

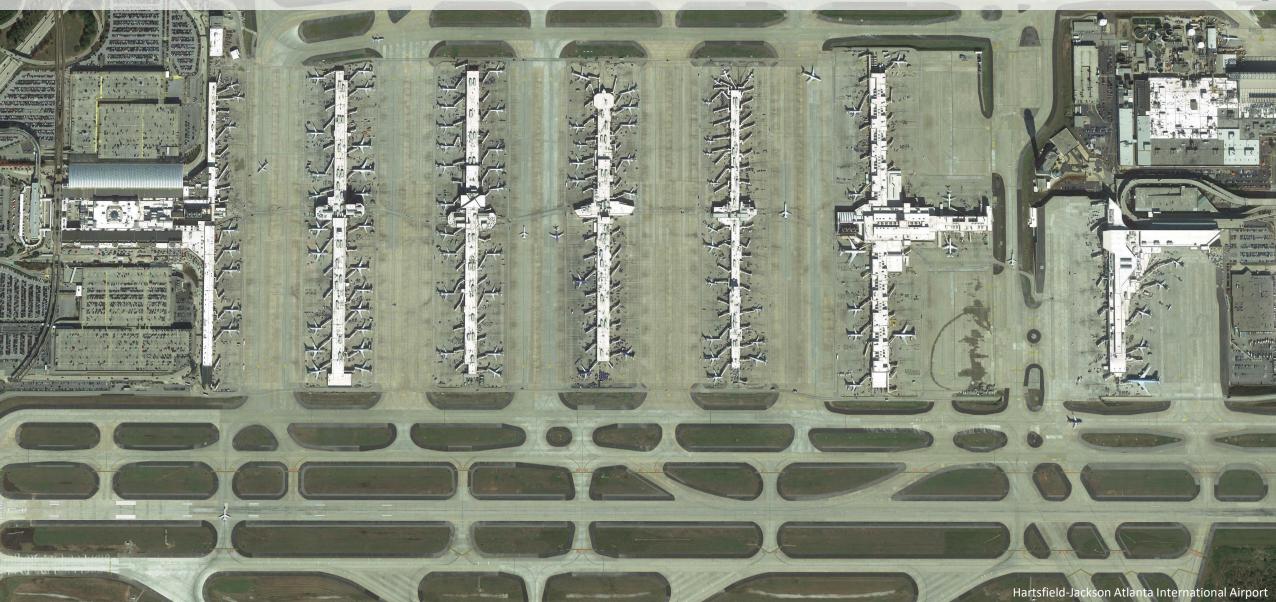
April 20, 2022

TODAY'S AGENDA

- 1. Welcome & Announcements
- 2. Introduction to Peer Review
- 3. Unified Growth Policy Map
- 5. Metro Atlanta Speaks
- 6. Comprehensive Economic Development Strategy

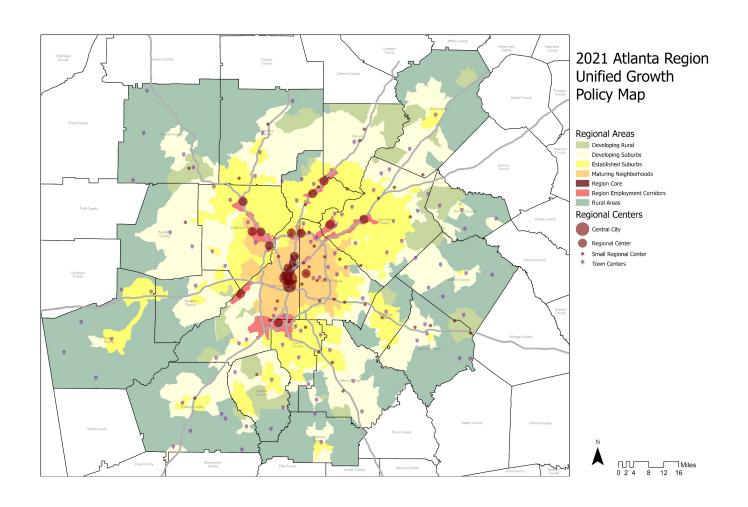
Unified Growth Policy Map Discussion





So what is the UGPM???

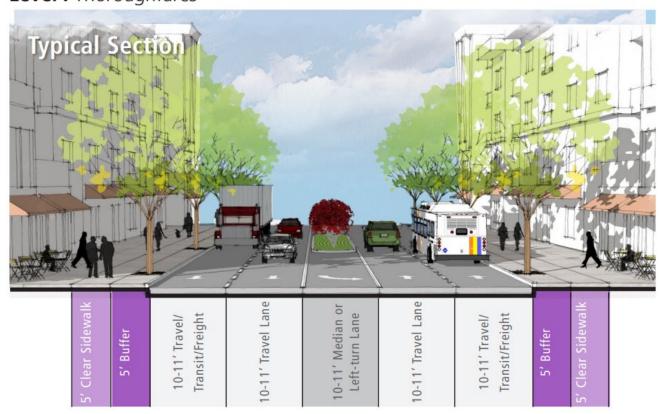
- Regional Growth Vision
 - Illustrates regional land use policy
 - Provides a spatial policy framework
 - Provides recommendations for forecasting



Uses of the UGPM

- DRI Determination
- Forecast development with Research and Analytics
- Roadway design recommendations
- Transportation project selection
- LCI Study selection
- Regional Housing Strategy

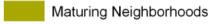
Urban Thoroughfare Design *Level I Thoroughfares*



Urban Areas



Regional Employment Corridors



Questions for Today

- Does the UGPM reflect the planning challenges of the Atlanta region?
- Should the UGPM be tied stronger to local plans or be a regional aspiration?
- How should ARC work to tie regional investments to the UGPM?

Mobility 2030 Forecast

Outcomes

- Growth Distributed Based on Available Land, Trends and Policy
- Many Jobs Proportionally Allocated with New Households
- Small Amount of Land Available in 2030
- Low Density Employment evenly Distributed













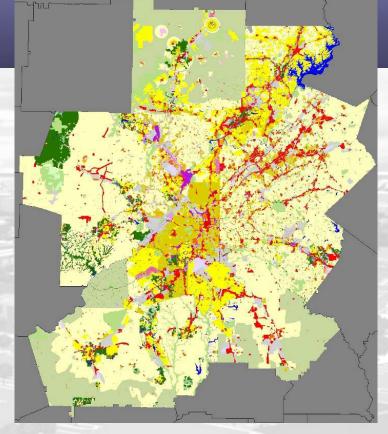




Compilation of Local Land Use (1998-2004)

Outcomes

- Similar Population Forecast as Mobility2030 and Many More Jobs
- Separates Jobs from Households
- Transit Share Decreases
- Delay 36% Higher than to Mobility 2030















LOCAL NEWS

Looking to the future: Traffic the top priority

In search of a regional cure

cooperate further if metro Atlanta truly is to address its traffic problem and maintain the area's quality of life, business leaders warm.

most valuable selling point quality of likely to rank traffic as the No. 1

gration and a lack of alternatives to



Atlanta Juarnal-Constitution saw these as spinoff effects of spearel and

far leadiers who can take up these lost on the business leaders, says A.J. Robinson, provident of Portrain Hold

assessing Atlasta's growth and say-ing, 'Look, we've got these problems

reverpone's quality of life, or does it have a chance of direleishing the quality of life?" Respondents with ties to the real

its vacated quality of life already ar-

Georgia Lagislature Environmental spences by reaffic. Expanding public transpos tation, which barrly registered last year, was fourth highest. Oriese, last Atterta Regional Corre

"Til live to pretend the items that rowed down the list ago better," said Jeffrey Susemweig, finance professor at Emery's Goiznata Business School. "But my some in they remained that and the others just moved abend in

ity problem, caused in large measure by automobile emissions, as being closely linked with truffic and insdecases public transportation. Thirteen quare public transportation. Thirteen restre counties currently are barred from spending federal moony on new road expunsions until there is a trans-portation plus that mosts emissions standards.

and expanding the public transit sys-tem would be a "very effective" way to "bulp ease metro Atlanta's traffic problems," twice the marsher who

problems, hence the nearbor who carded additional haplway development. An overwhelming majority, 10 percent, and judicial transportation should be expanded beyond what is currently pleased. As the owner of an automobile depending, Dorrif of Regards number Jametin Barmon has a state in the cardonne, but the seal the overtical gence of automobiles directionally gence of automobiles directional agence of automobiles directional and the secondary.

yea/ne not in a car, you've not sup-posed to be there." Baranco said. "We need sidewalks and bikerways. You deed enercise as part of your every-day life, not just by going to a gyrs. If I felt safe, I could walk to the store or ride my title. We can do these things

cide on their. We can do these things and still yet cares, restinct chair . Rear 'Co' 'Seison, restinct chair . Rear 'Co' 'Seison, restinct of the restinct . Rear 'Co' 'Seison, restinct of the consense of this ferrour . Next taked complexyment grow from 1.5 to head parameter in Smooth Spierugs. He manutes some openang the US' basedparature in Smooth Spierugs. He was not some openang the Constitution of the disection of Constitutions, group service, pages and Scottanasson, group searching 1-5%. In soal, "The people service is paged to the disection of Constitution group, group searching 1-5%," In soal, "The people service openant service openant service . The people service . The service openant service . The service . The service . The service openant service . The service .

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"The definition of Transports to many and the con
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"The control of the con
"The con-

Tom Weywalt, director of Research Atlanta, and the impotes for change will come from the grass-costs level.

sound quot west as a practice, as a fault a creating a new political divisions. It is not a life predicted that they will have an averagingly record factor, collision as best and approximation of ficials approved better. Eached officials approved better. Eached officials approved better to these groups. "There's a risk that if we don't get a handle on growth, the traffer may make people and practice. Thomey's Risensouring said. That could lead to recommend the archivals and will.

could push for the nocated returns, just as it railled behind the Olympic Biggins said. But such a mevement needs its equivalent of Billy Payne, she added. With more than 70 local govern-

ments in the ABC's 10 counties, it would be a tall order to look for a local elected official to take the less Some respondents put their hopes on the next governor, while offices are looking for Atlanto's business leader-

cists and say they are the reason. It is the citizens. We put them into office. We prop them up every day:

change in that reportantion.
"The ARC is not a governing body;
it is a recommending body," he said.
"I see it is functioning just like it is

ingposed in."
Does the ARC need teeth? "I don't think it needs to," Hill said, adding that he thinks regional cooperation is

increasing
Kelly Low, director of Gustanett
Council for Quality Growth, agreed,
saying all that's needed is to allow
counting institutions time to work

sund. It takes 10 to 22 years in get consideraction together and build a plan and get finding in get a train or has not them:

But many respondents believe the regions describ have that long before gradied; nature the long before gradied; nature the long before gradied; nature the long to fire and "We need to get in first of the mone," hobesses said. "We can't want."



