2020 VISION

An Equitable Economic Development Framework for St. Louis

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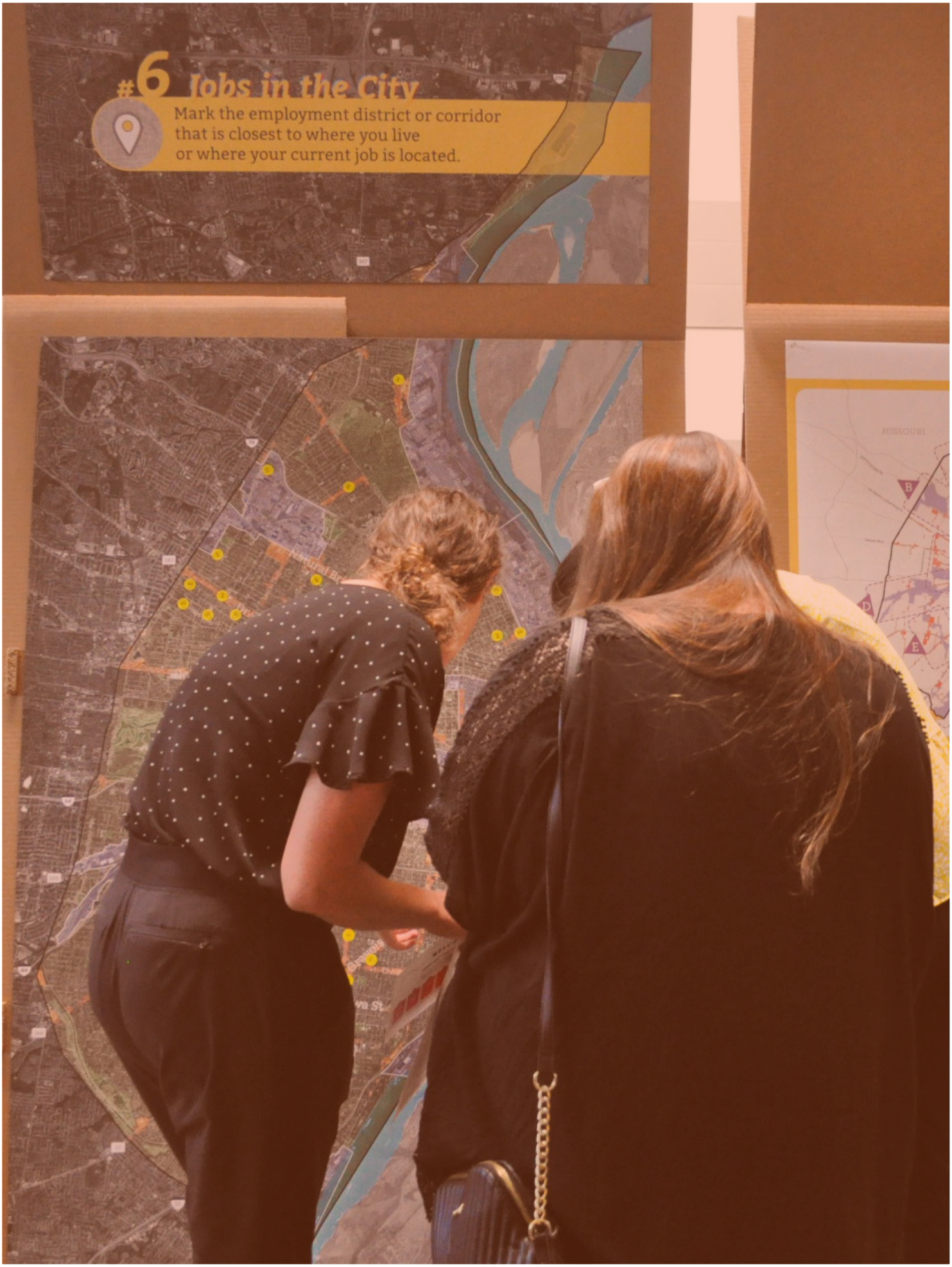
This plan reflects the collective work of many people who deeply care about St. Louis and its every neighborhood. In one-on-one conversations, roundtable discussions, community meetings, and public open houses, hundreds of people gave their commitment, energy, and ideas to the development of this framework.

The plan would not have been possible without them.


#6 Jobs in the City
Mark the employment district or corridor
that is closest to where you live
or where your current job is located.
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0

EXECUTIVE SUMMARY

INTRODUCTION

Overview

The last decade has provided many reasons for celebration and optimism in the City of St. Louis. Since 2010, St. Louis has grown its jobs base every year. According to the most recent complete annual data, city employment growth was faster than national growth for only the second time since the Great Recession.[1] In addition to these economic measures, there are other visible signs of success: Downtown has added 5,000 residents; NGA is building a new 100-acre campus in North City; Square, the San Francisco-based mobile payment platform developed by two St. Louis natives, is building offices in the former Post-Dispatch building and is expected to anchor the "North of Washington" innovation corridor; Cortex continues to add significant new physical developments, including a $115 million building at 4210 Duncan Ave.; the Arch Grounds received $380 million worth of enhancements; Union Station is now home to the St. Louis Aquarium and the Wheel, a 200-foot-tall Ferris wheel; the Brickline Greenway will link 17 neighborhoods across the city; and MLS has awarded St. Louis a franchise, which will begin play in 2022 in a new stadium in Downtown West.[2 3 4 5 6]

In addition to these high-profile developments, neighborhoods across the city have experienced transformations -- 16 out of the city's 79 neighborhoods gained population from 2000 to 2010, according to nextSTL.[7] New tools to support neighborhood investment (e.g., Choice Neighborhoods), local organizational capacity (e.g., CDCs, neighborhood organizations, and faith-based groups, among many others) and data capacity (e.g., Vacancy Collaborative) support these revitalizations. The city's neighborhoods are one of its strongest assets and provide the city with one of its biggest competitive advantages.

Despite this litany of accomplishments and seemingly bright outlook, other measures – high job density but low job growth, and profound inequities in access to opportunity and prevalence of poverty among residents – paint a bleaker picture. Yet, there is strong reason to believe that the battle to contend in a global economy and the fight for economic equity are not two separate struggles, but one. Addressing the single challenge of equitable urban economic growth requires the commitment and capacities of a broad set of public, private, philanthropic, university, and community stakeholders employing a range of tools to address foundational issues of place, prosperity, and people.

At the request of the Board of Aldermen, the St. Louis Development Corporation (SLDC) – the economic development agency for the City of St. Louis – commissioned this Equitable Economic Development Strategic Framework. The framework is intended to link other related economic development plans, thereby creating a unified approach to equitable economic growth in the city: "The purpose of [this framework] is to position the city on a path toward a resilient economy by casting the vision that SLDC, the city and its public, private and institutional partners can coalesce around and act upon to drive investment and growth in the city." As the framework's advisory committee emphasized from the start of the process, race, place, poverty, and opportunity have to be the core concepts around which to understand the city's economic trajectory and the basis on which a framework for a more equitable, more vibrant, and more resilient economic future must be built.

Ultimately, this framework seeks to position St. Louis to compete regionally and globally in its key economic clusters, catalyze the transformation and growth of St. Louis' neighborhoods through a commitment to "quality of place" throughout the city, capitalize on core economic strengths to unlock the opportunity for all to thrive, and maintain a more sustainable tax base driven by commercial and residential investment and renewed population growth.

"If the [framework] is utilized properly, it can be a process for coordination and unity across the City and can help serve as a bridge to break through decades of divisions to bring groups together… with a centralized focus."

1 QCEW-UDP; Mass Economics analysis

2 Project interviews and roundtables

3 Developer plans $115M Cortex building. (2019, June 17). St. Louis Business Journal. https://www.bizjournals.com/stlouis/news/2019/06/17/developer-plans-115m-cortex-building.html

4 Stoss Unveils New Chouteau Greenway Plan for St. Louis. (2020, January 20). ArchDaily. https://www.archdaily.com/931927/stoss-unveils-new-chouteau-greenway-plan-for-st-louis

5 Garth, G. (2018, June 29). Gateway Arch: An American classic gets a major overhaul. USA Today. https://www.usatoday.com/story/travel/destinations/2018/06/29/gateway-arch-national-park-st-louis/744274002/

6 Johnson, G. (2019, February 11). St. Louis Wheel Approved for Union Station. NextSTL. https://nextstl.com/2019/02/st-louis-wheel-approved-for-union-station/

7 Understanding Population Change and Density in St. Louis (UIC & nextSTL @ PXSTL). (2014, September 17). NextSTL. https://nextstl.com/2014/09/pxstl/

GUIDING PROPOSITIONS

As the Advisory Committee emphasized from the outset, race, place, poverty and opportunity must be the core concepts for understanding the city's economic trajectory – and they must form the foundation for a framework that lays out a more equitable, vibrant, and resilient economic future. Throughout this process, a wide range of demographic and economic variables (see Ch. 2: Economic and Demographic Report) were evaluated to inform the creation of the following 12 Guiding Propositions (see Figure ES-1):

Figure ES-1. Guiding propositions

Broad-based cluster growth:

The city must continue to grow jobs in its traditionally strong clusters, many of which are also regional strengths, as well as support clusters that leverage the city's specific asset base.

Entry-level and middle-wage job focus:

City-specific clusters should have a focus on creating entry-level and middle-wage jobs.

Workforce:

Workforce and educational programs must be better aligned and responsive to the needs of both businesses in growing sectors and job seekers.

Place-based employment and development across the City:

The geography of inclusive business and job growth must build upon the needs, assets, and opportunities, and where necessary, also support adjacent community development.

Diverse entrepreneurship and entrepreneurship opportunities:

The city's strong entrepreneurial ecosystem must continue to evolve to support new priorities: business models for neighborhood retail and amenities and vibrant businesses with diverse ownership.

Economic opportunities for all:

Increased access to jobs, higher wages, real estate ownership and appreciation, and business ownership must be a priority for the city's underinvested neighborhoods and its residents, which have been chronically disconnected from economic opportunities.

Population retention and growth:

In addition to growing the number and quality of jobs, St. Louis must increase its residential population by retaining existing residents, re-growing the black middle class in the city, and retaining and attracting talent from across the globe.

Diverse and distributed leadership:

New models of distributed leadership must be representative of the population of St. Louis, with outreach and focus on the diverse voices of leadership across race, gender, geography and generation.

Public sector capacity:

Implementing an equitable economic development framework will require adequate funding for key public sector functions related to planning, real estate development, infrastructure, and business support.

Investment and capacity alignment across sectors:

Public, private and philanthropic investments must be aligned around key strategies and places within the city. Investments must include a mix of signature projects and longer-term capacity building.

City fiscal health and investment:

Advancing equitable economic growth in St. Louis must contribute to improving the city's fiscal health by increasing the tax base in ways that are equitable and growth-sustaining.

The story of the City of St. Louis:

Advancing equitable economic growth in St. Louis begins with a clear understanding of the value of the city's human capital, innovation, education, technology, and entertainment assets and their existing and potential contribution to the city, regional, and state economies.

