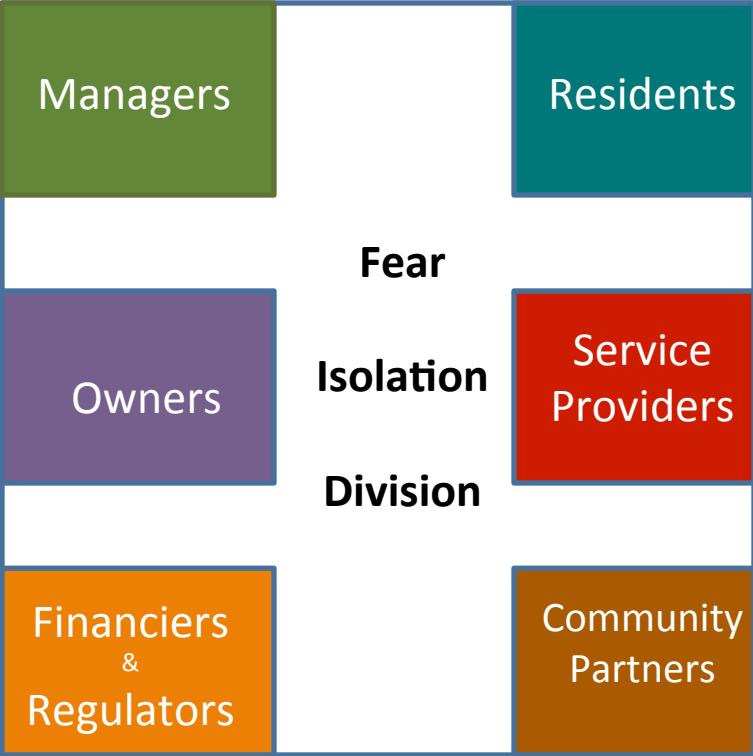
Attempts to transform challenged communities often fail or end up with the people involved feeling angry, divided and/or fearful of each other. Some reasons?

- Development process takes too long, residents are disbursed and there is a long period of limbo; for residents and for the community
- Limited choices, limited time and limited support for helping residents resolve lease violations and other impediments to return
- Conflicting goals and messages among the multiple partners involved in project implementation;
- The rhetoric around “return” is not substantiated with intentional, proactive and collaborative work by partners
- Residents don’t understand or trust the process and often fail to take advantage of support that is available to resolve issues
- Little investment in pre/post development neighbor to neighbor connections of mutual support and aspiration.

Overall, the operating culture of these change moments is transactional, and reinforces difficult power dynamics, and the isolation and division of the parties involved



Typical Affordable Housing Environment



When these gaps and elements dominate, it is difficult to solve problems, transform communities and achieve long term viability.



Individuals Suffer

Resources are wasted or misused.

	DIVIDED and FEAR BASED MINDSET/BEHAVIORS	CONNECTED and ASPIRATIONAL MINDSET/BEHAVIORS
Current Residents	They are going to screw me! I am fighting for my life.	I am needed to help make this a better place and I can live a better life if I contribute.
Site Management Staff	They hate people in my position. If I keep my head down and follow the letter of the law, I will make it.	I need the residents and the service providers to help make this a thriving community. And, my day to day quality of life is better when we work together.
Service Providers	They are needy. I am here to help and protect them from themselves, and from the management staff and all of the other system people.	I need the residents and the site managers in order to make a difference in this community. This way produces more resources and is easier to manage.
Owners/Regulators	The only real way to achieve results is clear goals and strict accountability. My primary role is to keep in line all of the different people responsible for implementation.	I am a participant in this shared eco-system of housing. My relationships and my behaviors can be the primary spark to new and positive relationships and behaviors in residents and staff.
New Residents	I took a risk and I am paying good money. I need to fight for my right to peace and prosperity.	I am fortunate to live in a diverse neighborhood I n the city, close to my job. I cannot fully enjoy these benefits without knowing and exchanging with my neighbors and the staff.
Neighbors	They don't care about our community. If I don't fight for safety and security, no one will.	My ability to effect change in my community depends on enrolling as many of those who live and work here as possible. I need them as much as they need me.

