



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 2017-2022

City of St. Louis and St. Louis County, Missouri

NOVEMBER 3, 2016
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ST LOUIS
ECONOMIC
DEVELOPMENT
PARTNERSHIP



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COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

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AN ACTION—BASED COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

The St. Louis Economic Development Partnership (SLEDP) was formed in 2013 by merging economic development components of the St. Louis Development Corporation, representing the City of St. Louis, with the St. Louis County Economic Council, representing St. Louis County. With the economic development merger, this is the first Comprehensive Economic Development Strategy (CEDS) prepared for the joint organization. Both the City and the County have adopted their own CEDS plans in prior years. To maximize the positive impacts of the CEDS, therefore, the SLEDP and SLDC agreed to work jointly in creation of the current CEDS.

More than 1.3 million people live in the City and County, making up nearly half of the St. Louis metropolitan area, which has 2.8 million people spread over 15 counties. The City and the County are the only counties (thinking of the City of St. Louis as its own county) in the metro area where there are more jobs during the day than labor force at night. All the other 13 counties are “net bedroom communities” from which more workers commute into St. Louis City and County than the other way around. According to the U.S. Bureau of Economic Analysis (BEA), in 2014, there were 1.04 million jobs located in the City and County. This amounted to 61 percent of all jobs in the metro area. But the City-County share was higher in 2001 at 1.6 million jobs or 65 percent of the metro area. In fact, both jurisdictions lost jobs between 2001 and 2014 (a combined decline of 24,000 jobs) while the rest of the metro area added 85,000.

The challenge is apparent. While it is, of course, desirable that the metropolitan area expand in terms of jobs, population, and prosperity, the City and County are losing ground—both numerically and relatively. The closing of major automobile assembly plants over the last decade and a half has certainly contributed to that decline. There have also been many shifts to and growth in other counties, quite often leaving behind a substantial amount of vacant land and buildings in older parts of the region. Redevelopment and reinvestment therefore become high priorities for the SLEDP and SLDC. While many people think that the City and County are “built out,” there is, in fact, a great deal of real estate available for additional growth, a topic addressed in this CEDS.

Closings of plants, potential declines in federal government defense spending, shifts of population and labor force to other parts of the region, the nation, and even the world, and increasing competitiveness of larger cities and regions also raise concerns about the resilience of the St. Louis economy to adapt to cultural changes. St. Louis, as a region, has rebounded in the past. Net decreases in regional population in the 1970s were followed by growth, albeit slower than before, since then. Heavy dependency on the auto and defense industries through the 1990s triggered regional initiatives to diversify and expand the metro economy. Today, metro St. Louis is among the most balanced regional economies in the United States. Slow growing, perhaps, but more resilient to national and international business cycles than 40 or 50 years ago.

A new era, and new challenges, demand a new plan. This Comprehensive Economic Development Strategy reflects another fresh look at the economies of St. Louis City and County and their role in the bi-state St. Louis region. A CEDS Strategy Committee worked from December 2015 to October 2016 to identify critical issues and actions to strengthen the economy. But this was not the only effort in recent years. In fact, many of the recommendations of this CEDS are built on over a dozen related plans and studies since 2011. These range from transit-oriented development plans and market studies to riverfront development strategies to infrastructure improvements to workforce improvement recommendations emanating from the challenges faced by the city of Ferguson and other north St. Louis County communities in the recent past. There is no shortage of good ideas, excellent analysis, positive attitudes, and willingness to act. The focus of this five-year CEDS, therefore, is on action. A great many implementable projects are identified, many of them emerging from other economic and public engagement efforts.

SPECIAL GEOGRAPHIC CONSIDERATIONS

The executive branch of the federal government has initiated several focused efforts to provide targeted government services toward a goal of improving the degree of shared prosperity in the U.S. St. Louis County and the City of St. Louis are both participating in the Promise Zone and the City in the Strong Cities Strong Communities—which have direct impacts on, and impacts from, the CEDS and its planning process. These programs, therefore, are incorporated by reference into the CEDS.

Promise Zone

Promise Zones are designated by the federal government to address the needs of high poverty communities. An initiative of the Obama Administration, Promise Zones focus on collaboration between local and federal partners over a ten-year period to accomplish several specific goals:

- Create jobs
- Leverage private investment
- Increase economic activity
- Expand educational opportunities
- Reduce violent crime

There are currently 22 Promise Zones across the United States and Puerto Rico. Significant benefits of a Promise Zone designation include preferential access to 13 designated federal agencies, technical assistance from those agencies, support for AmeriCorps/VISTA volunteers, and preference points for selected federal grant programs. Incorporation of the Promise Zone into this CEDS document and analysis is intended to reinforce future partnerships with the federal government in revitalizing the St. Louis area economy.

The St. Louis Promise Zone was designated in April of 2015 and encompasses areas of both the City of St. Louis and St. Louis County. It is the geographically largest Promise Zone in the U.S. with a population of approximately 200,000 and is the only one that encompasses parts of two county-level jurisdictions. In addition, there are 27 municipalities and seven school districts within the St. Louis Promise Zone.

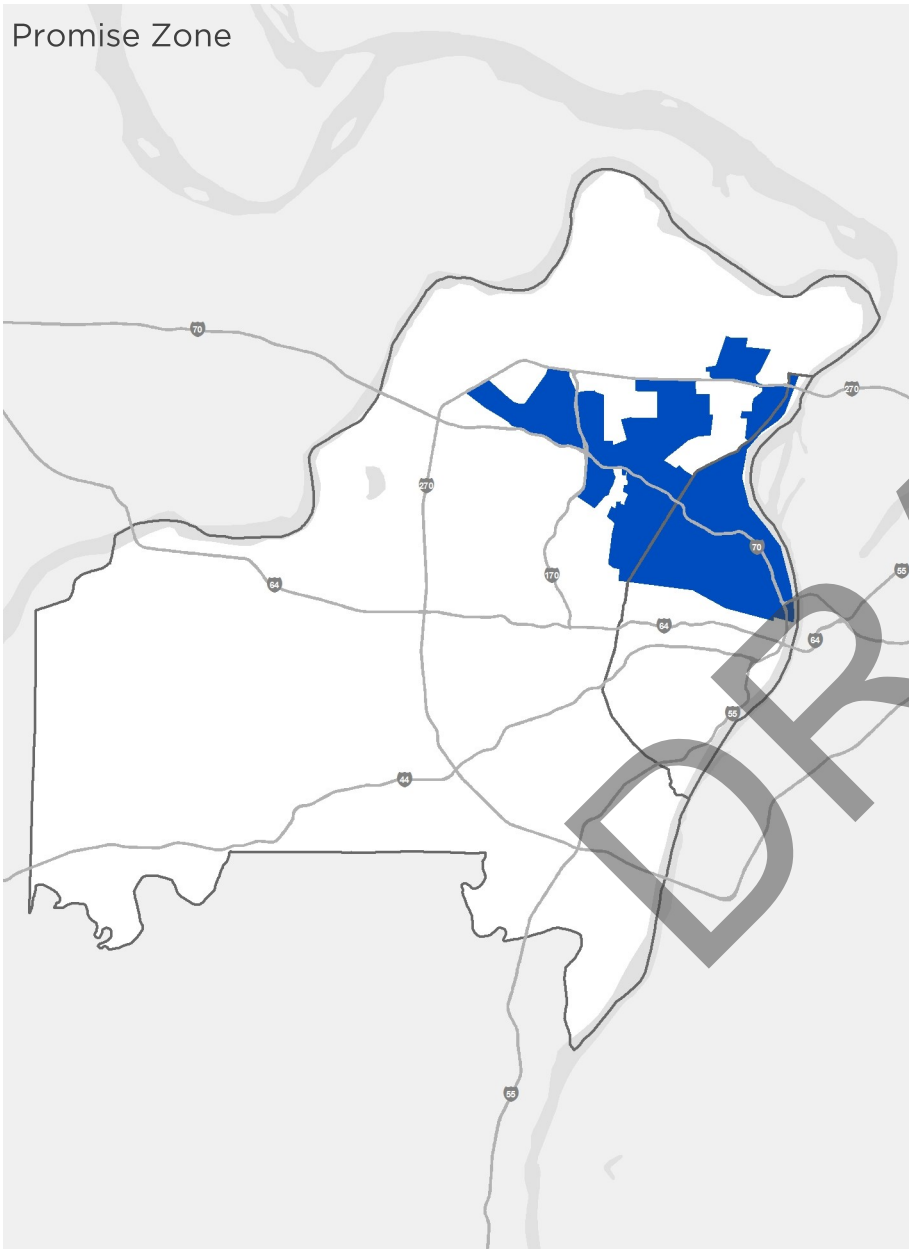
Spanning the northern communities and neighborhoods of the City and the County, the St. Louis Promise Zone has many of the challenges experienced in areas of concentrated poverty, including alarmingly high rates of unemployment, crime, homelessness, and mortality. The overall poverty rate within the Promise Zone is 36 percent and the unemployment rate is 21 percent. Significant numbers of vacant lots and abandoned buildings are both concentrated and scattered throughout. In a region where local government fragmentation and jurisdictional competition are historically barriers to progress, the Promise Zone designation is intended to be a catalyst for ongoing collaboration and change that will drive future regional growth and prosperity.

A recent, and very significant, success story for the Promise Zone was the announcement by the National Geospatial-Intelligence Agency (NGA) to make a \$1.7 billion investment in a new headquarters in North St. Louis City. This is by far the largest single public or private investment that this area has experienced in decades. When completed, the NGA will move 3,100 jobs from its current (and obsolete) facility in South St. Louis City to its new location, which is anticipated to catalyze additional development activity in the surrounding neighborhoods.

The St. Louis Economic Development Partnership is the oversight agency for the Promise Zone. In alliance with St. Louis City and County governments and the various municipalities, the Partnership is focusing on public-private collaborations to drive area revitalization and to create a better, more inclusive St. Louis region. The collaborators' six goals are:

- Increase Economic Activity
- Increase Workforce Readiness
- Reduce Serious And Violent Crime
- Improve Educational Outcomes
- Create Sustainable Mixed-Income Communities
- Improve Health and Wellness

Promise Zone



Strong Cities, Strong Communities

The Strong Cities, Strong Communities (SC2) initiative, first announced in July 2011, seeks to strengthen neighborhoods, towns, cities, and regions around the country by enhancing the capacity of local governments to develop and execute their economic vision and strategies, providing necessary federal agency technical assistance and access to federal agency expertise, and creating new public and private sector partnerships.

The City of St. Louis was designated a SC2 community in 2014. By interagency agreement, the SC2 initiative will be folded into and goals executed through the Promise Zone.

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ACKNOWLEDGEMENTS

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The Honorable Steven V. Stenger, *St. Louis County Executive*
The Honorable Francis G. Slay, *Mayor, City of St. Louis*

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Letter to be provided

SECTION ES

EXECUTIVE SUMMARY

This is the first ever Comprehensive Economic Development Strategy (CEDS) prepared for the St. Louis Economic Development Partnership, which was formed in 2013 to represent the merger of joint economic development duties of St. Louis City and County. As independent jurisdictions, the City and County have developed individual CEDS over the years, but this CEDS reflects a fresh look at their economies and shared role in the bi-state region. A new era, and new challenges, demand a new plan, but more importantly, this document represents an opportunity for sustained regional alignment and collaboration.





EXECUTIVE SUMMARY



Explore St. Louis



Moving Forward with Collaboration

As the first ever Comprehensive Economic Development Strategy (CEDS) prepared for the St. Louis Economic Development Partnership, this document represents a tremendous opportunity for sustained regional alignment and collaboration. The fragmentation of governance in the St. Louis region is part of its history—St. Louis City separated from the County more than 100 years ago and remains an independent city, while shifting regional population throughout the 20th Century, in part, led to the formation of 90 municipalities in St Louis County.

As a momentous step forward, the St. Louis Economic Development Partnership (SLEDP) was formed in 2013 by merging many of the economic development duties of the City and County to pave the way for more effective collaboration and joint prosperity. As independent jurisdictions, the City and County have developed individual CEDS over the years, but this CEDS reflects a fresh look at their economies and shared role in the bi-state region. A new era, and new challenges, demand a new plan.

Section 1: Regional Profile

St. Louis City and County are the economic drivers of the region, home to the region's primary employment, recreational, and cultural activity centers. As a result, the prosperity of the region is intrinsically linked to the successes and future direction of the City and County. However, as population continues to shift to other parts of the region (or other regions altogether), the City has now faced decades of population loss, and the County has generally had a stable population since the 1970s. The City and County are faced with a choice: better utilize existing assets to remain competitive, or lose ground to other growing regions.

The development of the following CEDS could not come at a more critical time. The St. Louis regional economy is essentially on two divergent paths—some metrics indicate that it has a well-diversified and resilient economy with a highly skilled workforce, higher-than-average income levels, and a burgeoning innovation and entrepreneurship ecosystem. On the other hand, certain parts of the region suffer from segregation, extreme poverty, and income inequality offering limited paths to upward mobility.



Section 2: Distressed Properties

After decades of disinvestment in many parts of the region, vacancy and abandonment still remain a persistent problem—roughly a quarter of the parcels in St. Louis City and around eight percent of parcels in St. Louis County are considered distressed. These parcels are largely located in North St. Louis City and Inner North County, with a particular concentration in the designated Promise Zone. There is an immediate need for the City and County to better coordinate efforts for identifying and tracking distressed properties, consolidating properties, and preparing properties for reuse, especially those with hazardous environmental conditions.

Though these parcels can be viewed as barriers to growth, with the proper funding, programs, and coordination, they also provide a tremendous opportunity for new development. Better utilization of vacant and/or distressed properties could provide opportunities for major regional redevelopment efforts in North City and County, Transit-Oriented Development and MetroLink expansion, implementation of Great Rivers Greenways regional master plan, and implementation of the St. Louis Regional Freight district plan.

Section 3: Disaster and Resiliency

In the St. Louis region, disaster recovery is typically associated with natural disasters such as flooding or tornado damage, but the region must also be prepared for a number of man-made disasters, including replacing aging and potentially hazardous infrastructure, responding to economic shocks such as major layoffs or recession, or addressing civil unrest as what was experienced after the shooting of Michael Brown in Ferguson.

In the face of these vulnerabilities, the St. Louis region has demonstrated a strong commitment to collaboration and coordination in mitigating the risk of, preparing for, and responding to potential incidents. Regional plans and programs have been put in place to bring together disparate systems and educate both leaders and the public on how to be prepared and resilient, including the 2015-2020 St. Louis Regional All Hazard Mitigation Plan developed by the East-West Gateway Council of Governments and formation of the St. Louis Area Regional Response System (STARRS), which is a consortium of regional organizations that work together to coordinate and collaborate on regional responses to “large-scale critical incidents.”

EXECUTIVE SUMMARY



Section 4: Transit-Oriented Development Potentials

Unlike many of its peer regions, St. Louis has a dedicated light rail system (MetroLink) connecting the region's primary employment centers, academic institutions, recreational amenities, tourist attractions, and transportation hubs. This existing infrastructure presents tremendous opportunities for Transit-Oriented Development (TOD) and expansion into underserved markets. The potential to create successful developments around MetroLink stations is significant—this positions the City and County to seize upon the trends of younger generations and empty nesters with growing preferences for living in walkable urban environments, but also create a transportation system that can promote equitable access to economic opportunity.

Most of the strategic direction for TOD in the region is provided in the 2013 *St. Louis TOD Framework Master Plan*. The plan is one of many development plans and related studies conducted as part of OneSTL, the region's sustainability plan, sponsored by East-West Gateway Council of Governments.

Section 5: SWOT

The analysis of the City and County's relative strengths, weaknesses, opportunities, and threats (SWOT) is supported by 21 existing plans produced during the past ten years as well as feedback from the CEDS Strategy Committee. The City and County have many assets to build upon with their high value target sectors (finance, healthcare, and bioscience), institutions of higher education, vast cultural amenities, commercial transportation and logistics infrastructure, and low cost of living. However, the City and County face significant long-term challenges including their inequitable K-12 education system, concentration and suburbanization of poverty, limited paths for upward mobility, aging infrastructure, and fragmentation of general and special purpose governments.

Opportunities for economic growth and prosperity include expansion of global connections, cultivation of human capital, emergence of the millennial generation, entrepreneurship, existing economic development network, NGA and Promise Zone. The region is challenged by slow population growth including sluggish immigration, negative image/perception, aging population, shrinking public sector finances, limited telecommunications/broadband access, and flooding.



Section 6: Metrics

As required by the EDA, performance measures must be established to evaluate the implementation and success of the goals and objectives of the CEDS. Traditionally, economic development metrics have focused on job growth and levels of real estate investment, since these are relatively easy to measure; however, they do not paint a full portrait of performance and success. The performance measures to evaluate the present CEDS aim to show broader levels of success that specifically address the vision and goals, including measures of transportation implementation, entrepreneurship, and educational attainment. Though ideally performance can be measured quantitatively, there is still much to be learned from documenting more qualitative accomplishments such as programs, events, initiatives, and community engagement.



Section 7: Action Plan

The Action Plan is the culmination of the initial technical review of existing plans, regional profile, and benchmarking and direct input from the CEDS Strategy Committee. Over four working sessions, the Strategy Committee assisted with the refinement of the SWOT analysis, development of the vision and goals, and identification of specific policies, programs, and investments to support implementation. Some action items are geographically focused by site, neighborhood, or sub-region, while others are more comprehensive aimed to address regional barriers and opportunities.

In accordance with EDA requirements, the Action Plan first and foremost, “promotes economic development and opportunity,” in St. Louis City and County, but also incorporates goals that address transportation access, protection of environmental resources, workforce development, built environment, redevelopment opportunities, technology, and alignment with existing plans and resources.

OUR VISION

We will **HARNESS THE CREATIVE CAPACITY** of the St. Louis community to **GROW OUR ECONOMY**, resulting in **SUSTAINED INCREASES** in living standards and **QUALITY OF LIFE** for **ALL OUR RESIDENTS.**

After review of previous plans and reports, analysis of data, evaluation of strengths, weaknesses, opportunities, and threats, and much deliberation, the CEDS Strategy Committee agreed to the above vision for the 2017-2022 Comprehensive Economic Development Strategy for St. Louis County and the City of St. Louis.

From this vision emerged four strategic directions of the CEDS, as shown to the right. Within these strategic directions are 23 goals statements.

STRATEGY 1

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.1 Stimulate investment in North St. Louis City, North St. Louis County, and the Mississippi and Missouri Riverfronts by supporting catalytic development and redevelopment with major infrastructure improvements and upgrades.

GOAL 1.2 Improve regional connectivity and reduce vehicle miles traveled by expanding multi-modal transportation options and adjusting land use and development incentive policies.

GOAL 1.3 Increase private real estate values, stimulate future investment and redevelopment, and provide multi-modal transportation opportunities through streetscape improvements, road diets, and appropriate street designs.

GOAL 1.4 Promote “smart technology” and innovation to ensure stable energy and information networks for regional economic and job growth.

GOAL 1.5 Increase access to the region’s natural amenities and recreational opportunities by supporting the implementation of the regional greenways and trails system.

GOAL 1.6 Support a variety of additional infrastructure improvements that increase access and safety for pedestrians and vehicles and further reduce barriers to pedestrian and bicycle connectivity.

REAL ESTATE DEVELOPMENT

GOAL 1.7 Leverage the redevelopment potential of Lambert-St. Louis International Airport.

GOAL 1.8 Stimulate sustainable infill development by leveraging existing and future transit nodes and emphasizing the redevelopment of obsolete commercial corridors.

GOAL 1.9 Develop shared regional data and administrative systems to promote real estate development and reinvestment activity.

STRATEGY 2

Supporting Entrepreneurship and Innovation

GOAL 2.1 Leverage existing, or promote creation of new, tax credit programs, lending or other funding programs that support entrepreneurs and the small business community.

GOAL 2.2 Continue providing resources to nurture high-growth startups and technology firms in the region.

GOAL 2.3 Support talent, innovation, and entrepreneurship for young professionals.

GOAL 2.4 Expand opportunities for minority- and women-owned businesses.

GOAL 2.5 Continue expanding the St. Louis region as a hub for agriculture and bio-science innovation and technology through the global plant science corridor.

STRATEGY 3

Leveraging Our Assets

GOAL 3.1 Support and/or target business retention and expansion activities.

GOAL 3.2 Improve regional, national, and international connections for business growth.

GOAL 3.3 Improve internal and external perceptions of the region with marketing and outreach programs aimed at attracting and retaining talent and establishing a positive local identity.

STRATEGY 4

Developing Our Workforce

GOAL 4.1 Continue investing in multi-modal transportation options, trail systems, higher density housing, and walkable communities as means to attract and retain a mobile workforce.

GOAL 4.2 Develop systems and partnerships that better link educational resources with employment opportunities.

GOAL 4.3 Develop and expand workforce development programs that focus on technical education, especially for individuals living in disadvantaged communities.

GOAL 4.4 Create talent attraction and retention programs for higher educated and skilled individuals.

GOAL 4.5 Accelerate opportunities for the region's foreign-born populations.

GOAL 4.6 Develop comprehensive STEM and early education resources and curricula to create a prosperous future workforce.

METHODOLOGY AND PROCESS

Completing the Comprehensive Economic Development Strategy followed a tried-and-true planning process.

1. The St. Louis Economic Development Partnership and the St. Louis Development Corporation selected members of their own staffs and a consulting team to guide and participate in the CEDS process.
2. Research was conducted to identify key issues, challenges, and desired outcomes from socio-economic data sources and from previous plans and reports.
3. A strengths-weaknesses-opportunities-threats (SWOT) analysis was completed as a means to initiate a revised vision for the five-year economic progress of St. Louis County and City as a joint economic “region.”
4. A 26-member Strategy Committee was created to represent workforce, real estate, business, and community interests in the City and County, with an emphasis on the special challenges of north city and inner north county. Much of this area is encompassed in a federally-designated “Promise Zone” to aid in increasing job readiness and economic development. The Promise Zone also has the greatest concentration of “distressed real estate” in the region—vacant land, vacant buildings, foreclosures, and tax delinquencies.
5. The Strategy Committee met four times to identify the most important issues that the CEDS should address between 2017 and 2022 and to agree upon a common vision and expected outcomes.

Previous Plans: Public Engagement Summary

The St. Louis Comprehensive Economic Development Strategy (CEDS) benefits from a strong foundation of public input collected during recent planning efforts. Through citizen task forces, scores of public meetings and working group deliberations, regional stakeholders have come together many times over the last five years to consider various facets of economic development. Common themes were evident: a recognition that the St. Louis region is not living up to its potential and needs to act strategically to maintain its position in the regional and global economy; concern regarding growing disparities in wealth, made worse by racial and political divisions; and the call for investments in human capital, infrastructure, entrepreneurship and real estate. To honor the community feedback from previous plans and studies, and out of fear of planning fatigue in the region, the CEDS public outreach process was streamlined. Throughout the planning process, the study team synthesized feedback from previous studies to prepare initial drafts of strategic planning elements for consideration of the CEDS Strategy Committee. In this way, the CEDS recognizes and builds on those previous efforts.

Of the 21 previous studies reviewed as part of the St. Louis CEDS, seven (7) involved public engagement.

Table 1 lists these studies along with their study area, engagement activities conducted, target audiences and key input regarding economic development. For the full list of plans, see page 60.

TABLE 1

Name	Study Area	Engagement Activities	Target Audience	Input Regarding Economic Development
Ferguson Commission Report, Forward Through Ferguson (2015)	Regional, emphasis on North St. Louis City and County	17 Commission meetings, 2,000+ attendance 4 work groups held an additional 38 public meetings	Local citizens, area organizations, national thought leaders, institutions, and experts	The Economic Inequity and Opportunity Work Group, one of four of the Commission's work groups, focused on economic mobility. Resulting calls to action addressed five key areas: expanding Medicaid, employment, financial empowerment, housing, and transportation.
St. Louis County Economic Development Partnership Stakeholder Engagement Forum Findings (2014)	St. Louis City and County	- Core planning team deliberations - Focus groups with target audiences	- African American leaders - Economic developers - Young professionals	To complement the half-day forum the year prior, target groups identified focus areas, desired outcomes and barriers to success which the planning team used to refine the organization's strategic plan.
Imagining Tomorrow for St. Louis County (2013)	St. Louis County	- Citizen survey - Expert-led policy roundtable discussions (9) - Regional "Idea Exchange" public meeting of 100+ regional leaders to review draft plan	- St. Louis County residents - Regional leaders - St. Louis County leadership and staff - Technical experts	According to the County's citizen survey, 85% of residents ranked attracting new companies and retaining large employers as a top County service, second only to emergency response during disasters. With regard to economic development, stakeholders called for revitalization of declining commercial centers, development of an environment of entrepreneurship, and a "cradle to college and career" mentality to help young people position themselves for economic success.
One STL – Many Communities. One Future. (2013)	8-county area of Missouri and Illinois included in the East West Gateway (MPO) Planning Area	- Regional survey 94 public meetings attended by 2,000+ residents - Four standing Committees (Steering, Technical, Public Engagement, Outcomes)	- Regional leaders - Regional residents - Technical experts	Public engagement found that economy was central to the public's definition of sustainability. People want good jobs and a strong economy that maintains or improves a high quality of life for all residents. The report calls for economic development that equitably benefits the region's citizens.
St. Louis Economic Development Partnership Stakeholder Planning Forum (2013)	St. Louis City and County	- Half day forum to kick off strategic planning process -large group keypad polling -small group discussions	100+ leaders of local governments, businesses, economic development organizations and non-profit/social service agencies	Participants identified strengths, challenges, focus areas, economic development priorities and action items. Six strategies were identified for the new agency: grow/retain jobs and capital investment, support startups and the entrepreneurial community, increase foreign trade and investment, advance redevelopment of strategic real estate assets, accelerate the growth of the region's foreign born population, and align talent with business needs.
St. Louis Sustainability Study (2011)	City of St. Louis	- City department data gathering and engagement - Sustainability Task Force deliberations - Community survey of 1,169 respondents (2) Mayor's Sustainability Summits with 800+ participants	- General public, City of St. Louis - City of St. Louis employees - Sustainability practitioners	Based on input from the public, one of the Plan's seven overarching goals is Prosperity, Opportunity and Employment, which includes a defined set of action steps related to job creation, real estate investment, and investment in human capital.
St. Louis Regional Economic Adjustment Strategic Plan (2011)	Regional focus that included both Missouri and Illinois with special attention to St. Louis County	Stakeholder interviews with 100+ individuals to clarify perceptions, issues, and opportunities related to regional economic recovery following the Chrysler plant closing	Civic, public, private and institutional entities	Priorities expressed through stakeholder interviews included improving workforce development opportunities; nurturing and supporting entrepreneurship; developing strategies to overcome fragmented governance; and investing in infrastructure, transportation and logistics.

METHODOLOGY AND PROCESS

Previous Plans: Strategic Alignment

Of the previous plans, the strategic planning effort of the St. Louis Economic Development Partnership in 2013 was particularly relevant. The Partnership was formed in 2013, combining economic development efforts in St. Louis City and County for the first time. To inform the role of the new agency, a very deliberate and thoughtful public involvement process took place involving diverse stakeholders across the regional economy. The target audience of economic development stakeholders in St. Louis City and County and the goal to identify the most impactful regional economic development strategies closely aligns with the purpose of the CEDS.

Due to the timing of the CEDS, the Ferguson Commission's report along with the months of regional introspection that followed the death of Michael Brown in August 2014, were influential as well. The Commission met for over a year, involved thousands of people and was extensively covered in the media, raising awareness about poverty, racial tension and disparities of opportunity in the region.

The highly anticipated Commission report was published in September 2015, shortly before the CEDS Strategy Committee began its deliberations. The report's emphasis on economic mobility echoed sentiments expressed often by stakeholders in earlier planning efforts. The Commission's report, with the added weight of recent events, created a growing desire among regional leaders and citizens for economic development to play a role in generating more opportunities for more people in the region. The CEDS Strategy Committee reflected the heightened sense of urgency around shared prosperity in their conversations on strengths, weaknesses, goals and desired outcomes for the regional economy.



SECTION 1 REGIONAL PROFILE



SECTION 2 DISTRESSED PROPERTIES PROBLEMS AND SOLUTIONS



SECTION 3 DISASTER AND RESILIENCY



SECTION 4 TRANSIT-ORIENTED DEVELOPMENT POTENTIALS



SECTION 5 STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS



SECTION 6 METRICS



SECTION 7 ACTION PLAN

SECTION 1

REGIONAL PROFILE

The St. Louis regional economy is essentially on two divergent paths—some metrics indicate that it has a well-diversified and resilient economy with a highly skilled workforce, higher-than-average income levels, and a burgeoning innovation and entrepreneurship ecosystem. On the other hand, certain parts of the region suffer from segregation, extreme poverty, and income inequality offering limited paths to upward mobility.



