

**FINAL REPORT
COMMUNITY ECONOMIC DEVELOPMENT PROJECT**

MERRIMACK VALLEY ELDER PARTNERS

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A. DEFINITION OF THE PROBLEM

1. Project Summary

My project was to generate a series of issues forums for people over 60 in the Merrimack Valley. The mission of the group I worked with, Elder Partners of the Merrimack Valley, is to "organize and empower elders in the Merrimack Valley so that they can advocate for themselves to improve services and conditions". The process was to survey various elder providers (housing authorities, family service agencies, visiting nurse associations, Councils on Aging) to get a sense of what the elder network feels are important issues. The group then held a series of "community speak-outs" with elders throughout the Merrimack Valley. These were held in elder housings using peer facilitators. Issues generated from these two sources shaped the focus of the legislative forums. The first forum held was with state representatives, the next with national representative and a third with state representatives again (in a different district of the valley). The focus of these events was to gather together elder constituents with change makers. The underlying purpose of the project continues to be to create informed, empowered and organized advocates. My role in these activities has been to work as facilitator of the planning meetings, and provide administrative resources.

2. Background of the Merrimack Valley

The Merrimack Valley is an area of severe extremes. Economically, the area is home to one of the poorest cities in the State, Lawrence. While right down the road from Lawrence is "neighboring" Boxford which has one of the highest average income levels in the state. The area has coastline, open country, densely populated urban areas and the Merrimack river joining it all together.

Lawrence, in the middle geographically, is perceived as the economic sinkhole of the area. As John Doran Retired Volunteer at Lawrence Chamber of Commerce commented, "Lawrence is the core of the economic apple of the area, and if the core is bad it doesn't matter how pretty the skin is..."

Lowell and Haverhill the two other population centers in the Valley are seen in much the same light. Both experienced some rehabilitation (esp. Lowell) during the 1980s, but in the past 5 years have seen a economic decline. In the 1960s and 70s economic heart of these cities, its textile and shoe manufacturing, moved down South and overseas. What has been left is an empty hull of huge buildings and an area searching for an economic base.

The geographical and economic differences are also reflected in the racial/ethnic diversity of the area. Since the industrial boom of the mills at the turn of the century Lawrence and Lowell have been an "immigrant cities" with Irish, Italian, and French Canadians the first wave immigrants drawn to the area by the promise of jobs. The most recent immigrant groups are from Latin American countries and Southeast Asia with the majority from Puerto Rico, the Dominican Republic, Cambodia and Vietnam. In the past ten years the percentage of Latinos in Lawrence has risen to 41% of the total population, (10% Latinos of people over 60) It is these recent immigrants who live in the deepest conditions of poverty the urban areas of Lawrence, Lowell and Haverhill. It continues to amaze me that the older immigrants groups have such short memories of what life in a new country was like for their parents or themselves. Yet I often hear "Well those people just have to learn English". The city of Lowell several years ago voted to declare itself an English-only city.

For elders in the Merrimack Valley, the dramatic economic decline has been particularly devastating. Many elders living in the area worked in the Mills and receive no pension and only a monthly pittance from Social Security. Those often in deepest poverty are older widowed women who may have raised children and then returned to work, or worked in jobs that did not contribute to Social Security. Also living below poverty are many of the 3,199 minority elder in the Merrimack Valley.

Another factor in the decline of the area has been the increased isolation of elders. People often feel like prisoners in their own homes because of crime and the condition of the neighborhoods (this is especial true in urban centers). There is also an increased polarization in urban areas of older Anglos and younger non-English speaking new immigrants.

There are over 80,000 people over 60 in the Merrimack Valley, 14.3% of the total population. Consistent with national trends the number of elders in the Merrimack Valley has risen by 5,400 in the past ten years. National projections estimate the over 60 age cohort to grow by 15% over the next ten years. Yet while national trends over the past 10 years have shown a decline in poverty levels of people over 60, Massachusetts has seen an increase of over 10% in elders living below poverty. This is mirrored dramatically in the Merrimack Valley (see attachment A).

3. Problem of the community addressed by this project

Based on my work with elders across the Merrimack Valley, I find that many elderly, even though they may live in housing projects or other group settings, really live in isolation, fear and silence. They have no chance to voice their ideas in a supportive community setting. They even have less of an opportunity to inform local leaders. Lastly their chance to organize their collective voice around topics of their choosing is remote, if non-existent.