Het property: Mistro Atlanta leaders say that communities like Laurel Springs in Forsyth County will continue to be the region's real estate frontier

'Sprawl' still real estate

Despite all the talk about truffic

Desgiss off the title show traffic-and dray air, mirror Alinata hashers, and an an estate it to be on appeal, the traffic and the state of the analysis of the state of the state of the land speculation. Persyst and Clesto-man Landwriting Parid 150 grower, ment Landwriting 100 of 150 growers, and DeSalah district searching, and DeSalah district searching, and DeSalah district searching, and DeSalah district path to line from the state of 150 growers of 150 growers.

metro Affanta are air pollution and truffic — both follows from sprawl that has left area residents with the longest average commutes in the

side the Perinance Foreign was often-ome Openional, 12 januared, Hong, 18 demonst. 13 januared, Hong, 18 demonstration of the Committee of the Control of the Committee of the Committee Control of the Committee of the Committee Control of the Committee of the Committee of the Perinan temporary for load of the Committee Perinand Committee of the Committee of the Wayne HIL, Chairman of Ories-netts Committee of the Committee of the Wayne HIL, Chairman of Ories-ters's Committee of the Committee of the Wayne HIL, Chairman of Ories-netts Committee of the Committee of the ware gardeling for world from paid ware provided to the Committee of the ware gardeling for world from paid and to Actions, Oncome and Rever-cements of the Committee of the ware provided to the Committee of the HIL Actions. The committee of the HIL Actions the HIL Acti We want [to have] our cale and out it, too," says Heary "Budge" Juraison, chairman of Juraison Rescurch, which provides data to the development industry. "The sprawl is ne issue, but it creates tremendous apportunity for everybody in Atlan-

big profit potential shows no sign of

interesting," even as demand increases for property in Mickews and downtown, and flob Bayel, who heads the custo Atlanta office of Grabb & Ella, a contemporal real states firm. "Everybody has come to

Service Service	Governmen
Trash pickup Government manages better 876- Business manages better 80%	16% 77%
Hospitals Government manages better 7% 8.6/ress manages better 85%	14% 34%
Water and sewer Government manages better 20% Subress manages better 74%	31% 35%
Prisons Government manages better 33% Business manages better 35%	47% 15%
Hartsfield Airport Government manages better 39% Suiness manages better 51%	47% 30%
MARTA Government manages better 46% Business manages better 46%	47% 37%
Toll roads/bridges Government manages beeser 40% Business manages beeser 40%	47% 30%
Schools Government manages better 47% Business manages better 42%	77% 9%

TOOLS OF THE TRADE Nearly half of metro leads Local poning ordinances

	1998	1997
Arquity	24%	696
Public schools	21%	24%
Traffe	17%	2%
Public transportation	11%	2%
Crime	256	33%
Downsown	8%	1196
Race relations	5%	5%
Something also	4%	11%
No opinon	2%	-

ajc.com

- by the Spraw? series are Friday. It examines the role our driving and other habits play in metro Adlenta's air quality. It starts as 9 p.m. on GPTV/Channel B. Aff. reporters Lucy Soto and David Goldberg will lead the discussion. It will be rebroadcast at 10 a.m. May 24.

WHO'S IN CONTROL?

Here is the percentage of poll respondents who rated these groups as very influential in the development process:

Ga. Department of Transportation	65%
Land development companies	60%
County governments	43%
Industry & business associations	34%
Georgia Legislature	2796
Atlanta news media	24%
Environmental agencies	23%
Georgia Department of Industry,	
Trade and Tourism	22%
Atlanta Regional Commission	1696
Homeowners association	1196

Source: Journal-Constitution poll of 197 metro Atlanta business and political leaders conducted March 5 -April 29 by the Marketing Workshop.

Local Aspirations

Outcomes

- Reflects Diverse Vision of Local Leaders
- Preserves Forecasted Growth at the County Level
- Locates Higher Density Residential Close to Jobs Along Corridors and In Centers
- Higher Percentage Housing Accessible to Transit
- More Rural Land and Greenspace
- Less Low Density Housing Construction









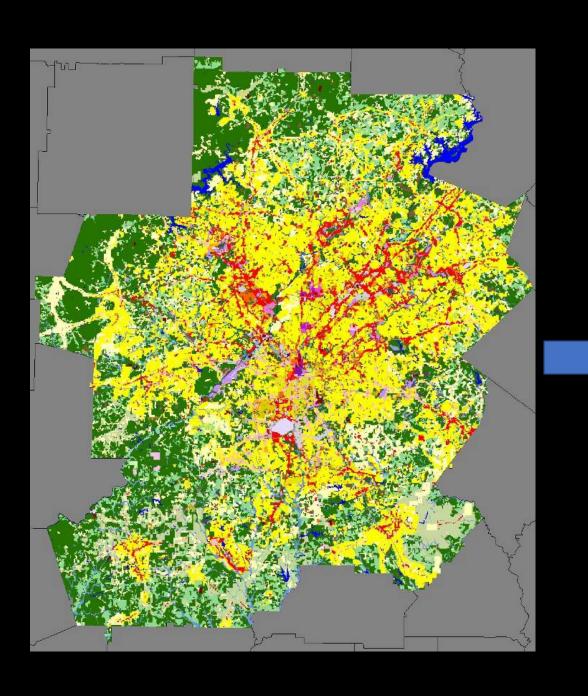


Delay

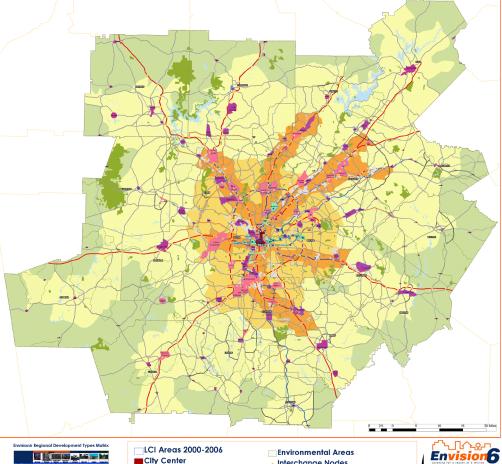
Imperviousness







Atlanta Region Unified Growth Policy Map



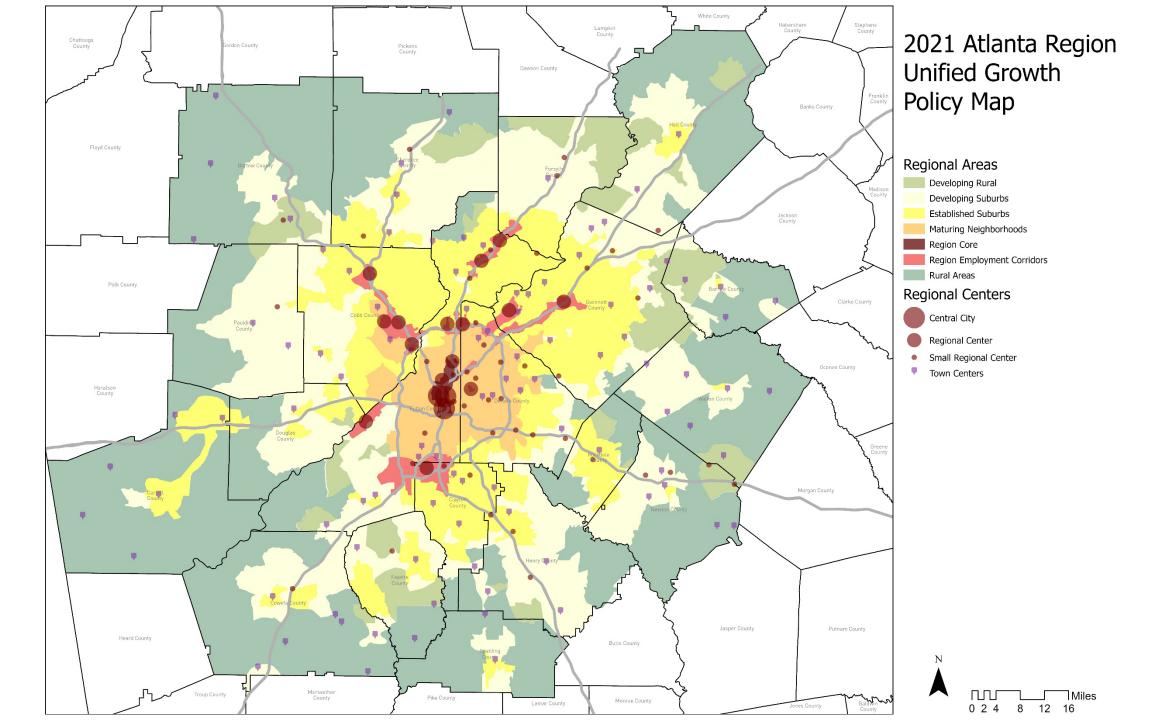


- City Center

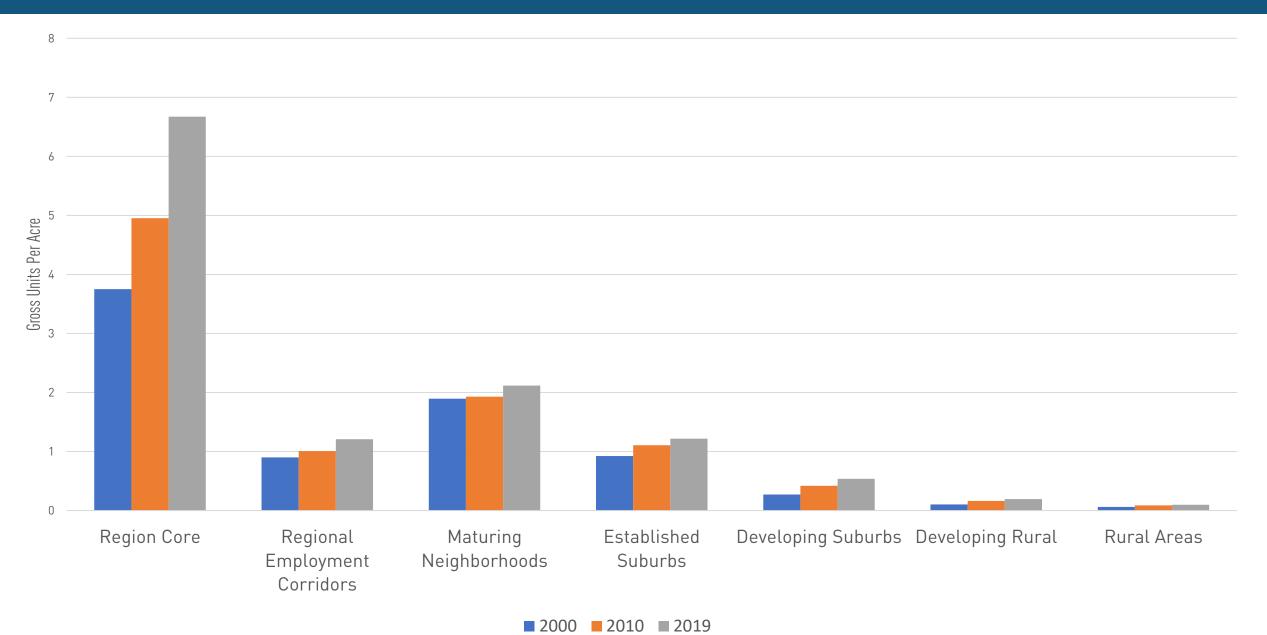
- Station Communities
- Urban Redevelopment Corridors
- Freight Corridors
- Regional Parks
- Mega Corridors
- Urban Neighborhoods
- Suburban Neighborhoods
- Rural Areas

- Interchange Nodes
- Future Transit Stops
- Regional Transportation Strategic System
- —Interstates & Ltd Access Facilities
- Regional Strategic Facilities
 High Capacity Regional Transit
- —Strategic New Alignments
- Stream/River
- Regional Water Resources