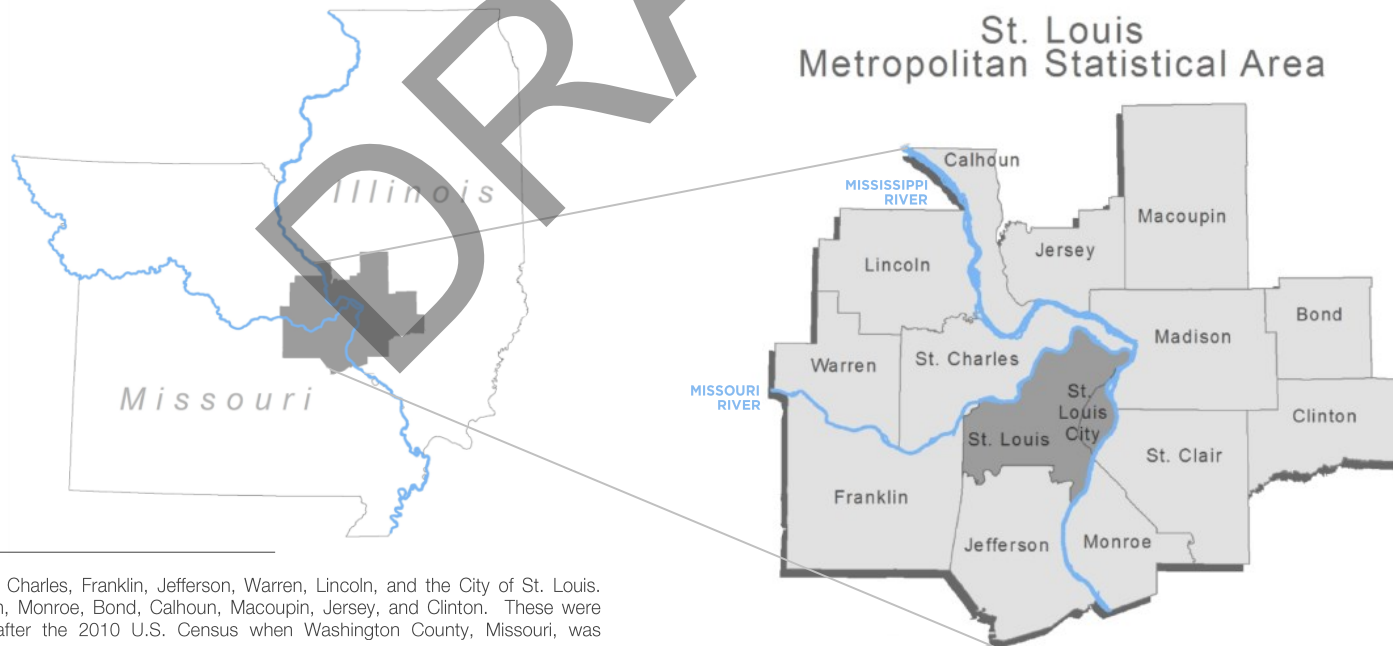
Geographic Context

Founded as a French fur trapping colony and strategic frontier outpost, St. Louis and the surrounding bi-state region has been, and continues to be, at the crossroads of trade, exploration, innovation, design, and culture. In 1900, St. Louis City was the fourth largest city in America behind New York, Chicago, and Philadelphia, and was the largest “western” city until the rapid growth of Southern California in the 1920s.

At present, the St. Louis metropolitan area is defined as 15 contiguous counties—seven in Missouri, including the City of St. Louis, and eight in Illinois.¹ At just over 2.8 million residents, St. Louis is the 19th most populated region in the U.S. Until the mid-1960s, the metro area experienced population growth at roughly the same rate as the nation as a whole, but then lost population during the 1970s because of large shifts to southern and southwestern regions. The metro area resumed net growth in 1980, but that growth has occurred at about one-third of the growth rate of the U.S.

St. Louis City and County have a combined population of just over 1.3 million, not quite half of the metropolitan population. They are located in eastern Missouri along the west banks of the Mississippi River just southeast of the Mississippi’s confluence with the Missouri River. Much of the northern and western boundary of St. Louis County is also defined by the Missouri River. The City formally separated itself from the County in 1876, but the two “county-level” jurisdictions often work collaboratively on regional projects.

Understanding the St. Louis region is a tale of two divergent paths. On one hand, median household incomes are higher than the national average and the region has a higher proportion of its residents with bachelors or advanced degrees than the national average. On the other hand, the region overall ranks below the national average in metrics related to poverty and income inequality; while certain portions of the region, especially parts of North St. Louis City and Inner North St. Louis County suffer from severe disinvestment with limited benefit from the region’s relative prosperity.



¹ Missouri counties of St. Louis, St. Charles, Franklin, Jefferson, Warren, Lincoln, and the City of St. Louis. Illinois counties of St. Clair, Madison, Monroe, Bond, Calhoun, Macoupin, Jersey, and Clinton. These were designated the metropolitan area after the 2010 U.S. Census when Washington County, Missouri, was dropped.

Sub-Regions

For the purposes of the CEDS, St. Louis City and County are generally defined by nine unofficial economic sub-regions. These areas are unique in terms of socio-economic characteristics, land use, built environment, and employment concentrations.

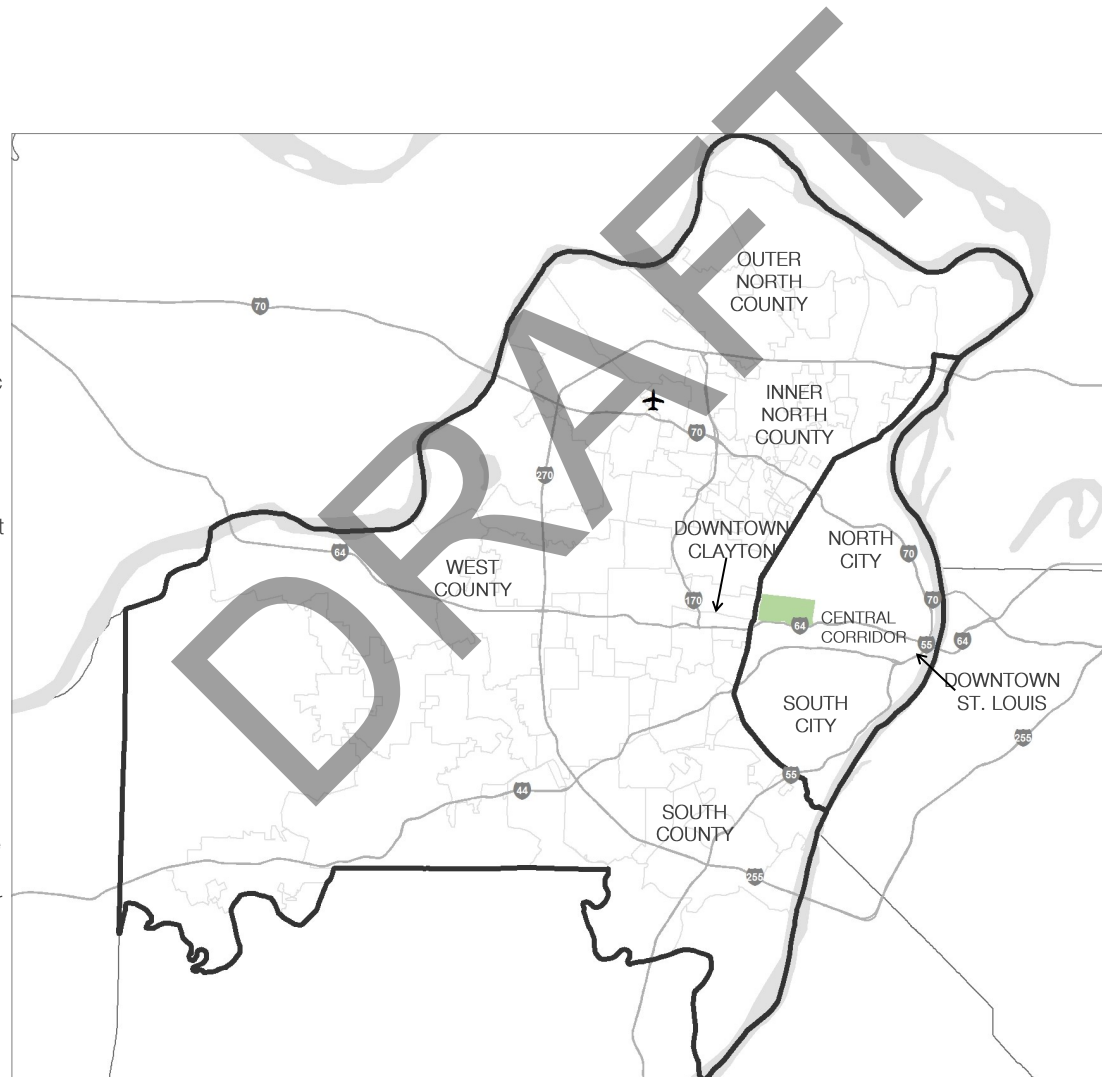
Outer North County: Primarily residential area with a stable population and household incomes generally comparable to the region.

Inner North County: Highest concentrations of poverty in St. Louis County and many of the area municipalities face similar socio-economic challenges as North City.

Downtown Clayton: The region's "second Downtown" located in St. Louis County containing 10.1 million square feet of office space and home to St. Louis County government.

West County: Contains some of the highest concentrations of high-income households in the U.S., especially along the I-64 Corridor, and many of the region's major corporate headquarters along the I-270 beltway.

South County: Includes relatively stable middle-income communities, although some areas are still recovering from major declines in manufacturing employment, most notably from the closing of Daimler-Chrysler's St. Louis Assembly Plant (Fenton, MO) in 2009.



North City: Includes some of the highest concentrations of poverty in the region and continues to suffer from blighted conditions and population loss.

Central Corridor: Contains the highest median household incomes in the City and is home to the region's burgeoning biotech innovation district Cortex, BJC Healthcare (the region's top private employer), and Saint Louis University.

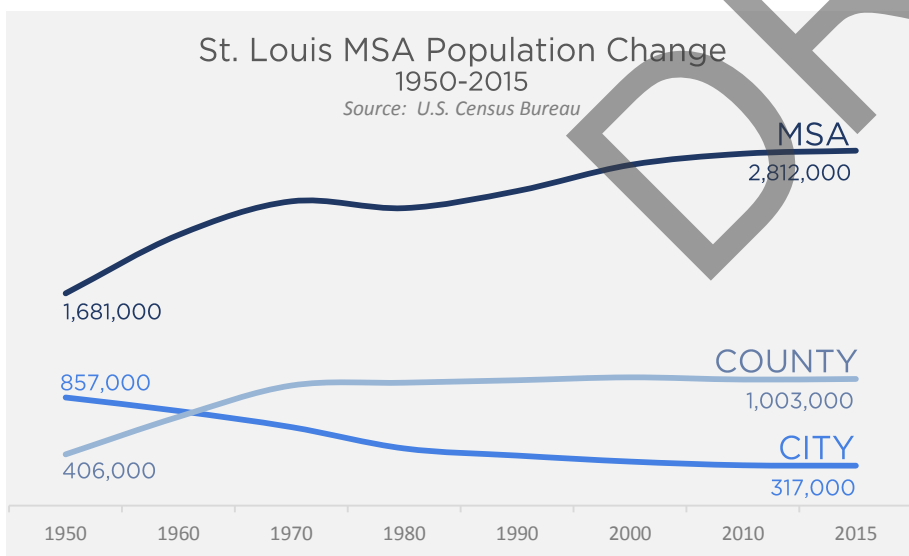
Downtown St. Louis: Primary employment center in the region with 26.8 million square feet of office space. Downtown is also home to some of the region's primary tourism and recreational amenities including the St. Louis Gateway Arch (a national park), Busch Stadium (St. Louis Cardinals), and America's Center Convention Complex (conventions). Additionally, more than 1,800 residential units have entered the market since 2005.

South City: Highest population density in the region and includes a diverse mix of socio-economic characteristics. Significant revitalization has occurred in select neighborhoods over the last decade.

DEMOGRAPHIC PROFILE

Population

With a 2015 population of 2.8 million, the St. Louis MSA is the 19th largest metro area in the United States; however, it is a slow-growing region and continues to be outpaced by other major population centers in the Midwest and throughout the country. From 2000 to 2015, the MSA's population increased by 3.7 percent, significantly lower than the nation that grew by 13.7 percent. St. Louis City and County contain nearly 47 percent of the region's population. However, St. Louis City continues to lose population and St. Louis County lost population for the first time in 2010. St. Louis City had a population of over 850,000 in 1950 making it the eighth largest city in the United States at the time. It has lost population every decade since, shrinking to approximately 317,000 people in 2015. St. Louis County absorbed a large proportion of the City's population through regional shifting, growing from just over 400,000 in 1950 to more than 1,003,000 in 2015. However, the County has not experienced much growth since the 1970s as other parts of the region continue to grow.



Domestic/International Migration

The slow pace of growth in the St. Louis region can be in part attributed to the slow pace of both domestic and international migration. Of the largest 52 metro areas in the United States from 2010 to 2014, St. Louis had the sixth lowest increase in net international migration as a percentage of the total population (0.41 percent) and had a net loss in domestic migration of 1.4 percent. Given these trends, community leaders have recognized the importance of attracting more foreign-born people to the region. The St. Louis Mosaic Project was launched in 2012 by the St. Louis Economic Development Partnership and World Trade Center St. Louis to encourage international immigration by creating more opportunities for entrepreneurship and innovation. The goal of the initiative is to have the largest proportional increase of any U.S. metro area in foreign-born population by 2020.

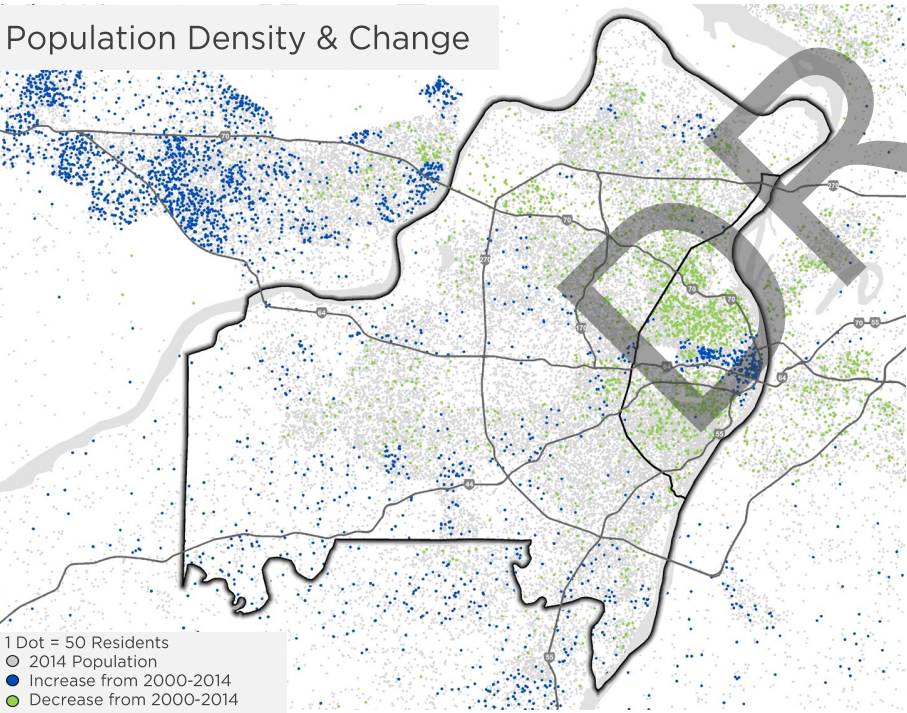
Net Domestic Migration		
Percent of 2010 Population, 2010-2014		
Rank	Region	% Change
1	Austin	7.4%
2	Raleigh	4.9%
3	San Antonio	4.0%
4	Denver	4.4%
5	Nashville	4.1%
6	Charlotte	3.8%
7	Orlando	3.4%
8	Houston	3.2%
9	Oklahoma City	3.0%
10	Dallas	2.9%
21	Columbus	* 1.1%
22	Indianapolis	* 0.9%
Peer Midwest Average		0.2%
30	Minneapolis	* 0.0%
32	Kansas City	* -0.1%
37	Cincinnati	* -0.9%
41	St. Louis	-1.4%
42	Milwaukee	* -1.5%
46	Cleveland	* -1.8%
47	Detroit	* -2.1%
49	Chicago	* -2.5%

Net International Migration		
Percent of 2010 Population, 2010-2014		
Rank	Region	% Change
1	Miami	4.7%
2	San Jose	3.8%
3	Wash. D.C.	3.1%
4	New York	3.1%
5	Orlando	3.0%
6	San Francisco	2.5%
7	Boston	2.6%
8	Seattle	2.2%
9	Houston	2.2%
10	Los Angeles	2.1%
20	Minneapolis	* 1.4%
United States		1.3%
28	Chicago	* 1.1%
31	Columbus	* 1.1%
33	Detroit	* 1.0%
39	Indianapolis	* 0.9%
42	Cleveland	* 0.8%
44	Kansas City	* 0.7%
45	Cincinnati	* 0.8%
46	St. Louis	0.6%
47	Milwaukee	* 0.6%

Source: Where We Stand, 7th Ed, East West Gateway, 2015
* Peer city

Intra-Regional Migration

The spatial patterns in population change within the St. Louis region also demonstrate the challenges that St. Louis City and County face in attracting and supporting new development and sharing economic prosperity. Population change (and development) continues to push into exurban areas in St. Charles County (MO), Jefferson County (MO), and on the Illinois side of the MSA (“Metro East”). There has been positive change in Downtown St. Louis and the City’s Central Corridor, but South City, and especially North City, continue to lose population and face considerable population decline challenges. Though much of St. Louis County has had stable population change over the last decade, many communities in Inner North County, including Ferguson, Dellwood, Wellston, and Pagedale, are losing population.



Municipal Population

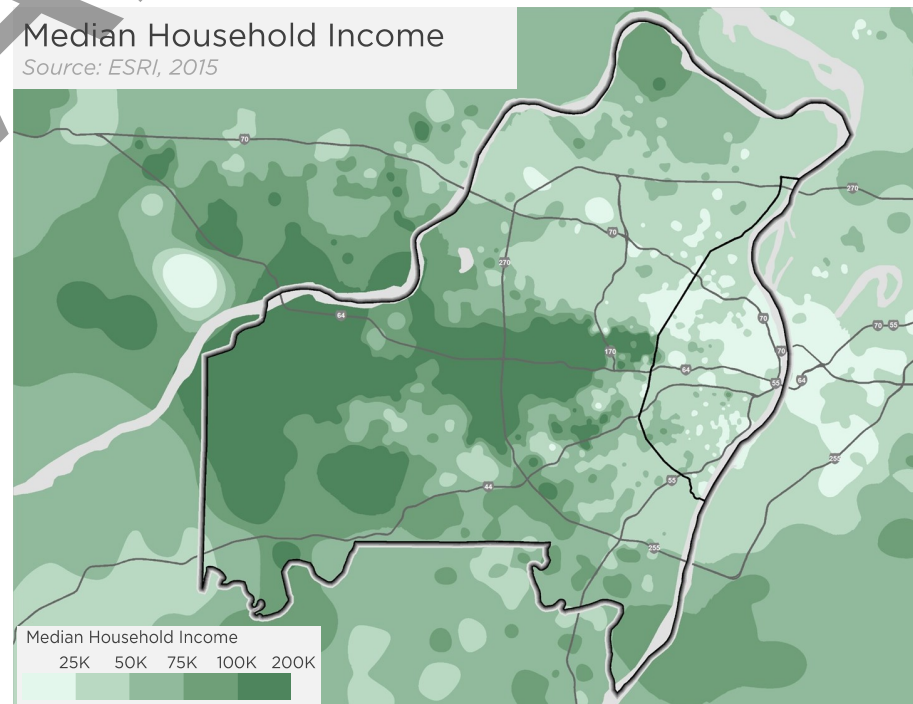
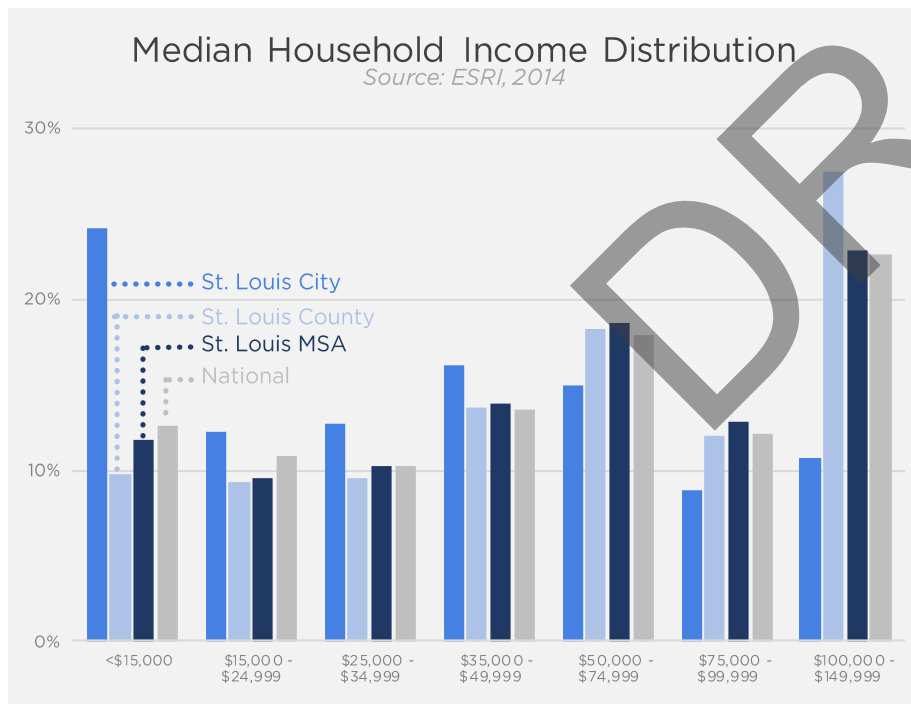
St. Louis County has 90 municipalities and 10 unincorporated Census-Designated Places (CDP), which can present challenges related to regional governance and economies of scale. According to the 2012 Census of Governments from the U.S. Census Bureau, St. Louis County ranked second in the nation in total municipalities per county behind Cook County, Illinois (Chicago). Los Angeles County is third with 88. Of the U.S. counties with populations above one million (35 total), the average population per municipality was 67,000, while the average population per municipality for St. Louis County was around 11,000. In fact, of the 150 largest counties nationwide, only four had an average population per municipality below 12,000. The smallest 45 municipalities (and CDPs) in the County (half of them) total just 55,000 in population.

20 Largest Municipalities and CDP by Population St. Louis County		
Rank	Municipality	2015 Population
1	Florissant	51,887
2	Chesterfield	47,649
3	Oakville CDP	36,449
4	Wildwood	35,618
5	University City	35,319
6	Ballwin	30,555
7	Mehlville CDP	28,171
8	Kirkwood	28,039
9	Maryland Heights	27,105
10	Hazelwood	24,950
11	Webster Groves	23,082
12	Ferguson	20,899
13	Afton CDP	20,294
14	Old Jamestown CDP	19,096
15	Spanish Lake CDP	18,855
16	Manchester	17,968
17	Creve Coeur	17,813
18	Lemay CDP	16,540
19	Concord CDP	16,150
20	Clayton	16,104
Portion of St. Louis County		54%

Income

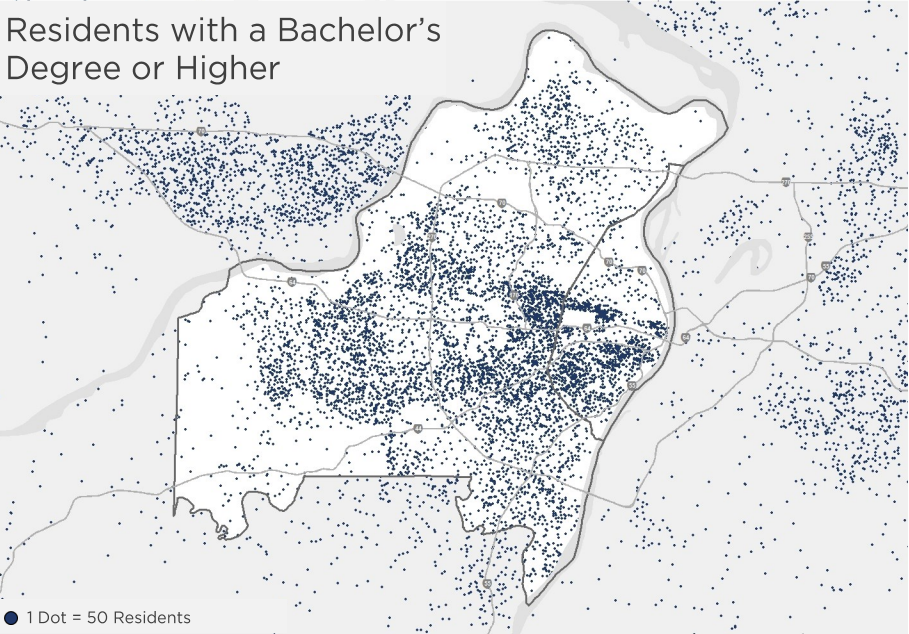
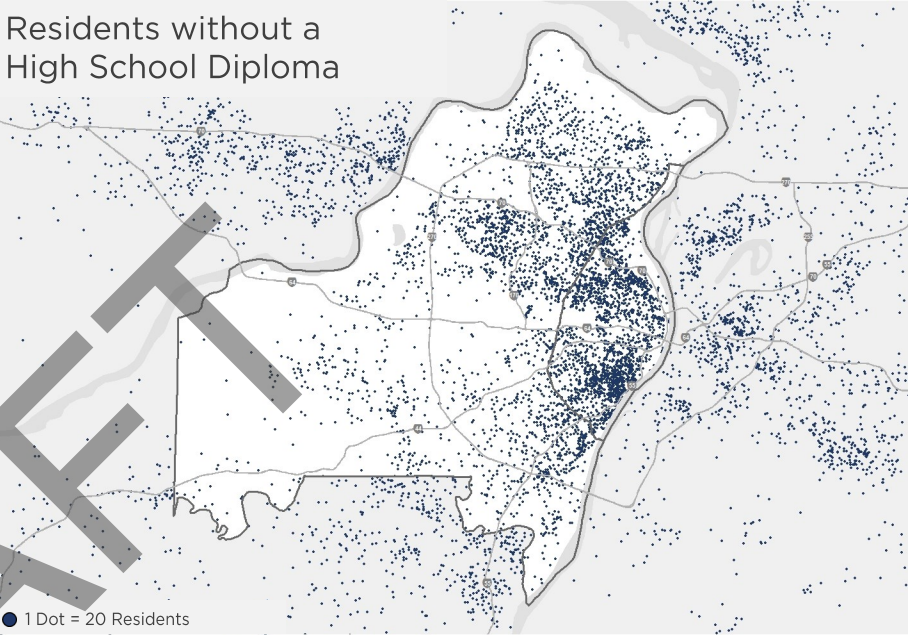
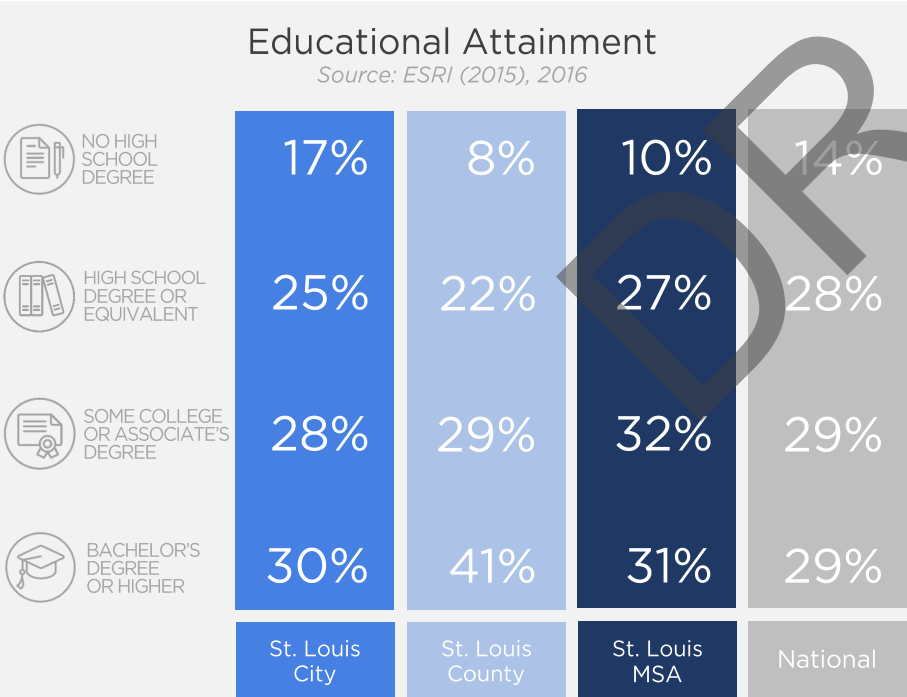
Median household income in St. Louis County (\$58,200) is higher than St. Louis City (\$35,500), St. Louis MSA (\$54,300), and United States (\$53,200); however, many communities throughout St. Louis City and County face considerable disparities in income. On one hand, many households in St. Louis County are quite prosperous—over 27 percent of households earn more than \$100,000 annually, which is higher than the region (23 percent), state (17 percent), and national average (23 percent) for this income group. St. Louis City has a considerably large proportion of low-income households earning less than \$15,000 (24 percent) compared to St. Louis County (10 percent), region (12 percent) and national average (13 percent).

