REPORT

PHILADELPHIA'S NEXT CHALLENGE: FROM URBAN REVITALIZATION TO INCLUSIVE PROSPERITY

Richard Florida

creative class group

INTRODUCTION

Philadelphia's transformation over past two or three decades has been nothing short of remarkable. I've seen it with my own eyes, over the arc of my career as an urbanist. Philadelphia has long been one of my favorite cities. Having grown up in New Jersey and having gone to college at Rutgers, I've been visiting and tracking the city since the mid-1970s. I saw it in perhaps its most hard-pressed days and cheered on the stunning revival of its downtown area over the past decade or so. I've been visiting even more now, as a result of this inaugural Philadelphia Fellowship, sponsored by Drexel University, Thomas Jefferson University, and the University City Science Center, where I have been working with local stakeholders and academics to benchmark where the city stands on key metrics and to develop strategies for more-inclusive development for the future.

I first came to know the city during the dark days of its original urban crisis in the late 1960s and 1970s, when industry, commerce, headquarters, talent, and the middle class moved to the suburbs; the city's economy and tax base hollowed out; and unemployment, economic disadvantage, concentrated poverty, and the attendant social problems of crime and violence surged.

Later, in in the 1990s and early 2000s, from my vantage point as a Pennsylvania resident, Carnegie Mellon professor, and member of the board of directors of Team Pennsylvania, I observed Philadelphia even more closely as the city began its economic comeback and urban revitalization. I tracked the growth and increasingly urban inclination of the city's creative class and wrote about leading-edge initiatives—like Campus Philly's efforts to retain college graduates and attract young talent to the city and those of the city's anchor institutions, including its world-renowned hospitals and universities, to revitalize much of West Philadelphia—in my 2002 book *The Rise of the Creative Class*.[1] I watched as young people, the creative class, and business came pouring back into the city. I watched as Center City and the surrounding neighborhoods became veritable beacons of urban revival filled with exceptional restaurants, hotels, arts and cultural amenities, and a 24-7 buzz.

I watched intently as the city's urban revitalization took off, first gradually and then at an accelerated pace, during the first two decades of the new millennium, as ripples of revitalization moved outward to neighborhoods like Fishtown, Northern Liberties, and University City. In the years spanning 2006 to 2012, Philadelphia had the greatest proportional increase in millennials of any major city, with the population of 20-to-34-year-olds increasing by about 100,000 young residents.[2] The region's world-class colleges and universities are huge magnets for talented young people: all told, the metro is home to more than 340,000 college students, making it the nation's fifth-largest college town.[3]

The city has also attracted creatives from across the country. The region's creative class of nearly a million people is the ninth-largest in the nation.[4] A decade or so ago, few would have mentioned Philadelphia as one of the nation's and world's leading entrepreneurial ecosystems. But today, the region ranks among the top dozen in the U.S. and the top 25 in the world for venture capital startup companies, hauling in nearly a billion dollars a year in venture capital investment, similar to Washington, D.C., Tel Aviv, Berlin, and Toronto.[5] The city's revitalization received powerful outside validation when Amazon selected Philadelphia as one of 20 finalists for its much ballyhooed second headquarters, or HQ2.

To me, Philadelphia's urban revival seemed different, and *was* different, than those of leading superstar cities like New York, San Francisco, Boston, and Seattle. My take was that Philadelphia was one of a set of cities pioneering a more-affordable and perhaps more-authentic alternative to what was happening in expensive superstar cities and leading tech hubs.

About a year or so ago, at the inception of my Philadelphia Fellowship, I retired to one of Philly's great restaurant spots, Vernick Food and Drink near Rittenhouse Square, to get some dinner and a glass of wine after a long day of work and meetings. Sitting at the bar by myself, I noticed that I was surrounded by much younger patrons than I typically see when I am out at night in New York, Los Angeles, or Toronto. When the bartender came to take my order, I wanted to ask him why. One thing I've learned in more than three decades of studying urban development: there's no better way to take the pulse of a city than to ask a bartender, waitstaff, cabbie, or ride-share driver. "This is amazing," I said, "there are so many more young people here than I see when I'm out with my wife in New York City." He replied in the oh-so-cool bartender way: "Bro, that's easy. It's affordable—you can still actually afford to live here."

