

# Invest Atlanta Economic Mobility Plan

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*“Though Atlanta has one of the fastest growing economies of the nation’s large metro areas, it also leads the nation in income inequality.”*

The opening statement from an Invest Atlanta presentation on the *One Atlanta: Economic Mobility, Recovery & Resiliency Plan* (Mobility Plan) provides the rationale for a shift in how the organization conducts its economic development work on behalf of the city of Atlanta. In response, Invest Atlanta has stated it will “prioritize economic mobility and all the ways we can narrow the divide that so often falls along racial and geographic lines” (City of Atlanta 2020).

This case study explores how the city and Invest Atlanta engaged with the community to create the Mobility Plan and began adapting the Invest Atlanta toolkit to increase economic mobility among Atlanta residents and address inequities while continuing to pursue its mission to grow a strong economy, build vibrant communities and increase prosperity for all Atlantans.<sup>1</sup>

## “NOW WAS THE TIME”

Three catalysts prompted Invest Atlanta to consider how its work could be adapted to address income inequality and economic disparities that have long-existed in Atlanta. First, Mayor Keisha Lance Bottoms was elected in 2017 on a One Atlanta<sup>2</sup> platform focused on “an affordable, resilient and equitable Atlanta.” Goals included “thriving neighborhoods, communities and businesses” and “residents who are equipped for success.” Affordable housing, economic development and workforce development were three of eight critical areas in which city policies and practices were to be reviewed. The Mobility Plan refers to economic mobility as “an issue at the heart of” Mayor Bottoms’ One Atlanta initiative (City of Atlanta 2020).

Second, some city and community leaders had begun to question Invest Atlanta’s economic development incentive usage, wondering if certain projects needed incentives at all and skeptical that residents were benefiting from incentive spending (Williams 2018; Schenke 2019). According to interviewees, the incentive programs were designed to respond to past economic crises, especially the Great Recession, and economic development activities “were mostly focused on business competitiveness, but less on people and place.” At the same time, Mayor Bottoms began distinguishing her approach to government and economic development from that of the previous mayor, Kasim Reed (sometimes referred to as the real estate mayor) in favor of a focus on eliminating policies

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<sup>1</sup> <https://www.investatlanta.com/about-us/what-we-do>

<sup>2</sup> <https://weareoneatlanta.com>

that “keep the poor poor and Atlanta at or near the top of cities with the worst income inequality” (Fennessy 2017; Wheatley 2019).

Third, a series of widely-cited articles and reports prompted a response across the region, not just within the city, to address income inequality as a priority. Two national analyses dubbed Atlanta worst-in-the-nation by this measure. Such a designation “wakes you up,” said one interviewee. A 2018 Bloomberg analysis quoted in the Atlanta Journal Constitution named Atlanta “the most unequal large city in the United States” (Foster and Lu 2018; Pirani 2018). Bloomberg’s findings echoed those reported by Brookings in 2016, which found that, “Among big cities, Atlanta and Washington, D.C. exhibited the highest rates of income inequality” (Berube 2018). Within the city, groups had been “pressing this conversation for a long time,” according to one stakeholder. The national reports themselves reflected what many local analyses had also documented.<sup>3</sup> In 2019, for example, an Atlanta-specific report concluded that “pervasive inequities — the result of chronic disinvestment and long-standing racist policies — continue to prevent many African-American residents, who make up a majority of the city’s population, from accessing the opportunities necessary for them to fully contribute to, and benefit from, Atlanta’s growing economy” (Annie E. Casey Foundation 2019).

## Then COVID-19

Since the process began in 2019, the mobility strategy evolved to become the One Atlanta Economic Mobility, Recovery & Resiliency Plan to encompass Invest Atlanta and city plans to help businesses and communities recover from the COVID-19 crisis. This shift had a significant effect on the process and focus of the plan. Community and stakeholder engagement, including rollout of the strategy, were adapted and in some cases curtailed. The strategies and Invest Atlanta’s priority actions were adjusted to correspond to the city’s three-phase COVID recovery framework and to meet the emergency needs of residents and businesses most affected by the health crisis and economic downturn. The overall objective expanded beyond economic mobility to include economic recovery and resilience.

## INVEST ATLANTA

Invest Atlanta is the city of Atlanta’s economic development authority operating under a contract with the city. It was created in 1997 as the Atlanta Development Authority. It

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<sup>3</sup> Annie E. Casey Foundation Changing the Odds, Progress and Promise in Atlanta (2019); Partnership for Southern Equity, Atlanta Equity Atlas (2013); and Employment Equity: Putting Georgia on the Path to Inclusive Prosperity (2017).

includes the Urban Residential Finance Authority, the Downtown Development Authority, and the Atlanta Economic Renaissance Corporation. Invest Atlanta is governed by a nine-member board chaired by the Mayor of Atlanta. Its staff of 50 include ten in the Economic Development Department, eleven in the Community Development department, and five in Investment Services.

Invest Atlanta manages many financing and incentive tools designed for small and large businesses, developers, tax allocation districts (TADs), and individuals. Programs address affordable housing, neighborhood redevelopment, business attraction, and small business & entrepreneurship, with the following reported outputs for 2019 (Invest Atlanta 2019).