The spatial distribution of median household income in St. Louis City and County gives a good indication of the areas with the greatest socio-economic challenges. Most of the City of St. Louis, especially North City, and areas of Inner North County have considerably lower median household incomes and are areas of concentrated poverty compared to the much more prosperous areas of West County along the Interstate 64 corridor.



Education

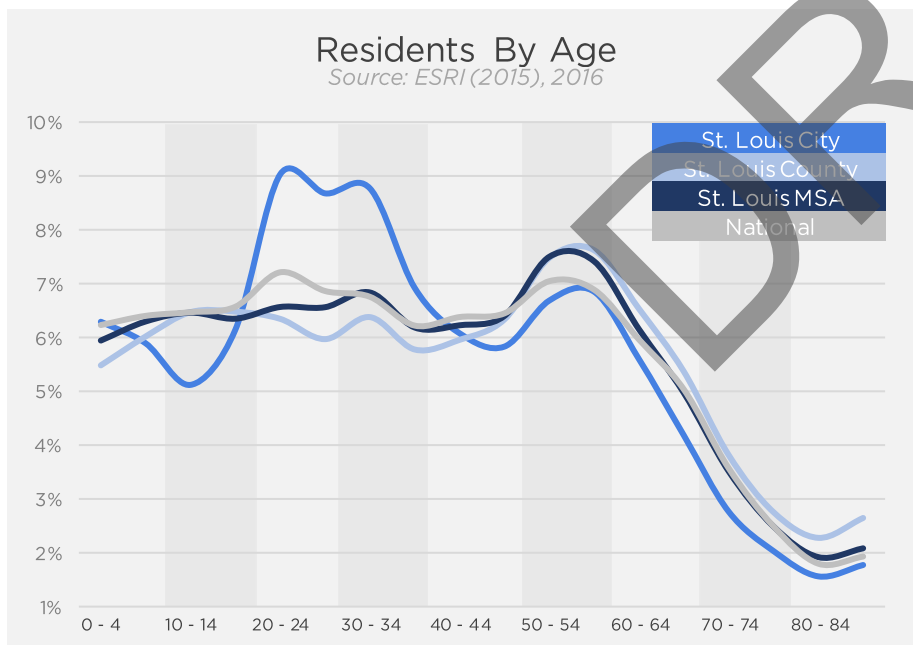
Educational levels are intrinsically linked to income potential and, thus, it would be expected that St. Louis County would have a relatively high proportion of households with a bachelor's degree or higher (41 percent) compared to the nation as a whole (29 percent). The County also has a much lower proportion of households without a high school diploma (8 percent) compared to the region and nation. Educational levels in St. Louis City are somewhat divergent since it has a higher proportion of households with bachelor's degrees or higher (30 percent), suggesting its general attractiveness for young professionals. At the same time, given the concentrations of poverty in certain areas of the City, the proportion of households without high school diplomas (17 percent) is significantly higher than the region (10 percent) and nation (14 percent).



Age

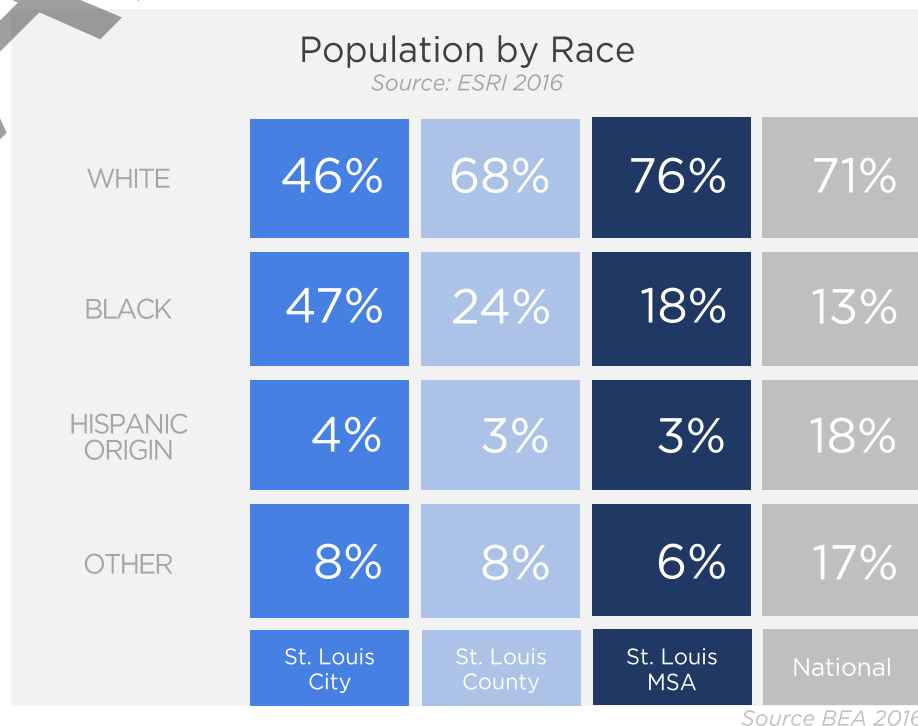
Understanding the distribution of age in the St. Louis region demonstrates the need to develop programs and policies to retain and attract young talent. The region has a higher proportion of “Baby Boomers,” or those between the ages of about 50 and 70 in 2016 entering retirement age, compared to the nation as a whole, contrasted with a lower proportion of younger “Millennial” households aged 20 to 29. It is critical that the emerging workforce has the talent and skills necessary to fill anticipated vacancies, but also that the region have a large enough workforce to generate the tax revenues necessary to support an aging population.

Many young professional households have been drawn to St. Louis City given the affordability of housing, attractive historic neighborhoods, access to public transportation, and walkability. The proportion of households aged between 20 and 39 is higher in the City than the County, region, and nation as a whole.



Race

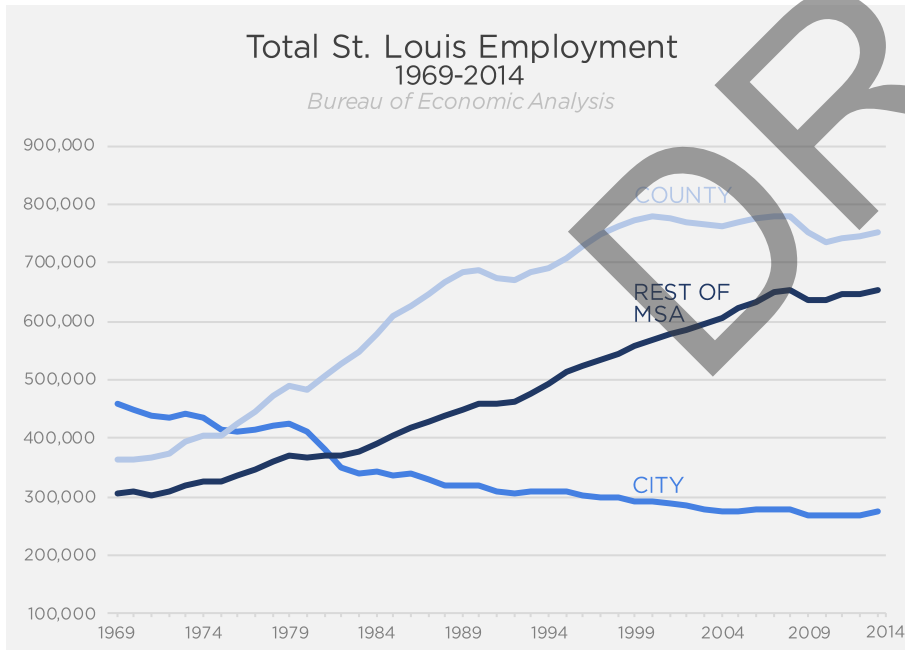
There is more ethnic and racial diversity in the City and County compared to the region as a whole. But, on a neighborhood level, the City and County are racially divided with higher proportions of black households living in low income areas in North City and Inner North County. This divide illustrates the importance of providing policies, programs, and resources to ensure equitable access to economic opportunity. Additionally, the relatively low proportion of households of Hispanic or other ethnic origins compared to national averages further emphasizes the need to create better paths of opportunity for immigrant households.



ECONOMY

Employment Change

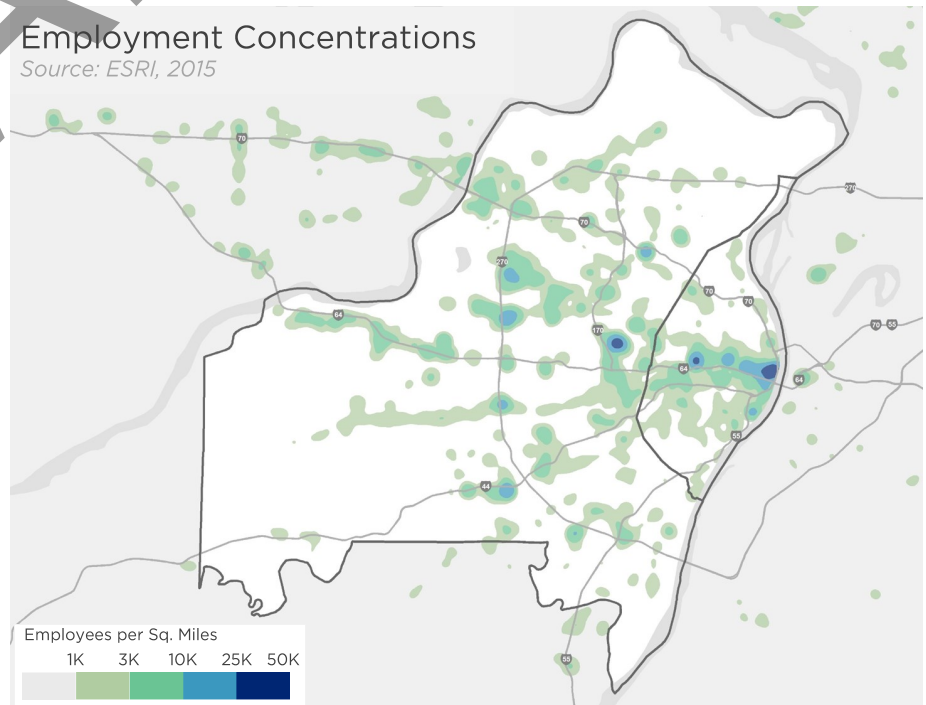
According to the U.S. Bureau of Economic Analysis, St. Louis City and County have over 1.04 million jobs representing 61 percent of total employment in the region; however, there has been a steady decline in employment in the City and County over the last 14 years after peaking at 1.07 million jobs in 2000. Additionally, the overall share of employment in the City and County compared to the rest of the MSA has generally declined annually since 1969, when they encompassed almost 73 percent of total regional employment. Much of this can be attributed to continued suburbanization of development in the region.



Employment Concentrations

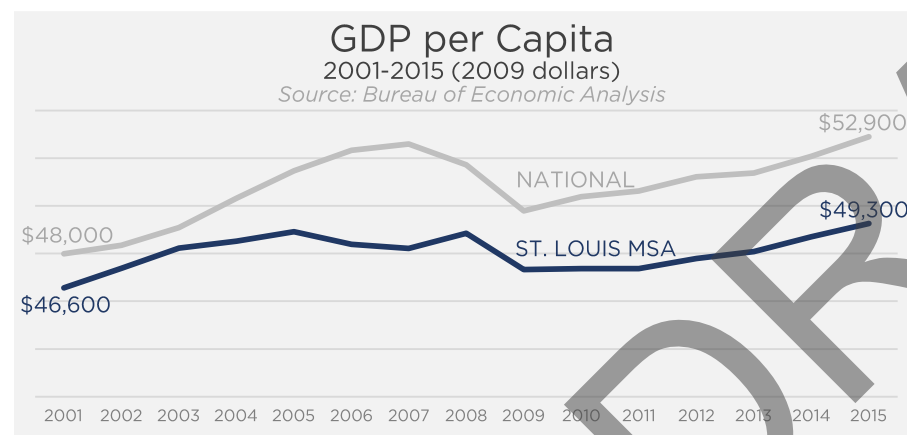
Despite losing their overall share of regional employment over the last few decades, St. Louis City and County still have the primary employment centers in the region anchored in Downtown St. Louis, Central Corridor, and Downtown Clayton, all of which have access to the region's light rail system, Metrolink, and Metrobus. Though office vacancy Downtown is relatively high at just under 15 percent (around four million square feet of available space), Downtown has added over 1,500 residential units and has had an increase in employment by almost 14 percent since 2005.

The primary employment concentration in St. Louis County is downtown Clayton, but there are also substantial concentrations of jobs along the I-270 corridor in the communities of Creve Coeur and Maryland Heights in west and northwest St. Louis County.



Gross Domestic Product (GDP)

In 2015, GDP per capita in the St. Louis region (\$49,300) was lower than the national average for metropolitan areas (\$52,900). Based on the change of GDP per capita, in the early 2000s, the St. Louis region experienced stronger-than-average growth, although national growth was much faster in the years leading up to the Great Recession. Since 2009, growth has been moderate in the St. Louis region, although as of 2015, GDP per capita surpassed pre-recession levels. Regions with higher GDP per capita tend to have more robust export industry sectors like manufacturing and professional services, as well as a larger proportion of the overall population in the labor force.



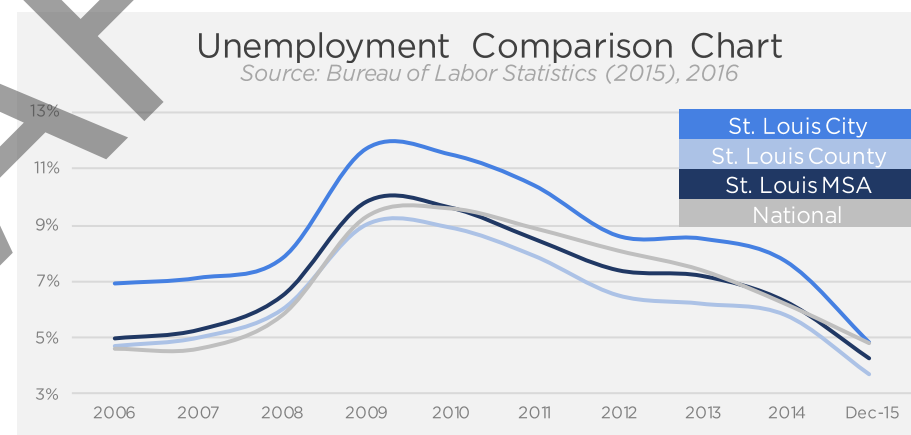
MSA (as of 2015)	GDP per capita
Minneapolis	* \$63,500
Chicago	* \$59,700
Indianapolis	* \$59,500
Milwaukee	* \$58,200
Cleveland	* \$56,000
Columbus	* \$55,000
Kansas City	* \$54,100
United States	\$52,900
Cincinnati	* \$52,600
Detroit	* \$51,400
St. Louis	\$49,300

* Peer city

Unemployment

Unemployment in the St. Louis region has generally followed national trends over the last 10 years although, as of December 2015, the unemployment rate in the St. Louis region (4.3 percent) was noticeably lower than the nation (4.8 percent). St. Louis has a slightly higher unemployment rate than most of its peer Midwestern regions, except for Milwaukee, Detroit, and Chicago.

Historically, St. Louis City has had a higher unemployment rate than the County, MSA, and nation but, as of December 2015, the unemployment rate in the City matched the nation at 4.8 percent for the first time in over 10 years.



MSA (as of Dec. 2015)	Unemployment Rate
Minneapolis	* 3.1
Kansas City	* 3.8
Cleveland	* 3.9
Columbus	* 3.9
Indianapolis	* 4.1
Cincinnati	* 4.3
St. Louis	4.3
Milwaukee	* 4.5
United States	4.8
Detroit	* 5.4
Chicago	* 5.7

* Peer city

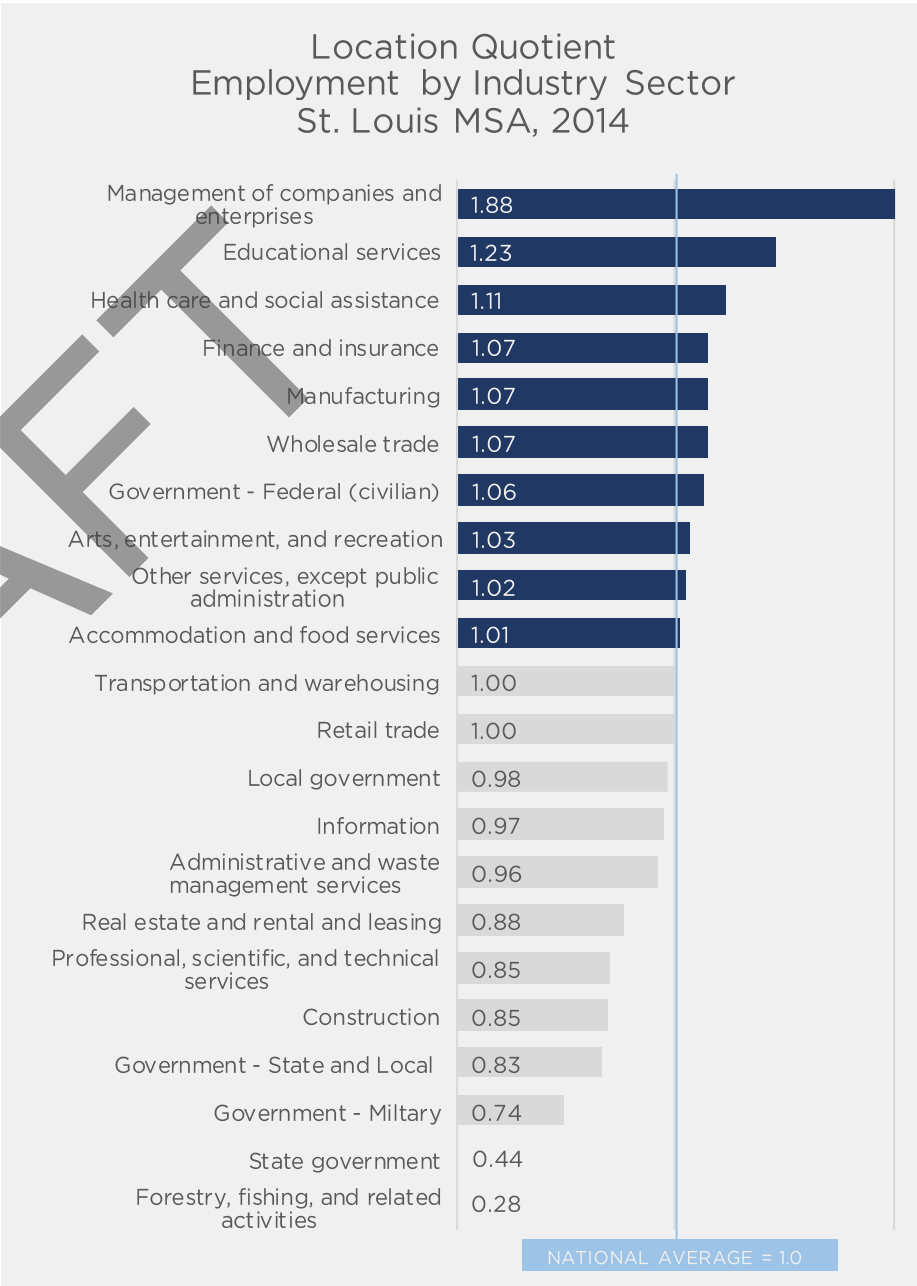
Employment Location Quotient

Based on location quotients by industry sector, the St. Louis regional economy is relatively diversified without too much reliance on a single industry sector. The region has an above average number of jobs in the *Management of Companies and Enterprises* sector (location quotient of 1.88) as a result of its strong presence of the corporate headquarters of nine Fortune 500 companies. The St. Louis region also has an above average proportion of jobs in *Educational Services* (1.23) given the concentration of major private universities, including Washington University, St. Louis University, Lindenwood University, and Webster University (employment at public universities such as University of Missouri-St. Louis or University of Southern Illinois-Edwardsville are considered the government sector).

Other key industry sectors include *Health Care and Social Assistance* (1.11) with the presence of BJC Health Care (24,000 employees) and *Financial and Insurance* (1.11), anchored by the headquarters of several major brokerage and financial services firms including Scottrade, Edward Jones, Stifel, and Wells Fargo Advisors.

Given its strategic location along the Mississippi and Missouri Rivers, the St. Louis region has been, and continues to be, a hub for shipping and manufacturing. Despite significant declines in manufacturing employment overall, losing just under 175,000 manufacturing jobs since 1969 (60 percent decrease), the St. Louis region still has a strong manufacturing base and is home to Boeing, GM Wentzville Assembly Center, and Anheuser-Busch InBev, among other major manufacturers and suppliers.

The St. Louis region still remains a strategic distribution and logistics hub as the Port of Metropolitan St. Louis is one of the busiest inland ports in terms of trip-ton miles and total volume (in tonnage) in the United States.



Source: St. Louis Regional Chamber, 2015

Top Employers

Despite the steady decline in employment in St. Louis City and County over the last decade, they are still home to the region's top employers and institutions. Of the largest 20 employers with headquarters based in the St. Louis region, 19 are located in St. Louis City or County. The region's top private employers are anchored by "Eds and Meds" sectors with major healthcare systems and hospitals including BJC Healthcare (24,100 employees), SSM Health Care (12,700 employees), Mercy Health (12,000

employees) and top research universities, including Washington University in St. Louis (14,200 employees) and St. Louis University (6,800 employees). After merging with McDonnell Douglas in 1997, Boeing Defense, Space & Security is also a major contributor to the regional economy with roughly 15,000 employees. The region also has a relatively strong biotech industry supported by the headquarters of Monsanto (5,192 employees) as well as strong concentrations of investment brokerage firms with Wells Fargo Advisors (5,400 employees) and Edward Jones (5,281 employees).

Top 20 Employers with Headquarters in the St. Louis MSA

Source: St. Louis Regional Chamber, 2016

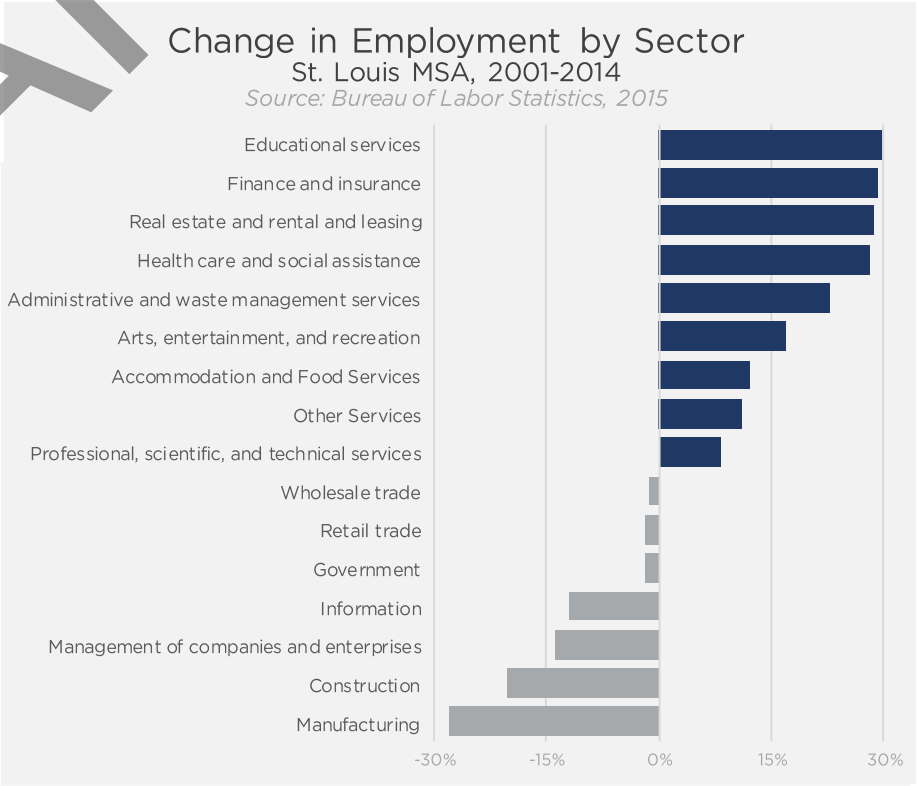
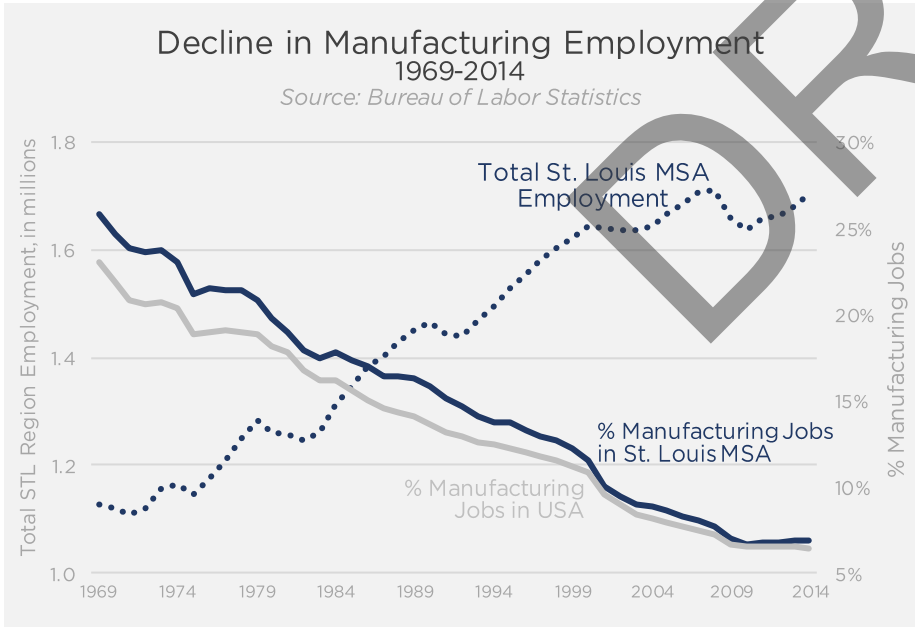
Rank	Company	County	Industry	Description	St. Louis-based Employees
1	BJC HealthCare	St. Louis City	Health Care & Social Assistance	Health Care System	24,000
2	Boeing Defense, Space & Security	St. Louis County	Manufacturing	Aerospace Manufacturing	15,000
3	Washington University in St. Louis	St. Louis County	Educational Services	Research University	14,100
4	SSM Health Care	St. Louis County	Health Care & Social Assistance	Health Care System	12,600
5	Mercy Health	St. Louis County	Health Care & Social Assistance	Hospital System	12,000
6	Schnuck Markets Inc.	St. Louis County	Retail Trade	Grocery Chain	10,800
7	Saint Louis University	St. Louis City	Educational Services	Research University	6,800
8	Enterprise Rent-A-Car	St. Louis County	Real Estate & Rental & Leasing	Auto Rental	6,800
9	Special School District of St. Louis County	St. Louis County	Educational Services	Public School System	5,700
10	Wells Fargo Advisors	St. Louis City	Finance & Insurance	Investment Brokerage	5,400
11	Edward Jones*	St. Louis County	Finance & Insurance	Investment Brokerage	5,200
12	Monsanto Co.*	St. Louis County	Manufacturing	Biotech - Agricultural Seed and Chemicals	5,100
13	Express Scripts Inc.*	St. Louis County	Wholesale Trade	Pharmaceutical Benefits Management and Dist.	4,700
14	Ameren Corporation*	St. Louis City	Utilities	Electric and Gas Utility	4,500
15	Imo's Pizza	St. Louis County	Accommodation & Food Services	Pizza chain restaurants	4,500
16	St. Louis Public Schools	St. Louis City	Educational Services	Public School System	4,400
17	Dierbergs Markets	St. Louis County	Retail Trade	Grocery Chain	4,100
18	Archdiocese of St. Louis	St. Louis City	Educational Services	Religious Organization	4,000
19	CitiMortgage	St. Charles County	Finance & Insurance	Mortgage Processing	4,000
20	St. Anthony's Medical Center	St. Louis County	Health Care & Social Assistance	Hospital System	3,700

*Fortune 500 Company

The Shifting Regional Economy

Like many regions across the Midwest, the St. Louis regional economy was anchored by a strong base in manufacturing until the middle of the 20th Century. Key industry sectors included garment and leather trades, brewing, and machinery manufacturing, specifically automobile and aerospace, with distribution networks that could leverage the region’s strategic location in the center of the United States with direct access to the Mississippi and Missouri rivers and rail networks. In fact, the St. Louis region still remains a strategic distribution and logistics hub as the Port of Metropolitan St. Louis is the second largest inland port by trip-ton miles, and the third largest by tonnage in the United States. With evolving economic trends and globalization, however, much like many of its peer cities in the Midwest, St. Louis was hit hard with the national decline in manufacturing. The manufacturing sector employed 25.9 percent of workers in the St. Louis region in 1969, but the share of manufacturing jobs has now dwindled to 6.9 percent of total employment with a net loss of almost 175,000 jobs.

