CATLYST Strategy Committee Workshop

June 22, 2017

Presented by the Atlanta Regional Commission and
Avalanche Consulting, Inc.

ATLANTA REGIONAL COMMISSION

avalanche

Agenda

Introductions

C**ATL**YST Framework

Data Narrative

Workshop

Closing Remarks

CATLYST

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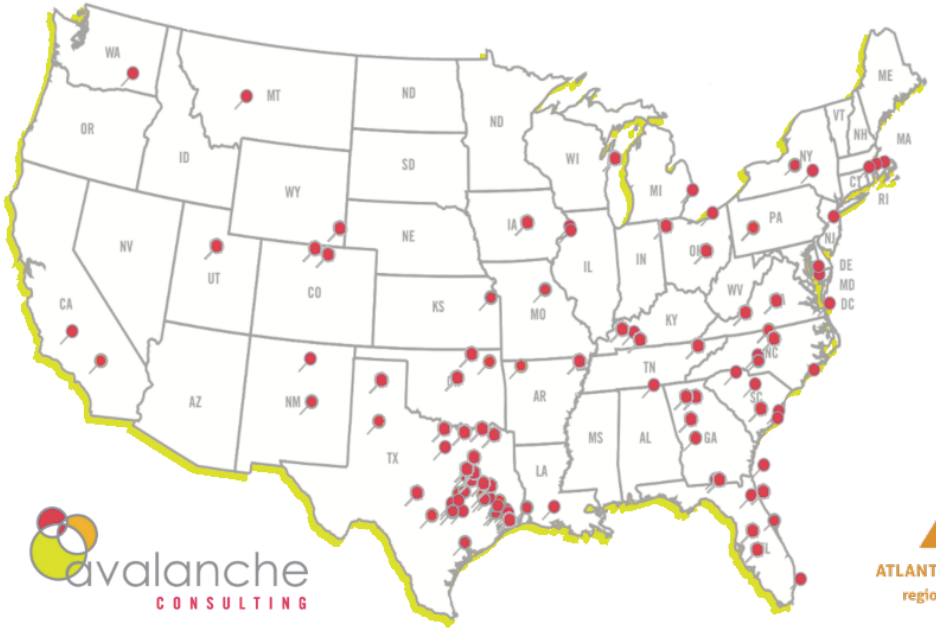
- National economic development strategists
- Serving 100+ communities since 2005
- Headquartered in Austin, Texas
- 80+ years of combined experience

<u>Services</u>

- Economic development strategies
- Customized research
- Organizational strategies
- Workforce studies
- Marketing plans
- Facilitation

We are strategists for the nation's top performing economies.



Charleston Regional Development Alliance

Columbus 2020

Greater Oklahoma City Chamber

Fort Worth Chamber

Charlotte Regional Partnership

JAXUSA Partnership For Regional Economic Development

The Miami Foundation For A Greater Miami

Gainesville Area Chamber of Commerce

Houston The City With No Limits

avalanche Consulting

ARC Atlanta Regional Commission regional impact + local relevance

Moody Foundation

provo

The Beacon Council foundation

UpstateSCAlliance

Longmont Economic Development Partnership

Plum Creek Growing Value from Exceptional Resources

Team Texas

Economic Alliance Houston Port Region

iG Innovation Gainesville

Florida The Perfect Climate For Business.

Baytown West Chambers County Economic Development Foundation

Research Valley

BastropTX Economic Development Corp www.BastropEDC.org

Decatur Business. Texas Style.

Greater East End District The People Behind The Progress

CenterPoint Energy

Roanoke Regional Partnership

Katy Area Economic Development Council Energy Grows Here

SBDC Montana

Brownwood TX Feels Like Home

Bay Area Houston Economic Partnership

Rowlett TX

New River Valley Economic Development Alliance

Lowcountry economic alliance

EDC Economic Development Corporation Sarasota County

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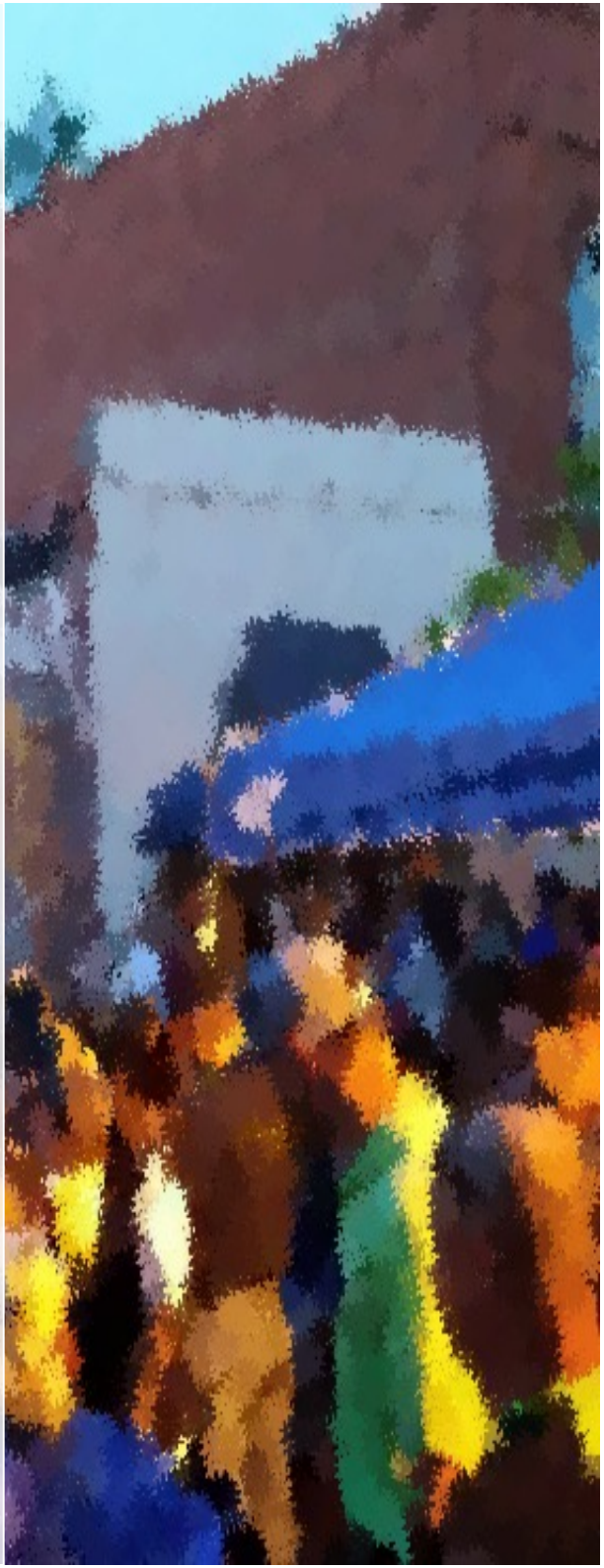