- **Affordable housing** — Invest Atlanta reported 735 affordable housing units created, \$1.4 million in down payment assistance, and investment of \$59.3 million that facilitated \$233 million toward affordable housing development. Invest Atlanta also helped fund 129 critical repairs through an owner-occupied housing rehab program for eligible residents.
- **Neighborhood redevelopment** — Invest Atlanta manages ten Tax Allocation Districts<sup>4</sup> (TADs) in the city. In 2019, 14 TAD projects with investments of \$14.1 million created 749 jobs. Invest Atlanta created a Community Development Entity called Atlanta Emerging Markets, Inc. to participate in New Markets Tax Credit projects. Invest Atlanta also promotes investments in the city's 26 Opportunity Zones (OZ) and was recognized for its efforts to use the OZ program to achieve equitable growth in underserved communities.
- **Business attraction** — Invest Atlanta worked on 19 projects generating over 2,500 new jobs and \$39 million in total investments in 2019, primarily in the fintech, healthcare, IT, film/television, biosciences, logistics and cybersecurity industries. Invest Atlanta also helped 15 businesses expand their Atlanta operations or remain in the city, supporting 2,260 jobs.
- **Small business & entrepreneurship** — Invest Atlanta issued \$1.3 million in small business loans. Invest Atlanta is also implementing several programs in the Southside neighborhoods, including Accelerate Southside to help minority-owned businesses grow and the Community Wealth Building Business Accelerator. Other initiatives provide resources and technical support to local businesses.

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<sup>4</sup> Tax allocation districts have specific financing tools (tax increment financing) to incentivize development. <https://www.investatlanta.com/developers/opportunities-incentives/tax-allocation-district-financing>.

Several interviewees expressed the opinion that Invest Atlanta has to do more to “tell the story” and let people know about the work the organization does. Despite its reputation, Invest Atlanta manages several programs designed for people and places as well as businesses. One interviewee explained, “If they see a problem nobody is addressing, they will take it on. This means staff and resources are stretched thinly.” Staff and leadership pointed to the set of neighborhood redevelopment, homeowner and small business programs that Invest Atlanta manages — in addition to the business attraction and incentives work. Some of this work is relatively new, like certain small business and entrepreneurship initiatives, but others focused on community development and housing are longstanding. These latter programs also have an established history of community and resident engagement. As one interviewee put it, they “are in the neighborhood and involved.” Invest Atlanta also has programs pre-dating the Mobility Plan that are focused on the west and south sides of the city. For example, Invest Atlanta oversees the Westside TAD<sup>5</sup> and is a partner with the Westside Future Fund.<sup>6</sup> Invest Atlanta initiated a Southside strategy in 2018 and has a dedicated staff member to lead the effort.

Nevertheless, there is a sense that Invest Atlanta’s work has existed “in a bubble,” according to one interviewee. Community leaders expressed frustration with the disconnect between the narrative that Atlanta is a great place for talent and business with the realities of inequality in the city and the lack of economic mobility for residents in the city’s south and west sides. Policies that directed incentives toward corporate projects that did not appear to do much for residents in the south and west side of the city became a specific point of contention. Many pointed out the symbolism of Invest Atlanta’s office in the downtown Georgia-Pacific Center — a facility and location designed to appeal to corporate executives. However, the building’s inconvenient location for many around the city, security measures simply to enter the office, and expensive parking made it off-putting to many residents and small business owners. Recognizing all these frustrations, the plan explicitly charges Invest Atlanta to lift up historically disinvested communities and “achieve better outcomes for black and brown communities located to the south and west of the city.” (City of Atlanta 2020)

## CREATING THE MOBILITY PLAN

Invest Atlanta began work in 2019 on an economic mobility strategy aligned with Mayor Bottoms’ One Atlanta initiative. The stated goal was to identify pathways and policy recommendations to improve economic mobility, with input from residents, businesses,

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<sup>5</sup> <https://www.investatlanta.com/developers/opportunities-incentives/tax-allocation-district-financing/westside>

<sup>6</sup> <https://www.westsidefuturefund.org/about/>

civic and not-for-profit leaders and other stakeholders, by enabling equitable access to opportunity and providing pathways to wealth creation across the city and reducing the gaps between the wealthier, majority white communities to the north of I-20 and poorer communities to the south and west where most residents are African-American.<sup>7</sup>

Concurrently, Invest Atlanta prepared an Equity Statement<sup>8</sup> in July 2019:

Economic prosperity and competitiveness in Atlanta start with equity—equitable access to opportunity and pathways to wealth creation. It is more than a goal, it is a guiding principle that drives us. We advance our work through this lens to ensure that all Atlantans are positioned to benefit from economic investments in our city, regardless of their zip code.

We are committed to responsibly utilizing the resources, economic incentives, programs and financial tools available to us to increase sustainable living-wage jobs and affordable housing, reduce income and wealth gaps across racial and social-economic lines, and help ensure all Atlanta neighborhoods and residents have the assets they need to thrive.

Invest Atlanta hired a consulting team led by Bloomberg Associates to prepare the economic mobility plan. A 23-member steering committee (Appendix B) was created to contribute to the process and help guide the plan's direction. The steering committee brought city and civic leaders focused on equity and disparity among people and places together with groups representing large and small business interests, as well as representatives of the north and east sides and from the south and west sides of the city.

Bloomberg Associates had been working with the city on related projects, including a Housing Affordability Action Plan, under the One Atlanta banner. After an initial RFP did not yield satisfactory responses, the steering committee helped rewrite the RFP and selected Bloomberg to manage the project and help with analysis, recommendations, and implementation strategies. Enterprise Community Partners was tapped to conduct the research, analysis, and community engagement tasks. Bloomberg and Enterprise are national organizations, but each had a designated local lead based in Atlanta. They in turn teamed with the Urban League of Atlanta and APD Urban Planning to work with local partners, provide guidance, and conduct the community engagement activities.<sup>9</sup>

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<sup>7</sup> <https://www.investatlanta.com/impact-insights/invest-atlanta-to-develop-citys-first-economic-mobility-strategy>

<sup>8</sup> <https://www.investatlanta.com/about-us/what-we-do>

<sup>9</sup> [https://www.investatlanta.com/assets/atl\\_em\\_strategy\\_faqs\\_LgN6jNb.pdf](https://www.investatlanta.com/assets/atl_em_strategy_faqs_LgN6jNb.pdf)

## Community engagement for the Mobility Plan

The Mobility Plan’s community engagement activities were built around sharing findings on economic conditions in the city and then soliciting input on a set of proposed pathways to improve economic mobility (Figure 1) (Enterprise Community Partners 2020). The pathways themselves were developed with stakeholder insight from Invest Atlanta staff, board members, city staff and councilmembers and steering committee members (Enterprise Community Partners 2019).