Despite these challenges, the St. Louis region continues to diversify its workforce into a more service-oriented economy. From 2001 to 2014, employment in educational services, finance and insurance, real estate, and health care all increased by more than 28 percent, vastly outpacing job growth across all sectors which averaged less than four percent. Manufacturing employment declined by more than 28 percent during this time period for a net loss of almost 50,000 jobs. This presents a significant need to both attract more talent to the region and provide the proper educational and workforce development resources for existing residents since the fastest growing sectors will require a highly skilled workforce.



Four Key Industry Sectors

As part of its regional economic development strategic plan, the St. Louis Regional Chamber has identified four key industry clusters that are targeted to drive economic growth in the region.



HEALTH SCIENCE AND SERVICES

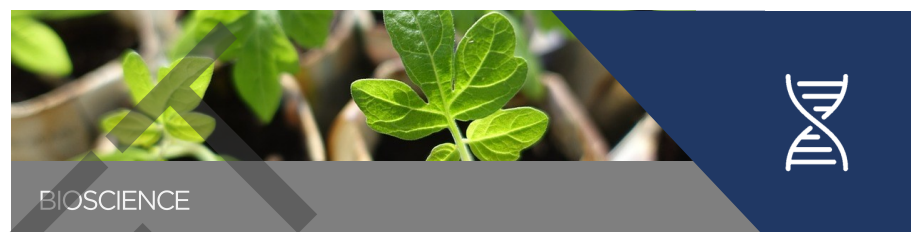
“The Health Science & Services industry in St. Louis accounts for nearly 200,000 regional jobs and represents a unique convergence of genomics, population health management, and personalized medicine. Fortune 500 companies, globally recognized research institutions, promising life science startups, and several of the nation’s leading healthcare systems and hospitals provide a fertile environment for the continued growth of this increasingly crucial industry.”



FINANCIAL AND INFORMATION SERVICES

“Greater St. Louis is emerging as one of the nation’s most concentrated locations for Financial and Information Service companies...Here you will find the headquarters for leading investment firms Edward Jones, Scottrade, Stifel and Wells Fargo Advisors. [Other major employers include] Federal Reserve Bank of St. Louis and headquarters operations for CitiMortgage, Reinsurance Group of America, Century Link Technology Solutions (formerly Savvis) and Thomson Reuters; along with the global technology operations for MasterCard.”

The following excerpts are from the St. Louis Regional Chamber’s website: www.stlregionalchamber.com



BIOSCIENCE

“Greater St. Louis has an extraordinary concentration of world-class plant & biomedical scientists, making it a world leader in academic and corporate bioscience research and development. BioSTL, which evolved from the Coalition for Plant and Life Sciences, announced a \$30 million commitment, over five years, from Washington University in St. Louis, BJC HealthCare and the St. Louis Life Sciences Project to forward bioscience company creation and drive economic growth in St. Louis.”



MULTIMODAL LOGISTICS & ADVANCED MANUFACTURING

“The St. Louis region is optimally located for 1 and 3+ distribution center models—making St. Louis ideal for companies focused on logistics, transportation and distribution, or heavily reliant on those components...Converging in St. Louis are four interstate highways and six Class-I railroads. St. Louis lies at the confluence of three major rivers – the Mississippi, Missouri and Illinois – with 14 active ports and more than 100 docking facilities extending 70 miles along the Illinois and Missouri banks.” Additionally, the Regional Advanced Manufacturing Partnership, funded through the Office of Economic Adjustment, is now working to leverage defense industry assets and create a new Advanced Manufacturing Ecosystem.

Entrepreneurship

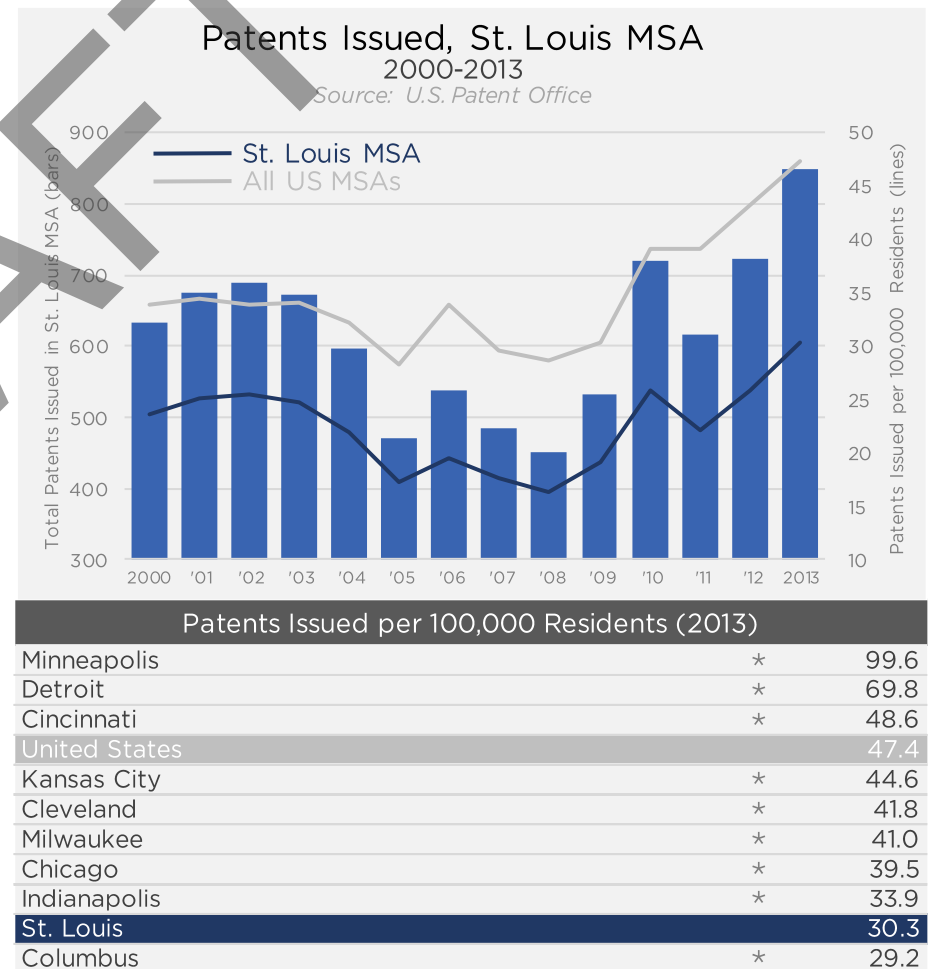
The St. Louis region continues to position itself as a hub for innovation and entrepreneurship. There is strong institutional presence with Washington University, St. Louis University, University of Missouri-St. Louis, BJC Health System, and Missouri Botanical Garden. Local industry clusters in bioscience are strong with support from the Danforth Plant Science Center, Cortex, and BioSTL, as well as forthcoming formation of a global plant science corridor. **Cortex** is a rapidly developing 200-acre mixed-use innovation district in a formerly underutilized industrial area in the City's Central Corridor that continues to flourish; full build-out is expected to create over one million square feet in facilities and 2,500 jobs. **ArchGrants**, a startup company grant program, has now awarded over \$3 million to 65 startups creating over 270 jobs in the region since 2012. **The City Foundry** mixed-use project will expand Cortex east of Vandeventer with more public focused innovation.

The region has also seen an emergence of nationally-recognized business incubators and co-working spaces devoted to creating positive and stimulating environments for innovation and entrepreneurship. Some of these spaces include **T-Rex**, a co-work space located in Downtown St. Louis that houses ArchGrants recipients and other tech-based firms, and **Cambridge Innovation Center (CIC)**, an internationally renowned co-working space founded in Cambridge, MA that recently expanded into St. Louis after being attracted to the burgeoning innovation ecosystem in the region.

This growing innovation and entrepreneurship infrastructure is starting to have a significant impact on the regional economy evident by the increasing amount of venture capital and deal flow in the region. In 2015, St. Louis had the second most venture capital deals in the Midwest and was third in total investment in the Midwest with \$254 million. A study by Mattermark listed St. Louis as one of the fastest growing startup tech regions in the country in terms of deal flow.

Patents

The St. Louis region continues to grow as a technology and innovation hub with more patents issued in 2013 (850) than the prior 13 years. The total patents issued per 100,000 residents (30) is also at its highest level in the last 13 years. On the other hand, there is still considerable room to grow as the rate of patent issuance per capita is still lower than the U.S. average for metropolitan areas (47 per 100,000 residents in 2013).



Source Brookings Export Monitor, 2015
* Peer city

Venture Capital

Another measure of entrepreneurial activity is through venture capital funding. St. Louis has positioned itself as one of the top metro areas in the Midwest for venture capital funding. Based on data from the National Venture Capital Association, in 2015, the St. Louis MSA ranked 18th in the country, and 2nd in the Midwest behind Chicago in total deal flow. The total venture capital investment of \$254 million in early stage companies in 2015 was up by over 100 percent from total venture capital investment in 2014.

Venture Capital Investment by MSA, 2015

Source: National Venture Capital Association

Rank	MSA	No. of Deals	No. of Companies	Amount Invested, in millions
1	San Francisco	942	797	\$21,043
2	New York	478	416	\$6,981
3	Boston	428	348	\$5,582
4	San Jose	379	321	\$6,238
5	Los Angeles	293	240	\$4,482
6	Seattle	110	95	\$1,172
7	Washington DC	111	93	\$924
8	Philadelphia	115	93	\$516
9	San Diego	100	83	\$1,167
10	Pittsburgh	93	83	\$199
11	Chicago	*	87	\$1,104
12	Austin	99	78	\$740
13	Atlanta	70	58	\$836
14	Denver	51	41	\$540
15	Baltimore	41	37	\$445
16	Nashville	41	34	\$136
17	Portland	41	32	\$161
18	St. Louis	41	30	\$254
19	Minneapolis	*	29	\$369
20	Boulder	29	27	\$231

* Peer city

Startups

However, despite these successful efforts to nurture more technology-oriented firms, the St. Louis region ranks relatively low in startup activity compared to other major metropolitan areas in the United States. According to the 2015 Kauffman Foundation Startup Activity Index, which measures new business creation across all industry sectors from technology companies to restaurants to dry cleaners, St. Louis ranks 38th out of the top 40 largest metro areas, decreasing by three positions from 2014. Research from the Kauffman Foundation has also indicated that thriving immigrant communities also tend to increase levels of entrepreneurship in a region.

Kauffman Foundation Startup Index

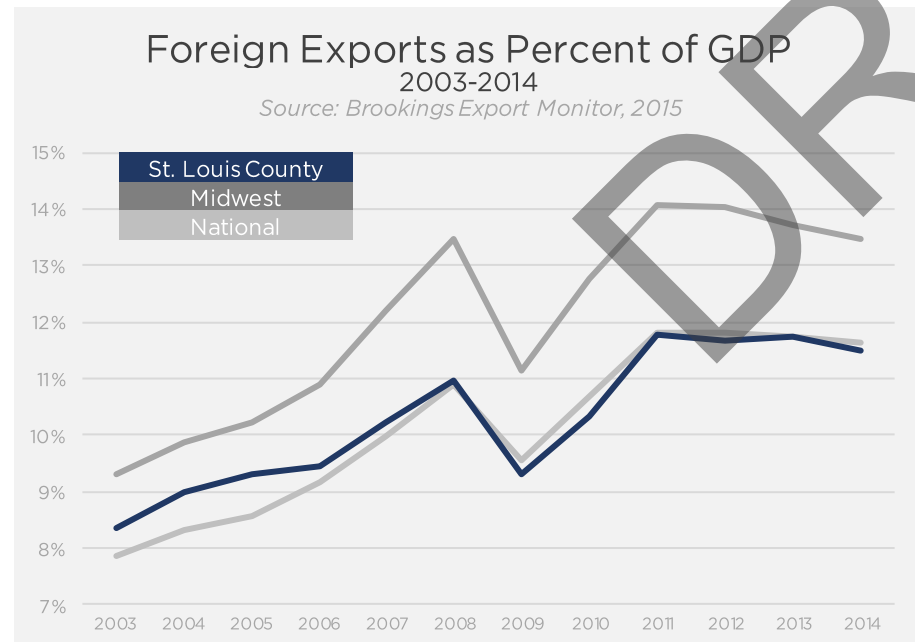
Rank	2015 MSA	Index 2015	Rate of New Entrepreneurs	Startup Density	Opportunity Share of New Entrepreneurs
1	Austin	4.29	0.55%	180.8	79%
2	Miami	4.24	0.52%	247.6	74%
3	San Jose	3.04	0.41%	168.3	91%
4	Los Angeles	2.51	0.50%	170.4	72%
5	Denver	2.01	0.37%	177.8	86%
6	San Francisco	1.57	0.39%	161.8	81%
7	New York	1.26	0.34%	197.3	81%
8	Houston	0.81	0.40%	136.9	75%
9	San Diego	0.66	0.34%	154.7	81%
10	San Antonio	0.52	0.34%	111.9	87%
12	Columbus	*	-0.03	104.0	80%
21	Chicago	*	-1.1	140.8	83%
28	Indianapolis	*	-1.76	122.1	80%
29	Kansas City	*	-1.82	137.3	76%
32	Cincinnati	*	-2.32	93.9	79%
33	Orlando	*	-2.53	196.1	73%
35	Cleveland	*	-3.05	105.9	82%
36	Detroit	*	-3.23	123.4	67%
37	Minneapolis	*	-3.75	132.1	70%
38	St. Louis	-4.14	0.16%	126.6	67%
39	Milwaukee	*	-4.25	100.9	75%

* Peer city

Exports

According to the Brookings Institution, increases in international trade have been attributed to the nation's recovery from the Great Recession with exports accounting for 27 percent of overall economic growth from 2008 to 2014 and a total value of over \$2 trillion. Though manufacturing was once the primary driver of foreign exports, natural resources and commodities have driven foreign export growth since 2008. The St. Louis region's exports as a percentage of GDP have been relatively consistent with national trends since 2003, although it lags behind the average for the Midwest. Exports in the St. Louis region are primarily aircraft products and parts (12.1 percent of total exports) and motor vehicles (10.3 percent of total exports), which are driven by production at Boeing and GM's Wentzville Plant.

Recognizing the need to promote foreign exports in the region, the St. Louis World Trade Center recently developed the Metro St. Louis Export Plan (2016), through the support of the Global Cities Initiative (Brookings/JPMorgan Chase).



Regional economies with a strong base in manufacturing (especially aircraft and motor vehicles) and natural resources (especially petroleum- and gas-related industries and metals) tend to have the largest share of their GDP supported by foreign exports. The top regions include Baton Rouge (oil and gas), Wichita (aircraft), New Orleans (oil and gas), and Ogden (metals). More concerning for the St. Louis region is that the annualized increase in the value of foreign exports only increased by 0.3 percent from 2008 to 2014 ranking 76th in the United States and lower than all of its peer Midwestern regions.

Exports		
(Value of Exports as Percentage of GDP)		
1	Baton Rouge	31.7%
2	Wichita	24.2%
3	New Orleans	23.9%
4	Ogden (UT)	19.6%
5	Houston	19.4%
6	Seattle	19.1%
7	Portland	17.9%
8	Greenville (SC)	17.5%
9	Detroit	17.5%
10	Greensboro (NC)	17.5%
18	Indianapolis	* 13.3%
24	Cincinnati	* 11.9%
26	Cleveland	* 11.7%
	United States	11.6%
29	Milwaukee	* 11.6%
31	St. Louis	11.5%
34	Chicago	* 11.3%
56	Minneapolis	* 9.6%
71	Columbus	* 8.8%

Export Growth		
(Annualized Increase in Value of Exports 2008-2014)		
1	Baton Rouge	4.5%
2	Provo (UT)	3.8%
3	Austin	3.7%
4	Houston	3.2%
5	Portland	3.2%
6	Nashville	3.0%
7	El Paso	2.5%
8	Des Moines	2.5%
9	Ogden (UT)	2.5%
10	McAllen (TX)	2.5%
11	United States	2.4%
22	Columbus	* 1.9%
31	Indianapolis	* 1.5%
35	Minneapolis	* 1.3%
38	Cincinnati	* 1.2%
54	Milwaukee	* 0.9%
56	Chicago	* 0.8%
58	Cleveland	* 0.7%
62	Kansas City	* 0.7%
76	St. Louis	0.3%

* Peer city

HOUSING

Median Housing Values

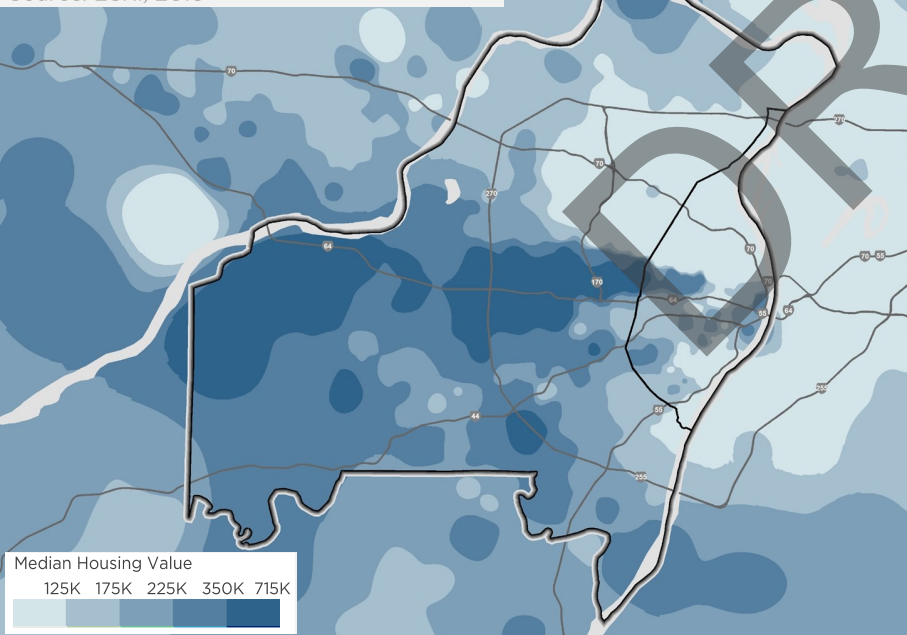
Consistent with median household income, median housing values in St. Louis County are higher than in the City, region, and nation. The spatial distribution of property values, however, shows significant disparities depending on the sub-region. Median housing values along the I-64 corridor in West County are more than \$350,000, while most of Inner North County and North City have housing values well-below \$125,000.

St. Louis City	\$154,313
St. Louis MSA	\$187,166
St. Louis County	\$206,365
United States	\$200,006

Source: ESRI, 2015

Median Home Value

Source: ESRI, 2015



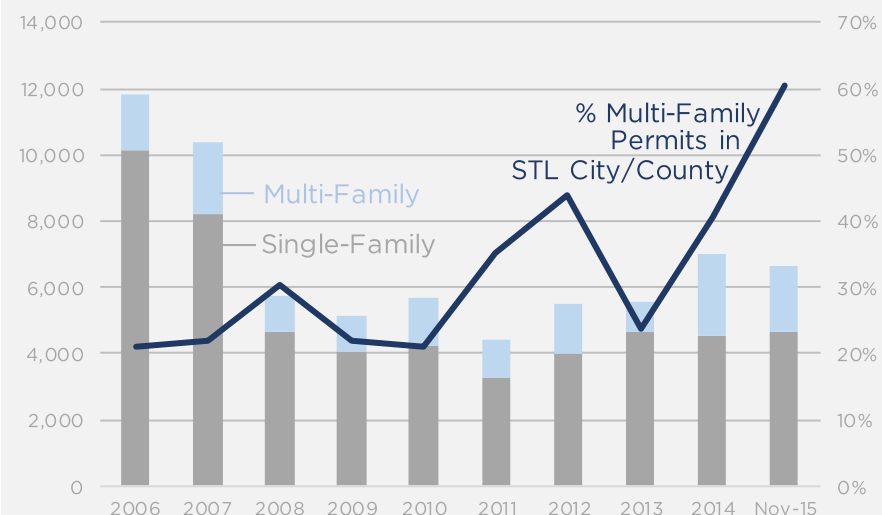
Building Activity

Building activity in the St. Louis region has generally increased since 2011 based on total building permits issued for housing, but the pace of development is still nowhere near pre-recession levels. However, despite declining population in St. Louis City and County, in 2015 (through November), the City and County combined to account for over 30 percent of total permits for housing units in the region. More importantly, the City and County accounted for more than 60 percent of the regional building permits issued for multi-family housing indicating a strong increase in higher-density infill residential building activity.

Given the slow employment and population growth in the St. Louis region, it is lagging behind other comparable metro regions in terms of overall housing starts.

St. Louis MSA Building Permits 2006 - Nov. 2015

Source: U.S. Dept. of Housing and Urban Development (2015), 2016

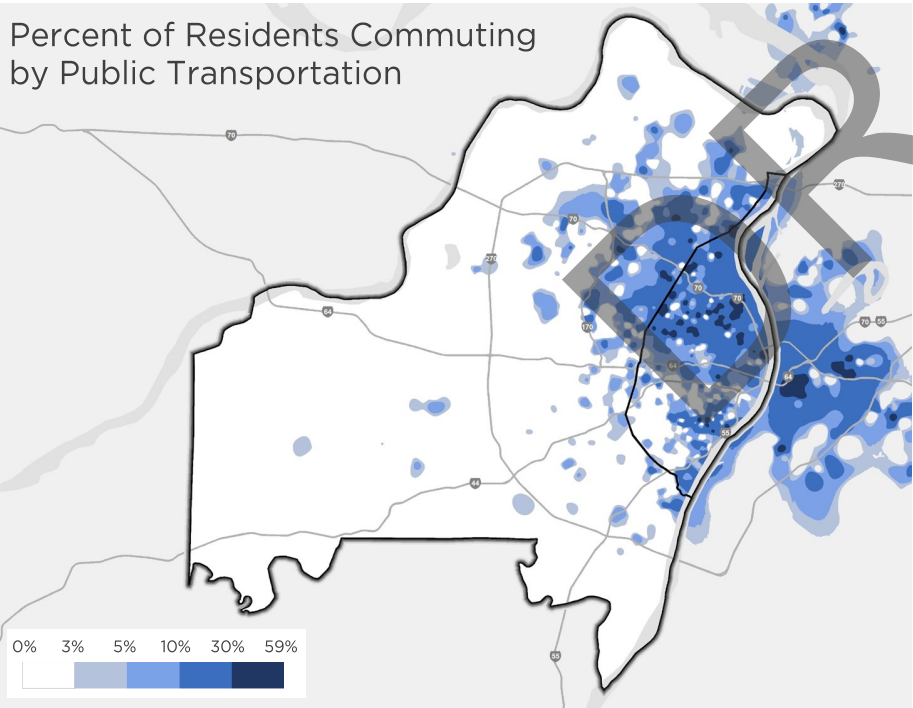


TRANSPORTATION & INFRASTRUCTURE

Commuting Data

The primary mode of transportation for commuting in the region is by automobile with 83 percent of commuters who “drove alone” according to the American Community Survey, which is higher than the national average (76 percent). However, the use of public transportation is significantly higher for St. Louis City with 10 percent of residents using public transportation, higher than the County (two percent), region (two percent) and national average (five percent). Given the existing public transportation infrastructure in St. Louis City and parts of St. Louis County, it is critical that future development offers opportunities for multi-modal transportation by leveraging existing infrastructure. Providing efficient public transportation is also critical from a social equality and upward mobility perspective—a much higher percentage of North City and Inner North County households commute via public transportation than other parts of the County and region.

Percent of Residents Commuting by Public Transportation



In many ways, the efficiency of the regional arterial networks has been a contributor to continued sprawl and fragmentation of development in the St. Louis region. The St. Louis region is ranked 9th in terms of total vehicle miles traveled per capita, yet 41st in terms of annual delays per auto commuter. Given the effectiveness of traffic flow, there is less incentive for households to live closer to employment centers or employers limiting demand for higher-density residential development.

Vehicle Miles Traveled per Capita

Average daily vehicle miles traveled per capita on freeways and arterials, 2011

Source: *Where We Stand, 7th Ed., East West Gateway, 2015*

1	Oklahoma City	24.1
2	Houston	23.1
3	Indianapolis	* 23.1
4	Nashville	23.0
5	Richmond	22.4
6	Raleigh	22.0
7	Kansas City	* 21.4
8	Charlotte	21.4
9	St. Louis	21.3
10	Atlanta	21.3
11	Columbus	* 21.2
15	Detroit	* 20.6
23	Minneapolis	* 19.7
27	Cincinnati	* 19
32	Cleveland	* 18.1
37	Cincinnati	* 18.1
38	Milwaukee	* 17.8
48	Chicago	* 13.3

* Peer city

Public Transportation

Transit service in St. Louis City and County is provided by Metro Transit, governed by the Bi-State Development Agency, which includes MetroLink (light rail), MetroBus, and Metro Call-A-Ride. Metro Link includes 37 stations across the region providing direct access to the region's primary employment centers in Downtown St. Louis, Central Corridor (BJC Healthcare and Cortex), Washington University, and Downtown Clayton as well as Lambert-St. Louis International Airport.

Based on the latest data from the National Transit Database, transit ridership in the region increased by 16 percent from 2010 to 2013, although total ridership is still below 2009 levels. Total ridership peaked at over 54 million in 1998, while ridership was 47 million in 2013. This decline can be attributed to population losses in St. Louis City during this time period and continued suburban development and population growth in areas with limited public transportation access.

Annual Delay per Auto Commuter

Average hours lost due to congestion per auto commuter, 2011

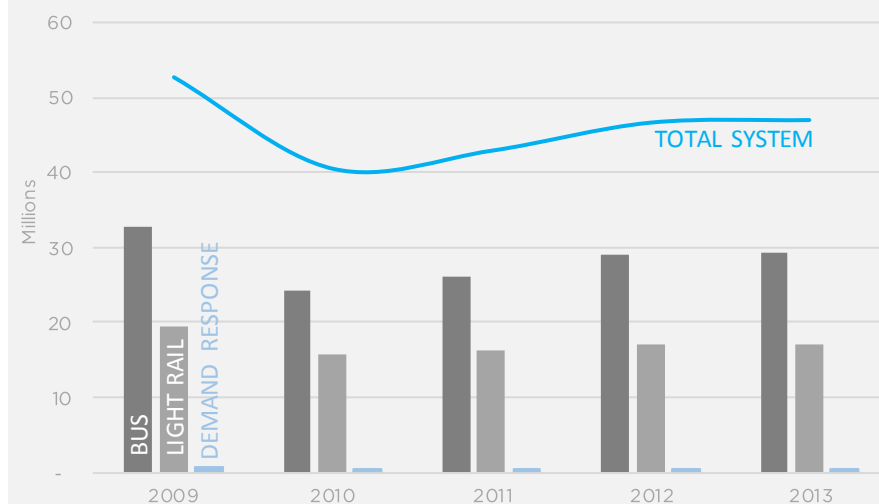
Source: *Where We Stand, 7th Ed., East West Gateway, 2015*

1	Wash. DC	67
2	Los Angeles	61
3	San Francisco	61
4	New York	59
5	Boston	53
6	Houston	52
7	Atlanta	51
8	Chicago	*
9	Philadelphia	48
9	Seattle	48
20	Indianapolis	*
22	Columbus	*
22	Detroit	*
33	Cincinnati	*
38	Minneapolis	*
41	Cleveland	*
41	St. Louis	31
47	Milwaukee	*
49	Kansas City	*

* Peer city

MetroTransit Ridership Data St. Louis MSA

Source: *National Transit Database (2014), 2016*



Air Travel

The St. Louis region has five major airports; the two busiest are located in St. Louis City and County: Lambert-St. Louis International Airport and Spirit of St. Louis Airport. The other three, St. Louis Downtown Airport, St. Louis Regional Airport, and MidAmerica St. Louis Airport, are located in Illinois.

Lambert-St. Louis International Airport is the 32nd busiest airport in the U.S. in terms of passenger enplanements (boardings). Since its peak in 2000 with 15.3 million passenger enplanements at the airport has now dropped by almost 140 percent to 6.4 million in 2015. In 2000, Lambert-St. Louis International Airport was the 15th busiest in the County behind JFK International in New York. In order to increase visibility for the region, the Airport Commission, St. Louis Mayor and Board of Alderman recently approved to change the name of the airport to “St. Louis-Lambert International Airport” effective January 2017. The airport is currently in the process of formally changing the name with the Federal Aviation Administration (FAA).



LAMBERT-ST. LOUIS INTERNATIONAL AIRPORT



Freight

St. Louis has the existing infrastructure and strategic geographical assets to maintain and expand its positioning as a major shipping, transportation, and logistics hub. The region is located at the confluence of the nation's two longest rivers (Missouri and Mississippi) serving the Port of Metropolitan St. Louis, the nation's second largest inland port by trip-ton miles. The St. Louis region is also at the junction of four interstates (I-44, I-55, I-64, and I-70) and has rail infrastructure supporting six Class I railroads that can utilize intermodal port facilities. Additionally, St. Louis is strategically located within 300 miles of seven other major metropolitan areas, including Chicago, Kansas City, Indianapolis, Memphis, Louisville, Nashville, and Des Moines. In 2012, St. Louis was ranked 11th in the country in total freight tonnage and ranked 16 in total freight value.

