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# REFLECTING COMMUNITY PRIORITIES IN ECONOMIC DEVELOPMENT PRACTICES

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# EXECUTIVE SUMMARY

This white paper addresses ways governments and communities can work together effectively to ensure that community goals and priorities are reflected in economic development practices. This topic is timely as community groups, businesses, philanthropies, economic developers and governments grapple with economic conditions that have left many residents struggling. This paper helps leaders determine how to adapt their economic development efforts so that more residents prosper.

## FRAMEWORK

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*Economic development that is equitable, inclusive, and outcome-driven for residents begins by prioritizing community engagement and clearly linking that engagement to actionable initiatives with measurable results.*

**EQUITABLE,  
INCLUSIVE,  
OUTCOME-  
DRIVEN**

1

### **DETERMINE**

The first step in connecting economic development practices to community goals is to determine what residents' priorities are. Economic development and community-based organizations have been expanding their engagement and outreach efforts to include more voices and give them more agency in the conversation. Equitable engagement recognizes and actively seeks new voices, sustains a commitment to the community, and is willing to think broadly to address multifaceted community concerns.

2

### **DESIGN**

The second step is to design programs that are responsive to the community's articulated goals and priorities. This step often requires partnership with local government entities, the business sector, community-based organizations, faith-based institutions, educational entities, the philanthropic community, and others to take on cross-cutting initiatives that address community-identified priorities. Sustaining engagement during the design phase enables partners to co-create programs that incorporate people, place, business, and governance capacities and yield holistic, responsive solutions that transcend individual organizations and disciplines.

3

### **EVALUATE**

The third step is to evaluate and report on progress toward priorities. This step involves putting processes in place to collect data on activities and outcomes to assess whether the initiatives that were designed to respond to community needs have been effective. Evaluation and reporting are necessary for transparency and accountability. Formal reporting back to the community helps ensure that priorities continue to be reflected in economic development practices and indicates when course corrections are needed.

On the surface, these steps sound similar to those of skillful economic development strategic planning and implementation processes. The primary contrast here emphasizes how the community is engaged in defining, implementing, and assessing priorities.



## INSIGHTS

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*Findings from four in-depth case studies and review of community engagement processes for equitable and inclusive economic development in over a dozen communities yielded several insights around the determine-design-evaluate framework.*

The cases illustrate hard lessons learned about the importance of mutual trust and respect when asking community organizations and residents to contribute their valuable time and experiences to the process of economic development. They also illuminate the need for economic development organizations (EDOs) and their partners to honor their commitments to the community by being responsive in programs and practices, providing transparency and accountability, and sustaining engagement over time as operational principles.

### **ACKNOWLEDGE A SHARED HISTORY AND COME TOGETHER AROUND DATA-DRIVEN FINDINGS**

Initiatives that strive to expand community engagement in order to determine residents' priorities for economic development typically have a narrative with a starting point, often involving new data or the release of a new report. However, that starting point is almost always in the middle of an ongoing story and is embedded in the community's history of economic development. Acknowledging the history is just as important as creating a common understanding around current economic development challenges when striving to establish trust and determine priorities.

### **EVOLVE ENGAGEMENT PRACTICES FROM INFORMING TO LISTENING, LEARNING, AND PARTNERING**

Economic development organizations often have experience with informing or consulting residents on projects or initiatives, but case studies and review of EDO practices show that they are at the early stages of integrating into their work higher level engagement processes in which residents affect, recommend, and/or are responsible for decisions. The EDOs involving residents at a higher level give the community a voice that allows for the setting of community goals and priorities. The EDOs that evolved even further collaborate with and empower the community on program design, implementation, and evaluation.

### **GROW THE CIRCLE BY BUILDING TRUST AND RESPECT**

Convening and connecting multiple perspectives to enable cross-sector collaborative partnerships to take on community-wide challenges can be economic development's superpower. Nevertheless, many traditional economic development strategies do not involve a diverse array of community stakeholders beyond business, government and workforce partners. Nor do they prioritize community engagement and collaboration with residents and smaller businesses in the areas most in need of economic development opportunities. These conventional practices may result in those left out of the planning process feeling discounted and skeptical of the resulting policies, which are often purported to be for their benefit. Equitable economic development and community engagement



efforts are intentional about including multiple voices and building trust and respect for all participants' expertise and knowledge so that all feel valued for their roles. A process of open dialogue can work to integrate business voices with community voices. The challenge is that this work is time consuming and requires deep community connections that some economic development organizations lack. The experiences of the case study communities suggest that a slow and steady effort to expand the circle of stakeholders to include new voices is a more realistic scenario than leaping immediately to a completely inclusive engagement process. Others have made progress by creating a network of networks in which existing economic development networks collaborate with established community networks to determine priorities and design responsive programs.

**PROVIDE CLARITY  
ON ROLES,  
RESPONSIBILITIES,  
AND AUTHORITY**

The process of community engagement also needs to be carefully managed, with clear expectations set on how the process works and well-defined roles and responsibilities so that engagement is respectful of people's time and contributions.

**COMMIT TIME  
AND RESOURCES  
FOR RESPONSIVE  
PROGRAM DESIGN  
AND IMPLEMENTATION**

Follow-through to community engagement is, of course, critical. Funding and resources are vital to transitioning visions and plans to viable projects. Moving from strategy to action requires organizations to plan for costs associated with coordination among stakeholders, support for the planning process and working groups, securitization of funding to advance and continue implementation, and essential staff and overhead costs for the organizations that will be accountable for the work.

EDOs are not typically able to deliver on all identified community priorities on their own. They must partner with a variety of organizations and can often help by offering operational support (staff, space, technical assistance) or building capacity among direct service providers.

**PLAN FOR SOLUTIONS  
THAT TRANSCEND  
PROGRAM OR  
AGENCY BOUNDARIES**

Many of the economic development strategies identified through inclusive and equitable engagement processes have multiple levels. They may target neighborhoods or places in need of economic development but they may also incorporate city- or region-wide initiatives. A place conscious approach to economic development also often necessitates modifications of existing city and regional strategies to recognize the linkages among people and place, especially regarding job opportunities and delivery of government services and programs. Reflecting community priorities in economic development practices requires understanding the interactions among people, place, business, policy, and governance capacities and developing holistic, collaborative responses.

**DEVISE “JUST RIGHT”  
METRICS THAT  
PROVIDE ACTIONABLE  
INSIGHTS**

Metrics and public reporting are necessary for transparency and accountability to the community. However, selecting the right set of indicators that capture the long-term and multi-faceted outcomes that make a difference to people, business and place is a challenge, as is ensuring that there is a tenable connection between the action and the outcome. Resources are rarely made available to support the hard work of identifying or developing valid data sources, collecting and analyzing the information, and presenting data in a reporting format that is both informative and interesting.

Data has the potential to be the weak link in the effort to connect economic development practices to community priorities. Data definition, collection, and management protocols appear to be poorly specified for many proposed people-, place- and business-based program metrics examined in our research. Without quality data that can be readily obtained and validated, reporting will fall short of expectations and hinder accountability efforts.

## **CONCLUSION**

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The work to reflect community priorities in economic development practices is long-term in nature. The case studies and research showed that the determine-design-evaluate framework is about much more than completing a short-term checklist of activities. The insights presented emphasize trust, respect, commitment, accountability, and partnership when engaging with the community to achieve more equitable and inclusive people-, business- and place-based outcomes. The essential takeaway from this white paper is that hard work must be put in and sustained over time to establish relationships built on trust and mutual respect in order to make progress on the issues that most concern residents.







# INTRODUCTION

Across the nation, policy makers and economic developers are grappling with profound economic disruptions and the growing understanding that pathways to opportunity and prosperity are not accessible to the full range of community members. The COVID-19 pandemic has created short-term shocks and amplified long-term trends in globalization, technological change, and income inequality that were already shaking the economic foundation in many communities. Some places have benefited from these forces, but many fear they are falling behind while some never recovered losses suffered during the Great Recession. Even the places that are considered economically successful are struggling to address growing income disparities and unequal opportunities.

As attention to these gaps and contradictions grows, policy makers, economic developers, and community leaders recognize the need for state and local economic development efforts that address these growing disparities and contribute to policy changes that create pathways to prosperity. A number of initiatives (see Appendix A) have emerged that aim to foster equitable and inclusive economic development even though these approaches are relatively new to many industry professionals.<sup>1</sup> In doing so, they are rethinking what it means to engage community to understand and reflect community goals and priorities in their economic development programs.

The purpose of this white paper is to consider how policy makers, economic developers, and community members can work together effectively to identify and address community goals and priorities in economic development. We begin with an overview of why equitable engagement for economic development is vital for addressing community priorities. This section considers moving toward place-conscious economic development, addressing economic, social, and racial inequities, and creating equitable engagement practices. Next, we present a determine-design-evaluate framework for reviewing responsive economic development practices that are grounded in equitable community engagement. Research methods and case study profiles are provided in this section. The Insights section then highlights lessons learned that reflect the framework and offers examples of how economic development professionals have engaged with the community to determine priorities for more inclusive and equitable economic development and to improve economic prospects for people and the places they live. A brief summary conclusion is then presented.

<sup>1</sup>For example, recent philanthropic investment in equitable economic development learning cohorts led by the National League of Cities, PolicyLink, Urban Land Institute, Living Cities, and others is designed to build capacity of municipalities and incentivize their economic development functions and economic development organizations to intentionally work across departments for solutions that promote inclusive and equitable development (Delgado 2017a; 2017b; 2018b).



# THE VALUE OF ENGAGING WITH COMMUNITY IN ECONOMIC DEVELOPMENT PRACTICE

Economic development that is equitable, inclusive, and impactful for residents begins with engaging communities, prioritizing community input, and clearly aligning that input with programs and priorities. This section describes how equitable economic development can better address the issues facing people, businesses, and places by recognizing disparities and engaging the community to create programs that truly address resident priorities and are place-conscious.

## MOVING FROM A PLACE-BASED TO PLACE-CONSCIOUS ECONOMIC DEVELOPMENT APPROACH

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*Conversations around community engagement practices often occur through the frame of place-based economic development and comprehensive planning processes. Traditional place-based economic development seeks to encourage economic activity and alleviate concentrated economic distress while intentionally targeting a specific geographic area.*

These strategies are often centered around real estate and property development, in which investment usually flows to projects and neighborhoods where the return on investment is the highest (Goodman 2020). The design and implementation of such strategies rarely focus on equitable and inclusive outcomes. They instead emphasize aggregate business and economic growth rather than how investments will affect different types of neighborhoods, people, and businesses. Thus, the efforts do not necessarily embed the need to align the development of the area with the residents' economic and community goals. This is frequently a source of frustration and mistrust for residents, who, despite extensive engagement processes purported to incorporate their goals and priorities, see outside investors benefit from planning, development, and investment activities rather than the people and businesses who have been there all along.