**Figure 1. Economic Mobility Pathways**

Figure 1: Key Economic Mobility Pathways Invest Atlanta Affects Directly (Highlighted in Orange). Pathways Likely to Need Partnerships with Invest Atlanta (Highlighted in Blue)



As an interviewee explained, the purpose of the community engagement “was about testing the pathways but still informing the process -- not just just responding to what was already decided.” Engagement took many forms, and the consultant team adapted to both conditions and criticisms as they went along. The pandemic led to some canceled sessions, which limited direct participation, but even before then, several stakeholders and participants indicated that insufficient time and resources had been allocated for engagement work.

The steering committee continued to play an important role as a group and via one-on-one conversations, though the level of active participation varied among members. Committee members reacted to the research findings, helped establish the

vision and articulate priorities, and provided feedback for both the pathways and objectives that were developed in the Mobility Plan itself.

The consultant team held three focus groups with residents, small businesses, and community organizations and conducted over 25 additional one-on-one calls or meetings with city government and civic leaders. Atlanta-based team members led the focus groups. These sessions were held at the Invest Atlanta office and were the source of several of the comments about the negative perceptions associated with the space. The focus groups convened in the middle of the day, which was inconvenient for working individuals. One interviewee noted that while they “touched a lot of people, others were left out.”

Invest Atlanta provided updates to the city council via the Community Development/Human Resources Committee throughout the process. Both stakeholders and city council members encouraged the consultant team to do more direct engagement with residents. In response, four town hall meetings were scheduled along with a social media outreach effort, email and e-newsletters, two online surveys, and a survey/comment box on the Invest Atlanta website to solicit public comment. The town hall meetings were held in different locations around the city and at various times to encourage participation. Approximately 120 residents participated.

The team estimated that about 20,000 people were invited to participate at one time or another throughout the process, and that the outreach generated 200 “touches” or participation in events. Interviewees largely agreed that with more time and resources, they could have done better to hear more voices, including more meetings on the south and west sides. Nevertheless, the focus groups, voting mechanisms used during the town halls, and inputs through other media were thought to have generated valuable input on priorities. These inputs helped shape the Mobility Plan objectives based on the four economic mobility pathways.

The consultant team then distilled the findings from the research, stakeholder and steering committee feedback, and community engagement responses into five objectives that are the heart of the Mobility Plan. Members of the steering committee and staff provided feedback, and the objectives were further refined with inputs from city staff and Council. Options were assessed against budget and staff constraints, considering “the art of the possible” as one interviewee put it. The completed Economic Mobility, Recovery and Resiliency Plan for 2020-2023 was released in July 2020.

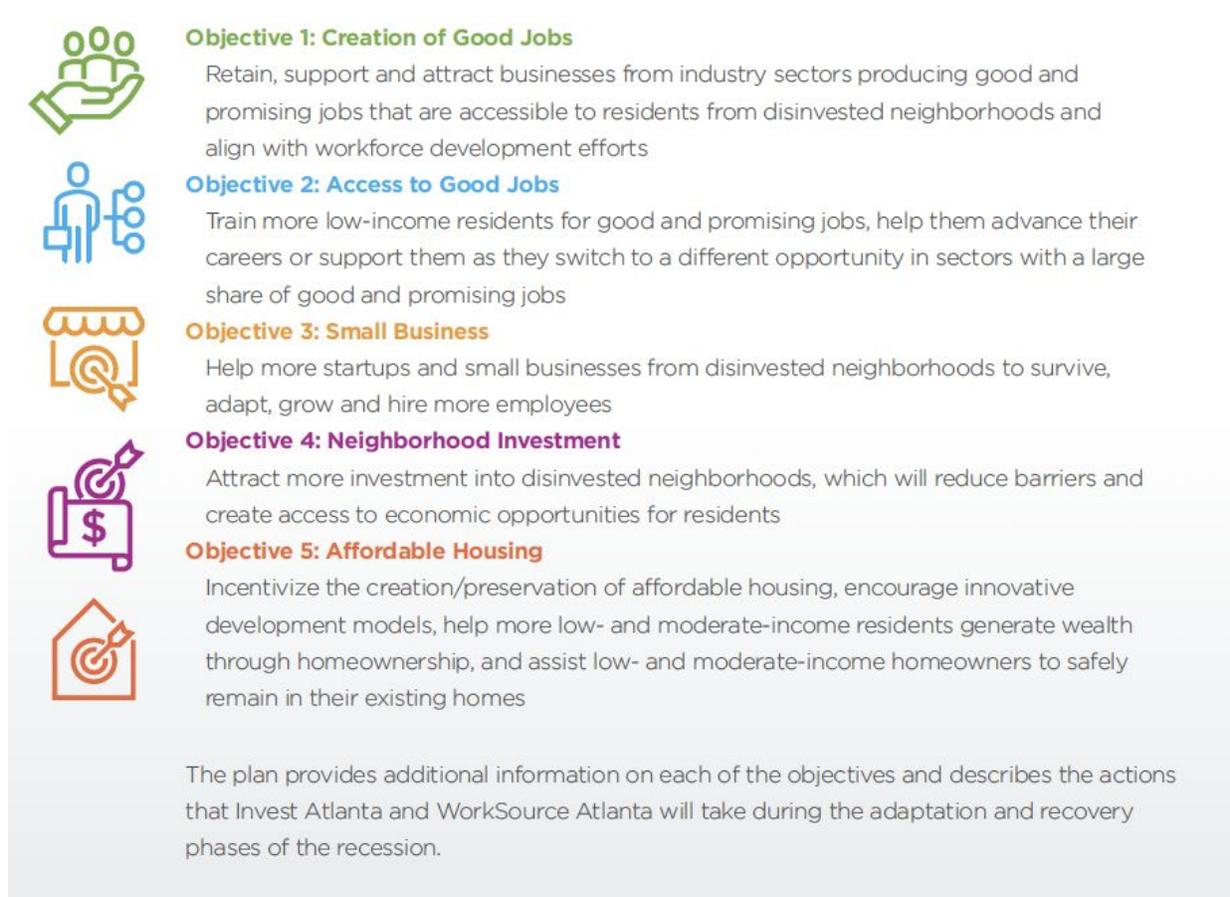
The Mobility Plan has been completed and released, but the work is just beginning. The city and Invest Atlanta recognize the tenuous nature of the strategy, noting in the Plan itself:

