TURNING THE CORNER PROJECT OVERVIEW:

MONITORING NEIGHBORHOOD CHANGE TO PREVENT DISPLACEMENT

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INTRODUCTION

Turning the Corner: Monitoring Neighborhood Change to Prevent Displacement is a project guided by the Urban Institute's National Neighborhood Indicators Partnership (NNIP) and the Federal Reserve-Philanthropy Initiative. Launched in January 2016, the project piloted a research-to-action model to monitor neighborhood change, drive informed government action, and support displacement prevention and inclusive revitalization, focusing on neighborhoods in recovering and moderately strong housing markets. Local teams in Buffalo, New York; Detroit, Michigan; Milwaukee, Wisconsin; Phoenix, Arizona; and the Twin Cities (Minneapolis and St. Paul, Minnesota) conducted independent research to understand neighborhood change and displacement risk in their communities. Key design elements included qualitative and quantitative methods to capture various aspects of neighborhood change; exploration of various types of displacement, such as residential, cultural, and commercial; and practical application of research to urgent program and policy questions through local advisory groups.

This report first reviews the project's origins and structure. It then describes the teams, activities, insights, and focus neighborhoods for each site, based on project calls and local reports.

PROJECT ORIGINS

Turning the Corner was incubated by the Federal Reserve-Philanthropy Initiative, a collaboration between the Funders' Network for Smart Growth and Livable Communities' Restoring Prosperity in Older Industrial Cities Working Group and several Federal Reserve district banks. In 2013, the Federal Reserve-Philanthropy Initiative identified expanding resident movement in recovering cities as a pressing issue. Spurred by Karen Chapple's displacement research at the University of California, Berkeley, a planning team, consisting of staff at the Funders' Network, the Community Foundation for Southeast Michigan, the Federal Reserve Bank of Minneapolis, and the Ford Foundation, explored the potential for an expanded level of locally driven displacement research. They reached out to Urban Institute staff as coordinators of NNIP, a network of independent organizations in more than 30 cities that share a mission to help community stakeholders use neighborhood data for better decisionmaking, with a focus on working with organizations and residents in low-income communities. Urban Institute, as well as local NNIP partner Data Driven Detroit, soon joined the planning team. In 2016, The Kresge Foundation awarded the Institute a grant to design and manage the project, facilitate cross-site learning,

synthesize lessons from research in five cities, and develop guidance documents for other cities interested in similar research. A steering group guided the direction and monitored progress.

In fall 2016, collaborations from seven other cities responded to a call for applications to participate, of which four were selected (Buffalo, Milwaukee, Phoenix, and the Twin Cities). Selected sites were required to identify local direct or in-kind funding to support their activities. Because of varying timing for confirmation of the funding and organizational requirements, the work began at different times across projects, beginning in 2016 in Detroit and completing in spring 2019 in the Twin Cities.

PROJECT DESIGN AND PRODUCTS

The Urban Institute provided the participating sites research questions and a list of required project components, and then each site adapted the design based on local needs and context. One primary interest of the project was to make sure it supported local advocacy and decisionmaking, so the project required each site to identify an advisory committee of community stakeholders to ground their research and to represent the audience for their findings. Milwaukee used an existing entity to serve this purpose. The other four sites developed one or more groups to provide feedback on the project's design, findings, and implications. Community development organizations and foundations were represented in the advisory committees in every city. Representatives of advocacy organizations, city agencies, academia, and business associations also were included.

The sites chose neighborhoods with likely displacement risk, which are described in the site sections below, based on early quantitative analysis and qualitative impressions. Each site conducted qualitative research to gather information from the people experiencing change on the ground. This work included interviews with residents, business owners, and other neighborhood and city stakeholders; resident focus groups; and community meetings. Sites also conducted quantitative analyses of neighborhood change using data from national sources, such as the American Community Survey (ACS), as well as local administrative sources, such as building permits. Finally, three sites collected primary data: Buffalo (through a block-by-block windshield survey), Phoenix (through a Google Street View scan of business locations); and the Twin Cities (through an online resident survey).

Each site analyzed their data and produced a report, with key findings reviewed by their advisory committee. The sites then disseminated their findings to the broader community

through events and other publicity to have this research inform local action and policymaking. The Detroit and Phoenix teams also produced interactive websites to share their analyses.

Over the project period, the Urban Institute hosted cross-site webchats, facilitated sessions at the NNIP meetings, and conducted one-on-one conversations to promote peer learning and gather informal observations from the sites. To help other communities learn from the Turning the Corner experiences, the Urban Institute identified cross-site themes and recommendations summarized in two briefs and developed a set of resources to help other places conduct similar research.

TURNING THE CORNER CROSS-SITE PUBLICATIONS

Synthesis Briefs

- **Turning the Corner: Lessons from Five Cities on Displacement Risk in Changing Neighborhoods.** A brief providing lessons about displacement risk in recovering or moderately strong housing markets and recommendations for governments and the civic sector to ensure revitalization benefits longer-term residents.
- **Turning the Corner: Implications of Neighborhood Revitalization for Public Safety, Small Businesses, and Capital Investments.** A brief discussing three topics related to equitable development that emerged across the five sites.

Resources for Communities to Monitor Change

- **Guide to Measuring Neighborhood Change to Understand and Prevent Displacement.** A guide on data sources and methods for monitoring neighborhood change, drawn from the experiences of the Turning the Corner local research and from NNIP.
- **Turning the Corner Qualitative Toolkit on Neighborhood Change.** Protocols and related materials for conducting resident focus groups and business manager interviews about perceptions of neighborhood conditions and trends.
- **Turning the Corner Literature Catalog.** A listing of recent literature and projects on neighborhood change and displacement, categorized by topic and method.

SITE PROJECT DESCRIPTIONS

Each section below describes the organizations involved in each site's Turning the Corner collaborative, the research and engagement activities, the focus neighborhoods, and selected insights from the local work. Most of the material is drawn from the local reports. Since the sites used different data sources, indicators, and timeframes, the Urban Institute produced the tables with neighborhood characteristics in each section below to facilitate cross-city comparisons.