The St. Louis Regional Freightway was formed in 2016 as a public-private partnership to optimize how the region coordinates and manages freight traffic by air, rail, road, water, and pipeline and set a framework for planning, marketing, and advocacy of the region as a national freight hub.

Freight Tonnage

Amount of freight imported to, exported from, or shipping within the region in thousands of tons, 2012

Source: *Where We Stand, 7th Ed., East West Gateway, 2015*

1	Houston	1,114,885
2	Los Angeles	892,421
3	New York	864,781
4	Chicago	799,804
5	New Orleans	490,251
6	San Francisco	488,382
7	Dallas	435,366
8	Philadelphia	435,353
9	Detroit	375,677
10	Atlanta	372,690
11	St. Louis	341,863
13	Minneapolis	318,213
20	Indianapolis	203,196
22	Cleveland	195,675
25	Kansas City	188,285
28	Cincinnati	167,571
31	Columbus	157,224
39	Milwaukee	115,183



GOVERNANCE / KEY ORGANIZATIONS

St. Louis County Stlouisco.com

As the hub of the St. Louis metropolitan area, St. Louis County plays a vital role in the regional economy and provides a significant share of Missouri's statewide employment. As the most populous county in Missouri, and population and economic center of the St. Louis metropolitan area, St. Louis County plays a crucial role in the state's and region's vitality.



City of St. Louis Stlouis-mo.gov

The City of St. Louis harnesses the strength and spirit of its diverse community to create an economically, socially and ecologically vibrant City for present and future generations; one that dynamically serves those who live, work, and play in the City's rich and celebrated historic landscape.



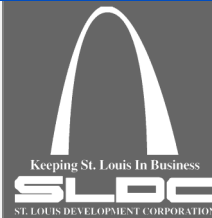
St. Louis Economic Development Partnership Stlpartnership.com

The Partnership provides a broader range of services than most agencies of its kind, boosting innovation and entrepreneurship, attracting and retaining companies, increasing the region's international reach, and revitalizing municipalities. It is a key facilitator of regional growth for businesses and communities throughout the St. Louis Metropolitan area and is grantee of EDA's Revolving Loan Fund.



St. Louis Development Corporation Stlouis-mo.gov/sldc

SLDC is an umbrella, not-for-profit corporation with the mission of fostering economic development and growth in the City of St. Louis by stimulating the market for private investment in City real estate and business development and improve the quality of life for everyone who lives in, works in, and visits the City. SLDC is also a grantee of EDA's Revolving Loan Fund.



St. Louis Regional Chamber Stlregionalchamber.com

The chamber convenes leaders throughout the bi-state region to get big things done, develops and champions public policy to enhance the region's business climate and livability, and works in specific economic sectors to help companies startup, expand, or move to St. Louis.



Greater St. Louis Economic Development Network Stlregionalchamber.com/who-we-are/regional-partners

The Network is a collaborative group of over 100 economic developers with success in regional economic development tied directly to its ability to work collaboratively throughout the region with many City and County partners, coming together as The Regional Economic Development Network.

East-West Council of Governments Ewgateway.org

East-West Gateway is the metropolitan planning organization for the area. The federal government and states have vested legal authority in the agency for developing and adopting plans for the region's surface transportation system. East-West Gateway provides a forum for local governments to work together and solve problems.



Downtown STL Downtownstl.org

Downtown STL is the catalyst for creating and promoting a Downtown that attracts investment, economic activity and vibrancy at the hub of the region. Downtown STL also manages the Downtown St. Louis Community Improvement District that provides enhanced services to make Downtown St. Louis a cleaner, safer and more inviting place.



Lambert-St. Louis International Airport

Flystl.com

Lambert-St. Louis International Airport is vital to the region's economic health, connects St. Louis to the rest of the world, and contributes to quality of life. More than 12 million people travel through Lambert-St. Louis annually and it generates \$3.6 billion in economic impact, making Lambert-St. Louis one of the area's greatest assets.



St. Louis Community College

Stlcc.edu

St. Louis Community College is the largest community college district in Missouri and one of the largest in the United States. St. Louis Community College recognizes the dignity and worth of all human beings and believes that postsecondary education should be available to all who can benefit from it.



Bi-State Development

Bistatedev.org

Bi-State Development is an interstate compact agency existing pursuant to an agreement between the states of Missouri and Illinois and created by an act of the United States Congress. Its business operations include the Gateway Arch Riverfront, Metro Transit, St. Louis Downtown Airport, Regional Freight District, and Bi-State Development Research Institute.



St. Louis County Municipal League of Metro St. Louis

Stlmuni.org

With nearly 100 years in service promoting stronger local government, the League is the official advocacy organization for municipalities in metro St. Louis. The League fosters collaborations with municipal officials, other government organizations and business leaders to link communities and strengthen local government for the benefit of the region.



World Trade Center St. Louis

Worldtradecenter-stl.com

World Trade Center St. Louis (WTC) is a membership organization formed in 1993 to promote international trade and business in the St. Louis region as well as most of Missouri and Southern Illinois. WTC is certified by the World Trade Centers Association (WTCA) and provides trade education, international market research, networking, and other businesses services.



Beyond Housing

Beyondhousing.org

Beyond Housing is a comprehensive community development organization convening partners and providing leadership. From purchasing a home to health, education, jobs, and economic development, it offers holistic resources and support. By using the school district boundaries, it aligns resources and partners around a specific area of help.



RISE

Risestl.org

Rise is a leading nonprofit organization that connects key groups, working to revitalize communities and neighborhoods in Greater St. Louis. Rise acts as a resource and partner to the community, bringing together non-profit organizations, financial institutions and government to make successful neighborhood revitalization possible.



St. Louis Agency on Training and Employment

Stlouis-mo.gov/government/departments/slate

SLATE is dedicated to employment and job training services for job seekers with barriers to employment and support for businesses looking to hire a diverse workforce. SLATE Missouri Career Center (SLATE MCC) provides training and job placement services to the St. Louis City's adult workforce.



North County Incorporated

Northstlouiscounty.com

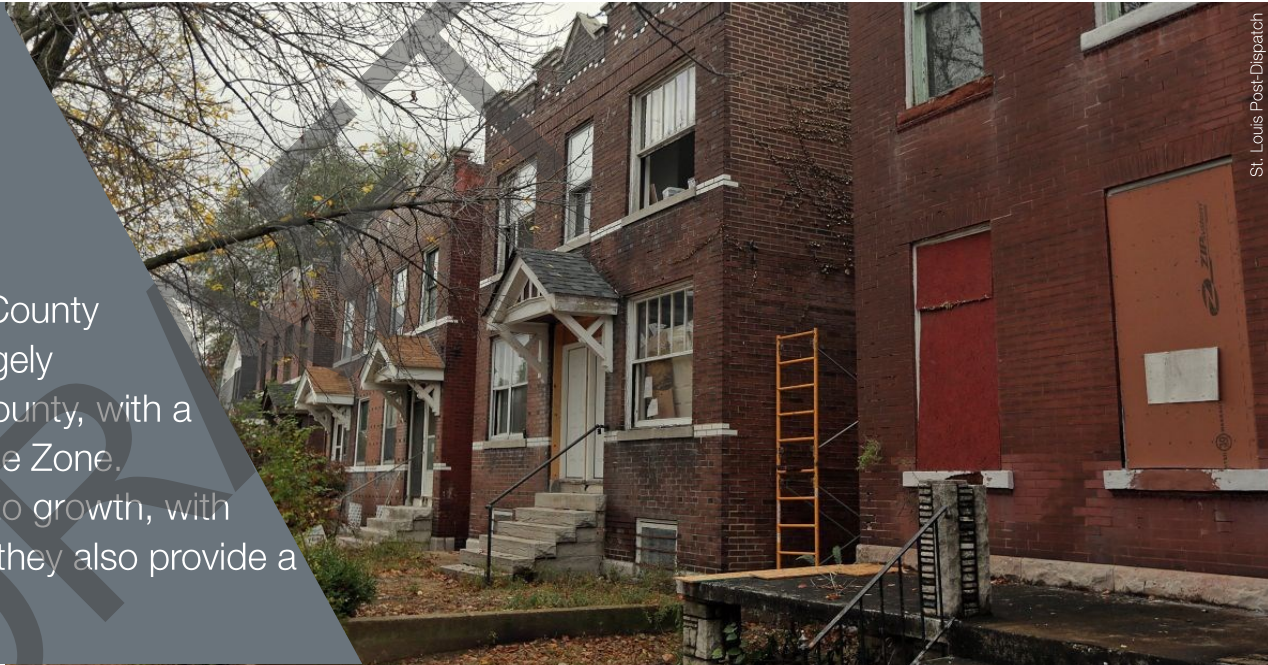
North County Incorporated is a regional development organization, which acts as a catalyst to define and advocate economic and community development for North St. Louis County. North County Incorporated was founded in 1977 and represents the 47 municipalities and unincorporated area in North St. Louis County.



SECTION 2

DISTRESSED PROPERTIES PROBLEMS AND SOLUTIONS

Roughly a quarter of the parcels in St. Louis City and around eight percent of parcels in St. Louis County are considered distressed. These parcels are largely located in North St. Louis City and Inner North County, with a Particular concentration in the designated Promise Zone. Though these parcels can be viewed as barriers to growth, with the proper funding, programs, and coordination, they also provide a tremendous opportunity for new development.



Overview

Based on available information from St. Louis City and St. Louis County, the accompanying “Summary” table provides an approximation of the number of land parcels and associated acreage that are vacant, contain vacant buildings, are in foreclosure, or are tax delinquent. Collectively, these parcels are considered “distressed” because they are not contributing to the economy and tax bases of the City and County as much as they could.²

Roughly a quarter (23.5 percent) of the parcels in the City of St. Louis and 12.6 percent of the City’s acreage are classified as distressed property. For St. Louis County, 8.3 percent of parcels and 9.7 percent of the acreage of the readily developable land are considered distressed.³

It is important to note that the parcels and acreage are for the entirety of St. Louis City and County. However, as indicated on the accompanying maps, the distressed properties are largely located in North St. Louis City and County, with a particular concentration in the designated Promise Zone.

While the significant amount of land in St. Louis City and County that is vacant, contains vacant buildings, or has property that is tax delinquent or is in foreclosure, is a deterrent to economic development, it also represents a very important economic opportunity, assuming a series of issues can be addressed.

² That said, the present inventory, as presented on the summary table, appears to be incomplete and/or inaccurate to a sufficient degree that warrants continued research and documentation by relevant planning agencies. That is, the inventory of distressed properties, and policy implications that derive therefrom, would benefit by immediate field verification as well as routine (at least annually) updates and subsequent reports to the public.

³ Excludes floodplain land and land in the steep Ozark Plateau of west St. Louis County.

Update and Verification of Conditions

While the information available from St. Louis City and County provides a picture of the general quantity and location of distressed properties, it is in need of updating and verification. In particular, field verification of current vacancy, and especially the condition of vacant buildings, are needed to facilitate the planning and reuse of distressed properties. The City of St. Louis engaged a site inspection consultant to evaluate at least some of its vacant properties in early 2016, but an expanded effort to include all City properties, particularly commercial properties that are not tracked, is even more desirable.

St. Louis County, with nearly 400,000 parcels of land in 90 municipalities and unincorporated areas, currently has no single method for documenting vacant and distressed properties. However, a variety of data is collected, including tax delinquent properties, nuisance properties (in unincorporated areas), and vacancies using U.S. Postal address data to track countywide trends and concentrations. Some municipalities maintain their own inventories, including those that require vacant properties to be registered. A more comprehensive system to identify and collect information about distressed properties in St. Louis County would be beneficial.

An important focus of the distressed properties field inspection for both the City and County would be to identify vacant structures that could be rehabilitated and structures that are deemed too deteriorated that could be demolished to make way for future redevelopment. In addition, it would be useful to identify distressed properties with potential environmental problems. That said, St. Louis County recently produced a map illustrating all the brownfield development sites in the Promise Zone on behalf of the St. Louis Economic Development Partnership. While the National Priorities List and the Missouri Hazardous Substance Site Locator provide lists of known environmental problems, they are typically limited to the worst cases. Research on the remaining properties, to identify previous uses that could contribute to the need for environmental cleanup, or vacant properties where all materials from demolition were not removed from the sites, would be useful in determining the future redevelopment potential of the properties.

Property Consolidation and Preparation for Reuse

While the acreage of distressed properties is substantial, much of the portfolio is made up of small properties that are not contiguous or are privately owned. Therefore, it would be useful to identify locations where acquisition of additional property, when added to publically owned property, could create viable redevelopment opportunities. Once these redevelopment opportunities are determined and prioritized, a source for funding desired acquisition needs to be established.

A second component of preparing properties for reuse would involve the demolition of vacant buildings and the elimination of environmental problems. The City of St. Louis has a program for demolishing dilapidated buildings but funding to address all the needed demolition is inadequate. St. Louis County has limited funding for demolitions. Therefore, additional funding is needed to prepare property for redevelopment.

Coordination with Other Planning and Development Efforts

When combined with other programs in St. Louis City and County, the portfolio of vacant and distressed properties can provide an important resource for the implementation of these programs or can take advantage of the planning efforts to enhance the development opportunities presented by vacant and distressed properties. A major opportunity would involve the federally mandated \$4.7 billion Metropolitan Sewer District (MSD) Project Clear, which is intended to improve water quality and alleviate many wastewater concerns created by storm water runoff and combined sewers. MSD is looking at vacant land as a way of capturing and reducing runoff problems. As part of this effort, the City and County would like to have MSD look at creating open space as an amenity that could help catalyze development, in addition to simply looking for an engineering solution. One way to foster a coordinated approach would be to create a demonstration

project that could help the understanding of how such an approach could be utilized on a broader scale.

A related opportunity would be to establish a program similar to wetland mitigation, where valuable sites that it would be advantageous to accommodate more development intensity could utilize vacant land in the same watershed for runoff storage.

Vacant and distressed property can also play an important role in contributing to and leveraging a number of ongoing planning and development efforts, including:

- Numerous development efforts in north City and County – the Federal Promise Zone, Strong Cities Strong Communities (SC2), the location of the National Geospatial-Intelligence Agency (NGA) West, the NorthSide Regeneration Redevelopment Area, the North Riverfront Open Space & Redevelopment Plan, the North Riverfront Commerce Corridor Plan, Choice Neighborhoods, EcoDistrict 2015, the 24:1 Community Initiative Plan, and the Ferguson Commission report.
- Transit-Oriented Development around MetroLink stations.
- Implementation of the Great Rivers Greenways regional master plan.
- Implementation of the St. Louis Regional Freight District plan.

Highest and Best Use Analysis

The vacant and distressed land can potentially be used for a variety of purposes. However, not all uses will be of equal benefit for the economic development of St. Louis City and County. Before the sale of publicly owned land or public acquisition of privately owned land to create viable development sites, an analysis of the highest and best use of the property should be undertaken to provide a framework for a disposition strategy and a guide for the potential partnering with viable private sector development or other public sector joint development programs, such as the ones mentioned above.

Summary

Vacant Parcels, Parcels with Vacant Buildings, Properties in Foreclosure and Tax Delinquent Properties
St. Louis City and St. Louis County

	ST. LOUIS CITY	ST. LOUIS COUNTY DEVELOPABLE	ST. LOUIS COUNTY TOTAL	CITY AND COUNTY TOTAL
VACANT PARCEL				
Number	16,496	15,556	20,119	36,615
% of Total Parcels	12.8%	4.2%	5.4%	7.3%
Acres	1,916	16,236	53,038	54,954
% of Total Acres	6.3%	6.4%	18.4%	17.2%
PARCEL WITH VACANT BUILDING				
Number	6,635	12,932	12,932	19,567
% of Total Parcels	5.2%	3.5%	3.5%	3.9%
Acres	825	7,269	7,269	8,094
% of Total Acres	2.7%	2.9%	2.5%	2.5%
TOTAL PARCELS WITH VACANT LAND AND BUILDINGS				
Number	23,131	28,488	33,051	56,182
% of Total Parcels	18.0%	7.8%	8.9%	11.2%
Acres	2,741	23,505	60,307	63,048
% of Total Acres	8.9%	9.3%	20.9%	19.7%
PROPERTY IN FORECLOSURE				
Number	277	716	716	993
% of Total Parcels	0.2%	0.2%	0.2%	0.2%
Acres	37	211	211	248
% of Total Acres	0.1%	0.1%	0.1%	0.1%
TAX DELINQUENT PROPERTIES				
% of Total Parcels	6,899	1,352	1,352	8,251
% of Total Parcels	5.4%	0.4%	0.4%	1.6%
Acres	1,094	786	786	1,880
% of Total Acres	3.6%	0.3%	0.3%	0.6%
VACANT PARCEL, BUILDING, FORECLOSURE AND DELINQUENT				
% of Total Parcels	30,307	30,556	35,119	65,426
% of Total Parcels	23.5%	8.3%	9.4%	13.1%
Acres	3,872	24,502	61,304	65,176
% of Total Acres	12.6%	9.7%	21.2%	20.4%
ALL OTHER PARCELS EXCLUDING PUBLIC OPEN SPACE				
Number	98,125	336,619	336,619	434,744
% of Total Parcels	76.2%	91.6%	90.5%	86.8%
Acres	23,432	204,018	204,018	227,450
% of Total Acres	76.5%	81.0%	70.7%	71.2%
PUBLIC OPEN SPACE				
Number	398	412	412	810
% of Total Parcels	0.3%	0.1%	0.1%	0.2%
Acres	3,324	23,425	23,425	26,749
% of Total Acres	10.9%	9.3%	8.1%	8.4%
TOTAL PARCELS				
Number	128,830	367,587	372,150	500,980
Acres	30,628	251,945	288,747	319,375

Source: Development Strategies, 2016

SECTION 3

DISASTER AND RESILIENCY

In the St. Louis region, disaster recovery is typically associated with flooding or tornado damage, but the region must also be prepared for a number of man-made disasters, including replacing aging and potentially hazardous infrastructure, responding to economic shocks such as major layoffs or recession, or addressing civil unrest as what was experienced after the shooting of Michael Brown in Ferguson. Fortunately, a number of steps have been taken to ensure the region is well-prepared for the unexpected.



Disaster and Economic Recovery and Resiliency Assessment and Planning

The St. Louis region has its share of vulnerabilities to disasters, both natural and man-made. The region's location at the confluence of two major rivers and proximity to the New Madrid Seismic Zone and the Central Plains region bring heightened risks of flooding, earthquakes, and tornadoes. Shifting climate patterns have increased average temperatures and led to more days of extreme heat. Aging infrastructure and hazardous waste sites introduce the danger of accidents with far-reaching consequences. And the intricacies of our modern economy and political system make the possibility of losing a major employer or experiencing a period of civil unrest ever-present.

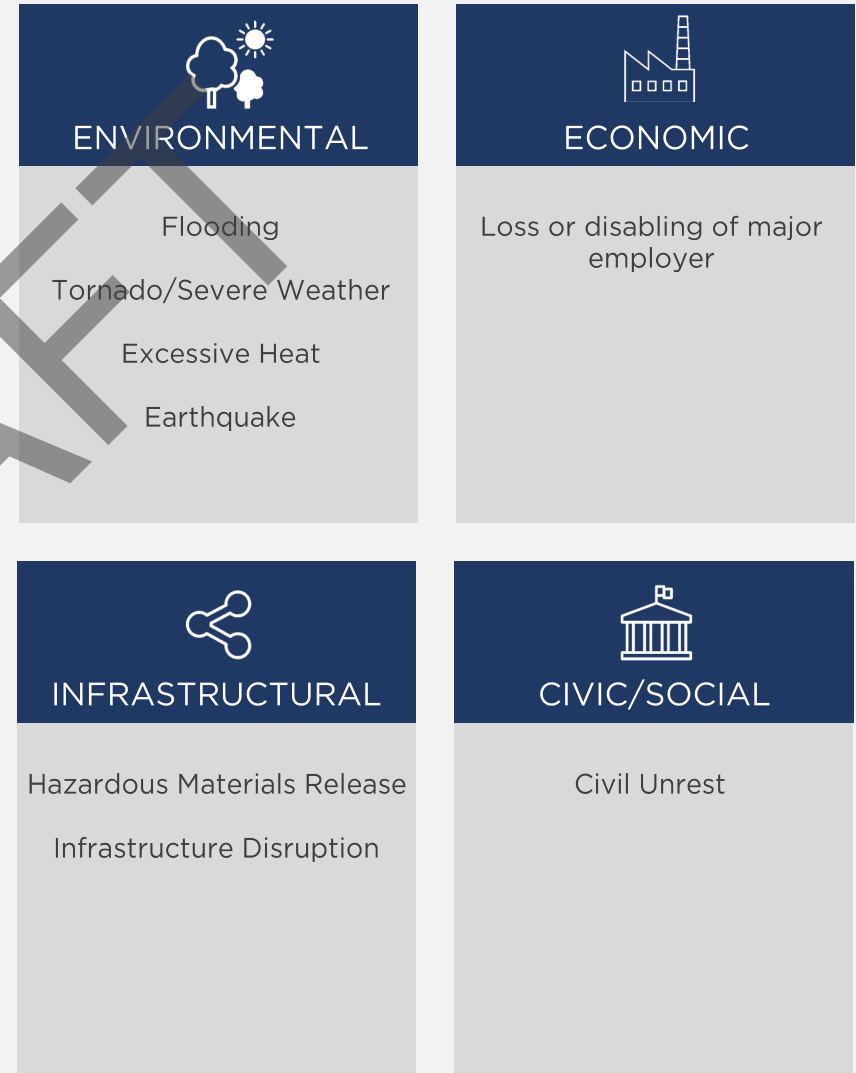
In the face of these vulnerabilities, the St. Louis region has demonstrated a strong commitment to collaboration and coordination in mitigating the risk of, preparing for, and responding to potential incidents. Regional plans and programs have been put in place to bring together disparate systems and educate both leaders and the public on how to be prepared and resilient. The St. Louis Economic Development Partnership (SLEDP) has an important role to play in supporting and implementing these plans and programs, in order to keep the region's businesses and workforce safe, strong, and prepared to recover from any and all of these threats.

In describing the concept of economic resilience, the US Economic Development Administration writes,

"In building economic resilience, it is critical that economic development organizations consider their role in the pre- and post-incident environment to include steady-state and responsive initiatives. Steady-state initiatives tend to be long-term efforts that seek to bolster the community or region's ability to withstand or avoid a shock. Responsive initiatives can include establishing capabilities for the economic development organization to be responsive to the region's recovery needs following an incident."

Building resiliency should therefore be approached through a combination of initiatives that respond to incidents and those that prevent or bolster communities against such incidents.

Major Vulnerabilities



Sources: St. Louis Regional Hazard Mitigation Plan Update for 2015-20 (EWG); St. Louis Metropolitan Area Risk Assessment, August 2009 (STARRS)

Hazard Mitigation

The 2015-2020 St. Louis Regional All Hazard Mitigation Plan⁴ was developed by the East-West Gateway Council of Governments on behalf of the City of St. Louis and St. Louis, Franklin, Jefferson, and St. Charles counties. As described by East-West Gateway, the plan “is designed to help protect public safety and prevent loss of life or injury in the event of a natural disaster. It is also designed to reduce risk to existing and future development and to prevent damage to each community’s unique economic, cultural and environmental assets.”

The Plan includes strategies for increasing public information and awareness for mitigating natural disasters, general hazard mitigation, and specific mitigation of the highest risk natural disasters. These action items can be found in Chapter Four of the Plan. Among the strategies are actions that increase the resiliency of communities and the built environment, including:

- Joint purchases of supplies and equipment across municipalities;
- Protection of stream buffers from development;
- Use of floodplain best management practices;
- Stormwater management through the use of green infrastructure;
- Use of buy out programs for properties in frequently flooded areas;
- Updating building codes; and,
- Improving the structural integrity of dams;

The SLEDP’s action plan addresses a number of these strategies, particularly in encouraging maintenance of existing infrastructure, infill development, and the Clean and Green green infrastructure program.

⁴ 2015-2020 St. Louis Regional All Hazard Mitigation Plan can be found at http://www.ewgateway.org/ProgProj/Emergency_Response/HazMit/hazmit.htm

Emergency Response and Recovery

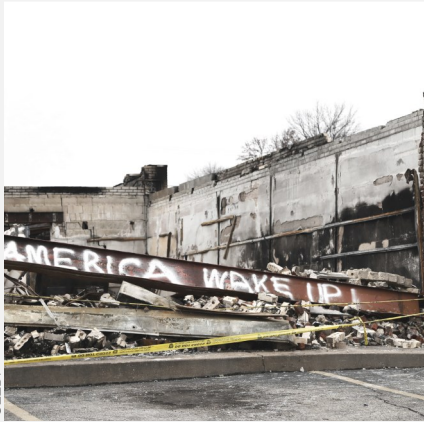
The St. Louis Area Regional Response System (STARRS) is a consortium of regional organizations that work together to coordinate and collaborate on regional responses to “large-scale critical incidences.” The organization is responsible for putting together strategy and coordination plans for responding to a variety of potential threats that can have impacts across jurisdictional boundaries, and for managing preparedness grants from the Department of Homeland Security and Department of Health and Human Services. Through a Memorandum of Understanding with East-West Gateway Council of Governments, STARRS cooperates with the region’s eight county governments that make up the East-West Gateway region. Each of the counties is represented on the Council’s Board of Directors. The Council also coordinates with the other agencies involved in emergency response and recovery, including the region’s Community Organizations Active in Disaster (COAD), Local Emergency Planning Committees (LEPC), and Community Emergency Response Teams (CERT).

Among its many functions, STARRS has developed the region’s Threat and Hazard Identification and Risk Assessment (THIRA) and Regional Emergency Resource Coordination Plan. The agency was also responsible for designing and installing the St. Louis Regional Digital Microwave System, which allows emergency responder agencies from all parts of the region to communicate across different radio systems. Along with other plans and initiatives, these plans have and will continue to assist in planning for, responding to, and mitigating the highest risk threats to the region.

Moreover, St. Louis County voters approved an Emergency Communication Sales Tax in 2009 which led to the rebuilding of the County’s siren system and implementation of an interoperable countywide wireless radio communication network.⁵

⁵ More information on STARRS and its functions can be found at <http://www.stl-starrs.org>.

CASE STUDY



SLEDP



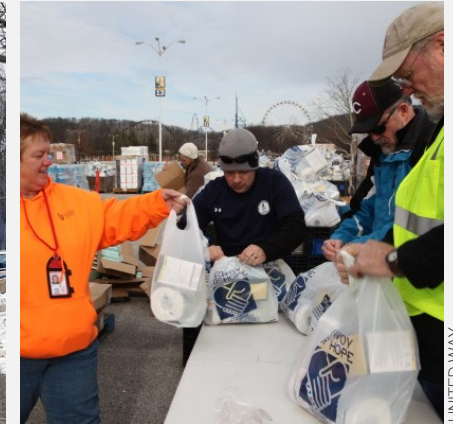
St. Louis Public Radio

SLEDP played a leadership role in the formation of the Small Business Relief Program in the wake of civil unrest in Ferguson in August 2014. The Program was an initiative of the Recovery St. Louis Coalition, which included the St. Louis Regional Chamber, a number of state agencies, a coalition of banks, workforce development partners, and business and civic leaders from the cities of Jennings, Ferguson, Dellwood, and throughout the region. The small business relief program provided grants and zero-interest loans to businesses along West Florissant that suffered damage and loss of inventory during the summer protests. The community put together a \$1 million loan fund that over 80 businesses took advantage of over the course of a year, helping to sustain the small business vitality of one of the region's major commercial corridors.

CASE STUDY



UNITED WAY



UNITED WAY

In December 2015, devastating floods reached twenty-year high levels along the Mississippi and Meramec Rivers, killing more than 20 people, displacing thousands more, and damaging hundreds of businesses. The SLEDP provided a conduit through which St. Louis County was able to provide \$500,000 in interest-free loans to businesses affected by the floods, helping them to rebuild and stay open in their communities.

Preparedness

The OneSTL Plan identifies seven major indicators of preparedness that can be used to measure the region’s ability to respond to disasters and crises:

- Flood Resilience
- Floodplain Management
- Heat/Cold Mortality
- Hazard Mitigation; Development in Potentially Hazardous Areas
- Addressing Climate Change
- StormReady

Descriptions and measures of these indicators can be found on the OneSTL site at www.onestl.org/indicators/prepared. SLEDP will continue to support efforts to improve all of these indicators, particularly in reducing development in potentially hazardous areas such as flood zones, landslide areas, and earthquake liquefaction areas, which has a particularly direct impact on economic development and resiliency.

Resilience

The City of St. Louis was named one of the 100 Resilient Cities by the Rockefeller Foundation in 2014—one of only 15 cities in in the United States to receive this designation. As part of this designation, the City received funding to support a Chief Resilience Officer position for two years (the position was filled in 2016) and develop a Resilience Plan guided by Rockefeller’s definition of urban resiliency: “the capacity of individuals, communities, institutions, businesses, and systems within a city to survive, adapt, and grow no matter what kinds of chronic stresses and acute shocks they experience.”