It was just this affordability which enabled Philadelphia to be both creative and authentic, helping to make the city a mecca for young people and the creative class of technologists, innovators, professionals, managers, artists, and designers, many of whom were fleeing New York and other expensive cities. It also enabled service workers to live close to their jobs in the urban core and access the many economic and quality-of-life benefits of being in the city.

Perhaps it *was* affordable, but it is getting less and less so every day. Housing costs are increasing across the region, especially in the popular central city neighborhoods that talented young creatives have flocked to. While the median list price for the Philadelphia metro remains a fairly reasonable $187,000, according to Trulia, a quick look at the map of real estate prices in the areas surrounding Vernick, in zip code 19103, reveals rates many times higher than that. In the blocks just across Walnut Street, median list prices are nearly $600,000, and closer to Rittenhouse Square, the median is well over $700,000. I saw several places listing well into seven figures. It's not New York or San Francisco prices *yet*. But it's getting there.[6]

Now, I am watching even more closely as the city's urban revival seems to have reached a tipping point. Philadelphia appears to be on the edge of what I have dubbed the new urban crisis.[7] If the city's old urban crisis of the 1970s and 1980s was one of economic decline and dysfunction, its new urban crisis is a crisis of success, manifested in accelerated gentrification, rising housing costs, and growing inequality and social division. Philadelphia's new urban crisis is not as extreme as that of New York or San Francisco or L.A.—*not yet*. But the city ranks 21st among the 50 largest American cities on my New Urban Crisis Index, a composite measure of inequality, economic segregation, and housing unaffordability.

More disturbingly, I have observed Philadelphia as it has divided into two separate and distinct cities. One is a city of advantage and opportunity—a beacon for the highly educated creative class. This city is centered around the downtown core, Center City, and University City. It is home to a booming knowledge economy and revitalized neighborhoods teeming with street life and amenities. This city bears striking similarity to the upscale gentrified districts of New York and San Francisco. The other, much larger city is a place of persistent, racially concentrated poverty, with large spans of dilapidated and abandoned housing, high rates of crime and violence, and extremely limited economic opportunity. This city has more in common with the urban devastation that afflicts large parts of Newark or Detroit. Despite its urban comeback, more than a quarter of all Philadelphia households live in concentrated poverty. In some neighborhoods, as many as half of adults have not completed high school. The city suffers from a high level of income inequality among America's 50 largest cities, with a shrinking middle class and a growing gap between rich and poor.[8]

The city's divides and its new urban crisis threaten to damage—and may have already damaged—Philadelphia's much ballyhooed ability to attract the young talent that drove its revival in the first place. Since 2011, the city's ability to attract millennials has slipped to 38th among the nation's 50 largest cities. It's an early warning sign of the economic damage the city's new urban crisis might cause if left unaddressed.[9]

These issues form the motivation for my Philadelphia Fellowship. How can the city grow and prosper without pricing out longtime, low-income residents? How can Philadelphia's economic development benefit all Philadelphians? How can the city and leading anchor institutions pioneer a new, more-inclusive model of prosperity?

Over the past year, with the help of my colleague Steven Pedigo and our team, the remarkable staffs of Drexel University and its Lindy Institute for Urban Innovation, Thomas Jefferson University, and the University City Science Center, I have undertaken a detailed examination of the divided, winner-takes-all nature of Philadelphia's urban revival, its deepening socio-economic divides, and the dimensions of its new urban crisis. Over the course of this project, my team and I reviewed reams of detailed data on the city's economic transformation and socio-economic composition, mapped these and other key metrics of the city's divide, and conducted interviews and engaged in conversations with a wide cross-section of Philadelphians, including political, business, and academic leaders; researchers and experts; and neighborhood and community activists.

My big takeaway is that *Philadelphia's next challenge* is to address its divides and stop this new urban crisis in its tracks before it gets any worse. To do so will take a broad commitment to a more-widely shared prosperity for all of the city's neighborhoods and all of its people. That means expanding and broadening the work of the key leaders, stakeholders, and community groups; local government, business, labor, and civic and neighborhood groups; and, especially, its anchor institutions to craft a broad agenda for inclusive prosperity that spans affordable housing, the upgrading of low-wage and precarious service jobs, increased access to education, and more-inclusive innovation that connects all Philadelphia neighborhoods and all Philadelphia residents to its ongoing urban revitalization. This is important for both the equity and well-being of the entire city and for its long-term competitiveness and economic growth.