BUFFALO

The Center for Urban Studies at the University at Buffalo led the research, collaborating with the city's Urban Renewal Agency and Planning Department on engagement activities. The project was funded by the Ralph C. Wilson, Jr. Foundation in coordination with the Community Foundation for Greater Buffalo. The team focused on three neighborhoods facing diverse market conditions: the Lower West Side, Ellicott, and the Fruit Belt. The description of Buffalo's activities, focus neighborhoods, and research insights are drawn from Taylor, Silverman, and Yin (2018), supplemented by Urban Institute analyses of the neighborhoods in the table below.

Activities

The team initially conducted an analysis based on a gentrification typology (Bates 2013) of neighborhood conditions across the city to identify areas at risk of gentrification. They also conducted a windshield survey, which provided a census block–level visual assessment of the potential target neighborhoods. The team formed a panel of neighborhood-based stakeholders to review the findings and gather input on the final decision. A 16-member community advisory committee, including residents of each of the three focus areas, provided research oversight. The team conducted nine focus groups with 58 people starting in 2017 and ending in the first quarter of 2018. The team held focus groups in each neighborhood for each of the three groups of interest: homeowners, renters, and other stakeholders engaged in the neighborhoods, such as real estate professionals, staff from nonprofit organizations, service providers, and local business owners.

The Center for Urban Studies assembled fine-grained and multifaceted data to illuminate neighborhood changes. These included data at the census block group level on building permits, tax foreclosures, housing demolitions, housing sales, and subsidized housing, as well as city investments from the Community Development Block Grant Program and the HOME Investment Partnerships Program. The Buffalo team prepared a report and engaged stakeholders who participated in earlier stages of the project around next steps based on report recommendations. The authors produced two subsequent journal articles specifically on residents' and grassroots stakeholders' perceptions of residential displacement (Silverman et al. 2018 and Silverman et al. 2019).

Focus Neighborhoods

The three focus neighborhoods in Buffalo are located around downtown and within the boundaries of the Queen City Hub plan, which is intended to guide redevelopment and support downtown development. Key demographic and housing-related data for the three neighborhoods and the city overall are shown in table 1.

Table 1: Characteristics of the Buffalo Turning the Corner Focus Neighborhoods

	Lower West Side	Ellicott	Fruit Belt	City of Buffalo
Racial and Ethnic Composition				
Pct. White	32	2	8	44
Pct. Black	12	85	84	36
Pct. Asian	1	0	0	5
Pct. Native American	1	0	0	0
Pct. Other	0	0	0	0
Pct. Multi-racial	2	3	2	3
Pct. Hispanic	52	11	6	11
Housing and Income				
Vacancy Rate	13	29	35	16
Homeownership Rate	24	15	41	41
Pct. Single-family Homes	20	21	51	37
Pct. Paying More than 30% on Housing	48	47	41	38
Pct. Paying More than 50% on Housing	25	17	23	21
Pct. Households with Less than $35K in Income	62	78	66	51

Source: Urban Institute analysis of the 2012-2017 American Community Survey data.
Note: Local analysis may have used different sources and time periods, so values may differ from those in local publications.

The Lower West Side is west of downtown near the waterfront and is about 0.5 square miles. The neighborhood is predominantly Latinx with a large Puerto Rican population and has a sizeable white population. The main commercial strip, Niagara Street, has a mix of businesses, including a grocery store that serves a cross-section of residents. The proximity to redevelopment both downtown and along the waterfront has created housing market pressures. The neighborhood borders one of Buffalo's most expensive residential communities and Canalside, a major tourist attraction. Additional pressures on housing costs come from the expansion of D'Youville College, which borders the neighborhood. Low-income renters are particularly vulnerable to the effects

of development. The Buffalo team's analysis found that most census block groups in the neighborhood saw rent increases between 2000 and 2015.

Ellicott is located to the east of downtown Buffalo and is 0.3 square miles. The neighborhood historically was racially diverse until white suburbanization in the mid-20th century transformed it into a predominately black neighborhood with a large number of black homeowners at the time. Urban renewal in the 1960s significantly reduced the number of housing units. The low-density neighborhood has a mix of public housing residents and homeowners. It has the highest percentage of households making less the $35,000 annually (78 percent) of the three neighborhoods. There is a large amount of vacant land. The main commercial strip is Jefferson Avenue with a mix of businesses, including a pharmacy, food businesses, and other small stores that serve a cross-section of residents. The other commercial strip is Broadway. Ellicott is located within and near multiple investment areas, including the Central Business District and a large-scale, mixed-use development project called Harborcenter. The neighborhood's proximity to downtown and its concentration of low-income households make the neighborhood attractive to investors and developers, which increases the risk of resident displacement.

The Fruit Belt is north of downtown and is the largest of the Buffalo target neighborhoods at 0.6 square miles. The neighborhood is predominantly black. The housing stock is diverse, consisting of both single- and multifamily homes. The Buffalo team indicates that the neighborhood has lost nearly 7,000 residents since 1970, and as of 2015, the population was just over 2,000. It has the city's highest rate of vacant and abandoned properties. The main commercial strip in the neighborhood is Jefferson Avenue. Businesses there include small stores that serve a cross-section of residents. Michigan Avenue is another commercial strip, close to the Buffalo Niagara Medical Campus. Given its location just east of the expanding medical campus and northeast of the Central Business District, the Fruit Belt is poised to be affected by the growth of both districts. Per the Buffalo team, between 2000 and 2015, the number of neighborhood residents with college degrees and the median household income have increased. Against the backdrop of these changes, St. John Baptist Church built 28 units of affordable rental housing in 2007 and another 49 units in 2013 and community activists are working to establish a community land trust.

