

STL2030 JOBS PLAN

DRIVING A DECADE OF INCLUSIVE GROWTH • OVERVIEW



NEW
LOCALISM
ASSOCIATES



THE NEXT DECADE PRESENTS AN EXCEPTIONAL OPPORTUNITY FOR THE ST. LOUIS METRO

After decades of economic underperformance, population stagnation and racial division, the 15 counties that comprise the bi-state St. Louis metropolitan area (also known as the St. Louis metro or Metro St. Louis) stand poised to chart a different course, one that combines an increase in quality jobs and heightened global relevance with a steadfast commitment to inclusive growth and racial equity.

In the next ten years, Metro St. Louis can transform itself into a truly 21st-century metro that is powered by strong industry clusters, skilled workers, inclusive workplaces and a healthy urban core. The bi-state metro has the prerequisites for inclusive growth—now is the time to act.

The STL 2030 Jobs Plan sets out a 10-year action plan to lead the nation in inclusive growth by expanding the number of quality jobs available to all St. Louisans, regardless of where in the region they live. Rooted in a thorough quantitative and qualitative assessment of the metro economy, this plan maps out actions that will be needed to eliminate racial disparities in household income, health outcomes and wealth building by building a stronger and more collaborative metro economy.

Domestically and globally, successful metros stand out for their distinctive approaches to economic development. In Copenhagen and Helsinki, it's the green economy. In Cleveland and Pittsburgh, it's next-generation tech sectors.

The vision for the St. Louis metro is no less ambitious—to be nationally recognized by 2030 as a leader on inclusive growth. Regularly tracking progress on five core priorities will inform implementation and keep the metro focused on this objective:



Achieving this vision will require a new model of radical collaboration. Cooperation within and across the public, private, civic and philanthropic sectors must become the norm. Historically excluded voices must be welcomed and empowered to contribute to the conversation. Specific, sustained investments in talent, entrepreneurship, innovation and infrastructure will be essential, as will institutions and intermediaries with capacity, capital and community standing to get things done.

The St. Louis metro has an opportunity to leapfrog past other U.S. metros. With inclusive growth as its north star and the STL 2030 Jobs Plan as its guide, the metro can live up to its potential and improve the lives of all St. Louisans.

WHAT COUNTS AS A QUALITY JOB?

Quality jobs—those jobs that provide a livable wage with benefits—offer the most direct path to economic mobility and broadly shared prosperity. The specifics of this definition vary—the Pew Research Center uses two-thirds of the national median wage as the lower bound, while researchers at the Brookings Institution have focused on jobs that pay at least the metropolitan area's median wage and provide employer-sponsored health insurance (a proxy for other employer-provided benefits such as paid leave and retirement).

The STL 2030 Jobs Plan definition of a quality job—those that pay 80% or more of the national median wage (i.e., \$40,000 or more in 2020)—builds on existing definitions while also accounting for data availability. Given that timely data on employer-sponsored health insurance are not readily available, the definition sets 80% of the national median wage as a floor (both because higher-wage work is more likely to have employer-sponsored health insurance and other benefits and because those earning at least 80% of the median are in a better position to purchase health insurance if not provided by their employer.)



A METRO PLAN TO DRIVE JOB CREATION AND INCLUSIVE GROWTH



Formed at the confluence of two great rivers, the St. Louis metropolitan area has a proud history of innovation, company formation and wealth creation in talent-fueled sectors. But in recent decades, the metro has experienced economic stagnation, population flatlining and political fragmentation. Other places might see these challenges as insurmountable barriers to progress. Not so in Metro St. Louis. A wide range of leaders, stakeholders, and residents are committed to the bi-state metro and optimistic about the future. They agree that it's time to make the St. Louis metro a recognized national leader on inclusive growth.

What is inclusive growth?

Two imperatives confront St. Louis as it begins the 2020s. Given the lagging economic performance of the past decade, boosting economic growth and increasing the volume of high quality, well-paying jobs must be central priorities. But that growth must yield broadly shared prosperity that substantially reduces the racial disparities in household income, health outcomes and wealth building that have held the region back for decades.

Guided by a diverse group of metro stakeholders, we developed a sharp definition of inclusive growth that reflects the unique circumstances of the St. Louis metro:

OUR DEFINITION OF INCLUSIVE GROWTH

Broad-based economic growth that enables all stakeholders in the St. Louis metropolitan area (including residents, workers, entrepreneurs, companies, organizations and communities) to realize their full potential. Such growth enables the widest range of people and places to both contribute to and benefit from economic success.

Inclusive growth aims to produce more prosperity alongside greater equity in opportunities and outcomes by substantially increasing the number of quality jobs and radically reducing racial and spatial disparities in income, health and wealth that have undermined metropolitan performance for decades.

This definition of inclusive growth is grounded in the fact that Black St. Louis metro residents and other people of color have been disproportionately harmed by the region's long history of systemic racism, racial segregation and systematic disinvestment.

The COVID-19 pandemic only intensified the disparities experienced by Black and Brown communities, which have higher incidences of medical pre-conditions due to unequal access to healthcare and face greater risk of repeated viral exposure as a disproportionately high percentage of frontline workers. Likewise, Black- and Brown-owned small businesses have been hit disproportionately hard given that they tend to be under-capitalized, under-banked and over-represented in sectors shut down by quarantine.

At the same time, the COVID-19 pandemic and months of demonstrations for racial and social justice throughout the U.S, following the murder of George Floyd in May 2020 have inspired a renewed sense of determination to address the racial disparities that have plagued our country for generations. As such, this plan pairs broadly inclusive actions with specific remedies centered on increasing opportunity and prosperity in the metro's Black communities. Our plan also calls for greater attention to those from other underrepresented communities, including Brown people, women, individuals with disabilities, veterans and immigrants.

Defining inclusive growth is one thing; achieving it is another. Unlocking the metro's enviable assets and advantages will require a fierce determination to confront the region's painful legacy and present-day realities of systemic racism and racial segregation head on and build trust within and across communities. It demands a fundamental commitment to overcoming fragmentation, embracing collaboration and a willingness to devote time, talent and resources to transformative change. Regular assessment on key metrics will allow the metro to track progress on these twin imperatives and hold stakeholders accountable.

TWIN IMPERATIVES FOR INCLUSIVE GROWTH

In the St. Louis metro, inclusive growth involves two core priorities:

SUBSTANTIALLY INCREASING THE NUMBER OF QUALITY JOBS

This action plan recognizes that there are many ways to boost creation of quality jobs—through advanced industries, anchor institutions, small businesses and startups, communities and residents. It shows how to leverage the metro’s existing strengths across this spectrum in order to spark quality job growth for workers of all skill levels throughout the St. Louis metro.

Advanced industries—those high-value, innovation-intensive sectors known for their productivity and wage premiums—tend to get most of the attention in economic action plans. And with good reason. Healthy metro economies run on strong advanced industries. As the Metro St. Louis bioscience sector has shown time and again, these industries boost economic growth and create jobs that pay well regardless of workers’ level of educational attainment. What’s more, they produce significant multiplier effects that lead to job creation in other sectors. This action plan explains how to strengthen these high-reward clusters as well as how to ensure that historically underrepresented and economically disinvested communities have access to the opportunities that result.

Small businesses also play a vital role in the metro economy. They represent the vast majority of firms in the St. Louis metro and employ almost half of the area workforce. Small businesses form the backbone of civic and community life and represent a tested path to economic mobility and wealth building, particularly for Black and Brown communities. Strategic support for entrepreneurs and small-business owners—particularly Black and Brown people and those from other underrepresented groups—will lead to more quality jobs and greater prosperity that extends into the metro’s most disadvantaged communities.

RADICALLY REDUCING RACIAL AND SPATIAL DISPARITIES IN INCOME, HEALTH AND WEALTH

Quality jobs alone will not be enough. The metro must also take deliberate action to combat the racial disparities in household income, health outcomes and wealth building that have held the metro economy back for decades.