Traditional Community Spaces

- Reinforce top down decision making and positional power
- Relies on archaic forms of engagement
- Invests in heirarchical forms and Representative decision making
- Reinforces strict role definition
- Feature Extraction as learning/information gathering
- Separate talk and action

Aspirational Community Spaces

- Feature co-investment, co-creation
- Adheres to Form Follows Function
- Reinforce value of human-first peer to peer connection
- Invest in strengthening relationships across difference
- Mitigates and loosens formal role definition
- Feature engagement as learning/information gathering
- Integrate talk and action

Town Hall Meeting

Resident Association Meeting

Focus Group

Resident Survey

Steering Committee

Workshops

Support Group

Management Sponsored Block Party

Case Management Session

Recertification

Home Inspection

Network Night

Network Action Team

Neighbors Circle

One on Ones (on Street or at Doors)

Design Team

Mutual Learning Exchanges

Mutual Support Circle

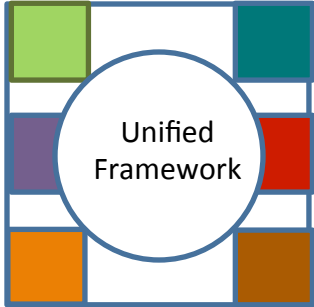
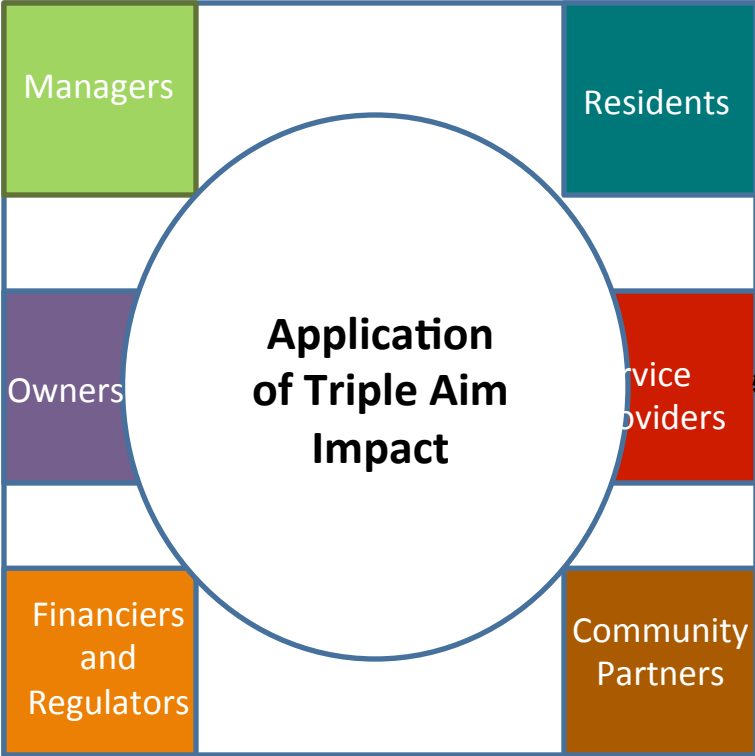
Management/Resident Block Party with Network Invitation

Case Management Session with Network Invitation

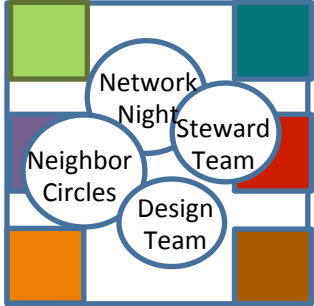
Recertification with Network Invitation

Home Inspection with Network Invitation

Typical Affordable Housing Environment



- Shared Goals:**
1. Operating Efficiency
 2. Individual Transformation
 3. Community Transformation