A complete understanding of the pandemic’s impact in terms of bankruptcies, job losses and wealth destruction is not yet known, but as new information emerges, some of the plan’s proposals and strategies may need to be reprioritized, accelerated and/or scaled. Additional strategies may be necessary. In the meantime, it will be important for Invest Atlanta and WorkSource Atlanta to remain agile (City of Atlanta 2020).

### Five objectives, multiple partners

The Mobility Plan is organized around five objectives (Figure 2).

**Figure 2. Strategic Objectives**



Source: ONE ATL Economic Mobility, Recovery & Resiliency Plan 2020

Each objective is aligned with a pathway and has an associated set of priority actions for which target workers and businesses, partners, and Invest Atlanta tools are listed. All together there are 41 priority actions to be implemented over the three year plan timeline.

To provide one example, Objective 1: Creation of Good Jobs is aligned with the Economic Systems Pathway. For this pathway, the Enterprise analysis suggests that Invest Atlanta support industries and businesses that produce good and promising jobs, are accessible to residents from priority neighborhoods, and are aligned with workforce development efforts. The Mobility Plan describes Invest Atlanta’s tools for these objectives as the business retention, expansion and attraction program and the financial levers/incentives used to attract and retain businesses. Specific actions, target workers and businesses, partners and timing are summarized in Figure 3.

**Figure 3.**

Invest Atlanta's Tools	Priority Actions	Target Workers and Businesses	Partners	Timing
<b>Expand business retention, expansion and attraction program</b>	Expand business retention and expansion services to support businesses in industries that can be sustained during the downturn and create large numbers of accessible, good jobs in sectors where Atlanta has a competitive advantage	Prioritize healthcare, transportation, construction, advertising, insurance, information, wholesale, professional services, education	Metro Atlanta Chamber, Georgia Department of Economic Development, Georgia Power	Year 1
	Business attraction efforts should focus on projects that bring good and promising jobs	As above, and opportunistic	Metro Atlanta Chamber, Georgia Department of Economic Development, Georgia Power	Ongoing
<b>Create/modify/use financial levers/incentives to attract and retain businesses</b>	Modify and create new financial incentives with a new scoring matrix to support good jobs that may not require a college degree, encourage proximity to local transit, encourage hiring of residents from disinvested communities and WorkSource Atlanta, offer additional incentives for projects in the Southside and Westside areas of town, encourage investments in career advancement training and/or company-supported childcare	Businesses offering large number of good and promising jobs	Mayor's Office, City Council, Invest Atlanta Board	Year 1
	Launch Equitable Growth Grant program focused on the creation and attraction of high-quality, middle-wage jobs	Businesses offering large number of good and promising jobs	Mayor's Office, City Council	Year 1

Source: ONE ATL Economic Mobility, Recovery & Resiliency Plan 2020

Key performance indicators (KPIs) accompany each objective. As one stakeholder explained, the KPIs focus on metrics to monitor the operations of Invest Atlanta and WorkSource Atlanta “to incentivize staff and enable stakeholders and hold them accountable for their impact.” Accordingly, the KPIs primarily emphasize program outputs, such as number of businesses assisted or residents served, and program outcomes, such as jobs meeting certain wage, benefit, and career pathway criteria (Figure 4).

**Figure 4. Key Performance Indicators**

Objective	Key Performance Indicators (3-Year Totals)
<b>Creation of Good Jobs</b>	1. Attract/support businesses that create/retain 6,000 direct, good (\$40k-\$80k + employer-sponsored health insurance) or promising jobs (entry-level jobs from which most workers can reach a good job within 10 years)
<b>Access to Good Jobs</b>	1. Provide services to 700 through the one-stop resource center exclusive of WIOA eligibility 2. Train 450 unemployed residents with skills/credentials needed for good/promising jobs in high-demand industries 3. Place 150 unemployed/recently displaced workers into paid work experiences and/or employment and training opportunities 4. Support in-school and out-of-school youth through paid summer work experience and training in high-demand career fields - 75% of the youth are from disinvested neighborhoods
<b>Small Businesses</b>	1. Support 900 SMBs to increase employment - 50% are businesses with 1-9 employees - 70% are minority- or women-owned businesses 2. Support 225 SMBs to become financially stable* 3. Create a fashion and art district in Southside to support 50 good/promising jobs  * Defined as showing signs of financial health (revenue is growing, profit margins are growing, expenses are staying flat, business has enough cash in the bank to meet an unexpected expense, business has both new and repeat customers)
<b>Neighborhood Investment</b>	1. Attract/enable the creation of at least one national CDFI investment and 15 healthy food options to/in disinvested neighborhoods
<b>Affordable Housing</b>	1. Help 450 low-income households purchase homes 2. Incentivize 1,250 affordable residential units to be built near transit 3. Activate blighted, vacant and underutilized properties and rehabilitate commercial corridors (through private investment) 4. Support 2,475 households so they are no longer cost-burdened**  ** Defined as paying more than 30% of income for housing (or rent)