A key part of this work will involve making opportunities accessible to area residents. Job creation must be accompanied by clear career pathways, inclusive workplaces, improved public transit and ongoing support for worker success. Childcare needs, financial insecurity, disability, justice involvement and other challenges should not preclude any metro resident from finding quality work.

By making quality jobs more accessible, supporting student and worker success and taking deliberate action to make workplaces both diverse and inclusive, the metro can fight long-standing disparities and ensure that the metro economy works for everyone.

Why focus on the metropolitan area?

Metropolitan areas are the true organizing unit of the global economy.

Composed of cities and surrounding suburban and rural areas, metros bring together a wide variety of distinctive assets and possibilities that are fit to purpose for a range of industries. Some sectors want to locate in dense urban innovation districts with easy access to research assets, public transit and other amenities. Others prefer large greenfields and business parks set away from the urban core. Metros offer both...and more.

Jurisdictions in successful metros understand that competing against one another will never produce sustainable economic growth. They realize that a win for one part of the metro is a win for the entire metro economy. They know that they are stronger together and collaborate to compete *as a metro against other metros*.

The St. Louis metropolitan statistical area (MSA) represents the true geography of the regional economy. Its contours are mapped by commuting patterns that connect the City of St. Louis to the surrounding suburban and rural areas. The city sits at the heart of the metro where the Missouri and Mississippi Rivers converge. Reflecting its origins as a commercial hub, the metro spans the Mississippi, stretching from Warren and Franklin Counties on the Missouri side to Bond and Clinton Counties in Illinois.

St. Louis is the 20th largest U.S. metro by population, with more than 2.8 million residents. Its size, economic assets and central location make the metro significant in the global marketplace. Its competitors are not within the MSA but beyond its borders, in metros like Nanjing, Hamburg, Toronto and Tel Aviv. St. Louis is a globally competitive metro with tremendous potential—if it decides to take action.

Boosting economic growth and quality job creation across the entire metropolitan area will require targeted investment in the heart of St. Louis proper, because metro economies are only as strong as their urban cores. But it also demands specific efforts to deepen regional industry strengths and revitalize locally owned small businesses throughout the metro. The STL 2030 Jobs Plan attends to both priorities. It invites investment in neighborhoods and Main Streets as well as next-generation industries and innovation-intensive centers of excellence. It pushes for a strong education and training ecosystem to put more St. Louisans on pathways into quality jobs. Each proposed strategy complements and enhances the others, to the benefit of all parts of the metro.



SOME TRUTH-TELLING

The STL 2030 Jobs Plan presents an action plan for inclusive growth that is customized to the on-the-ground realities of the St. Louis metro. In doing so, it does not shy away from the facts. Rather, it is cognizant and clear-eyed about the real systemic challenges facing this grand metropolis.

The St. Louis metro has struggled economically

The region was slow to emerge from the Great Recession. The GDP of the bi-state metro grew by only 5.2 percent between 2008-2018, much slower than the U.S. economy as a whole, which saw nearly 20 percent growth during the same period. Metro St. Louis lagged older industrial economies like Baltimore, Cincinnati and Pittsburgh as well as Heartland growth centers like Denver, Minneapolis and Nashville. Its sluggish economic performance helps explain why regional population growth hovered near zero (0.5 percent) between 2010 and 2018, well below the 5.5 percent average for the nation as a whole. The region's economic struggles have

made it harder for companies to attract talent, for entrepreneurs to start businesses and for households to build wealth.

Decades of racial division and racial disparities have exacted an enormous cost

Systemic racism has seriously compromised the regional economy, limiting its growth in almost every way. Racial disparities in virtually every aspect of the regional economy—including education, workforce training, access to quality jobs and career advancement, pay, leadership opportunities, startup activity and access to capital—harm regional economic growth and, more crucially, limit Black St. Louisans' economic mobility and access to prosperity.

The St. Louis metro is characterized by extraordinarily large areas of low-density, high-poverty Black communities, particularly in and around the urban core.

These concentrations of poverty in North St. Louis City, North St. Louis County, East St. Louis and elsewhere limit residents' access to prosperity and stifle the cycle of development, business growth, job creation and asset building that have increased economic mobility elsewhere in the metro.

Racial segregation has led to decentralization and fragmentation

The mental map that residents and leaders use to describe the St. Louis metro is crosshatched with rigid state, county and city borders and artificially drawn racial boundaries that divide rather than unify the region. This splintered landscape and the region's poor economic performance have created a culture of scarcity. Growth is seen as a zero-sum game that rewards only a few places at the expense of the rest of the metro. For too long, the St. Louis metro has been less than the sum of its parts, a place where $2 + 2 = 3$.

The weakness of the urban core inhibits inclusive economic growth across the metro

The St. Louis metro continues to resemble a 1970's style exit-ramp economy, with major companies located on isolated campuses set away from a declining and depopulated urban core. Systemic racism has distorted the metropolitan geography, undermining tax revenue and property values within the central city while inducing rapid and often segregated population growth outside city limits. The scattered corporate landscape radiates out from the city, limiting talent recruitment and innovation as well as basic access to quality jobs, especially for city residents without reliable access to a car.

Significant talent deficiencies undermine economic performance

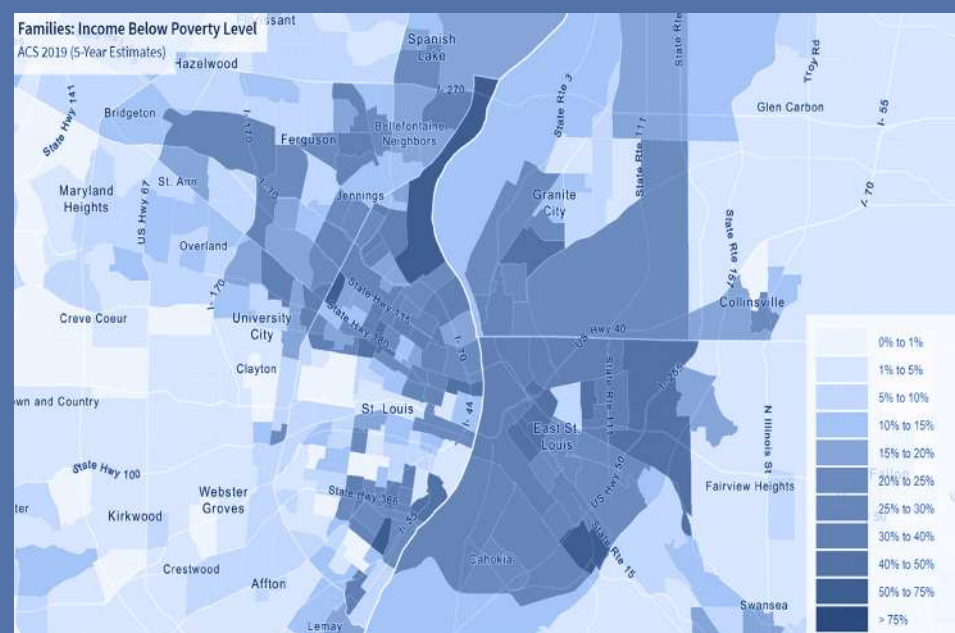
The metro's workforce challenges start at the P-12 level. Too many students attend schools that lack the resources and wherewithal to prepare them for the future. Persistent academic underperformance plagues certain parts of the metro, disproportionately affecting Black students in high-poverty communities such as East St. Louis and North St. Louis. The resulting lack of proficiency in reading, math and other fundamentals acts as a brake on inclusive economic growth by making it almost impossible for students to start on pathways into quality jobs.

At the postsecondary level, lack of alignment between industry and education and training providers has produced relentless competition for skilled workers, to the detriment of the metro economy.