GOALS OF THE ECONOMIC DEVELOPMENT STRATEGIC FRAMEWORK:

As the city embarks on a journey toward a more prosperous and equitable future, progress must be tracked and measured using economic, place-based, and population-based indicators. Taking into account advisory committee input and community outreach, ten specific and measurable goals were developed in support of these objectives:

1. Achieve annual growth in employment and payroll among key industry clusters that meets or exceeds their national growth rates.
2. Reduce St. Louisan's poverty rates – across all racial/ethnic groups – to below their respective national rates; increase median household incomes – across all racial/ethnic groups – above the U.S. (adjusted for cost of living differential).
3. Close the unemployment and wage gap between Black/African Americans and their white counterparts, as well as other disadvantaged racial/ethnic groups.
4. Increase the availability of middle-wage opportunities in the city's job base.
5. Attain enough employer commitments to adopt workplace policies that: diversify the workforce, increase worker retention, and provide access to wrap-around services so that at least half of all job holders in the city work for employers that have committed to such policies.
6. Reduce vacancy rates and promote vibrancy on commercial corridors, especially in underserved neighborhoods.
7. Promote anti-displacement by increasing home and business ownership opportunities for people of color and other under-represented populations.
8. Slow, then reverse, population decline – particularly among Black/African American residents and households with school-aged children
9. Increase the quality and capacity of neighborhood organizations, CDCs, and business associations to represent and respond to resident and other local stakeholder interests.
10. Strengthen the city's fiscal outlook by responding to post-COVID industry and workplace trends, increasing revenues (overall and per capita), maximizing the efficiency of incentive use and expenditures by promoting job and housing density, and building a budget surplus.

Specific metrics to track each of these goals are presented in Chapter 6.

THE RELATIONSHIP OF THIS FRAMEWORK TO OTHER PLANNING EFFORTS

Over the eighteen months in which this framework was developed, other strategic and planning efforts in the city were also underway, including for Chouteau (now Brickline) Greenway, Cortex, Downtown, the region, and for the geospatial economic cluster, both around the NGA West site and in the broader region. This framework was developed in coordination with those efforts and is intended as a complementary effort that leaves the strategic imperatives for those specific areas to the individual planning initiatives. At the same time, this report is intended to provide a unifying framework to shape existing and future planning and strategic efforts for the City of St. Louis.

Research has established the importance of neighborhood characteristics in shaping economic outcomes of residents (Chetty et al., 2016; Chetty and Hendren, 2018).[8] Although the framework presented in this report is not meant as a set of neighborhood plans, it should be complementary to civic and public sector efforts to improve quality of life and opportunity in the city's neighborhoods. These efforts, in fact, abound in St. Louis and will be augmented in coming years by neighborhood planning efforts from the City's Planning and Urban Design Agency. These plans will cover a standard set of topics related to neighborhood characteristics including land use and zoning, housing, sustainability, economic development, safety, and equity, as well as secondary and focus areas of most relevance to the specific neighborhood.[9]

The strategies reflect the needs and opportunities of specific places or in the case of the regional efforts, opportunities to accelerate growth across the region with collaboration and improved planning. In the case of this citywide framework, this is realized as a strategy for broad-based opportunity that aligns specific sets of assets – density of jobs, population, amenities, and higher education institutions to grow existing clusters in the central corridor, as well as investments in industrial parks, transportation assets (rail and intermodal facilities, the river, major highways), and business supports and workforce providers to promote growth in manufacturing and distribution across the city. One of the most critical assets in the city today is its neighborhoods, home to vibrant communities that must be at the forefront of any planning and growth efforts.

Other city and regional plans must prioritize inclusive job creation, hiring and retention practices, and entrepreneurship that explicitly works to close racial gaps in employment, business ownership, and wealth. This focus has become even more of an imperative with the economic costs of COVID. These costs have fallen disproportionately on Black/African American and Latinx workers and business owners, who are enduring much higher unemployment rates,[10] are more likely to own firms in industries disproportionately harmed by COVID, and have had significantly less support from initiatives like the Payroll Protection Program.[11] In neighborhood planning, as in this framework, the focus on racial equity must also inform strategies for housing, commercial corridor development, and creation of household and community assets. While the strategies in this framework are still important and relevant for addressing fundamental challenges facing the city, the COVID-19 pandemic may expedite timelines for some strategies and warrant additional crisis response.

In that spirit, economic development efforts must look for and advance opportunities to collaborate across geographies and governmental units where it makes sense. This can be at the scale of neighborhoods or employment districts with, for example, greater collaboration between creative firms located in Downtown and Midtown; between urban nodes and broader regional strategies, such as in creation of a software tech node in the city that coordinates with other regional nodes to support the growth and evolution of emerging opportunities in agtech, cybersecurity, fintech, and geospatial; and between the City of St. Louis and the State of Missouri around, for example, establishing state funding and tools to accelerate development of land assets in North St. Louis and along the riverfront to support the processing and distribution of output from farms and ranches in Missouri, as well as the larger agricultural production region.

In developing this plan, strategies need to be rooted in the current fiscal reality. The short-term fiscal benefits of new development projects are often outweighed by the cost of offering property tax abatements (at least for the first decade) to make projects financially viable, leaving earnings taxes as the primary contributor to city revenues. This may no longer be the right model. Although the City of St. Louis contends that employees of firms located in the city who have or are working from home as a result of COVID are not entitled to a refund of their earnings taxes,[12] long-term trends post-COVID – greater desirability of non-

8 Chetty, Raj, Nathaniel Hendren, and Lawrence Katz. 2016. "The Effects of Exposure to Better Neighborhoods on Children: New Evidence from the Moving to Opportunity Project." American Economic Review 106 (4); Chetty, Raj, and Nathaniel Hendren. 2018. "The Impacts of Neighborhoods on Intergenerational Mobility I: Childhood Exposure Effects." Quarterly Journal of Economics 113 (3).

9 "Neighborhood Plans: Minimum Submittal Requirements for Adoption," Adopted by City of St. Louis Planning Commission. July 1, 2020.

10 In May 2020, Black/African Americans comprised one-fifth of the unemployed population in Missouri but in 2018 made up only 11% of the population ages 16 and older (U.S. Census Bureau American Community Survey 2018 1-year release; Missouri Department of Labor)

11 Matthews, C. (2020, April 30). Small-business loan program discriminates against women and minorities, lawsuit alleges. MarketWatch. https://www.marketwatch.com/story/small-business-loan-program-discriminates-against-women-and-minorities-lawsuit-alleges-2020-04-30

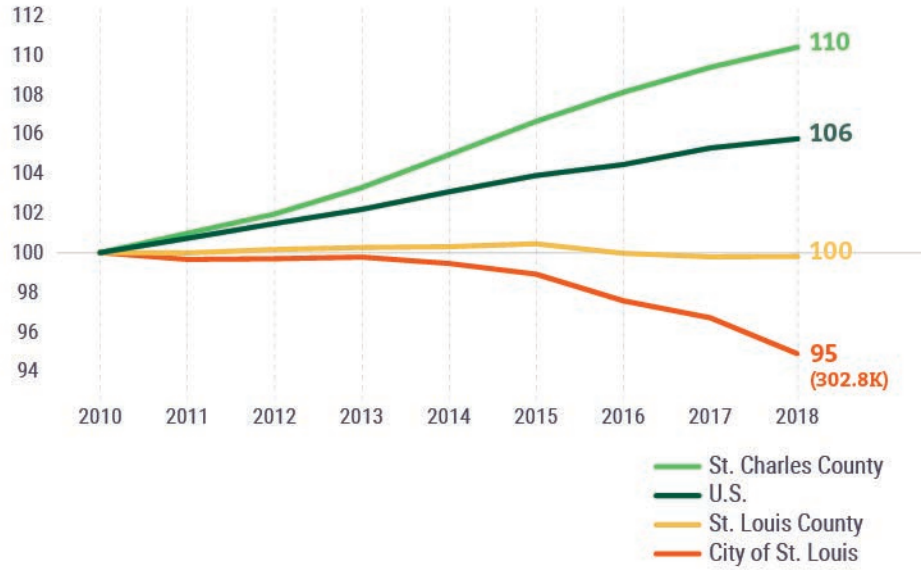
12 Schlinkmann, M. (2020, June 12). Working from home instead of in the city? Don't expect a break from paying the St. Louis earnings tax. St. Louis Post-Dispatch. https://www.stltoday.com/business/local/working-from-home-instead-of-in-the-city-don-t-expect-a-break-from-paying/article_ddc57bb7-7709-5534-8524-1c414e5f7ef4.html

OVERVIEW OF ST. LOUIS ECONOMY AND DEMOGRAPHICS

urban locations and increased adoption of work-from-home practices – could work against even nominal growth in earnings taxes, which currently account for about one-third of city revenue. However, these same pressures could actually be beneficial if they accelerate the development of local and state tools to assemble and clean land and create marketable turn-key sites that can support growth in physical economy activities like manufacturing, as well as adoption of new and evolving models of food retail and distribution. Making better use of land in the city can also help boost commercial property tax revenues, which currently account for only a small portion of city revenues.

As this report lays out in detail, the city has had and is facing challenges associated with land use, job growth, racial disparities, and fiscal conditions. These challenges unfold in a city with a national reputation in economic clusters like biotech and geospatial but also agricultural technology and distribution, creative industries, and across all types of entrepreneurship. With 3,230 jobs per square mile, the density of economic activity is 28 times that of the rest of the region (and over 60 times that of the areas outside of St. Louis County). The average wage associated with a job within city boundaries is $61.2K, more or less identical to the average for jobs in St. Louis County and about $4,000 more than the average for all U.S. jobs. Beyond these strong economic measures, the city also has a number of enviable cultural amenities: it is home to professional sports teams in baseball, hockey, and in 2022, soccer, and millions of people visit the city for events, conventions, and cultural activities. Yet, discussions about the city too often resort to framings focused exclusively on deficiencies, a habit that ultimately hurts initiatives big and small, neighborhood and regional. It is the hope that the information and structure provided in this report can be used to help shift this narrative.

Figure ES-2. Population indexed to 2010 levels



The City of St. Louis sits on 61.9 square miles along 19 miles of Mississippi River shoreline. The city's population declined over the second half of the 20th century and has continued to decline into the 21st century. (See Figure ES-2.)

The north side of the city has experienced sustained population loss (-10K) while the south side (+3.6K) and central corridor (+2.0K) grew from 2010 to 2017 (see Figures ES-3 and ES-4).[13] The city is majority non-white, and the bulk of the city's population loss has been concentrated among Black/African American residents and families with school-aged children. At the same time, the city is aging and gaining highly-educated millennials.[14]

13 These geographies are frequently used to partition the city. Although useful for understanding dynamics within the city, they are limiting in that they fail to capture most of the nuance around demographic and economic trends at a neighborhood scale.