Source: ONE ATL Economic Mobility, Recovery & Resiliency Plan 2020

The KPIs will help assess the work of Invest Atlanta and WorkSource Atlanta, but they will not reflect the broader vision and priorities associated with improving economic mobility in the city. For that purpose, the Plan refers to a neighborhood map<sup>10</sup> that “visualizes whether economic mobility pathways are operating effectively in different parts of the city and enabling residents to attain better economic and social outcomes,”

<sup>10</sup> <https://neighborhoodnexus.org/atl-econ-mobility/>

acknowledging that Invest Atlanta and WorkSource Atlanta are not “solely responsible” for progress on neighborhood indicators. Progress will depend on partnerships with city agencies, nonprofits, and other private or community based organizations (City of Atlanta 2020).

## WorkSource Atlanta

WorkSource Atlanta is the city’s lead workforce development organization and is responsible for city programs funded under the Workforce Innovation and Opportunity Act (WIOA). WorkSource Atlanta offers career, education, and training services that help city residents prepare for and obtain work. The organization has had a troubled history.<sup>11</sup> The current executive director, appointed in October 2019, is the sixth person to hold that position in six years. Missed deadlines, improper payments, and poor performance have led to loss of funds. Audits dating back to 2013 have criticized the organization’s program management and weak leadership (Quinn 2019).

In June 2019, the Mayor announced that WorkSource Atlanta would be integrated into Invest Atlanta with the idea that the combined services would prove more efficient for businesses seeking workers as well as individuals seeking jobs. The Invest Atlanta Board formally approved the integration in November 2020.<sup>12</sup> The combination is considered critical to the successful implementation of the Mobility Plan, specifically to “coordinate business and workforce development programming, focus more on people and place rather than just business, (and) prioritize systems and partnerships” (City of Atlanta 2020). The People-based pathway includes workforce capacity and the ability of residents to qualify for, secure and maintain good jobs. The objective for access to good jobs will require WorkSource to help prepare more residents for in-demand jobs, align training and education programs with employer needs, promote career advance opportunities, and work with opportunity youth. WorkSource Atlanta will be preparing a FY2021 delivery plan to support Mobility Plan implementation. Some interviewees considered the integration of Invest Atlanta and WorkSource Atlanta to be the planning effort’s most important accomplishment.

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<sup>11</sup> “Accusations that Work-Source has served as a prop for fraud and abuse of government funds have beleaguered the city agency for more than a decade.” (Deere 2020)

<sup>12</sup>

<https://www.investatlanta.com/impact-insights/board-greenlights-invest-atlanta-worksource-atlanta-integration>

## INSIGHTS AND LESSONS LEARNED

The following considers lessons learned within the research framework laid out in the report, *Reflecting Community Priorities in Economic Development Practices* (Hackler and Harpel 2020).

### Determine community priorities with equitable community engagement

#### Elected leaders are central to articulating and establishing community priorities for economic development

The notion that elected officials represent residents in setting the direction for government-supported activities like economic development almost seems too obvious to merit mention. However, this case study highlights how different mayors elected on different economic development platforms set the agenda for organizations like Invest Atlanta. In this case, the mayor's One Atlanta initiative and emphasis on addressing inequalities in city government translated into a new focus for Invest Atlanta. City Council members also play an ongoing role in articulating community priorities to Invest Atlanta through the Community Development/Human Resources Committee and Council representation on the Invest Atlanta Board.

Regarding the Mobility Plan, representatives of the Mayor's Office and a member of City Council served on the Steering Committee. Council members were briefed during the Plan's development, at which time they pressed the consulting team to conduct more resident engagement, leading to the decision to hold town hall meetings in different locations in the city. Elected leaders, especially Council members representing the south and west sides of the city, will be key players in helping Invest Atlanta improve and sustain its community engagement work by helping the organization "plug in and navigate" the multiple neighborhoods comprising these two areas of the city.

#### Listening takes practice. Aim for and accept steady improvement in community engagement work.

The community engagement process for the Mobility Plan was not perfect. Invest Atlanta learned hard lessons and made adjustments along the way in response to stakeholder and participant feedback. More than one interviewee acknowledged that listening to community needs and holding an open dialogue represents a big shift for the organization and commended the effort, suggesting that some grace will be afforded Invest Atlanta's initiatives as long as they are made in good faith and backed with

organizational commitment. As Invest Atlanta builds its community engagement capacity, multiple interviewees also suggested Invest Atlanta should continue to partner with organizations that have the necessary community experience to sustain engagement during program design and implementation.

The Mobility Plan process also revealed the gains that can be achieved by expanding the circle of who is considered an economic development stakeholder. The Steering Committee included city, business, and workforce organizations that are the typical economic development stakeholder groups. It also included entities that deliver direct services to residents, foundations, and not-for-profit community organizations that had been leading the charge on issues of economic mobility and disparity in the city and at the neighborhood level. This approach enabled Invest Atlanta to actively listen to new voices and start to establish sustainable working relationships. This type of steady evolution in engagement that ultimately leads to deeper engagement with residents may be a more realistic option for many economic development groups rather than attempting a complete restructuring of community engagement practices.