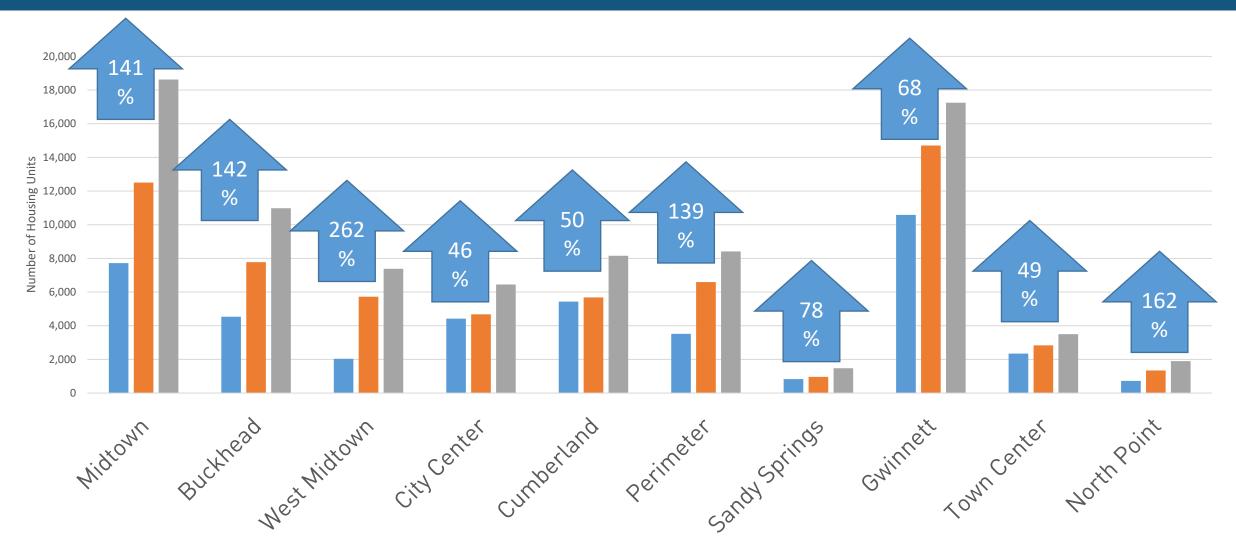




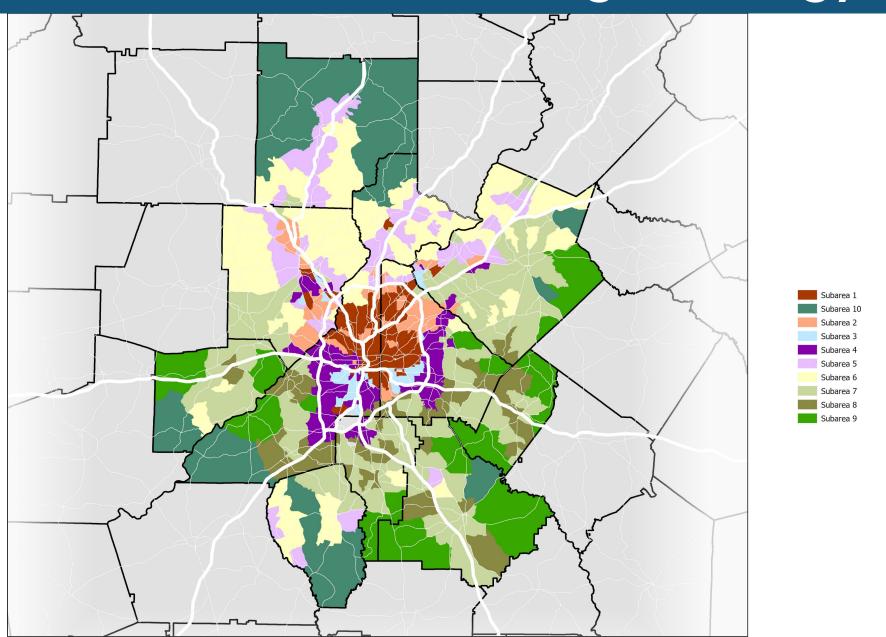
Residential Density by UGPM Area Type



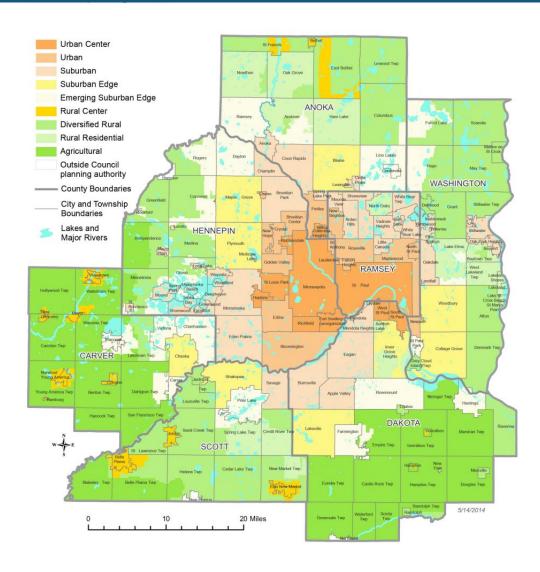
Activity Center Density Change



Metro Atlanta Housing Strategy

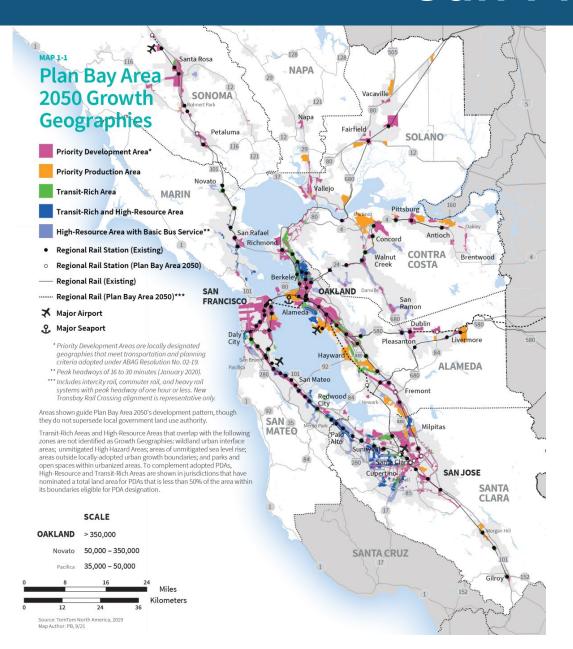


Minneapolis



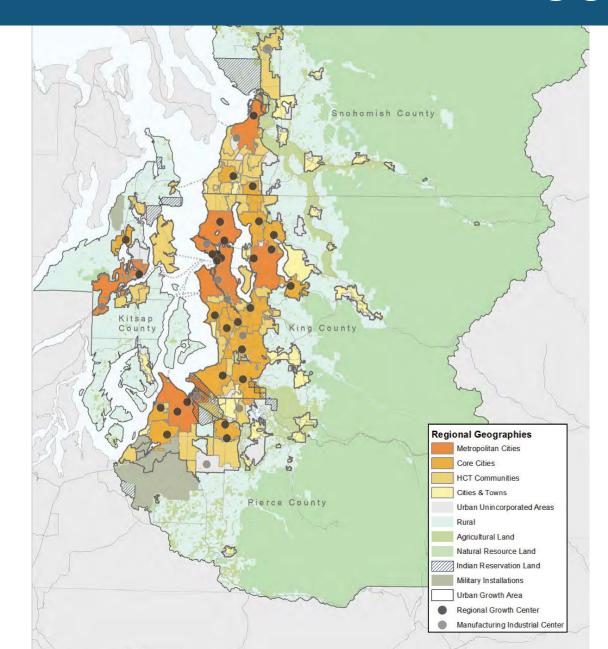
 Each local plan must identify what community classification and density standards from the regional plan

San Francisco



Local Governments nominate
 Priority Development Areas
 that meet criteria about future
 growth planning, and those
 areas are eligible for funds

Seattle



- Detailed certification process similar to the Local Implementation Standards from The Atlanta Region's Plan
- Plan is updated before all Comprehensive Plan Cycle

Questions for Today

- Does the UGPM reflect the planning challenges of the Atlanta region?
- Should the UGPM be tied stronger to local plans or be a regional aspiration?
- How should ARC work to tie regional investments to the UGPM?



A LUCC (Not-That-Long) Look 2021 MAS Results

Jim Skinner, Research & Analytics, Center for Livable Communities, ARC jskinner@atlantaregional.org







Genesis, Goals, Methods

- Origin was 2013 LINK Trip to Houston (now in 10th year)
- Goals: Assess Perceptions, Gauge Opinions, Define Priorities
 - Demographic Crosstabs Critical
- Method 2013-2019: Random digit dial (RDD) sample survey of residents in the Atlanta Region
 - Added subarea-level significance in 2014
 - Added cell phone segment in 2015
 - 5,200 surveyed in 2019
- New 2020-21 Method: Mixed-Mode
 - 2021: RDD of 2,700 respondents (targeted); online panel of 2,100 (targeted)
 - 11 counties and City of Atlanta
- 2021 Focus: Pandemic Impacts and Equity
- 2021 Sponsors:









What We Asked....(2021)

Recurring questions, from prior years

Biggest Problem of the Region

The Future: Better, Worse, Same?

Handling a \$400 Emergency

Assistance from a Food Bank?

Comfort Paying Mortgage

Racial Equity questions

Discrimination against Blacks is a serious problem" ranking

Police Response Options

Relative Wealth of Blacks v. White Racial Equity importance ranking

Economic/ Workforce Equity questions

Economic Equity importance ranking

Increase Minimum Wage

Extent of Working at Home in Pandemic
Preferred Method to Improve Workforce

COVID-19 specific questions (New and Old)

Vaccination Status
Comfort Level with Normal Activity (relative safety)

Cross-Tabs include:

County, Gender, Race, Age, Ethnicity, Income, Kids or Not, Owner/Renter







2021 Highlights

Crime was top of mind...everywhere and for (almost) everyone

Economic Equity: Some positive signs, and propping (from stimulus), but pressures in some areas

Racial Equity: Is the window for change opening or closing?

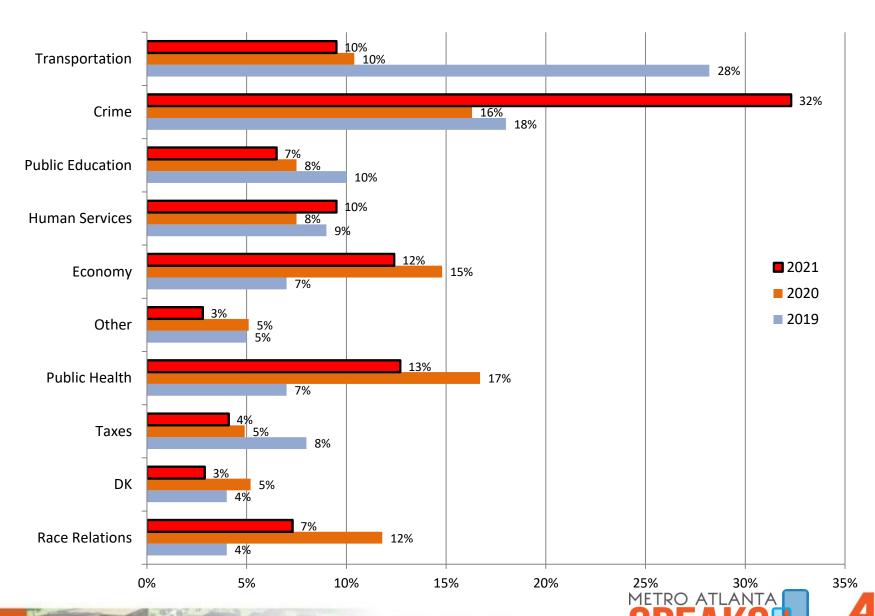
Results suggest either trend is possible