The metro's strong startup scene conceals significant racial gaps in entrepreneurship

In the past decade, the St. Louis metro has built a nationally recognized ecosystem for startups, with particular success in tech and bioscience. But as is true throughout the country, entrepreneurial performance in the metro is replete with racial disparities. While some efforts have focused on creating, funding and scaling Black-owned startups, the overall ecosystem for Black-owned businesses is woefully thin, undercapitalized and primarily reliant on government and nonprofits rather than market investment. Black founders—and especially Black women founders—too often lack access to a consistent customer base, mentors, workspaces, quality capital and other resources needed to start and grow their businesses.

THE ST. LOUIS METRO IS CHARACTERIZED BY EXTRAORDINARILY LARGE AREAS OF LOW-DENSITY, HIGH-POVERTY BLACK COMMUNITIES



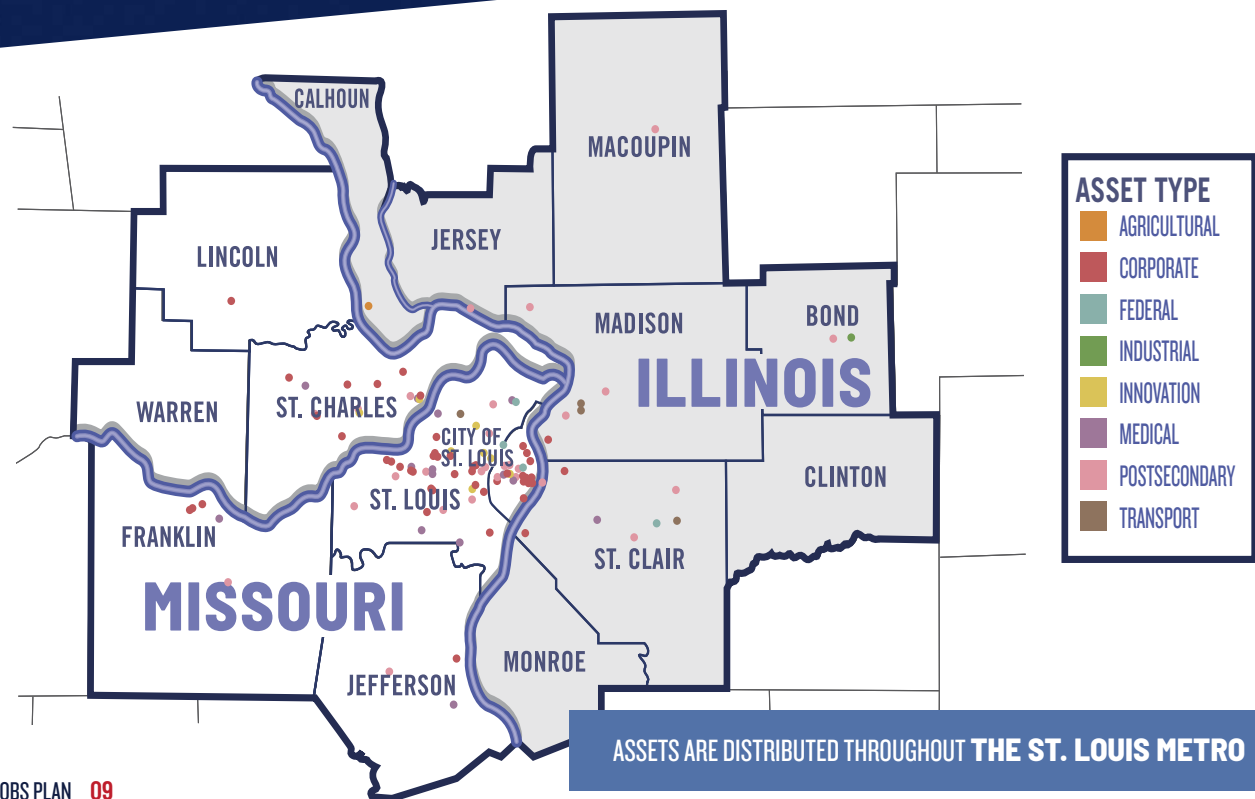
DISTINCTIVE STRENGTHS POWER THE ST. LOUIS METRO ECONOMY

Alongside these challenges, the metro possesses tremendous assets—its industry strengths, its emboldened leadership, its economy-shaping intermediaries, its research capacity, its neighborhood communities, its central location and low cost of living, and most of all, its people.

The St. Louis metro is rich in assets

St. Louisans can be hard on their hometown, but the metro has a solid foundation on which to build. Innovation-intensive industry sectors, a growing startup ecosystem, an affordable cost of living, a national reputation for collective action and more give the metro important competitive advantages that can be leveraged to boost inclusive economic growth.

As the map below shows, these assets are located throughout the metro, with concentrations in a few areas. From Scott Air Force Base, freight logistics hubs and prosperous farmlands in Metro East to the distribution and advanced manufacturing facilities in Missouri's Franklin, Jefferson and St. Charles Counties and the research capabilities of the Cortex Innovation Community and Donald Danforth Plant Science Center, these assets affirm the need for coordination and collaboration across the entire metro.



Specific industry clusters hold great promise

Like all U.S. metros, St. Louis has a distinctive industry profile that grew out of competitive advantages forged in the 19th and 20th centuries. Our analysis identified 5 priority clusters that together account for 40% of the region's employment.

THE ST. LOUIS METRO IS HOME TO FIVE STRONG CLUSTERS THAT HAVE POTENTIAL TO DRIVE GROWTH IN THE FUTURE



ADVANCED BUSINESS SERVICES

A large finance and insurance sector with both retail-banking and investment services

This cluster benefits from close connections to the IT and software industry that advance the growing fintech ecosystem in the metro.



BIOMEDICAL AND HEALTH SERVICES

An advanced biomedical and pharmaceutical cluster that benefits from proximity to medical institutions and bioscience / agtech startups that use technology to create new products and services.



ADVANCED MANUFACTURING & PRODUCTION

A broad cluster of small-scale production and manufacturing.

This cluster includes advanced software engineering, manufacturing, consumer products and food production.



AEROSPACE AUTOMOTIVE & DEFENSE

Anchored by Boeing and GM advanced manufacturing plants, this cluster gives the metro an edge in large-scale manufacturing, servicing and advanced production of defense technology.



TRANSPORTATION AND LOGISTICS

This cluster serves the metro's industries as well as global multimodal freight movement.

It is growing and creating jobs that pay well.

Advanced industries are essential for inclusive economic growth. These sectors produce the exports and innovations that drive growth across the entire metro economy. They also tend to pay higher wages. To take just one example, workers in high-tech industries earn more than they would in a non-high-tech industry, regardless of the skill level required for their role.

The St. Louis metro can boost inclusive growth prospects by targeting these priority clusters with actions that combat spatial and racial divides, increase the number of skilled workers and remove other barriers to growth.

THE ST. LOUIS METRO ECONOMY COULD BE DRAMATICALLY SHAPED BY
THREE NEXT-GENERATION SECTORS

Our analysis also revealed three emerging hybrid sectors that are growing rapidly. The future of the St. Louis metro economy could be dramatically shaped by these three next-generation sectors:



Photos courtesy of Donald Danforth Plant Science Center



FINTECH

Uses technology to increase the efficiency of financial systems and services



GEOSPATIAL

Collects, processes and analyzes data associated with location, with applications ranging from precision agriculture to climate science to public health



AGTECH

Applies a wide variety of technologies to agriculture science and production practices with the aim of improving yield, efficiency, profitability and sustainability

The evolution of the bioscience sector is a strong reason to believe in the St. Louis metro

Over fifteen years ago, civic leaders William Danforth, John McDonnell and others created BioSTL and the Danforth Plant Science Center and launched 21st-century innovation hubs Cortex and 39 North to make the most of the metro's emerging bioscience sector. Today the sector is poised for continued growth, with solid foundations in both traditional biomedical clusters and newer clusters such as pandemic resilience and defense medicine. The sector is evidence of a growing purpose-driven economy in the metro that's intent on addressing global challenges such as climate change and food insecurity.