**Economic development organizations can use their strengths as a connector/convener to bring multiple voices to the table**

Recognizing multiple voices in the community is an essential aspect of inclusive economic development. When asked whether or how the Mobility Plan's engagement process did so, two surprising responses emerged.

First, multiple interviewees praised the process for bringing representatives from business and community-based organizations together to talk about ways to improve economic mobility. Similarly, the process brought together individuals from the north and east sides of the city with individuals from the south and west sides. Having the opportunity to speak directly to each other around a common theme helped show the linkages among the communities, not just the divisions. It provided a chance to "demonstrate to all sides that we need each other to achieve what we all want."

Second, more needs to be done to engage the residents whom the Mobility Plan intends to help. Interviewees acknowledged this is almost always a gap, with philanthropies and organizations that provide direct services to residents standing in to represent the community point of view. Working-age residents and parents were a particular challenge to engage even though the jobs, business and workforce strategies would be designed for them. The community participation was reported to be more heavily weighted toward senior citizens. Guidelines on equitable community engagement show that stipends or

other means of compensating working adults for their time, scheduling meetings or using other engagement techniques to accommodate various working schedules, holding meetings in convenient and accessible locations, and providing food and childcare are common methods cities use to increase resident participation that Invest Atlanta may consider going forward.

Many economic development organizations play an important role as connectors and conveners in their communities. They have limited resources on their own, but they regularly engage with other government agencies around housing, transportation and planning needs; school systems, colleges, and workforce development service providers around talent and jobs needs; and entrepreneur support organizations around resources and technical support for small businesses. Economic development groups like Invest Atlanta can leverage this skillset not only to expand the circles in which they engage, but to help those circles intersect to build trust and establish partnerships that will enable them to work together to address community priorities.

### Put the community at the center of engagement activities

So far this case study has put Invest Atlanta's strategic planning effort at the center of the engagement activities. This may be appropriate since the Mobility Plan is intended to refocus Invest Atlanta's work. It may also be useful to reverse the thinking. Instead of centering Invest Atlanta in the conversation, centering Atlanta's residents and neighborhoods would allow for broader thinking about the range of tools and resources available to address the documented disparities. By committing to joining conversations that are already happening and moving away from Invest Atlanta-led engagement, Invest Atlanta can become a trusted partner in devising appropriate program and policy responses to community priorities. There are several indications that Invest Atlanta will move in this direction and "meet residents, constituents where they are" (City of Atlanta 2020).

Supporting neighborhood specific organizations located in the community to inform and deliver programming is one way to center community in the engagement process. Invest Atlanta intends to open satellite offices in additional parts of the city. For example, the Opportunity Zones & Special Initiatives Manager will be located in the Russell Center for Innovation & Entrepreneurship in Atlanta's Southside. The organization has also considered using shared office spaces (such as WeWork) to encourage staff to work in neighborhoods beyond downtown. Of course, all staff are currently working remotely due to COVID-19.

Beyond being physically present in Southside, the Invest Atlanta manager has emphasized attending and participating in meetings hosted by other community organizations. This approach is consistent with an interviewee's observation that Invest Atlanta should be "going where the community is and asking them what they want instead of telling them what Invest Atlanta is doing and getting feedback." The idea is to find the conversations that are already happening and figuring out how Invest Atlanta can participate. To make the most of these interactions, another interviewee pointed out that it is up to Invest Atlanta "to create substantive, meaningful engagement opportunities." Further, "some leadership or capacity building is essential to increase the capacity of the people called on to help."

Consistent with this approach, Invest Atlanta may also host activities in its own neighborhood space, when it is available, opening it to community groups as well as holding Invest Atlanta events. Several interviewees also recommended using the established Neighborhood Planning Units (NPU) throughout the city to "take the economic mobility strategy to the people to make sure that what the city is planning to do is actually what residents want." At the same time, most of the same interviewees stated that the NPUs should not be the only means for communicating with residents because their capacity and activities are "not equal across the city" and they are "not always representative."

### Value the work of engagement

Community engagement is too often an afterthought for many economic development organizations, a task that needs to be checked off the list once it has been decided to pursue a project or initiative. Similarly, it can take on a pro forma feel during planning processes.

Several interviewees acknowledged that engagement could have been built into the Mobility Plan timeline in a better way. Engagement should have been "more intentional and well-resourced." These are important takeaways for the Mobility Plan's implementation, which will require sustained engagement to succeed.

Organizations need to commit time and resources to sustain engagement. Invest Atlanta has already expanded the duties of the Opportunity Zones & Special Initiatives Manager to focus on southside priorities. The organization has also hired a chief equity officer to ensure all Invest Atlanta programs are consistent with One Atlanta priorities and the Mobility Plan's objectives. Another new hire will be dedicated to community engagement

and will manage the interface between stakeholders and residents and Invest Atlanta programs.

Organizations also need to value and support the people who do the engagement work. This includes staff as well as external partners. The engagement staff should not be siloed away from senior leadership and program managers. Other Invest Atlanta team members should regularly be involved with engagement activities if they are to accomplish their purpose. They should be integral to the teams charged with implementing tasks, such as business attraction and workforce training, since they will bring insights from the community that should be incorporated into program design and will in turn share program information back with the community that is intended to benefit from the efforts.

**Design holistic solutions with equitable community engagement for equitable economic development investments in people, business, place, and governance**

**Sustain engagement during program design and implementation**

The community engagement process to create the Mobility Plan is just the beginning of the engagement work. Interviewees suggested that Invest Atlanta is likely to be responsive to feedback that they receive on programs and changes to their toolkit. However, others questioned how informed and engaged community stakeholders would be on policy changes and programmatic efforts.