In addition, such development can create greater disparities within cities and across metropolitan areas. A place-based approach that recognizes the need to enhance the capacities of a community in an equitable and inclusive manner would be better able to address inequities by creating economic wealth that benefits the community, growing opportunity for all its residents and businesses, and improving the place in terms of the level of services and community quality of life. We refer to this nuance as a place-conscious approach to the economic development of a place. It requires governments, economic development organizations (EDOs), and other stakeholders to recognize the linkages between people and services that operate across different governmental levels and neighborhoods, and adaptation of the planning, design, and delivery of services and programs (Turner 2015; 2014).

A place-conscious economic development effort is holistic because it seeks to enhance the place while also improving residents' and businesses' connections to many of the established services and opportunities that are located outside of the neighborhood. Place-conscious economic development efforts that integrate community needs, goals, and priorities are programs that can address spatial and economic issues, such as the mismatch of jobs and opportunity, technology, innovation, entrepreneurship, and workforce readiness. Such efforts are particularly relevant in distressed neighborhoods. Place-based interventions that are place-conscious are likely more effective than replicating all services within a single distressed neighborhood because they are collaborative and link horizontally across neighborhoods and vertically through levels of government to address core needs. EDOs can play a critical and supporting role in working to link these efforts to a municipality-wide or regional economic development strategy.



## ADDRESSING ECONOMIC, SOCIAL, AND RACIAL INEQUITIES

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*Current events have also created greater urgency to improve past business and place-centric economic development practices and become more responsive to community priorities.*



The COVID-19 pandemic, recession, and what is likely a long recovery present challenges to state and local governments and EDOs to think beyond their traditional activities (Jordà et al. 2020; Huang et al. 2020). The pandemic created rapid and acute pain with the heaviest blows experienced in the service sector from sharp losses of employment income to devastation of the restaurant, retail, service, entertainment, tourism and travel industries' business models (Hackler 2020; Bernanke and Yellen 2020). Governments now addressing the recovery must recognize the inequitable job impact in the service sector and among small businesses that also threatens the local "neighborhood fabric" in many places.<sup>2</sup>

EDOs are working to help ensure that businesses have the capacity to reopen and rehire their employees, providing services to help them navigate supply chain disruptions, transition from brick and mortar business to digital models, and implement new health and safety regulations. The efforts seek to restore local economies. However, economic development and local government responses should seize the moment to focus on equity, foster more equitable development practices, and embed resilience into the recovery.

Black Lives Matter and the racial justice movement have also prompted new looks at how past business attraction and investment activity have eluded, short-changed or actively contributed to inequality in some communities. In historically disadvantaged locations, the idea of "returning to normal" is not desirable. These communities and cities need fundamental change. Equitable economic development that engages the community around their priorities is vital for understanding desired changes and determining with community guidance the appropriate policy responses. An open dialogue on these matters is essential to working toward racial and economic equity.

## CREATING EQUITABLE COMMUNITY ENGAGEMENT PRACTICES

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*A growing number of economic developers recognize that the severity of economic recessions and growing inequality require a more place-conscious approach but lack a framework for successfully prioritizing and integrating community voices in development. Equitable community engagement is not the same as obtaining public input for a specific project or initiative. Engagement requires a long-term commitment and willingness to take an expansive view of what economic development means to a particular community.*

Equitable community engagement is an essential tool to address the stark economic realities of today. It can confront the effects of marginalized communities, structural racism, and other systemic injustices and address race equity impacts by putting "communities at the center" (Voices for Racial Justice 2015). Leading and participating in equitable community engagement requires all to acknowledge differences and the history of racial and ethnic segregation, be humble and inquisitive, focus on strengths and resilience in communities of color, and reinforce and highlight examples of how addressing the needs and harnessing the contributions of those who need economic opportunity the most will benefit everyone (Patel Shrimali 2020).

In the following section, we propose a framework to show how economic development practices can be more place-conscious and equitable through the use of community engagement practices to determine community priorities, design policy and program responses around these priorities, and evaluate the effectiveness of the resulting activities in meeting community needs.

<sup>2</sup> The majority of jobs lost in the crisis have been in industries that pay low average wages, and women, people of color, and immigrant workers have experienced a disproportionate share of the job losses (Center on Budget and Policy Priorities 2020; Anderson 2020; Long et al. 2020). As of April 2020, there was a historic drop in business ownership that was greater for women, people of color, and immigrant owners (Fairlie 2020). The US Chamber of Commerce's August survey of small business continues to show the strain on these small business owners with 66% of people of color-owned small businesses reporting that they are concerned about having to permanently close their business, compared to 57% for white small business owners. The survey indicated that people of color small business owners were more likely to expect revenues to decrease, to have tried and failed to obtain loans, and report greater concern around reopening and not having enough guidance (U.S. Chamber of Commerce 2020).





# A FRAMEWORK FOR RESPONSIVE ECONOMIC DEVELOPMENT: DETERMINE, DESIGN AND EVALUATE

We developed the following framework to guide our review of how state and local governments engage with the community regarding economic development efforts. The framework is organized around three elements that describe the practice of community engagement to:

- Determine community priorities;
- Design programs in response to priorities; and
- Evaluate the effectiveness of programs in achieving priorities.

Each element enables equitable community engagement to inform place-conscious economic development efforts and create equitable and inclusive outcomes.

## DETERMINE PRIORITIES THROUGH EQUITABLE COMMUNITY ENGAGEMENT

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*Determining community needs, goals, and priorities is essential to equitable economic development. Equitable community engagement recognizes that members of a community are the experts in that community, and, thus, the engagement includes concerted efforts to:*



**Listen to community needs** and provide an opportunity for an open dialogue to build trust. This approach contrasts with engagement that consists of meetings in which the community is merely informed and asked for their opinion. In some historically disadvantaged places, this effort must include recognizing past wrongs and an active effort to rebuild community trust.



**Recognize and actively seek multiple voices** because communities are not monolithic, and integration of the full community, including traditionally underserved and unserved residents, is essential.



**Sustain commitment** to the community and keep promises through transparent, measurable progress that is shared and engenders further community conversations.



**Think holistically** with the community about solutions in order to address wide-ranging community concerns.



The work of the International Association for Public Participation (IAP2) also informed our review. IAP2 suggests a spectrum of participation (engagement) and examples for each type of engagement (International Association for Public Participation 2020). The gradations along the spectrum are attributable to the amount of decision-making power held by the public, with the appropriate level depending on context. The spectrum represents best and leading practices in community engagement and provides standards for our examination of equitable community engagement. The following list summarizes several levels of engagement with examples of what engagement practices could be for each level:

INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
• fact sheets	• surveys	• civics calendar	• citizen advisory committees	• citizen juries
• open houses	• meetings	• workshops	• consensus building	• ballots
• websites/ social media/ influencers	• social media/ influencers	• neighborhood meetings	• participatory decision-making	• delegating decisions
• Youtube	• focus groups	• deliberative polling		
• public access channels	• interviews	• roundtable discussions		
• multilingual radio/tv stations	• public comment/ listening sessions	• news bulletin shared widely		

Source: Adapted from International Association for Public Participation 2018; 2020.

Each type of community engagement obtains information that can enable community goal setting and prioritization. However, EDOs must set expectations and utilize the most appropriate level of community engagement for the project scope and/or task at hand. EDOs should set clarifying parameters such as roles, responsibilities, authority, funding, and feasibility (e.g., legal issues, site constraints). Clearly defining the process to be used to collect community ideas and needs and set priorities is essential to determining community goals and priorities.

## DESIGN HOLISTIC SOLUTIONS THAT ENHANCE PEOPLE, BUSINESS, PLACE AND GOVERNANCE CAPACITIES

*Once equitable community engagement activities are able to define community priorities, EDOs must work collaboratively with the community and stakeholders to translate these priorities into possible solutions and to design new and/or modify existing programs and policies.*

However, community engagement efforts do not end here. Intentional and effective policymaking continues to engage communities when designing programs or initiatives to address priorities (Forward Cities 2020; Voices for Racial Justice 2015; Arnstein 1969). This step provides a space for community leaders to engage residents and work together to obtain input from resident experiences during the design phase so that economic developers can co-create solutions with the community representatives.



Equitable planning processes rely on a grounding in data and strong leadership that allows open interaction with community residents, stakeholders, and community-based service organizations (CBOs). In this framework, EDO staff and community experts are co-equals sharing insights and experience, and the process recognizes that each person should be treated as a resource (Center for Rural Entrepreneurship 2014; California Endowment 2018; Building Healthy Communities, The California Endowment 2015).

An essential addition to the equitable community engagement framework is to think holistically, not programmatically, when it comes to creating solutions that meet community priorities. Neighborhoods may need a full menu of comprehensive interventions of programs, long-term investments, and even basic service delivery requiring increased, coordinated planning across government services. Communities require different approaches and policies to enhance quality of life and connect neighborhoods to regional economies and even larger markets because neighborhoods have their own unique dynamics, comprehensive sets of issues, and concerns that can include vacant lots, blight, public safety, commercial revitalization, housing, small business, financial empowerment, education, health, transit and transportation, opportunities to work, and desire for diverse amenities.

Equitable community engagement translated into place-conscious economic development requires policy design that builds and strengthens core neighborhood capacities and coordination to enable and increase access to economic opportunity. A focus on the capacities of people, business, place, and governance is essential since this is the foundation to generating economic development, community development, and economic growth results.

**THE DEVELOPMENT OF PEOPLE CAPACITY INCREASES INDIVIDUAL OR COMMUNITY SKILLS, KNOWLEDGE, AND EXPERIENCE.**

People capacity focuses on individuals and challenges that influence their potential for economic and community development and opportunity. The question is how best to develop people and workforce skills and education, while connecting individuals to opportunities and attracting others that can complement and further benefit the community.

**THE DEVELOPMENT OF BUSINESS CAPACITY BUILDS LOCAL SMALL BUSINESS OWNERS.**

Business capacity assesses the assets or challenges relevant to business, including workforce (people), facilities and equipment, organization, and the production supply chain. A related and vital component of business capacity is the innovation and entrepreneurial support that exists in neighborhoods and the region that can spur growth among new and existing small businesses.

**THE DEVELOPMENT OF PLACE CAPACITY CREATES DESIRABLE SPACES WHERE PEOPLE ARE COMFORTABLE AND THAT ENABLE ACCESS TO AND PARTICIPATION IN REGIONAL ECONOMIC OPPORTUNITIES.**

Place capacity focuses on the physical and environmental assets (transit, affordable housing, safe drinking water, etc.) or challenges that influence the potential for economic and community development. It is also essential to understand the physical and emotional attachment that residents have with their home, neighborhood, and town/city and the ways in which they feel part of the community.





**THE DEVELOPMENT OF GOVERNANCE CAPACITY USES THE CORE POWERS OF GOVERNMENT AND ITS ABILITY TO SET THE RULES AND REGULATIONS.**

Strengthening the governance capacity and developing reinforcing policies empower a community's leadership and residents to utilize this power to better serve their communities.