The metro continues to benefit from an exceptionally effective intermediary, BioSTL, which has built a self-sustaining ecosystem that connects startups, capital, entrepreneurs and skilled workers, physical assets and placemaking investments, policy advocacy, global connections and corporate partnerships in a mutually reinforcing cluster. This ecosystem takes physical form in the Cortex Innovation Community, one of the world's top innovation districts located in the heart of the City of St. Louis.

The success of this cluster shows that the St. Louis metro knows how to build an industry cluster that is globally acknowledged as best in class and poised for substantial growth.

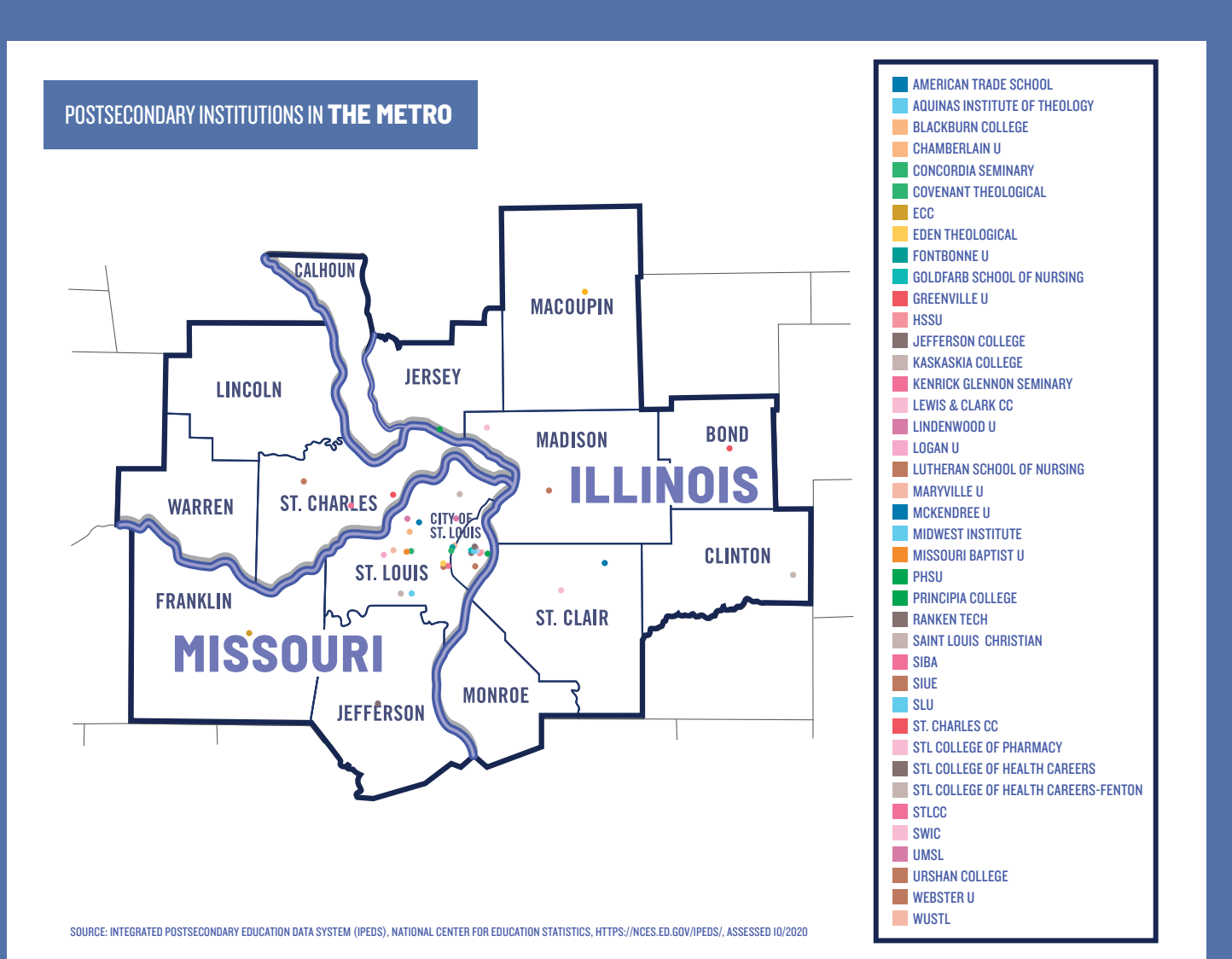
The St. Louis metro is home to a growing mix of entrepreneurs and startup activity

In Metro St. Louis, startups benefit from a healthy and supportive ecosystem. Over the past decade, a growing network of incubators, accelerators and organizations have made the St. Louis metro a strong platform for tech-enabled startups that cross multiple sectors, delivering a broad continuum of capital to a diverse array of entrepreneurs and enterprises.

A wide range of organizations contribute to this supportive startup culture. Arch Grants makes equity-free grants to local early-stage firms and connects grantee founders to a rich ecosystem of entrepreneurial supports in the region. The Metro East Startup Challenge has catalyzed entrepreneurship on the east side of the metro. T-REX offers affordable office space, programming for entrepreneurs and easy access to entrepreneurial support organizations at its flagship facility in downtown St. Louis. OPO Startups plays a similar role for founders in St. Charles. BioSTL and its BioGenerator investment arm connect bioscience founders to capital and expertise. And newer entities like Invest STL, WEPOWER, Dream Builders 4 Equity and the St. Louis Equity in Entrepreneurship Collective are working to close racial and gender disparities in business ownership.

Strong postsecondary institutions and training programs exist throughout the metro

The St. Louis metro benefits from a strong network of universities and colleges that offer two-year and four-year degrees in high-demand, high-value fields. In addition, the metro is home to nationally recognized skills providers such as LaunchCode and Claim Academy, which are able to equip workers with specific technological expertise in a relatively short period of time.



Advancing racial equity and social justice is a key concern in the metro

Since the fatal shooting of Michael Brown by a Ferguson police officer in August 2014, the St. Louis metro has experienced an exceptional rise in civic engagement and collective action to address persistent racial disparities in policing, education, health, wealth and a whole host of other areas. This deliberate attention to racial equity extends to economy-shaping as well. To take just one example, a coalition of universities, medical institutions, and major corporations are using their purchasing power to strengthen metro-area Black-, Brown- and/or women-owned businesses. The desire to build a healthy metro economy has fused with a commitment to shared prosperity and a determination to act.

Past successes affirm the metro’s potential

Though economic growth was slow to rebound after the Great Recession, the St. Louis metro has seen a number of important achievements in recent years. The National Geospatial-Intelligence Agency’s plans for the Next NGA West facility in North St. Louis and recent federal grants for new centers of excellence in pandemic resilience and defense medicine represent major wins for the entire metro. Square’s acquisition and remodel of the old St. Louis Post-Dispatch building will provide an anchor for an emerging fintech innovation district in downtown St. Louis. Startup activity is on the rise, with hubs like OPO Startups in St. Charles serving as critical nodes in an expanding entrepreneurial ecosystem. The region is also home to the largest Black-owned business in the country, World Wide Technology, which has grown from a five-person startup to a global firm with annual revenues of \$12 billion over the past three decades. Continued growth at Scott Air Force Base in St. Clair County reflects its position as logistical command and control for the entire U.S. military. And Cortex, 39 North and the Danforth Plant Science Center are known as leading centers for bioscience research and technology.