Local Insights

The Buffalo team defined a process of "residential upgrading" with key indicators of neighborhood change (Taylor, Silverman, and Yin 2018). They found that residential upgrading and increased market demand were occurring unevenly across the city. There was mixed evidence of accelerating housing prices in the focus neighborhoods. In 9 of the 12 census blocks where data were available, the Buffalo report found home values that exceeded the city median. Rents remained below the citywide median, but many residents are paying more than

30 percent of their incomes on rent. To the extent that there was residential upgrading, the Buffalo team highlighted patterns of neighborhood improvement that might be driving the process. Data on building permits, demolitions, and tax foreclosures on the Lower West Side suggest a connection to the accelerating housing market in that neighborhood. But in some neighborhoods, such as the Ellicott neighborhood, the presence of subsidized housing and housing choice vouchers might have slowed neighborhood change.

In the focus groups, Fruit Belt residents spoke about weakening connections among neighbors and a less welcoming environment for families, signaled by the new apartment developments with only one- or two-bedroom units. They also saw the city investments in upgrading streets or demolishing housing but not in the improvements to the community center that serves neighborhood youth.

The findings led Buffalo to recommend the development of an early-warning system to identify areas with an increasing risk of residential displacement. In their report, they suggest policies to reduce the displacement of low-income residents and call for a more active city government role in development of the lowest-demand areas. The civic conversation about options for policy and practice benefits from broad community involvement and will continue beyond the Turning the Corner project.

DETROIT

Data Driven Detroit (D3), an NNIP partner, directed the research and engagement in Detroit and assisted with the project's national design and development. The project was funded by the Community Foundation for Southeast Michigan, the Hudson-Webber Foundation, The Skillman Foundation, and the John S. and James L. Knight Foundation. The team selected the North End, next to the revitalized Midtown district, and Southwest Detroit, home to Mexicantown and adjacent to the growing Corktown neighborhood, for the project. The description of Detroit's activities, focus neighborhoods, and research insights are drawn from Quesnelle, Rubio, and Urban (2019), supplemented by Urban Institute analyses of the neighborhoods in the table below.

Activities

The Detroit team's quantitative work started with the construction of criteria to exclude areas that had a small residential population, that had already undergone transformational neighborhood change, or that were historically high income and stable. D3 conducted conversations with more than 60 people through interviews and three focus groups. One focus group was held in the North End, and two were held in Southwest Detroit. Focus groups

discussed changes in population, businesses, and the built environment over the past five years to identify the changes taking place and the order in which they occurred.

D3's quantitative analysis focused on identifying neighborhoods with conditions that made them more vulnerable to neighborhood change in response to catalysts. D3 constructed a dataset with multiple indicators at the block level, including building permits, tax foreclosures, number of occupied and vacant addresses, blight violations, water shutoffs, rental properties, home sales data, and speculator-owned properties. D3 completed a factor analysis on 18 variables from their dataset, producing five groupings of variables: social advantage, housing stability, crime, business, and protective activities. From these groupings, they created five individual indexes and one summary Neighborhood Change Index. They also experimented with a predictive model of neighborhood change, but the model was not viable. Data from their two point-in-time citywide parcel surveys, which they intended to include, were not sufficiently comparable (the Detroit Residential Parcel Survey and Motor City Mapping).

D3 convened a community advisory group to shape the research questions and review a draft report. They summarized the quantitative and qualitative analyses in a final written report, supplemented by an interactive mapping tool displaying the block-level indexes. For simpler access, the Turning the Corner Data Explorer tool and how-to guide allows users to look up their specific blocks of interest. D3 held a public discussion on the data from the report with residents and other community organizations and may pursue additional opportunities to communicate their findings.

Focus Neighborhoods

Community members and stakeholders suggested the two neighborhoods as places experiencing neighborhood change. Both are close to neighborhoods in Greater Downtown Detroit that have experienced neighborhood change in recent years. Key demographic and housing-related data for the two neighborhoods and the city overall are shown in table 2.

Table 2: Characteristics of the Detroit Turning the Corner Focus Neighborhoods

	Southwest	North End	City of Detroit
Racial and Ethnic Composition			
Pct. White	20	10	10
Pct. Black	19	84	79
Pct. Asian	0	0	2
Pct. Native American	0	0	0
Pct. Other	0	0	0
Pct. Multi-racial	1	2	2
Pct. Hispanic	59	2	8
Housing and Income			
Vacancy Rate	23	40	29
Homeownership Rate	52	34	48
Pct. Single-family Homes	72	52	73
Pct. Paying More than 30% on Housing	36	44	43
Pct. Paying More than 50% on Housing	19	26	25
Pct. Households with Less than $35K in Income	59	66	59

Source: Urban Institute analysis of the 2012-2017 American Community Survey data.
Note: Local analysis may have used different sources and time periods, so values may differ from those in local publications.

The North End is 6.5 square miles and is north of downtown and the Midtown neighborhood. Its eastern border is shared with two municipalities that operate separately from the City of Detroit: Highland Park and Hamtramck. As shown in Table 2, the neighborhood is predominately black. A third of housing units are owner-occupied, and nearly half the housing units are in multifamily structures. Woodward Avenue, a rebounding commercial corridor, bisects the neighborhood, with a concentration of vacant units in the areas to the east. Wayne State University is in the neighborhood, and the new Detroit QLine light rail runs to the southern border of North End, with the possibility of extending further north.

The neighborhood has been the focus of several community and economic development efforts, including the public-private partnership North End Neighborhood Investment Strategy from 2012 to 2014 supported by the city, Wayne State University, The Kresge Foundation, and The Skillman Foundation. The North End neighborhood has experienced economic pressures from development in the rapidly growing adjacent Midtown neighborhood. In addition, the city plans to expand the Delores Bennett Park, currently 2.7 acres just south of the neighborhood, to as much as 30 acres. Longtime North End residents have expressed concern that the park is being pulled from local control and that new, high-income residents are strongly influencing the expansion.