As part of its application, the City identified four primary regional shocks (discrete incidents of disaster) and stresses (long-term conditions of vulnerability) to be addressed as part of the Plan:

Shocks	Stresses
Riot / Civil Unrest	Endemic Violence
Heat Wave	Educational Disparities
Tornado	Declining Population
Flooding	Aging Infrastructure

While the core City is the direct recipient of the grant, the Resilience Plan will identify strategies for building resilience across jurisdictional borders. Indeed, the core principle guiding the Plan is finding ways to address regional issues in an integrated way across systemic and political boundaries. Efforts by the SLEDP to address these shocks and stresses will be an integral part of the resilience strategies formulated in this process, and the success of the Plan will be dependent on the cooperation of SLEDP in incorporating its strategies into future development projects.

Stewardship

The SLEDP will continue to support and work within the existing regional framework addressing disaster preparedness and recovery, as well as be a partner in future initiatives such as the City's Resilience Plan. Additionally, economic development projects will be guided by principles of regional resiliency, including collaboration and cooperation, diversification, flexibility, and inclusiveness.

DRAFT

SECTION 4

TRANSIT-ORIENTED DEVELOPMENT POTENTIALS

Unlike many of its peer regions, St. Louis has a dedicated light rail system connecting the region's primary employment centers, academic institutions, recreational amenities, tourist attractions, and transportation hubs. This existing infrastructure presents tremendous opportunities for expansion into underserved markets and Transit-Oriented Development (TOD), which are summarized in the *St. Louis TOD Framework Master Plan* (2013).



Virtually all of the following background and insight is drawn from the July 2013 *St. Louis TOD Framework Master Plan* prepared by the consulting firm Design Workshop.⁶ That plan is one of many development plans and related studies conducted under the aegis of what came to be known as *OneSTL*, the region's sustainability plan, sponsored by East-West Gateway Council of Governments. Authors of this CEDS have lightly edited the observations and conclusions contained in the TOD Framework Plan in order to reflect more current circumstances and to eliminate unnecessary information in this particular context.

The 2013 TOD Framework Master Plan

St. Louis remains perhaps the smallest and most economically challenged metropolitan area in the Midwest (and perhaps nationally) with a relatively comprehensive light rail system. MetroLink connects some of the greatest economic generators in the region – Lambert-St. Louis International Airport, Washington University, Barnes-Jewish-Children's Medical Center, Downtown St. Louis and Downtown Clayton, to name a few – as well as some of the region's biggest attractions (the Gateway Arch, Delmar Loop, Forest Park, and, of course, Busch Stadium). With this significant transportation resource already in place, the St. Louis region has a tremendous opportunity to leverage the MetroLink system and use transit oriented development (TOD) to bolster the region's economic position, to fortify and revitalize urban neighborhoods as well as inner-ring suburbs, and to reduce pressure on the region's freeways and roads.

The potential to create successful developments around MetroLink stations is significant. St. Louis City has already seized on trends among younger generations and empty nesters in favor of living in walkable urban environments with amenities to help stabilize its population and produce notable examples of urban revitalization. "Hip" districts such as Washington

Avenue, Midtown, the Central West End, and Delmar Loop have attracted younger professionals in their 20s as well as older adults (many retired or nearing retirement) who have sought out urban living to take advantage of the area's outstanding cultural resources. This level of revitalization represents the beginning of a trend that should continue for many years. Neighborhoods in St. Louis City near MetroLink, in particular, should continue to enjoy this trend toward living, working, and playing in urban environments over the next few decades.

Outside of St. Louis City, the location and access of the majority of MetroLink stations provides notable opportunities to create successful and well-planned TOD over the next few decades. Access to universities and colleges, adjacency or access to nearby downtown districts in smaller communities, the presence of significant areas of land proximate to MetroLink suitable for development, and the overall central location of most MetroLink stations translate into viable development potential for real TOD across the system.

Implementation and completion of TOD across the MetroLink system will require leadership, continued resources, investment from the public and private sectors, and continued patience. The *TOD Framework Master Plan* outlines the principles and actions needed to bring successful TOD to reality in the region. The document begins by defining a vision for transit oriented development that aligns with the economic and political realities of the St. Louis region. TOD will likely not emerge in the same form in St. Louis as it has in Portland, San Francisco, Dallas, or other larger cities. The needs and desires of the individual communities along the MetroLink system must inform the character and design of development at each of the station areas. Nevertheless, a common set of principles, based upon research and experience locally and nationally, must guide transit oriented development.

The *Framework Plan* explores the various principles that should guide TOD system-wide, but the region's leaders must importantly understand and follow a few key principles in particular. While the regulations and guidelines of many communities around the MetroLink system remained geared to lower density and conventional development, successful development around station areas must incorporate an increased density or concentration of residents and

⁶ Other consultants contributing to the Framework Plan were Nelson\Nygaard, BAE Urban Economics, and Hudson Associates.

employment in order to provide for real estate viability and to stimulate higher levels of ridership along the MetroLink system. Successful TOD must incorporate a mixture of land uses to be successful, including retail, residential, office, and entertainment uses. Finally, the design of TOD must orient around increased levels of transit usage and in encouraging all modes of travel, including walking and bicycling as well as vehicular and transit. The design of streets, greenways, and surrounding community connections must encourage more people to take MetroLink from various station areas and must provide good connections from nearby bus lines to the light rail system.

Overall, the design for MetroLink stations going forward must go beyond an orientation that considers the needs of commuters first and foremost and must outline a framework for the creation of true communities around the station areas. Just as well-planned districts such as the Central West End, South Grand, and the Delmar Loop have become symbols of the revitalization of St. Louis, local communities could create similar examples of development around their MetroLink stations over time that will serve as anchors for continued economic revitalization and expansion. The TOD Framework Master Plan follows the discussion of the key principles underlying successful TOD with a profile and evaluation of development potential at each station area. The document outlines opportunities and constraints at each station and provides a specific set of action items that local jurisdictions should complete in order to move transit oriented development efforts forward.

A toolbox of TOD implementation techniques toward the end of the document discusses key techniques that the public and private sectors may use to effectively create true examples of good TOD. Key tools include the incorporation of affordable housing in TOD, the establishment of parking replacement policies, and a range of public finance techniques applicable.

The creation of transit oriented development throughout the MetroLink system has the potential to revitalize local communities and economies, increase ridership throughout the light rail system, produce environmental benefits throughout the region, and create unique districts and developments that will serve as sources of pride for local communities. More than twenty years after

the opening of the MetroLink system, the St. Louis region has an opportunity to create true transit oriented development and, in this way, maximize the return on investment from the initial creation of the region's light rail system. Now is the time for action. The *TOD Framework Plan* should help the region's leaders and citizens in moving forward.

Achieving this goal will involve a good deal of political courage, cooperation, and creativity. As the overall agency in charge of MetroLink and tasked with attracting development around the light rail stations, Bi-State Development will fulfill an important leadership role.

- First, the Bi-State Board of Directors are strongly encouraged to endorse this Framework Master Plan as a guide to future development around the various MetroLink stations.
- Second, the Bi-State Board are strongly encouraged to use its role as a leader in the region to work with local jurisdictions along the system in building support for the regulatory frameworks necessary for TOD. In particular, the Bi-State Board should confer with various municipalities for increased housing and employment density near stations and actively rezoning the station areas for mixed-use classifications, along with zoning parameters that support TOD. This support from Bi-State will be very important, as a number of communities across the metro have had difficulties in approving higher density projects in the face of opposition.
- Third, Bi-State is strongly encouraged to partner with Great Rivers Greenway in GRG's efforts to expand trail networks across the region, including connections to MetroLink station areas, and ongoing efforts to implement Great Streets across the region. Bi-State is strongly encouraged to also partner with Trailnet in the design of streets for bicycle traffic, both near MetroLink stations and community-wide. Bi-State is strongly encouraged to fully embrace and campaign for the philosophy of multi-modal transportation in TOD planning. Regional partners, including the public and private sector, should look for early victories in the overall effort to spread TOD throughout the MetroLink system. Bi-State is strongly encouraged to immediately seek to create successful demonstrations of

transit-oriented development at a small number of stations. Bi-State is strongly encouraged to build strong partnerships with St. Louis County and the City of St. Louis, as well as the local municipalities, and work together to outline realistic public finance strategies to support ongoing development. At Rock Road, for example, Bi-State already has a strong non-profit development partner in Beyond Housing in place. At Union Station/Civic Center, the SLDC already has strong relationships in place with local property owners and can help to promote the vision for TOD in the area. At North Hanley, Bi-State owns significant parcels of land, which presents a great opportunity to use parts of this acreage for TOD without having to contend with property assemblage issues. Bi-State is strongly encouraged to begin to work with the Federal Transportation Administration to obtain approval for the use of portions of this land for development.

With these steps in place, Bi-State then should formally engage the private sector and actively promote the real estate opportunities at each demonstration station. While similar steps can be taken at each of the stations within the MetroLink system, it should be remembered that “nothing succeeds like success.” The agency, along with public and private sector partners, can demonstrate the value of the TOD concept by bringing it to life in selected locations. Proving the value of TOD at a few sample locations will help a great deal in educating other municipalities about the benefits of TOD and helping them to embrace further TOD in their own communities. The creation of transit-oriented development throughout the MetroLink system has the potential to transform the character of the region and to revitalize local communities and the economy. There is much to be done but success is well within reach. It is now time for action.

Future Transit Stations

Both St. Louis City and, separately, St. Louis County are embarking on major transit corridor studies at the end of 2016. To be overseen by steering committees that include representatives of the City and County jointly, several potential corridors will be studied.

In the City, the long-proposed Northside-Southside light rail line with connections in and through Downtown St. Louis will be studied. The proposed NS-SS line would extend from Goodfellow Avenue and Interstate 70 in North St. Louis City with stops along Natural Bridge Road and near the proposed National Geospatial-Intelligence Agency headquarters site and North Riverfront. The line would then provide direct access to Downtown St. Louis and extend west on Chouteau Avenue and south on Jefferson Avenue to Interstate 55 with additional stops in South St. Louis County.

Within the City, the trains may operate as streetcars. In fact, most of the alignments will be on existing streets and a goal is to have more frequent stops and slower speeds than a traditional light rail network. Upon reaching the suburbs, the trains would operate more like light-rail at higher speeds with fewer stations and, as much as possible, in dedicated rights-of-way.

Three separate lines are to be studied in St. Louis County, all of which would connect with existing or future transit lines in the City. One of the three new lines would extend into north St. Louis County, one to western reaches of the County, and the third into south county. These lines would operate as traditional light rail routes with higher speeds than streetcars and less frequent stations.

The consulting team for the Northside-Southside line will complete the pre-engineering study by the spring of 2018. The three lines in St. Louis County will have study completion dates of late 2018.

SECTION 5

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

Supported by 21 previous plans and reports published over the last 10 years, the following SWOT analysis provides a summary of the challenges that the St. Louis region faces and the opportunities for sustained prosperity and equitable growth. The SWOT analysis forms the basis for the Action Plan of vision, strategies, goals, and implementation.



Background

In recent years, a number of reports have reviewed the regional and county-level economies of Greater St. Louis. The analysis of the City and County's relative strengths, weaknesses, opportunities, and threats (SWOT) is supported by 21 existing plans produced during the past ten years as well as feedback from the CEDS Strategy Committee.

The categorization that follows is reflective of the broad consensus of the reports reviewed. Most reports did not include a specific SWOT component; therefore, findings are integrated into a SWOT framework based on the assessment of the consulting team. It is worth noting that many of the issues raised are not specific to St. Louis, but apply to many regions with established economies seeking to adapt to the challenges of the evolving rust-belt economy.

Supplemental research was conducted as needed to expand the discussion of certain items and to extend topical coverage in accordance with EDA's SWOT guidelines (see following page). However, content has not been robustly updated or cross-checked with the latest regional conditions and priorities. Therefore, this categorization reflects a starting point, rather than an end point, for the conversation about the current status of the regional economy of St. Louis.

Previous Plans and Reports Reviewed Organization	Year
Defense Adjustment and Advanced Manufacturing (AECOM) St. Louis Economic Development Partnership	2016
Metro St. Louis Export Plan World Trade Center St. Louis	2016
Forward Through Ferguson The Ferguson Commission	2015
North Riverfront Open Space and Redevelopment Plan City of St. Louis	2015
SLEDP Strategic Plan St. Louis Economic Development Partnership	2014

Previous Plans and Reports Reviewed Organization	Year
Better Together - Economic Development Better Together	2014
Runway of Opportunity St. Louis Gateway	2014
SLEDP Stakeholder Planning Forum St. Louis Economic Development Partnership	2013
Imagining Tomorrow - St. Louis County Strategic Plan St. Louis County	2013
OneSTL - Regional Sustainability Plan East-West Gateway Council of Governments	2013
St. Louis Metro Workforce Assessment St. Louis County Economic Council	2013
St. Louis Strategies & Priorities for Regional Business Diversification & Growth St. Louis County Economic Council	2013
St. Louis Sustainability Plan City of St. Louis	2013
St. Louis Regional Freight Study East-West Gateway Council of Governments	2013
North Riverfront Commerce Corridor Land Use Plan City of St. Louis	2012
Economic, Demographic and Entrepreneurial Profile of the Region St. Louis Economic Development Partnership	2012
Grand Center Framework Plan Grand Center, Inc.	2012
St. Louis Regional Economic Adjustment Strategic Plan (AECOM) St. Louis County Economic Council	2011
Missouri Strategic Initiative for Economic Growth State of Missouri	2011
Where We Stand - The Strategic Assessment of the St. Louis Region East-West Gateway Council of Governments	2011
Comprehensive Economic Development Strategy (CEDS) St. Louis County Economic Council	2005

EDA SWOT Guidelines

Consideration was also given in reviewing the content of the above listed plans and reports in light of the guidelines offered by EDA for SWOT analyses within a CEDS. The guidelines list a variety of topics that the analysis should address, and care has been taken to ensure coverage of each of these topics within the framework below, including for those areas that received limited attention in prior reports.⁷ Further, categorization takes into account the following definitions of the SWOT categories provided by EDA:

Strengths

are a region's **relative competitive advantages** (e.g., industry supply chains and clusters, extensive port, rail, and broadband assets, specialized workforce skills, higher education levels, collaboration among stakeholders) **and often are internal** in nature.

Weaknesses

are a region's **relative competitive disadvantages** (e.g., a risk-averse or change-resistant regional culture), also **often internal** in nature.

Opportunities

are chances or occasions for regional improvement or progress (e.g., expansion of a biosciences research lab in the region), **often external** in nature

Threats

are chances or occasions for **negative impacts on the region or regional decline** (e.g., several companies in the region considering moving to lower-cost areas of the state), also **often are external** in nature.

CATEGORIZATION OF STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

- ◆ High value target sectors
- ◆ Institutions of higher education
- ◆ Cultural amenities
- ◆ Cost of living
- ◆ Commercial transportation and logistics

- ◆ K-12 education system in selected but high profile districts
- ◆ Concentration and suburbanization of poverty
- ◆ Equity of opportunity
- ◆ Public transportation
- ◆ Build out of County and City aging infrastructure
- ◆ Fragmentation of general and special purpose governments

- ◆ Expansion of global connections
- ◆ Cultivation of human capital
- ◆ Emergence of millennial generation
- ◆ Entrepreneurship
- ◆ Economic development network
- ◆ Promise Zone

- ◆ Slow population growth including sluggish immigration
- ◆ Negative image/perception
- ◆ Aging population
- ◆ Shrinking public sector finances
- ◆ Limited telecommunications/broadband access
- ◆ Flooding and increased temperature
- ◆ Energy standards

⁷ The full list of recommended topic areas are: (1) state of the regional economy, (2) regional clusters, (3) external trends and forces, (4) workforce considerations, (5) spatial efficiencies/sustainability, (6) broadband needs, (7) energy needs, (8) natural hazards, (9) equitable development, and (10) partners/resources for economic development

Strengths

1. **High Value Target Sectors:** A consistently cited strength of the St. Louis region is the quality and diversity of high value economic sectors. These include plant and life sciences, biomedical technology, healthcare, aerospace, multimodal logistics, and financial services. According to the St. Louis Metropolitan Workforce Assessment (2013), Finance and insurance is the fastest growing sector, at a rate of 21.4 percent from 2007 to 2012. Looking ahead, the Health care and social assistance sector is projected to add 32,000 jobs by 2021, accounting for over \$1.5 billion infused into the economy through these additional wages. Past reports consistently identify St. Louis' continued leadership in the biosciences, due to not only the internationally recognized scientific research universities, but also the multinational corporations that call the region home.
2. **Institutions of Higher Education:** In St. Louis City and County, there is a large number of institutions of higher education, a high concentration of PhD level research, and an abundance of training opportunities for workers to further their education. In fact, the Imagining Tomorrow Strategic Plan for St. Louis County (2013) emphasizes the connection between these factors and a well-educated work force, which can then not only attract new businesses, but also encourage business expansion, and foster research growth in targeted sectors. The most prominent leaders include Washington University, University Missouri – St. Louis, and St. Louis University. As an example of their direct impact, the City of St. Louis had the fastest growth rate between 2000 and 2013 of college-educated, young professionals living in the urban core among all metropolitan areas. Harris-Stowe State University graduates the highest number of African-American males in the state of Missouri. This is important as it leads to increased workforce quality, innovation, and research, and well as the organic revitalization of neighborhoods.
3. **Cultural Amenities:** The St. Louis region is rich in cultural amenities that both add to the quality of life for the residents and serve as an attraction for visitors. The OneSTL Plan for a Vibrant, Healthy, Prosperous St. Louis Region (2013) notes that cultural institutions contribute significantly not only to the City's collective identity and overall quality of life, but also to the local economy. In fact, they reference the Arts and Economic Prosperity IV Study (2010) in their finding that attendees of cultural events spend on average almost \$25 per capita outside of the event itself, a stimulus for economies that are rich in these amenities. As an indicator of scale, St. Louis is reported to be second only to the Washington D.C. metro area in its volume of free museums, cultural institutions, and attractions. These cultural amenities give character to the region and ultimately contribute to the quality of place that aids in the attraction of workforce talent to the St. Louis area.
4. **Competitive Cost of Living:** The St. Louis region offers a very competitive cost of living, an asset that can help attract and keep talent in the area, and also impacts quality of life for residents. The cost of everyday necessities in St. Louis, such as groceries, transportation, and health care are close to the national average, but the cost of housing is notably lower, with St. Louis rated among the most affordable metros in the country for housing.⁸ Nearly 85 percent of housing is considered affordable for families earning the median income and the cost of living is below the national average. In fact, the region was recently ranked as the fifth most affordable middle-income housing market among 86 major metropolitan markets across nine nations.⁹
5. **Interstate Air, Rail, Shipping, and River Transportation:** St. Louis is located at the union of the Missouri and Mississippi rivers and thus has access to water and fertile soil that aids in the agricultural sector. In addition to the two rivers, there are also four interstates, an international airport, and six Class 1 railroads that round out this logistics hub (as identified in the AECOM plan). The infrastructure and strategic location position the region as a transportation center that helps to attract and retain businesses. The region holds the northernmost ice-free port on the Mississippi River, which is combined with connections in all directions with heavy rail and interstate trucking. The STL Sustainability Plan notes that this not only facilitates the distribution and transfer of goods, but of logistics industries – a key sector for the City.

⁸ Payscale Cost of Living Calculator (<http://www.payscale.com/cost-of-living-calculator/Missouri-St.-Louis>)

⁹ New Geography, "Life is Good in St. Louis", 3/13/15 (<http://www.newgeography.com/content/004869-life-good-st-louis>)

Weaknesses

1. **K–12 Public School System:** The public school system is consistently identified as a concern for the region. According to the *OneSTL* Plan, K-12 education surfaced as a primary concern at nearly every public meeting of that planning process. That said, there are 24 school districts in St. Louis County, only two of which are presently unaccredited. But these trigger disproportional media attention, especially when many of the students of these districts become transfers to accredited districts. There is uneven educational quality, access, and alignment among the public school districts that includes two unaccredited school districts in high poverty areas. This exacerbates an achievement gap and a concerning graduation rate for City schools. *OneSTL* also points to the fact that the difference in education quality also effects neighborhood stability, as a public school's ranking significantly affects where families choose to live, a demand that directly influences property values in the different districts. Educators in these districts emphasize inadequate state funding, and with the looming possibility of de-accreditation, this issue has become a top concern for families, educators, business leaders, and the local government alike. Ultimately, this is a multi-faceted problem that negatively affects the talent soon to enter the workforce, stratifies neighborhoods based on school quality, and further increases economic opportunity gaps.
2. **Increasing Concentration and Suburbanization of Poverty:** Poverty is closely linked to such concerns as academic struggle, increased crime, and poor health outcomes, all of which are prevalent in and around St. Louis. According to the *Imagining Tomorrow*, St. Louis County's Strategic Plan, the northern inner-ring and northeast suburban communities have increased poverty levels with two extreme poverty tracts (40 percent + below the poverty line) and 24 high poverty tracts (20-40 percent) as well as two unaccredited school districts. Localized increases in crime rates and decreases in health outcomes are also found in these concentrated areas that disproportionately affect minorities, children, and those with disabilities. The increased concentration of poverty is a concern as support systems and infrastructure are not readily available in the suburbs to handle this historically "urban issue." Furthermore, the region's poverty rate hasn't followed the peaks and valleys of the country as a whole, but has instead steadily risen for over a decade.
3. **Equity of Opportunity:** There are significant challenges in equity and inclusion of opportunity in the region, with poverty affecting minorities and children at a disproportionate rate. According to the *Where We Stand* report (2011), in 2009 black residents were 3.4 times more likely to live below the poverty line. In fact, the median income for black households was less than \$29,000 whereas it was over \$57,000 for white households. In an economic sense, St. Louis is undercapitalizing on its human capital potential. The *OneSTL* Plan notes the low probability of upward mobility, and cites income segregation and the increased likelihood of lower quality schools in low income areas as two probable contributing factors. Racial disparity is also a concern for public health, as the black infant mortality rate was more than three times as high as that for white infants. The 2005 CEDS notes that apart from the obvious implications of persistent inequality, the atmosphere of racial tension also deters both homeowners and businesses from calling certain areas home, a limitation that further inhibits economic growth and development.
4. **Public Transportation:** The suburbs of St. Louis remain auto-oriented, with very little public transportation connection between the central core and the outskirts of the region. The *Where We Stand* Strategic Assessment of the St. Louis Region suggests that the region's low ranking in mobility reflects that the region's public transportation system does not provide adequate coverage or frequency for citizens without automobiles. Historically, there has been an underinvestment in regional logistics infrastructure, specifically lacking in the auto-oriented suburbs. According to *OneSTL*, over the past five decades, investments have focused on the highway system, an overreliance that contributes to the region's poor air quality, deters new businesses from moving to the region, and limits the availability of alternative modes of transportation. The changing demographics of the region, most notably the increased Millennial population, have caused a shift in preferences toward a more multi-modal system priority on connecting workers to the region's jobs.
5. **Build-Out of County and City:** St. Louis City and County are widely considered "mature" with little remaining green field land available to facilitate growth. According to the 2005 CEDS for St. Louis County, land availability was even then noticeably shrinking, prices were rising, and it had become difficult to acquire large tracts. Indeed, the relative lack of easily developed land combines with the aging infrastructure (roads, bridges,

utilities) to demand redevelopment strategies that focus on infilling areas that have been underdeveloped for a long time or that have deteriorated over time. Such issues are fairly common in urban cities like the City of St. Louis (though much is to be re-developed even there) but are relatively new to suburban communities.

6. **Government Fragmentation:** The City of St. Louis and St. Louis County are separate political jurisdictions. Within St. Louis County, there is a patchwork of 90 municipalities, all with their own elected governments and most with police departments to fund – an arrangement that is costly and hinders the ability to solve collective problems. Given citizens' needs and service demands, it is easy to understand how many of these small municipalities are fiscally strained. Further, abutting municipalities often see themselves in competition with one another for businesses via tax incentives, leading to cycles of "poaching" that can further drive down municipal revenues.¹⁰ The infamous route that many municipalities take to mitigate this problem is resorting to traffic tickets and fines for revenue, a tactic that has contributed to tension between residents and their elected officials and law enforcement¹¹ and has led to a Missouri Supreme Court ruling and General Assembly legislation strongly inhibiting such fiscal tactics. In turn, many of the smaller municipalities are left struggling for resources.

¹⁰ Bloomberg, "The County Map That Explains Ferguson's Tragic Discord", 08/15/14 (<http://www.bloomberg.com/bw/articles/2014-08-15/how-st-dot-louis-countys-map-explains-fergusons-racial-discord>)

¹¹ Washington Post, "What happens when a metropolitan area has way too many governments", 02/18/15 (<http://www.washingtonpost.com/blogs/wonkblog/wp/2015/02/18/what-happens-when-a-metropolitan-area-has-way-too-many-governments/>)

Opportunities

1. **Expansion of Global Connections:** Greater St. Louis has the ability to build the capacity to expand global connections, relations, and investments. Opportunities include the growing export markets in Asia, immigration of talented labor, and companies currently reshoring their presently foreign workers. According to the *Imagining Tomorrow St. Louis County Strategic Plan* (2013), regional exports are expected to increase by more than 70 percent by 2023. Increasing international business and trade not only can raise the region's profile as an exporter, but also is expected to help attract foreign-direct investors, all of which would help to boost the regional economy. The *OneSTL* plan asserts that opportunity to develop a niche in the global market, despite the loss of manufacturing jobs and company headquarters, is upon St. Louis; the Metro St. Louis Export Plan developed by the World Trade Center of St. Louis provides a path forward.
2. **Cultivation of Human Capital:** Broad long-term economic trends trace a shift from reliance on natural resources to a greater cultivation of human capital. This entails not only a focus on talent attraction, but also importantly on retention, as well as the capitalization of the region's research strengths. Attention should thus also be paid to improving education and workforce development in order to build stronger human capital within the existing regional population. Stakeholders at the SLEDP Planning Forum reported the importance of the intentional inclusion of individuals, institutions, and communities and how fostering inclusionary diversity will inherently attract domestic and international migrants with higher job skills. The *STL Sustainability Plan* notes how smart learning hubs, such as incubators, as well as collaborative work environments (of which there are already multiple throughout St. Louis), can provide the necessary assistance and support to cultivate human capital.
3. **Emergence of the Millennial Generation:** The Millennial generation is the nation's largest, numbering about 80 million – slightly larger than the Baby Boomers. In St. Louis County, Millennials, born between 1980-2000, make up 26 percent of the population. The Millennials are more highly educated than previous generations and many are in higher education or the early stages of their careers. However, the reports note that this group struggled to begin their careers in the post-recession economy, with only

41 percent of 18-29 year olds working a full-time job. The AECOM Regional Study makes sense of this lack of job opportunity by noting that the workforce is swollen with Baby Boomers delaying their retirement, which means fewer positions and less upward mobility for the younger workers who are first to fire and last to hire. However, as retirement levels rise in the coming years, job opportunities will open and it is expected that the younger generation will not even be able to fill all resulting open positions. Alternative modes of public transportation, as well as mixed-use housing, are two fundamental desires of this generation that are currently not widely available in the City and County, and one quarter of recent graduates are moving back in with their parents. On this front, it is important to note that in June 2015, the County Executive authorized a \$1 million study to determine the feasibility of possible MetroLink expansion routes.¹² St. Louis City has also obtained funding to further evaluate development opportunities along the North/South route. Attention to issues like education, public transportation, growing downtown neighborhoods with mixed-use housing, and job creation are opportunity areas through which metro St. Louis can grow and retain this demographic group.

4. **Entrepreneurial Support:** There is strong and growing access to capital, facilities, services, etc. for entrepreneurs in Greater St. Louis. New venture funds, accelerators, incubators, mentor programs, early-stage capital, and the Arch Grants, are just a few programs that have increased the likelihood of the continuation of the start-up scene. The Helix Center, a biotechnology incubator, is a great example of the kind of support that is specifically offered for entrepreneurs in the biosciences. T-Rex, located Downtown, leads an innovative cybersecurity effort.¹³ Metro St. Louis was recognized as a hot newcomer in the high-tech start-up scene, as it matures, the ability to retain the businesses founded, grow those that have succeeded, and attract new entrepreneurs becomes the new challenge.¹⁴
5. **Economic Development Network:** Although there is a large network of economic development organizations and leaders throughout St. Louis, many studies consistently note the historical fragmentation in economic development and how this prevents the St. Louis region from living up to its economic potential. According to *OneSTL*, municipalities have historically competed with one another to secure new development, which leads to development moving from one area to another, as opposed to growth in

the whole region. The *EDP Working Strategic Plan* (2014) notes that the St. Louis Economic Development Partnership was established in 2013 in hopes of combining regional efforts into an integrated economic development platform. The formation of this organization is an opportunity for the region to finally see a cohesive economic development strategy.

6. **Promise Zone:** In April of 2015, a large portion of North St. Louis City and County (encompassing approximately 200,000 residents) was named as a Promise Zone by the United States Department of Housing and Urban Development (HUD). Out of 120 contenders nationwide, St. Louis was one of only six urban winners. The goal of St. Louis' participation in this program is to transform the most distressed communities of North St. Louis City and County.¹⁵ This designation gives the area preferential access to federal agencies and programs, as well as resources to improve law enforcement, crime prevention, job training, education, and healthcare. It also provides a HUD coordinator and five new AmeriCorps members.