Arts and culture have pride of place in Metro St. Louis

The St. Louis metro has a wide range of cultural amenities that bolster the area economy while enhancing quality of life for residents and visitors alike. As is true in other parts of the U.S., these assets tend to concentrate in and around the urban core. In the Grand Center Arts District, theaters, museums and galleries abound. Nearby Forest Park is larger than New York City’s Central Park and features a world-renowned zoo, museums, the St. Louis Science Center, musical theater venue The Muny and more amidst over 1,300 acres of greenspace and trails. Cultural institutions like the Vaughn Cultural Center, the St. Louis Black Rep, the Griot Museum of Black History, the Scott Joplin House State Historic Site and the National Blues Museum celebrate the rich cultural contributions of Black artists past and present. The city is also home to two Major League sports teams—the Cardinals (baseball) and the Blues (hockey)—and St. Louis CITY SC, a Major League Soccer team, is set to debut in 2023. Arts, culture and recreation extend beyond the urban core and include Cahokia Mounds, Grove Memorial Park and Pere Marquette State Park in Metro East as well as the 128-mile Great Rivers Greenway network and Babler, Castlewood and Katy Trail State Parks on the Missouri side of the metro.

5 ACTIONABLE STRATEGIES

By 2030, the St. Louis metro can take the lead in inclusive economic growth. These five strategies explain how. By working together and taking action on the suite of activities detailed below, the metro can fulfill its potential and secure the benefits of inclusive growth for all.

Achieving inclusive growth will require a collaborative ethos and a bias for action. Only cross-sector collaboration and deliberately inclusive approaches will suffice. The metro will need to adopt new ways of working that reject silos and fragmentation in favor of holistic perspectives and ecosystem-building.

Healthy stakeholder ecosystems value cooperation. These living networks appreciate complexity and understand that the challenges we face are interconnected. They also recognize that a healthy economy must be environmentally sustainable.

Many of the strategies below have implications for combatting the climate crisis. Greater density in the core can lead to shorter commutes and more

public transit use, which in turn lowers carbon emissions. Investments in land reclamation create green space and eliminate the environmental risks posed by vacant properties. Innovation in bioscience, geospatial and other sectors inspires new products, companies and industries that produce environmentally sustainable outcomes.

Inclusion and equity are impossible without intentional, ongoing work on the part of all stakeholders. We believe that truly inclusive growth requires attention to diversity, equity and inclusion across every facet of the economy. The STL 2030 Jobs Plan does not include a strategy focused exclusively on diversity, equity and inclusion because we believe that these critical concerns should not be siloed from the rest of the work. To secure inclusive growth, every strategy must advance diversity, equity and inclusion.



STEWARDSHIP AN INCLUSIVE ECONOMY

In successful metros, civic and business leaders band together to steer and steward the economy, using clear metrics to set targets, gauge progress and nimbly adjust to market disruptions and opportunities that arise. Drawing on best practices from such places, the St. Louis metro will devise a new approach to economic stewardship that prioritizes collaboration, coordination and inclusive growth.

ACTION

Organize for inclusive growth with leadership and stewardship from Greater St. Louis, Inc.

Greater St. Louis, Inc., a business-led intermediary, will organize industry councils and work closely with other key stakeholders in the broader business community to catalyze inclusive growth and create opportunities for co-creation, trust-building, and shared implementation within and beyond the business community. This new organization will have principal responsibility for driving metro-wide action on the STL 2030 Jobs Plan. It will oversee the STL Pledge, manage the STL Capacity to Act Initiative and incubate Supply STL and the Talent Surge, spinning them out as they are mature.

ACTION

Organize and leverage regional anchors and other employers through the STL Pledge

The STL Pledge will commit employers to buying local, hiring local, investing local and/or locating

a portion of new jobs created near key nodes and districts in the city's core. By maximizing their impact on the metro economy, anchors and other organizations will create stronger, healthier, more vibrant communities in Metro St. Louis. Their engagement through these multiple channels will create a larger, more diverse and better skilled workforce, better places where employees can work and a more flexible and reliable local supply chain.

ACTION

Organize a STL Capacity to Act Initiative to support critical elements of the STL 2030 Jobs Plan

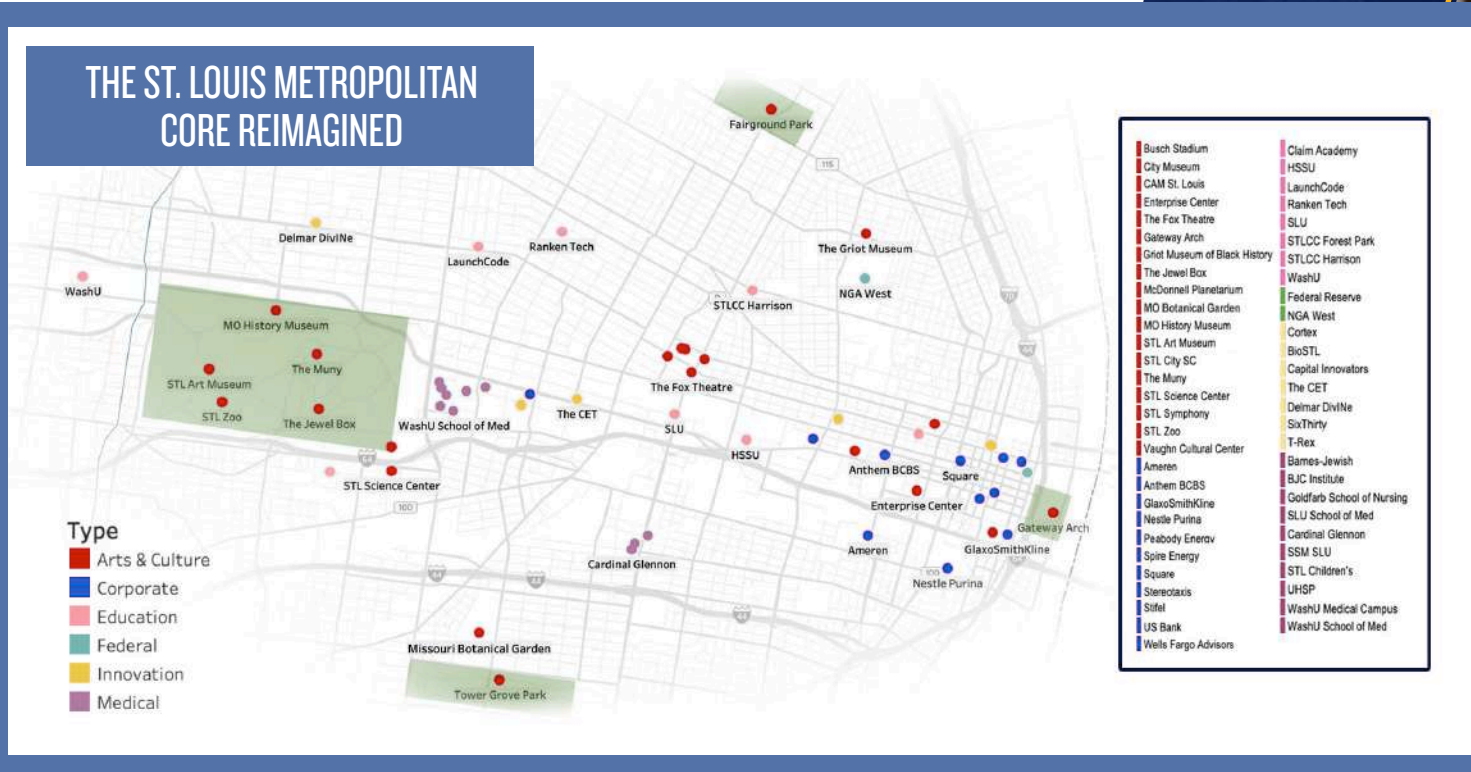
A new STL Capacity to Act Initiative will locate patient and market-oriented capital to support implementation of the STL 2030 Jobs Plan. It will act as a connector, not an aggregator, of capital, working with foundations, family offices, major corporations, the public sector and other potential funders to identify resources and investments with the greatest potential benefit for area residents.

RESTORE THE CORE AS THE VIBRANT JOBS AND CULTURAL CENTER OF THE METRO

Metro-wide inclusive growth won't happen without a strong urban core. This strategy is meant to shock the market back to life by boosting employment density and rejuvenation in the urban core. A good portion of the jobs created must be accessible to those living in historically disadvantaged neighborhoods in North St. Louis, north St. Louis County and East Saint Louis.