Invest Atlanta has proposed a plan to sustain engagement and seek community feedback proactively as initiatives are implemented. The organization has planned several activities to keep the conversations going, including homebuyer education events, small business seminars, community Q&As, community fairs, business retention and expansion meetings, NPU meetings and Invest Atlanta 101 events, and other educational events in addition to sustaining communication through social media, email and newsletters, advertising campaigns, and text notices. Invest Atlanta will track several metrics on engagement, such as total events held/attended, total and diversity of event attendees, contact information collected, partners engaged, locations of events, social media metrics, and survey results on customer satisfaction (Invest Atlanta 2020). It is not yet clear if any programs will be co-designed in cooperation with community groups.

### Commit to adapting programs to the priorities

Invest Atlanta has already begun adapting its programs to be more responsive to community needs. A senior executive explained that “Economic mobility is now the lens for everything that we do” and that they will “evaluate all their programs to figure out how each one deals with income inequality and to make sure every program is tied to one of the strategy’s priority areas.”

For its business-oriented pathways, Invest Atlanta has been developing a revised scorecard for incentive proposals that includes people-focused criteria to indicate not just whether there will be new jobs, but to provide more insight on who gets that job in order to determine how well the project will meet the needs of city residents. A small business support program was reworked so that the eligibility rules, disbursement procedures, and application requirements did not exclude the smallest businesses it was intended to help. For the people pathway, WorkSource Atlanta will emphasize training, hiring and career progression and creating better linkages with employers and available jobs for low-income residents and those in the south and west side of the city. The place or neighborhood pathway will emphasize attracting more investment into disinvested neighborhoods and supporting affordable housing.

### Recognize one agency can’t go it alone

Partners are a key part of program design and implementation. They have been integral to the process from the beginning and are critical to implementation. Mobility Plan documents recognize the role partners will play. For example, the Enterprise reports referenced previously color coded the elements of each of the four pathways to distinguish what Invest Atlanta could influence from what it could not. The Mobility Plan itself also highlights the important role supporting partners play in affecting the pathways and lists partners associated with city government as well as public-private partnerships and private sector, philanthropic, community and faith-based organizations. Partner organizations are embedded in every priority action within the Mobility Plan. Interviewees stressed the need for Invest Atlanta to cultivate partnerships and convene the partner organizations to coordinate programs and initiatives so each group is not “doing its own thing.”

### Concern that the plan’s actions and KPIs are missing the big picture

Some interviewees expressed the position that more work needs to be done to move from plans to policy that “would really shrink the racial wealth gap and create the change

we need.” Some considered the proposed action items to be too narrowly focused and lacking the power and range to generate the desired impact on the community. For example, will changes to the incentive scorecard fundamentally change the types of jobs that are brought to Atlanta? Will changes to the workforce development system actually connect residents to good jobs? How will the neighborhoods’ expressed needs regarding health, safety, and social capital be met by the strategy? Where are the strategies to address community wealth building? It is not clear how the city or Invest Atlanta will respond to this concern.

### Concern with the lack of resources available to implement the Mobility Plan

A related source of concern is the lack of resources available for the Mobility Plan’s implementation. A budget estimate was not part of the plan’s release. The city has not provided any additional funding for the Mobility Plan, and Invest Atlanta itself does not have new funding for its revised and expanded activities. Some of the staff positions associated with the Mobility Plan were restructured internally or responsibilities were added to existing staff workloads. So far, activities have been funded from the existing budget, including savings from activities that were curtailed by COVID, CARES Act funding, and some of their own financing tools that generate revenue.

The expectation is that partners will contribute resources for implementation, often on an in-kind basis and, as Invest Atlanta has done, by restructuring existing efforts. However, there was widespread agreement among interviewees that the model is not sustainable without funding. Without a funding commitment or a plan that extends beyond three years, it will likely be difficult to convince partners to devote their own resources to implement the Mobility Plan. Without the partners, the broader objectives of the Plan are not achievable.

### Evaluate with priorities from equitable community engagement in mind

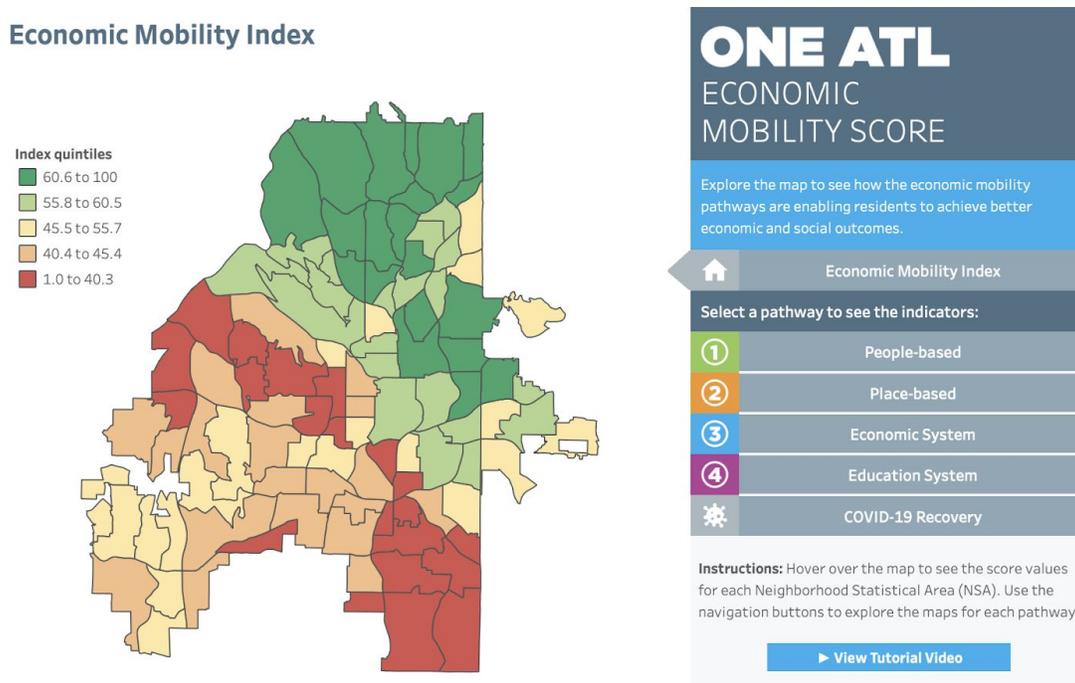
#### Create an evaluation process from the start