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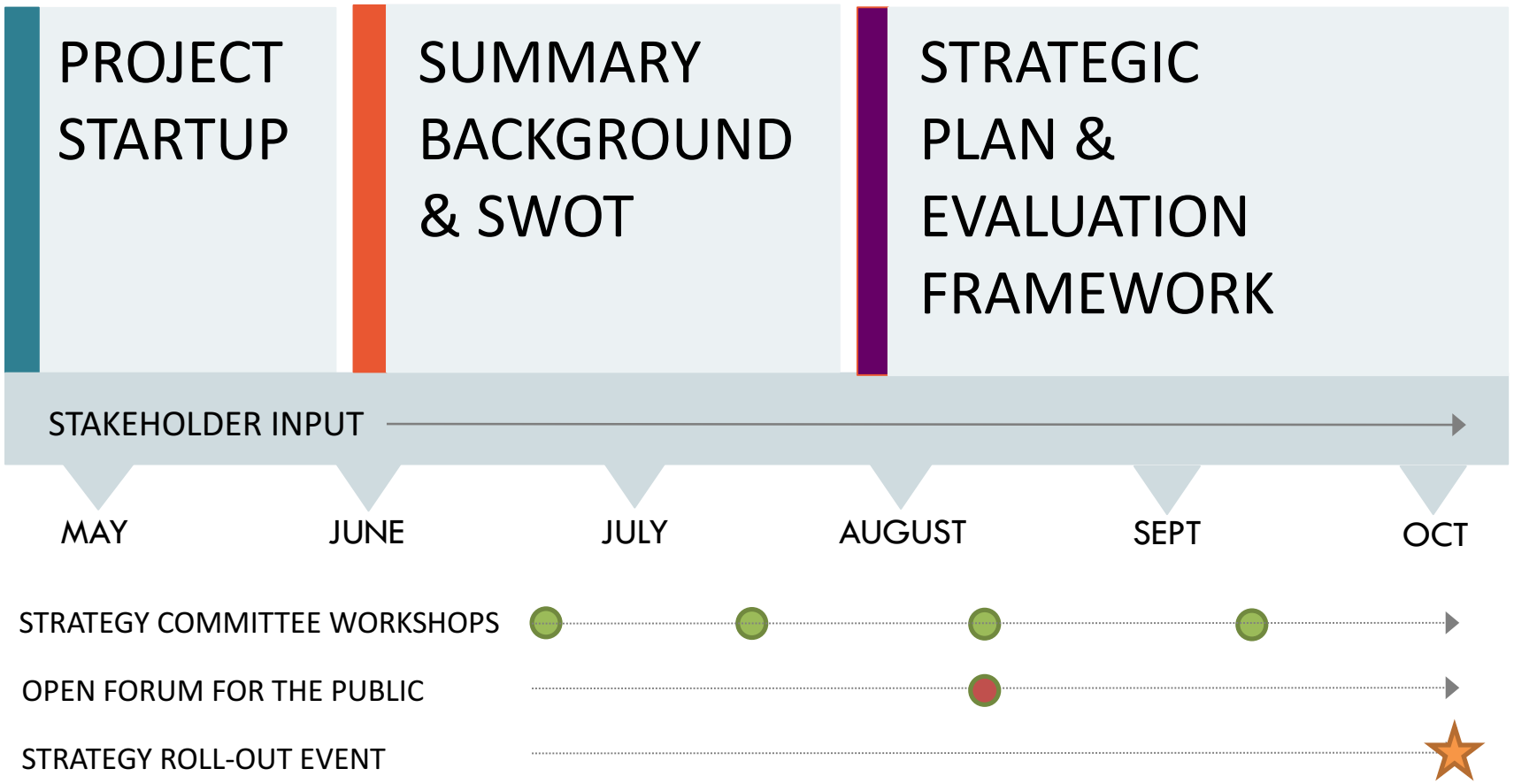
Objectives

C**ATL**YST will serve as Metro Atlanta's next 5-year roadmap on issues related to **regional competitiveness**.

- **Next Level** Strategy
  Unlimited by priorities of the past
- **Regional** Strategy
  A coordinating strategy for the entire region; ARC convenes and everyone has a role
- **Connected** Strategy
  Un-siloed, highly collaborative approach, seeking solutions at the connecting points among issues

Planning Process



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Deliverables

PROJECT STARTUP

Project Work Plan & General Schedule

Stakeholder Engagement Plan & Schedule

SUMMARY BACKGROUND & SWOT

Summary Background & SWOT Analysis

STRATEGIC PLAN & EVALUATION FRAMEWORK

Strategic Action Plan & Evaluation Framework

Final Regional Competitiveness Strategy Report and Executive Summary

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Strategy Committee Responsibilities

- Participate in Strategy Committee Workshops
- Provide Feedback to Shape the Strategy
- Promote the C**ATY**LST Survey
- Champion C**ATL**YST!
- Participate in Implementation

Strategy Website and Public Survey

CATLYST Homepage:

http://atlantaregional.org/catlyst/

CATLYST Community Survey:

www.surveymonkey.com/r/cATLystStrategy

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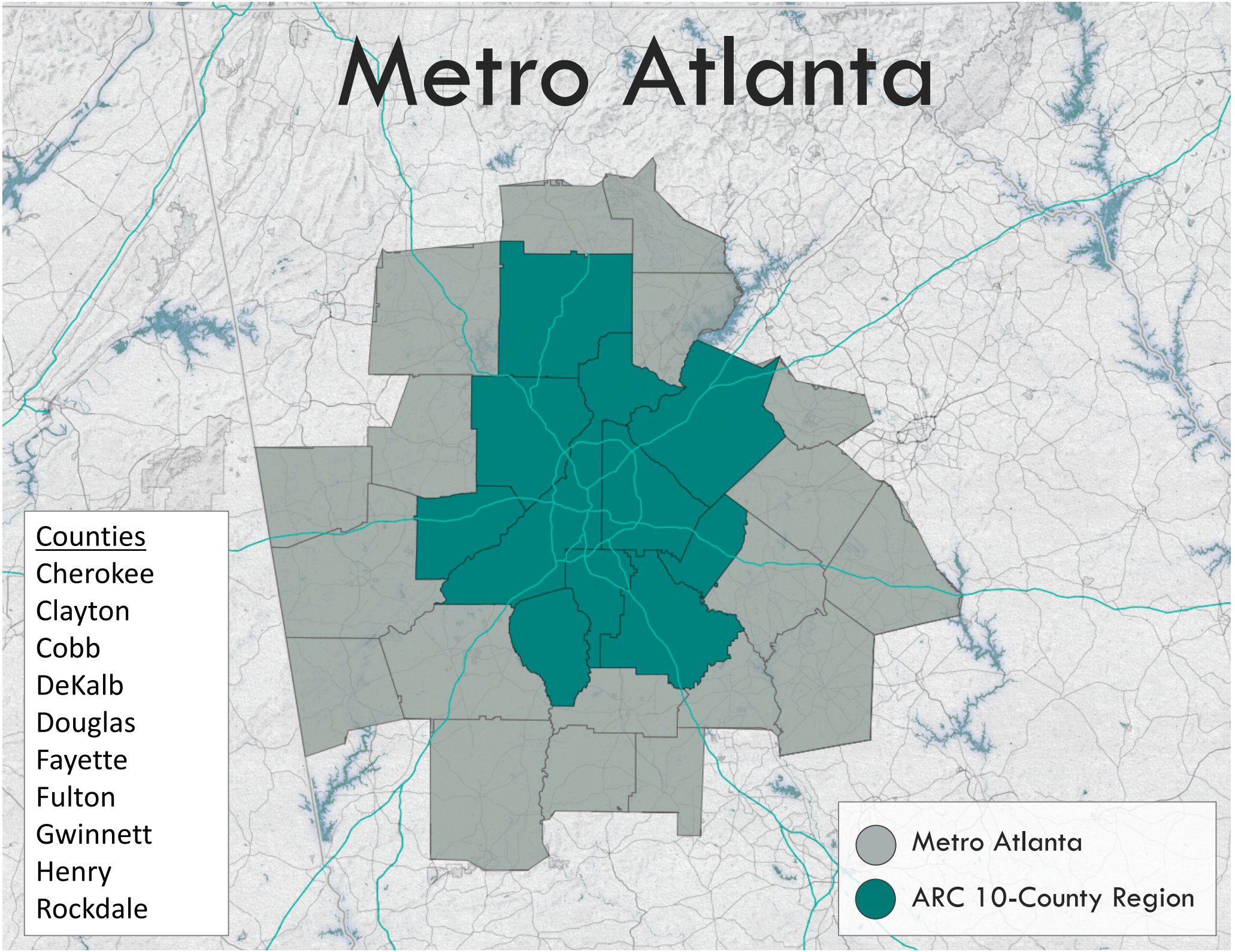
Metro Atlanta



Metro Atlanta is among the most dynamic regions in the U.S.

Historically, population and employment gains outperform the U.S. average.