Southwest Detroit is located in the city's southwest corner. At 14.7 square miles, it is bordered on the east by the Detroit River. Southwest has been the historical landing place for Latinx immigrants. Per Urban's analysis of 2017 ACS data, Latinx people make up most of the population, with the remaining population split between white and black residents. Southwest is divided evenly between owner-occupied and renter-occupied housing. Most housing units are in single-family structures. The neighborhood has a lower vacancy rate than the North End neighborhood. The neighborhood's commercial strip, known as Mexicantown, is home to many Mexican-owned restaurants and businesses.

A $6.4 million renovation of the streetscape in the West Vernor area of the neighborhood was recently completed. The neighborhood has experienced economic pressures from development in the rapidly growing, adjacent Corktown neighborhood, just west of downtown. Development pressures include risks of rent increases, condominium conversions, expiring affordable housing properties, and property tax increases.

Local Insights

D3's Neighborhood Change Index summarized 18 block-level indicators to reveal new patterns of risk of neighborhood change in a manner that was easily comprehended by a lay audience. The conceptual groups of social advantage, housing stability, crime, business, and protective activities reflect the need to consider different aspects of neighborhood change. Fourteen of the indicators are updated at least quarterly, laying a foundation for tracking change going forward. The team hopes that investors, city officials, nonprofits, and foundations will use the tool and index to examine and consider strategies for reducing displacement risk when exploring investments.

The Detroit team used the qualitative data they collected to add nuance to their quantitative results. The residents articulated their experience of changes in social fabric and neighborhood culture. They highlighted the creative problem solving that neighbors engaged in during times of

economic insecurity and absence of services. Solutions such as hyperlocal housing associations, coalitions, and immigrant-driven business corridors created a tight-knit community. Residents saw new investment from outside the neighborhood as a threat to the social networks they had developed. The focus groups also shed light on changes in the numeric indicators. For example, the rise in blight violations might reflect changes in the number of actual violations, but some residents believed there had been increased reporting of problems by new neighbors who appear to hold stricter standards for property conditions and maintenance.

Resident perceptions of policing and public safety trends also guided the interpretation of the crime data. In conversations with residents of the Southwest neighborhood, where reported crime increased, residents' responses complicated the typical narrative of crime as it relates to neighborhood change. They connected the opening of bars and restaurants and resultant late-night activity with rising property crime. They indicated that influxes of wealthier residents with different norms around safety may be driving changes in policing that are leading to the increased crime rates. For example, residents reported that an increased police presence in Southwest Detroit meant more drivers were being stopped and longer-term residents felt like new residents were more likely to call the police. Consequently, residents' friends and family who are undocumented immigrants avoid more developed parts of the commercial corridor. These insights elevated the discussion of crime rates into a richer discussion of how the reality and experience of safety shift as neighborhoods change.

MILWAUKEE

Data You Can Use, a nonprofit organization and the NNIP partner for Milwaukee, led the research and engagement activities. Milwaukee's Community Development Alliance (CDA) sponsored the Milwaukee Turning the Corner work, and the CDA program committee was the community advisory committee. Partners in the project work include the Greater Milwaukee Committee's MKE United, Local Initiatives Support Corporation (LISC) Milwaukee, and the Department of City Development. The project was supported by the Greater Milwaukee Foundation, the Northwestern Mutual Foundation, and the Zilber Family Foundation. The work was implemented in coordination with the city's Equity through Transit-Oriented Development (TOD) grant from the US Department of Transportation and a grant to Data You Can Use to explore expanded indicators of neighborhood change, called "Beyond Market Value." For Turning the Corner, the advisory committee focused on two historically significant neighborhoods next to downtown that are perceived to be gentrifying: Brewer's Hill and Walker's Point. The description of Milwaukee's activities, focus neighborhoods, and research insights are drawn from Pritchard and coauthors (2019), supplemented by Urban Institute analyses of the neighborhoods in the table below.

Activities

in consultation with the CDA members, the team at Data You Can Use selected the two focus neighborhoods because they have been the target of direct investment, had spillover effects of downtown development, and overlapped with the TOD grant study area. The team collected qualitative data in the Walker's Point and Brewer's Hill neighborhoods through interviews with business owners and focus groups with residents. All interview and focus group participants had lived in their respective neighborhoods for at least five years. The team also interviewed city policymakers to place the neighborhood information in the context of broader city changes. Along with the interviews, the team developed a photojournal of landmarks mentioned in the interviews. The summary of findings from the qualitative work was presented to and vetted by business owners, residents, and the neighborhood association members who participated in the research. In addition, the team consulted with the city planning department on the city's "A Place in the Neighborhood: An Antidisplacement Plan for Neighborhoods Surrounding Downtown Milwaukee," released in February 2018.

The team incorporated quantitative data from MKE United, the Milwaukee Department of City Development's TOD grant, and data from the antidisplacement plan regarding racial and economic changes. Their report also reviews indicators from a gentrification typology (Bates 2013), adapted based on suggestions from interview respondents and information drawn from a literature review. The TOD data came from national consultants who worked with the city to conduct a market and affordability study of the areas adjacent to the installation of a new streetcar, its projected extension, and a half-mile radius, including Brewer's Hill and Walker's Point. Data You Can Use incorporated the TOD project's quantitative analysis of the economic and racial and ethnic changes in Walker's Point and Brewer's Hill. The team reported to members of the advisory team every other month, shared quarterly updates with the broader community, and presented initial findings to the group in 2018. Data You Can Use summarized the quantitative and qualitative analysis into a final report (Pritchard et al. 2019). Going forward, the CDA will enable ongoing exchange among various initiatives relating to displacement, and Data You Can Use will continue to provide data assistance services for the community as part of its overall mission.

Focus Neighborhoods

To best complement other work going on in Milwaukee, the advisory committee selected two historically significant neighborhoods, Brewer's Hill and Walker's Point, that were identified as gentrifying. Both neighborhoods are adjacent to neighborhoods that are the sites of planned investments, including MLK, Bronzeville, Harambee, and the Harbor District. Key demographic and housing-related data for the two neighborhoods and the city overall are shown in table 3.