The pandemic's presence and past impact clouded beliefs about the future



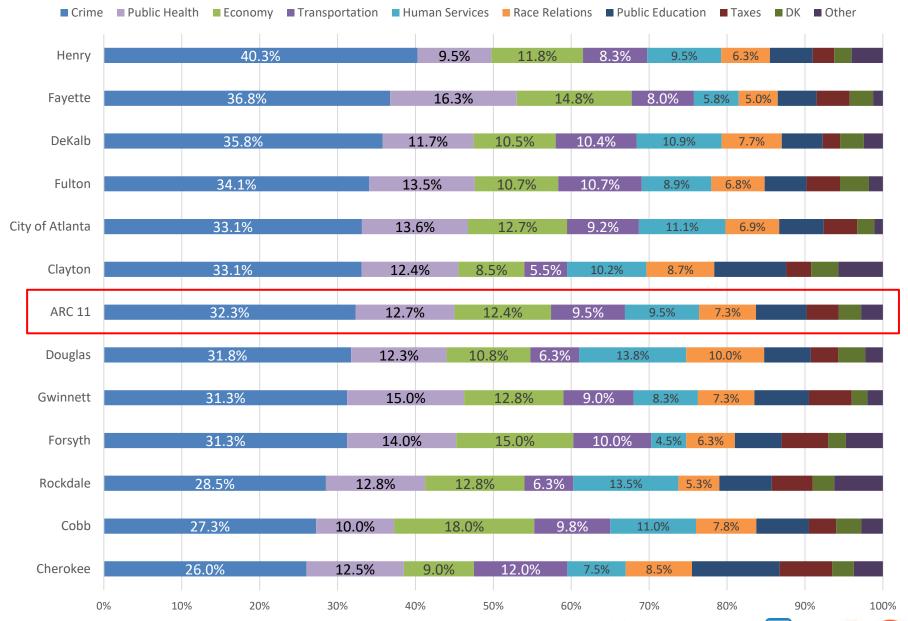


The Biggest Problem?: The Last Few Years



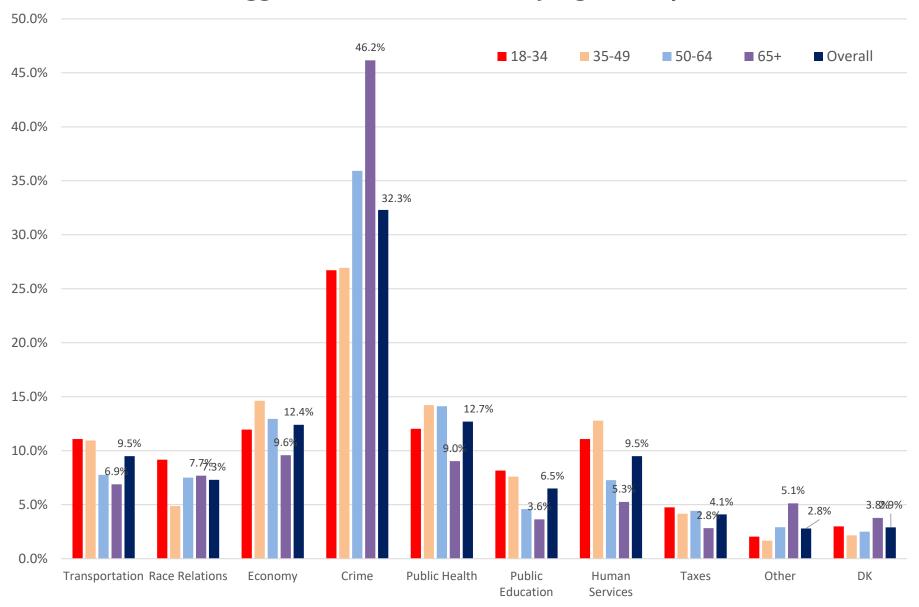
regional impact + local relevance

The Biggest Problem?: 2021 by County





The Biggest Problem?: 2021 by Age Group







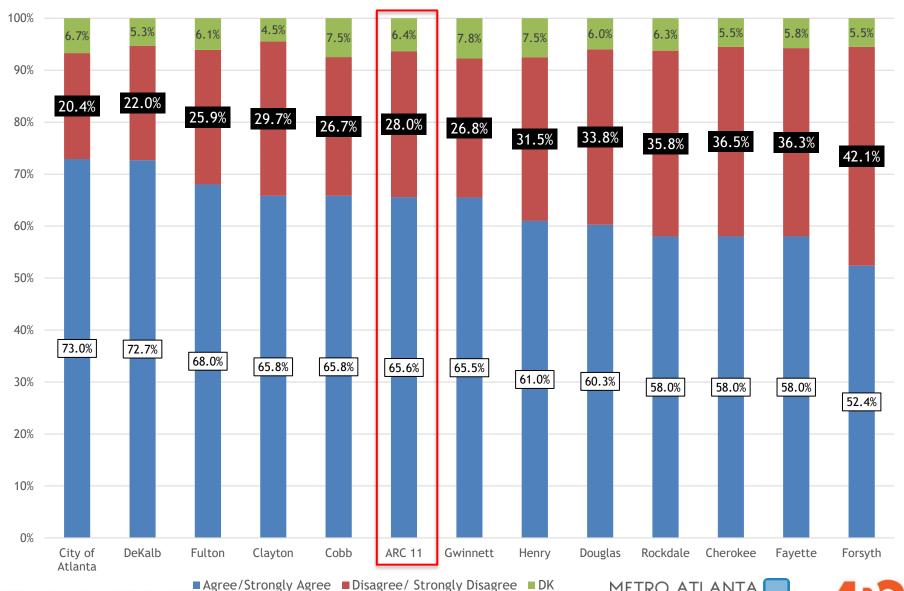
Equity and Economy







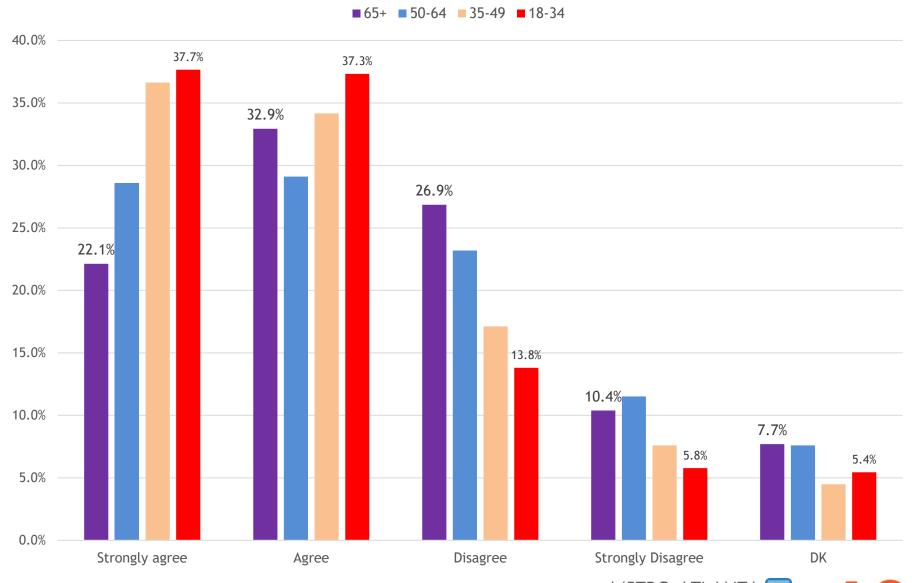
"High levels of income inequality have a negative impact on the economy" by Area 2021



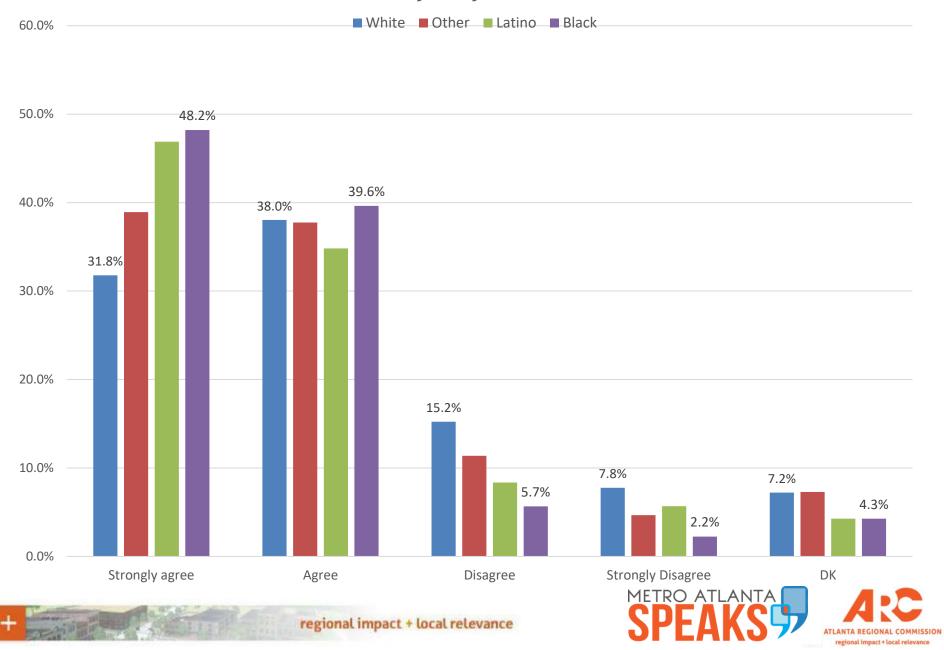




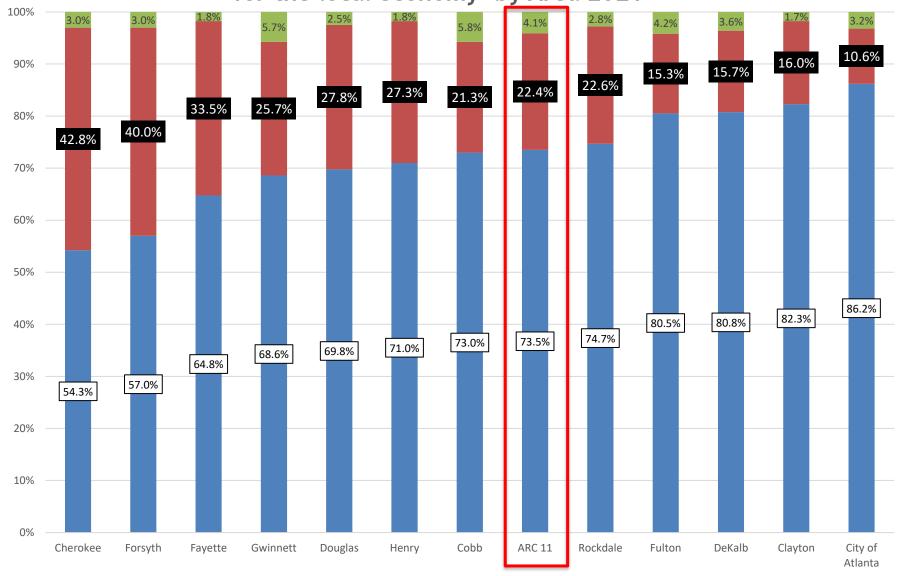
"High levels of income inequality have a negative impact on the economy" by Age 2021



"High levels of income inequality have a negative impact on the economy" by Race 2021



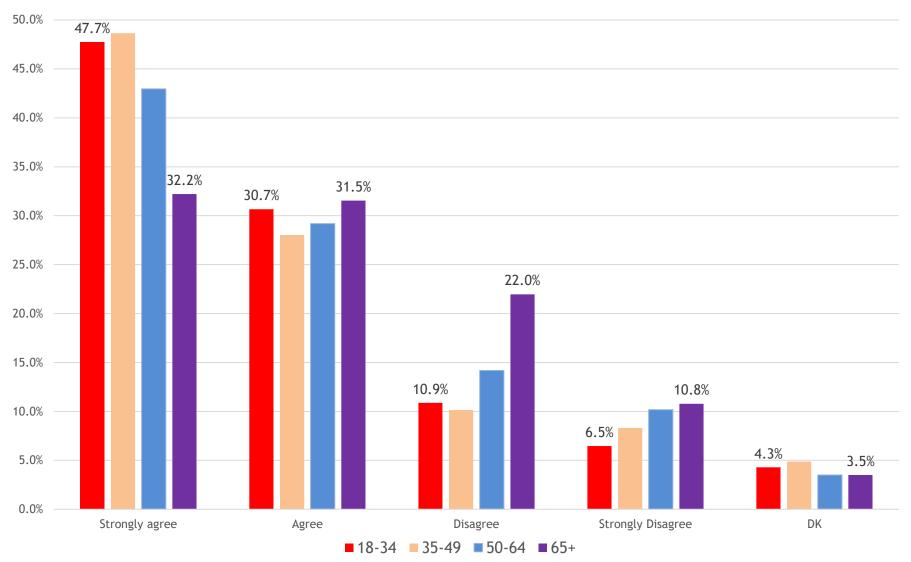
"Increasing the minimum wage would be good for the local economy" by Area 2021