EMPLOYMENT GROWTH
1992 - 2017

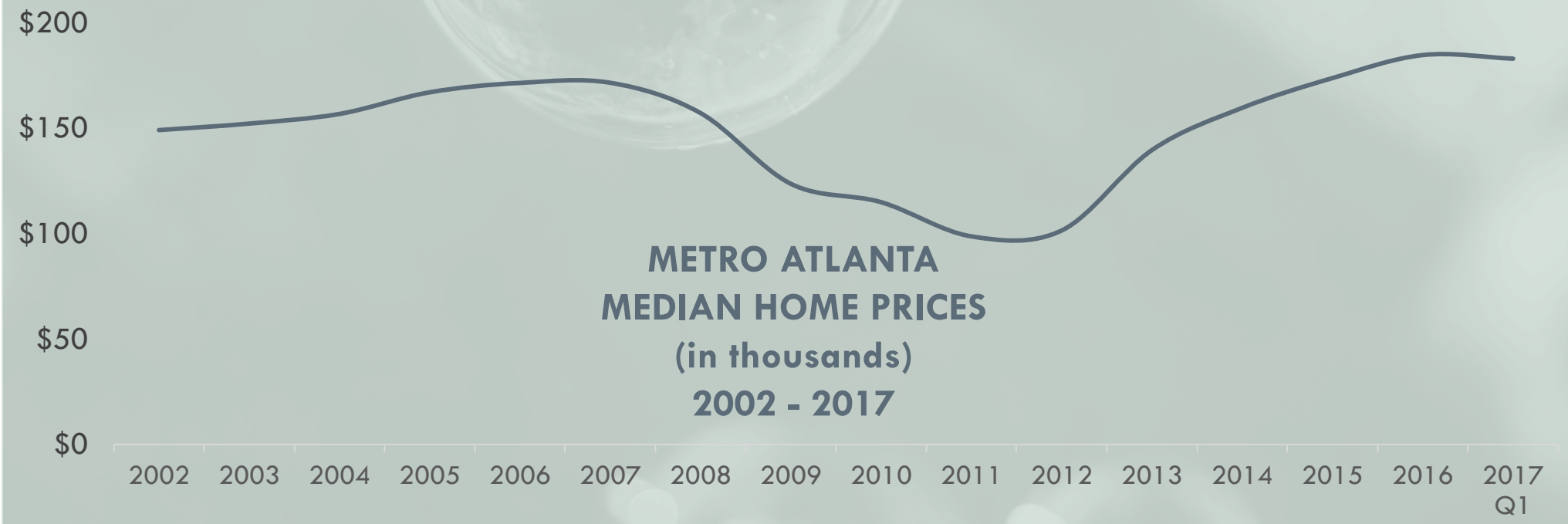
POPULATION GROWTH
1992 - 2016

CATLYST

SOURCE: BUREAU OF LABOR STATISTICS, US CENSUS BUREAU; AVALANCHE CONSULTING

The housing collapse exposed vulnerabilities.

EMPLOYMENT GROWTH



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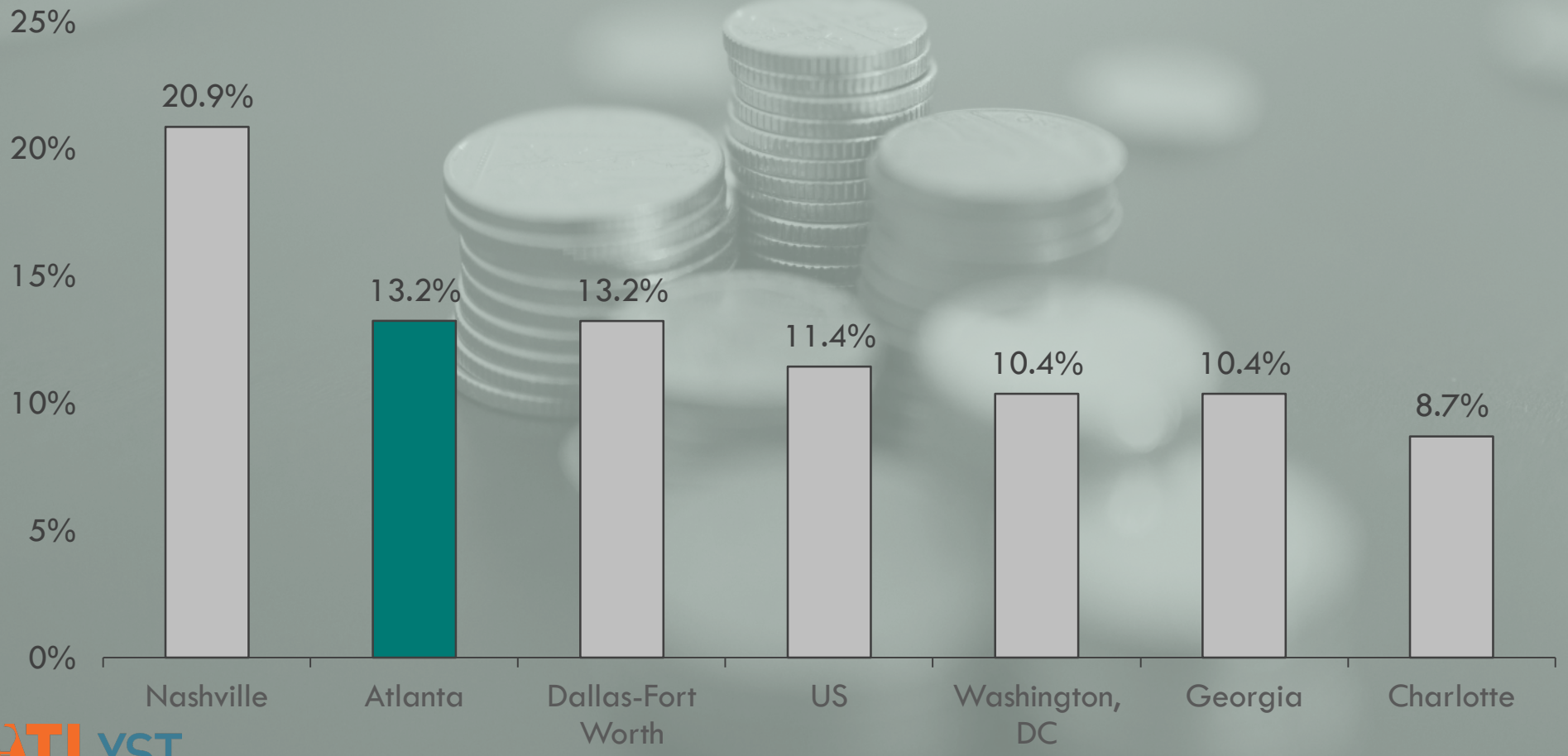
SOURCE: EMSI, NATIONAL ASSOCIATION OF REALOTRS; AVALANCHE CONSULTING

Median household income gains have been comparatively strong.

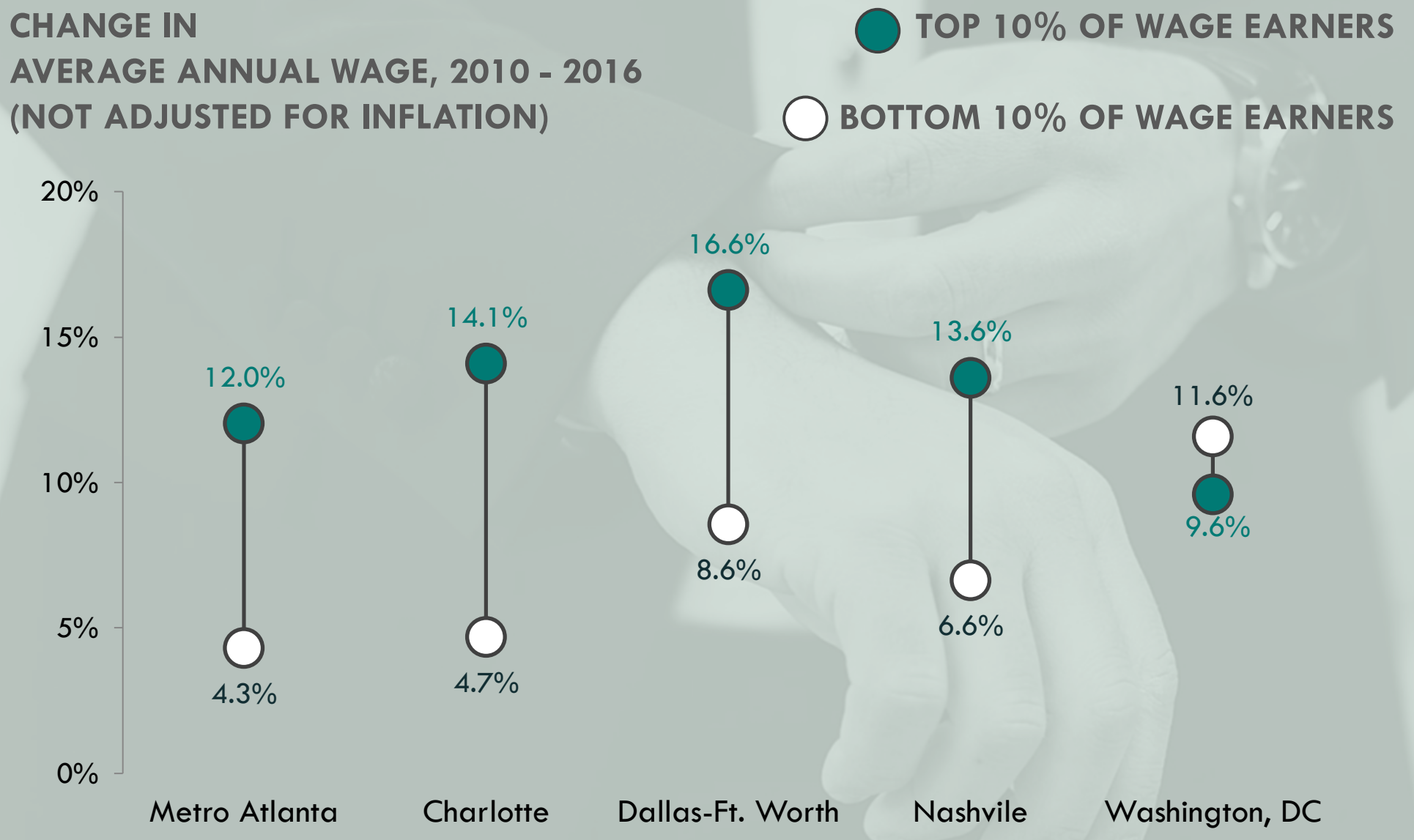
CHANGE IN MEDIAN HOUSEHOLD INCOME 2010 – 2015 (NOT ADJUSTED FOR INFLATION)



CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

Wage gains in Metro Atlanta are disproportionately enjoyed by high income individuals

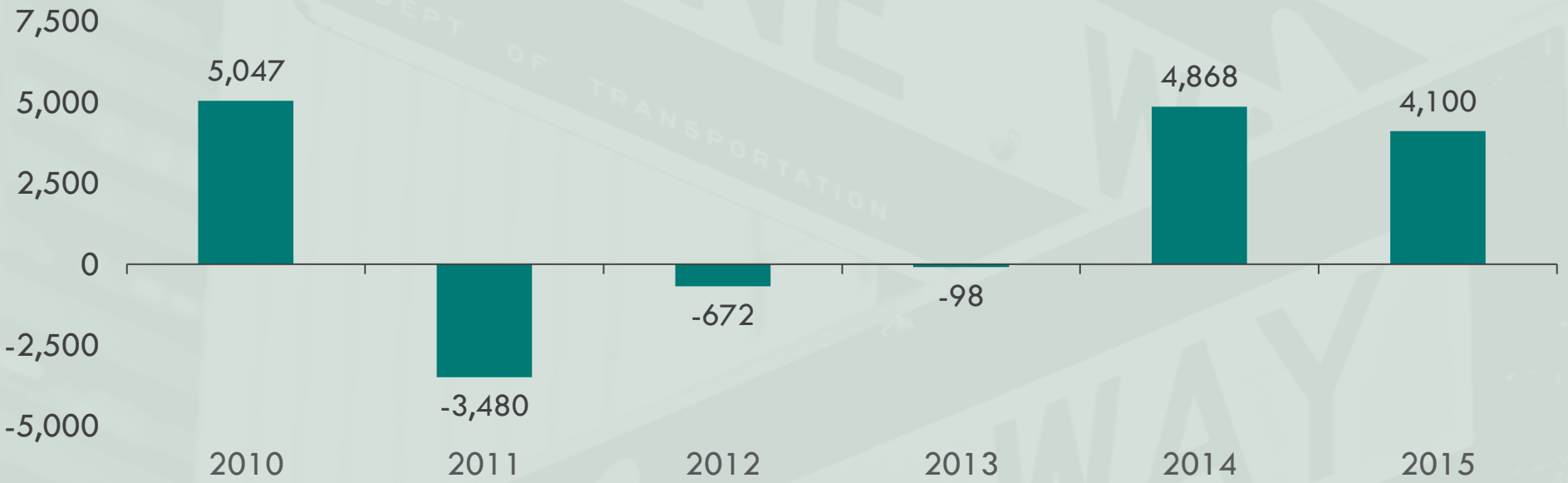


CATLYST

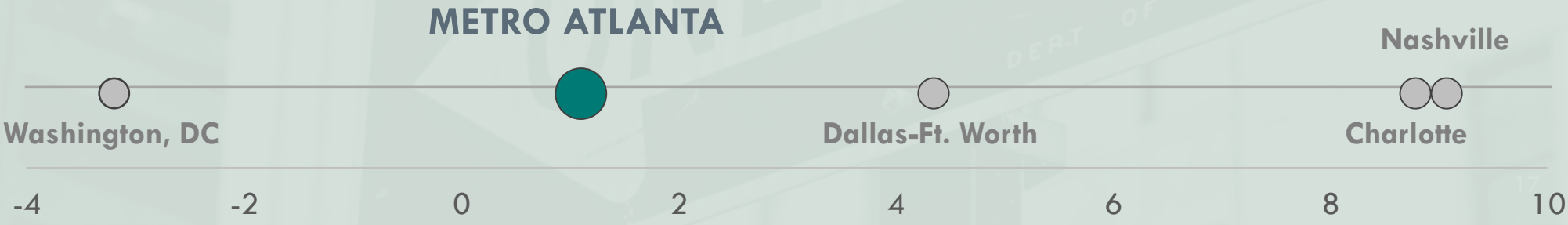
SOURCE: BUREAU OF LABOR STATISTICS; AVALANCHE CONSULTING

Talent attraction has been uneven and trails other regions.

NET INFLUX OF COLLEGE EDUCATED MIGRANTS INTO METRO ATLANTA



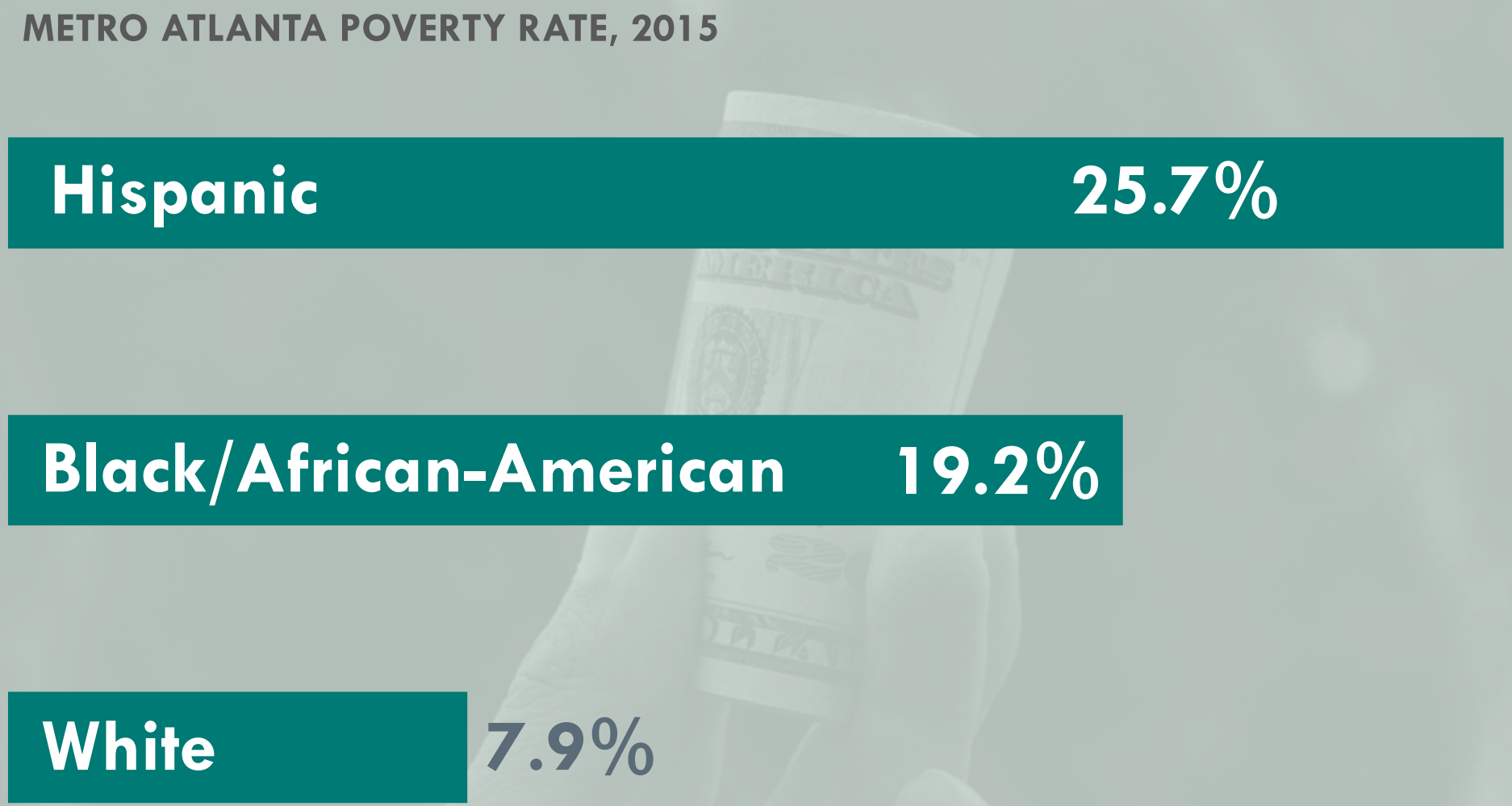
NET INFLUX OF COLLEGE EDUCATED DOMESTIC MIGRANTS INTO REGION (PER 1,000 RESIDENTS) 2015



CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

There are sizable economic disparities between racial and ethnic groups.

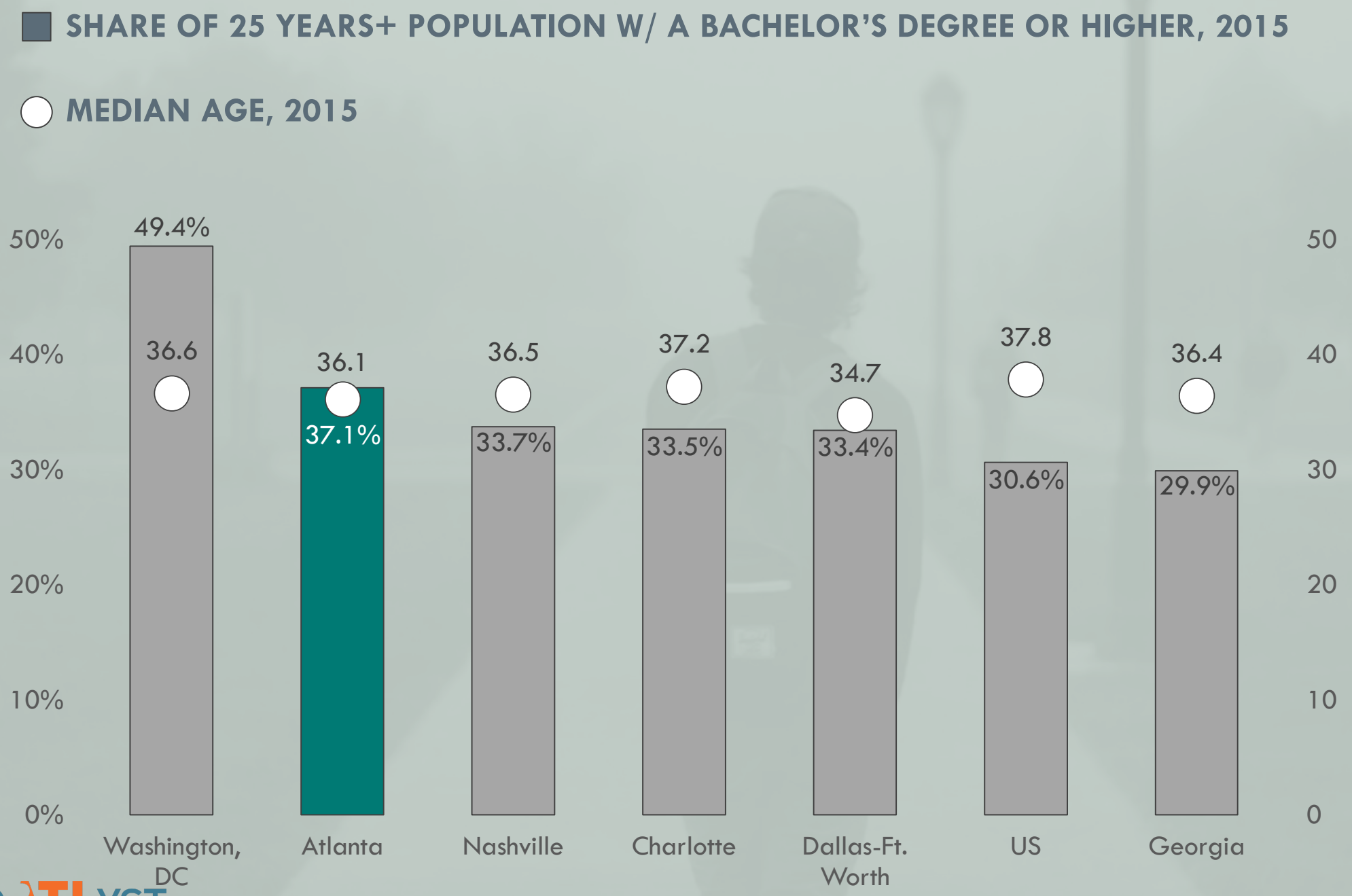


CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

Despite these challenges, Metro Atlanta continues to provide an environment rich in opportunities for both individuals and businesses.
CATLYST

Metro Atlanta is young and well educated.

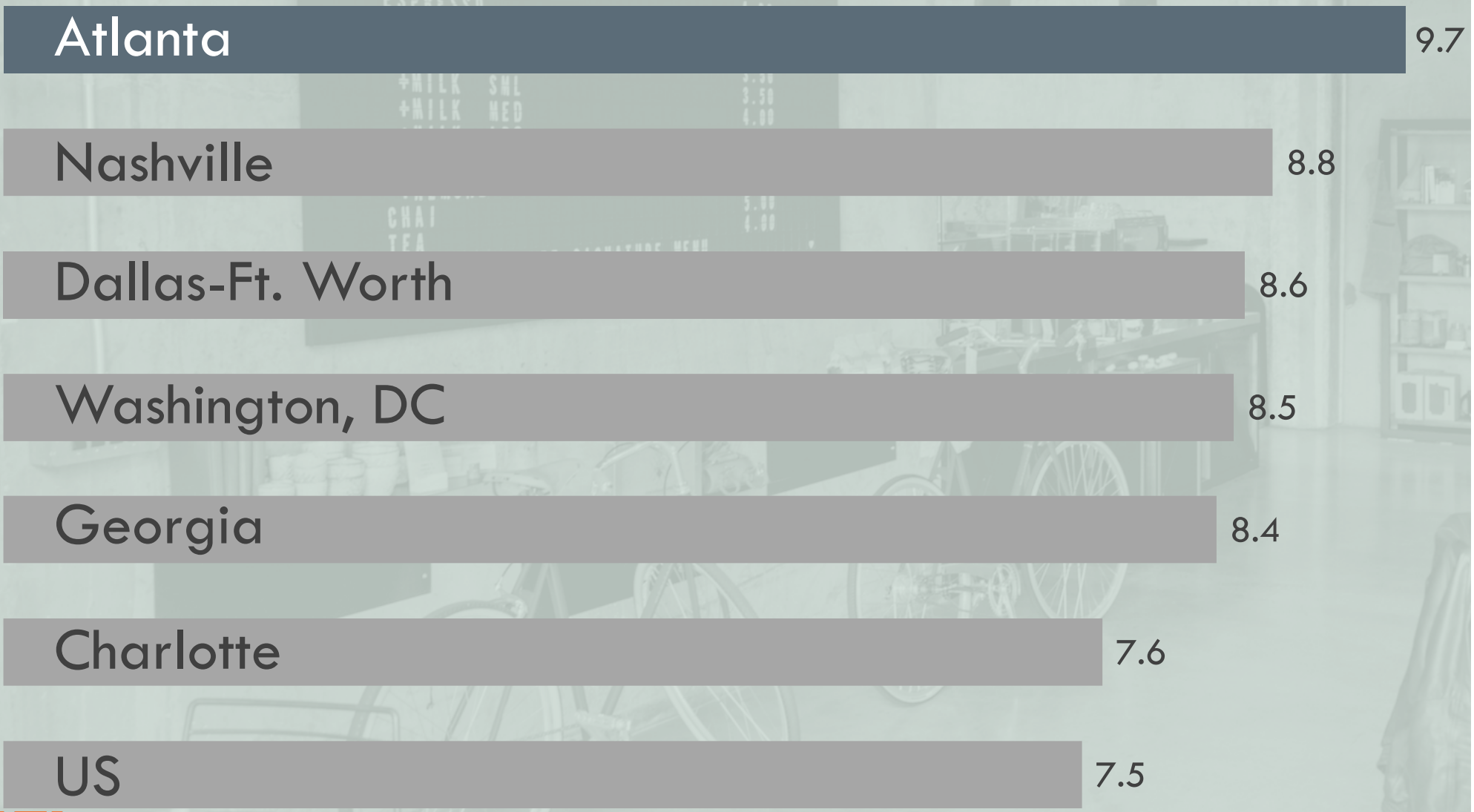


CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

Metro Atlanta is entrepreneurial.