Table 3: Characteristics of the Milwaukee Turning the Corner Focus Neighborhoods

	Brewer's Hill	Walker's Point	City of Milwaukee
Racial and Ethnic Composition			
Pct. White	58	35	36
Pct. Black	29	7	38
Pct. Asian	2	4	4
Pct. Native American	0	1	0
Pct. Other	0	0	0
Pct. Multi-racial	4	2	3
Pct. Hispanic	7	52	18
Housing and Income			
Vacancy Rate	7	20	11
Homeownership Rate	33	36	42
Pct. Single-family Homes	25	37	46
Pct. Paying More than 30% on Housing	43	42	43
Pct. Paying More than 50% on Housing	17	25	22
Pct. Households with Less than $35K in Income	36	52	46

Source: Urban Institute analysis of the 2012-2017 American Community Survey data.
Note: Local analysis may have used different sources and time periods, so values may differ from those in local publications.

Brewer's Hill, once the home of the Beer Barons that made Milwaukee famous, is north of downtown and bordered by the Milwaukee River. Data from the HR&A analysis for the transit study indicate that the population of the greater Brewer's Hill area is about 20,000, comprising 9,000 households. It is a neighborhood of young white and Latinx residents and predominantly older African Americans. Per the Milwaukee team, between 2000 and 2015, the black population fell by 1,200 while the white population grew by 2,300. The area has a higher percentage of households at or below the federal poverty level (33 percent) in 2015 than the

city as a whole (25 percent), though the city's percentage also reflects a drop from what it was in 2000 (36 percent).

As shown in Table 3, the housing stock consists of single-family homes and duplexes, and the neighborhood has a high share of homeowners. The HR&A analysis mentions locally owned beauty stores and barbershops but notes the neighborhood otherwise lacks businesses that provide neighborhood services. Focus group members and individual interviews, however, suggested great pride in the growing number of eateries and the grocery store. Portions of the neighborhood are designated a local and national historic district, and residents report growing interest from investors in purchasing and renovating homes.

Walker's Point, the home of one of the city's three founders, is separated from downtown by a major highway to the north. It has a higher share of Latinx residents than the rest of the city. The 2017 ACS data indicates that it has a higher percentage of households making under $35,000 annually than Brewer's Hill. The area includes industrial sections but has pockets of single-family and duplex housing. The neighborhood also is home to entertainment corridors, such as 5th Street, with upscale retail, bars, and restaurants. Recently, this area has seen some condo, office, and retail development of formerly industrial properties, and the investments have spilled over the Milwaukee River and into the neighborhood. Neighborhood assets include proximity to downtown, a strong neighborhood organization, and an involved alderman.

Local Insights

The Milwaukee team sought to deepen the discussion of neighborhood change and gentrification to generate options for displacement prevention and inclusive revitalization. They framed their analysis by noting the complexity of displacement. For example, people have varying definitions of such terms as *diversity* and *gentrification*. Neighborhood change may be hyperlocal and not be captured by data at the census tract level. In addition, changes reflected in data do not always align with the changes residents and business owners see.

The team found that the two focus neighborhoods were changing in ways or at rates that differed from changes in the city as whole and from each other. The team chose key indicators of gentrification (percentage of the population that is white and percentage of adults with a college degree) and displacement risk (percentage renter housing burden and percentage homeowner housing burden), based on other studies and their qualitative work. These data show differences between the neighborhoods and the city and differences between the two areas themselves. The team found that, between 2000 and 2015, the Brewer's Hill neighborhood had a higher percentage-point increase in the white population (a 31.8 percentage-point increase) and population with a college degree (a 23.3 percentage-point increase) than the

city as a whole (a 3.7 percentage-point decrease and a 5 percentage-point increase, respectively). The percentage of households that were cost burdened remained flat for renters and increased only slightly for homeowners.

The Walker's Point neighborhood also had a higher percentage-point increase in population with a college degree (13 percentage points) than the city while it had a greater percentage-point *reduction* in the white population (12.8 percentage points). The neighborhood had a higher percentage-point increase in housing-burdened renters compared with the city as a whole (a 33.6 percentage-point increase versus a 16.3 percentage-point increase, respectively), though it experienced a 25.3 percentage-point decrease in housing-burdened homeowners compared with the city's 14 percentage-point increase.

Focus group discussions reflected participants' perspectives that neighborhood change either was not occurring or was occurring slowly in the focus neighborhoods. Many residents, however, expressed fear of the potential for significant change to happen quickly, indicating that ongoing data monitoring (particularly measures that are updated frequently) could be beneficial.

Based on analyses, the Milwaukee team focused on how to proceed with engagement, data and information, and displacement mitigation. The team recommends focusing on factors that lessen fears around displacement and mitigate actual displacement; incorporating less traditional indicators of neighborhood change, such as class, wealth, and occupation, along with those often used, including race or ethnicity, income, and education; and looking at hyperlocal-level change indicators identified by community members. They also call for deeper conversations about gentrification and diversity and for engagement of community members in authentic ways.

PHOENIX

LISC Phoenix supported the Turning the Corner engagement and qualitative research, and the Arizona State University (ASU) Center for Real Estate Theory and Practice led the quantitative research. Primary funding was provided by two local foundations—Vitalyst Health Foundation and the Arizona Community Foundation—with supplemental in-kind contributions from research partners. The Turning the Corner research project focused on four transitional neighborhoods: Eastlake, Garfield, West Camelback, and Glendale. The description of Phoenix's activities, focus neighborhoods, and research insights are drawn from a report by Arizona State University (2019), supplemented by Urban Institute analyses of the neighborhoods in the table below.

Activities

In summer 2017, LISC Phoenix assembled its Turning the Corner team and developed a nine-member, cross-sector steering group that regularly met to help inform the project. Additional neighborhood leaders were added as the project evolved. The group selected three focus neighborhoods in Phoenix that had stations on the greater Phoenix light-rail line and were perceived to be susceptible to displacement pressures. A fourth focus neighborhood (Glendale) was slated for a light-rail station at the time of the project launch and was included in the study as the example of neighborhood conditions before light-rail. During the study, the proposed Glendale's station was voted down by the city council.