Any effort to Restore the Core must build on the recently adopted Design Downtown STL plan, which affirms the outsized role that central business districts can play in the metro economy. The plan envisions downtown St. Louis as a vibrant and diverse walkable community and offers concrete plans for achieving that vision. It calls for an expansion of entrepreneurship, construction of affordable housing and investment in public transit infrastructure, greenspace and cultural amenities.

The Restore the Core strategy calls for a reevaluation and a reimagining of the heart of the City of St. Louis. The city has both historic and new economic assets north of the "Delmar Divide," including Ranken Technical College, Next NGA West, Delmar Divine, and Fairground Park. This new map (below) recognizes the diversity and density of assets within the metro's urban core.



ACTION

Finish the Brickline Greenway

The Brickline Greenway proposes up to 20 miles of greenway connections through 17 neighborhoods in the core of the city, connecting to four major parks and hundreds of places along the way. This distinctive civic investment will work with partners and neighbors to make sure the greenway is an asset for surrounding communities and the region at large. Deliberate efforts to keep generated wealth in the community will ensure that value created by the Greenway is used to meet the needs and priorities of local residents.

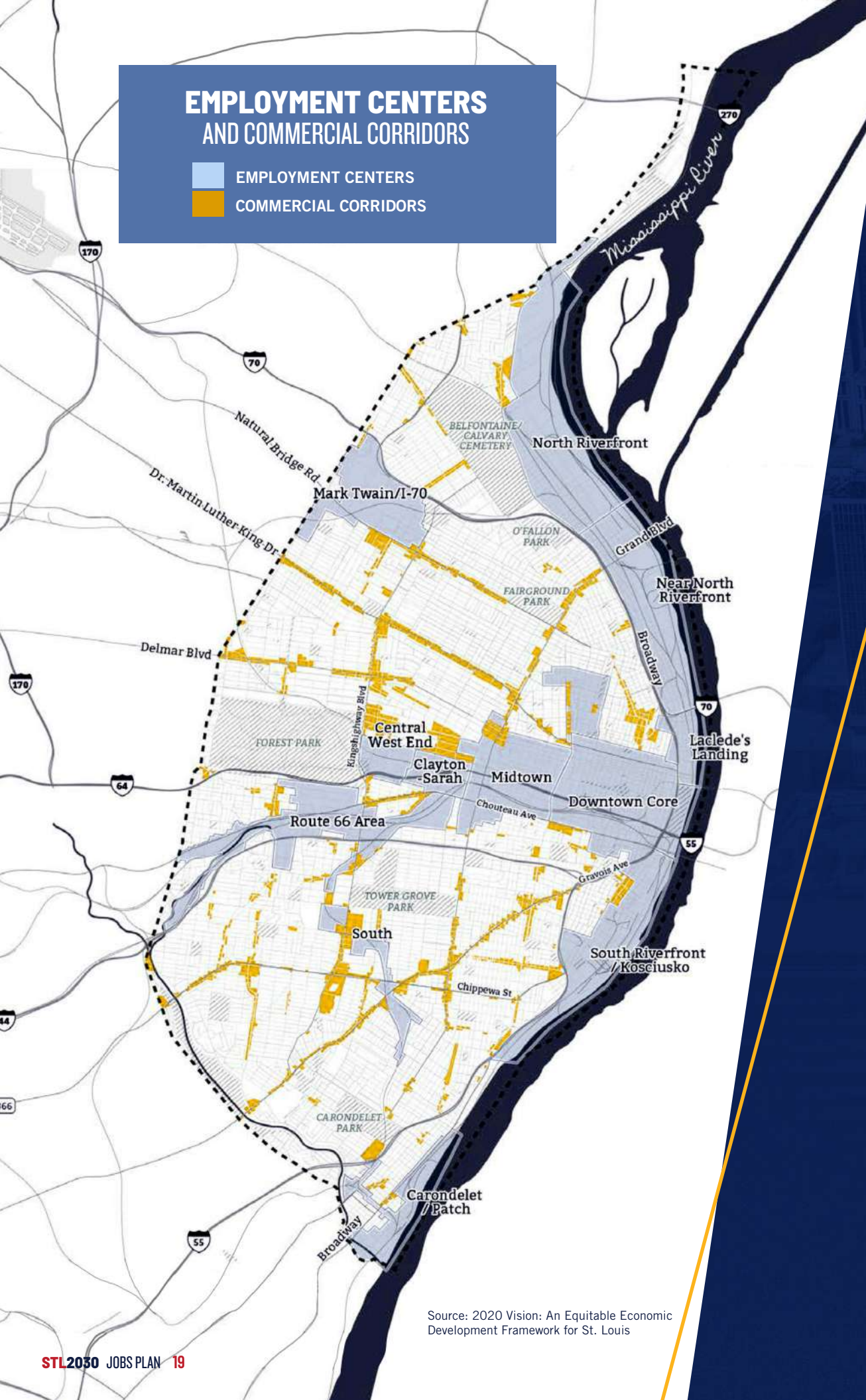
ACTION

Launch a Neighborhood Transformation Initiative to regenerate historically disinvested Black neighborhoods in the City of St. Louis

Revitalized street corners and commercial corridors create jobs and provide opportunities for local wealth-building. Locally owned storefronts also help crowd out unscrupulous businesses that prey on low-income residents. There is much work to do to revitalize Downtown St. Louis and disinvested Black neighborhoods nearby. Greater St. Louis, Inc. will play a role in stewarding the Design Downtown STL plan to revitalize the metro's central business district. In other areas, neighborhood-based organizations will drive the work. Greater STL, Inc. can convene, amplify and improve connections to resources for these efforts.