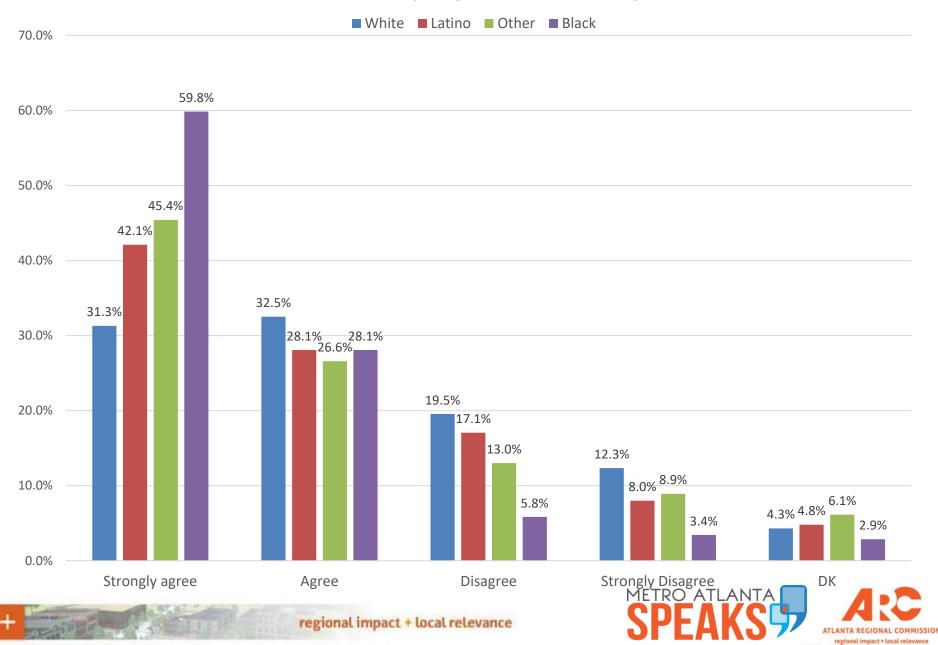
"Increasing the minimum wage would be good for the local economy" by Age 2021



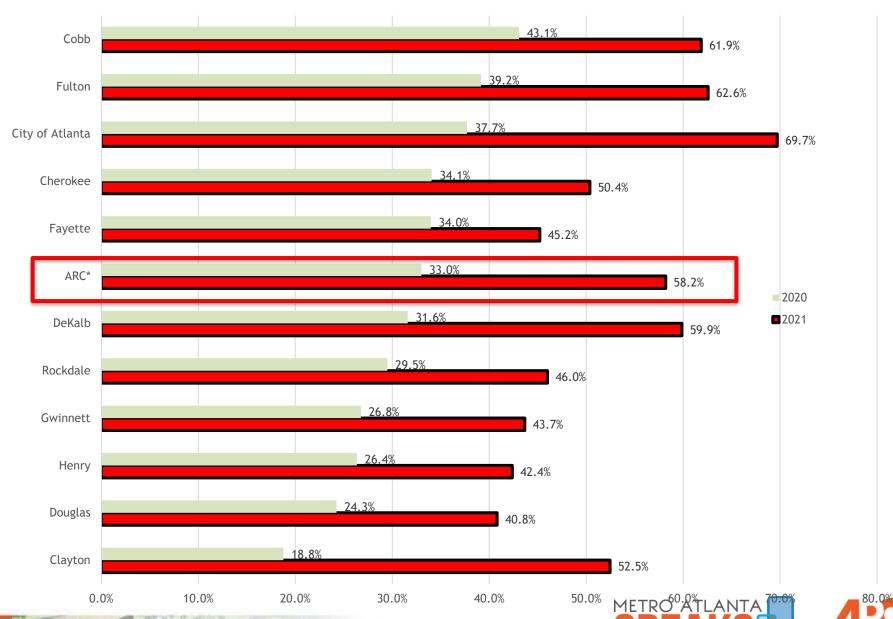




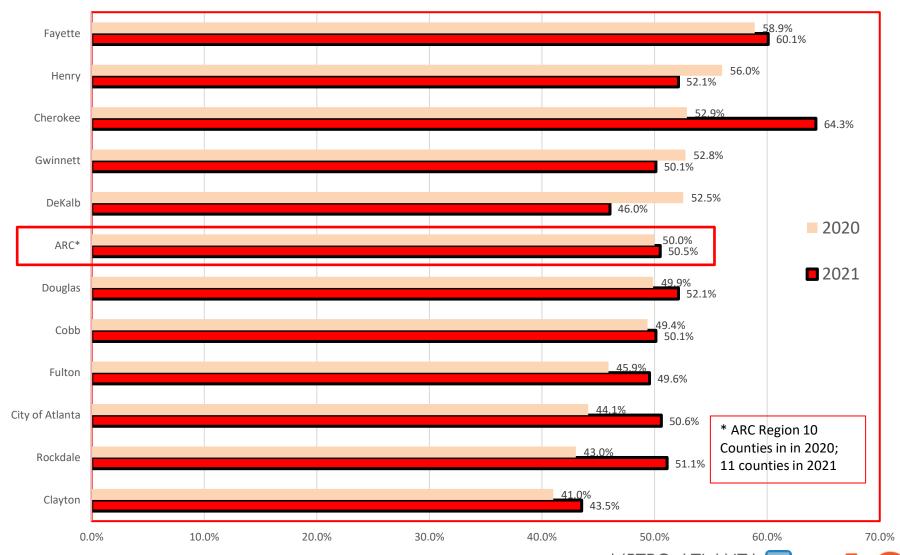
"Increasing the minimum wage would be good for the local economy" by Race/ Ethnicity 2021



Teleworking (Remote Occasionally or More) 2020 and 2021:

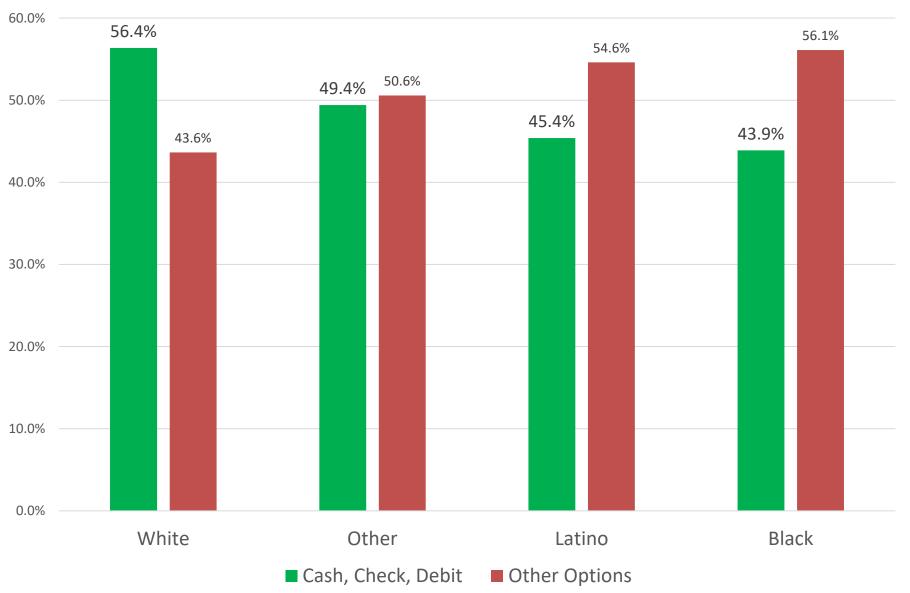


Could Pay for a \$400 Emergency with Cash/ Debit... Comparing 2021 to 2020





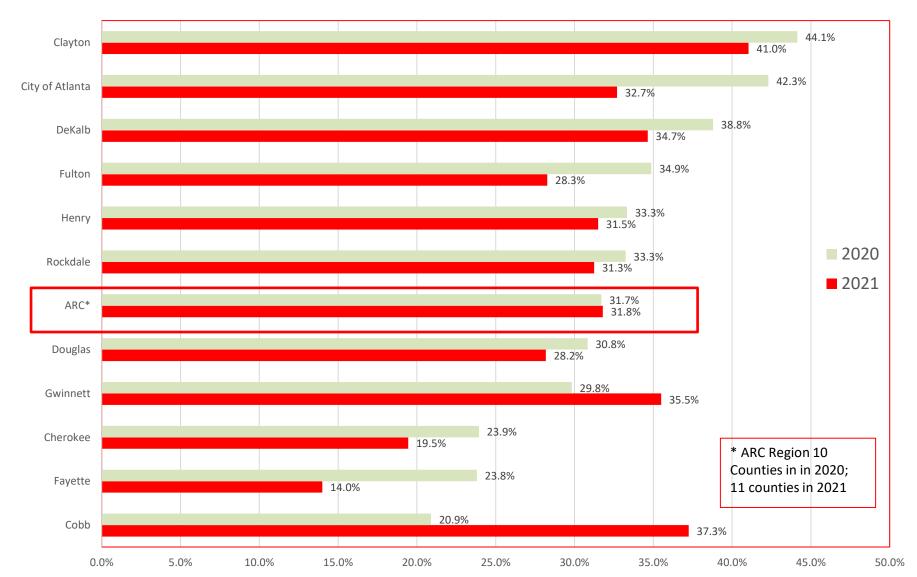
Could Pay for a \$400 Emergency with...by Race/Ethnicity: 2021







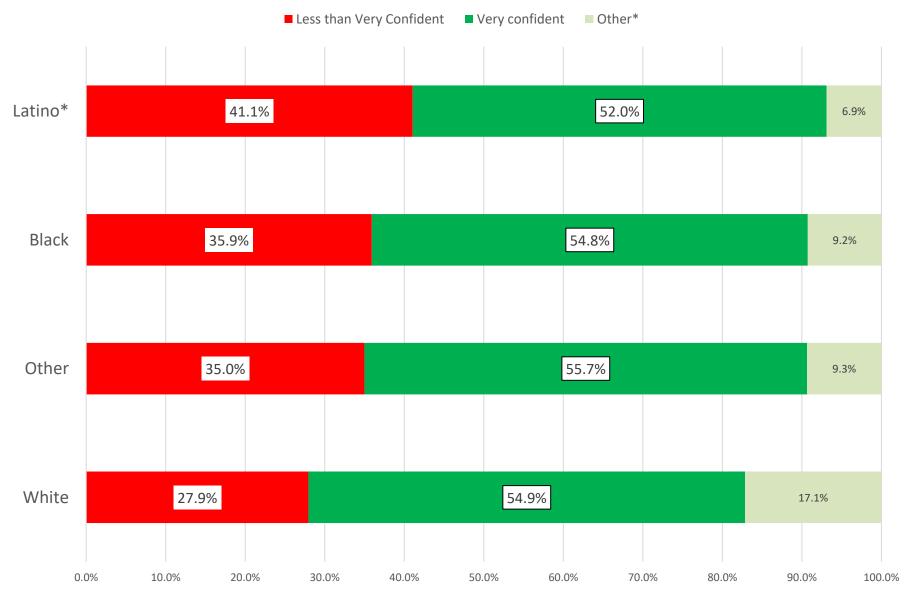
Share Less Than Confident in Ability to Pay Next Mortgage or Rent Payment...2020 and 2021







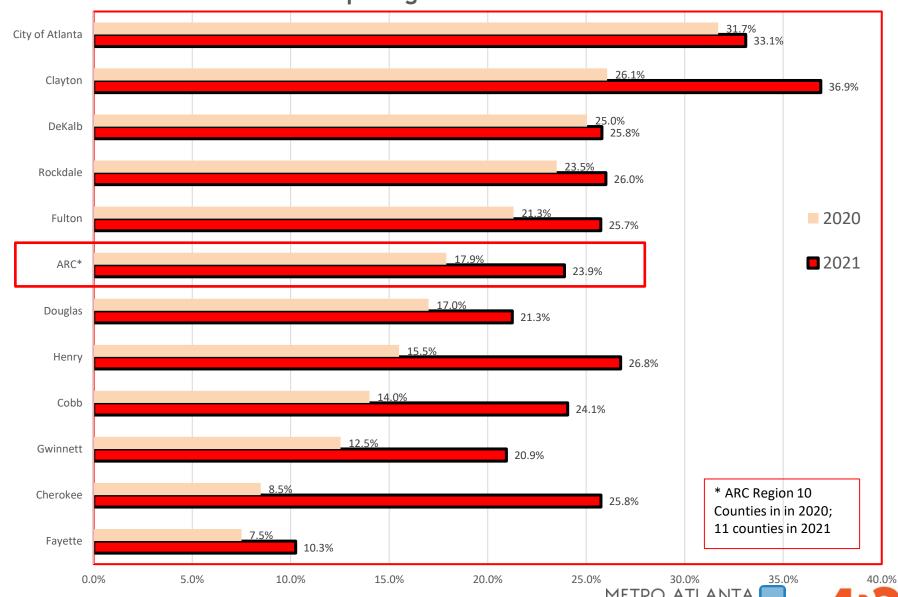
Confidence in Ability to Pay Mortgage or Rent...By Race/ Ethnicity: 2021