In Camelback, Garfield, and Eastlake, LISC staff convened several meetings with residents, multiple conversations with neighborhood organizations, an information luncheon with city stakeholder organizations, and interviews with neighborhood business owners. These interactions included a wide range of perspectives of longtime and more recent community residents. The team decided not to conduct qualitative research in Glendale after the expansion was cancelled, though it was included in the quantitative research.

For the quantitative analysis, the ASU team compiled and analyzed 20 countywide datasets on housing, social, and economic conditions from the ACS, the local assessor's office, the Multiple Listing Service, and the Maricopa Association of Governments. The team used Google Street View data to identify all the businesses in the focus neighborhoods, supplementing data from the Maricopa Association of Governments' survey of businesses with five or more employees.

The findings from the research were compiled into a final report, which was vetted by the steering group and neighborhood stakeholders. The team also developed an ArcGIS story map, "Monitoring Neighborhood Change for Action: A Phoenix Case Study," which describes the targeted neighborhoods and key indicators of neighborhood change. The map is a user-friendly, visual way for neighborhood residents, government officials, and community members to assess neighborhood shifts in targeted areas. The team presented the story map to neighborhood leaders and have planned additional learning sessions.

LISC is working with a communications consultant to develop a strategy to build greater awareness in greater Phoenix about neighborhood change and displacement risk. In 2019, Phoenix will share its research findings, pursue strategic responses, work to build neighborhood capacity, and identify ways to spur neighborhood change conversations.

The Turning the Corner project provides baseline measures for continuing to monitor the three focus neighborhoods. The advisory board plans to continue being a hub for sharing

opportunities about local advocacy opportunities and national best practices for equitable development. Such an ongoing coalition can quickly engage when opportunities arise for influencing development, such as around the proposed southern extension to the light-rail line.

Focus Neighborhoods

The Turning the Corner research project focused on four transitional neighborhoods—three on the light-rail line (Eastlake, Garfield, and West Camelback) and one designated at the time for rail extension (Glendale). Key demographic and housing-related data for the four neighborhoods and the city overall are shown in table 4.

Table 4: Characteristics of the Phoenix Turning the Corner Focus Neighborhoods

	Eastlake	Garfield	West Camelback	Glendale	City of Phoenix
Racial and Ethnic Composition					
Pct. White	50	16	31	36	43
Pct. Black	9	5	11	8	7
Pct. Asian	1	0	6	5	4
Pct. Native American	10	2	6	1	2
Pct. Other	0	0	0	0	0
Pct. Multi-racial	1	1	2	3	2
Pct. Hispanic	28	75	44	46	42
Housing and Income					
Vacancy Rate	9	14	14	18	11
Homeownership Rate	13	29	27	46	53
Pct. Single-family Homes	19	60	35	48	65
Pct. Paying More than 30% on Housing	44	45	46	30	34
Pct. Paying More than 50% on Housing	18	21	23	13	16
Pct. Households with Less than $35K in Income	59	60	58	43	33

Source: Urban Institute analysis of the 2012-2017 American Community Survey data.
Note: Local analysis may have used different sources and time periods, so values may differ from those in local publications.

Located in central Phoenix, Eastlake Park is 0.5 square miles. It has been home to many civil rights rallies, has had visits from civil right leaders, and has been the starting point of all civil rights marches to the Capital. As shown in Table 4, African Americans and Latinx residents each account for about one-quarter of the residents in Eastlake. More than 80 percent of households are renters, with single-family homes accounting for only a fifth of the housing stock. Its total population of about 1,600 is smaller than the other neighborhoods in the project. The neighborhood is home to businesses, educational institutions, and churches effecting social change. Phoenix identified Eastlake as a Choice Neighborhood and invested in significant neighborhood planning and redevelopment of a large park and recreation green space. The community has also developed a strong and well-organized neighborhood association that works with the city and nonprofit developers. Eastlake, along with Garfield and West Camelback, is part of the City of Phoenix's Reinvent PHX TOD policy plan to create walkable, opportunity-rich communities connected to light-rail. The plan's goals focus on historic preservation, strong local businesses, active lifestyles, and housing diversity.

Established in 1883, centrally located Garfield is 0.7 square miles. It is one of the city's oldest neighborhoods; most houses were constructed from the 1890s to the 1930s. As the city grew, investment and services moved to new suburbs, and Garfield began to deteriorate. Urban analysis of 2017 ACS data indicates, most Garfield residents are Latinx. About two-thirds of households rent their homes. Since the 1980s, Garfield residents have worked for many years to revitalize the neighborhood and preserve its historic roots. In 2005, residents successfully advocated for the city to list Garfield on the Historic Property Register. The neighborhood includes several retail corridors and a growing number of small businesses. Garfield is in the footprint of an expanding ASU campus.

West Camelback is north of downtown and is 1.5 square miles. As shown in Table 4, most residents are Latinx, but the area has a large white population. Almost 70 percent of the housing stock is rental housing. Multifamily housing properties are close to main roads, with single-family housing concentrated in the interior blocks. Much of the area around the 7th Avenue and Camelback Road light-rail station is rental properties. Its western area is characteristic of historic car-centric development patterns in many parts of Phoenix. Suburbanization from the 1950s through the 1990s resulted in expansive retail, commercial, and housing development, including affluent residential communities and shopping centers. Portions of Camelback declined, and strip malls now line the major roads (15th Avenue, Camelback, and 7th Avenue). The 2008 opening of the light-rail station, one of the largest in the city, sparked contentious discussions about the impact of transit on neighborhoods, especially in older Camelback residential areas and retail centers. The city enacted special development standards focused on the 7th Street

commercial corridor that emphasize support for local businesses, pedestrian-friendly development, and revitalization.