EMPLOYMENT CENTERS AND COMMERCIAL CORRIDORS

- EMPLOYMENT CENTERS
- COMMERCIAL CORRIDORS



Source: 2020 Vision: An Equitable Economic Development Framework for St. Louis

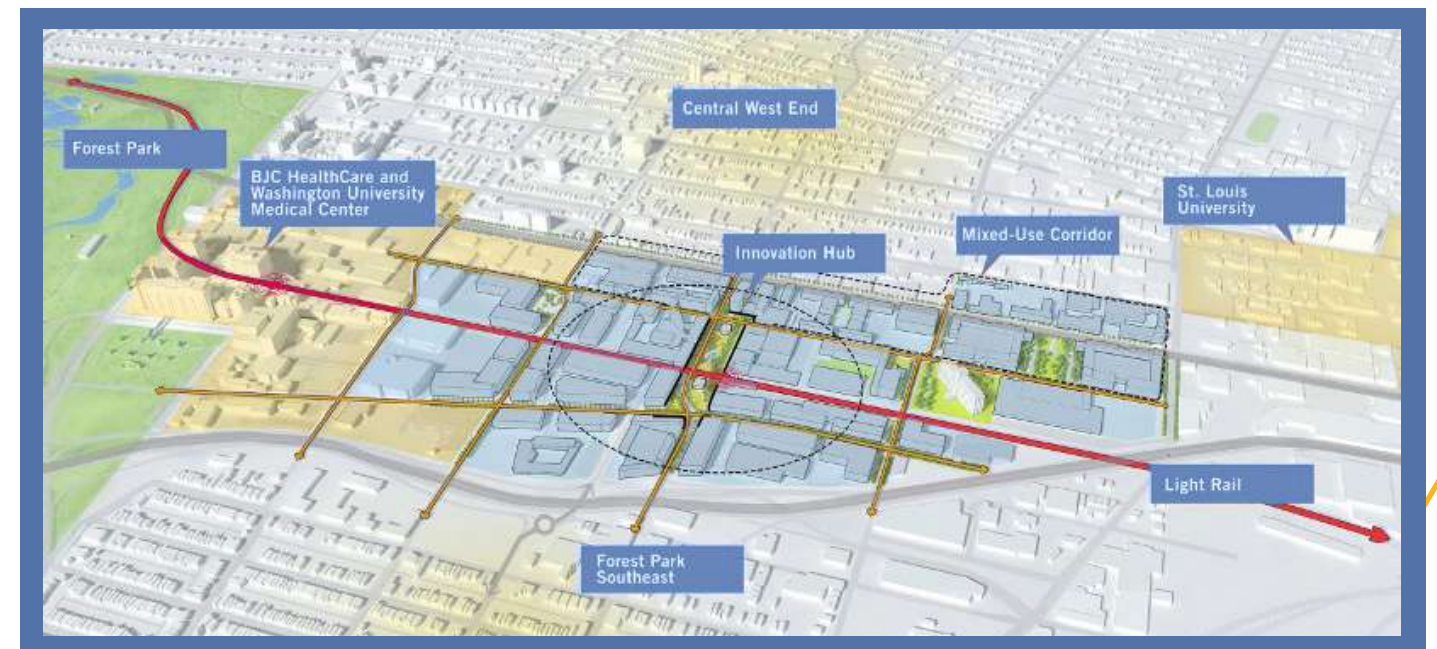


Photos courtesy of Cortex Innovation Community

ACTION

Invest in existing and emergent Innovation Districts to drive inclusive growth

Metro St. Louis is a global leader in the creation and stewardship of innovation districts. From the Cortex Innovation Community and T-REX in downtown St. Louis to OPO Startups in St. Charles and 39 North in Creve Coeur, these compact, innovation-intensive areas offer possibilities for progress on a wide range of issues, including urban regeneration, company formation, commercialization of research, talent preparation and community engagement. Action to strengthen these districts will include an attraction strategy that encourages a diverse set of talented workers to move to the metro, where they can benefit from access to extraordinary amenities and contribute to an inclusive urban turnaround and an inclusion strategy to help companies in these districts hire and retain workers from the core.



THE CORTEX INNOVATION COMMUNITY

BUILD A WORLD-CLASS ECOSYSTEM FOR SMALL BUSINESSES & ENTREPRENEURS



To grow community wealth, the St. Louis metro must ensure that all small business owners—regardless of race or gender—have ready access to reliable customers, quality capital, experienced advisors, an expanding network of investors and vibrant Main Streets and commercial corridors. The bold ambition: Put St. Louis among the top metros for Black-, Brown- and/or woman-owned small businesses and startup activity.

ACTION
Embark on an Entrepreneurial Surge to increase the number and strength of locally owned businesses

Main Street businesses that serve local consumers and anchors, startups that deploy advanced technologies, new ventures that commercialize research emerging from universities and institutes—though these enterprises seem radically different, they are in fact *all limbs of the same tree*. The Entrepreneurial Surge will embrace this more expansive vision of what counts as a startup and provide support across the continuum of companies.

Substantial time, attention and resources will be dedicated to growing the number and size of local Black-, Brown- and/or woman-owned businesses in high-wage sectors of the economy. Supporting diversity in tech entrepreneurship must be a priority. The Supply STL initiative, the Small Business Support Collaborative, and the Main Street STL effort (all described below) will contribute directly to these aims.

ACTION
Establish a Supply STL initiative to leverage the inclusive growth potential of anchor institutions in the St. Louis metro

Supply STL will put the STL Pledge into action by organizing metro-area anchors to use their purchasing power to drive growth and job creation in local small businesses, with

particular emphasis on Black-, Brown- and/or woman-owned firms. The initiative will also work to scale the capacity of these vendors through efforts such as the Small Business Support Collaborative.

SUPPLY STL IS THE STL PLEDGE IN ACTION

Anchor corporations and institutions have long been recognized as potential catalysts for economy-shaping efforts. Supply STL builds on this insight by channeling the local purchasing power of large companies, universities, hospitals, utilities and government agencies for the purpose of growing locally owned small businesses and advancing supplier diversity in the St. Louis metro.

This initiative will attend to both the demand side of the equation—understanding what goods and services anchor institutions (and other organizations) purchase—and the supply side—understanding which local vendors can help meet those needs (or could do so with adequate support and capital).

Building on foundational work led by UMSL, a newly created Supply STL intermediary housed in Greater St. Louis, Inc. will champion this effort. The intermediary will educate anchors on the economy-shaping power of their procurement spend and work with them to increase the number and size of their purchasing contracts with local small businesses. It will also work with local Black-, Brown- and/or woman-owned vendors to expand their capacity as demand grows.

By putting the STL Pledge into action, Supply STL will set a new standard for comprehensive supplier diversity efforts focused on the unique circumstances of the communities served.

ACTION
Build a Small Business Support Collaborative to support the formation and expansion of Black-, Brown- and/or woman-owned small businesses

The Small Business Support Collaborative (SBSC) will provide a range of resources—affordable back-office services, technical assistance on procurement contracts, access to capital, finance fundamentals and culturally competent business services and capital providers—to Black, Brown, and/or women founders at scale. The SBSC will be a crucial support for Supply STL vendors as they grow their businesses. These resources will be coordinated by a new center of excellence, possibly at Harris-Stowe State University, that will bring rigor, discipline and national attention to the issue of Black entrepreneurship and business success.

ACTION
Launch a Main Street STL effort to accelerate the revival of neighborhood business districts throughout the metro area

The pandemic-induced collapse of small businesses has had a devastating effect on Main Streets and neighborhood business districts throughout the metro. A Main Street STL effort will accelerate the comeback of neighborhood business districts throughout the metro by connecting small businesses to quality capital, real estate opportunities, technical assistance and other supports. This initiative will reinforce the STL Pledge, Supply STL, and the SBSC by making metro Main Streets more hospitable for locally owned small businesses. It will also reinforce Main Street efforts already underway in St. Charles and Washington, MO, Alton, IL and elsewhere in the metro.

BECOME A TALENT ENGINE AND MAGNET

Skills shortages and limited opportunity in the St. Louis metro will only intensify without deliberate efforts to establish clear, well-supported pathways into quality jobs that pay a livable income. Coordinated collaboration between industry and education and training providers will increase residents' awareness of career options, develop effective work-based training programs and place program graduates into open positions in the metro area.

Each person's career possibilities are directly affected by their P-12 academic preparation. At present, however, some underperforming schools in the metro limit students' options before they ever finish high school. Given the direct link between P-12 education and postsecondary success, a complementary effort will be needed to ensure that every student in the metro graduates high school with academic proficiency and a clear plan for what's next.

ACTION
Build Industry-Led Workforce Collaboratives that connect education and training to employers' needs

Over the next ten years, Metro St. Louis will need to develop a constellation of industry-led workforce collaboratives throughout the metro. These groups will draw together stakeholders from the private sector, P-12 and postsecondary education, workforce training, support services and community organizations to align education

and training with employer demand. Guided by firsthand knowledge from industry leaders, workforce collaboratives can ensure better communication, coordination and transparency across the education and training ecosystem.

These collaboratives will attend to the entire talent development spectrum, raising career awareness in P-12, connecting residents to supported career pathways and helping incumbent workers acquire the skills they need to advance in their careers. They will also take deliberate action to increase the training, hiring and retention of workers from historically underrepresented groups, with particular attention to disinvested communities in North St. Louis, North St. Louis County and East St. Louis.

ACTION
Jumpstart industry-led workforce development with a Talent Surge

Throughout the metro, employers and educators are already collaborating on programs that put people on pathways into high-demand fields. This initiative to expand the reach of these proven solutions will provide a short-term surge of skilled workers in priority sectors such as advanced manufacturing, agtech, biotech, healthcare and software development and engineering. Competitive grants from a well-resourced Talent Surge Fund can bring these programs to scale and lay the groundwork for future collaborations.

Workers' success will increase employers' return on investment and create new possibilities for all workers. Barriers such as limited career awareness and guidance, financial challenges, unreliable transportation and family care responsibilities should not prevent residents from completing (or even enrolling in) training programs that lead to quality jobs.