NON-EMPLOYERS PER 100 RESIDENTS, 2015



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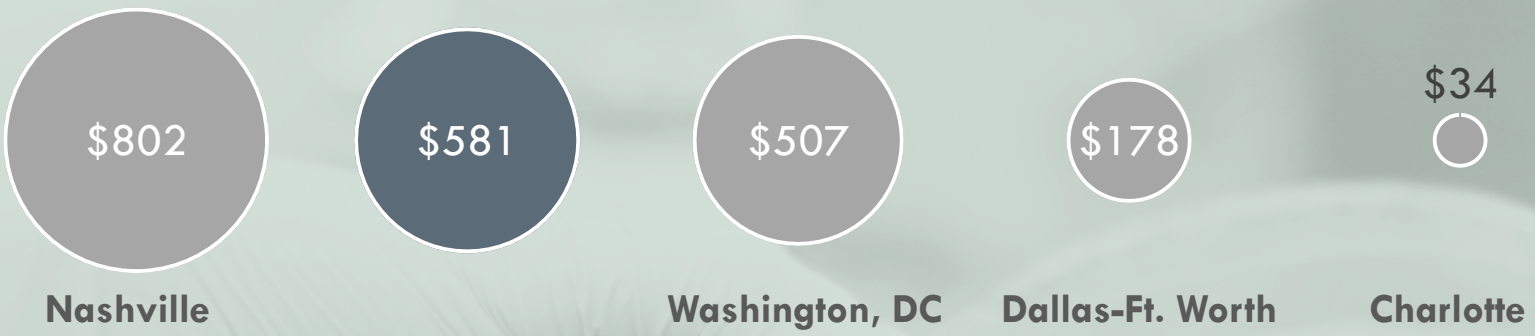
SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

Metro Atlanta is a significant R&D hub.

ACADEMIC R&D EXPENDITURES PER LOCAL JOB, 2015



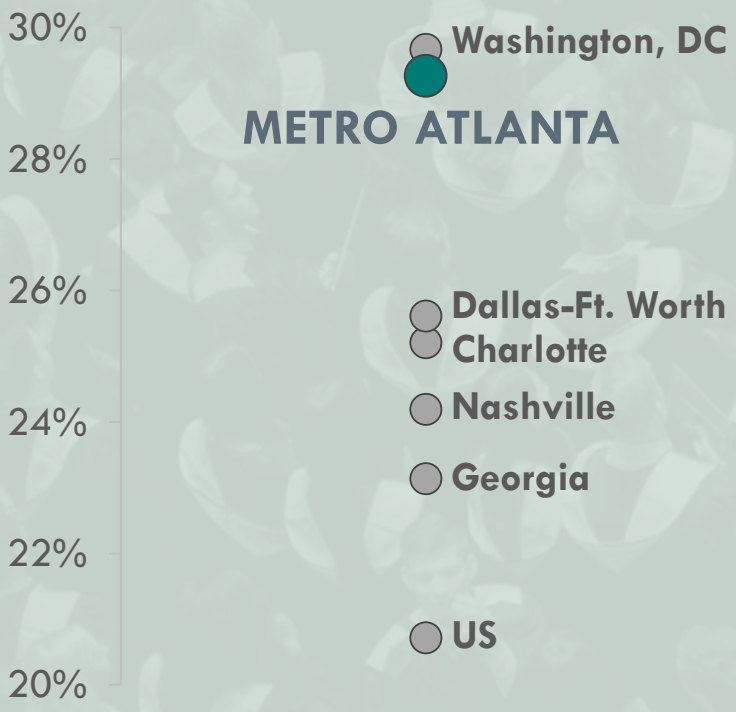
VENTURE CAPITAL FUNDING PER CAPITA, 2015

CATLYST

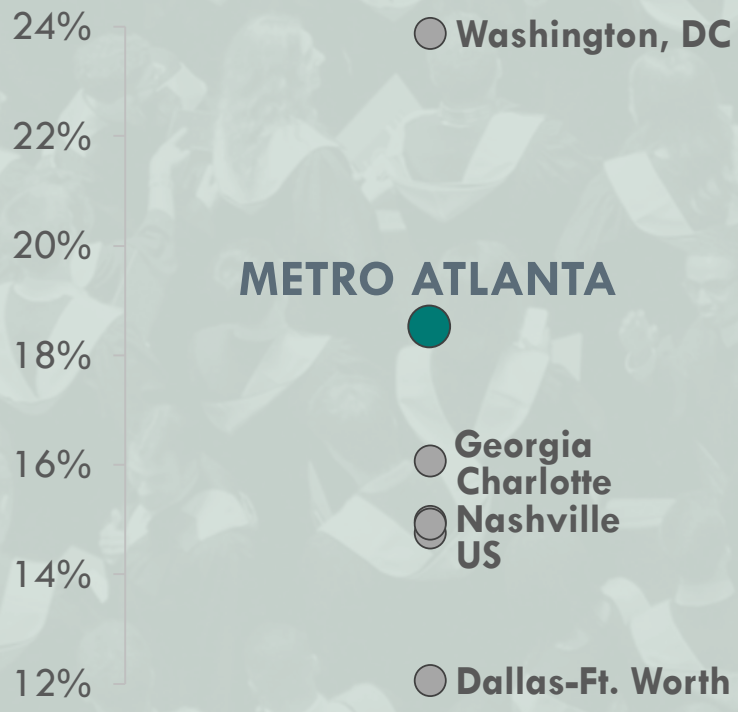
SOURCE: NATIONAL SCIENCE FOUNDATION / NATIONAL VENTURE CAPITAL ASSOCIATION; AVALANCHE CONSULTING

Minorities possess greater educational attainment than their peers in other regions.*