Investment across these capacities is essential and most municipal policymaking bodies and the EDOs that support or coordinate with them need to learn to respond differently to community issues. Instead of policies designed in siloed departments (economic development, community development and planning, utilities, code enforcement, etc.), programs and initiatives need to be holistic and integrated solutions that increase and improve the connections of people and businesses to greater economic opportunity. The research in this white paper identifies a number of useful examples of how current community efforts are designing holistic and equitable development programs and initiatives.

## **EVALUATE WITH PRIORITIES FROM EQUITABLE COMMUNITY ENGAGEMENT IN MIND**

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*Evaluation and reporting are necessary for transparency and accountability. Formal reporting on findings helps ensure that community priorities continue to be reflected in economic development practices and identifies when course corrections are needed.*

Evaluations should be linked to community priorities. Worthy metrics must show results in relation to the programs that the community identified as priorities and measure their outcomes and impacts. However, challenges abound in measuring economic development program accomplishments, including program complexity and the multitude of non-program factors that affect economic and community conditions (Abravanel, Pindus, and Theodos 2010). One approach is to articulate how program investments or activities are expected to lead to desired outcomes. A logic model that depicts a theory of causation (or theory of change) for how new program inputs can generate appropriate and measurable outputs, outcomes, and long-term impacts is a useful approach (Center for Regional Economic Competitiveness 2017; Roberts and Khattri 2012).

Separating program indicators with a direct link to economic development activities from those that represent economic impact is often appropriate. Organizations tend to focus their performance monitoring efforts on program output and outcome metrics. Policy makers and community stakeholders are typically interested in organizational performance, but they also may wish to track broad economic indicators to assess progress toward their higher-order priorities, such as racial equity or economic mobility, that transcend individual organizational performance (Center for Regional Economic Competitiveness 2017).

Valid and accessible data sources should be identified for each proposed evaluation metric. Economic development program evaluation has often proved difficult because of a lack of quality data (The Pew Charitable Trusts 2018; Poole and Harpel 2018). Evaluation work frequently requires qualitative data obtained from companies or residents via interviews or focus groups. Disaggregated data by neighborhood, other small geographies, or demographic categories such as race and ethnicity are often not available. Evaluation efforts should include a plan that explains which data will be collected for evaluation purposes, how it will be collected, and how it will be managed and reported (Center for Regional Economic Competitiveness 2017).



Reporting is the final step in the process to provide transparency and accountability to the community. Reporting on priorities is central to ensuring a long-term commitment to equitable and responsive economic development because “what gets measured gets done.” A communication plan can lay out the information that will be shared and explain how it will be disseminated. Publicly available reports will ideally be used to continue to drive progress toward priorities and identify ways to refine programs.

## **RESEARCH METHODS: CASE SELECTION, DOCUMENT REVIEW, AND INTERVIEWS**

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*The research for this white paper utilizes a variety of data collection methods to examine community engagement and how it informs an equitable and inclusive approach to more place-conscious economic development, using the determine-design-evaluate framework.*

We examined a variety of municipal equitable and inclusive economic development efforts that integrated equitable community engagement. A number of these efforts were the result of the equitable economic development learning cohorts funded by the National League of Cities, PolicyLink, Urban Land Institute, Living Cities, and philanthropies (Appendix A) (Delgado 2017a; 2017b; 2018b).

In addition, we conducted case study research for four different economic development efforts in Atlanta, Georgia; Fresno, California; Portland, Oregon; and Upper Cumberland, Tennessee. These cases provide both regional and rural-urban diversity and represent different organizational leads at the city or regional level: Invest Atlanta (the city of Atlanta’s economic development authority), Prosper Portland (Portland’s economic development commission), the Upper Cumberland Development District (a multi-county agency serving local governments), and Fresno Central Valley Community Foundation (philanthropy). Each of the cases profiles either place-based and/or full economic development strategies, and the cases indicate how the approach can be used in either a strong or struggling economy.

Each case explains how organizations are intentionally supporting efforts to raise the voices of marginalized communities that have struggled to access economic opportunity. In three of the case studies, the efforts are grounded in recognition of historical, structural, and systemic racial inequities, while the fourth is focused on helping individuals in substance abuse recovery programs find and maintain stable work. These cases all provide insights into the value of engaging with the community for economic development, while demonstrating contrasting approaches and programs.

The case study research included a review of economic development-related reports and articles and stakeholder and expert interviews with individuals whose organizations are participating in the economic development strategy process, including EDO leaders, government economic development staff, leaders/staff of CBOs, service providers, faith-based organizations, community development organizations, business and small business organizations, educational institutions, and racial equity/social justice organizations. The diverse group of interviewees attempts to capture the perspective of the hardest-to-reach stakeholders and the residents that they serve to understand the setting of community goals and priorities.

The case research examines how EDOs worked with community to determine priorities, design solutions, and evaluate the results. Each of the cases provides an overview of the economic development effort and organization(s) driving the focus on equitable development and investment in people, business, place, and governance capacities. The Case Study Profiles provide a brief description and link to the full case study documents, which are available separately as addenda to this report.



### Invest Atlanta Economic Mobility Plan

The Invest Atlanta case study explores how the city of Atlanta and Invest Atlanta, the city's economic development authority, engaged with the community to create the One Atlanta: Economic Mobility, Recovery & Resiliency Plan. The Plan guides efforts to adapt the Invest Atlanta toolkit to increase economic mobility among Atlanta residents and address inequities while continuing to pursue the organization's mission of "growing a strong economy, building vibrant communities, and increasing prosperity for all Atlantans" (Invest Atlanta 2020).

### Fresno DRIVE: Drilling Down to Address a History of Inequitable Growth

The Fresno DRIVE (Developing the Region's Inclusive and Vibrant Economy) Initiative evolved out of the region's self-realization of historical racial and ethnic inequities and a decision to focus on inclusive and equitable growth. This case study examines the engagement processes behind DRIVE, the resulting investment plans, and steps taken to put racial equity at the core of ongoing activities.

### Prosper Portland: Pivoting to Build an Inclusive and Equitable Economy

Portland, Oregon frequently appears on "best of" lists for livability, prosperity, and sustainability, yet residents experience disparate access to the qualities for which the city is known. This case study explores how the city's economic development agency, Prosper Portland, has worked to address this tension by building internal capacity around equity and community capacity to shape inclusive economic development. The case examines how Prosper Portland uses a variety of programs and policies for inclusive and equitable economic development: Neighborhood Prosperity Initiative, Inclusive Business Resource Network, Council for Economic and Racial Equity, Benefit Agreements, Workforce and Contractor Development, and Budgeting and Evaluation. The case offers insights into the agency's community engagement and how it addresses the needs of people, businesses, place, and governance through these efforts.

### Upper Cumberland Recovery-to-Work Initiative

Upper Cumberland is a 14 county rural region in middle Tennessee that is implementing a Recovery-to-Work ecosystem initiative as one element of a community-wide response to the opioid/substance abuse crisis. Research has shown that stable work is an important element of individual recovery and is necessary to mitigate "diseases of despair" (Meit et al. 2017). This case study explores how community priorities are driving this initiative and describes collaboration among economic and workforce development partners together with treatment and recovery ecosystem partners to design and implement a holistic program solution that will help people, businesses, and place.

The next section provides a lens on equitable community engagement from our research and presents recurring themes and insights about how to improve economic development and community engagement processes to be more place-conscious and best serve the community's people, businesses, and places with equitable economic development, inclusive growth, and economic opportunity.



An aerial photograph of a city is the background. Overlaid on the right side is a large graphic consisting of a red circle with a white arrow pointing downwards and to the left, and an orange circle with a white arrow pointing upwards and to the left. The text is in white, bold, sans-serif font.

# INSIGHTS FROM INITIATIVES TO ALIGN ECONOMIC DEVELOPMENT ACTIVITIES WITH COMMUNITY PRIORITIES

The case studies and research revealed a number of insights that reflect the framework and suggest practical mechanisms for ensuring that local communities' needs are represented in economic development conversations. The insights in this section highlight how economic development organizations, community-based organizations (CBOs), residents, and governments can mold policies to improve economic prospects for people and businesses and the places they live and operate while strengthening the local economy.

The insights also offer a view of how EDOs are working in new and creative ways to integrate community voice into economic development strategies and adapting programs so that they are better suited to tackle community challenges. They illustrate the hard lessons learned about the importance of mutual trust and respect when asking residents to contribute their valuable time and experiences to the process of economic development. In return, EDOs and their partners must honor their commitment to be responsive through programs and practices, provide accountability, and sustain engagement over time as an operational principle.

The work to reflect community priorities in economic development practice is long-term in nature. The case studies and research showed that the determine-design-evaluate framework is about much more than completing a short-term checklist of activities. The insights presented in this section roughly follow the determine-design-evaluate template but are structured to highlight the higher-order lessons learned. They emphasize trust, respect, commitment, accountability, and partnership when engaging with the community to achieve more equitable and inclusive people-, business- and place-based outcomes. The essential takeaway from this white paper is that hard work must be put in and sustained over time to establish relationships built on trust and mutual respect in order to make progress on the issues that most concern residents.

## ACKNOWLEDGE A SHARED HISTORY AND COME TOGETHER AROUND DATA-DRIVEN FINDINGS

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*Initiatives that strive to expand community engagement in order to determine residents' priorities for economic development typically have a narrative with a starting point. That starting point might be a leadership change, release of new data or research findings, a high-profile media story, community reaction to a neighborhood project, or an event that was powerful enough or came at the right time to prompt changes in standard economic development practices. Almost always, the starting point is in the middle of an ongoing story and is embedded in the community's history of economic development. Establishing trust and ensuring stakeholders and residents feel valued in the engagement process builds from a common understanding of that history.*

Past history and current data that can illuminate priorities are both necessary elements. Acknowledging the history is just as important as creating a common understanding around the current challenges that the community wants the economic development effort to address. The narrative that is provided by the history and the data guides new approaches, confirms values, and embeds processes that ultimately provide accountability for actions that reflect priorities and values.

In Fresno, the DRIVE Initiative is a 10-year community investment portfolio striving to achieve greater economic mobility by fostering a more inclusive, vibrant and sustainable economy. Early DRIVE convenings shared community data analysis that indicated that economic growth had not benefited all residents and that economic development needed to be addressed in an inclusive and equitable manner. The data evidence of historical racial inequities prompted the DRIVE executive and steering committees to establish the Race Equity Advisory Committee (REAC), and the REAC hosted events, workshops, and learning opportunities for the participants of DRIVE to develop a 'shared analysis' of race history and current realities in Fresno. DRIVE's adopted theory of change reflects this shared analysis: Fresno's path to economic growth must transform infrastructure and systems that enable historically excluded racial minority communities to prosper. The efforts also ensure the initiative's investment work plans and ongoing community engagement continue to address racial economic disparities and sustain a commitment to truth telling (Central Valley Community Foundation 2019).

At Prosper Portland, the city's economic development agency, investments in internal anti-racism work set the foundation for equitable engagement by acknowledging the history, understanding implications, and building capacity for the organization to more effectively engage the community. In addition, the agency shifted to ensuring that there was a stronger equity lens on programming and data. When the agency's COVID-19 response went out, there was deep community engagement, strong transparency, and an embedded equity lens to data.