The following pages summarize the key findings of my inaugural Philadelphia Fellowship. This report chronicles the successes and challenges of Philadelphia's urban revival and establishes a high-level strategy for pioneering a more-inclusive economic development agenda. The result of my year-long academic fellowship is a broad strategic framework for how the city and its anchor institutions can lead in inclusive development. Hopefully, the analysis and thinking in this report can help orient the actions of local stakeholders, community leaders, and activists, many of whom I have gotten to know over the course of this fellowship and who have driven and will continue to drive positive change and transformation in the city and region.

The first part of this report summarizes the results of our detailed empirical research on Philadelphia's urban comeback, and the second part focuses on Philadelphia's growing urban divides and new urban crisis. These two sections provide detailed data and maps that compare Philadelphia's performance on key metrics of economic growth and socio-economic division to America's 50 largest cities and also break down the performance of the city's neighborhoods, defined here as census tracts. The base data are from the U.S. Census American Community Survey for the period 2011 to 2016.[10] (Appendix A provides full detail on the data, variables, and research methods used in this quantitative research.)

The third part of the report outlines a framework and agenda for inclusive prosperity—highlighting strategies for reknitting these two separate Philadelphias back into one. Our assessment builds on the ongoing work of the city, government agencies, the private sector, labor, non-profits, community and neighborhood groups, and anchor institutions to move toward more-inclusive prosperity. It is based on detailed interviews, focus groups, and conversations with representatives of these civic, political, labor, academic, business, non-profit, and neighborhood groups, as well as our quantitative research and data analysis. (Appendix B provides a full list of those who participated in interviews, focus groups, and related elements of our qualitative research.) This section focuses especially on what the city's key anchor institutions—critical drivers of change and also the organizers of this fellowship—can do to lead the city and region in embracing a more shared and inclusive prosperity.

This assessment makes it clear that there are no silver bullets or magic solutions for achieving inclusive prosperity. Bridging the gap between the two Philadelphias will require a new narrative of inclusive prosperity, an intentional strategy, and a focused effort on the part of the city's anchor institutions and its key stakeholders. Based on quantitative and qualitative assessment, we outline four key pillars that can undergird a more-inclusive prosperity for Philadelphia:

- Ensuring Affordable Housing
- Creating a More-Inclusive Innovation Economy
- Turning Low-Wage Service Jobs into Family-Sustaining Work
- Spreading Prosperity to All Areas of the City

Moving the city toward more-inclusive prosperity will not happen overnight. Just as it took the better part of a generation to ignite Philadelphia's urban comeback, creating a narrative and strategy for making the city more inclusive will similarly be a generational project. Achieving this agenda for inclusive prosperity will require a persistent, intentional, and collaborative effort by the city's anchor institutions working alongside city government, business, neighborhood organizations, labor, and other civic and community stakeholders.

My overall assessment of the city's chances of addressing its divides and achieving inclusive prosperity are optimistic. A generation ago, during my early days as an urbanist in the depths of the city's original urban crisis, neither I nor just about anyone else would have believed that Philadelphia's economy and urban core could rebound and revitalize as it has. Rebuilding that economic base and revitalizing the city's economy took a generation of hard and devoted work by local government, anchor institutions, the private sector, the real estate community, non-profit organizations, labor, community developers, and neighborhood activists. It will take a generation of similarly hard work and devotion to turn the needle toward more-inclusive prosperity. It is my hope that the work of this fellowship can help provide a broader narrative and strategic framework for spurring the city and its key stakeholders to continue that essential work.