14 U.S. Census Bureau American Community Survey 2010-2018 1-year release

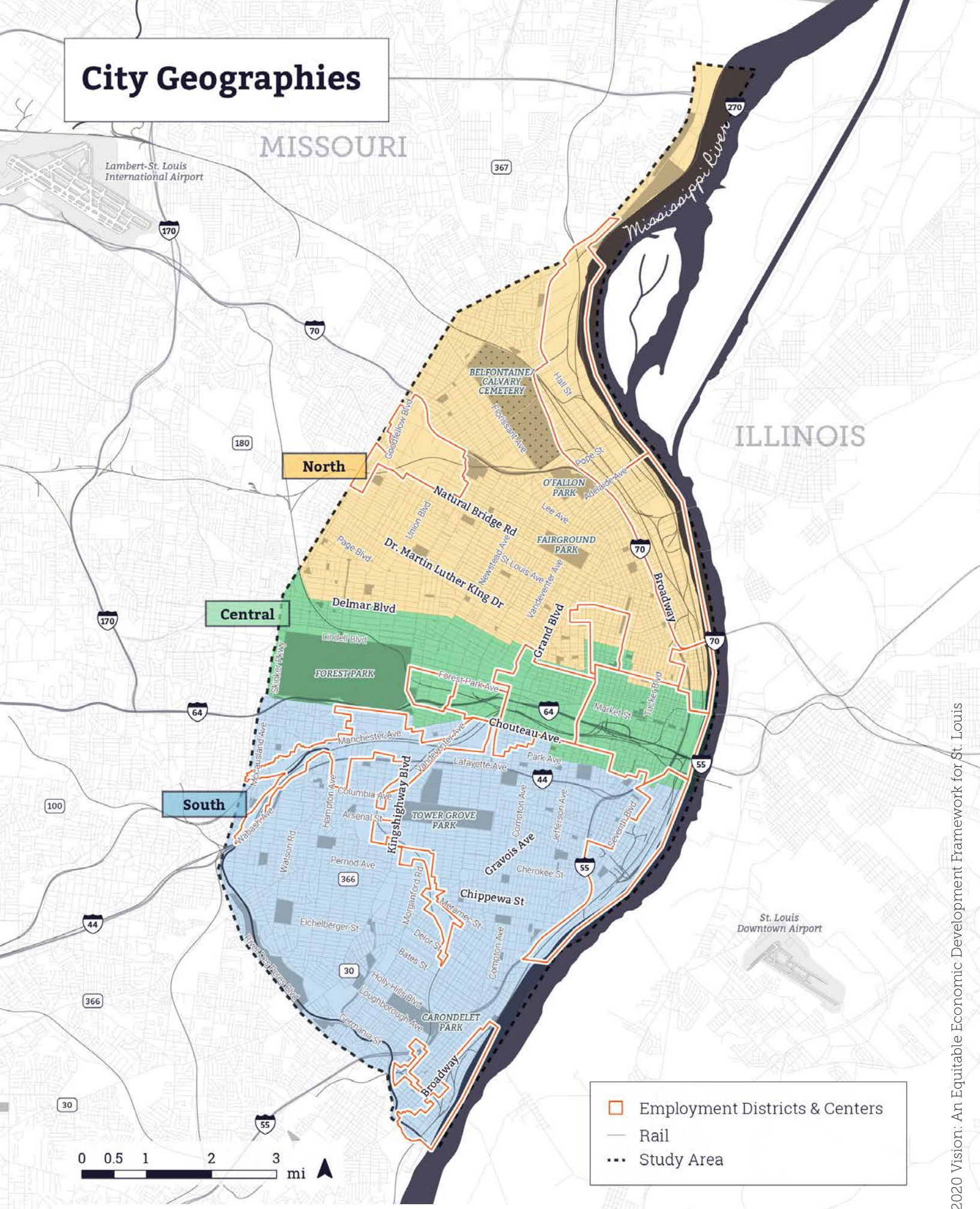


Figure ES-3. City geographies

The city is critical to regional prosperity. Although the city contains less than 1% of the land area of the St. Louis, MO-IL MSA, St. Louis accounts for 11% of the regional population, 17% of private sector jobs, and 19% of generated wages.[15] With 200K private sector jobs (and an 30K jobs in the public sector), the city boasts an enviable private sector job density – the highest among all Missouri counties – as well as high wages. The biggest industries in the City of St. Louis are Hospitals (29.4K jobs in 2018); Food Services and Drinking Places (16.7K jobs); Professional, Scientific, and Technical Services (16.7K jobs); and Educational Services (13.3K jobs).[16] Although job growth in the city lagged St. Louis County, the rest of the region, and the U.S. from 2010 to 2018, it grew faster than all three from 2017 to 2018. (See Figure ES-5.)

Figure ES-4. Population change, 2000-2017

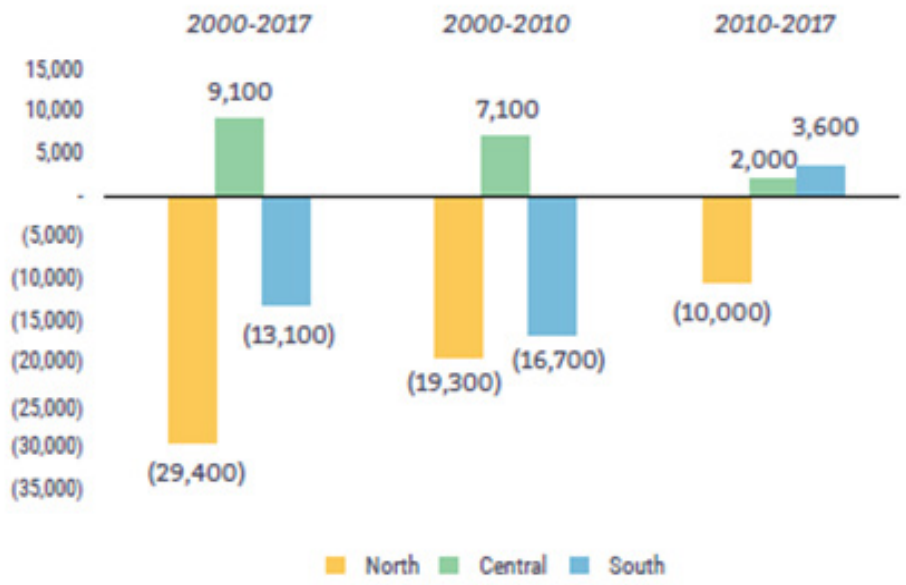
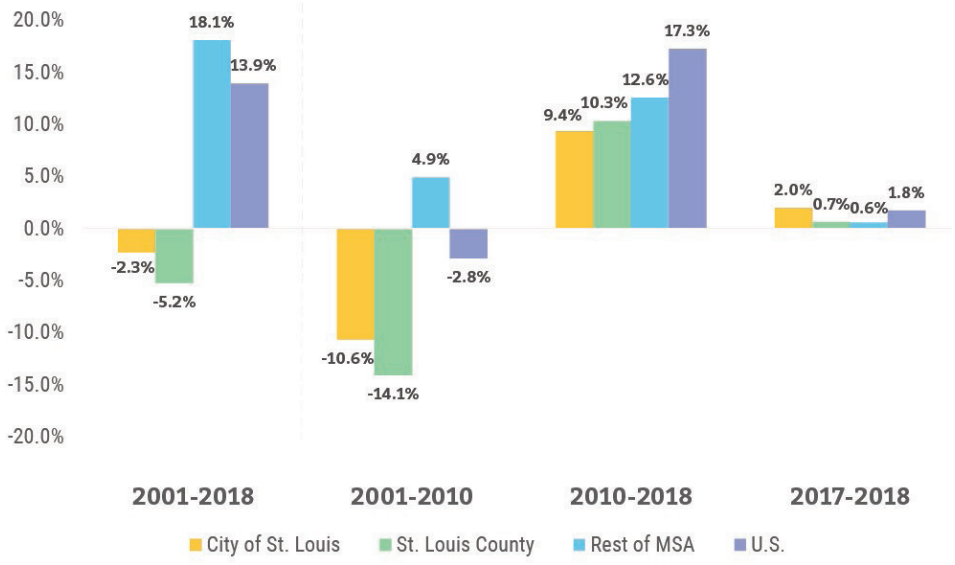


Figure ES-5. Private sector job growth, 2001-2018



15 QCEW-UDP; U.S. Census Bureau American Community Survey 2018 1-year release; Mass Economics analysis

16 QCEW-UDP

On average, city wages are higher than the rest of the region; the average city wage is $61.2K, compared to $53.1K in the rest of the region (including St. Louis County) and $57.2K nationally.[17] Job holders in the city also earn more across educational attainment levels (although workers with a bachelor's degree earn more in St. Louis County).[18] The city's economic growth has been accompanied by a shift towards industries with higher education requirements: in 2018, about 35% of the city's jobs require at least a bachelor's degree compared to under 29% nationally while in 2010, only 31% of the city's jobs required at least a bachelor's degree compared to 29% nationally.[19] Barring an intentional strategy – i.e., this framework – the city's economy will continue to produce jobs that are inaccessible to a significant portion of the city's residents.

17 QCEW

18 QWI

19 QCEW-UDP

St. Louis is also a city of great economic disparity. Although city resident incomes are growing, average household income in the city still lags the rest of the region by over $20K. The overall unemployment rate in the city is high by both regional and national standards. While white residents report lower unemployment than the region and nation, Black/African American residents and residents of other races/ethnicities experience significantly higher rates.[20] In addition, Black/African American job holders face a sizeable wage gap compared to white job holders, earning on average just 48% of what white job holders earn.[21] These disparities vary dramatically across the city: the poverty rate on the north side of the city (37%) far exceeds the poverty rate in the central corridor (23%) and south side of the city (20%). North of Delmar, almost all residents live in a census tract with at least 25% poverty, compared to around half of residents in the central corridor and less than one-third of residents south of Chouteau Ave.[22]

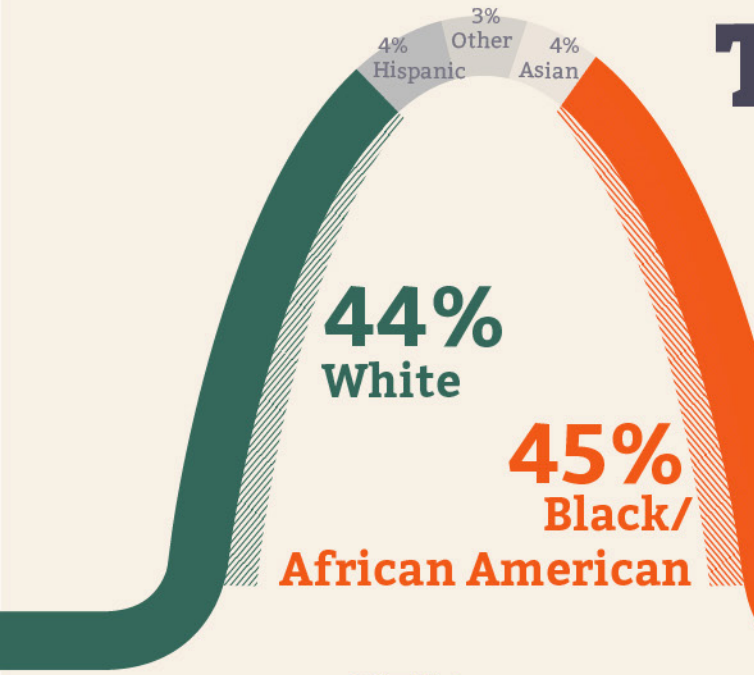
20 U.S. Census Bureau American Community Survey 2018 1-year release

21 QWI

22 U.S. Census Bureau American Community Survey 2017 5-year release

A thriving central core is important as it provides unique opportunities for businesses and employment and, like many cities across the nation, serves as a gateway for talent and creativity. But St. Louis must equally focus on opportunities across the City in areas often overlooked for new investment and growth. This work is dedicated to addressing these challenges by focusing on: business clusters that provide equitable job opportunities; in places that contain important jobs but are often inaccessible to nearby residents; and in neighborhoods where training and workforce is often a critical need.

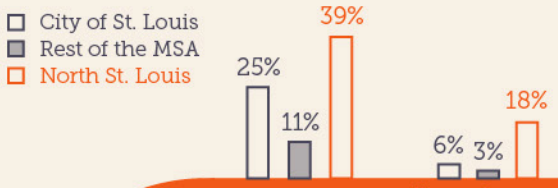
The Impact of Race



Almost half of St. Louisans are Black/African American.

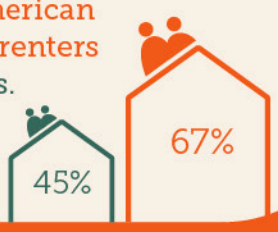
(As a comparison, 12% of the citizens in our country are Black/African Americans.)

North St. Louis has 93% Black/African American St. Louisans.



More Black/African American St. Louisans are home-renters than White St. Louisans.