A number of significant initiatives and developments are already having a positive impact on the Promise Zone to date: 1) The Career Pathways Bridge skills-training and employment initiative received a \$5 million federal grant, which will allow for the training of an additional 3,000 workers in North St. Louis City, 2) a portion of the Promise Zone will benefit from the \$4.7 billion MSD Project Clear (see page 48 for description), and 3) the announcement of the National Geospatial-Intelligence Agency (NGA) building a new \$1.7 billion headquarters will bring more than 3,000 jobs to North City and potentially catalyze new development.

¹² STL Today, "St. Louis County faces steep odds getting MetroLink on expansion track", 06/01/15 (http://www.stltoday.com/news/local/govt-and-politics/steve-giegerich/st-louis-county-faces-steep-odds-getting-metrolink-on-expansion/article_ca08d157-a62e-57ea-a9ac-1cd7cfeaa13d.html)

¹³ St. Louis Regional Chamber, "Entrepreneurship & Innovation" (<http://www.stlregionalchamber.com/work/innovation-entrepreneurship>).

¹⁴ St. Louis Business Journal, "St. Louis slips in latest startup activity ranking", 06/04/15 (<http://www.bizjournals.com/stlouis/blog/biznext/2015/06/st-louis-slips-in-latest-startup-activity-ranking.html>)

¹⁵ St. Louis County Missouri, "St. Louis City, County Named Promise Zone", 04/29/15 (<http://www.stlouisco.com/Community/News/Article/1127/St-Louis-City-County-Named-Promise-Zone>)

Threats

1. **Slow Population Growth:** There have been more than 40 years of sluggish population growth in metropolitan St. Louis, with annualized growth rates averaging less than 0.5 percent in the last decade, according to the AECOM study. This growth rate was significantly lower than peer counterparts, benchmark regions, the state of Missouri, and the nation as a whole. Meanwhile, St. Louis County added almost no net new population and St. Louis City continues to lose population (though gaining in the Central Corridor). This can be partially attributed to the lack of immigration, as only 4 percent of the population is made up of immigrants. Another contributing factor is ongoing “brain drain,” as many young professionals who receive their education in St. Louis leave after graduation. That said, St. Louis County’s brain drain analysis showed a slight net gain in recent years. A declining birth rate due to aging of population is significant in the County, however. Decreasing household sizes, in part due to the aging population, is another area of concern for population decline, raised in the *Imagining Tomorrow* Strategic Plan. Slow population growth is a concern as, according to the Economic Demographic and Entrepreneurial Profile, it limits job growth and entrepreneurial activity, two fundamental drivers of the economy.
2. **Negative Image/Perception:** Past plans consistently identified the areas of high poverty concentration, localized areas of higher crime, failing school districts, and specific incidents that catch both national and international attention as drivers of a negative picture of the region for outsiders. Furthermore, the AECOM study noted that the region itself has a surprisingly negative self-image and relative complacency with the status quo. The most robust commentary on this matter was found at the SLEDP Stakeholder Planning Forum where the negative image/perception of the St. Louis region was consistently mentioned as a major challenge. In addition to echoing the above concerns, participants also emphasized an “inferiority complex” and lack of positive promotion despite the fact that people who move to St. Louis are “pleasantly surprised.” There is very little branding of the region as a whole, and instead of “selling” St. Louis to the population that they want to attract, the posture tends to be more defensive. An offensive stance should be taken to emphasize a more positive picture of the region.
3. **Aging Population:** The Baby Boomer generation accounts for more than 28 percent of the population as of the 2010 census, the largest age group in St. Louis. The *Imagining Tomorrow* Strategic Plan expects that their retirement will be different from past generations as many will work later in life and remain in their communities instead of moving to warmer climates. Some will look to move into multi-use housing developments that contain retail spaces, grocery stores, restaurants, sidewalks, and public transportation nearby, essentially requiring a redevelopment of their suburban spaces. Others will choose to stay in their homes in the auto-oriented suburban areas, but will eventually need to rely on public transit as an alternative mode of transportation. In both situations, the region will need to develop both residential and transportation infrastructure to suit the Baby Boomers’ needs as for those who live past 70, it is expected that they will outlive their driving age by 7 – 10 years. Addressing health needs will also be a concern, with the need for adequate medical centers and support services increasing. Ultimately, this first “suburban generation” will have a large influence on the social and physical environment of St. Louis.
4. **Shrinking Public Sector Finances:** There has been a slow and painful recovery in public sector finances after many years of decreased revenue associated with the recession. This limits the potential for collective action around economic development. The AECOM Regional Study notes that this creates difficult decisions regarding project prioritization of aligning scarce resources with the extensive community reinvestment desperately needed.
5. **Telecommunications and Broadband Access:** In 2014, NEF (formerly known as New England Fiber) conducted a telecommunications and data center study of the St. Louis region, and ultimately published a connectivity report¹⁶ that includes research, analysis, and recommendations. The findings show that while the region is well connected in traditional infrastructure and has enough physical fiber to be

¹⁶ St. Louis Regional Broadband Summit, “St. Louis Connectivity Report”, 2014 (<http://stlbroadbandsummit.org/st-louis-connectivity-report/>)

a regional telecommunications hub, it has yet to take advantage of the connectivity wealth at hand. St. Louis has to establish itself as a key telecommunication market in order to gain the services of the providers that already have the infrastructure in the region.

6. **Flooding and Increased Temperature:** Between 1993 and 2013, the Mississippi River crested the major flood stage 11 times, and this risk of flooding is expected to only increase in the coming decades. The OneSTL Regional Sustainability Plan notes that the heavy industry of the region is contained within levee-protected areas, but maintaining and improving this system is crucial to protecting both industries and riverfront communities. Also, the average temperature, as well as number of days with temperatures above 95°, is expected to increase in the coming decades, being both a public health concern as well as a material concern for pavement, bridge expansion, as well as the use of electricity. Measures such as registries for vulnerable individuals during heat waves, as well as street trees to avoid the urban heat island effect should all be taken seriously as this is a looming concern. St. Louis needs to prepare to ensure resiliency against forthcoming issues over which it lacks direct control.
7. **Energy Standards:** Coal-fired power plants are the largest polluters in the state, yet Missouri is highly dependent on them. This puts St. Louis at a disadvantage as there are not only health ramifications, but also missed economic opportunity in the growing clean energy sector. St. Louis City and County are EPA designated “Nonattainment Counties” and are currently out of compliance with federal air quality standards.¹⁷ The St. Louis region also ranks among the top 10 regions in the country for having the poorest air quality and among the top 20 regions for asthma risk.¹⁷ The City and County are also missing out on job creation that neighboring states are benefiting from as a result of clean energy investment. This lack of alignment with the new direction of energy in which much of the country is headed puts St. Louis at a disadvantage on a national scale, especially with the potential for stricter industry regulations moving forward.

¹⁷East West Gateway Council of Governments. Where We Stand. 7th Addition.

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SECTION 6

METRICS

As required by the EDA, performance measures must be established to evaluate the implementation and success of the goals and objectives of the CEDS. Traditionally, economic development metrics have focused primarily on job growth and levels of direct investment; however, these measures do not always paint a full portrait of success. The following performance measures aim to show broader levels of success, including measures related to transportation access, entrepreneurship, and education.



STRATEGY 1

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOALS

1.1

Stimulate investment in North St. Louis City, North St. Louis County, and the Mississippi and Missouri Riverfronts by supporting catalytic development and redevelopment with major infrastructure improvements and upgrades.

PERFORMANCE MEASURES

- >> Increased number of small business licenses obtained in the targeted geographic areas.
- >> Increased roads and bridges with high quality ratings.
- >> Increased density of development (floor area and units per acre).
- >> Increased local government tax revenues generated in the subject areas.
- >> Increased employment in a diverse range of economic sectors in the targeted areas.
- >> Increased number of Great Streets plans completed in the target areas and rate of growth in economic development in those corridors.
- >> Increased ratio of building permits issued in the targeted areas relative to the rest of the region.

1.2

Improve regional connectivity and reduce vehicle miles traveled by expanding multi-modal transportation options and adjusting land use and development incentive policies.

- >> Increased density of development near major stations and bus stops.
- >> Added overlay and related zoning regulations that incentivize TOD.
- >> Increased ridership on buses and transit trains commensurate with reduced driving per capita.
- >> Increased number of transit stops that are enhanced with shelters, furniture, LED signage, and the like.
- >> Reduced commuter vehicle miles traveled.

1.3

Increase private real estate values, stimulate future investment and redevelopment, and provide multi-modal transportation opportunities through streetscape improvements, road diets, and appropriate street designs.

- >> Rate of increase in private property value in below regional median value locations that exceeds the rest of City and County.
- >> Reduced lane miles with roads still achieving high quality ratings.
- >> Increased expenditures by local, regional, and state government on pedestrian improvements.

INFRASTRUCTURE

GOALS

1.4

Promote "smart technology" and innovation to ensure stable energy and information networks for regional economic and job growth.

PERFORMANCE MEASURES

- >> Reduced rates of energy inputs for heating, cooling, processing, and related purposes.
- >> Reduced average utility bills for both residents and businesses in targeted areas.
- >> Implementation of and greater use of the implementation tools of both OneSTL and the City of St. Louis Sustainability plans.
- >> Increased ratio of transit ridership to automobile commuters.
- >> Increased access to broadband.

1.5

Increase access to the region's natural amenities and recreational opportunities by supporting the implementation of the regional greenways and trails system.

- >> Increased mileage of greenways, trail, and physical connections to and between parks and natural open spaces.
- >> Increased per capita spending on greenways, greenways, trail, and physical connections to and between parks and natural open spaces.

1.6

Support a variety of additional infrastructure improvements that increase access and safety for pedestrians and vehicles and further reduce barriers to pedestrian and bicycle connectivity.

- >> Increased ratio of commuting by bicycle and walking.
- >> Increased mileage of dedicated bicycle lanes and pathways.
- >> Increased investment in pedestrian infrastructure.

STRATEGY 1

Investing in Infrastructure and Real Estate Development

REAL ESTATE DEVELOPMENT

GOALS

1.7

Leverage the redevelopment potential of Lambert-St. Louis International Airport.

PERFORMANCE MEASURES

- >> Increased landings at the Airport of both passenger and freight traffic.
- >> Increased investment in real estate development in areas surrounding the Airport.
- >> Added tax revenues generated from real estate surrounding the Airport.
- >> Increased employment in areas surrounding Airport.
- >> Increased retail sales in areas surrounding Airport.
- >> Increased usage of Airport MetroLink station.

1.8

Stimulate sustainable infill development by leveraging existing and future transit nodes and emphasizing the redevelopment of obsolete commercial corridors.

- >> Added overlay and related zoning regulations that incentivize TOD.
- >> Increased real estate investment in areas around transit stations.
- >> Increased employment and/or population in areas surrounding transit stations.

1.9

Develop shared regional data and administrative systems to promote real estate development and reinvestment activity.

- >> Increased views, downloads, users on existing, enhanced, or new regional property database websites or portals.

GOALS

PERFORMANCE MEASURES

2.1

Leverage existing, or promote creation of new, tax credit programs, lending or other funding programs that support entrepreneurs and the small business community.

- >> Increased number of small business licenses obtained.
- >> Increased annual startup rate.
- >> Increased employment from startups.
- >> Decreased business termination rate.
- >> Increased expenditures in tax credit programs or funding programs.
- >> Increased ArchGrants allocations.
- >> Documentation of new programs (or expansion of existing programs).

2.2

Continue providing resources to nurture high-growth startups and technology firms in the region.

- >> Increased regional venture capital investment.
- >> Increased employment in technology-related sectors.
- >> Increased ratio of technology-related jobs within the City and County relative to the rest of the metro area.

2.3

Support talent, innovation, and entrepreneurship for young professionals.

- >> Increased population of individuals with at least a bachelor's degree.

2.4

Expand opportunities for minority- and women-owned businesses.

- >> Increased participation rates for public sector investment.
- >> Increased certification rate for minority and women-owned businesses.

2.5

Continue expanding the St. Louis region as a hub for agriculture and bio-science innovation and technology through the global plant science corridor.

- >> Increased patent issuance rate.
- >> Increased employment at anchor institutions, organizations, and corporations.
- >> Increased investment by BioGenerator.
- >> Document annual performance measures compiled by BioSTL, the region's premiere bioscience advocacy organization.
- >> Increased number of companies in the global plant science corridor.

STRATEGY 3 » Leveraging Our Assets

GOALS

3.1

Support and/or target business retention and expansion activities.

PERFORMANCE MEASURES

- >> Increased numbers of jobs in existing businesses.
- >> Increased gross domestic product per employed worker.
- >> Increased personal income per employed worker.

3.2

Improve regional, national, and international connections for business growth.

- >> Increased value and volume of exports to foreign countries.
- >> Increased share of local gross domestic product generated by net exports.
- >> Increased number of jobs in foreign-owned businesses.

3.3

Improve internal and external perceptions of the region with marketing and outreach programs aimed at attracting and retaining talent and establishing a positive local identity.

- >> Increased placement of news stories and profiles of St. Louis area businesses.
- >> Increased followers on select social media platforms for St. Louis-based economic development, marketing, and chamber of commerce organizations.
- >> Increased “positive stories/mentions” and earned media circulation as reported by the St. Louis Convention and Visitors Commission.
- >> Increased annual visitors to the St. Louis region.
- >> Increased resources spent by the Regional Chamber and the CVC, among others, to promote greater St. Louis.
- >> Increased ratio of jobs within the City and County relative to the rest of the metro area.
- >> Increased views, downloads, or users for online materials provided by the St. Louis Regional Chamber, St. Louis CVC, and other economic development organizations.

GOALS

PERFORMANCE MEASURES

4.1

Continue investing in multi-modal transportation options, trail systems, higher density housing, and walkable communities as means to attract and retain a mobile workforce.

- >> Added overlay and related zoning regulations that incentivize TOD.
- >> Increased ridership on transit facilities.
- >> Increased ratio of transit ridership to automobile commuters.
- >> Increased proportion of households aged 35 or younger with at least a bachelor's degree.
- >> Increased population in targeted areas and/or near transit stations.

4.2

Develop systems and partnerships that better link educational resources with employment opportunities.

- >> Increased jobs fairs and participation rates.
- >> Increased direct hires from workforce development centers, vocational schools, technical institutes, and community colleges.

4.3

Develop and expand workforce development programs that focus on technical education, especially for individuals living in disadvantaged communities.

- >> Increased share of the workforce with bachelor's degrees.
- >> Increased job advertisements for STEM-related jobs.
- >> Increased participation rates at area workforce development centers.
- >> Increased number of individuals with at least an associate's degrees in Promise Zone
- >> Increased proportion of households earning more than \$35,000 annually in Promise Zone.

4.4

Create talent attraction and retention programs for higher educated and skilled individuals.

- >> Improved number and attendance at events designed to encourage college students to learn about and remain in greater St. Louis.
- >> Increased net migration for persons 25-34 years old.

STRATEGY 4

Developing Our Workforce

GOALS

4.5

Accelerate opportunities for the region's foreign-born populations.

PERFORMANCE MEASURES

- >> Increased ratio of foreign-born and minority populations in the labor force.
- >> Increased rate of foreign immigration.

4.6

Develop comprehensive STEM and early education resources and curricula to create a prosperous future workforce.

- >> Improved STEM-related scores on national exams taken by area youth.

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SECTION 7

ACTION PLAN

The Action Plan is the culmination of the initial technical review of existing plans, regional profile, and benchmarking and direct input from the CEDS Strategy Committee. Over four working sessions, the Strategy Committee assisted with the refinement of the SWOT analysis, development of the vision and goals, and identification of specific policies, programs, and investments to support implementation.



Action Plan Framework

The Action Plan was essentially built from the bottom up. The technical review of existing plans, analysis of demographic and economic data, benchmarking, and completion of the vacant land inventory all contributed to an initial outline of the strengths, weaknesses, opportunities, and threats (SWOT) of St Louis City, County, and region. After refinements of the SWOT analysis from direct feedback from the Strategy Committee, this formed the basis for the Vision and Goals, or using EDA's terminology "defining regional expectations".

After the second working session with the Strategy Committee the vision, strategies and goals began to take shape in accordance to EDA's "Plan of Action" specifications (see description to the right). In order to best realize the collective vision of building upon the region's creative capacity and assets to grow the economy and promote equitable opportunity for all residents, four high level strategies were developed:

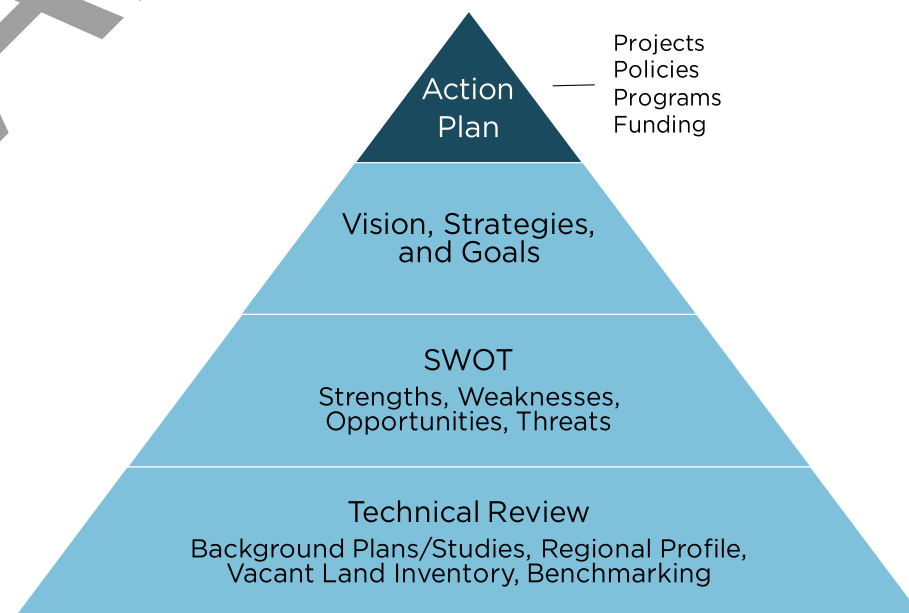
1. Investing in Infrastructure and Real Estate Development
2. Supporting Entrepreneurship and Innovation
3. Leveraging our Assets
4. Developing our Workforce

Within these strategies, dozens of goals were then developed, again supported by the SWOT analysis. Based on input from the final working session with the Strategy Committee and follow-up conversations with key representatives from St. Louis Development Corporation, St. Louis Economic Partnership, and St. Louis County government, specific projects, policies, programs, and other activities were identified as a means for pushing the goals forward. The Action Plan is thus a culmination of existing plans and analysis and direct feedback from key stakeholders, but more importantly, it is well-aligned with regional assets, policies, and governance structures with activities that are tangible and feasible.

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According to the US Economic Development Administration, the CEDS "Plan of Action" should incorporate the following:

- Promotes economic development and opportunity;
- Fosters effective transportation access;
- Enhances and protects the environment;
- Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy;
- Promotes the use of technology in economic development, including access to high-speed telecommunications;
- Balances resources through sound management of physical development;
- Obtains and utilizes adequate funds and other resources.



STRATEGY 1

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.1: Stimulate investment in North St. Louis City, North St. Louis County, and the Mississippi and Missouri Riverfronts by supporting catalytic development and redevelopment with major infrastructure improvements and upgrades.

GOAL 1.2: Improve regional connectivity and reduce vehicle miles traveled by expanding multi-modal transportation options and adjusting land use and development incentive policies.

GOAL 1.3: Increase private real estate values, stimulate future investment and redevelopment, and provide multi-modal transportation opportunities through streetscape improvements, road diets, and appropriate street designs.

GOAL 1.4: Promote “smart technology” and innovation to ensure stable energy and information networks for regional economic and job growth.

GOAL 1.5: Increase access to the region’s natural amenities and recreational opportunities by supporting the implementation of the regional greenways and trails system.

GOAL 1.6: Support a variety of additional infrastructure improvements that increase access and safety for pedestrians and vehicles and further reduce barriers to pedestrian and bicycle connectivity.

REAL ESTATE DEVELOPMENT

GOAL 1.7: Leverage the redevelopment potential of Lambert-St. Louis International Airport.

GOAL 1.8: Stimulate sustainable infill development by leveraging existing and future transit nodes and emphasizing the redevelopment of obsolete commercial corridors.

GOAL 1.9: Develop shared regional data and administrative systems to promote real estate development and reinvestment activity.

STRATEGY 2

Supporting Entrepreneurship and Innovation

GOAL 2.1: Leverage existing, or promote creation of new, tax credit programs, lending or other funding programs that support entrepreneurs and the small business community.

GOAL 2.2: Continue providing resources to nurture high-growth startups and technology firms in the region.

GOAL 2.3: Support talent, innovation, and entrepreneurship for young professionals.

GOAL 2.4: Expand opportunities for minority- and women-owned businesses.

GOAL 2.5: Continue expanding the St. Louis region as a hub for agriculture and bio-science innovation and technology through the global plant science corridor.

STRATEGY 3 > Leveraging our Assets

GOAL 3.1: Support and/or target business retention and expansion.

GOAL 3.2: Improve regional, national, and international connections for business growth.

GOAL 3.3: Improve internal and external perceptions of the region with marketing and outreach programs aimed at attracting and retaining talent and establishing a positive local identity.

STRATEGY 4 > Developing our Workforce

GOAL 4.1: Continue investing in multi-modal transportation options, trail systems, higher density housing, and walkable communities as means to attract and retain a mobile workforce.

GOAL 4.2: Develop systems and partnerships that better link educational resources with employment opportunities.

GOAL 4.3: Develop and expand workforce development programs that focus on technical education, especially for individuals living in disadvantaged communities.

GOAL 4.4: Create talent attraction and retention programs for higher educated and skilled individuals.

GOAL 4.5: Accelerate opportunities for the region's foreign-born populations.

GOAL 4.6: Develop comprehensive STEM and early education resources and curricula to create a prosperous future workforce.

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.1

Stimulate investment in North St. Louis City, North St. Louis County, and the Mississippi and Missouri Riverfronts by supporting catalytic development and redevelopment with major infrastructure improvements and upgrades.

1. Implement the St. Louis Regional Freight District Plan to reinforce the St. Louis region as a primary national and international multi-modal shipping and logistics hub.

ST. LOUIS CITY

- Complete the upgrades to the St. Louis Municipal River Terminal and supporting facilities and access routes.
- Replace the Merchants Railroad Bridge on the north Mississippi Riverfront per plans of the Terminal Railroad Association.
- Initiate planning and engineering for replacement of the MacArthur Railroad Bridge on the south Mississippi Riverfront.
- Initiate and complete plans for redevelopment of the to-be-former NGA site on the south Mississippi Riverfront in order to achieve seamless transition to future uses.
- Redevelop the former Solutia industrial site in south St. Louis.

ST. LOUIS COUNTY

- Implement I-270 improvements from Lilac Avenue to Lindbergh Boulevard in Missouri.
- Implement Boeing Composite Center Access Improvements (Banshee and other roadways, and rail) in Berkeley, Missouri.
- Expand rail capacity of the Class I railroad companies to achieve better and more efficient access to industrial sites throughout the region.

REGIONAL/ CITY-COUNTY

- Develop Missouri River port to enhance trade.
- Create additional, and improve existing, intermodal transfer points involving rail, river, and road freight movements.
- Replace the I-270 Mississippi River Bridge.



2. Relocate the National Geospatial-Intelligence Agency (NGA) from the south Mississippi Riverfront to northwest downtown edge. Retain 3,100 jobs, with the potential for doubling that capacity; and leverage NGA development site with Stan Musial Veterans Memorial Bridge and related road improvements as anchor on near north side for additional housing, health care services, retail stores, office space, and industrial buildings.

**ST. LOUIS
CITY**

- Leverage NGA development site with Stan Musial Veterans Memorial Bridge and related road improvements to stimulate development of new housing, health care services, retail stores, office space, and light industrial buildings.
- Construct a full highway interchange at I-64 and Jefferson Avenue to accommodate increased commuting traffic to NGA and study the resulting need for adjustments to adjacent interchanges due to this addition of capacity.
- Construct streetscape and bike-pedestrian improvements to serve the surrounding neighborhoods and provide alternatives for commuting and recreation.
- Construct Cass Avenue street improvements from the Stan Musial Bridge exit west to Jefferson Avenue (Phase 1) and to Grand Boulevard (Phase 2).
- Construct Jefferson Avenue/Parnell Street improvements from Interstate 64 to St. Louis Avenue (Phase 1), from St. Louis Avenue to Natural Bridge Road (Phase 2), and from Interstate 64 south to Interstate 44 (Phase 3).

3. Implement infrastructure improvements specified in the 2011 North Riverfront Commerce Corridor Land Use Plan.

**ST. LOUIS
CITY**

- Pursue a variety of infrastructure improvements to support the implementation of the North Riverfront Commerce Corridor Plan.
- Reconstruct Hall Street (Route H) from East Grand Avenue north to Riverview and from Riverview to Interstate 270.
- Reconstruct Branch Street from the Mississippi River levee to Old North St. Louis to include pedestrian and bicycle improvements.
- Construct streetscape and bike/pedestrian improvements on North Broadway.
- Improve all of the grade-level railroad crossings to increase safety and enhance truck movements.

Investing in Infrastructure and Real Estate Development

(continued from previous page)

4. Implement the *2015 North Riverfront Redevelopment and Open Space Plan* (Eads Bridge to Musial Bridge, North Broadway/I-44 to Mississippi River).

ST. LOUIS CITY

- Pursue infrastructure improvements as required to support development of the North Riverfront; from Eads Bridge to Stan Musial Veterans Memorial Bridge, from North Broadway/I-44 to River.
- Complete land assembly on formerly proposed stadium site to attract potential development opportunities.
- Construct the open space and trail connections per the upcoming Great Rivers Greenway Riverfront Parks Plan, together with planned infrastructure improvements, between Arch Grounds and North Riverfront Trail to support market-based development.



INFRASTRUCTURE

GOAL 1.2

Improve regional connectivity and reduce vehicle miles traveled by expanding multi-modal transportation options and adjusting land use and development incentive policies.

1. Expand public transit lines, modes, and facilities in order to provide equitable-access to a wider range of transportation options and better access to jobs and housing for all citizenry in the St. Louis region.

- ST. LOUIS CITY**
 - Complete engineering and economic development studies for the proposed Northside-Southside MetroLink alignment in the City of St. Louis.
 - Initiate the environmental planning (EIS) / (NEPA) phase (and any additional planning studies in support) of the Northside-Southside Fixed-Guideway Transit from Downtown St. Louis.
 - Initiate the environmental planning (EIS) / (NEPA) phase of the St. Louis Streetcar Project (established in the St. Louis Streetcar Study).
 - ST. LOUIS COUNTY**
 - Complete engineering and economic development studies for MetroLink expansion in St. Louis County.
 - REGIONAL/ CITY-COUNTY**
 - Collaborate with Bi-State Development/Metro to implement major components of *Moving Transit Forward!*
 - Improve bus experience (shelters, amenities), frequencies, fewer stops, smaller capacity vehicles for faster operation for a variety of locations through the City of St. Louis and St. Louis County.
 - Initiate the environmental planning (EIS) / (NEPA) phase and any additional planning for Bus Rapid Transit alignments.
 - Implement Bus Rapid Transit (BRT) plans from north, west, and south St. Louis County to Downtown St. Louis.
 - Implement common payment system for Metro buses, MetroLink, streetcars, taxis, bike sharing, and both public and private parking facilities.
- 2. Create a region-wide land use /transportation plan and financing review system broader than vehicular transportation networks as is now the responsibility of East-West Gateway Council of Governments.**
- 3. Develop voluntary and pilot policies supporting more sustainable land use patterns and urge that they be incorporated into zoning and related land use regulatory ordinances, such as form-based codes and compact development regulations.**
- 4. Adjust real estate and development incentive programs that encourage more efficient use of land and increase walkability by requiring transit-supportive densities, mixing-of-uses, and other land use best management practices.**

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.3

Increase private real estate values, stimulate future investment and redevelopment, and provide multi-modal transportation opportunities through streetscape improvements, road diets, and appropriate street designs.