PART I: WINNER-TAKES-ALL URBANISM AND THE DIVIDED CITY

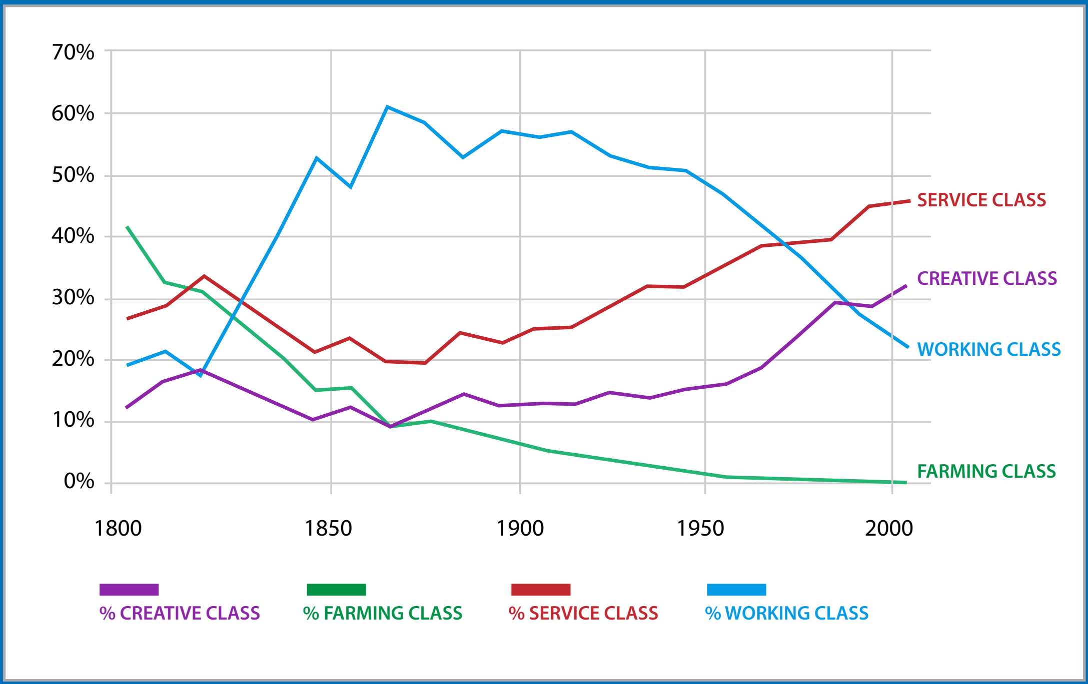
When people see a divided city, the first thing some do is start to point fingers. But Philadelphia's current dilemma is less the product of individual or government action, or inaction, and much more the result of huge structural changes in the U.S. and global economies that are affecting all cities, especially large cities.

The old urban crisis was an outgrowth of the previous economic system of Fordist mass production. Named after Henry Ford, the term Fordism captured the scientific management of the factory and the moving assembly line, which resulted in huge increases in productivity. It also referred to Ford's stipulation that factory workers should be paid more—his famous "five-dollar day"—so that they could buy the very cars their labor was producing. And, ultimately, it captured the rise of mass suburbanization, fueled by Ford's revolutionary production of cars and the higher pay of automotive and other manufacturing workers.[11]

Mass suburbanization, in turn, helped to expand the markets for cars, washing machines, refrigerators, television sets, and other industrial goods coming off those assembly lines and create the American Dream of homeownership, which reflected the aspirations of America's then-booming middle class. But suburbanization also resulted in the relocation of both that middle class and of business to the suburbs, setting into motion the original urban crisis of the 1960s and 1970s.[12]

The urban revival of the 2000s stems from a powerful shift from the older industrial economy to a new post-industrial economic system. This new economic system is no longer powered by physical labor and the manufacturing industry but by knowledge work and the creative class. In 1950, the blue-collar working class made up more than half of the workforce, while the creative class of knowledge workers, techies, artists, and cultural workers accounted for less than 20 percent, as Figure 1 shows. By the year 2000, the working class had declined to just a fifth of the workforce, and the creative class had surged to more than a third. In some cities and metro areas, the creative class has grown to as much as 50 percent of the workforce.[13]