(Percent of renter occupied housing units)



St. Louis ranks 18/97 among the 97 largest U.S. cities in terms of INCOME INEQUALITY.

A Black/African-American employee makes on average 48% of a white employee.

Between 2010 and 2018, the DECLINE in the City's Black/African-American population (-20,300) was the major driver of the City's total loss of 16,300 residents.

Improving **OPPORTUNITIES** for **Black/African-American St. Louisans** is **CRITICAL TO STABILIZING** the City's population and economy.

(Source: U.S. Census Bureau American Community Survey 2010, 2016 (1-year release), 2017 (5-year release), 2018 (1-year release); The Brookings Institution; QWI; Mass Economics Analysis)

Figure ES-6. The impact of race

STRATEGIES

Strategies aimed at addressing the ten goals listed above are organized around three major strategic areas:

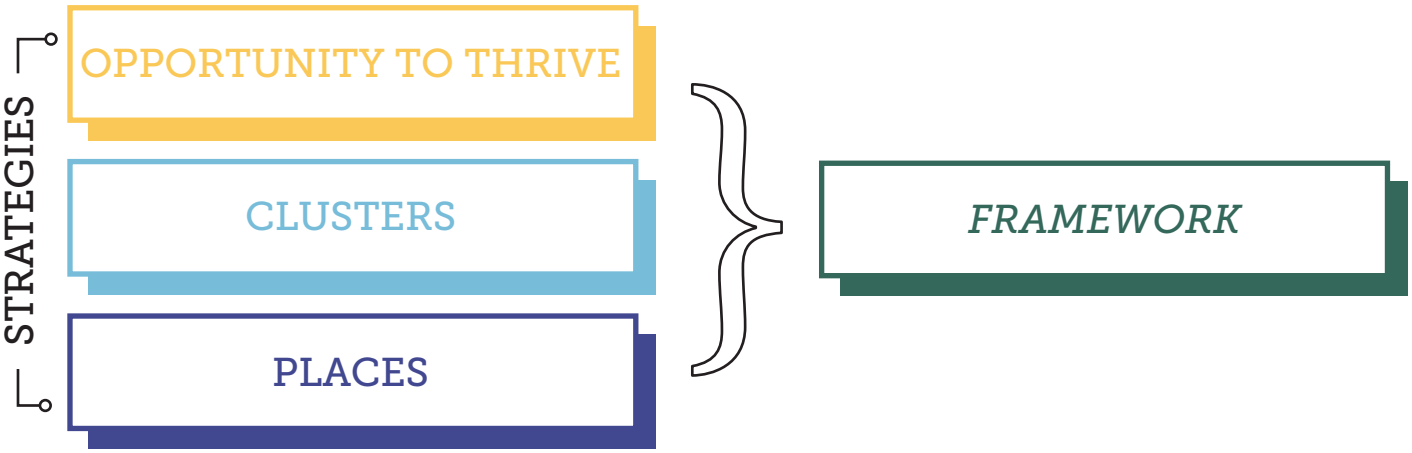
Opportunity to Thrive: Identifies the types of supports needed to translate economic growth into higher and more stable incomes and opportunities – and increased household wealth – for St. Louisans and eventually to support population growth in the city;

Clusters: Identifies the sets of industries that can provide the foundation for significant growth in jobs and entrepreneurship, with a focus on clusters that can provide quality opportunities for St. Louisans of all educational attainment levels;

Place: Recognizes that conditions and opportunities vary across the city and that a place-based approach is necessary to create a high quality of life for all residents.

These areas are used to classify the strategies but are by no means siloes – and in practice, many strategies are interconnected and cut across two or three areas. This sequence from opportunity to thrive, to clusters, to place does not imply prioritization of one section over another, but rather reflects the linkages across the strategic areas: equitable growth requires vibrant corridors and districts across the city that can support a wide range of jobs; these jobs must be accompanied by supports that increase opportunities for St. Louisans from all neighborhoods and racial groups for stable and prosperous careers; and jobs and careers must translate asset building, especially home ownership and equity, for households.

Figure ES-7. Framework strategies



Opportunity to Thrive Strategies

What follows is an overview of the proposed strategies for each section of the report. While only the high-level strategies are listed below, each strategy in the full text is accompanied by a series of action items to guide implementation. The framework is designed to be actionable and to retain and build on the city's assets and existing strengths, rather than starting anew. Its strategies are structured to provide detail on specific tactics, including roles of specific organizations (SLDC alongside other economic development organizations in the city and region), timing of implementation, potential funding, goals, and evaluation metrics. These are designed to provide SLDC staff, the city, and their partners with a playbook for implementing the strategies in each of the three strategic areas (opportunity to thrive, clusters, and place). Strategies in these areas work in tandem to make the city more attractive to current and prospective residents, workers, entrepreneurs, businesses, and leaders.

The City of St. Louis has a tremendous asset base, owing in large part to its residents, entrepreneurs, and workforce. They are integral to its identity and contribute to neighborhood vitality, character, and quality of life and require special focus and attention in this framework – and the city must ensure that they have an opportunity to thrive. The following sections lay out an approach to enable population retention and growth, support diverse entrepreneurs and entrepreneurship opportunities, and engage employers around workplace practices to support inclusive growth. The final section examines how SLDC and others can build capacity to actually measure "opportunity to thrive" across and within the city.

Population Retention and Growth

The city's population has been declining for decades, and today, the city is just over one-third of its peak. The city's population loss has been concentrated among Black/African American residents, as well as families with children. The number of Black/African American residents of the city declined by 13%, or just over 20K, from 2010 to 2018. Black/African American families with children declined by 24% from 2010 to 2018, far outpacing the decline in St. Louis County and the nation.[23] To address population loss, St. Louis must actively work to retain existing residents, grow the Black/African American middle-class, and attract newcomers from across the U.S. and globe.

- **Strategy 1:** Support homeownership opportunities and retention in targeted neighborhoods
- **Strategy 2:** Develop an anti-displacement policy in collaboration with the Vacancy Collaborative and its Anti-Displacement Working Group
- **Strategy 3:** Develop a plan to retain and grow the city's Black/African American middle-class
- **Strategy 4:** Coordinate a marketing approach for the city, tailored separately for current and prospective residents

23 U.S. Census Bureau American Community Survey 2010-2018 1-year release

Diverse Entrepreneurs and Entrepreneurship Opportunities

St. Louis is a diverse, so-called "majority-minority" city, but this is not reflected in statistics around entrepreneurship and business ownership. Despite having the highest share of Black/African American-owned firms among the 100 largest American cities – in 2017, 34% of privately-held firms with employees in St. Louis were Black/African American-owned – the city ranks near the bottom for levels of employment per firm, payroll per firm, and revenue per firm for MBEs, WBEs, and privately-held firms with employees, in general.[24] Although the city has a well-developed ecosystem for innovation and entrepreneurship, it must continue to evolve to support new priorities, including business models for neighborhood retail and amenities, a vibrant business-to-business cluster with diverse ownership, and a focus on one of the most staggering challenges facing entrepreneurs in the city, namely access to capital.

- **Strategy 1:** Re-conceptualize SLDC's diversity programming beyond certification and enforcing MWBE construction contracting requirements
- **Strategy 2:** Help improve the capital stack and lending outcomes for MWBE firms and develop business supports for MWBE firms
- **Strategy 3:** Create programs for more efficiently matching local small businesses to affordable space opportunities throughout the city and broadly disseminate information about these efforts to MWBEs and would-be entrepreneurs from diverse communities
- **Strategy 4:** Create a business formalization program for small-scale businesses and identify market places or pop-ups in commercial corridors
- **Strategy 5:** Examine barriers for MWBE contractors in accessing funds from the Contractor Loan Fund and make necessary modifications

24 Annual Business Survey, 2018 (note: reference year is 2017); Mass Economics analysis

Employer Practices

Entry-level and middle-wage jobs are an imperative for broad-based opportunity in the City. Entry-level and middle-wage jobs (in, for example, healthcare) help build and restore the middle-class and, with proper employer practices around retention, can support job tenure and other factors that increase opportunities and wages. Although middle-wage jobs grew by almost 10% from 2010 to 2018 in the St. Louis MSA, middle-wage occupations in the city experienced practically no growth. Employer practices and workforce programs must be better aligned and responsive to the needs of both businesses in growing clusters and job seekers by involving businesses and service providers in program development and implementation.

- **Strategy 1:** Create St. Louis employer consortium focused on workforce practices to support entry-level and middle-wage employees
- **Strategy 2:** Establish a Lab Tech initiative among members of the employer consortium
- **Strategy 3:** Create new non-profit employee support organization
- **Strategy 4:** Integrate one-stop centers in employment centers to coordinate services
- **Strategy 5:** Improve transit options to nearby neighborhoods
- **Strategy 6:** Develop a messaging strategy and platform for communicating existing and emerging economic opportunities in the city

Measuring Outcomes

High quality data are central to this framework. They helped identify opportunities and shape strategies and will be critical in terms of tracking progress, creating public accountability, and correcting a course of actions when required by changing conditions. While the importance and value of the existing, publicly-available sources of local data cannot be understated, there is an undeniable dearth of data on sub-city, e.g., neighborhood, outcomes or measures on outcomes associated with specific projects. Addressing this gap is critical, especially for measuring outcomes by race,[25] which is central to tracking the progress of this framework and for creating a more inclusive and equitable economy in St. Louis. The importance of data also extends to neighborhood outcomes and vitality. Data points collected by SLDC to track outcomes of this framework—about half of which can be collected at the neighborhood or sub-neighborhood level—and data collected by individual organizations across the city (described above) can be combined with models of neighborhood vitality, including social and economic outcomes for residents, to create a neighborhood vitality index. We propose initiatives to increase civic data capacity and track neighborhood outcomes.

25 Lindsey, N., Colon-Smith, A., & Aufiero, C. (15 June 2020). SLDC Equitable Development Plan Draft.

Civic Data Capacity

- **Strategy 1:** Increase capacity at key civic and business organizations to develop new sources of high-quality data on outcomes by race and place
- **Strategy 2:** Create capacity to collectively store and access data on inclusion and capacity

Tracking Neighborhood Outcomes

- **Strategy 1:** Create a St. Louis Neighborhood Vitality Index (NVI)

Cluster Strategies

Following the principles outlined above, target clusters and strategies for the equitable economic development framework for the City of St. Louis were selected based on their fit with the city's existing economic assets and strengths, as well as their potential to become strengths with key interventions; opportunities to collaborate with regional partners; and their ability to generate broad-based economic opportunity in St. Louis. The requirement that strategies meaningfully increase economic opportunity for a broad set of St. Louis residents and workers means that target clusters must represent opportunities for growth in the number of inclusive job opportunities; and that new investments or strategic direction by SLDC and/or its partners can drive better outcomes. The first criterion—increase in number of inclusive job opportunities—eliminates so-called "local" clusters like healthcare, for which demand is largely limited by things like population and income, as well as many of the life sciences clusters, which tend to create jobs almost exclusively for workers with at least a four-year degree. This criterion ensures that the ultimate goal of the framework—to provide a roadmap for SLDC and its partners to create a more vibrant and equitable economy in the City of St. Louis—remains the focus.