% OF BLACK/AFRICAN-AMERICANS W/ A BACHELOR'S DEGREE, 2015



% OF HISPANICS W/ A BACHELOR'S DEGREE, 2015



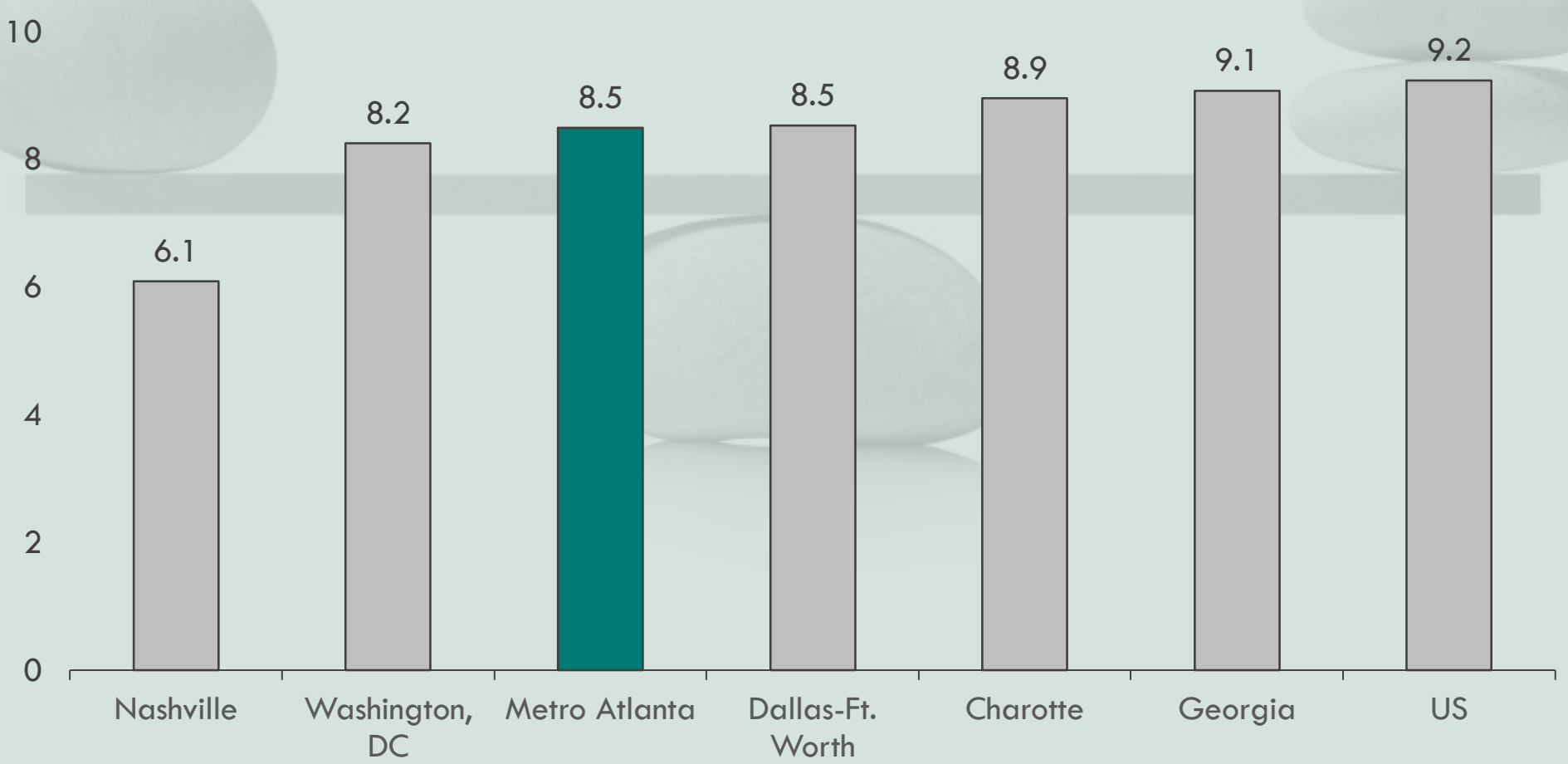
*though disparities in the educational attainment levels of individual racial and ethnic groups remain significant

CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

Compared to benchmark regions, Metro Atlanta is relatively equitable.

RATIO OF INCOME OF TOP 5% OF HOUSEHOLDS RELATIVE TO INCOME OF BOTTOM 20% OF HOUSEHOLDS, 2015



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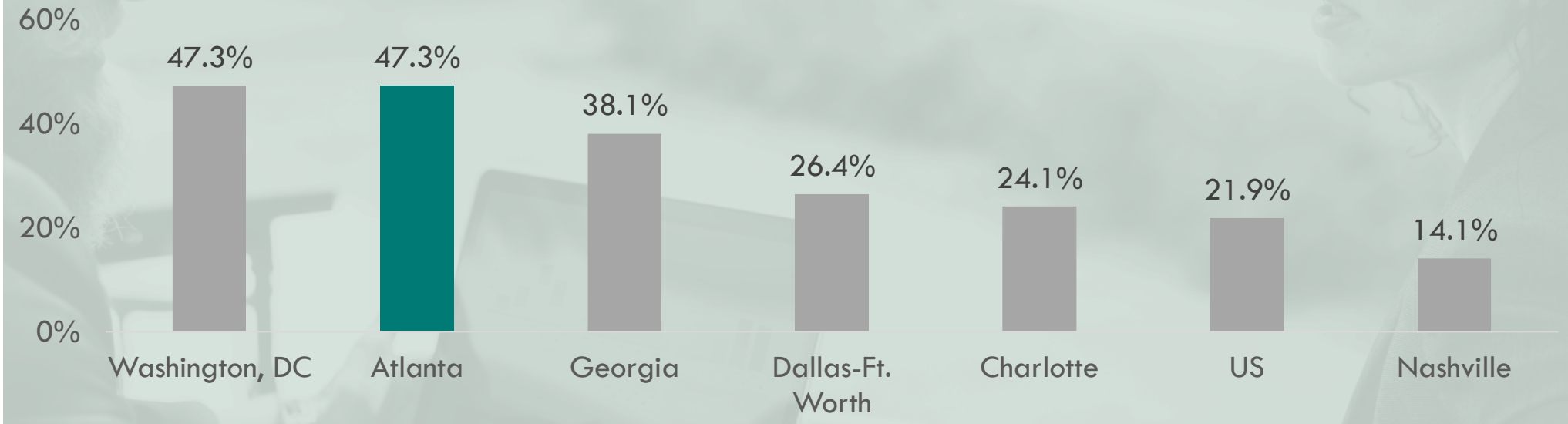
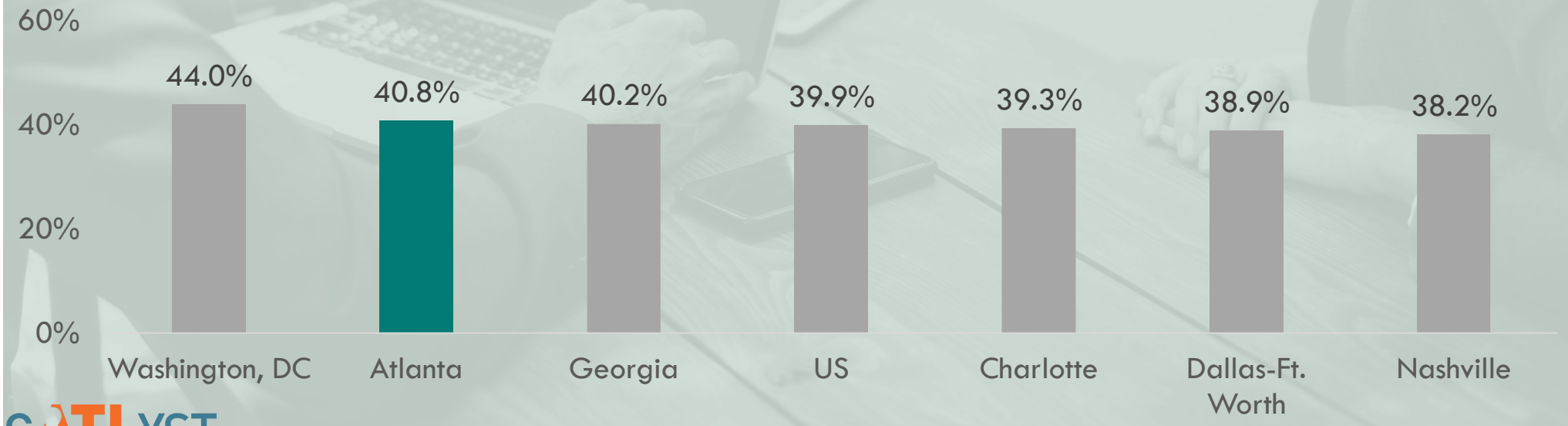
SOURCE: BUREAU OF LABOR STATISTICS; AVALANCHE CONSULTING

Greater leadership opportunities exist for women and minorities than in other regions.