We will, through this project, address these problems by bringing elder together to share ideas. We will then organize events where they can inform local change makers of their concerns. And we will, as an ultimate object, help them organize around self-directed agendas. This last step is their first toward community empowerment.

In isolation, fear and silence community can not be built. Community organizing and advocacy are critical steps on the road to economic development. To empower and organize a group is the first chance for them to make some change in their lives, their housing situations and their incomes. The Merrimack Valley Elder Partners are focused on empowering elders of the area and bringing them together with local, state and national representatives to become change makers for their areas.

4. Project group

The group I will be working with on this project is called the **Merrimack Valley Elder Partners**. It is made up of a individuals from Elder Services of the Merrimack Valley and elder community advocates. This group was formed nine months ago and was a brain child of one of the elder advocates on the committee. The mission of the group is "**To organize and empower elders in the Merrimack Valley to advocate on behalf of themselves to improve services, and conditions in housing and for people over 60 in the Merrimack Valley.**"

The Lawrence elder tenants council had elections at the beginning of 1994. After a dormant period of over a year a new slate of 29 representatives from different elder housings around the city a new council has been formed. From this newly formed group has come the energy for a project to organize and activate other tenants groups across the Merrimack Valley. The president of the Lawrence Tenants council was the person who first approached Elder Services to be a part of organizing a series of advocacy forums with changemakers/politicians on a local,

state and federal level.

Our first activity was to target 10 housing sites for an intensive needs assessment/organizing forum. From these activities we came up with a list of priorities to work on with politician and appointed officials from the area. Another goal of these meetings was to recruit a core activated group of elders to attend a central meeting in their area.

Meetings our planning group have been held monthly. Our organizational model was to be designed to have elders running these meetings and Elder Services providing support as needed. It has changed in that the group is working as a team with staff from Elder Services facilitating meetings.

Even after one year we are still very much in a formative stage, with a need for a diversity of elder voices to join our ranks. Some reasons for this will be outlined in "Lessons Learned". Work has been focused on recruiting new members to the planning committee.

B. PROJECT GOALS

Mission Statement/Project Goal: To organize and empower elders in the Merrimack Valley to advocate on behalf of themselves to improve conditions and services.

1. The project's first goal is to encourage and facilitate elder participation through Community Speak-outs. These events were designed to be places to share ideas and gain courage with others who had similar issues and concerns. They were set in places accessible to elders (elder housings, Councils on Aging) and the group directed the topics of discussion.

2. The project's next goal is to encourage elder advocacy, through legislative forums. We attempted to bring people together with their elected and appointed representative to make change through sharing their issues and brainstorming solutions together.

3. The projects third goal continues to be to help elder groups contacted through the first round of "community speak-outs" to organize around issues important to them. This will ultimately create local community groups focused on their own issues but also able to work on state and national issues together.

Minimum objectives

The minimum objective of this program was to hold a series of community speak outs, have elders design and issues agenda, recruit interested elder advocates and then cumulate in a series of issues forums with local, state and national representatives.

The long range objective (past the time range of this presentation) is to encourage community groups to generate their own agenda of issues and organize around them.

On-going action steps to reach these objectives will be (1.95-5.95):

1. Continued recruitment for core planning team with an emphasis on diversity and older advocates.
2. Follow-up - on information sharing - reconnect with the 200+ people who have attended Community Speak-outs and forums.
3. Organizing - start to help targeted elder groups organize around issues of importance to them.
4. Ongoing information gathering - continue information gathering through additional community speak-outs in targeted communities.

C. METHODS

1. Outline of project activities

★April 1994

A group of elder advocates from Elder Services and the Lawrence Tenants council came together as the Merrimack Valley Elder partners. We agreed on a Mission statement and a six month plan of action. (see attachment B)

"Elder Needs survey" was sent to 100 people in the area elder network. Many are people from human service, private or government agencies whose customers are elders. We received 25% back with the following list of priorities:

1. Depression and Loneliness
 2. Health Care Costs - Understanding Medicare/Medicaid
 3. Transportation
 4. Fear/Violence/Crime/Safety
 5. Income Levels
 6. Access to Services
 7. Affordable Housing
- (see attachment C)

★May 1994

We held our first round of Community Speak-outs at area elder housings. We had mixed results. For example, personal issues between neighbors were quick to emerge at several sites turning the meeting into a feud rather than an organizing event. In another case one of the "facilitators" of our group dominated much of the conversation and would negate or try to "solve" issues that came up on the spot. As we continued our meetings, we developed a cohesive agenda to run them and maximize resident participation (see attachment D). We also learned other lessons: we took better notes after seeing how sketchy our records were of the first few meetings; and we remembered to pass around an attendance list after forgetting to do so at the first three meetings. (I will cover many other "lessons learned" in Part E of my paper.)