The Invest Atlanta Mobility Plan was motivated by national research reports (Berube 2018; Foster and Lu 2018) documenting the city's worst-in-the-nation income inequality combined with a new mayor's focus on addressing historic economic disparities within the city. The Mobility Plan's community engagement activities were then built around sharing findings and soliciting input on a set of proposed pathways to economic mobility stemming from detailed research and analysis on city conditions from Enterprise Community Partners, which created a common framework for prioritizing initiatives.

Albuquerque, New Mexico, recognized its history of ignoring community voices in planning and development projects during outreach conducted for the Rail Yards project, a long-stalled



redevelopment of a 27 acre Santa Fe Railroad maintenance site in an economically disadvantaged area. The city's 2019 outreach included community voices that were marginalized or neglected in the 2014 master planning effort. Residents indicated that they had lost considerable trust in the city's ability and/or willingness to take their input seriously, feeling that the planning effort was an exercise of tokenism since promises had been made and broken (Isaac 2019). The 2019 efforts ramped up focus groups and listening sessions with residents of the neighborhoods that adjoin the Rail Yards, representatives of community-based organizations (CBOs) in the adjacent neighborhoods, for-profit and nonprofit entities located in and/or working in the adjacent neighborhoods, the small business community, and governmental agencies with development responsibilities in the adjacent neighborhoods.

## **EVOLVE ENGAGEMENT FROM INFORMING TO LISTENING, LEARNING, AND PARTNERING**

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*Community engagement or public participation can occur at many different levels. At lower levels, the public is informed or consulted, sometimes with placation in mind and sometimes with a genuine desire to engage, but in both cases the level of resident influence on actual decisions is minimal. At higher levels, residents are engaged to affect, recommend, or be responsible for decisions (Arnstein 1969; International Association for Public Participation 2018).*

Economic development organizations often have experience with informing or consulting residents on projects or initiatives, but case studies and review of EDO practices show that they are at the early stages of integrating higher level engagement processes into their work.

Equitable community engagement suggests that the greater diversity of stakeholders are not there merely to be informed and consulted for input on the EDO's proposals and plans. Equitable community engagement is dedicated to understanding and embedding this understanding into new policy approaches that can address the pressing issues that community and residents face. Engagement of this caliber takes more time and is more respectful of participants because it involves deeper sharing and trust that all stakeholders are working toward greater and more equitable economic outcomes.

The EDOs involving residents at a higher level give the community a voice that allows for the setting of community goals and priorities. The EDOs that moved further — collaborating with and empowering the community — combined program and initiative design/redesign with shared implementation and evaluation. This manner of participation does not have to occur as a formal, standalone process called “engagement.”

One example of this approach came from the Upper Cumberland, Tennessee, Recovery-to-Work ecosystem project, which strives to help individuals in substance use recovery succeed in the labor market. A strong regional network addressing substance abuse issues already involves residents, elected officials, government agencies, community-based organizations, and service providers across the region. For example, residents from all walks of life participate in county-level anti-drug coalitions. These coalitions have varying levels of sophistication and capacity, but they are all valued partners to the Substance Abuse Solutions program at the Upper Cumberland Human Resource Agency (UCHRA). UCHRA has offices in and a board representing each county. As a direct service provider it is connected to residents and can give voice to the needs they see. Elected county officials serve on the boards



of both the Upper Cumberland Development District (UCDD) and UCHRA, voicing local priorities and resident concerns when programs are created. The Recovery-to-Work initiative itself stemmed from a need articulated by both the recovery community and local governments to find ways to help individuals in recovery obtain stable employment and good quality jobs. While there is not a formal engagement process to point to, residents have several avenues through which to affect, recommend and, in some cases, be responsible for implementing policy decisions to address the region's opioid crisis, including those related to the recovery-to-work ecosystem.

Fresno's equitable economic development strategy and place-based efforts suggest the need to be clear on where in the process different levels of engagement are critical to produce the types of interactions and results needed to propel the effort forward. Fresno DRIVE's current implementation of investment work plans includes a voice for community in investment plan structures, a resident leadership council, and via multiple methods of ongoing engagement, even during the COVID-19 pandemic, to continue listening, learning and partnering past the initial round of engagement.



**MULTIPLE  
METHODS OF  
ONGOING  
ENGAGEMENT**

In Houston, Texas, the Complete Communities program relies on an interdepartmental team of dedicated staff who work with a neighborhood to identify priority projects and develop or support implementation strategies over a six to nine month period (City of Houston 2020). Each neighborhood varies in the level of neighborhood pre-planning, and for areas without previous neighborhood planning efforts, the community engagement process is the primary focus. The program seeks to improve neighborhood services and amenities while working closely with the residents of communities that haven't reached their full potential, understanding their strengths and opportunities, and collaborating with partners across the city to strengthen them.

Minneapolis, Minnesota's Strategic and Racial Equity Action Plan (SREAP) stems from a two-year comprehensive planning process that interconnects policy ideas the community lifted up. The plan identified a set of operational and policy priorities, such as the Community Planning and Economic Development effort to increase the number of Minneapolis-based businesses owned by Black, Indigenous, and People of Color (City of Minneapolis 2020). The Strategic Racial Equity Plan and Minneapolis 2040 Comprehensive Plan is reinforced with a new Minneapolis Neighborhoods 2020 Program that centers engagement on building equity. The plan creates an equitable civic participation system that enfranchises everyone and builds people's long-term capacity to organize and improve their lives and neighborhoods (City of Minneapolis Neighborhood & Community Relations 2020).



## GROW THE CIRCLE BY BUILDING TRUST AND RESPECT

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*Many traditional economic development strategies do not involve a diverse array of stakeholders beyond business, government, and workforce partners, nor do they prioritize a deep level of commitment to community engagement and collaboration with residents and smaller businesses in the places in need of economic development opportunities.*

These conventional practices may result in those left out of the planning feeling discounted, unvalued for their expertise, and skeptical of the resulting policies. However, the CBOs, faith-based organizations, and minority and ethnic chambers that build neighborhood assets, businesses, and/or people's power know their work and insights on what's happening on the ground are important inputs for economic development activities. Across the board, the equitable economic development and equitable community engagement efforts in our research were intentional about building trust and respect for all participants' expertise and knowledge so that all felt valued for their roles.

Expanding the normal stakeholder effort beyond the traditional business and planning interests in the community is difficult due to lack of capacity, resources, and even awareness of other diverse voices that should be part of the process. Even with the intention of equitable community engagement, it can still be difficult for economic development organizations to connect with underserved, unserved, and unheard residents.

In Portland, the economic development agency recognized that community trust was low due to decades of redevelopment efforts that had resulted in unfulfilled promises, negative impacts of displacement, and little benefit to populations that had historically been excluded from opportunity. The agency committed to becoming an anti-racist organization and changing priorities and practices to focus on inclusive and equitable place-based economic development. This turn was signalled by its rebranding from the Portland Development Commission to Prosper Portland. Prosper Portland's Equity Framework addresses the history of the organization and its equity journey and includes its guiding Equity Statement, Equity Model for Change, Cultural Agreements, and Meeting Agreements. Their approach centers on the essential work of advancing racial equity and transforming its engagement, partnerships, and investments to create equitable opportunities and impacts through their efforts (Prosper Portland 2019b).

### **MULTIPLE VOICES**

The desire to expand engagement and reach new voices was consistent across nearly all the case studies and processes examined. The challenge is that this work is time consuming and requires deep community connections that some economic development organizations lack. Assessing the work to expand networks to hear more community voices is also difficult. Detailed demographic data is not typically collected on each resident who participates in meetings, surveys, and events. Trying to obtain such information for individuals choosing to participate may be considered off putting, and some residents may not feel comfortable disclosing demographic or other types of personal information.

National and local organizations have created guidelines to help communities improve their outreach so that they engage more residents and hear more diverse voices (Forward Cities 2020;





Zimmerman 2020; Neighborhood Improvement Services, City of Durham 2018). In practice, locations have also done a great deal of work to expand their engagement work in recent years. In 2016, Memphis, Tennessee, initiated its first comprehensive citywide master plan since 1981. Memphis 3.0 engagement efforts utilized 12 city-wide involvement partners to reach their extensive networks of hard to reach populations like families experiencing poverty or homelessness, people with disabilities, non-English speakers, and seniors. These partners included a broad range of stakeholders among nonprofits, churches, and community groups. In addition, the Office of Comprehensive Planning (OCP) partnered with BLDG Memphis (a network of community development corporations) and the Urban Art Commission to utilize the arts community to help with engagement. Elsewhere, Louisville, Kentucky, used its Vision Russell planning process to reach residents of public housing, youths, and neighborhoods throughout the city, working with clergy and religious institutions, outreach workers who canvassed the neighborhood, and residents trained to conduct surveys in their own communities.

Organizations often recognize the need to substantially expand their outreach but even with good guidance on how to do so, it takes time to conduct public participation activities that are meaningful to all participants and sustain the effort to build relationships that allow engagement to result in changes to priorities and programs. The experiences of the case study communities suggest that a slow and steady grounding effort to expand the circle of stakeholders is a more realistic scenario than leaping immediately to a completely inclusive engagement process.

Fresno's efforts recognize that each community has a set of trusted messengers and social influencers that are the locus of communication, such as running Facebook groups. DRIVE intends to rely on these influencers to help residents learn about DRIVE, help refine investment work plans for implementation, and distribute information to those least likely reached. Invest Atlanta is establishing a physical presence in the south side of the city and building relationships with neighborhood-based groups and community organizations that serve residents in that area so that programs will be more responsive and useful. It will also build on the relationships nurtured during the creation of its Mobility Plan to expand the circle and establish productive partnerships to accomplish the plan objectives. Upper Cumberland is striving to bring more workforce and business perspectives to the conversation around addiction and recovery by involving chamber representatives, workforce development leaders, and technical college participants in the Recovery-to-Work initiative.



## VALUED AND EQUAL ROLES

The analysis revealed practices that go well beyond listening to or engaging multiple voices for its own sake. Fresno and Atlanta both provide examples where an expanded set of stakeholders had valued and equal roles in setting priorities. In Fresno, representatives of community and neighborhood groups were concerned about having a voice with weight at the table in order to lift up and gain commitment to understanding and addressing systemic injustices. A process of open dialogue worked to equate business voices with community organization voices and built a shared understanding that the “people power” of residents is just as important as a neighborhood’s physical assets and business interests. In Atlanta, business interests and community-focused groups were each powerful in their own circles. The Mobility Plan convened them around a common goal and set the stage for an ongoing and sustained partnership. Both cases demonstrate the importance of respect for the others’ expertise and personal experience.

## THE POWER OF CONVENING AND CONNECTING - NETWORKS OF NETWORKS

Convening and connecting multiple voices to build relationships and enable cross-sector collaborative partnerships to take on community-wide challenges can be economic development’s superpower. Economic development organizations already work across government agencies and collaborate with a variety of private and public sector partners to support their business development mission. Widening the lens to identify and take on new missions organized around community priorities means EDOs can build on this strength to create a shared story, develop respect for each others’ areas of expertise, and foster cooperation rather than competition among organizations.