% OF NON-WHITE WORKERS IN MANAGEMENT OCCUPATIONS, 2015



% OF FEMALE WORKERS IN MANAGEMENT OCCUPATIONS, 2015

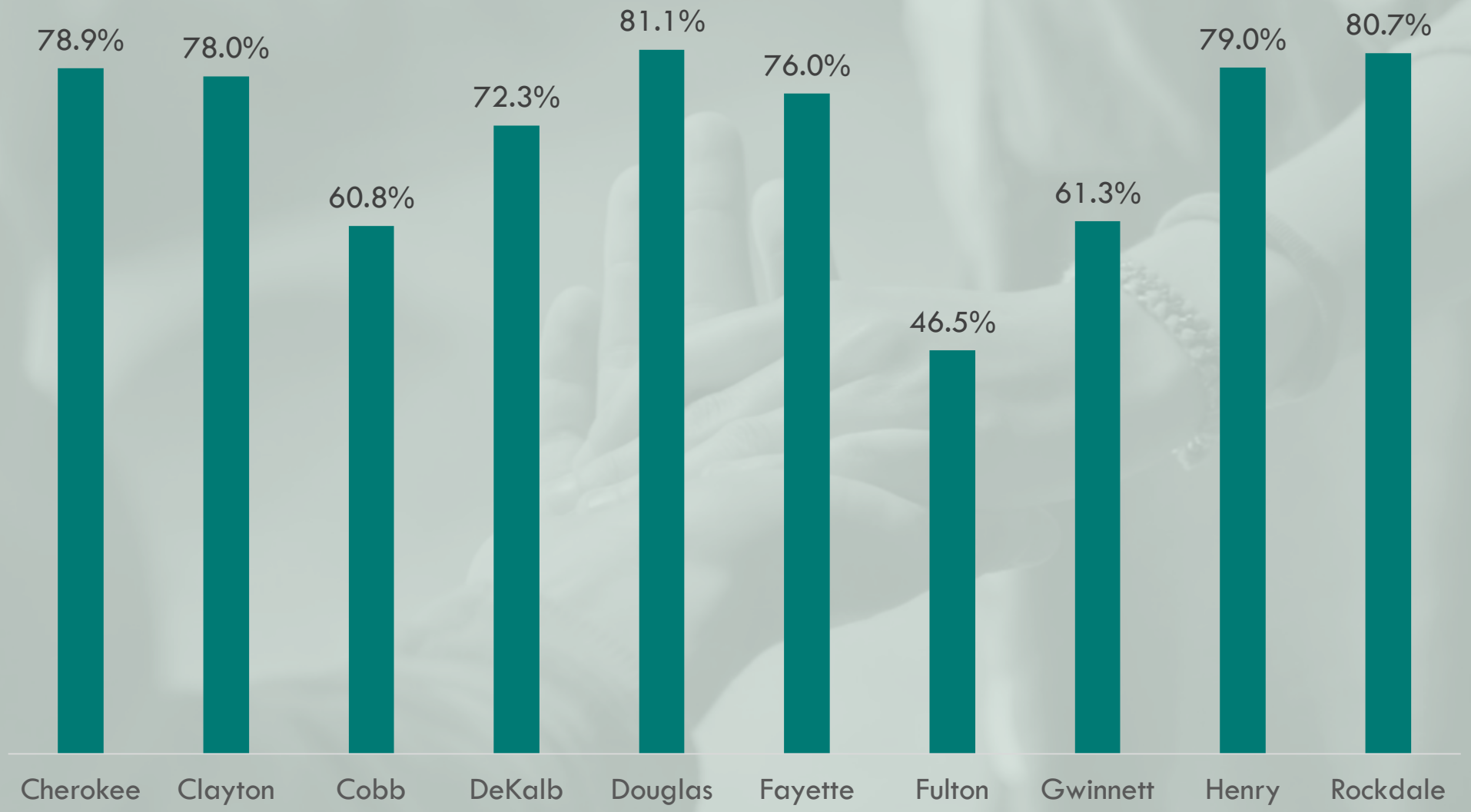


CATLYST

SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

The Metro is deeply interconnected.

SHARE OF RESIDENTS WORKING OUTSIDE THE COUNTY, 2014



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SOURCE: US CENSUS BUREAU; AVALANCHE CONSULTING

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CATLYST

Leadership

Global Business Environment

Public Policy

Livability

Economic development must think holistically and consider the interconnectivity between issues.

Talent & Education

Social Equity

Infrastructure & Mobility

Affordability

Entrepreneurship & Innovation

CATLYST

SOURCE: AVALANCHE CONSULTING

CATLYST

SOURCE: AVALANCHE CONSULTING

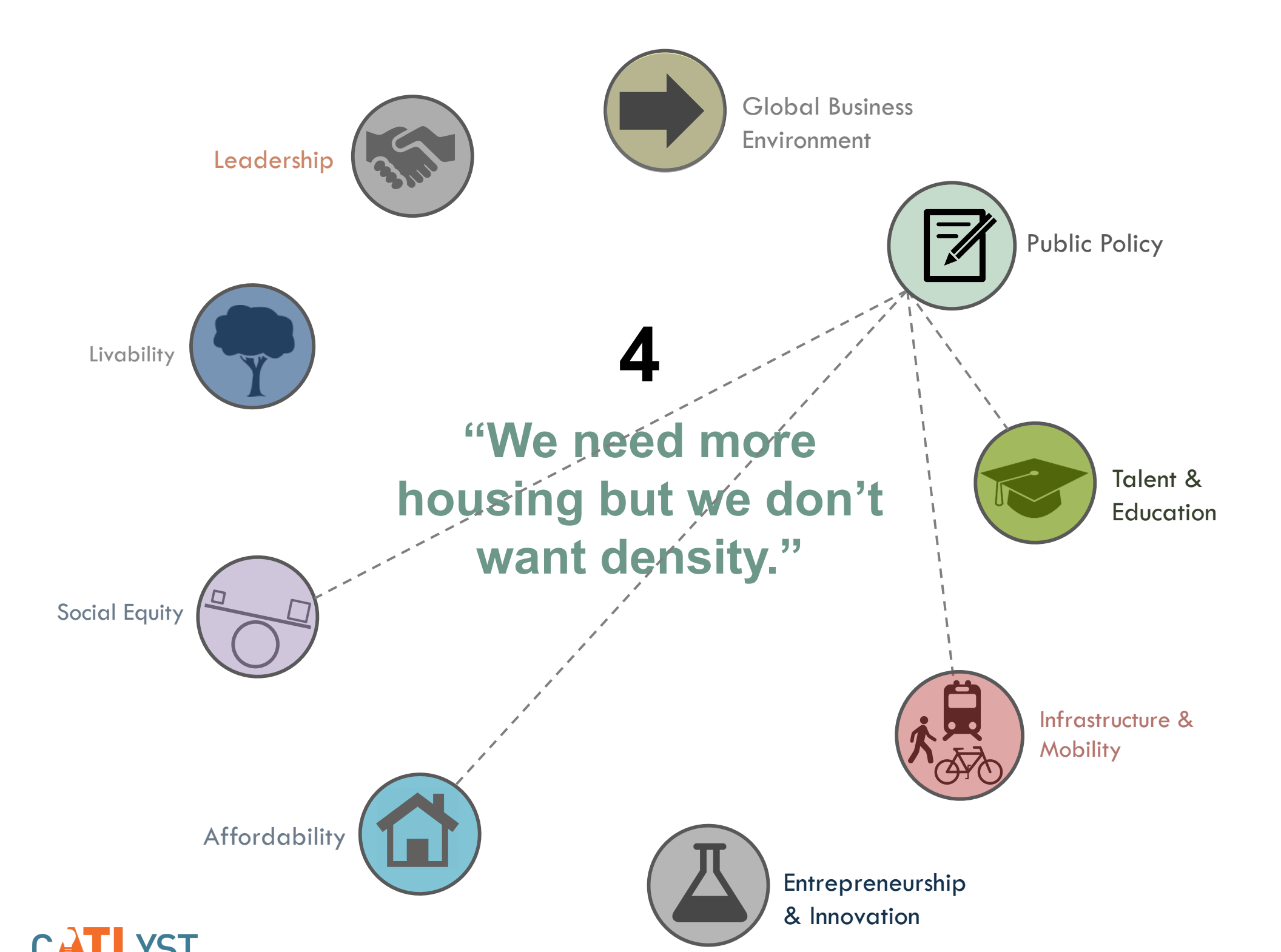
"Our infrastructure investments can't keep pace with our growth."

CATLYST

SOURCE: AVALANCHE CONSULTING

CATLYST

SOURCE: AVALANCHE CONSULTING



CATLYST

SOURCE: AVALANCHE CONSULTING

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SOURCE: AVALANCHE CONSULTING

Let's explore topics of competitiveness.

Take a few minutes to answer the worksheet questions on your own.

Specific to these topics…

- What are our region's 1-2 greatest challenges?
- How do these topics relate to each other?
- What topic must be included as a priority in CATLYST?

Now discuss as a group.

- Designate a scribe to document ideas.
- Try to reach consensus on the top 1-2 answers to each question.
- Combine your thoughts into a single handout.
- Share with the room.

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The CATLYST Strategy is forming!

This week:

- 3 Implementation Committee Joint Workshops
- 8 Topic-Specific Focus Groups
- Strategy Committee Meeting and Webinar
- ARC / Avalanche Internal Meetings

What's ahead?

Upcoming Visits and Strategy Committee Workshops

- July 11-12
- August 8-9
- September 6-7
- October 17, 18, or 19 (Roll Out)

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