The needs/concerns raised in the first four speak-outs were:

1. Recreation
2. Safety
3. Prescription Drug Cost
4. Health Care - Insurance coverage

Other site specific issues were:

- *Elimination of jury duty for people over 62.
- *No smoking in housing common areas
- *Better ventilation in the summer
- *Buses to New Hampshire to take advantage of no taxes when shopping
- *Safety of crossing light in front of One Water Street
- *Need for Weekend meals Program
- *Bench needed in vestibule area so people could wait inside
- *Doors very heavy when you come back from shopping

★June 1994

We held our legislative forum at the Methuen Council on Aging. Four State Representatives and two State Senators showed up along with 15 elders from the area. The discussion of issues raised through the first round of Community Speak-outs was lively and the group did some brainstorming on possible solutions to issues presented. While the elders had a written agenda of issues, it was interesting that most of the concerns never got concrete answers from the legislators. The group allowed the legislators to tangent off on topics they felt comfortable discussing. We got some local press coverage on this event in agency newsletters and a small local circular.

★July 1994

We held four more Community Speak-outs. We were encouraged by better turnouts, we had twenty or more at each site. People seem to start off very quietly but warm up quickly, some to the point of boiling over. We noted that people had a lot to say but were often very fearful of organizing. "Oh they never listen to us and I can't afford to live anywhere else" was heard at several meetings. Some elders fear the authority of the housing managers, or others in power. Another problems the planning committee faced was to stick to our mission of empowerment, not try to rush in to solve these problems, but find tools for people to be able to solve their issues **themselves**. Some of us find it hard to break away from the traditional human services "fix-it" model.

Members from the planning committee met with Paddy McDonald from the Lowell Housing Authority to get her input and help in organizing in the Lowell area. She pledged her help in coordinating meetings in the City of Lowell.(see attachment E)

★August 1994 We focused on publicity of activities, recruitment and re-grouping.

★September 1994

We worked to bring folks out in the Lowell area holding a Community Speak-out at Archambault Towers - through the Lowell Housing Authority we sent a flyer to every elders from Lowell public housing. Twenty-five elders showed up for this event, despite some confusion in publicity. The meeting was very lively, (although smokey) the group focused on issues of safety and supplemental medical insurance. Several of the participants said they would attend the Lowell legislative forum in November.

★October 1994

We held a second legislative forum at the Haverhill Council on Aging. Congressman Peter Torkildsen (R-Essex County) attended along with fifteen elders from the area. Areas of discussion include issues raised by area community Speak-outs. Again although ideas were discussed and brain-stormed, no clear plan of action was set by the group. There seemed to be a tendency in all of the legislative forums to tone down demands and let "authority figures" off the hook. Congressman Torklidsen did little to address issues raised expect speak of the recently passed Crime bill.

Members from Elder Partners met Ken Gladston and Jose Crus of the Merrimack Valley Project for an information session and to discuss possible linkage.

★November 1994

The group held its third legislative event at the Lowell Council on Aging. It is not our best event in terms of acoustics, attendance, and legislators understanding why they were there. We had a State Rep. and Senator show up quite late along with only five elders from the Lowell housings. We learned a lot about things you can control and things you can not from this mediocre event (see section E, lessons learned).

★December 1994

The group met to "regroup" and refocus on our objective of community organizing. A key member of the group resigned and new members came aboard. Turnover and spotty attendance at planning meetings has made cohesive visioning for the future a problem. The group worked on an draft action plan that it will finalize in January with specific action steps to move forward in its objective to organize (see attachment F).

2. Tools Defined

✓**Survey Tool** - The survey we used in the very beginning consisted of asking people to rank five "problems you see facing elders in your community". These results were used to generate our first list of issues and to recruit people to the planning committee and to future events with a name and address section. From our initial response, we started a mail database. (see attachment C)

✓**Community Speak-out** - These were open community meetings held at various elder housing throughout the Valley. The agenda of these meetings would be: 1) Introductions, Why are we here; 2) Structure of Speak-outs and upcoming legislative forums; 3) Pep speech from peer activist; 4) Open floor for discussion; 5) Present data from initial survey and other community Speak-outs; 6) Enlist folks to come to legislative meeting.(see minutes attachment G)