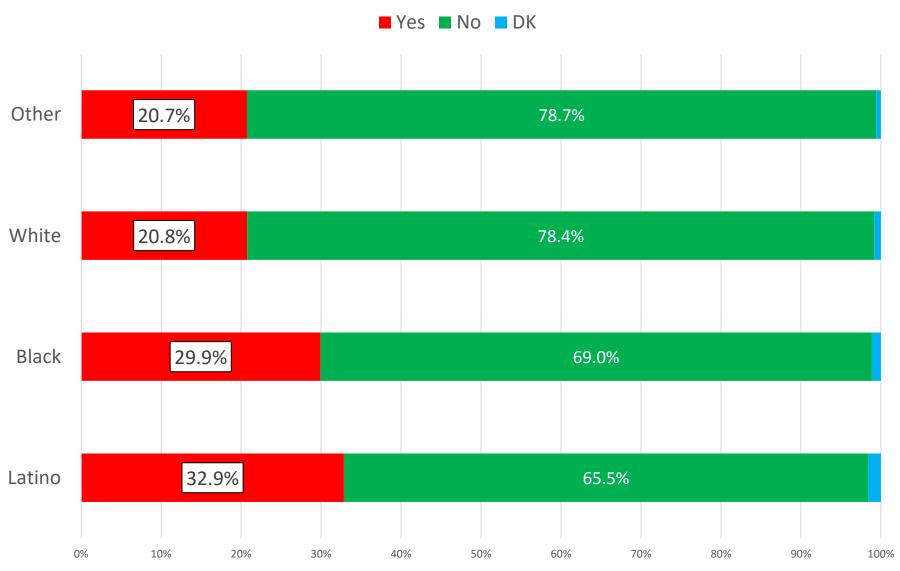




Received Food from a Food Bank: Comparing 2020 and 2021



Received Food from a Food Bank: By Race/ Ethnicity, 2021







Question: For All Respondents...

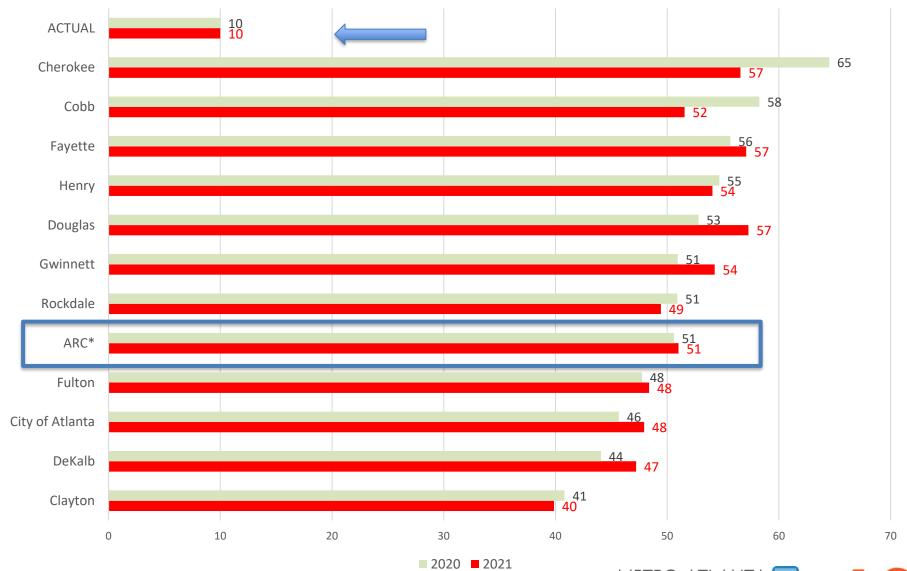
If a typical white family in the United States has 100 units of overall wealth, how many units of overall wealth does the typical Black family have?

(INTERVIEWER: Code number of units 0 - 100. DK/NA = 999)



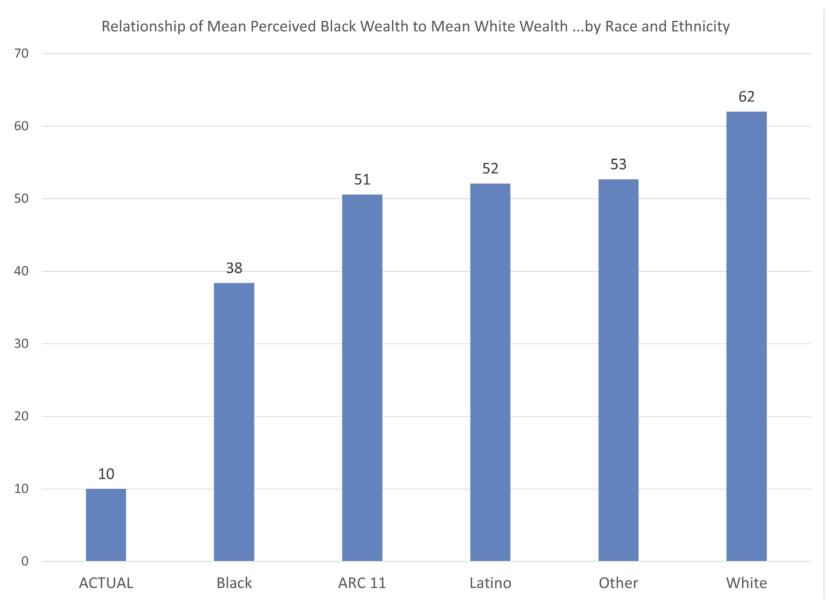


Ratio of Black Wealth to White Wealth Comparing 2020 and 2021 MAS Responses





Ratio of Black Wealth to White Wealth, By Race













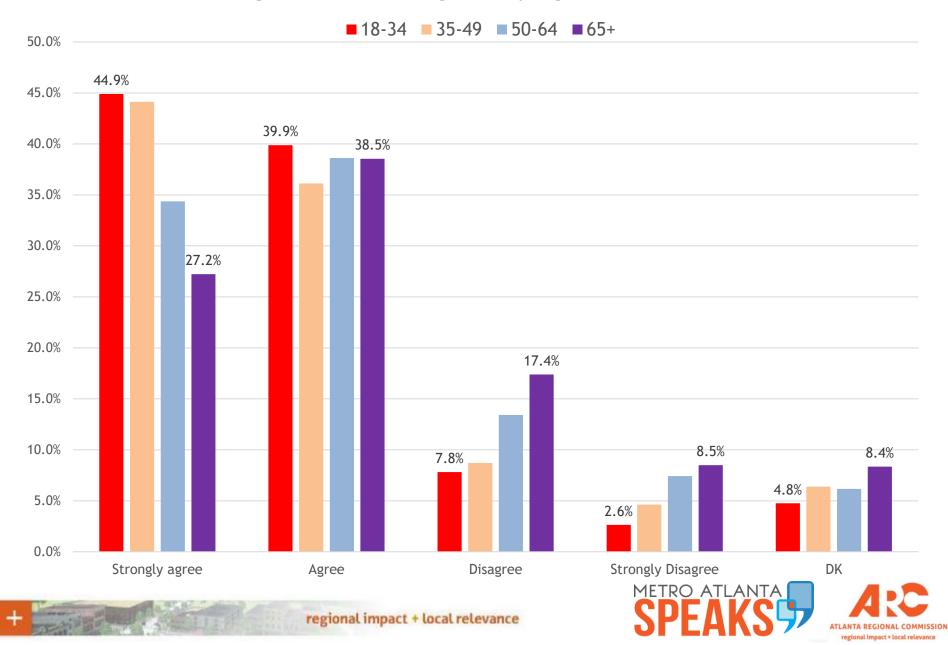
"Ensuring racial equity is essential to maximizing economic growth in our region" by Area: 2021



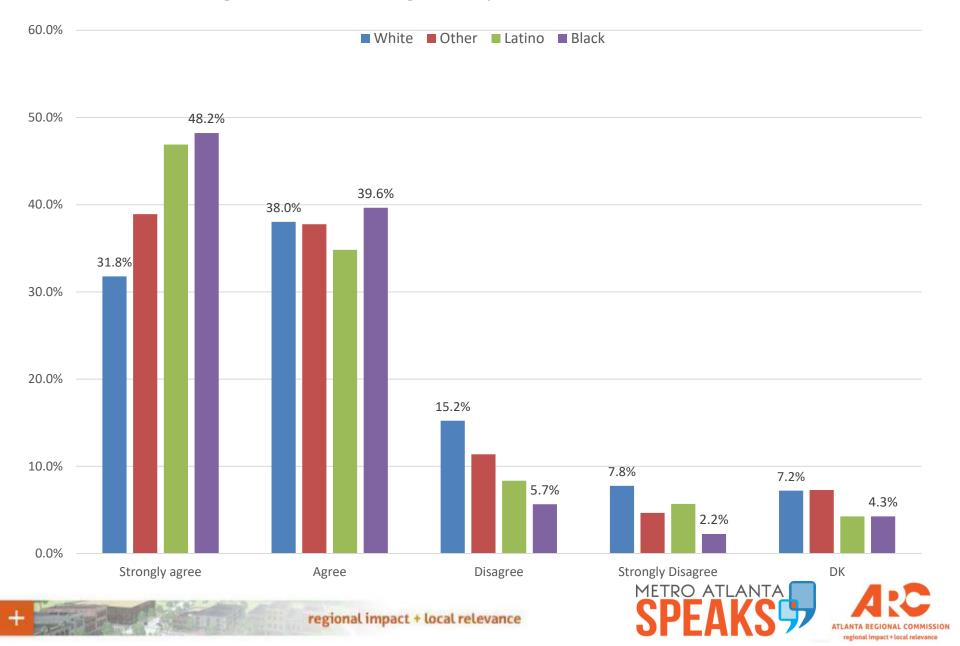




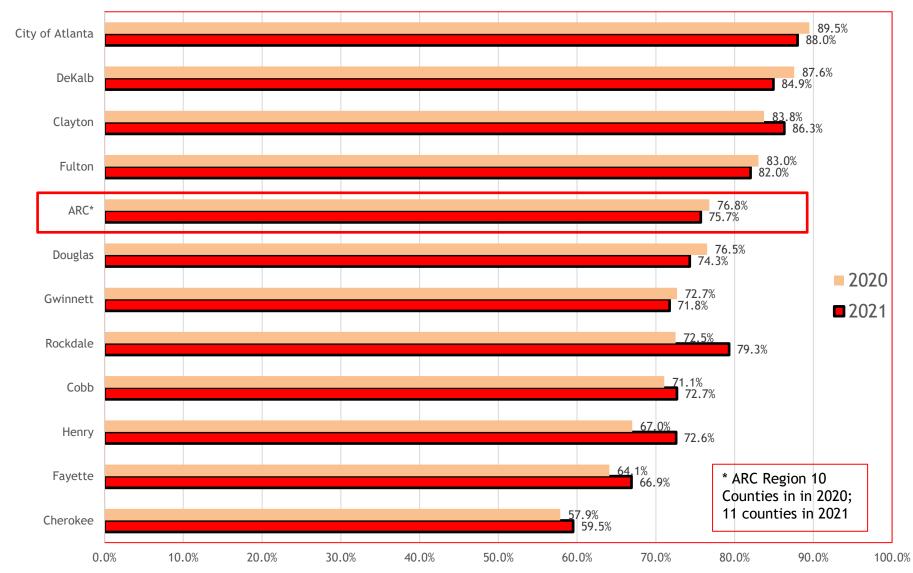
"Ensuring racial equity is essential to maximizing economic growth in our region" by Age: 2021



"Ensuring racial equity is essential to maximizing economic growth in our region" by Race/ Eth: 2021