The second criterion—that the growth trajectory can be altered in a fundamental way—eliminates industries and clusters for which there are already significant organizing efforts underway and there is limited opportunity to add complementary capacity. This criterion is critical for ensuring that limited public sector and nonprofit resources are deployed in ways that will maximize their impact on St. Louis residents and workers. Based on these criteria, the following clusters were selected as the focus of this inaugural inclusive growth framework:

City-Building

Despite being a nontraditional cluster, city-building is arguably one of the most foundational clusters, centered on the city's physical assets and engaging local talent – especially the capacity of local minority- and women-owned businesses (MWBEs) – to restore and revitalize said assets. City-building activities range in scale from site-level redevelopment and construction all the way up to city planning and visioning on a grand scale, incorporating initiatives like home repair funds and blight remediation. Today, the City of St. Louis boasts several major national development firms, and the expertise of these firms should be leveraged while also cultivating small-scale developers. The city-building vision embodies inclusive value creation, and a successful city-building cluster will provide opportunities for minority-owned firms, residents of color, and historically disadvantaged or left-behind neighborhoods to build equity and opportunity across the City of St. Louis.

- **Strategy 1:** Equip SLDC to proactively cultivate the city-building cluster around organized geographies
- **Strategy 2:** Build new and expand existing small developer and construction firm capacity via training, financing, TA, and programming supports
- **Strategy 3:** Invest in the expansion of existing workforce development programs for the construction industry
- **Strategy 4:** Develop a resident arts program to place rehab-able properties into the hands of owner-occupied live/work artist studios/residences

THE IMPROVEMENT, REMEDIATION, AND STRENGTHENING OF THE PHYSICAL AND BUILT ENVIRONMENT TO MEET CITY DEVELOPMENT GOALS TOGETHER COMPRISE WHAT WE TERM A "CITY-BUILDING" CLUSTER OF ACTIVITIES, FIRMS, AND WORKERS. FOR THE PURPOSES OF THIS CHAPTER, THE CITY-BUILDING CLUSTER INCLUDES THE FOLLOWING ACTIVITIES: CITY PLANNING AND VISIONING; BLIGHT, VACANCY, AND LAND REMEDIATION; REAL ESTATE DEVELOPMENT ACROSS THE CITY; AND CONSTRUCTION ACTIVITY, INCLUDING PROPERTY REPAIRS AND RENOVATIONS.

- **Strategy 5:** Develop a retail incubator with corresponding logistics hub, with a potential focus on a resilient food production and distribution cluster
- **Strategy 6:** Create local "Priority Zones" in which rezoning, permitting, and other processes are expedited, development fees are waived
- **Strategy 7:** Explore and expand ways to test and apply geospatial capabilities and insights to support city planning priorities

THE TDL CLUSTER CAN BE BROKEN INTO THREE DISTINCT SEGMENTS: DISTRIBUTION, TRANSPORTATION, AND SUPPLY CHAIN AND LOGISTICS. DISTRIBUTION REFERS TO THE HANDLING AND MOVEMENT OF GOODS; TRANSPORTATION REFERS TO THE SHORT- AND LONG-DISTANCE TRANSPORTATION OF MATERIALS BY TRUCK, RAIL, BOAT, OR PLANE; AND SUPPLY CHAIN AND LOGISTICS (SCL) REFERS TO THE PLANNING AND MANAGEMENT OF THE FLOW OF GOODS.

Transportation, Distribution, and Logistics (TDL)

St. Louis' under-utilized land and widespread vacancy, including of industrial properties, is a key potential asset in growing the city's transportation, distribution, and logistics (TDL) segment of the economy and, in the process, strengthening the cluster in the region and improving competitiveness against peers. Today, however, lack of focus and commitment, as well as a shortage of tools to address land issues, has resulted in a TDL cluster in the city that is relatively small and not keeping pace with national growth. These conditions stymie opportunities not only in TDL itself but also in complementary activities ranging from agricultural distribution and processing to new retail delivery models. The City of St. Louis needs a TDL cluster that can utilize currently unproductive land, support middle-wage job opportunities, and serve as an asset, not an impediment, to complementary cluster development. The development of TDL has taken on new importance with the acceleration of new retail and distribution in response to COVID and the potential for localization of supply chains, especially in healthcare-related products, which will require new types of local TDL capacity.

- **Strategy 1:** Equip SLDC to grow and support the TDL cluster
- **Strategy 2:** Utilize the land assembly fund to cover acquisition, predevelopment and site preparation costs for targeted areas
- **Strategy 3:** Using the Industrial Preservation Area (BIPA), streamline development processes for TDL businesses in targeted areas

Manufacturing

THE MANUFACTURING SECTOR IS AN IMPORTANT CONTRIBUTOR TO EMPLOYMENT AND ENTREPRENEURSHIP IN ST. LOUIS CITY. THE SMALLER MANUFACTURING ESTABLISHMENTS WITH FEWER THAN 100 EMPLOYEES ACCOUNT FOR ABOUT 40% OF THESE JOBS. IN THE LITERATURE, THESE ARE REFERRED TO AS "URBAN MANUFACTURERS."* AS A CLUSTER, URBAN MANUFACTURERS CAN INCLUDE THINGS LIKE CRAFT AND ARTISANAL ACTIVITIES, FASHION AND APPAREL, WOODWORKING AND FURNITURE MAKING, AND SMALL-SCALE FOOD PRODUCTION, AMONG MANY OTHER TYPES OF ACTIVITIES.

Manufacturing provides a broad set of benefits to the St. Louis economy: small and mid-sized firms have led a renaissance in once-vanishing industries like textiles, apparel, and leather goods that complement the city's existing strength in fashion; the capability to engage in production can only enhance some of the city's other key creative clusters like design and media; and the vitality of manufacturing plays an important role in the "St. Louis Makes" and "STL Made" branding efforts and more broadly, showcases the city's economy in a way that can be used in national attraction and local retention efforts. But the greatest promise of the cluster might lie in possibilities for inclusive growth, including support for middle-wage job opportunities for workers without four-year degrees and creation of a next generation of ownership that is as racially and ethnically diverse as St. Louis itself. As with TDL, changes brought on by COVID and responses to the pandemic increase the importance of and opportunities for greater local and regional manufacturing capability.

- **Strategy 1:** Equip SLDC to grow and support the manufacturing cluster
- **Strategy 2:** Create Design-Build District(s) leveraging the Industrial Preservation Areas and ecosystem of wrap-around services geared toward manufacturers
- **Strategy 3:** Organize a collective of manufacturers and educators to develop a pro-manufacturing campaign geared toward potential future workers
- **Strategy 4:** Organize workforce training and apprenticeship programs serving city residents to expand the manufacturing workforce in the city
- **Strategy 5:** Provide programming that includes training, financing and support services to assist in succession planning for small- to mid-sized manufacturers

* Mistry, N., and Byron, J. (2011). The Federal Role in Supporting Urban Manufacturing. What Works Collaborative. https://www.urban.org/sites/default/files/ publication/26966/1001536-The-Federal-Role-in-Supporting- Urban-Manufacturing.PDF

Software Tech

"SOFTWARE TECH" IS AN OCCUPATIONAL CLUSTER THAT CAPTURES THE FULL SPECTRUM OF SOFTWARE DEVELOPMENT AND MAINTENANCE ACTIVITIES FROM PROGRAMMING TO DEVELOPMENT TO TESTING TO ADMINISTRATION AND MAINTENANCE TO CUSTOMER SUPPORT. THERE IS NO STANDARD DEFINITION OF SOFTWARE TECH, AND ITS ACTIVITIES CUT ACROSS INDUSTRIES AND OCCUPATIONS.

Dominance in a technology segment does not assure large-scale job creation or anything other than meager opportunity creation for workers without advanced degrees. The development of a robust software tech cluster aims to ensure that technology segments in which St. Louis is or can be on the cutting edge—e.g., agtech, cybersecurity, financial services, geospatial, healthcare innovation—will translate into broad-based prosperity. By coordinating the city's and region's already considerable workforce, training, and education assets, especially in outreach and training efforts in disadvantaged communities, the software tech cluster can help generates thousands of middle-wage jobs that can be filled by a workforce that reflects the city's deep and diverse talent base. With emerging regional initiatives on advanced business services,[26] software tech in the City of St. Louis could be a key node in a broader set of regional capabilities around tech-focused business supports.

- **Strategy 1:** Equip SLDC to support the software tech cluster in the city
- **Strategy 2:** Coordinate with WTEs to size projected demand in the cluster, determine roles, establish channels of communication, and maintain accountability in training workers to meet short- and long-term software tech workforce demand
- **Strategy 3:** Formalize a software tech cluster organization, TechSTL

26 Economic Baseline Analysis (STL Economic Development Strategy). (2020).

Business-to-Business (B2B)

THE "BUSINESS-TO-BUSINESS" (B2B) CLUSTER IS COMPOSED OF FIRMS THAT PROVIDE A BROAD RANGE OF SUPPORT ACTIVITIES TO BUSINESSES (AS OPPOSED TO CONSUMERS, AS B2C FIRMS LIKE GROCERIES AND DAYCARES DO). CLIENTS ARE OFTEN ANCHOR INSTITUTIONS OR LARGE, PUBLICLY TRADED FIRMS THAT SELL SPECIALIZED GOODS AND SERVICES IN NATIONAL AND GLOBAL MARKETS, WHILE B2B FIRMS THEMSELVES ARE OFTEN SMALL OR MID-SIZED, PRIVATELY-HELD ENTITIES. UNLIKE SPECIALIZED SUPPLIERS THAT ARE PART OF ONE OR A SMALL NUMBER OF SPECIFIC NATIONAL OR GLOBAL SUPPLY CHAINS—SAY, MAKERS OF PARTS FOR AIRPLANE ENGINES—B2B FIRMS OFTEN PROVIDE SOMEWHAT STANDARD PRODUCTS AND SERVICES ACROSS A RANGE OF CLIENTS IN A TRADE AREA NO BIGGER THAN A MULTI-COUNTY METROPOLITAN AREA.

A vibrant business-to-business cluster (B2B) in the City of St. Louis will provide the rich support services sought after by firms looking to invest or relocate while creating new entrepreneurship and job opportunities for the residents of St. Louis. Today, the B2B cluster in the city is about 20% smaller than we would expect given the amount of economic activity, with white collar-type support activities weaker than more blue-collar activities. With understanding of the cluster's importance and targeted growth strategies, St. Louis can capture its proportionate share of future regional B2B growth, adding thousands of jobs and supporting resident opportunity and revenue generation within the city. By explicitly supporting existing and would-be minority- and women-owned entrepreneurs in the B2B space, cluster growth can help close the racial gaps in business ownership and revenue and middle-wage job holding.