Glendale is outside the City of Phoenix, to the northwest of the Camelback neighborhood. Almost half the neighborhood's population is Latinx, as shown in Table 4. Relative to the other focus neighborhoods, Glendale has the highest percentage of owner-occupied housing units. Glendale had a thriving commercial corridor with major auto dealerships until the early 2000s, when the auto dealers left and were replaced by used auto sellers. The departure of the anchor dealerships drained energy from the neighborhood, which made it difficult to attract new economic activity. The neighborhood was included in plans for a light-rail expansion, which is why it was initially selected for the Turning the Corner study.

Local Insights

The team in Phoenix found that the pace of change in the housing markets seemed slow to observers. Of the three Phoenix focus neighborhoods where light-rail stops opened in 2009, only one area experienced significant rent increases from 2000 to 2015, while the other two showed modest increases. Surveys of residents who attended neighborhood meetings found that many respondents perceived no displacement among their neighbors over the past decade. The light-rail potentially had less impact on neighborhood housing values because it does not extend to major job centers and, according to the qualitative research, few residents reported using transit. This slower pace of change was welcomed as an opportunity to monitor future development and advocate for doing future development in ways to benefit longer-term residents.

Phoenix's data work developed a unique dataset for area businesses. The team originally used business data from the Maricopa County of Governments but found that the data did not include businesses with four or fewer employees. This led them to develop a Google Street View protocol to identify businesses, which, for some blocks, more than doubled the number of businesses. This insight highlights the value of being able to collect new primary data at the local level.

THE TWIN CITIES

LISC Twin Cities is the community engagement and administrative lead for the grant from the McKnight Foundation. The NNIP partner Center for Urban and Regional Affairs (CURA) at the University of Minnesota, directed the quantitative research, and Wilder Research managed the qualitative research. The Federal Reserve Bank of Minneapolis (in addition to serving on the national project steering committee) participated in the advisory group convening and helped

compile the final report. The Twin Cities team selected three neighborhoods that represent distinct types of market pressures related to displacement: Whittier and Near North/Jordan in Minneapolis and Dayton's Bluff in St. Paul. The description of Twin Cities activities, focus neighborhoods, and research insights are drawn from the 2019 *Turning the Corner in the Twin Cities report*, supplemented by Urban Institute analyses of the neighborhoods in the table below.

Activities

Independent of Turning the Corner, CURA completed a study in 2017 on gentrification analyzing information on housing markets and building permits to assess the changes across Minneapolis and St. Paul neighborhoods. They also interviewed residents and stakeholders to test whether the qualitative perspectives matched their quantitative analysis (http://gentrification.umn.edu/). Given this earlier work, the Turning the Corner team designed their Turning the Corner project to explore early indicators of gentrification and identify potential interventions to address displacement. To select the focus neighborhoods, CURA used a modification of the Bates gentrification typology (Bates 2013) to identify candidate tracts and then worked with their advisory group to finalize the selections.

The Wilder Research team conducted 22 interviews across the three neighborhoods to hear about concerns related to gentrification and changes community members noticed in housing, commercial spaces, culture, and relations between longer-term and newer residents. Interviews also gathered perspectives on the local, regional, and national policy responses that might mitigate negative impacts of gentrification. The team presented findings to two advisory groups with representatives from local government, neighborhood organizations, and community economic development groups in April 2018. Wilder Research staff also conducted an online survey that was designed to be representative of households in the three study area neighborhoods, which focused on resident attitudes about neighborhood change and gentrification

In June 2018, the Turning the Corner research team presented policy recommendations to the advisory group and state, regional, and local policymakers and gathered feedback. Project advisers suggested prioritization of strategies that mitigate residential displacement; bipartisan approaches that take into consideration the needs of developers and landlords; efforts to make more city, county and state administrative data publicly available; more highlighting of best practices across the U.S. that could be replicated in the Twin Cities. Team members from the Federal Reserve Bank of Minneapolis are assembling promising policy and program options based on the local interviews and a scan of approaches taken in other cities.

The final report will be shared with the advisory group members, local and state policymakers and will be publicly posted on the project partners' websites.

Focus Neighborhoods

The early quantitative analysis of housing and household characteristics identified three focus neighborhoods as areas susceptible to or in the beginning stages of gentrification. Demographic and housing-related data for the three neighborhoods and the city overall are shown in table 5.

Table 5: Characteristics of the Twin Cities Turning the Corner Focus Neighborhoods

	Whittier	Near North/ Jordan	Dayton's Bluff	Twin Cities
Racial and Ethnic Composition				
Pct. White	59	15	19	57
Pct. Black	13	54	20	17
Pct. Asian	7	17	43	11
Pct. Native American	1	1	2	1
Pct. Other	0	0	0	0
Pct. Multi-racial	4	6	4	4
Pct. Hispanic	16	7	12	10
Housing and Income				
Vacancy Rate	9	8	10	6
Homeownership Rate	14	41	55	48
Pct. Single-family Homes	8	63	59	50
Pct. Paying More than 30% on Housing	46	51	43	36
Pct. Paying More than 50% on Housing	23	29	20	17
Pct. Households with Less than $35K in Income	47	49	38	34

Source: Urban Institute analysis of the 2012-2017 American Community Survey data.
Note: Twin Cities column contains combined values for Minneapolis and St. Paul. Local analysis may have used different sources and time periods, so values may differ from those in local publications.

Whittier is 0.4 square miles and is one mile south of downtown Minneapolis. As shown in Table 5, most Whittier residents are white. More than 80 percent of households rent, and more than 90 percent of the housing stock is multifamily units. Of the neighborhoods identified for this project, median monthly rent in 2016 was lowest here, at around $800. The neighborhood has some of the city's oldest homes, many of which have been restored. There has been an increase in rental properties and an increase in cultural diversity. Residents come from more than 30 nations, which is reflected in the cuisine, shops, and experiences in the area. The neighborhood is locally famous for the Nicollet Avenue commercial corridor, known as "Eat Street." Additional commercial corridors—Lyndale Avenue, Franklin Avenue, Lake Street, and 26th Street—are shared with other neighborhoods. Whittier has been a center for the arts and artists in Minneapolis for around 100 years and is home to the Minneapolis Institute of Arts, the nationally award-winning Children's Theater, and the Minneapolis College of Art and Design. Fueled by the area's amenities and the proximity to downtown, the areas of Whittier selected for study were in the early stages of gentrification.