1. Invest in virtually all of the Downtown St. Louis streets to improve the quality of the place for attracting visitors, residents, and new business development, as part of the Downtown Development Action Plan and other downtown planning efforts, including specifically:

ST. LOUIS CITY

Downtown Street & Streetscape Improvements

- 7th Street: Washington Avenue to Walnut Street
- 8th Street: Washington Avenue to Chouteau Avenue
- 14th Street: Cass Avenue to Chouteau Avenue
- 22nd Street: Market Street to Dr. Martin Luther King Drive
- Broadway Street: Cole Street to Chouteau Avenue
- Chouteau Avenue: Wharf Street to Jefferson Avenue
- Clark Avenue: 4th Street to 18th Street
- Market Street: Memorial Drive to Jefferson Avenue
- Pine Street: 4th Street to 18th Street
- Spruce Street: 8th Street to Tucker Boulevard
- Tucker Blvd: Washington Avenue to Chouteau Avenue
- Washington Avenue: Tucker Boulevard to Jefferson Avenue



2. Implement a wide range of corridor and neighborhood improvements in the City of St. Louis, including specifically:

ST. LOUIS CITY

- The Skinker-DeBaliviere Neighborhood Urban Design & Development Plan.
- The Grand Center Great Streets Master Plan.
- South Grand Improvements (phased, Utah Street to Carondelet Park).
- Gravois Avenue / Tucker Avenue Streetscapes (phased, Civic Center to Hampton Loop).
- South Jefferson Avenue / South Broadway (phased, Meramec Street to Russell Boulevard).
- Chippewa Street Improvements (phased, South Jefferson Avenue to the River Des Peres).
- Morgan Ford Road Streetscape (Tower Grove Park to Fyler Avenue).
- North Broadway corridor improvements in the Baden neighborhood (coordinated with *North Riverfront Commerce Corridor Plan*).
- Goodfellow Road corridor improvements (I-70 to Natural Bridge Road).
- Natural Bridge Road corridor improvements (Goodfellow Road to North Grand Avenue).
- Goodfellow Boulevard Streetscape (phased, Delmar Boulevard to West Florissant Avenue).
- Natural Bridge Avenue / North Florissant Improvements (phased, coordinated with BRT/METRO).
- Dr. Martin Luther King Jr Drive / Cass Street Improvements (phased, North Tucker Boulevard to the Rock Road Loop).
- North Grand Avenue Streetscape (phased, Page Avenue to West Florissant Avenue).
- The Forest Park Southeast (FPSE) Neighborhood Plan, *A Vision for the Forest Park Southeast Neighborhood*

3. Implement key projects from the Arch-Laclede's Landing Station Area Transit-Oriented Development Plan, and subsequent studies relative to the north riverfront, including:

ST. LOUIS CITY

- 1st Street: Dr. Martin Luther King Drive to Arch Grounds
- 2nd Street: Dr. Martin Luther King Drive to Morgan Street
- Lumiere Place Boulevard (3rd Street): Laclede's Landing Boulevard to Arch Grounds
- Dr. Martin Luther King Drive: Leonor K. Sullivan Boulevard to Lumiere Place Boulevard (3rd Street)
- 1st Street: Dr. Martin Luther King Drive to Arch Grounds
- 2nd Street: Dr. Martin Luther King Drive to Morgan Street

STRATEGY 1:

Investing in Infrastructure and Real Estate Development

(continued from previous page)

ST. LOUIS CITY

- Lumiere Place Boulevard (3rd Street): Laclede's Landing Boulevard to Arch Grounds
- Dr. Martin Luther King Drive: Leonor K. Sullivan Boulevard to Lumiere Place Boulevard (3rd Street)
- Laclede's Landing Boulevard: Leonor K. Sullivan Boulevard to Lumiere Place Boulevard (3rd Street)
- Morgan Street: Leonor K. Sullivan Boulevard to Lumiere Place Boulevard (3rd Street)
- Lucas Avenue: Leonor K. Sullivan Boulevard to Lumiere Place Boulevard (3rd Street)
- Reopen and add street improvements on Lucas Avenue from 2nd Street to 3rd Street
- Cobblestone streets to be reconstructed, including:
 - ◊ 2nd Street (Morgan Street to Laclede's Landing Boulevard)
 - ◊ 1st Street (Eads Bridge to Laclede's Landing Boulevard)
 - ◊ Morgan Street (3rd Street to Leonor K. Sullivan Boulevard)
 - ◊ Lucas Ave (2nd Street to Leonor K. Sullivan Boulevard)
 - ◊ Commercial Street (Eads Bridge to Laclede's Landing Boulevard)
 - ◊ Commercial Street: Carr Street to Arch Grounds

4. Enhance neighborhood amenities in targeted areas of St. Louis County including access to education and employment, as well as aesthetic and functional upgrades to community placemaking.

ST. LOUIS COUNTY

- Implement 2016-2020 Complete Streets Transit Connections Program.
- Continue implementation of St. Louis County Complete Streets Initiative.
- Implement West Florissant Great Streets project beginning with design work in 2016.
- Implement Gravois Road (River Des Peres to Mackenzie Road) Great Streets Initiative.
- Implement Lemay East of Broadway Neighborhood Master Plan.
- Implement Spanish Lake Bellefontaine Road Retail Study & Redevelopment Strategies.
- Update and implement St. Louis County Bicycle Policy.
- Update and implement St. Louis County Sidewalk Policy.
- Implement the Page Avenue Great Streets Plan.
- Partner with Great Rivers Greenway to construct a greenway on Page Avenue in the Pagedale Town Center.



5. Preserve and improve existing infrastructure to promote safer, more efficient, and multi-modal transportation systems.

ST. LOUIS CITY

- Replace or repair the Compton Avenue bridge deck over Mill Creek rail yard.
- Replace or repair the Lindell-Union bridge at Forest Park Parkway over the MetroLink tracks (two bridge structures).
- Replace or repair the Grand Drive bridge over Forest Park Parkway and MetroLink (two bridge structures).
- Remove the Forest Park Parkway Underpass at Grand Avenue and construct an at-grade intersection.

ST. LOUIS COUNTY

- Implement Roadway Resurfacing throughout St. Louis County.
- Implement 2016 Concrete Replace Program in St. Louis County.
- Implement 2017-2020 Concrete Replacement/Mill and Overlay in St. Louis County.
- Implement 2016-2020 County Road System (CRS) Collector Overlay.
- Implement 2016-2020 County Road System (CRS) Pavement Improvement Program.
- Implement 2016-2020 County Arterial Road System (ARS) Crackseal Program.
- Implement 2016-2020 County Arterial Road System (ARS) Pavement Improvement Program.
- Implement 2016-2019 County Transportation Alternatives Program.
- Implement 2016-2020 ADA County Improvements Program.
- Implement identified bridge projects throughout St. Louis County, including replacement, safety improvements, and signal upgrades.
- Implement 2016 Intelligent Transportation System (ITS) Program in identified areas throughout St. Louis County.

6. Evaluate, prepare or update plan for neighborhoods across the region including Downtown, the Central Corridor to I-170.

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.4

Promote “smart technology” and innovation to ensure stable energy and information networks for regional economic and job growth.

1. Develop and expand gigabit broadband infrastructure to improve access to high speed connections throughout the region and promote economic growth.
2. Assess State of Missouri guidelines and regulations to support “Smart City” technology to ensure the implementation process is allowed and provides incentives as appropriate.
3. Integrate smart technology into infrastructure planning, development, and maintenance, especially in areas targeted for economic development.
4. Institute a planning effort to identify “Smart City” infrastructure that is desired for the City to enhance security, improve municipal services, and provide environmentally conscious solutions for City services, connect all “Smart City” technology to a big data system, and provide free public WiFi.
5. Initiate “Smart City” infrastructure improvements to support NGA with crucial spillover and multiplier effects on enhancing security in the area, improving the delivery of City services, and providing publicly available internet service.
6. Initiate Capital Asset Master Planning/Space Planning for St. Louis County government facilities.
7. Continue regular Facility Condition Assessments for St. Louis County government facilities.
8. Promote and implement Energy Efficient Mechanical and Lighting System Upgrades for St. Louis County government facilities.
9. Support programs like PACE as an effective way to finance energy efficiency, renewable energy, and water conservation upgrades to buildings.

GOAL 1.5

Increase access to the region's natural amenities and recreational opportunities by supporting the implementation of the regional greenways and trails system.

1. Continue to support and partner with Great Rivers Greenway on the implementation of the *River Ring Master Plan*.
2. Continue to support the implementation of the Gateway Bike Plan (including Phase III) to increase multi-modal commuting opportunities and access to public parks and amenities.
3. Continue to implement the Complete Streets policy in both the City and the County through collaboration with local leadership and municipal departments.
4. Implement final leg of River Des Peres Greenway (Phase 7) linking Francis R. Slay Park at Ellendale Avenue to Forest Park which serves as a connecting hub for the Centennial Trail, St. Vincent Greenway, and the Midtown Loop.
5. Develop a greenway in St. Louis County's Ag Tech District.

Investing in Infrastructure and Real Estate Development

INFRASTRUCTURE

GOAL 1.6

Support a variety of additional infrastructure improvements that increase access and safety for pedestrians and vehicles and further reduce barriers to pedestrian and bicycle connectivity.

1. Support initiatives to increase pedestrian safety, as noted in the Promise Zone goals.
2. Support initiatives to increase bike safety (ie. TrailNet's protected bikeways initiative).

GOAL 1.7

Leverage the redevelopment potential of Lambert-St. Louis International Airport.

1. Focus early *Freight District Plan* implementation on and around the airport to substantially increase use of the airport to spread operational costs among more cargo flights.
2. Increase international cargo operations at the airport both to improve revenue potential and to encourage eventual increases in international passenger travel.

ST. LOUIS CITY

ST. LOUIS COUNTY

- Use the Roadway of Opportunity document to determine airport development.
- Support the Metro St. Louis Export Plan development by the World Trade Center of St. Louis.
- Obtain necessary state and local legislation to incentivize development on and immediately surrounding Lambert-St. Louis.
- Build out Northpark to the east of Lambert-St. Louis International Airport.
- Prepare the buy-out area west of Lambert-St. Louis International Airport for business development that will generate cargo traffic at the airport.
- Support commercial and industrial development northwest of the airport.
- Enhance access by improving Fee Fee Road Bridge and upgrading Gist Road with additional lanes.
- Support Lambert-St. Louis International Airport's creation of a Dual Customs Clearance facility, working with the country of Mexico to fast track customs clearance and increase two-way trade.

Investing in Infrastructure and Real Estate Development

REAL ESTATE DEVELOPMENT

GOAL 1.8

Stimulate sustainable infill development by leveraging existing and future transit nodes and emphasizing the redevelopment of obsolete commercial corridors.

1. **Secure and diversify private, philanthropic, federal, state, and local funding for public transportation projects, such as MetroLink, MetroBus, Bus Rapid Transit (BRT), and the St. Louis Streetcar.**
2. **Fully support, and assist in obtaining implementation funding for, the MetroLink alignment planning studies in the Northside-Southside corridor, the Metro North corridor, the Daniel Boone Corridor, and the Metro South Corridor.**
3. **Consider development of TOD incentive programs in St. Louis City and County.**
4. **Sponsor regular programs and conferences to inform and encourage growth in the TOD “industry” among real estate developers.**
5. **Support continued eastward expansion of the University City Loop area to and east of the Delmar station**

ST. LOUIS CITY

- Implement the Delmar Loop Station Area TOD Plan
- Implement Skinker-Debaliviere Neighborhood Urban Design & Development Plan
- Interface with the Loop Streetcar network.

6. **Emphasize TOD by implementing various plans prepared for areas around MetroLink Stations.**

ST. LOUIS CITY

- Place high priority on mixed-use redevelopment of the Forest Park station area including a parking structure to accommodate more vehicles than the surface lot supports today, street-level retail, and hundreds of additional housing units both as part of the parking structure and north to as far as Delmar Boulevard.
- Assure that the new Cortex MetroLink station is completed as planned.
- Work with Saint Louis University (SLU) to create a mixed-use development plan for the Grand MetroLink station that better links the station to the two campuses of SLU.

ST. LOUIS CITY

- Fully participate in support of plans for renovation and rejuvenation of the activities in and around Union Station, taking advantage of the existing MetroLink station.
- Leverage the multi-modal transportation center at the Civic Center MetroLink station to accommodate, at the least, more bus routes and the St. Louis streetcar/MetroLink extension to the south of Downtown.
- Assist in completing all phases of Ballpark Village and redevelopment of Cupples Station sites to leverage the Stadium Station area.
- Assure that the Eighth & Pine MetroLink Station is maintained at full capacity and high quality to serve the burgeoning housing and office market in the Old Post Office District of Downtown.
- Study the potential options for America's Center Convention Complex site to attract more visitors to the growing number of attractions and dining places surrounding the Convention Center MetroLink station.
- Finalize and construct mixed-use plans for the parking area and adjacent sites at the North Hanley MetroLink station.
- Fully support the efforts of Beyond Housing to implement the TOD plans for the Rock Road station.
- Complete the industrial and housing components around the Wellston station to conform to the recently completed Choice Communities plan and other job creating opportunities.

ST. LOUIS COUNTY

7. Target St. Louis County economic development priorities where substantial planning is underway.

ST. LOUIS COUNTY

- Implement the Spanish Lake Bellefontaine Corridor Retail Study & Redevelopment Strategies.
- Implement the Lemay Comprehensive Plan.
- Implement master plan for the plant sciences corridor in Creve Coeur and environs, and identify other potential districts and projects.
- Support the redevelopment of the former Northwest Plaza, Jamestown Mall, and Crestwood Court sites.
- Support redevelopment of the former Daimler Chrysler Plant in Fenton.

Investing in Infrastructure and Real Estate Development

REAL ESTATE DEVELOPMENT

GOAL 1.9

Develop shared regional data and administrative systems to promote real estate development and reinvestment activity.

1. Create an asset mapping system to readily identify areas with developable land relative to stable communities and vibrant commercial corridors.

2. Refine and standardize land development and building regulatory codes across all jurisdictions.

REGIONAL/ CITY-COUNTY

- Enable sufficient flexibility and phasing for redevelopment projects.
- Reduce costs of compliance from jurisdiction to jurisdiction.

3. Create a “Vacant and Distressed Property” database and routinely field check for accuracy.

REGIONAL/ CITY-COUNTY

- Use as a basis for revising public policy options toward encouraging redevelopment and re-occupancy of such property.
- Share with the real estate brokerage and development sectors to stimulate private sector interest in large land assembly opportunities.

4. Assemble contiguous vacant and distressed properties into larger development sites suitable for attracting real estate developers.

ST. LOUIS COUNTY

- Develop resources for the demolition of nuisance structures and the maintenance of vacant land.
- Establish processes in St. Louis County to more effectively take possession of derelict, tax delinquent properties.

REGIONAL/ CITY-COUNTY

- Use assembled property sites as incentives for attracting redevelopers.
- Prepare community-based redevelopment and highest-and-best-use plans to guide redevelopment on the assembled sites.
- Coordinate with other organizations and jurisdictions to identify alternate and complementary uses of the assembled land (e.g., Metropolitan Sewer District’s initiative to use vacant land for absorbing and storing storm water).

Supporting Entrepreneurship and Innovation



GOAL 2.1

Leverage existing, or promote creation of new, tax credit programs, lending or other funding programs that support entrepreneurs and the small business community.

1. Utilize investment tax credits to develop a source of start-up investment funds to attract and retain entrepreneurs and support related construction and real estate projects.
2. Develop additional programs to increase business and entrepreneurialism throughout the St. Louis region, including the addition, expansion, and retention of business.

ST. LOUIS CITY

- Develop incentive program and tenanting strategy to target business expansion in vacant spaces in Downtown St. Louis and throughout the City.

REGIONAL/ CITY-COUNTY

- Support increased efforts to fill vacancies in existing office buildings in Downtown St. Louis.
- Create fast track programs for business development (expansion, new location).

3. Increase financing programs for small businesses, including flexibility in financial offerings.
4. Use Section 108 funding as a loan tool for small businesses.
5. Continue support of state-funded On-the-Job Training Program.
6. Support the Missouri Extension Workshops offered at Career Centers that focus on entrepreneurship and small businesses.
7. Provide assistance with site selection as businesses grow and transition.
8. Offer incubator graduates assistance with the next phases of the business evolution.
9. Create clean and safe environments for small businesses to grow and flourish.
10. Support programs that provide legal information for persons interested in starting a business.

Supporting Entrepreneurship and Innovation

GOAL 2.2

Continue providing resources to nurture high-growth startups and technology firms in the region.

1. Concentrate on similar and compatible economic sectors to encourage more cross-entrepreneurship (e.g., Danforth Center, Helix Center, Cortex, T-Rex).

REGIONAL/ CITY-COUNTY

- Create community development organizations that will target and foster innovation and qualities that innovation districts need.
- Create more public-private-philanthropic partnerships.
- Create more innovation districts.
- Sponsor a “St. Louis Shark Tank” to attract wealthy investors to St. Louis entrepreneurs.
- Sponsor “Ted Talk” presentations on innovation.
- Assist and expand micro lending/financial industry programs directed toward innovation.
- Dedicate funding for infrastructure needs identified in the Ag Tech District Innovation Hub Plan.

2. Expand, attract, and reinforce innovation and investment funds for:

REGIONAL/ CITY-COUNTY

- Start-up and in-between programs (resources + space), and co-working spaces.
- Promoting and attracting Innovative business/industry (regional sharing/benefits).
- Micro-lending programs.
- Educational/institutional collaboration around industry clusters.
- Curriculum to include entrepreneurship.
- Fashion incubators (entrepreneurship/manufacturing): link small run manufactures to the fashion industry.



GOAL 2.3

Support talent, innovation, and entrepreneurship for young professionals.

1. Enhance programs that assist young entrepreneurs in creating business plans.
2. Expand the use of social media to communicate as broadly and frequently as possible with young professionals.

DRAFT

Supporting Entrepreneurship and Innovation

GOAL 2.4

Expand opportunities for minority- and women-owned businesses.

1. Expand outreach to minorities and women to increase the percentage of contracts awarded to minority and women-owned businesses.
2. Advertise and provide workshops to educate minorities and women business owners about potential opportunities.
3. Coordinate an effort to improve and strengthen Section 3 programs run by St. Louis County, St. Louis County Housing Authority, Lambert-St. Louis International Airport, City of St. Louis, and St. Louis Housing Authority.
4. Support the Missouri Extension Workshops offered at Career Centers that focus on entrepreneurship and small businesses.
5. Increase efforts to recruit minorities to County owned small technology-oriented incubators that have ties to funding and mentoring programs.
6. Create a fund offering patient capital to create sustainable businesses in minority communities to include the NGA site.
7. Fund scholarships for midlevel minority entrepreneurs to receive advance training in business principles at area community colleges, colleges, and universities.
8. Create incentives for minority and majority companies to partner and form joint ventures on projects utilizing City funds or that receive public assistance.
9. Continue to invest in compliance software designed to improve the ability of the City to better monitor and account for MWBE spending on contracts and professional services.
10. Encourage the creation of peer and mentorship networks for, and serve as clearinghouse of consolidated information related to, minority and woman business enterprises.
11. Advocate for minority and women business enterprise firms at the regional level with elected officials, educators, bankers, community leaders, and business corporations.



GOAL 2.5

Continue expanding the St. Louis region as a hub for agriculture and bio-science innovation and technology through the global plant science corridor.

1. Support BioStL's 2016 vision to continue promoting the growth of the biotechnology industry in the St. Louis region.
2. Support the continued implementation of the projects in the *Cortex Master Plan*.
3. Support the Ag Innovation District and Danforth Center.

DRAFT

Leveraging Our Assets

GOAL 3.1

Support and/or target business retention and expansion.

1. **Engage proactively with businesses to provide support and assistance as they need resources to ensure business retention, expansion, job creation (increase finances, identify sites, assist with site selection), reduce and eliminate barriers.**
2. **Pursue designation as a Certified Work Ready Community.**
3. **Continue support of state-funded On-the-Job Training Program.**



GOAL 3.2

Improve regional, national, and international connections for business growth.

1. Attract direct, non-stop flights from St. Louis to Europe, Asia, and other major international airports.

REGIONAL/ CITY-COUNTY

- Conduct comprehensive study to document the market demand for such flights.
- Expand efforts to encourage airlines to conduct international flights.
- Continue partnering with Lambert-St. Louis International Airport for international cargo activity, including live animal exports and dual customs approvals with Mexico.

2. Increase the number of successful EB5 foreign investments and otherwise expand EB5 presence.

3. Launch St. Louis' first foreign direct investment (FDI) program.

4. Implement Metro St. Louis' first *Export Plan* in cooperation with the Brookings Institution and JPMorgan Chase.

5. Assist the Convention and Visitors Commission with necessary changes to America's Center Convention Complex in order to attract more and larger meetings of outside organizations and expose more people to St. Louis.

ST. LOUIS CITY

- Couple these changes with enhanced marketing of and transportation to regional events, entertainment, and dining.
- Investigate strategies that provide opportunities for parking personal automobiles once and getting around.

REGIONAL/ CITY-COUNTY

- Investigate the demolition of The Dome at America's Center to provide additional expansion opportunities.

STRATEGY 3:

Leveraging Our Assets

(continued from previous page)

6. Cultivate Downtown St. Louis retail development as a tourist destination to supplement conventions and sports events.

ST. LOUIS CITY

- Reinforce dense “nodes” of retailers through subsidies, if necessary, and relocations from scattered sites. Mercantile Exchange, Ballpark Village, and some of Washington Avenue are examples.
- Preserve and utilize temporarily vacant storefronts for pop-up shops tailored to conventions and special events.
- Support the Regional Tourism Infrastructure Projects: Scottrade Center, Convention Center, and Major League Soccer (MLS) stadium.

7. Expand the Regional Sports Commission’s marketing campaign outside St. Louis.

REGIONAL/ CITY-COUNTY

- Promote the region as a hub for regional amateur athletics, which attracts families for multiple days.
- Increase collegiate and Olympic-scale athletic tournaments to bring more constant attention to St. Louis.



GOAL 3.3

Improve internal and external perceptions of the region with marketing and outreach programs aimed at attracting and retaining talent and establishing a positive local identity.

1. Conduct a comprehensive study of successful regional promotional programs.

REGIONAL/ CITY-COUNTY

- Consider “global cities” as models.
- Identify campaign strategies.
- Identify sustainable funding resource.
- Prepare first-class marketing program for St. Louis region.

2. Implement a regional beautification strategy.

REGIONAL/ CITY-COUNTY

- Expand, fund, and aggressively manage an Adopt-A-Street Program (like Adopt-A-Highway).
- Conduct a persistent public service campaign to eliminate public trash.
- Support Gateway Greening and similar “green” sustainability programs to expand their educational outreach.

3. Enhance/expand stories from successful business people who have come back or choose to locate in St. Louis.

REGIONAL/ CITY-COUNTY

- Start with Fortune 1000 companies to reinforce the leadership that St. Louis has in these rankings.
- Emphasize the people and companies involved with technology development at the numerous incubators and related support compound.
- Push narratives about companies and people in the regionally-targeted industry clusters.

4. Persistently provide reliable information to “rankings publications” to assure St. Louis makes such lists more often.

REGIONAL/ CITY-COUNTY

- While often statistically faulty, such rankings keep St. Louis top-of-mind.
- The rankings provide St. Louisans, themselves, with conversational topics when with out-of-towners.

STRATEGY 3:

Leveraging Our Assets

(continued from previous page)

5. Continue concerted efforts to help raise awareness and understanding of events, activities, and initiative throughout the region.

REGIONAL/ CITY-COUNTY

- Assure coordination of stories and events lists among organizations that create them.
- Expand the conventional and unconventional methods of distribution through news media, social media, etc.

6. Create and sustain a regional program to reduce racism and the perception of danger/crime.

REGIONAL/ CITY-COUNTY

- Minimize negative stereotypes of urban locations.
- Expand ethnic diversity and awareness programs, festivals, and interactivity.

Developing Our Workforce

GOAL 4.1

Continue investing in multi-modal transportation options, trail systems, higher density housing, and walkable communities as means to attract and retain a mobile workforce.

1. Expand and diversify public transit to address desire for non-motorized transportation options.
2. Implement Great Rivers Greenway's (GRG) bike share plan to better connect City and inner-County neighborhoods and appeal to an urban-oriented workforce wanting alternative modes for commuting and recreation.
3. Support wider adoption of mixed-use and form-based zoning codes that include denser market-rate housing in commercial districts and downtowns throughout the region.

Developing Our Workforce

GOAL 4.2

Develop systems and partnerships that better link educational resources with employment opportunities.

1. Cultivate job creation through improved linkages between education and full-time employment.

REGIONAL/ CITY-COUNTY

- Expand apprenticeships, job shadowing, and internships to retain highly skilled and educated graduates of high schools, colleges, and vocational programs.
- Implement the FULL CIRCLE - SLU/WASHU program modeled on campus Philadelphia.

2. Improve and increase targeted employment and career strategies for:

REGIONAL/ CITY-COUNTY

- Emerging workforce (new workers).
- Transitional workforce (e.g., military veterans, prisoners reentering the community).
- Existing workforce (keeping skills fresh).

3. Expand apprenticeship programs across all of targeted sectors and industry clusters.

4. Expand mentorship and job shadowing that encourages youth to consider rewarding careers.



GOAL 4.3

Develop and expand workforce development programs that focus on technical education, especially for individuals living in disadvantaged communities.

1. Expand technical post-secondary education in the Washington University – Saint Louis University corridor.

REGIONAL/ CITY-COUNTY

- Bolster connections between employers, community colleges, and communities.
- Increase awareness of career opportunities.
- Support efforts of SCOPE 1.
- Bring tech programs into neighborhoods (rec-to-tech) – like LaunchCode, Blue 1647, Code Red.
- Explore creation of apprenticeship models.

2. Collaborate with community colleges, Workforce Investment Boards, workforce development centers, and employers to increase workforce training.
3. Implement evidence-based strategies for hard-to-employ populations.
4. Support the successful operation of St. Louis City and County workforce offices and career centers.
5. Support the United Auto Workers' *Labor Employment and Training Corporation* at Ranken Technical College.
6. Complete the buildout of the MET Center in Wellston and identify other potential opportunities for enhancement and expansion.

Developing Our Workforce

GOAL 4.4

Create talent attraction and retention programs for higher educated and skilled individuals.

1. Increase and support college graduate retention efforts in partnership with universities.

REGIONAL/ CITY-COUNTY

- Work with universities to provide geographic orientation for freshman students.
- Introduce college students to different parts of region, "community as classroom."
- Conduct geographic-based career opportunity tours—jobs based on high quality places.
- Investigate incentives for young professionals to invest (buy homes, start businesses, etc.) in identified opportunity areas (prioritize Promise Zone when possible).
- Increase and support employer-assisted home buyer programs.

2. Fully support the attraction of more foreign immigrants to greater St. Louis who have skills and the education needed for growing business sectors.

REGIONAL/ CITY-COUNTY

- Incorporate the goals, strategies, and actions of the Mosaic Project.
- Support the International Institute of St. Louis in attracting and settling foreign nationals in the St. Louis area both to improve their economic well-being and to add needed population and labor force growth to the region.



GOAL 4.5

Accelerate opportunities for the region's foreign-born populations.

1. Increase foreign-born populations in St. Louis City and County.

REGIONAL/ CITY-COUNTY

- Successfully implement the Mosaic Program and meet its goal of making the St. Louis region the fastest growing metro area for foreign born by 2020.

2. Improve economic opportunities for foreign-born populations.

REGIONAL/ CITY-COUNTY

- Increase the number of professional connections for high-skilled, foreign-born residents.
- Increase the number of immigrant entrepreneurs in business incubators and other resources in the entrepreneurial ecosystem.
- Fill STEM gaps with foreign-born talent.
- Improve job training through better outreach and coordination.
- Support the International Institute's Adult Education program.
- Expand learning and training opportunities to improve the language skills of foreign-born people.

Developing Our Workforce

GOAL 4.6

Develop comprehensive STEM and early education resources and curricula to create a prosperous future workforce.

1. Place special emphasis on science, technology, engineering, and mathematics (STEM) education

REGIONAL/ CITY-COUNTY

- Develop comprehensive programs to strengthen STEM curricula throughout the region's school systems.
- Encourage emphasis also on the Arts (STEAM), including the humanities, to assure well-rounded education for K-12 students.
- Support "St. Louis Promise," which is based on Pittsburgh Promise, a commitment to college-bound students designed to decrease financial & other barriers.
- Expand A+ program in all schools.
- Support initiative to increase minority participation in STEM education (i.e. National Society of Black Engineers, coding programs, and others).

2. Increase access to and funding for early education programs to improve life-long employability.

REGIONAL/ CITY-COUNTY

- Expand various support systems from pre-natal to pre-K and K-12 pipelines.
- Ensure that employed parents have access to quality child daycare at affordable prices.
- Reinforce Head Start funding and other "early start" programs to help children achieve physical and mental goals more quickly and sustainably.
- Consider physical locations for services like schools and short term training: training needs to be placed in communities for maximum reach - neighborhood offices/outreach center.
- Direct more resources to children in high-need neighborhoods.
- Transform recreational centers to technical learning centers (particularly for ages 6+).
- Attract aggressive and successful teaching programs for challenged schools (e.g., Teach for America).
- Fund more after-school programs to ease strain on employed parents and to increase physical and mental education of children.



3. Increase education completion by young adults.

REGIONAL/ CITY-COUNTY

- Provide quality affordable housing to assist families to stay in the home and to provide a stable environment for school-age children.
- Continue to support at-risk and disconnected youth through programs like *Doors to Success*, *Leadership & Resiliency Program*, and the *Center for Youth on the Rise*.
- Support Urban League's in-school program.
- Link curricula of schools and training centers to high growth businesses, particularly in the bio-science, information systems, healthcare, aerospace, advanced manufacturing, and logistics sectors.
- Develop career pathways for high growth business sectors from pre-kindergarten through grade 12.
- Support greater opportunities for adult math and reading literacy.
- Promote early childhood education as a long-term means to develop a skilled workforce.
- Support initiatives to improve third grade reading and math proficiency in targeted communities as a means to improve high school graduation and job readiness.