✓**Legislative Forum** - Legislative forums have been held at local Councils on Aging. We publicized them in area newspapers and worked on providing transportation for elders in the area to attend. We have been holding them early friday mornings but are experimenting with holding them mid-morning on either Fridays or Mondays. We talked these up at the Community Speak-outs and encouraged people to attend. The agenda for the forums has been: 1)The group explains mission and actions to date; 2) The group presents the list of concerns raised at community speak-outs; 3) The audience adds their own concerns and expands on list; 4) The legislators respond to concerns, 5) Dialogue/problem solving on specific concerns by elders and legislator. (see attachment H)

✓**Planning Committee** - This is the steering committee of the project. The initial members were Elder Services employees and members of the Lawrence Tenants Council. It has expanded to include other service provider agency reps, an AARP representative (elder from Lowell), a retired government worker (now full-time volunteer), a retired school teacher (now full-time volunteer), a representative from the North Andover Tenants council (elder), a MSW employed with Family Services of Greater Lawrence, a representative from the Lowell housing authority, and a manager of a private housing in Lawrence. The committees role is to design and move forward with an action plan in keeping with the mission of the group. (see attachment I)

✓**Publicity** - The Merrimack Valley Elder Partners have used posters, flyers, articles in newsletters and local papers to help publicize and explain events. We have had some success with print media, but need to pursue local cable for future events. (see attachment J)

D. RESULTS

The results of the group's activities and efforts have been mixed. The minimum goal of holding Community Speak-outs and legislative forums has been reached. Over the past year Merrimack Valley Elder Partners have held nine community Speak-outs in nine separate cities or towns with an attendance of over 150 elders in total. We have also held three legislative forums where eight legislators and approximately 30 elders were in attendance. These events have been effective ways to gather information and somewhat effective in expressing that information to elected officials.

These events have been effective in getting people out and getting people talking about concerns in their lives and communities. They have also been first attempts at sharing these concerns with the people that these elders elected and letting them have a voice in politics and policy. While there was talk of apathy and fear at many sites, people were willing to speak out - a first step in overcoming those barriers to organizing.

The group has also generated some positive publicity on its activities in various newspapers and newsletters. This has been effective in getting legislators to forums, and elders interested in what we are doing. We have had some strong interest from two housings and a council on aging to come back and do training on organizing, advocacy and leadership. These sites will become our first focused "organizing" attempts in the next 6 months.

Other not-so-positive results from our methods was a feeling by many in the group that we were attempting too much too fast and by others that things weren't moving fast enough. The planning group has also gone through some very stressful times, with different visions of our direction. We have also been facing limited time and energy to spend on planning and executing any vision. Members of the planning group have full time jobs, or if retired elders, have many other commitments. It has been difficult for anyone to coordinate activities due to lack of time and cohesion in direction.

There was also a fairly naive idea held by the planning group in our first round of community Speak-outs that organizing would somehow magically happen by meeting with a group once. This we found quite quickly was not the case and because we did not focus on doing comprehensive community work with a smaller number of sites, we ended up with a consistent lack of follow through with people attending events. Elders came to these events, spoke up and then never hear from the group again. This has been frustrating for the planning group and for interested people in the communities.

E. ANALYSIS/CONCLUSIONS/RECOMMENDATIONS

1. Lessons learned

There is a difference between advocacy and community organizing

Our group started this process thinking that advocacy and community organizing were one and the same activity. We assumed that by getting people together talking about their issues, community organizing would somehow spontaneously take place. This did not happen and the planning committee was left to try to figure out how we can encourage this to happen. What tools, training, resources do we provide to groups who are interested in coming together? The planning committee is still working on how we will do this. The first year of this group has done a lot to inform and advocate, but has not gotten to our third objective of "empowerment".

Through the community speak-outs and legislative forums an advocacy/lobbying opportunity was set up. Yet in some ways the group jumped over the natural evolution of community group organizing by taking the issues to the changemakers, often without the folks who had raised these issues. We advocated **for** elders rather than allowing them to advocate for themselves. While this has been a somewhat effective way to present issues, in the long run the energy and follow through on these issues that a local community group could bring to these issues is not yet in existence. We have found that while advocacy and community organizing are activities that can dovetail one another, they are not one and the same.

There are some things that are within your control and some things that are not

While this seems fairly evident, it is a lesson that I think all of us in CED have to learn again and again. The group has learned that you can set up rules of behavior and agendas, but that sometimes old tensions and battles take center stage at community (and some planning) meetings. Group dynamics can be worked on but not controlled. We also found in the legislative forum at the Lowell Council on Aging that sometimes your meeting gets pre-empted for something bigger (like a photo op with Ted Kennedy). Yet in that situation we did not figure out the space or acoustics, which is something we **could** have controlled.