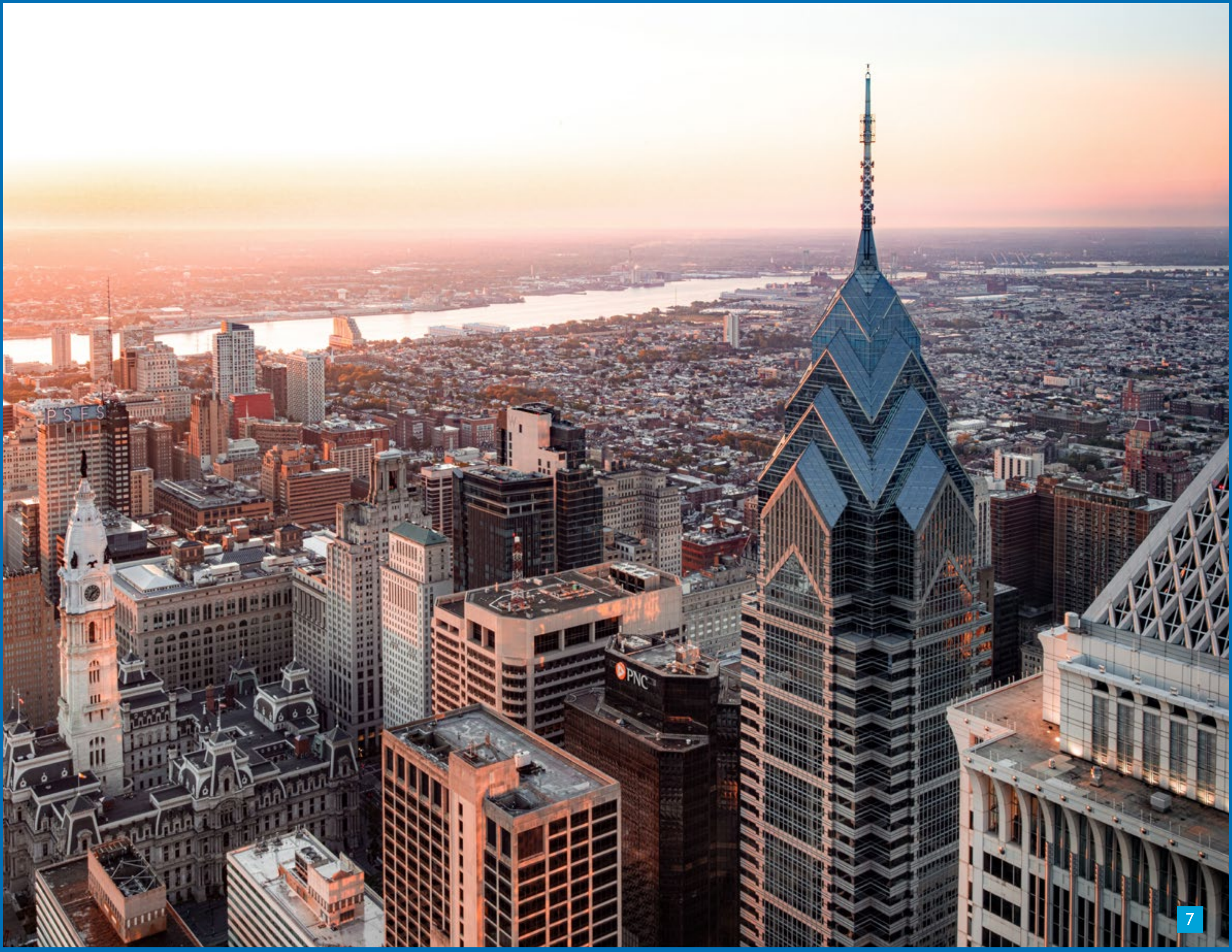
Figure 1: The Great Economic Transformation



Note: Share of workers in occupations that make up the major classes. Definitions of the major classes follow Richard Florida, *The Rise of the Creative Class*, 2002.

If the factory and large corporations provided the central organizing unit or economic platform of the old Fordist industrial economy, the city itself has become the new organizing unit of the knowledge economy. This is because the knowledge economy is powered by the dense concentration and clustering of knowledge workers and the creative class in cities, which both fuels new innovation and startup companies and increases the productivity of the economy as a whole.[14]

But—and this is a big and important but—this clustering of knowledge, ideas, and talent gives rise to a winner-takes-all geography, where a small number of cities and a small number of neighborhoods within cities gain a lion's share of the benefits. America's share of households living in middle-class neighborhoods, which was once as high as two-thirds, has fallen to less than 40 percent.[15] America has been carved into small areas of concentrated advantage—in and around major urban cores, leading universities and knowledge institutions, clusters of amenities, and transit routes—surrounded by much larger spans of concentrated disadvantage. While the highly educated, the affluent, and the advantaged have returned to neighborhoods in and around the urban core, less-educated and less-affluent people have been pushed into less-advantaged and less-connected areas of cities and suburbs. This results in massive and growing divides both among cities, suburbs, and rural areas, and within cities themselves. This is not just a Philadelphia story; it is a product of much bigger and broader global forces and a key characteristic of every other city that has experienced urban revival. Yet, to get a better handle on Philadelphia's divides and new urban crisis, it's essential to examine the specific metrics that define it.