Intentional Spaces and Practices =
 New Exchanges of Value and New Understanding



A New Form =
 New Network of Collaborative Relationships and Shared Problem Solving Across Lines of Difference



NETWORK NIGHT

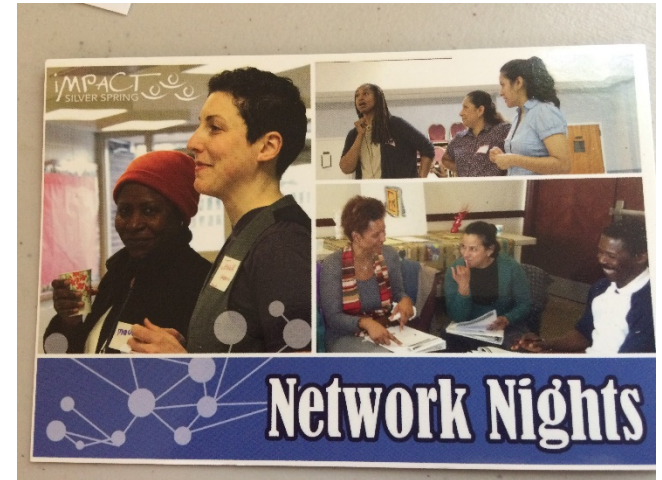
An informal gathering with good food and music

A Place to meet and get to know each other

**A Welcoming,
Fun and
Interactive Space**

Time for conversation about things we care about and how to take action together

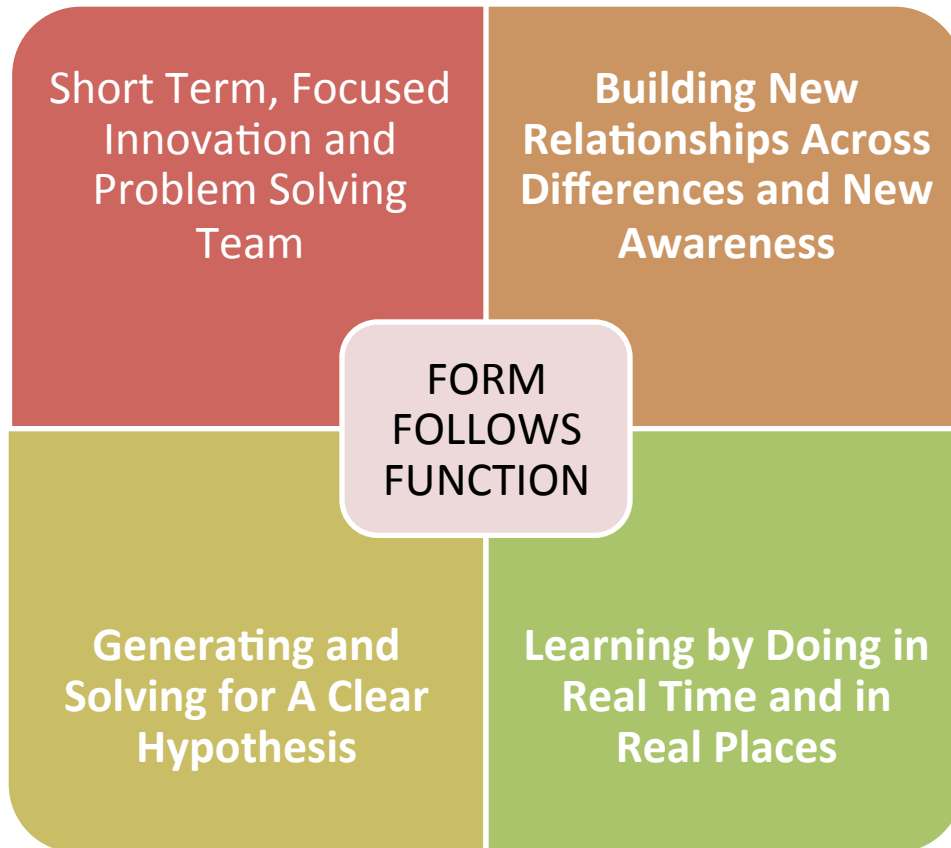
Opportunity to Get Good Information and Exchange Favors