The Mobility Plan includes two methods of assessing progress toward meeting community expectations and implementing programs in response to the priorities in the Mobility Plan. The first is a set of key performance indicators (KPIs) organized by plan objective. The KPIs were developed by the consultant team following Kellogg Foundation logic model guidance (W.K. Kellogg Foundation 2004) to examine outputs and activities connected to the desired impact, rather than emphasizing activity metrics as the primary measures of performance. Invest Atlanta has committed to using the KPIs for staff and

program evaluations and agency reporting. The KPIs focus on agency operations and represent program outcomes.

The second method is a map of economic mobility metrics by neighborhood representing economic outcomes across the city (Figure 5).<sup>13</sup>

**Figure 5. Economic Mobility by Neighborhood**



Source: Neighborhood Nexus, One Atlanta Economic Mobility, Recovery & Resiliency Plan

The map is intended to be a guide for partners (inside and outside the city) to understand where they should target their policies, resources, and programming (City of Atlanta 2020). The map focuses attention on indicators of economic mobility beyond those that Invest Atlanta can directly affect but are closely aligned with community priorities and the people, place, education, and economic pathways. It is not clear if community or neighborhood organizations can add their data to the map, but this could represent one option to expand the range of indicators available to track changes in the city.

It appears that Invest Atlanta will be responsible for collecting data on its program performance to support reporting on the KPIs, though this has not been specified. The KPIs will require data on job quality characteristics (wages, benefits, career potential,

<sup>13</sup> [www.neighborhoodnexus.org/atl-econ-mobility](http://www.neighborhoodnexus.org/atl-econ-mobility)

etc.), residents completing workforce training and placed in work experiences, characteristics of small businesses assisted (owner demographics, employment, financial stability, job creation, etc.), healthy food options in neighborhoods, household supports regarding housing, and new affordable housing units by location.

On the one hand, the KPIs will help Invest Atlanta staff determine how to execute programs so that they are aligned with Mobility Plan objectives. This will then allow the agency to report on specific ways that its work has supported the community priorities in the Mobility Plan. On the other hand, the indicators are fairly narrow and don't appear to capture the type of change many residents and stakeholders who contributed to the Mobility Plan might expect. Some interviewees suggested that it is not clear that the "KPIs get at what is important to people" and that they are "short-term indicators of progress" when they are really striving to address long-term resident needs.

### Specify how information will be shared with the public

Information will be shared with stakeholders and residents in several different ways. Invest Atlanta has committed to publishing progress reports on the KPIs "regularly." The organization's new chief equity officer will report progress against the KPIs to the Invest Atlanta Board, and Invest Atlanta executives present to the City Council two to three times per year in public meetings. The online neighborhood map is "dynamic and searchable and will be updated regularly" (City of Atlanta 2020).

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## APPENDIX A: INTERVIEWS

- Dawn Arnold, Executive Vice President & Chief Operating Officer, Invest Atlanta (oversees the Community Development, Finance, Information Technology, Human Resources and Investment Services departments)
- Tom Cunningham, Senior Vice President and Chief Economist, Metro Atlanta Chamber
- Gordon Innes and Clara Raugei, Bloomberg Associates
- Nancy Johnson, President/CEO, Urban League of Greater Atlanta
- Dr. Eloisa Klementich, President & CEO, Invest Atlanta
- Nathan Regan, Senior Vice President of Economic Development, Invest Atlanta

- Meaghan Shannon-Vlkovic, Vice President and Southeast Market Leader, Enterprise Community Partners
- Ed Smith, Opportunity Zones & South Side Manager, Invest Atlanta
- Nathaniel Smith, Founder and Chief Equity Officer, Partnership for Southern Equity

## APPENDIX B: STEERING COMMITTEE

The steering committee for the One Atlanta: Economic Mobility, Recovery & Resiliency Plan comprised:

- Alicia Philipp, Community Foundation for Greater Atlanta
- A.J. Robinson, Central Atlanta Progress
- Doug Hooker, Atlanta Regional Commission
- Egbert Perry, Integral Group
- Grace Peart, Community of Destiny
- Jacob Vallo, MARTA
- Jay Bailey, Russell Center for Innovation and Entrepreneurship
- Jim Durrett, Buckhead CID
- John Helton, CareerRise
- Jon Keen, Mayor's Office
- Karl Barnes, Community Representative
- Katerina Taylor, WorkSource Atlanta
- Kevin Green, Midtown Alliance
- Kristy Rachal, Georgia Power
- Kwaku Forstall, Annie E Casey Foundation
- Luisa Cardona, Mayor's Office of International Trade

- Mariangela Corales, Goodwill of Georgia
- Matt Westmoreland, Atlanta City Council
- Nathaniel Smith, Partnership for Southern Equity
- Nicole Hall, West End CID
- Scott Shelar, CEFGA
- Tom Cunningham, Ph.D., Metro Atlanta Chamber
- Victoria Seals, Ph.D., Atlanta Technical College

## CASE STUDY BACKGROUND

This case study was prepared as part of the Smart Incentives project, *Reflecting Community Priorities in Economic Development Practice*. The interviews for this case study were conducted between August and October 2020.

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