- **Strategy 1:** Equip SLDC to develop the B2B cluster, including B2B-specific technical assistance and resources
- **Strategy 2:** Coordinate a collective local B2B program
- **Strategy 3:** Create a tailored capital strategy for MWBE firms in B2B
- **Strategy 4:** Support the development of shared spaces for White Collar B2B in mixed-use neighborhoods and Blue Collar B2B in industrial districts

THE GEOSPATIAL CLUSTER CAPTURES ACTIVITIES CREATING, UTILIZING, AND ANALYZING SPATIAL (E.G., GEOGRAPHIC) DATA ACROSS A VARIETY OF DISCIPLINES. THE 2016 ANNOUNCEMENT THAT THE NATIONAL GEOSPATIAL-INTELLIGENCE AGENCY (NGA) WEST FACILITY (KNOWN AS NEXT NGA WEST, OR N2W) WOULD STAY IN ST. LOUIS AT A NEW 100-ACRE CAMPUS IN NORTH CITY AT THE CORNER OF JEFFERSON AND CASS ENSURES THAT THE ROUGHLY 3,100 DIRECT JOBS ASSOCIATED WITH THE FACILITY WILL STAY IN THE CITY. JUST AS IMPORTANT, THE RELOCATION OF THE NGA HEADQUARTERS COULD ACT AS A FOUNDATION FOR THE CREATION OF A GEOSPATIAL CLUSTER THAT SUPPORTS THOUSANDS OF NEW JOBS IN APPLIED AREAS FROM PRECISION AGRICULTURE, TO URBAN PLANNING, TRANSPORTATION AND LOGISTICS, AND FINTECH, ESTABLISHING A KNOWLEDGE BASE THAT CAN EASILY BE TRANSFERRED TO OTHER DISCIPLINES AND BUILD UP STRENGTH IN RELATED INDUSTRIES.*

*Project interviews and roundtables

Geospatial

Academic, business, civic, and philanthropic leaders from across the city and the region are working diligently to make St. Louis one of the national hubs for geospatial technologies. At the heart of these efforts is the creation of a roadmap for industry growth, as well as talent attraction and creation, including preparing the city's K-12 students for futures in geospatial technology. At its broadest, geospatial offers an opportunity to "transition St. Louis into the 'Fourth Industrial Revolution,'" characterized by "the merging of physical and digital worlds."[27] Beyond this is a more prosaic but also critical opportunity: to leverage the new $1.75B NGA building ("N2W") at Jefferson and Cass in North City—and the thousands of workers who will travel there each day—to support new housing and commercial investments to create opportunities for St. Louis residents to engage in the revitalization as workers, residents, and business owners. It is critical that St. Louis adopt strategies that will ensure N2W serves to support vibrancy in the surrounding neighborhoods and not stand as a fortress, like some secure federal facilities.

- **Strategy 1:** Ensure that the neighborhoods surrounding NGA are included in planning and programming efforts related to NGA and geospatial more broadly
- **Strategy 2:** Prioritize physical development, including new and infill development, alongside anti-displacement surrounding NGA
- **Strategy 3:** Create strong connections between N2W, nearby neighborhoods and Downtown

27 TEConomy, "GeoFutures Advisory Committee: Pre-Read Briefing Materials," January 23, 2020

Hospitality and Tourism

The Hospitality and Tourism cluster supports thousands of jobs in the City of St. Louis. The firms, entrepreneurs, and workers who make up the cluster provide the goods and services that make tourists' time in the city memorable and enjoyable. The cluster has strong leadership and a vison for the necessary assets needed to attract additional events and tourists. In this framework, however, the cluster is asked to play an additional role: to collaborate with a broad range of stakeholders to accelerate the growth and transformation of downtown amenities (retail, restaurants) to improve quality of life for residents and workers alike, and to support residential investment and growth. At the heart of a vibrant and growing Downtown St. Louis must lie a symbiotic evolution of tourism, amenities, and residential activity. The recent Design Downtown STL strategy provides a detailed roadmap for supporting this evolution.

- **Strategy 1:** Implement a retail, entertainment and tourism growth and attraction initiative with emphasis on Downtown
- **Strategy 2:** Develop strategic programming for businesses with a high proportion of revenue from tourism, tailoring streams of programming to MWBEs and small firms
- **Strategy 3:** Support the development of a new hotel, consistent with the findings from the St. Louis Hotel Market Analysis

LIKE GEOSPATIAL, HOSPITALITY AND TOURISM (H+T) IS A CLUSTER THAT REQUIRES SUPPORTS IN TERMS OF PHYSICAL DEVELOPMENT IN ORDER TO CONTRIBUTE TO THE CITY'S GROWTH. ALREADY A MAJOR SOURCE OF ENTREPRENEURSHIP AND JOBS, H+T EMPLOYS PEOPLE IN ACTIVITIES SUCH AS ACCOMMODATIONS, AMUSEMENT PARKS, CULTURAL AND EDUCATIONAL EVENTS, GAMING, SPECTATOR SPORTS, AND TOURISM-RELATED SERVICES.

Supporting St. Louis Businesses and Regional Partnerships

We identify two functional roles that SLDC (and where relevant, other city EDOs) should play with regard to boosting cluster specializations in general and supporting employment districts/centers and commercial corridors: general business support functions and regional economic development partnerships.

Supporting St. Louis Businesses

- **Strategy 1:** Establish a robust Business Retention and Expansion (BRE) program, which will complement target cluster initiatives
- **Strategy 2:** Grow the SLDC toolbox to better manage the needs of the business community

Supporting Regional Partnerships

- **Strategy 1:** Bolster business attraction efforts by strengthening regional partnerships
- **Strategy 2:** Develop internal expertise in an existing or emerging regional specialization cluster

AN OVERVIEW OF THE CITY'S CLUSTER ACTIVITIES AND SPECIALIZATIONS IS PROVIDED IN CHAPTER 2: ECONOMIC AND DEMOGRAPHIC REPORT. IT IS WORTH CONSIDERING THESE STRENGTHS IN THE CONTEXT OF THE LARGER REGIONAL ECONOMY, TO PROVIDE PERSPECTIVE ON DISTINCTIVE AND MUTUAL CITY-REGION STRENGTHS AND CONSIDER HOW THOSE SHOULD SHAPE THE CITY'S GROWTH STRATEGIES.

Place Strategies

St. Louis is a large and diverse city that historically developed around commerce and job growth – first along the river and later around freight rail and highways. Like other cities, jobs and businesses often concentrate around key assets like infrastructure, major institutions, access to employees or other similar businesses. To provide a much clearer picture of city employment, this framework identified and evaluated different geographies where the city's jobs and businesses are concentrated, a necessary step in understanding the specific challenges facing businesses in different places and to identify current land utilization and opportunities for change.

The strategies that follow highlight the opportunities for place-based investment to help stimulate equitable job growth and improve access to services and employment. Although there are some neighborhoods in the city that are economically and racially diverse, the history of racial segregation in St. Louis is still visible today, and place-based initiatives aim to disrupt this legacy and increase economic opportunities in historically disadvantaged areas. To address the cross-cutting challenges that impact many different places within St. Louis, the first strategies relate to planning, management and land assembly. The remainder of this chapter is dedicated to the application of these policies and identification of potential investment to employment districts, employment centers and commercial corridors across the city.

Planning & Management

As with many cities, coordinating resources, investments and planning across political boundaries, organizational boundaries and public and private entities can be difficult. In St. Louis there are a large number of entities engaged in some form of planning including developers, community groups, advocacy organizations, SLDC, the city, the county, and regional organizations and non-profits. This has resulted in many documents that outline specific issues and needs with respect to racial equity, education, resiliency and greenways, to name a few. Some of these strategies are focused heavily on transforming the physical experience of the city (the Greenway, for instance) while others focus on organizational and policy change. The places where employment is concentrated in the city need to be shaped with a similar rigor and logic as the places where economic activity can be strengthened and expanded.

- **Strategy 1:** Create additional district redevelopment plans to coordinate public and private investment
- **Strategy 2:** Protect industrial use in targeted areas

Land Assembly

Land assembly involves gathering vacant and underutilized property into one, developable site and is critical to the physical and economic revitalization of the city. As one local stakeholder noted, "Without new approaches, we should assume this level of vacancy and blight for the next 40 years."[28] To help move the conversation forward regarding land acquisition with respect to the key clusters identified in this strategy, initial "opportunity sites" were identified for each and every employment district and center. Opportunity sites are defined as collections of vacant and/or underutilized properties that are adjacent to one another and could be assembled into larger, developable properties. (See map below for a preliminary set of sites.)

- **Strategy 1:** Maintain a list of critical opportunity sites
- **Strategy 2:** Create a land assembly fund to acquire and bank land for development