- **NETWORK NIGHT**
- A **highly ritualized 90 Minute Format** that features maximum resident involvement and ownership.
- The objective is to use the **same format each time**. In this way both staff and residents get comfortable with the routine of organizing and executing the mixer.
- The format has **6 components** which staff and later residents are trained to execute.
- Each of these elements is designed to create a sense of **comfort, fairness, equality, and openness**.
- The core objective of the mixer is to serve as a kind of **'village square'** for the community.
- Network Night is ***"The place where we meet and greet, have the conversations we want to have, and exchange wisdom and favors. "***

1. **Q the Space:** Work to create an open and fun atmosphere in the space, including good food, music, decorations, comfortable seating and a welcome table.
2. **Q The Welcome:** Host an easy way for people to start informal conversation, such as a game or mixing activity that occurs while folks enjoy good food.
3. **New and Good:** People are brought into a circle to share name and something new or good that has happened in their life in the past few weeks, giving everyone the opportunity to speak or pass.
4. **Table Talk:** 20-25 minute small group conversations. Individual participants are invited to propose conversation topics that they want to have and would agree to host. 3-4 of these are selected and participants choose which conversation to participate in.
5. **Marketplace:** Convened back together in a circle, participants bid for time to make specific offers and requests of skills, talents, capacity, advice and stuff.
6. **Bump and Spark:** Fun energetic ending as people are invited to close the deal on any new matches or connections they made, and to help clean up the space.

Design Team



- ✓ **Empathize:** Start from the experience of those who live the problem or the challenge. This means get out of your heads and meeting rooms and engage and immerse in real time, real lived experience.
- ✓ **Define:** Frame, focus and direct the inquiry. We often will use a “hypothesis” statement to capture the framing and focus of the endeavor.
- ✓ **Ideate:** generate creative out-of-the-box ideas.
- ✓ **Prototype:** Turn the idea(s) into an action strategy. Focus on the “How”
- ✓ **Test:** Just do it. Try it out quickly, cheaply and on a tiny scale. And most importantly squeeze every drop of learning out of the experiment.

Key Ingredients and/or Operating Principles for a Design Team (PT. 1)

- **The Context:** Use of a design team usually follows an earlier phase of community engagement and initial relationship building. In a Network Environment the Design Team is one of many kinds of rooms that help people build relationships while taking some kind of action. Design Team is specifically useful when a small group of people have identified a specific challenge or issue that they want to address AND have a hunch about how to address it BUT really want and need a wider circle of people to think with them and innovate.
- **The Host:** Being a “host” is not the same as being a “leader” in the traditional sense. In a Network Environment what is needed more than traditional leaders are people who will help create, shape and protect the spaces for problem solving and innovation. In a Design Team it is important to have two or three people who can serve as the core Host team, charting out the design team sessions and inviting others to participate. Their positive, proactive energy is critical. The “Host” designation has several characteristics. It is a choice. A host is a willing and enthusiastic ‘inviter’. You are a participant as well as an inviter. When you plan a party it’s not just for other people, it’s for you too.
- **The Invitation.** When you plan a party you don’t send an invitation to guests saying “what do you want to do when you are here?” You plan activities and prepare guests to participate well. “It’s a pool party so make sure you bring your suit!” The invitation is personal and based on the idea that you want and need to bring people together to tackle a problem or to explore your hunch. The most important step is framing the invitation in a compelling and clear way so that those who are invited understand that this is an experiment - a time to step out of comfort zones, assume risks and try out new thinking/new action.
- **The Commitment.** The Design Team is always time limited and with a set number of sessions/steps that are clearly identified. This is not a committee to preside over a process. This is a ***heart and mind strike force*** that comes together for an intensive and quick period of time to tackle something specific.