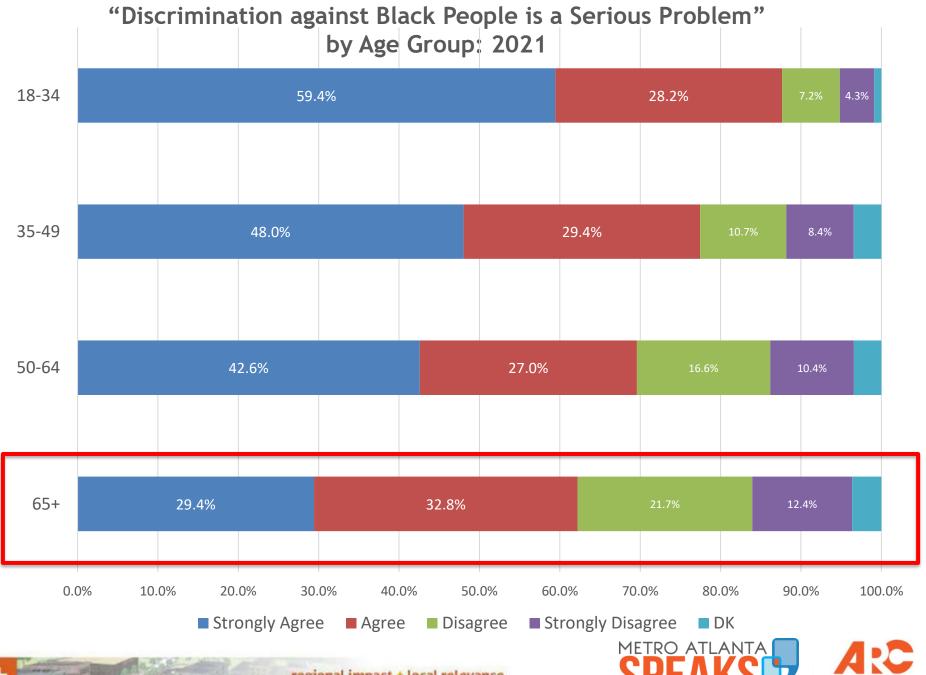


Discrimination against Black People is a Serious Problem" Comparing 2020 and 2021





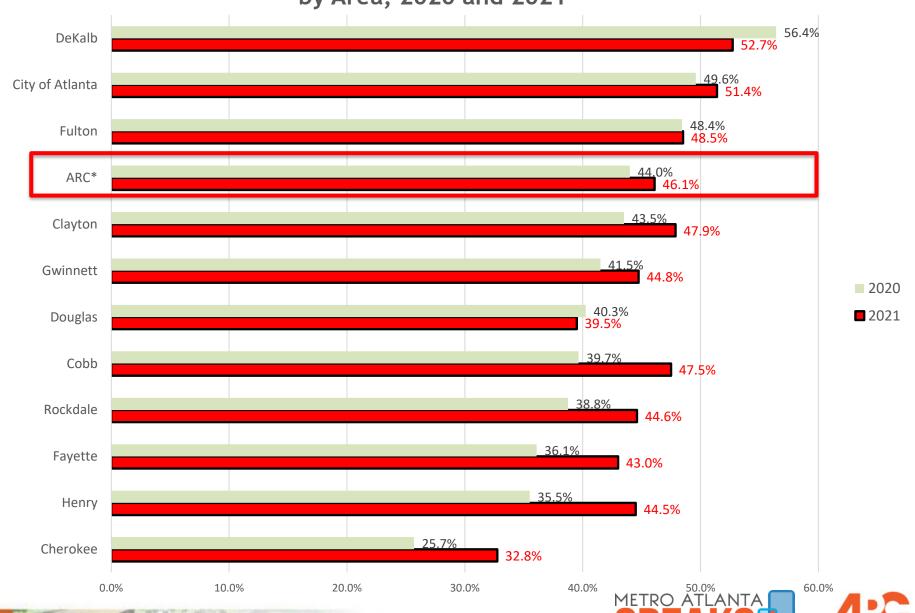




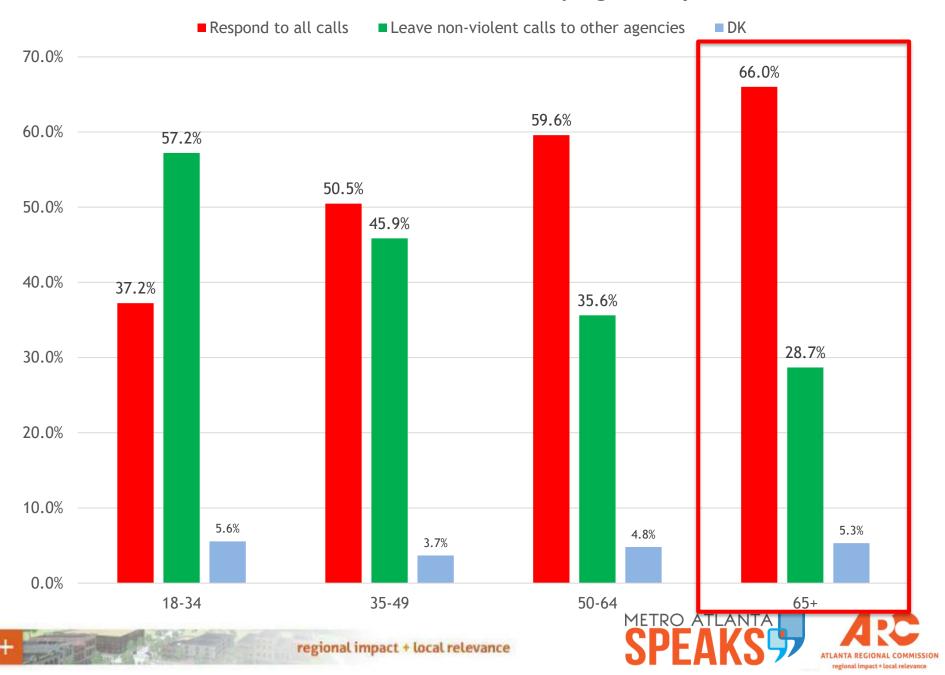




Shares Open to Non-Police Response to Every Call by Area, 2020 and 2021



"How Should Police Best Be Utilized?: by Age Group: 2020





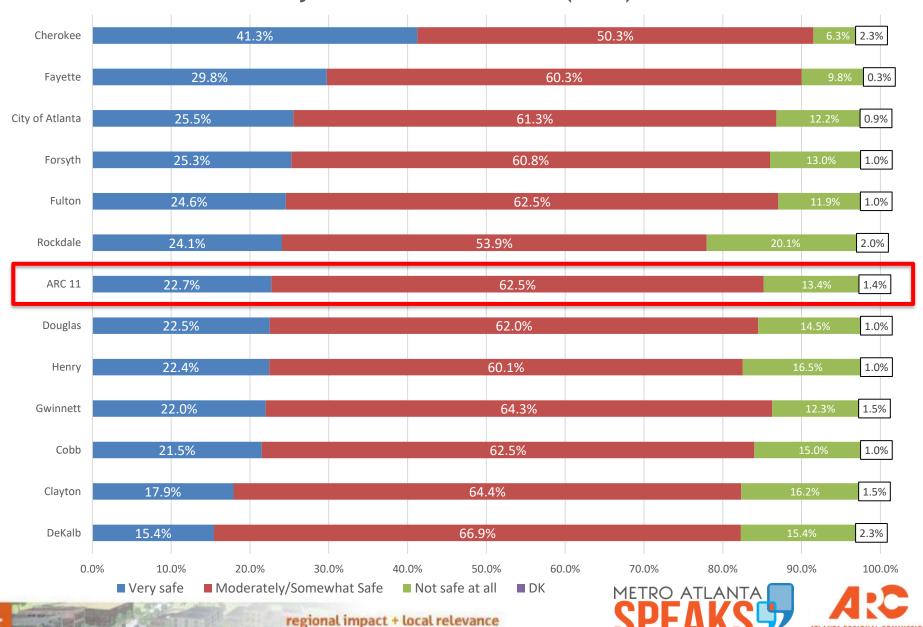






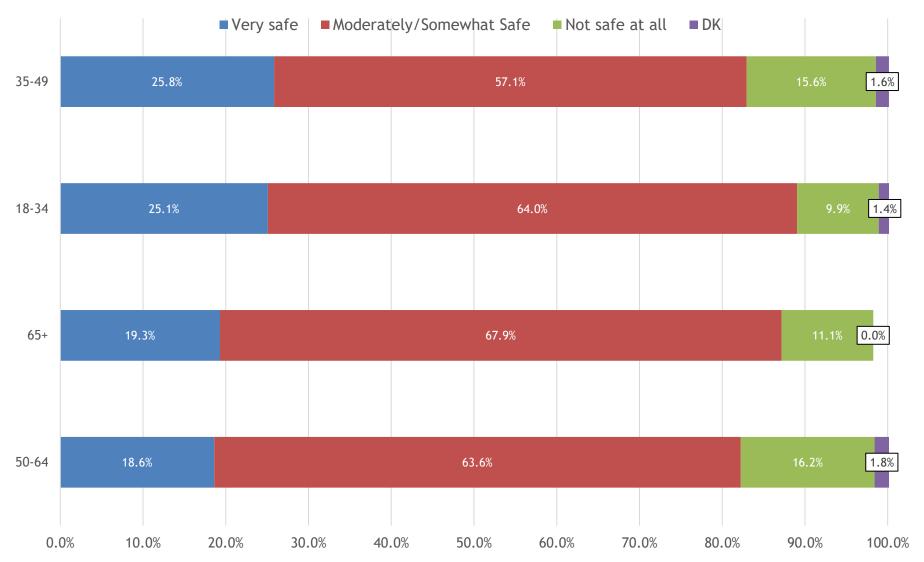


How safe does respondent feel resuming normal activities as community recovers from Covid? (Area)...2021



regional impact + local relevance

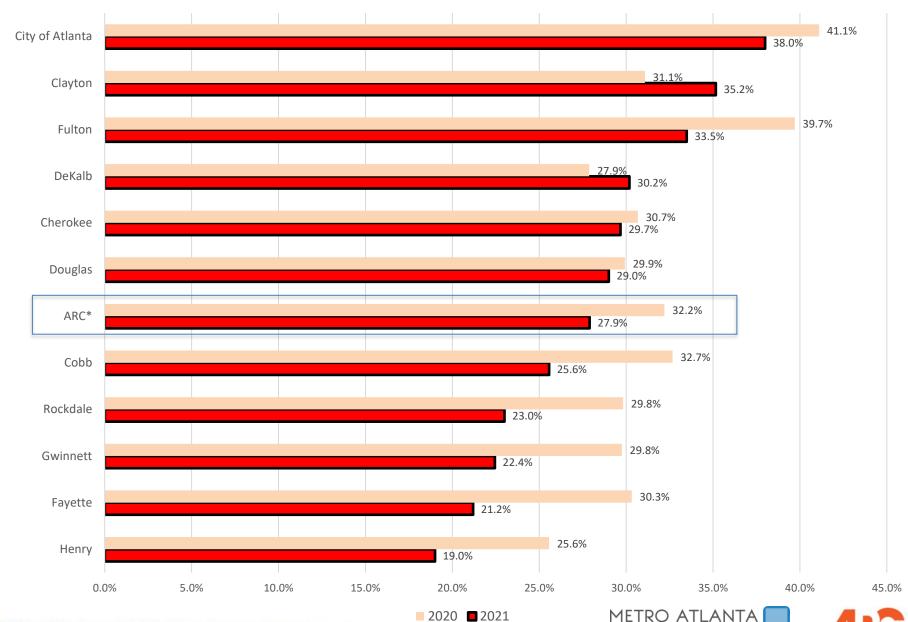
How safe does respondent feel resuming normal activities as community recovers from Covid? (Age)...2021



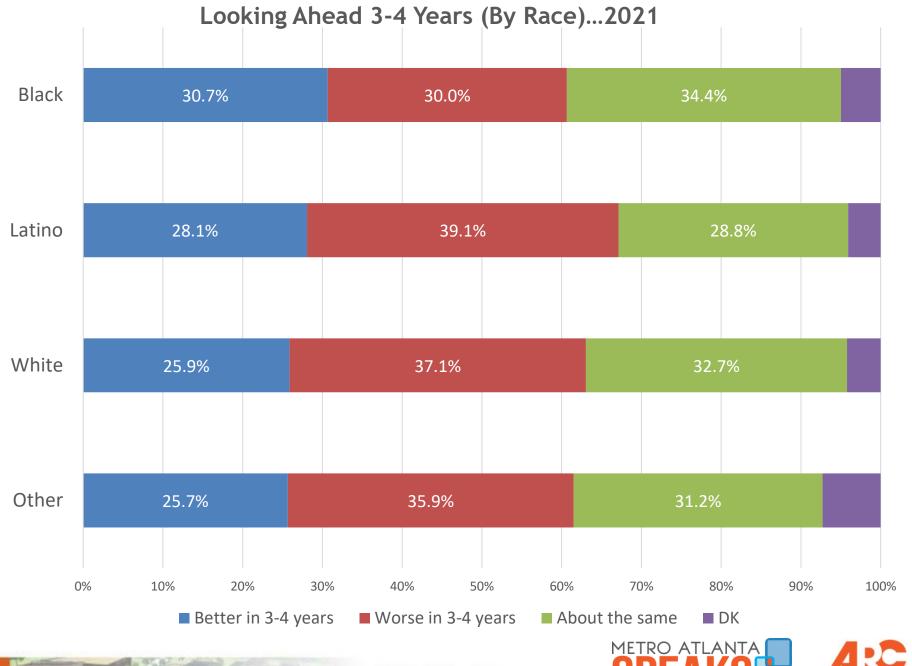




Looking Ahead 3-4 Years... "Better?" 2020 cf: 2021











For (Much) More Information...