28 Project interviews and roundtables

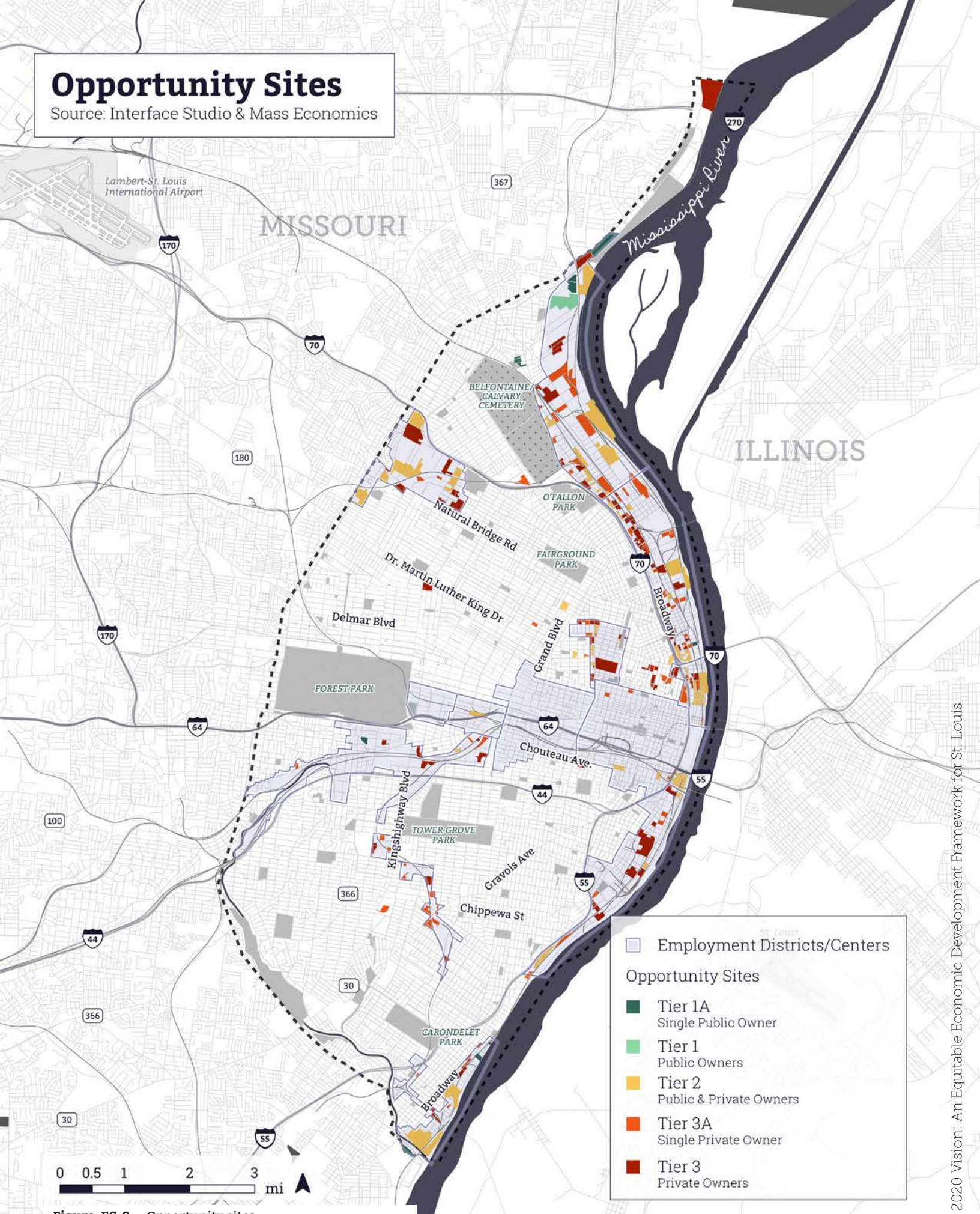


Figure ES-8. Opportunity sites

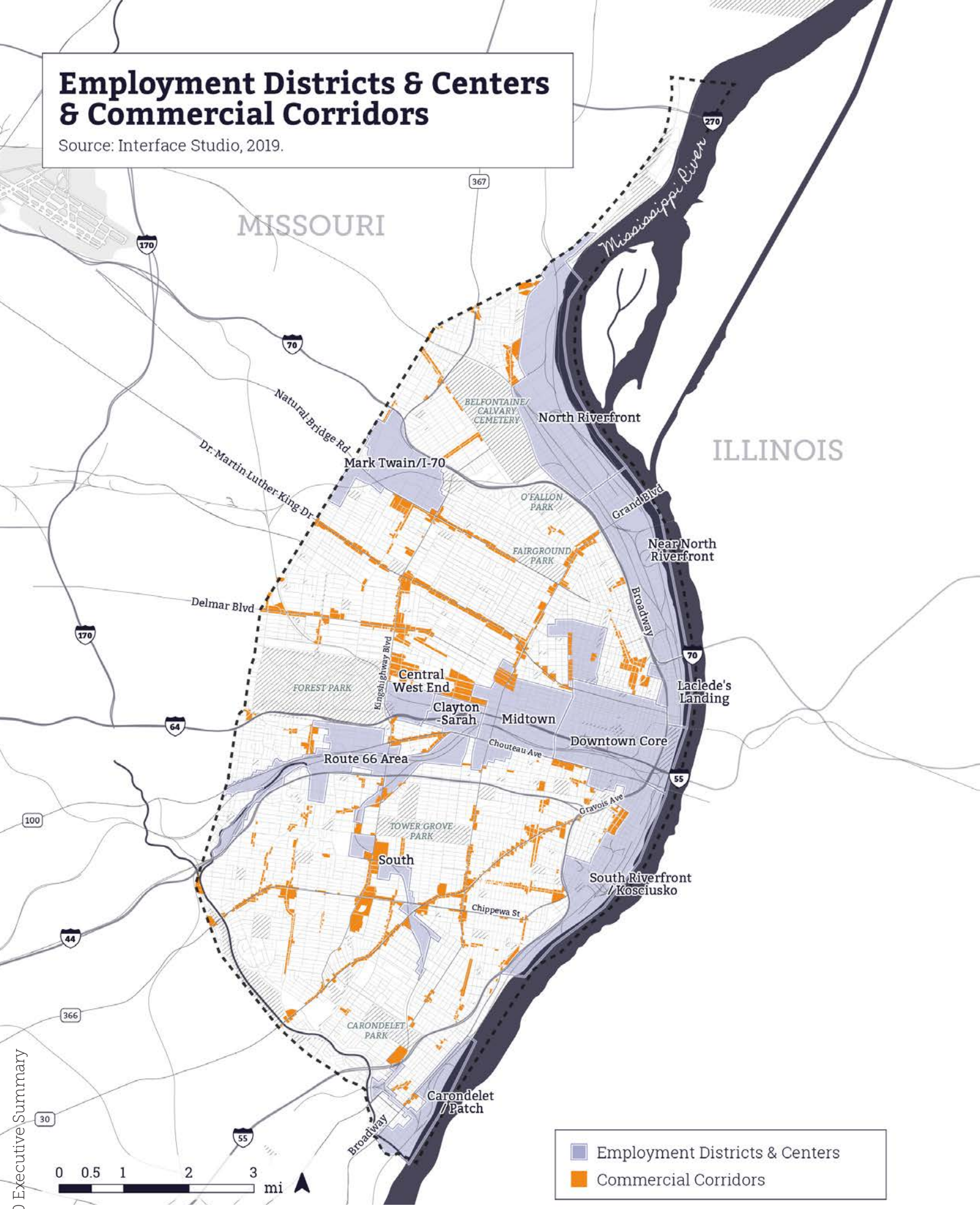


Figure ES-9. Employment Districts & Centers & Commercial Corridors

EMPLOYMENT AREAS	KEY PRIVATE INDUSTRIES YELLOW SECTORS ARE GROWING CITYWIDE
1 Carondelet/ Patch	Transportation & Logistics Metals & Chemicals Food Processing & Manufacturing Real Estate & Construction
2 Central West End	Health Services Hospitality & Tourism Business Services Education & Training
3 Clayton-Sarah	Business Services Household Goods & Services Transportation & Logistics Real Estate & Construction
4 Downtown Core	Business Services Marketing & Publishing Hospitality & Tourism
5 Laclede's Landing	Business Services Hospitality & Tourism
6 Mark Twain/I-70	Government Transportation & Logistics Food Processing & Manufacturing Community & Civic Organizations
7 Midtown	Education & Training Business Services Health Services
8 Near North Riverfront	Transportation & Logistics Food Processing & Manufacturing
9 North Riverfront	Transportation & Logistics Real Estate & Construction
10 Route 66 Area	Metals & Chemicals Real Estate & Construction Transportation & Logistics Community & Civic Organizations
11 South	Transportation & Logistics Real Estate & Construction Automotive Services Education & Training
12 South Riverfront/ Kosciusko	Food Processing & Manufacturing Education & Training
13 Near Northside	EMERGING AREA Geo-spatial Intelligence Pharmaceuticals

Figure ES-10. Key private industries in employment areas

Employment Districts

Employment Districts refer to places of major employment with one or more business clusters and supporting infrastructure, as well as adjacent land uses that support businesses and employees, including commercial retail, housing, entertainment, etc. While employment districts include residential uses, they are different than neighborhoods and retail streets. While no less important, neighborhoods and retail corridors are typically comprised of smaller businesses with smaller footprints. Employment Districts, due to the high number of concentrated employees and large buildings, often require special considerations to manage access, loading, truck traffic and parking. Recognizing the importance of commercial corridors across St. Louis, a special section of this work is devoted to identifying a range and diversity of corridors across the city to focus investment, support small businesses and improve neighborhoods.

Downtown and Laclede's Landing

Vision: A full, detailed vision for Downtown, which includes a portion of the Laclede's Landing District shown in this document, is documented in the Design Downtown STL Master Plan. As described in the last adopted plan for Downtown – Downtown Now – Downtown is an "economic hub and commercial engine," "a cultural and celebratory heart," and is the "public face for the region."[29] The Downtown Now plan recognized that "Downtown St. Louis has the opportunity to be a place where leading edge high technology business occurs"[30] and also emphasizes the need for more housing. This vision remains central to the future of Downtown and Laclede's Landing.

New space will serve the growing tech sector including new start-ups related to the NGA headquarters underway just to the north. The area's creative economy will grow around media, design and publishing, and the amenities associated with new housing will serve to further strengthen Downtown's role as the center for hospitality and tourism in the region and the State. New development in Laclede's Landing will help achieve housing goals and bring additional attractions and workspaces to serve growing companies. Critically, Downtown will diversify its business mix and focus on inclusive entrepreneurship by supporting legacy and existing businesses and supporting the needs of start-ups and growing businesses of all kinds.

- **Strategy 1:** Grow and diversify private sector jobs Downtown
- **Strategy 2:** Promote new retail and services in targeted areas in accordance with Design Downtown STL
- **Strategy 3:** Reuse ground floor commercial space for small business development and the creative sector
- **Strategy 4:** Promote the integration of new residential growth in Downtown and Laclede's Landing to support economic activity
- **Strategy 5:** Further enhance connections between Downtown and Laclede's Landing and expand marketing efforts
- **Strategy 6:** Evaluate new industrial mixed-use and flex space districts in Laclede's Landing

Near Northside

Vision: The next phase of the development of the Near Northside will be driven by the development of the N2W headquarters which will infuse North St. Louis with thousands of jobs. The N2W headquarters itself will be one of the country's major assets for geospatial jobs. With the investment, the district will expand with new housing to the north and east and a mix of new commercial and institutional uses along Jefferson Avenue. New transit and the Greenway will serve to link this investment with Downtown, Midtown and surrounding communities. NGA's new approach to innovation will increase its engagement with private sector firms, establishing St. Louis as a growing center for geospatial and technology jobs.

- **Strategy 1:** Develop space to support tech and NGA start-ups
- **Strategy 2:** Create strong connections between NGA, nearby neighborhoods and Downtown
- **Strategy 3:** Encourage new housing infill development
- **Strategy 4:** Plan for institutional and commercial uses along Jefferson Avenue
- **Strategy 5:** Continue to prom ote the reuse of Pruitt-Igoe for jobs-intensive development

29 Downtown Now, 1999

30 Downtown Now, 1999

Supporting Districts (Central West End, Midtown, Clayton-Sarah)

Vision: Central West End, Clayton-Sarah and Midtown will continue to drive job growth in the city with a continued focus on healthcare, business and financial services and education, as well as growing specializations in bioscience, software, and technology that will help to define the city's economic future. Continued housing growth will provide opportunities for employees to live nearby and create demand for additional services and amenities. The Foundry will be the newest attraction for the central corridor's hospitality industry, and the creative and performing arts already bring residents from throughout the region to the city. The vision is to connect the area's medical and educational institutions with creative and tech jobs to create a vibrant, mixed-use central corridor.

- **Strategy 1:** Coordinate key stakeholders / organizations in Midtown
- **Strategy 2:** Support ongoing planning for Cortex (more mixed-use)

Employment Centers

Employment Centers are places of employment with multiple businesses but without nearby retail stores, restaurants, housing, entertainment, etc. These are almost entirely industrial in use with some large format commercial uses. They require specific attention given the needs of these business with respect to infrastructure (rail access, Port activities, major roads and highways) and logistics including truck traffic and loading.

Carondelet/Patch

Vision: Carondelet is a dense and diverse community of residents and businesses. It combines traditional industrial jobs around transportation, distribution, and logistics and food processing with artisanal manufacturing and production. South Broadway has been improved to better serve residents and industrial operations and is home to creative and small businesses. Carondelet will remain the "capital of weird" in St. Louis and express its individuality through improved branding, historic architecture, and public art.

- **Strategy 1:** Assemble and market key sites for industrial development
- **Strategy 2:** Improve South Broadway and targeted cross streets as front doors to the districts
- **Strategy 3:** Create landscape buffers to protect nearby residential and community uses
- **Strategy 4:** Identify key infrastructure challenges

Mark Twain/I-70

Vision: Mark Twain/I-70 is envisioned as an industrial jobs center offering well-paying industrial job opportunities in the heart of North St. Louis. Mark Twain/I-70's access to freight infrastructure and I-70 as well as its proximity to the St. Louis Lambert International Airport will establish a hub for transportation, distribution, and logistics (TDL) activities. New and legacy businesses in urban manufacturing, business-to-business (B2B) services, construction and other industrial uses will reinforce Mark Twain/I-70 as one of the city's largest and most important industrial centers. Strategic land assembly efforts will open up development opportunities on multiple sites that will increase job density and economic activity. To the south and west, new green spaces will help buffer homes from the impacts of nearby industrial users. Natural Bridge Avenue will provide a valuable interface between Mark Twain/I-70 and surrounding communities where stores and services provide amenities for employees and residents and a one-stop pilot project connects residents and employees to services.

- **Strategy 1:** Improve Natural Bridge Avenue, Union Avenue, and Goodfellow Boulevard as the "front doors" of the district
- **Strategy 2:** Upgrade key intersections
- **Strategy 3:** Create landscape buffers to protect nearby residential and community uses
- **Strategy 4:** Assemble and market key sites for industrial development
- **Strategy 5:** Create a local business association

North and Near North Riverfront

Vision: The vision as documented in the 2012 North Riverfront Commerce Corridor Land Use Plan states that these areas will: "attract high-quality jobs by targeting emerging industries and innovative businesses; fully leverage its central location in the region and access to river, rail and highway infrastructure; significantly increase the quantity and diversity of products shipped through the area; provide quality services and unique amenities to remain competitive with emerging inter-modal hubs; leverage the environmental, and recreational assets of the Confluence Greenway Mississippi River corridor to add value for area businesses, improve conditions for employees and provide compatible uses for recreational users and; be a sustainable business community through improvements and initiatives that demonstrate a commitment to the triple bottom line: the economic, environmental and social value they bring to the local area and St. Louis region." Given the research conducted on clusters and the economy during this process, this vision remains relevant with the added emphasis that the Near North- and North Riverfront represent the primary opportunity in the city to boost employment in TDL. The riverfront offers a confluence of transportation infrastructure and facilities that is the foundation for increased activity in this cluster. Food and beverage processing could also expand along the river, capitalizing on agricultural traffic along the river, vacant and under-utilized land, and proximity to infrastructure.