Key Ingredients and/or Operating Principles for a Design Team (PT. 2)

- **The Value Proposition.** There is a clear value proposition connected to the design team: sometimes this means providing stipends or some other compensation for participation. Sometimes it's a field trip you all take together. But there is some 'sweetener' that emphasizes the idea that you are asking people to make a commitment and come in and do a job.
- **The Hypothesis.** The Design Team uses the analogy of the "mad scientist." We are mad scientists who are crazy enough to think we can invent something new. We aren't afraid to try. We aren't afraid to fail. And we are committed to having crazy fun in the process. Following out this analogy we have found it helpful to frame an "If, Then" statement around the core "Hunch" that the Hosts are carrying around. This helps to give a framing and focus to the endeavor.
- **The Grounding.** The thinking and conversation is always rooted in truth (facts) and lived experience. The process includes action research – or homework in between sessions – that encourages members to be actively gathering and introducing new information – not just 'representing' in group discussions.
- **The Compact.** Importantly all members - including the Hosts - need to participate in the design team as peers... this is NOT a program for others. These moments will produce lasting results only if the quest is genuine and shared.
- **The Relationships.** The key artistry of this process is to weave in genuine relationship building moments to reduce fears and to stimulate creative juices across lines of difference....all within the limits of precious collective time.

Design Teams vary in size and in length. Here is an example of a possible Flow, using a four session format:

First Session

- 1. Fun, Food**
- 2. Relationship Strengthening; Our Stories**
- 3. Getting Grounded with the Facts**
- 4. Exploring the Hypothesis Statement – from a personal perspective**
- 5. Experiential Homework Exercise**

Second Session

- 1. Fun, Food**
- 2. Relationship Strengthening: Our Different Perspectives**
- 3. Capturing and Understanding New Awareness**
- 4. Network Mapping**
- 5. Short Term Action Plan for Experiments**

Third Session

- 1. Fun, Food**
- 2. Relationship Strengthening: Taking Risks and Building Trust**
- 3. Workshop Sessions and Role Playing: Obstacles, Barriers etc**
- 4. Capturing Early Learning and Results**
- 5. Revised Short Term Action Plan for Experiments**