Special County-Specific Workbooks

Let Us Know About Questions



The highlights and more complete analysis: The Atlanta Regional Commission site has a Metro Atlanta Speaks page with overviews, slide decks, the question set, and a downloadable report.

Metro Atlanta Speaks Survey Offers a Snapshot of Region's Top Concerns

The data:

Our 33N research blog has a <u>dashboard</u> with questions and responses dating to 2016.





Data stories:

The 33N blog has a <u>page</u> devoted to analysis of Metro Atlanta Speaks results.

Jim Skinner, Data Analyst Administrator
Research & Analytics, Center for Livable Communities, ARC
jskinner@atlantaregional.org





What's Coming (and Probably Going)

- Changes....
 - No 2022 MAS (at least like 2014 to 2021, or maybe not even like 2013)
 - Why? Reason 1: Financial Pressures
 - Reason 2: Desire to "Transition to Flexibility"
- Perhaps a MAS "1.25" for 2022
- BUT MAS 2.0 coming in 2023-24
 - Concept is a community engagement panelbased platform
 - Pilot(s) this Summer--GCO
 - Funding options being explored



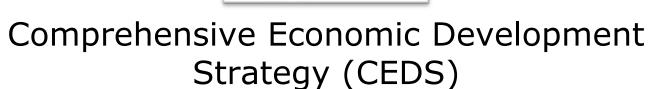












What is the CEDS?

The <u>Comprehensive Economic Development Strategy (CEDS)</u> is a locally-based, regionally-driven economic development planning process and document that creates the space for your region to identify its strengths and weaknesses and brings together a diverse set of partners to generate good jobs, diversify the economy, and spur economic growth.

<u>Current CEDS: CATLYST Regional Economic Competitiveness</u>
<u>Strategy - ARC (atlantaregional.org)</u>

- Required for EDA designation as an Economic Development District
- Updated every five years
- Submitted to EDA regional office for approval
- Requirement for various EDA funding including Public Works and Economic Adjustment Assistance programs & CARES Act funding



CEDS Schedule









TASKS	Jan '22		Feb '22		Mar '22		Apr '22		May '22		June '22	
	1/15	1/31	2/15	2/28	3/15	3/31	4/15	4/30		5/31		6/30
Task 1- ENGAGEMENT									\rightarrow		\rightarrow	
1.1 - Focus Groups								1				
1.2 - Interviews								į.				
1.3 - Surveys												
1.4 - General Public Engagement								i .				
Task 2- Develop Strategic Direction/Action Plan and Evaluation Framework								1				
2.1 - Economic Profile (Summary Background)								1				
2.2 - SWOT Analysis								1				
2.3 - Strategic Direction/Action Plan								1				
2.4 - Evaluation Framework								į.				
2.5 - Economic Resilience Documentation												
Task 3- Document Format Development								i				
Task 4- Prepare Project Final Deliverables												
4.1 - Draft CEDS Document								i	Due 5/6			
4.2 - Final CEDS per Committee and ARC Comment								İ			Due 6/10	



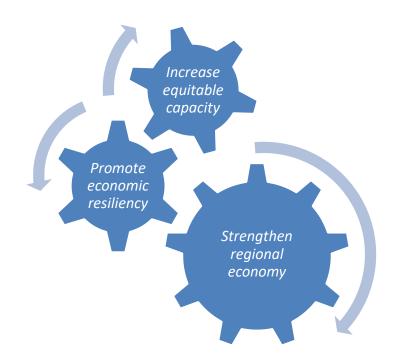
Draft CEDS Complete



ARC Adoption of CEDS



Guiding Principles







CLUSTER ANALYSIS

The five most concentrated industry clusters within the Atlanta region are:

- 1. Information
- 2. Management
- 3. Transportation & Warehousing
- 4. Admin. & Waste Management
- 5. Wholesale Trade

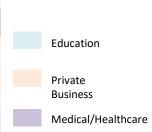
These clusters remained the same throughout the pandemic and in some cases, such as the Information industry, the cluster grew.



Metro Atlanta's 20 Largest Employers

Employer	Full-Time Metro Area Employees (as of 12/31/20)
Emory University	32,594
Delta Air Lines	27,535
Northside Hospital	23,600
Gwinnett County Public Schools	21,493
The Home Depot	18,600
Wellstar Health Systems	17,740
Piedmont Healthcare	16,000
Cobb County Public Schools	12,179
UPS	11,300
Fulton County Public Schools	11,172

Employer	Full-Time Metro Area Employees (as of 12/31/20)
Publix	10,757
Children's Healthcare of Atlanta	7,711
Cox Enterprises	7,417
Argenbright Holdings	7,410
State Farm	7,300
Georgia Institute of Technology	7,180
Northeast Georgia Health System	7,035
Georgia State University	5,550
Cherokee County Public Schools	5,000
Grady Health System	4,928









FIRM SIZE

Nearly 60% of those employed in the Atlanta region in 2019 were employed by the largest firms (500+ employees).

However...

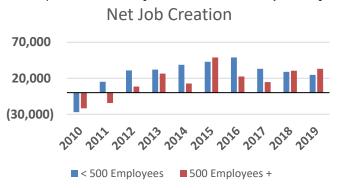
- Only 3% of all firms in the region have at least 500 employees
- These large firms represent just over **66%** of the region's overall payroll.

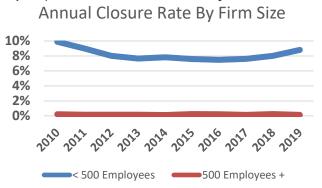


FIRM SIZE

Over the past decade, firms with **less** than 500 employees have been larger net creators of jobs within the region, creating nearly **270,000 jobs vs. 161,000 jobs** created by firms with fewer than 500 employees.

For the past decade, the largest firms have consistently had longer longevity compared to smaller firms within the region.



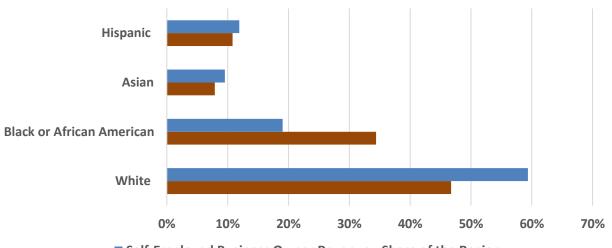


Source: KB Advisory Group from U.S. Census Annual Business Survey (2020) and Business Dynamics Survey (2019)





SELF-EMPLOYED BUSINESS OWNERSHIP

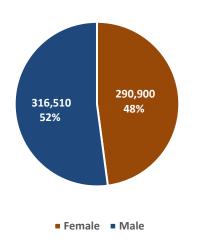


- Self-Employed Business Owner Revenue Share of the Region
- Self-Employed Business Owners Share of the Region

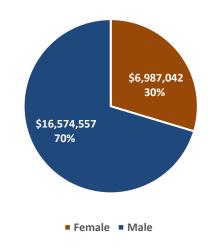
Source: U.S. Census Bureaus' Non-Employer Business Statistics

SELF-EMPLOYED BUSINESS OWNERSHIP

Self-Employed Business Owners by Gender

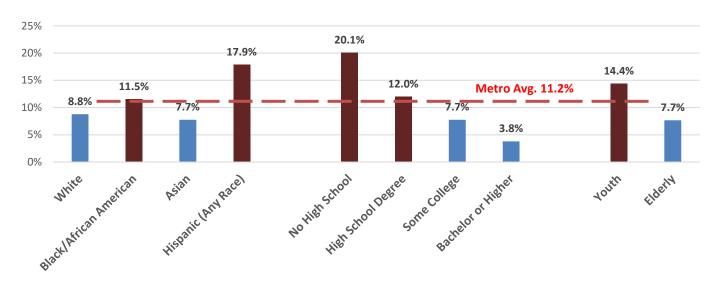


Self-Employed Business Revenue (\$1,000s) by Gender



Source: U.S. Census Bureaus' Non-Employer Business Statistics

POVERTY RATE, 2020

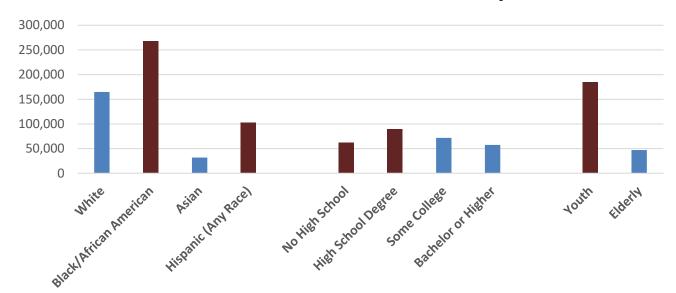


Source: U.S. Census Bureau





CONCENTRATION of POVERTY, 2020



Source: U.S. Census Bureau







What actions are needed to:

- Strengthen the economy?
- Increase equitable inclusion?
- Promote economic resiliency?

What partnerships are needed?



Targeted Surveys

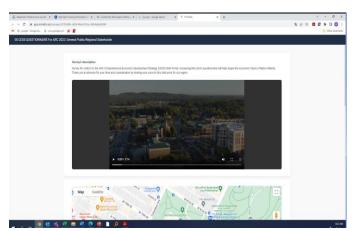
We Want To Hear MORE From You!



Take One of Our Surveys and Share with

Others

- Economic Development
- City and Regional Planners
- Government Leaders
- Small Business
- Non-profits
- Faith Based Community
- Creative/Arts Community
- Education



Targeted Survey Links

General:

https://app.mirialiti.net/surveys/c579c69b-c424-4bed-91ac-d454a6a8c694

Economic Development/Planning - Community Improvement Districts (CIDs):

https://app.mirialiti.net/surveys/3d841d00-e821-4c51-b1bc-cbdccae96b6f

City and Regional Planners:

https://app.mirialiti.net/surveys/dcf24c35-199b-4710-85bc-f0f88424f0b1

Government Leaders:

https://app.mirialiti.net/surveys/b12ad4b0-e614-462d-98b9-d3cecd32f812

Focus Groups

We Want to Hear MORE From You!

Participate in a Focus Group

- Economic Development Professionals/Planners
- Government Leaders
- Small Business/Workforce
- Education
- Non-profits/Faith Based Community (Joint)
- Creative/Arts Community
- Identified Demographics





Website

<u>Information and updates:</u> <u>atlantaregionalceds2022.org</u>