- **Strategy 1:** Improve North Broadway, Hall and targeted cross streets as front doors to the districts
- **Strategy 2:** Vacate targeted streets to create larger sites and create value
- **Strategy 3:** Assemble and market key sites for industrial development
- **Strategy 4:** Focus landscaping and tree planting around I-70
- **Strategy 5:** Change use recommendations for the "Market District" district
- **Strategy 6:** Create a North Riverfront Community Improvement District (CID)

Route 66 and South St. Louis

Vision: Route 66 and South St. Louis employment centers will serve as vibrant centers for urban manufacturing, construction, B2B services and commercial offices and retail. These jobs centers are integrated into the fabric of surrounding communities and provide quality jobs for residents. Approximately one-fifth of the city's urban manufacturing employment is located in the Route 66 employment center – the highest share among the employment districts and employment centers. The South employment center has the highest percent of total jobs in urban manufacturing (just under one third of its jobs are in urban manufacturing).[31] Each employment center offers opportunities for redevelopment and new employment to reinforce their important role in the city's economy.

- **Strategy 1:** Improve Manchester and targeted cross streets as front doors to Route 66
- **Strategy 2:** Integrate new signage to promote each district
- **Strategy 3:** Improve key intersections
- **Strategy 4:** Assemble and market key sites for industrial development
- **Strategy 5:** Protect industrial use

31 Source: YTS, 2018; Mass Economics analysis

South Riverfront/Kosciusko

Vision: South Riverfront/Kosciusko will build on its legacy of food and beverage manufacturing businesses and proximity to Soulard Market to become the city's capital of food and beverage manufacturing. Freight rail and port facilities will continue to make the South Riverfront attractive for TDL, and the area will continue to expand jobs in local construction and business services. South Broadway between Geyer and Miller Streets, adjacent to the district, is an excellent location for smaller commercial and industrial businesses, as well as retail and restaurants to serve local employees and residents.

- **Strategy 1:** Improve South Broadway and targeted cross streets as front doors to the districts
- **Strategy 2:** Assemble and market key sites for industrial development
- **Strategy 3:** Create a local business association

Commercial Corridors

Commercial Corridors refer to places of commerce and employment that extend multiple blocks and serve local neighborhood and/or regional shopping and service needs outside of larger employment districts and centers. These corridors have been identified through multiple information sources, including the St. Louis Strategic Land Use Plan, citywide land use maps, employment data, and local knowledge from multiple stakeholders. For this plan, commercial corridors are defined as commercial or mixed-use blocks that are not located within a larger employment districts and centers. (See Figure ES-9 above.)

There is no one vision for commercial corridors across the city as each corridor has its own history, personality, and current needs. The commercial corridors in St. Louis are the front doors for the city's communities. As such, they need creative strategies that both support the needs of nearby communities and provide job opportunities for residents. Commercial corridors should indeed remain central to providing a home for locally-serving retail and commercial services where possible. However, these corridors should also showcase the creativity and resolve of the city and its residents by providing locations for greening, stormwater management, community gardening, community uses, new housing, and small offices that provide a range of job opportunities in the city. Commercial corridor revitalization can also be aided by attraction of other small- and mid-sized businesses, which add to foot traffic and consumer activity during day-time hours. Long standing issues of disinvestment and inequity cannot be ignored in this context. To help address these concerns, a data analysis was designed to help identify a diverse range of commercial corridors from across the City for early stage action and investment. For each corridor, a menu of potential improvements will be identified through partnerships with nearby neighborhood leaders and business owners.

- **Strategy 1:** Annually measure the health of commercial corridors across all St. Louis neighborhoods
- **Strategy 2:** Align investments along commercial corridors to best support surrounding communities and existing and small business owners
- **Strategy 3:** Create a new Main Streets initiative

CURRENT CRISES: A CALL TO ACTION

Concurrent with strategy development was the emergence of COVID-19. Missouri recorded its first known case in March 2020 in St. Louis County, [32] and the city experienced its first case shortly thereafter.[33] The COVID-19 pandemic has impacted (and killed) workers, businesses, and livelihoods across the globe, disrupting revenue streams and supply chains for many small businesses and entrepreneurs. COVID-19 has wrought immediate and debilitating economic and social consequences – especially in light of its disproportionate impact on people of color – and it will leave a lasting mark on the St. Louis economy and its residents. Of course, priorities must shift as we respond to this crisis. This means that sources of support for proposed action items may change, or that action items may be delayed as other initiatives take priority. From February to May 2020, the increase in the unemployed population in the City of St. Louis increased 237%,[34] higher than the increase in Missouri overall (157%).[35] As of this writing, the pandemic's peak unemployment rate surpassed that of the Great Recession in both the City of St. Louis and the U.S.[36]

The devastating impacts of COVID-19 have already been widely experienced, and they will continue to be felt for months, if not years. It has been estimated that over 40% of the jobs eliminated during the pandemic will be lost forever.[37] In many cases, revenue streams – for both the public and private sectors – have been decimated and will require significant federal assistance to stabilize their balance sheets (and the public sector will continue to be called upon in the coming months and years to provide financial and other forms of aid to recovering private sector businesses and communities). Some business models have been completely dismantled with shelter-in-place orders and limited travel. Conventions and sporting events are main attractions and drivers of revenue for Downtown businesses in the hospitality and tourism cluster, and actual and anticipated cancellation of events poses huge challenges for these businesses.[38] As of this writing, multiple conventions had been cancelled, and although major league baseball (MLB) had scheduled a 60-game season, games will be played without fans in the stadia, muting most if not all of the usual economic impact of the Cardinals.

In response to the pandemic, consumer preferences and needs are changing dramatically, in some cases, upending traditional supply chains and in others, like restaurant and grocery, remaking retail and distribution models. In the wake of local and state re-openings across the country, firms will be required to adopt COVID-19 safety precautions for their workers and customers; for manufacturing firms, this may involve adding shifts or adapting their assembly lines to properly distance workers from one another. For firms across a wide range of industries, there will be increased demand for personal protective equipment (PPE) for workers and customers alike. Ultimately, these shifts raise concerns about business livelihood in a post-COVID world and how businesses can remain relevant in the "new normal." SLDC and the City of St. Louis must proactively engage businesses and entrepreneurs in the city to understand their current and evolving needs and how public support should be directed.

In addition to these COVID-induced hardships for businesses, this period has illuminated the magnitude of racial disparities in the city, the region, and across the U.S. It is well-documented that people of color have experienced worse COVID-19 outcomes, owing in large part to weaknesses and biases in the healthcare system, high concentrations of employment in frontline and "essential" worker roles, overwhelmingly deficient policies around paid sick time and access to childcare, and environmental injustices that lead to higher rates of complicating, pre-existing conditions (e.g., asthma),[39] all of which derive from generations of systemic racism. The first COVID-19 fatality in the City of St. Louis was a Black/African American woman, Jazmond Dixon – with no pre-existing conditions except her skin color.[40]

32 Governor Parson, state, and local officials confirm first case of COVID-19 to test "presumptive positive" in Missouri. (2020, March 7). https://governor.mo.gov/press-releases/archive/governor-parson-state-and-local-officials-confirm-first-case-covid-19-test

33 Miller, L. (2020, March 16). City of St. Louis Announces First COVID-19 Case. Riverfront Times. https://www.riverfronttimes.com/newsblog/2020/03/16/first-case-of-covid-19-announced-in-st-louis-city

34 The number of unemployed people went from 6.1K in February 2020 to 20.5K in May 2020, out of a labor force of 152K in May 2020.

35 BLS Local Area Unemployment Statistics

36 Missouri Department of Labor

37 Barrero, J. M., Bloom, N., & Davis, S. J. (2020). COVID-19 Is Also a Reallocation Shock (Working Paper No. 2020–59). Becker Friedman Institute for Economics at UChicago. https://bfi.uchicago.edu/wp-content/uploads/BFI_WP_202059.pdf

38 Merrilees, A. (2020, June 1). Church of God in Christ conference, which draws tens of thousands to St. Louis, canceled due to COVID-19. St. Louis Post-Dispatch. https://www.stltoday.com/lifestyles/health-med-fit/coronavirus/church-of-god-in-christ-conference-which-draws-tens-of-thousands-to-st-louis-canceled/article_7ba97c17-a354-55fe-88df-1c6e2bddd03f.html

39 COVID-19 in Racial and Ethnic Minority Groups. (n.d.). Centers for Disease Control and Prevention. https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/racial-ethnic-minorities.html

40 Davis, C. (2020, March 27). Jazmond Dixon, The First In St. Louis To Die Of COVID-19, Had Mom At Her Side. St. Louis Public Radio. https://news.stlpublicradio.org/post/jazmond-dixon-first-st-louis-die-covid-19-had-mom-her-side#stream/0

"NEVER ALLOW A GOOD CRISIS TO GO TO WASTE. IT'S AN OPPORTUNITY TO DO THE THINGS YOU ONCE THOUGHT WERE IMPOSSIBLE."*

COVID-19 also threatens the diversity of business ownership, already a challenge in the City of St. Louis. As of this writing, resources have been and continue to be assembled for small businesses; to call out a few, the City of St. Louis has provided emergency financial support, as well as personal protective equipment to small businesses; Invest STL has created the Neighborhood Solidarity Fund to provide grants to small businesses in areas affected by COVID in the City of St. Louis, St. Louis County, and East St. Louis; and a joint effort between SLDC, the St. Louis Economic Development Partnership, the St. Louis County Port Authority, and area banks has led to the development of the Small Business Resource Fund to provide interest-free loans to businesses experiencing hardship due to the pandemic.

This period of crisis is an opportunity. Amidst the COVID-19 pandemic, the Black Lives Matter movement has elevated public awareness of police brutality against Blacks/African Americans, demanding justice. Never before has the public been so conscious of racial disparities – and so poised for action and change. The city's response to COVID-19 today and in the coming weeks and months will affect its residents, workers, businesses, and economy for decades. Through Black Lives Matter and the response to COVID-19, the landscape of potential partners has and will continue to evolve. New organizations have formed, and others have scaled and mobilized support for equitable economic development in the city.

Going forward, SLDC and the City will need to be more accountable than ever before. Longstanding partners may also be shifting short- or long-term priorities and programming as their institutions respond to COVID-19. SLDC and the City must leverage this changing landscape of partners by engaging coalitions of residents and other groups for implementation, using these partners to establish new and strengthen existing accountability mechanisms for implementation. If equity is not integral to the city's post-COVID recovery, the disproportionate impact of the pandemic on POCs in St. Louis will erase any gains made on inclusion and will only exacerbate the racial/ethnic inequalities in the city. Implementation and post-COVID recovery will occur in a time of unprecedented public involvement and transparency of government actions, creating an opportunity to redress the inequalities in the city and permanently embed equity into the city's economic trajectory.

*Emanuel, R. (2020, March 25). Let's make sure this crisis doesn't go to waste. Washington Post. https://www.washingtonpost.com/opinions/2020/03/25/lets-make-sure-this-crisis-doesnt-go-waste/

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