The Near North/Jordan neighborhood is a predominately residential area northwest of downtown Minneapolis near the Wirth Parkway (along the edge of Minneapolis and suburban Golden Valley). The area is 0.6 square miles. More than half the neighborhood's residents are African American. Most of the housing stock in Near North/Jordan is single-family units, and the homeownership rate is 41 percent. Commercial corridors include West Broadway and Penn Avenues, which have seen recent mixed-use development. West Broadway is also the planned route for a light-rail expansion. Community and neighborhood groups lead efforts to address community safety and policing and strengthen community assets (e.g., community kitchen, gardens, and events such as an annual arts and culture festival called FLOW Northside Arts Crawl). Hit by the mortgage foreclosure crisis and a destructive tornado, the area has been slower to recover than other parts of the city.

Home values are rising, however, as speculators buy houses and turn them into rental properties, for which demand is high because of a tight rental market. Major investments are happening in both neighborhoods, including the county-operated Federally Qualified Health Center NorthPoint Health and Wellness Center, Thor Construction Headquarters (the largest African American–owned construction firm in the United States), new multifamily residential and mixed-use development along West Broadway and Penn Avenue, and a new bus rapid transit route along Penn Avenue, which will connect to a proposed light-rail train extension (the Blue Line LRT corridor extension to the Bottineau neighborhood). These area's proximity to downtown and the first-ring suburbs make them susceptible to gentrification and increased risk of displacement of longer-term residents.

Dayton's Bluff, 0.3 square miles, is northeast of downtown St. Paul, bordering the Mississippi River. The neighborhood is predominately Asian, as shown in Table 5. Dayton's Bluff has a larger share of owner-occupied units than the Near North/Jordan neighborhoods. Of the three neighborhoods, it has the lowest percentage of households making under $35,000 annually. The neighborhood also includes recreation centers, food markets, businesses, social service organizations, and a federally qualified health care center. Dayton's Bluff is a working-class neighborhood, with a large amount of affordable housing. It has a large section of undeveloped land owned by the Saint Paul Port Authority. The neighborhood is beginning to see investment to the west, with a new senior housing development, a cooperative grocery store (Mississippi Market), and a hub of nonprofit and social service buildings (East Side Enterprise Center and CLUES). Cultural and arts organizations have recently established in the area to serve the increasingly diverse community. Real estate investors have begun purchasing adjacent commercial and residential properties for redevelopment.

Local Insights

The Twin Cities team's analysis of quantitative and qualitative data found considerable change in the three focus neighborhoods. Median gross rents increased from 2000 to 2016 by large margins in the two neighborhoods identified as being susceptible to gentrification, Near North/Jordan and Dayton's Bluff. Median gross rent also increased in Whittier, the neighborhood deemed actively gentrifying, though by not as much. Median home sales prices increased between 2012 and 2016 in each of the neighborhoods. There also has been a change in businesses marked by a shift from industrial to health, education, and retail amenities. This change affects the services and shopping opportunities in the neighborhoods and the types of available jobs. Some of this shift has happened already, and redevelopment plans indicate additional changes along these lines will come about.

The team found that median household income increased in Dayton's Bluff and decreased in the other two neighborhoods. Regardless of the direction of change in median income, community members across the three areas commented on the activities and behaviors of newer residents. There has been an increase in activities ranging from bicycling to joining neighborhood associations. Some community members also commented on what they considered unnecessary calls to police.

Neighborhood leaders and residents expressed concern that developers were consolidating ownership of parcels for residential and commercial redevelopment. Such consolidation could lead to large-scale redevelopment that changes the neighborhoods quickly or slows the pace of change, if an owner waits for opportunities of interest to them. Rather than change occurring

property by property, the concern is that it can happen wholesale in line with developers' interests and visions.

The concern about parcel consolidation and other changes are tied to discussions of displacement. Community members, including business owners, talked about families and businesses that have left because of rising property costs and turnover in ownership. They also discussed changes in neighborhood character and feeling disconnected from people, new businesses, and a sense of place. Along with spatial and cultural displacement, some people said there has been a loss of political power as social connections have changed. The report notes the importance of efforts to elevate the voices of indigenous and communities of color.

The team found that community concerns generally track visible changes, though changes may occur before they become evident to residents. Quantitative data might serve as early indicators of change. To be able to consider options for addressing displacement concerns, the team calls for more and better data to monitor neighborhood-level change.

The team also suggests prioritizing strategies to reduce residential displacement (over other types of displacement) as low-income renters face the greatest risks, and a need for regional approaches to address the challenges associated with neighborhood redevelopment.

CONCLUSION

The five teams that participated in Turning the Corner developed new insights blending quantitative analysis and resident perceptions that will inform their local conversations about how to influence neighborhood revitalization to prevent displacement of longer-term residents and businesses. As locally embedded institutions, the team members will continue to explore their roles individually and collectively in making progress toward equitable development in their communities. Their research also illustrates the varying ways that risks of displacement can manifest itself in places with recovering or moderate-strength housing markets.

Each site adapted the Turning the Corner research model to fit its local needs and context. We hope their examples will benefit other places struggling with similar issues. The national institutions that led this project—the Restoring Prosperity in Older Industrial Cities Working Group of the Funders' Network for Smart Growth and Livable Communities, the Federal Reserve district banks, and the National Neighborhood Indicators Partnership—will also continue to explore how to understand neighborhood change and advance equity in neighborhood development. We are interested in learning from others on the same journey and welcome information about other examples at NNIP@urban.org.

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NNIP is a collaboration between the Urban Institute and partner organizations in more than thirty American cities. NNIP partners democratize data: they make it accessible and easy to understand and then help local stakeholders apply it to solve problems in their communities.

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