ACTION
Strengthen STEM education and training throughout the St. Louis metro

Given that many high-demand occupations in the metro require skills in science, technology, engineering and math (STEM), STEM education—or STEAM education, if arts are included—must be a top priority. A coordinated and collaborative regional STEM education and training ecosystem will help ensure that every student in the metro has access to high-quality STEM learning opportunities and career awareness activities throughout P-12 and beyond. Local intermediary STEMSTL will cultivate this ecosystem by working with stakeholders to align the many disparate efforts in the metro, with a particular focus on those schools and students with the least access to quality STEM learning. Meanwhile, expansion of the successful two-year lab-tech training program at St. Louis Community College (STLCC) and the launch of a new summer STEM program for college students of color will boost STEM workforce development by putting more St. Louisans on pathways to careers in bioscience.



MAKE THE ST. LOUIS METRO A HUB FOR NEXT-GENERATION INDUSTRIES AND TECHNOLOGIES

To remain competitive in the 21st-century economy, the St. Louis metro will need to invest in healthy and resilient industry cluster ecosystems. Innovation-intensive industries—sectors like bioscience that invest in R&D and deliver more productivity, exports and pay—offer the greatest benefit to metro economies. With high-value economic activity and a wage premium that extends to technical and non-technical roles alike, these industries have the best potential for sustainable and inclusive economic growth. As a business-led intermediary, Greater St. Louis, Inc. has a vital role to play in organizing industry councils and fostering engagement across all target industry sectors. Such efforts would leverage Greater STL, Inc.'s core capability in generating and securing new business investment for the metro. Other specific actions are detailed below.

ACTION

Quadruple down on bioscience in order to supercharge this established industry cluster

Bioscience stands at the doorstep of a new stage of growth. With a solid foundation in place, the metro needs to quadruple down on bioscience and expand the metro's contributions to the purpose-driven economy.

Taking Bioscience to the Next Level

Deliberate and sustained investment in the Metro St. Louis bioscience sector has produced a dense and highly successful cluster ecosystem. The targeted investments listed below will position this strong and vibrant sector for an even greater role in the purpose-driven economy.

- **BioGenerator:** What began as an effort to increase access to seed-stage capital has evolved into a multifaceted program to help entrepreneurs start and grow their businesses. Adding capacity to this proven intermediary will expand entrepreneurs' access to the knowledge and capital they need to get their ventures off the ground.
- **GlobalSTL:** This homegrown recruitment program plays a vital role in bringing innovative bioscience companies to Metro St. Louis. The potential for GlobalSTL and AllianceSTL to work collaboratively gives the metro a powerful platform for strengthening its advanced industries.
- Expanding its capacity at home and abroad will enhance the impact of this proven program for innovation-oriented economic development.
- **Corporate recruitment strategy:** A coordinated and proactive bioscience recruitment strategy will increase the region's competitiveness in site selection efforts, resulting in more proposals accepted by site selectors and more companies deciding to locate in the region.
- **Early-stage space:** Access to the right space at the right time for the right price can have a major effect on a company's ability to grow. Increasing the stock of affordable lab/office space, particularly in innovation districts and near anchor institutions, will create new options for growing startups, co-working efforts and regional workforce training.
- **Core facilities:** Shared core facilities for bioscience research have helped drive growth in the sector over the past decade. These facilities accelerate commercialization of innovation, help startups grow, and attract companies to the region. Expanding existing core facilities to include additional capacity and capabilities will further this progress and make the region even more attractive to bioscience firms outside the region.
- **Centers of excellence:** The St. Louis metro is home to a unique convergence of innovation strengths needed to address 21st-century global challenges such as feeding a growing global population with fewer resources, addressing health disparities in rural and urban areas, developing new renewable energy sources and responding to global health crises. New Centers of Excellence that build on these strengths will secure the region's global reputation and spark economic activity for years to come.
- **STEM education and training:** Basic competency in STEM subjects is a must-have for our increasingly tech-powered world. A coordinated and collaborative STEM education and workforce training ecosystem, stewarded by BioSTL's STEMSTL, will align the many disparate efforts in the region, with a particular focus on those schools and students with minimal access to STEM education. Meanwhile, expansion of STLCC's successful lab-tech training program and a new summer STEM program for college students of color will put more people on pathways into bioscience careers.

ACTION

Implement the GeoFutures Strategic Roadmap and build a National Center for Location Sciences (NCLS) near Next NGA West

NGA's decision to remain in the City of St. Louis catalyzed new energy around the metro's geospatial cluster. Implementation of the 2020 GeoFutures Strategic Roadmap will position the metro for future growth that is both innovative and equitable. The GeoFutures plan envisions a growing geospatial sector grounded in the metro's distinctive strengths in national security, transportation and logistics, agtech and health care service delivery. It imagines a new geospatial innovation district developing in the blocks surrounding Next NGA West, replacing vacant lots and abandoned buildings with new state-of-the-art facilities and bringing broadly shared prosperity and new work opportunities to neighborhood residents. A new National Center for Location Sciences (NCLS) near Next NGA West would further enhance this emerging innovation district. With core facilities that are accessible to early-stage firms, NCLS would provide a supportive environment for applied R&D and commercialization of innovation. It would bring new growth, investment and innovation to surrounding neighborhoods, with community partnerships and value-capture mechanisms put in place to keep generated wealth in the community.

ACTION

Construct an Advanced Manufacturing Innovation Center (AMIC) to drive innovation and support area manufacturers

Construction of AMIC would increase the region's capacity for innovation in advanced production. This globally significant facility would house cutting-edge R&D and intentionally inclusive accelerated training programs that provide pathways into careers that pay well. It would be designed with the needs of small and medium-sized enterprises (SMEs) in mind so that these vital supply-chain links can access the latest research and technology.

ACTION

Invest in multimodal freight infrastructure to strengthen the metro's advantage in manufacturing and transportation and logistics

In addition to its strengths in advanced production, the St. Louis metro sits in the center of the country, halfway to virtually anywhere in the continental United States. Its multimodal assets allow freight to move easily, whether by barge, railcar, airplane or semi truck. Investment in the construction and maintenance of freight infrastructure investments—including improvements to I-70 and I-64, replacement of the Merchants Memorial Mississippi Rail Bridge and additional cargo capacity at St. Louis-Lambert International Airport—will make it easier for St. Louis manufacturers to obtain needed materials and send finished products to domestic and global markets.

ACTION

Expand transit and digital access to better connect St. Louisans to opportunities no matter where they live

Insufficient public transportation infrastructure isolates historically disinvested neighborhoods, limiting access to education, training and employment opportunities in other parts of the metro. Investment in public transportation solutions like bus rapid transit (BRT) would better connect the entire metro and improve quality of life for households without access to a car.

Lack of digital access has a similarly isolating effect that has grown only more pronounced with the COVID-19 pandemic. In both urban and rural communities, high-speed internet service remains out of reach for too many households. Regional investment in the expansion and modernization of broadband networks as well as residents' acquisition of basic digital skills would drive adoption and decrease the number of households in the bi-state metro struggling with insufficient internet service.


CONCLUSION

At the start of this plan, we made an ambitious claim: The next decade presents an exceptional opportunity for Metro St. Louis.

That assertion may seem overly optimistic to some, but the 15-county metro is a globally significant metropolis rich in assets and competitive advantages. It has the ability, capacity and capital to set a new standard for inclusive growth rooted in shared civic purpose and radical collaboration. By taking the actions outlined here, the metro can embark on its most prosperous decade in the past century.

Disruptive periods enable communities that are organized and focused to leap frog ahead of others. This is one of those periods—and the St. Louis metro is one of those places.

The region can do grand things, together.



New Localism Associates is a firm focused on helping cities and metropolitan areas design, finance and deliver inclusive growth. The firm draws on the expertise of a broad network of practitioners in the United States and beyond. The STL 2030 Jobs Plan work was guided by Bruce Katz, Jessica A. Lee, Courtney Kishbaugh and Ben Preis.

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