A network of networks describes how some of the case study communities manage this process. In the Upper Cumberland area, the overlapping networks include the UCDD and its member counties, UCHRA and its county offices, and the county-level anti-drug coalitions. UCHRA and UCDD are both part of statewide Tennessee structures. UCDD is also part of the Development District Association of Appalachia and the Appalachian Regional Commission. The anti-drug coalitions can access the resources of their statewide and national associations. These multiple networks stretch across the region but also reach down to the community level and up to the state and national levels. The network of networks provides for an exchange of information, capacity building, and access to technical assistance, and most importantly, creates a highly valued peer network. The peer network in particular is the source of trust and shared experiences that enable partners in the region to work together to address a multi-dimensional substance abuse crisis.

The inclusive convening process of Fresno DRIVE creates a “bigger tent” for Fresno’s economic development conversations such that the DRIVE stakeholders specifically refer to their structure as a “network of networks.” There is greater shared knowledge of how each organization contributes to Fresno and has resulted in



opportunities to work together and leverage influence for funding that parallels DRIVE's values and initiatives. For example, a number of social and health organizations worked together to obtain funds from Fresno's distribution of Coronavirus Aid, Relief, and Economic Security (CARES) Act funds to address COVID-19 testing in harder to reach, disadvantaged populations. A participating organization leader voiced that this was one of the first times that the power of DRIVE's convening process translated into the DRIVE network of networks coming together for a joint proposal instead of competing for individual funding opportunities. Coming to a common understanding that competition for funds in a scarce resource landscape is not as impactful as cooperation among community groups is one of the main benefits of the network of networks mindset.

Prosper Portland convenes the Inclusive Business Resource Network (IBRN) as a community of practice. Members of the IBRN provide business technical assistance to underrepresented and culturally specific entrepreneurs and businesses. The network meets monthly to share ideas, resources, recognitions, and lessons. The network is viewed as welcoming and community driven, which is no small feat given that the member organizations were working in isolation and often in competition with each other for contract funding. A significant innovation is the way businesses (clients) are served across the member organizations — focusing on a user's journey across the entrepreneurial ecosystem and overall outcomes for the business. In addition, IBRN members developed shared metrics and created a shared reporting platform that iterates based on feedback loops and outcome-driven data. Operating as a learning community and utilizing shared metrics is moving the organizations from a zero sum, siloed mentality to a collaborative and customer-centric approach.

## PROVIDE CLARITY ON ROLES, RESPONSIBILITIES AND AUTHORITY

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*The process of community engagement also needs to be carefully managed, with clear expectations set on how the process works and well-defined roles and responsibilities so that engagement is respectful of people's time and contributions.*

The Portland case study demonstrates the need to “thoughtfully set the table” because it is not sufficient merely to convene a meeting or an advisory group. Careful attention needs to be given to who is invited and who is left out, cultural competencies and differences, how the engagement facilitates voice or silence, what agreements and norms guide participation, how the process cultivates thoughtful discovery and deliberation before decisions are made, and what clarity is provided regarding roles, responsibilities, resources, and authority.

Portland stakeholders identified the need for clear parameters for community input. This includes providing clarity about the purpose and desired outcomes of specific committees and engagements, shared definitions, boundaries regarding the feasibility of options due to budget or legal issues, the relationship to other committees and processes, the role of the members or participants, and what they are empowered to do (e.g., input, decisions).



Fresno has committed to “set the table” to empower engagement that supports the region's DRIVE initiative. The Race Equity Advisory Committee (REAC) will work with investment plan working groups on the implementation of DRIVE investment plans through DRIVE’s shared power framework and transformative community engagement plan. For example, REAC and the Civic Infrastructure for Low Opportunity Neighborhoods working group will do an assessment of CBOs to identify opportunities to build capacity for ongoing resident engagement and recruit and train a forthcoming Resident Leadership Council that will help redesign and implement the investment plans.



## COMMIT TIME AND RESOURCES FOR RESPONSIVE PROGRAM DESIGN AND IMPLEMENTATION

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*Equitable community engagement and economic development is a commitment — perhaps the motto should be “only engage if you’ll follow through.” The allocation of sufficient time and resources to accomplish the desired change should be anchored in a systems perspective that cultivates authentic relationships with diverse community members. A second motto may need to be “view the community as both your client and partner working to co-create a new future.”*

Funding for economic development and engagement work is a prerequisite, but diversification of funding streams is also critical to the work’s longevity. Public sources of intergovernmental funds include own-source and the leveraging of state and federal direct and/or grant funds. A community’s anchor institutions are commonly “invested and contributing” stakeholders, such as chambers and business councils, workforce and transportation organizations, and educational and healthcare institutions. Not to be overlooked is a committed philanthropic partner that adds capital and often a nuanced stakeholder community that is inclusive of a more diverse set of organizations, particularly those directly serving the residents. These multiple funding streams can help weather storms that threaten the short- and long-term horizon of the strategy and engagement. Only with a commitment of resources can all parties and residents trust that all are working together for the long haul beyond what many characterize as normal economic development: “we always do strategies, but nothing gets implemented nor is it accountable.”

**DIVERSIFICATION  
OF FUNDING STREAMS  
IS CRITICAL TO THE  
WORK’S LONGEVITY**



## RESOURCES FOR THE ENTIRE PROCESS

Funding and resources are vital to transitioning visions and plans to viable projects. Moving from strategy to action requires organizations to plan for costs associated with coordination among stakeholders, support of the planning process and working groups, securitization of funding to advance and continue implementation, and essential staff and overhead costs for the organizations that will be accountable for the work.

In Portland, many of the community based stakeholders are under-resourced organizations, and their leaders and other individuals who contribute their time, ideas, and emotional labor without compensation report that the process can feel extractive and exploitive. For the economic development organization staff participating on staff time, this can be written into their budget. For individuals serving in an appointed capacity, while there may be limits on compensation by a public agency, it would be helpful to find other ways to fund engagement. Beyond the minimums of paying for food, transportation, translation, and childcare, EDOs should not discount this need and seek foundation partners or others to sponsor participation in engagement activities. Fresno DRIVE receives some resources from stakeholder business partners, but without the state of California and James Irvine Foundation's philanthropic funding, many of its costs would not be covered. However, it is thanks to the generous support from Irvine that the DRIVE participants who are representing their organizations on work plans receive compensation for their time.

Funding for implementation should also be identified. Houston's Complete Communities program attempts to diversify funding streams across the city's current operations funding, uncommitted discretionary funding, and external community partners to fill gaps (City of Houston 2020). Invest Atlanta is primarily self-funding its Mobility Plan activities, supplemented with CARES Act funds for recovery-related programs. Partners are expected to contribute to initiatives that support the Mobility Plan's pathways that require more than the Invest Atlanta toolkit, but there is not yet a process in place to secure those commitments. Without dedicated funding, participants acknowledge it will be difficult to sustain Mobility Plan efforts. The same is true in Upper Cumberland. Initiative leaders are working to identify a sustainable funding source that does not rely on project grant cycles.

Nashville Made serves as an example of the need for funding and the political will to attain its desired outcomes and impacts. Nashville Made is a business accelerator program for small local manufacturers to assist them in creating and developing local branding awareness and initiatives. The city helped start it as a benefit corporation and focused its equitable economic development effort in the Wedgewood-Houston neighborhood (Delgado 2018a). The neighborhood has a number of smaller urban manufacturing companies and is adjacent to a large public housing development. The goal is to increase the number of quality manufacturing job opportunities for the low-income residents facing gentrification



pressures from higher-end infill residential development. Nashville Made currently has 23 local manufacturing members that are connecting to source materials, share labor, and take on joint projects. However, to scale Nashville Made, it needs capital, and the city is no longer playing a major financial role due to electoral and leadership transition, the recession, and the COVID-19 pandemic. Thus, limited city staff alongside the Urban Manufacturing Alliance are working to access innovative, mission-driven capital providers to create a patient capital fund for Nashville Made (Urban Manufacturing Alliance 2020).

## **SUPPORT SERVICE DELIVERY AND CAPACITY BUILDING**

Economic development organizations are not typically able to deliver on all identified community priorities. They must partner with a variety of organizations and can often help by supporting delivery and building capacity among direct service providers. In many cases, CBOs will serve as intermediaries for small direct service providers, helping with mobilization of funds, grant distribution, training, advocacy, standards-setting, quality assurance, and data collection (Piha 2014). Economic development programs may be in a position to help resource the intermediaries' coordination and delivery of services that enable them to be stewards of community engagement. Resource options and tools may range from space and physical infrastructure to capacity building and training of staff on services and interaction with community (e.g., racial diversity and language training, dealing with conflict issues, etc.).

Prosper Portland and the members of the Inclusive Business Resource Network developed shared metrics and a shared reporting platform. Previously, the structure of the small business assistance program did not yield an effective user experience for businesses and the focus on reporting outputs did not produce meaningful insights regarding outcomes for businesses. While these shared metrics serve as an evaluation of each provider, Prosper is responsive to supporting network members and addressing their needs if they don't meet the standards, instead of abandoning them. Rather than cutting the provider from the network, Prosper Portland focuses on building their capacity.

Fresno DRIVE's Civic Infrastructure for Low Opportunity Neighborhoods work plan also focuses on capacity building. The plan will establish hubs in six extreme-poverty neighborhoods, and these will serve as a formal support network for the CBOs serving these neighborhoods. The plan is for each hub to have 50% of its staff from the neighborhood, serving as a job pathway for residents while increasing community human capital resources. In addition, 1,000 residents from across the neighborhoods will annually complete training for community-building and leadership skills, and over 800 residents (adults and youth) will actively engage in at least one community development and/or improvement project in their neighborhood each year to further develop leadership capacity and shared ownership in improving the economic outcomes at the neighborhood level. The hubs' planned levels of engagement are essential to building civic infrastructure and highlight the need for



committed resources to sustain this level of engagement. Another DRIVE work plan, Second Office, will also build capacity for resident input and design of an “Economic Development Community Scorecard” to guide future equitable business attraction (Central Valley Community Foundation 2019, 43).

Other locations may not hit all of these points but have still taken important steps to commit to capacity building in a manner respectful to participants. For example, Houston’s Complete Communities Initiative created Neighborhood Support Teams to guide neighborhood action plans, and implementation is led by action task force teams that work with city staff to ensure that established benchmarks are achieved.<sup>3</sup> Houston also offered Complete Communities University to build capacity and strengthen the skills of community leaders to implement the goals and actions within their community plans.

## PLAN FOR SOLUTIONS THAT TRANSCEND PROGRAM OR AGENCY BOUNDARIES

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*Many of the economic development strategies using inclusive and equitable engagement processes transcend a single agency or program because they may target neighborhoods or places in need of economic development and incorporate city— or region-wide initiatives.*

A place-conscious approach to economic development also often necessitates modifications of existing city and regional strategies to recognize the linkages among people and place, especially regarding job opportunities and delivery of government services and programs. Reflecting community priorities in economic development practices requires understanding these linkages and developing holistic, collaborative responses.