Pause for Experimentation and Learning

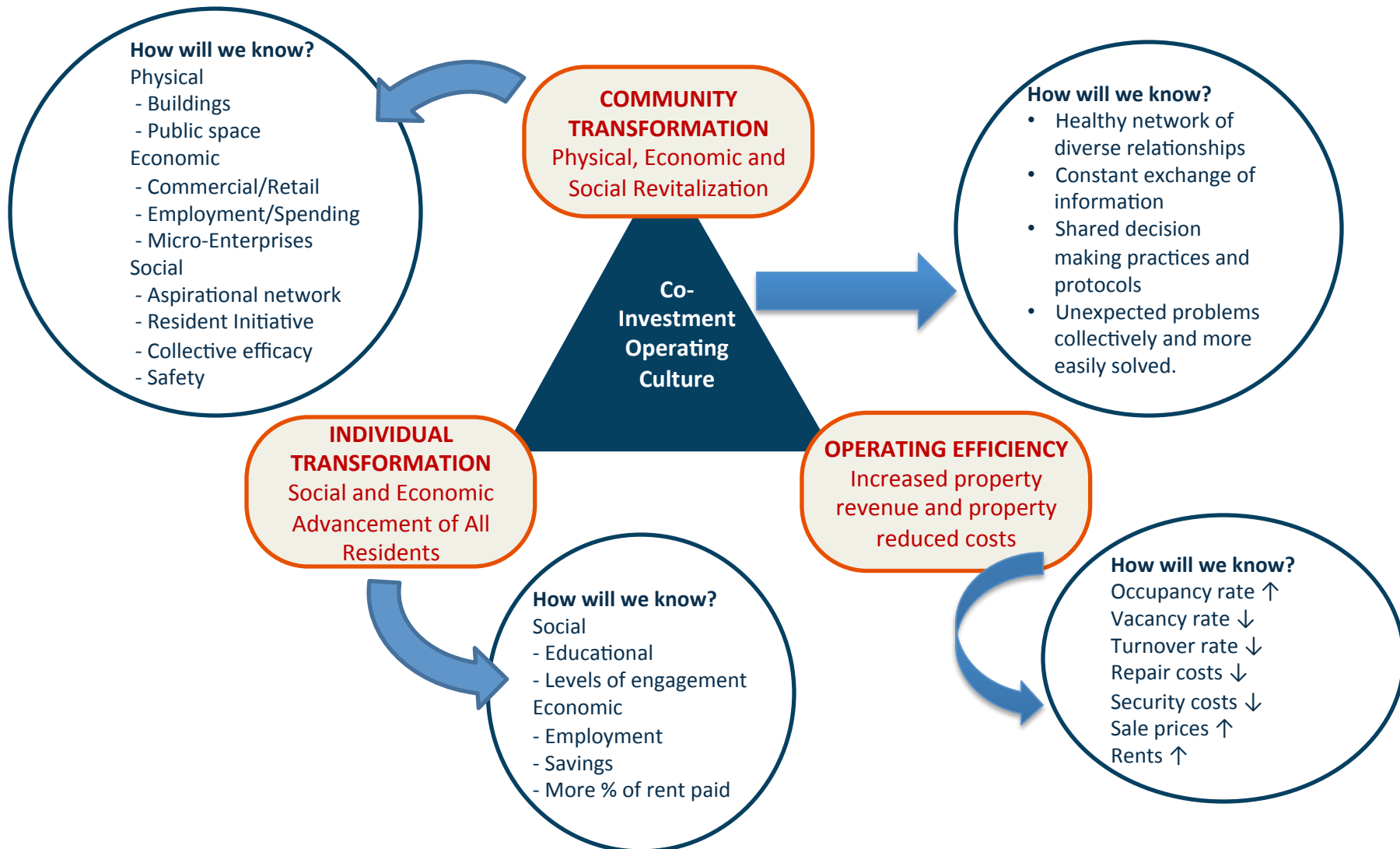
Fourth Session

- 1. Fun, Food**
- 2. Relationship Strengthening: Personal Appreciations and Affirmations**
- 3. Sharing New Learning**
- 4. Creating Containers for Next Steps or Letting Go**
- 5. Specific Invitation to Continued Relationship Building and Shared Action**
- 6. Celebration**

Hypothesis at Edgewood Commons

- If we are going to create high quality places to live and work, we must RECOGNIZE THAT EVERYONE IN THAT PARTICULAR ECO-SYSTEM (RESIDENTS, STAFF, PARTNERS) IS A HUMAN BEING WITH SOMETHING TO CONTRIBUTE AND that we, as human beings, are interdependent on one another's contributions in order to achieve a high quality of living and working.
- If we create intentional spaces, practices and a network for mutual exchange and collaborative action, WE CAN SHIFT THE OPERATING CULTURE OF ISOLATION AND ANGER TO A CULTURE OF ASPIRATION AND CONNECTION.

The Triple Aim Framework for Mixed-Income Development: Measurement



Triple Aim Impact: Our Services

1. **STAFF AND RESIDENT ENGAGEMENT:** Shaping New Intentional Spaces and Practices for Co-Investment in the Housing Community
2. **STRATEGIC COMMUNICATIONS:** Crafting New Messaging, Communications and Learning Tools for Triple Aim Integration Company-wide
3. **STAFF DEVELOPMENT AND COLLABORATION:** Providing Capacity Development and Identifying New Triple Aim Protocols/System Fixes for Site Staff Operations
4. **ORGANIZATIONAL ALIGNMENT:** Designing Vertical and Horizontal Alignment Strategies to Achieve Triple Aim Impact Across Business Lines Throughout the Organization
5. **LEARNING:** Documenting and Evaluating the Impact of the Triple Aim Framework and Operating Culture Shift