The group has tried to learn from its mistakes and work on improving the next event.

Deal with "problem" personalities/ conflicts right away

This is a lesson that I am continually having to push myself and the group toward. In our planning committee we have had one individual who, while very energetic, was also quite simply controlling, domineering and manipulative. It has turned people off of the planning committee meetings and has made remaining members very uncomfortable. The group has tried to deal with this person by trying to temper this person's suggestions (often in the form of demands) or structure the agenda so that other voices are heard. I feel we have not dealt with this well and for the most part have tried to ignore the "problem" person. Conflict avoidance is one of my personal strong suits as it is with many other members of the group. Yet by not dealing with this group dynamics problem, the direction of the group has been held back. This person is now leaving by his own choice, we think, but we have lost a lot of time and energy in trying to ignore the situation.

There is a need for more diversity on the planning committee and in our outreach efforts (prejudice can surprise you).

After our first year of work, we have not yet had contact with Latino or Southeast Asian elders. While we have had Latino elders attend community speak-outs, we have not offered translation services, and this has been a barrier to access. The group recognizes that with the changing demographics in Lawrence and Lowell, it is crucial that minority elders be a part of the organizing process. Yet some members of the group are resistant to providing "special" services (i.e., translation). There is racism in some remarks that have been made by older planning committee members. The division between Latino, South East Asian and Anglo elders in the Merrimack Valley remains very pronounced.

This group is just beginning to deal with this issue. We are attempting to link with other coalitions and community groups such as the Merrimack Valley Project, the Mass Tenants Union, the Cambodian Mutual Assistance Association and the Latino Elder Outreach Program.

Balance a wide view with a focused attack - Get help!

Part of our lack of effectiveness has been our inability to be all things to all people and our stubborn insistence that we should be. We have used the group's energy to set up and run community meetings across the Merrimack Valley. Because we have spread our energies so thin, we have been unable to go in depth in any one

area. The group is now shifting its focus to more targeted community organizing. We are also pursuing a student internship position to help with the coordination and administration of the advocacy and organizing events. We are also exploring teaming with other community organizing coalitions such as the Merrimack Valley Project, to gain their expertise and share the information we have gathered.

Community organizing begins with human development

As I mentioned in my descriptions of the legislative forums, a very puzzling thing happens to dynamic, outspoken people (especially older women) when they get in a room with a male authority figure. They get very polite and defer to the "authority figures" agenda. This was true for almost every person attending these legislative forums, they were unwilling to put the State legislator or Congressman "on-the-spot" with difficult questions.

We obviously need to work on this, beginning at home. I think we have to focus on building our own self assurance and then convey this to people in the community. They have to take hold of their personal power as a person and **as a person who votes!** The group also needs to get some leadership training - to then pass this on to elders in groups we are helping to organize.

2. A look toward the future

The Merrimack Valley Elder Partners while almost 10 months old is still just learning to walk. While we have gotten a lot done in the past months our underlying goal of true community organizing remains ahead of us.

In early January the group had one of its most productive meetings to date. We have decided to focus our energies on one area for the next 6 months and work on providing some in depth training to elders wanting to form advocacy/informational groups. We have finalized an action plan that while ambitious, seems much more manageable to the group.

Medicare, Medicaid, Social Security and the programs funded under the Older Americans Act (nutrition, nursing clinics....) are all under threat under the Congressional Agenda. The group seems more motivated by these impending threats, and we feel it is a critical time to, as Arnie says, "Don't mourn organize!"

3. Conclusion

The premise that is important to keep in mind is that CED has three words in its title. The economic development gets a lot of our time in this program, as it should be for many of us who are uninitiated in accounting and financing neopities. What I think we talk about, but don't really get hands on training in the "C" or Community component of CED. There is an assumption that everyone is well versed in Community organizing and I'm here to tell you that after 6 years of lobbying as part of my job, I still have mountains to learn about effective community organizing. I think it is vital that we **all** learn these skills. Because without a community, without people coming together, finding their voice and finding their power (individually and in groups), we're not going to be able to get to the ED part.

My project seems like a very small step in this community building and perhaps one that is difficult to see how the economic development piece ever will play a part. Yet I would argue that while these elders have not started their own Mondragon (YET!), they have taken a step toward that e-word, toward taking some control of their lives and ultimately their communities.