Co-creation and collaboration at the community or neighborhood scale is at the core of Houston’s Complete Communities program. Their engagement process starts with a data book that helps local residents and businesses identify improvements needed to strengthen their communities and identifies leadership partners to push the plans forward. The result is a neighborhood action plan that includes a variety of goals and priorities ranging from civic engagement and housing to the economy and jobs that require holistic investment in people, business, and place capacities. Complete Communities is part of citywide planning efforts that shape decision making and public investment, like the annual Capital Improvement Plans, the Houston Parks and Recreation Department’s 2015 Parks Master Plan, and the Houston Bike Plan (City of Houston 2020), and most of the neighborhood plans mention that they were informed by these other city plans (City of Houston 2018, 7). Thus, each neighborhood’s identified goals, projects, and priorities corresponds to these plans as well as additional neighborhood or community-based organization plans.



Prosper Portland’s Neighborhood Prosperity Initiative (NPI) is a network of seven “mini-urban renewal districts.” The place-based initiative was an outgrowth of the agency’s 2011 Neighborhood Economic

<sup>3</sup> See for example [https://www.houstontx.gov/completemunities/acreshome/CC-AH\\_ActionPlan\\_2018.pdf](https://www.houstontx.gov/completemunities/acreshome/CC-AH_ActionPlan_2018.pdf)



Development Strategy. NPIs are located in existing urban renewal areas that have lagging commercial investment and lower income/higher poverty rates, a concentration of minority-owned and/or serving businesses, a concentration of locally-owned businesses, commercial zoning/use, and business/community organization capacity. Each NPI is guided by a community-based board and led by a district manager that the board hires. Each NPI defines its own programs, but there are also similarities among the areas such as the provision of investment in people and business through workforce navigation, storefront improvement, and business support. Prosper Portland launched the program in 2012 with investments in governance, leadership training, and district development, and the agency provides technical assistance, training, and financial contributions toward administration and operations, promotions and branding, and district improvements. As with the IBRN program, Prosper convenes the NPI network members as a community of practice to share resources and build capacity for community-defined, community-benefiting development.

## INVESTING IN PEOPLE, BUSINESS, PLACE AND GOVERNANCE CAPACITIES

Across the cases, the economic development efforts focus on investing in the capacities of people, business, and place with governance structures and/or policies that can support the strategies.

**FRESNO DRIVE** Fresno DRIVE has a total of 18 investment plans supporting the priorities of economic development (business), human capital (people), neighborhood development (place), and the design of equitable policies to influence and hopefully guide the use of local public resources for future economic development. DRIVE is pursuing funding and further implementation for all of the investment plans, but recent June 2020 philanthropic funding from the Irvine Foundation leveraged with stakeholder partner funding is advancing five specific plans:



**People and Place:** The Civic Infrastructure for Low Opportunity Neighborhoods investment plan establishes a formal support network of hubs for CBOs in six extreme-poverty neighborhoods.



**Business and Governance:** The Second Office Fresno investment plan develops an Economic Development Community Scorecard informed by community engagement and will create a new business attraction strategy that identifies specific industries, businesses, and job opportunities that align with community priorities.



**Business:** The Betting Big on Small Businesses Owned by Women and People of Color investment plan will improve the representation and success of small businesses owned by women and people of color.



**People:** The Wealth Creation in Communities of Color investment plan focuses on assessing resident needs and the existing “financial stability and wealth building” activities being undertaken by Fresno CBOs and employers.



**People:** The Upskilling investment plan forms a regional coordinating Career Network Hub that strategically aligns employers, workforce development systems, government, and community partners to deliver high-quality, paid work-based learning opportunities for Fresno workers and partners.





## UPPER CUMBERLAND

The Upper Cumberland Recovery-to-Work initiative seeks to support the creation of an active ecosystem of regional organizations working together to help individuals in recovery succeed in the labor market and to help companies find and support those individuals. The region is building a hub and spoke system to eliminate dropped handoffs in the recovery process for individuals, recognizing that recovery may take years and require an extensive array of support services. A primary goal of the initiative is to bring employers, workforce development providers, and education and training organizations into the ecosystem so that individuals in recovery can be placed in stable jobs.



**People:** The initiative is working with intake and treatment partners to meet the needs of individuals wherever they are in the process of recovery; providing training and wraparound support services; and helping them connect to work opportunities.



**Business:** One goal is to help local businesses meet their workforce needs by expanding the pool of eligible workers and providing services to both the business and employee to improve retention.



**Place:** The lead regional organization is providing resources and support to local governments and service providers overwhelmed by the costs and demands related to substance abuse, while offering capacity and expertise not available at the county or municipal level.



**Governance:** The Upskilling investment plan forms a regional coordinating Career Network Hub that strategically aligns employers, workforce development systems, government, and community partners to deliver high-quality, paid work-based learning opportunities for Fresno workers and partners.



## INVEST ATLANTA

Invest Atlanta's Economic Mobility, Recovery & Resiliency Plan identifies pathways and policy recommendations to improve economic mobility based on input from residents, businesses, civic and not-for-profit leaders and other stakeholders (City of Atlanta 2020). Goals include enabling equitable access to opportunity, 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 the poorer, majority black communities to the south and west (Enterprise Community Partners 2020). Five objectives describe how Invest Atlanta, WorkSource Atlanta, and other partners will adapt their programs to work toward those goals across the four capacities.



**People:** The People/Workforce pathway includes asset/wealth building, workforce health and well-being, workforce capacity and access to employment, and workforce housing stability. A related Education pathway addresses early childhood education, pre-K through high schools, and higher education. The access to good jobs objective emphasizes training opportunities that can connect residents to quality jobs.



**Business:** The Economic System pathway covers economic growth; job wages, character and benefits; and entrepreneurship and small business. The job creation objective reinforces and focuses business attraction work on the job quality metrics and fit with residents' workforce needs. The small business objective directs Invest Atlanta and partners to help startups and small businesses from disinvested neighborhoods.



**Place:** The Place pathway incorporates neighborhood health and safety; access to employment, including transit; and neighborhood social capital and cohesion. The neighborhood investment objective emphasizes attracting more investment to disinvested neighborhoods in order to create opportunity for residents. The affordable housing objective focuses on helping residents generate wealth and stay in their homes as well as incentivizing more affordable housing units.



**Governance:** The Mobility Plan and its key performance indicators will guide the work of Invest Atlanta, WorkSource Atlanta, and its partners to adapt programs and policies to attain the Plan's objectives.



## PORTLAND

Portland's 2015-2020 strategy for inclusive place-based economic development called on the organization to "establish new models for community engagement and decision-making that provide equal access and opportunity to [Prosper Portland] resources, regardless of level of wealth or influence" (Portland Development Commission 2015).



**People and Business:** Leverage and maintain Portland's economic competitiveness and create access to high quality employment by supporting traded sector business growth, access to new domestic and foreign markets, and connections for Portland residents to quality employment opportunities across both traded sector and local serving industries.



**Business and Place:** Increase equitable opportunities by growing small and promising new business ventures, commercializing research, and supporting real estate ownership and development that fosters wealth creation within communities of color and low-income neighborhoods.



**Place:** Strengthen Portland's communities by striving to build and increase access to healthy, complete neighborhoods — those with essential goods and services, transportation options, connections to employment centers, and community and open spaces—throughout Portland.



**Governance:** Align efforts by forming 21st century civic networks, institutions, and partnerships to address the most pressing barriers to prosperity and establish creative, effective, silo-busting solutions.



**Governance:** Model the values of this plan and maintain the agency's ability to be an agent of positive change in the city of Portland by operating an equitable, innovative, and financially sustainable agency (Portland Development Commission 2015, 10).

## DEVISE "JUST RIGHT" METRICS THAT PROVIDE ACTIONABLE INSIGHTS

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*Metrics and public reporting are necessary for transparency and accountability to the community.*

However, selecting the right set of indicators that capture the long-term and multi-faceted outcomes that make a difference to people, business and place is a challenge, as is ensuring that there is a tenable connection between the action and the outcome. Resources are rarely made available to support the hard work of identifying or developing valid data sources, collecting and analyzing the information, and presenting data in a reporting format that is both informative and interesting.



## METRICS ALIGNED WITH PRIORITIES

Economic development agencies are challenged to identify performance measures that speak to community priorities while providing useful feedback on outcomes within their sphere of influence. The selected measures of success should be within the control of the EDO and stakeholders so that performance can be assessed, but also describe progress toward overall goals. Broad socioeconomic indicators have their place, but should not be solely relied upon for reporting purposes. Selected metrics should have identified sources of readily collectable data to be able to report on progress over time across initiatives and for the overall strategy.

### LOGIC MODELS

A logic model provides one approach to identifying appropriate metrics by connecting actions to program priorities. The W.K. Kellogg Foundation defines a program logic model as a picture of how an organization works that links outcomes with program activities/ processes and the theoretical assumptions/principles of a program (W.K. Kellogg Foundation 2004). Three of the four case study communities — Upper Cumberland, Atlanta, and Fresno — used logic models to identify input, output, and outcome metrics that connect their activities to priorities; one explicitly referenced the Kellogg guide in doing so.

The Upper Cumberland project leader prepared a logic model showing how services offered through the Substance Abuse Solutions' proposed hub and spoke delivery model can lead to better outcomes in the community and for participating individuals. Ultimate success is not to be measured by statistics about services provided, but by a change in community and employer attitudes in regard to the hard work of recovery and how it can be treated with respect rather than shame. Inputs include funding, strengthened capacity among partners and core organizations, and community and political support. Outputs include the number of clients enrolled in programs, the percentage completing a 2-year program who meet certain recovery standards, the percentage placed into jobs and training, and the number of companies asking for their clients to fill jobs. The proposed output metrics take a longer-term outlook than typical recovery or treatment indicators that tend to look at short-term achievements such as successful program completion or those that remain sober a week or month later. The proposed outcome metrics try to capture shifts in community attitude toward individuals in recovery, including individuals completing the program with respect for themselves, regional job market (employers) with respect for individuals in recovery, and residents of the region who have respect for individuals in recovery.

The key performance indicators (KPIs) developed for Invest Atlanta's programs also strive to measure impact rather than activities. Working backward from the objectives the Mobility Plan wanted to achieve, the project considered the outputs and activities that would deliver the desired impact. The KPIs address activities/outcomes such as helping businesses create 6,000 direct jobs, meeting wage, benefits, and career standards, and supporting small businesses to increase employment and become financially stable (City of Atlanta 2020). In



Fresno, DRIVE's theory of change describes outcomes related to race equity that will be embedded in each of the investment plans. Examples of outcomes under consideration, per conversations with DRIVE stakeholders, include job creation across all sectors, with a focus on those that provide opportunities for increasing diversity and inclusion; increasing economic prosperity and mobility through higher paying jobs across all income levels and racial groups; increasing the number of leaders that are people of color; and the proportion of funding going toward development of people, power sharing structures, and plans that benefit people of color.

## ENGAGEMENT METRICS

As communities improve their outreach so that they engage more residents and hear new diverse voices, they are also trying to measure their effectiveness at doing so. Most continue to report on the number of residents participating in outreach and listening events, but more are attempting to categorize participants by demographic and geographic categories to ensure that they are engaging multiple voices across the community and that participants reflect the community. They are also tracking the number and types of community organizations they work with to expand their reach. Some national organizations offer guidance on engagement methods and metrics. For example, Strong, Prosperous, And Resilient Communities Challenge (SPARCC<sup>4</sup>) recommends using indicators of increased diversity, engagement by specific stakeholders such as members of historically underrepresented communities, and representation on boards or commissions (Zimmerman 2020).

Communities are implementing some of these practices. The Minneapolis, Minnesota, Office of Neighborhood and Community Relations has a dashboard presenting progress on its Blueprint for Equitable Engagement strategy (City of Minneapolis Neighborhood and Community Relations 2018). Metrics tracked in the dashboard include diversity of appointed boards and commissions, measures of resident trust and influence, multilingual radio shows and language services, fund allocation to neighborhood programs and community participation, diversity of neighborhood boards, community conference attendance and demographics, and community engagement participants and outcomes. However, it is not clear if the indicators are updated. Separately, Minneapolis city stakeholder engagement summaries describe previous events, locations, number of groups/organizations represented (by location, ethnicity, and affiliations), and total number of people engaged (City of Minneapolis 2019). The city's Neighborhoods 2020 Program Guidelines provide objectives for equitable engagement, such as engaging under/unrepresented residents meaningfully on policies and programs and assessing whether under-represented or under-engaged residents are informed, connected, and feel represented and heard (City of Minneapolis Neighborhood & Community Relations 2020).

<sup>4</sup> SPARCC is an initiative of Enterprise Community Partners, the Low Income Investment Fund, and the Natural Resources Defense Council, with funding support from the Ford Foundation, The JPB Foundation, The Kresge Foundation, the Robert Wood Johnson Foundation, and The California Endowment; see <https://www.sparcchub.org/about/>.



In Phoenix, Arizona, staff and consultants collected data through multiple methods to engage in public community conversations around proposed transit-oriented development. Six meetings were held at four locations garnering attendance of about 400 people. Concerned that community meetings were not capturing all voices, especially those in affected neighborhoods, staff were deployed at neighborhood transit stations to answer questions about the proposal. In addition to the tally of participants, Phoenix also reported on the number of questions that were asked and answered at the stations (over 455) and at meetings or through the project website (approximately 400) to measure engagement.

Among the case studies, Invest Atlanta's community engagement work invited over 20,000 individuals out of which 200 attended an outreach event or were interviewed. Demographic and geographic information were not tallied for participants, but focus groups and town halls strived for representation from small businesses, community organizations and residents from across the city, especially the south and west sides.

Fresno "intentionally cast a wider net for participants" throughout its process. The DRIVE steering committee involved 300 participants, including leaders from civic, workforce development, community development finance, minority business, educational, and community-based organizations. It held resident focus groups in different neighborhoods and across racial and ethnic groups to reflect on and refine proposed investment plans. In addition, focus groups for workers at risk of automation, specifically those in retail, food service, agriculture, warehouse and administrative roles, were conducted to understand workers' actual experiences in specific industries and occupations (McDonald et al. 2020). DRIVE's Race Equity Advisory Committee will continue to guide ongoing community engagement related to its initiatives, and a draft version of DRIVE's race equity monitoring and evaluation plan includes engagement indicators, such as the number of community meetings and events involving black and brown communities in Fresno (Fraser 2020).

## PROGRAM METRICS

Indicators that measure program outputs and outcomes are at the heart of efforts to determine if economic development practices are responsive to community priorities. Outputs emphasize program activities, and outcomes describe the changes to people, business, and/or place because of the program; at times, impact indicators are utilized to represent longer-term results.

Program metrics abound across the case studies and in the communities and projects included in this research. In fact, they can be overwhelming. Invest Atlanta's Mobility Plan has 13 indicators associated with its five objectives, several with subcomponents that must be measured. Fresno DRIVE has 18 investment plans



each with its own goals plus five overarching outcomes related to new jobs, housing units, workers trained, residents impacted and involved, and small businesses supported. There are also 17 DRIVE Race Equity Indicators, many with several levels of disaggregation. Upper Cumberland has proposed 8 output and 8 outcome indicators.

A key task of the Prosper Portland IBRN was the development of shared metrics and use of a shared reporting platform. The platform and metrics have helped provider organizations move from a competitive mindset to a more collaborative and customer-centric approach because there is more transparency among providers. Portland's IBRN network reports four impact metrics (number of businesses by gross sales, number of profitable businesses, jobs retained, and jobs created) plus four badges to indicate progress made by business owners, representing strength and stability, growth, and scale and launch with each broken down by demographic category. The reporting system was designed in collaboration with the network members and the program iterates based on feedback loops and outcome-driven data (Prosper Portland 2018).

Public or Community Benefit Agreements are another platform that integrates metrics and allows for evaluation. Prosper Portland's participants in the revised Enterprise Zone tax abatement program enter into Public Benefit Agreements (PBAs) that include elements consistent with inclusive place-based development, such as minimum standards for compensation, career ladder programming, procurement of goods and services from local businesses – including businesses owned by people of color and located in low income communities – contribution to the Workforce Training and Business Development Fund (WTBDF) and Employee Support Fund (ESF), compliance with Prosper's workforce and contracting equity in construction, City cost of service fees, and equity actions. Depending on the size of the project, two to six additional public benefits are negotiated from a menu of options in the areas of jobs, partnerships, neighborhoods, prosperity, and equity.



Community engagement in the creation of Portland's public benefits list included outreach to organizations representing schools, CBOs, and businesses to learn about their needs and what they would consider to be helpful. The initial list of ideas was then narrowed and vetted. An annual performance review is required and corrective measures are defined; however, reports are not yet completed due to the timing of the program (the first agreements were signed in 2018, with the first tax liability due in 2019). Staff are

currently compiling results, including how companies are adapting in the face of COVID-19.

The Minneapolis Equitable Engagement Fund evaluates grantee applications by whether people affected by a proposed project are involved in development and decision-making, whether there will be long-term benefits to the neighborhood, benefits to low- and moderate-income people, and partnership with neighborhood or community-based organizations, among other criteria (City of Minneapolis Neighborhood & Community Relations 2020). Invest Atlanta conducted a detailed data analysis to identify areas where there were gaps in city service delivery to disadvantaged populations. The data mining effort drove program changes that identified two specific neighborhoods that had historically received very low levels of municipal investment — Trumbull Village and the Kirtland community — which then received \$4.5 million and \$3 million, respectively, for infrastructure upgrades (Pressgrove 2019; City of Albuquerque 2019).

These program metrics represent progress over the standard job counts and investment tallies that characterize much economic development program reporting by providing greater insight into the quality of the activity. For example, Invest Atlanta’s job creation metrics include wage, benefit, and career opportunity details. The small business indicators address the type of small business assisted (aiming for 50% with 1-9 employees and 70% minority and women-owned businesses) and financial stability as an outcome (City of Atlanta 2020). Fresno DRIVE’s current discussion of metrics includes “residents positively impacted and involved” as one of its five major outcomes, and the Race Equity Indicators address capacity-building, training, and funding for community organizations. Upper Cumberland’s indicators are based on measures of individual success in proceeding through recovery treatment and obtaining stable housing and employment. The metrics also strive to make sure incentives generate benefits for current residents, as with Portland’s Community Benefit Agreement requirements and Invest Atlanta’s integration of new criteria into its incentive scorecard.

Neighborhoods aren’t viewed as merely a collection of real estate assets that investors can leverage but as sources of meaning and opportunity for residents. Fresno will focus on wealth creation in communities of color and build civic infrastructure in neighborhoods (Central Valley Community Foundation 2019). Portland emphasizes healthy, complete neighborhoods, with outputs measured by implementation of comprehensive community development plans, redevelopment projects, and public benefits agreements and outcomes measured by the percent of households living in neighborhoods with safe and convenient access to goods and services (Portland Development Commission 2015).





## COMMUNITY AND ECONOMIC INDICATORS

Program metrics are necessary but on their own may fall short of addressing the issues that motivated community engagement and prompted economic development responses in the first place. To take one example, Invest Atlanta has taken a promising step toward aligning the city's financial and incentive tools with community priorities by deploying a new incentives scorecard, but additional indicators that encompass all Mobility Plan partners could help assess progress toward priorities such as economic mobility and racial equity and should accompany the more narrowly focused program metrics.

It is a good practice to use both program metrics and economic indicators, but to present them separately (Center for Regional Economic Competitiveness 2017). Portland's reporting has been criticized by the City Budget Office and Community Budget Committee for combining program and economic indicators. In response the city is revisiting the performance measures reported in its Strategic Plan. The city of Atlanta has planned to present program metrics and socioeconomic indicators separately. In addition to the KPIs for Invest Atlanta program activity, a separate online map of 30 economic mobility indicators by neighborhood will be maintained (City of Atlanta 2020, 54). The maps include people-based, place-based, economic, education, and COVID-19 recovery metrics as well as an overall economic mobility index. People-focused indicators like household income, unemployment, home ownership, percentage of housing cost burdened families can be compared by neighborhood.

Fresno intends to continue to track racial equity indicators that were influential in catalyzing the DRIVE initiative in the first place. Much of this data will continue to come from official statistics, and the community would be a partner in validating them since the U.S. Census and other similar sources lack reliable small area data measuring these nuances. Thus, the goal is to create a data collection capacity within local community groups.

## DATA COLLECTION PITFALLS

Data availability has the potential to be the weak link in the effort to connect economic development practices to community priorities. Data definition, collection, and management protocols appear to be poorly specified for some of the proposed people-, place- and business-based metrics.

Performance metrics associated with incentive programs may actually be the closest thing to a best practice. One of Invest Atlanta's priority actions under the Mobility Plan is to 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 offer additional incentives for projects in the Southside and Westside, and encourage



investments in career advancement training and/or company-supported childcare. The KPI associated with the jobs objective is to attract/support businesses that create/retain 6,000 direct, good jobs (salary of \$40,000 - \$80,000 with employer-sponsored health insurance) or promising jobs (entry-level jobs from which most workers can reach a good job within 10 years), drawing on a Brookings analysis that defines good and promising jobs by industry and occupation (Shearer and Shah 2018).

Invest Atlanta will create the scoring matrix, collect data for the matrix from incentive applicants, and create contracts with compliance criteria. Because it controls this process, the organization should have access to the data it needs to report on this KPI. The data from companies may not be perfect and applicants may not provide every data item for every project but at least the process is feasible. The scorecard and KPI data elements are also fairly well defined. The same would be true for Portland's Public Benefits Agreements for Enterprise Zone tax abatement recipients.

Collecting data for other Invest Atlanta KPIs may prove more difficult. One of the small business KPIs is to support 225 small businesses to become financially stable, defined as showing signs of financial health (revenue and profit margins are growing, expenses are staying flat, business has enough cash in the bank to meet an unexpected expense, and business has both new and repeat customers). It is unclear if Invest Atlanta will be able to collect and track these figures for the small businesses it assists, if the companies will be willing to share this level of financial information, and how much can or should be reported publicly in the interest of transparency and accountability.

The data collection challenge is apparent in some of Portland's status updates. Portland recently reported admirably on 13 of 18 measures of success associated with the 2015-20 Portland Development Commission Strategic Plan, but the 2020 Status Report dropped two measures because the data source was discontinued, two others because there was no identified source (business owner diversity and profitable/thriving local businesses), and one measure remains marked TBD (customer satisfaction with Prosper Portland) (Prosper Portland 2019a). The agency is in the process of revisiting its performance metrics along with an update to its strategy.

Fresno may also encounter this challenge. The Fresno DRIVE monitoring and evaluation consultant has suggested a preliminary list of indicators associated with each of the key outcomes of DRIVE's theory of change. The list provides a definition, a unit of measurement, a level of disaggregation, a data source, a method of data collection, a frequency of data collection, and the responsible entity. This is an impressive start, but the data sources are vague ("state and county reports/records, administrative records and DRIVE stakeholder lead"). It may prove difficult to obtain data on some of the indicators, such as government and non-government policy changes, adjustments to promote racial equity, or the number of community meetings and events involving black and brown communities in Fresno (disaggregated by racial and ethnic group, geography, initiative, measure of level of community



participation). Since many of the data sources are “administrative records” and the plan is still in draft form, it remains unclear who or which organization will be responsible for collecting, organizing, and reporting the data for these indicators.

Upper Cumberland will almost certainly face the same problem. It will likely be able to draw on its own activities or that of its network to report on some outputs, such as clients enrolled in programs who are then placed into a job or training. UCHRA is also planning to implement a new software system to enable it to track clients served across programs and over time, so it should be able to report on individuals completing a two-year program and meeting recovery metrics related to sobriety, employment, stable housing, and stable family and social relationships, but some of these personal indicators may be difficult to measure and track. UCHRA will also need to specify how it intends to measure proposed outcomes related to community and individual respect for those in recovery.

Other cities offer examples of data challenges that accompany the benefits of drilling down into the numbers to expose inequities (Dilday 2020). Austin, Texas’s pilot of its equity assessment tool indicated that few departments had disaggregated data on contractors, clients, and community engagement participants, and thus, these departments were unable to say who they are serving and where the gaps in service exist (Oaks 2018). The Minneapolis Office of Neighborhood and Community Relations collects data for and manages the dashboard for the Blueprint for Equitable Engagement, but many of the data points still reflect 2018 figures, so it is not clear if it is being updated (City of Minneapolis Neighborhood and Community Relations 2018). The lack of sources for several metrics, such as the diversity of neighborhood association board members and community participants in citywide initiatives, calls into question the validity and utility of the data.

## MEANINGFUL REPORTING

Public reporting on activities and outcomes provides transparency and accountability to the community. Substantial effort can go into maintaining dashboards, measuring KPIs, preparing reports, and providing updates on progress toward strategic objectives. However, the review of current and proposed indicators and reporting plans suggests these efforts may still be found wanting. It is not clear that the metrics and data will tell the community what it wants to know about progress toward its priorities.

Many proposed metrics may be good measures of program or organizational performance but they may not be meaningful to community members. Program metrics tend to be defined narrowly to capture the connection between organizational action and result, but they don’t reflect multifaceted community concerns and priorities. On the other extreme, community indicators that more accurately reflect economic and social experiences are too comprehensive. While they offer insight into socioeconomic conditions, they are not helpful in identifying mechanisms for change because they are determined by multiple factors beyond the control of EDOs. The case studies suggest a need for a new set of in-between indicators that are “just right” to provide meaningful accountability for economic development efforts. The pathway to determining what that set of “just right” metrics might look like is not clear, yet a few options suggest themselves.

One option is to monitor Fresno DRIVE’s work to involve the community in the data collection and reporting process. Resident input on which program indicators they care about and ability to comment on the validity or nuances of neighborhood socioeconomic indicators should provide new insights into metrics of merit for responsive reporting. Portland’s IBRN network also provides a promising example of metrics created, collected, and maintained by the group for the group, ensuring that the indicators help keep programs and progress on track to help the clients.



A second option is to select KPIs or program metrics to inform activities, not judge performance. While Invest Atlanta's KPI's are laudable in striving to hold the organization accountable, stakeholders expressed concern that the KPIs are not sufficient to measure progress toward the community's broader priorities, which transcend the Invest Atlanta toolkit. A complementary strategy could be to create additional impact indicators consistent with the mobility plan's priorities against which progress by Invest Atlanta, the City of Atlanta, and their partners is measured and reported to guide future efforts.

A third option is doing what annual reports have always done: tell stories that add color and nuance to the KPIs and community indicators. There is a reason ribbon cuttings are popular in economic and community development. They provide a focal point for economic development activities that are otherwise abstract. Similarly, thoughtful and effective storytelling can be a useful addition to formal metrics by providing relatable, tangible examples that connect programs and policies to community priorities.





# FINAL REFLECTIONS

*Governments and communities can work together effectively to ensure that a community's goals and priorities are reflected in economic development work by conducting equitable and inclusive engagement practices.*

## **DETERMINE**

Equitable engagement practices acknowledge a shared history and often coalesce around data-driven findings that establish a common understanding of today's challenges. They move engagement from a process to inform residents to a forum for listening, learning, partnering, and empowering the community to be part of the decision-making process. Both residents and organizations tend to expand their circles slowly, incrementally engaging with more voices as trust and respect are built. Sustaining trust and respect requires that people's time, expertise, and contributions are valued (and compensated financially) and appropriate resources are devoted to program design and implementation as well as initial rounds of engagement.

## **DESIGN**

Economic development programs and policies that are developed in response to community priorities are often more people-centric and place conscious and expand business and economic initiatives to reach more small, neighborhood businesses. Residents also tend to offer a more holistic view of what can make their communities better, rather than a narrow programmatic approach that might be aligned with individual government agencies or departments. Responsive programs and policies, therefore, must also take a broad view and not rely exclusively on narrow work plans to achieve community priorities. Partnerships that engage civic societies and public and private sector entities across the community are usually necessary to make desired progress.

## **EVALUATE**

Metrics, key performance indicators, dashboards, and annual reports to provide transparency and accountability are common elements of equitable engagement processes. Skepticism of glossy reports that "sell" results has led to more serious attempts to measure and report on outcomes achieved on behalf of the community. These efforts are to be commended, but a scan of proposed measurement and evaluation structures suggests that much data will be collected and disseminated, but many communities will still struggle to provide high-quality, valuable reporting that will truly inform residents about how communities are changing in line with their priorities.

# APPENDIX A

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## LOCATIONS TAKING AN EQUITABLE AND INCLUSIVE APPROACH TO ECONOMIC DEVELOPMENT

Over the past few years, the number of city and county economic development departments adopting an equitable and inclusive frame to economic development has grown. These economic development strategies may focus on specific neighborhoods or be for the entire municipality with place-based elements. The strategies recognize the importance of incorporating more inclusive and equitable forms of community engagement and attempt to be more inclusive than normal. This list of communities is not comprehensive but suggests that EDOs recognize that equitable economic development may be a solution to economic growth that advances equity and/or reduces disparities in outcomes.

### CASE STUDIES

- **Invest Atlanta**  
One Atlanta: Economic Mobility, Recovery & Resiliency Plan
- **Prosper Portland**
- **Fresno DRIVE**  
(Developing the Region's Inclusive and Vibrant Economy)
- **Upper Cumberland, TN**  
Recovery-to-Work Initiative

### EQUITABLE ECONOMIC DEVELOPMENT COHORT CITIES

- Boston
- Charlotte
- Houston
- Memphis
- Milwaukee
- Minneapolis
- Austin
- Baltimore
- Louisville
- Nashville
- Phoenix
- Sacramento
- New Orleans
- Birmingham
- St. Louis
- Stockton

### PLACE-BASED ENGAGEMENT PROCESS RESEARCH

- Phoenix - TOD South Central Light Rail extension
- Nashville - Wedgewood-Houston neighborhood
- Albuquerque - Rail Yards and procurement
- Memphis comprehensive plan
- Minneapolis comprehensive, race and equity strategy, and neighborhood engagement plans
- Baltimore - Park Heights neighborhood
- Louisville - Vision Russell
- Austin incentive agreements
- Houston - East End district
- Boston Resident Jobs Policy and Economic Development Center



## ADDITIONAL EQUITABLE ECONOMIC DEVELOPMENT EFFORTS

- Long Beach “Everyone In Economic Inclusion Implementation Plan” (Everyone In, LISC Los Angeles, and Councilmember Rex Richardson 2019; Keisler 2020)
- A Better Bakersfield and Boundless Kern: Regional Action for Economic Prosperity (B3K Prosperity Project) is a regional community and economic development strategy among regional partners including the Greater Bakersfield Chamber, Kern Community Foundation, County of Kern, the Kern, Inyo, Mono (KIM) Workforce Development Board (WDB), City of Bakersfield and the State of California. (“A Common Agenda for Enduring Regional Prosperity” 2020; Boyle 2020)
- Building Shared Prosperity in Stanislaus lead by Stanislaus Community Foundation (Stanislaus Community Foundation 2020)
- Michigan Economic Development Corporation strategic plan and return on investment calculations
- Minneapolis [Strategic and Racial Equity Action Plan](#) (SREAP) identifies a set of operational and policy priorities, and the Community Planning and Economic Development’s priorities are to support inclusive economic development through increasing the number of Minneapolis based businesses owned by Black, Indigenous, and People of Color (City of Minneapolis 2020).
- Minneapolis [Neighborhoods 2020 Program](#) centers on building equity and aligns with the City’s Strategic Racial Equity Plan and the Minneapolis 2040 Comprehensive Plan to ensure an equitable civic participation system that enfranchises everyone and builds people’s long-term capacity to organize and improve their lives and neighborhoods (City of Minneapolis Neighborhood & Community Relations 2020).
- Durham, North Carolina’s Strategic Plan, includes [Shared Economic Prosperity](#) and a resulting [Equitable Community Engagement Blueprint](#) (City of Durham 2019; Neighborhood Improvement Services, City of Durham 2018).
- [Houston Complete Communities Initiative](#) (City of Houston 2020)
- Franklin County, Ohio - [Economic Development Strategic Plan](#)
- [Indianapolis Inclusive Growth and Incentives](#)
- [Detroit Future City](#)
- King County, WA - [Equity Impact Tools](#)
- Sacramento [Inclusive Economic Development Strategy and Action Plan](#) (City of Sacramento Office of Innovation and Economic Development 2019)



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