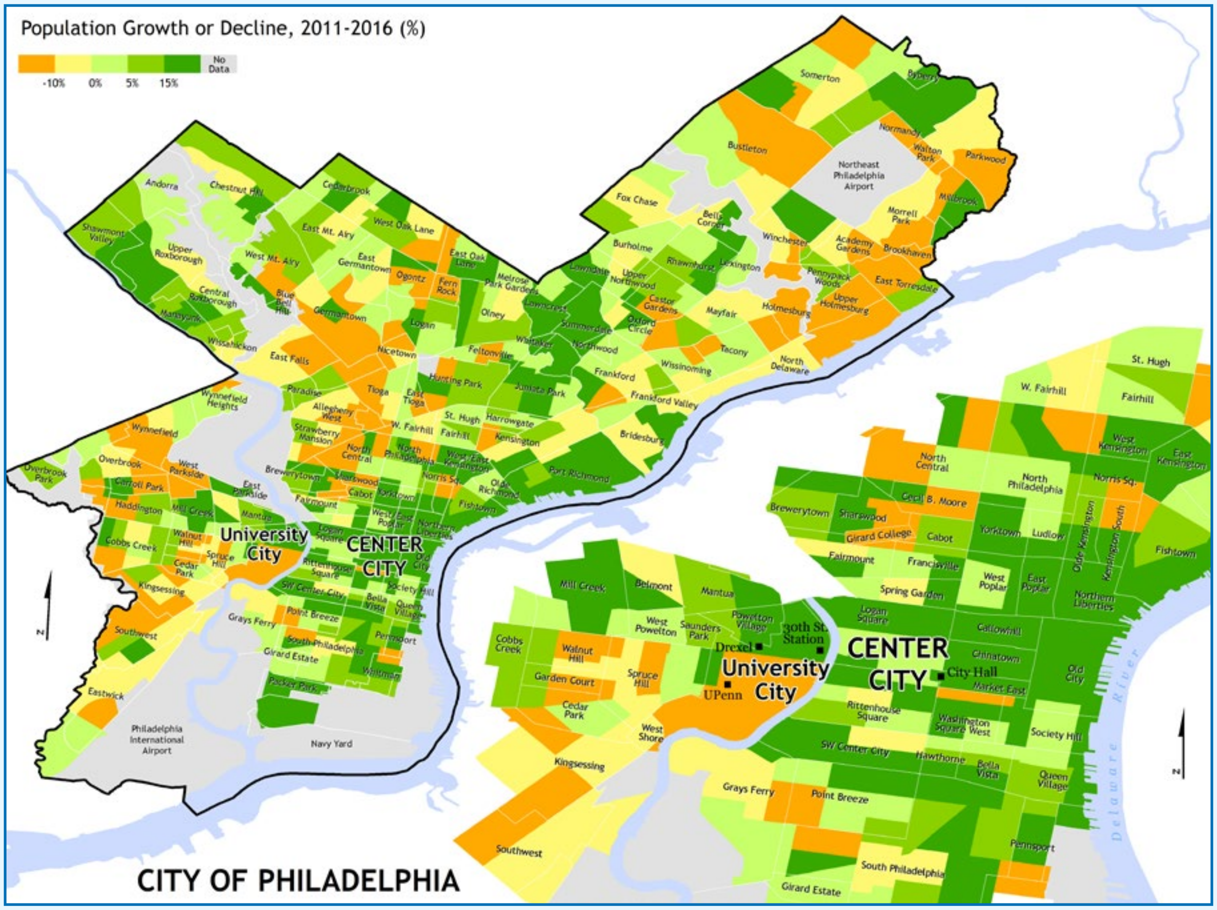
UNEVEN GROWTH

Philadelphia's incredibly uneven pattern of population growth can be seen in the map below (Figure 2). Neighborhoods, or census tracts, that gained population are highlighted in green on the map, while those that lost population are shown in orange.

With just under 1.6 million residents, Philadelphia is America's sixth-largest city. While the city's overall population grew by 3 percent between 2011 and 2016, some neighborhoods or tracts saw growth rates of greater than 10 percent, while other saw their populations stagnate or even decline.

Center City stands out as the area with the most high-growth neighborhoods, like Old City and Northern Liberties, although a number of peripheral neighborhoods in all directions also saw population growth greater than 15 percent, including Central Roxborough, Packer Park, and Summerdale. The largest swaths of population decline were concentrated in West and North Philly, broadly describing the area west of the Schuylkill River and the neighborhoods immediately north of Center City, respectively. Parts of Spruce Hill, Tioga, and West Parkside—along with a few northeast neighborhoods like Holmesburg—all lost more than 5 percent of their population in the last five years.

Figure 2: Uneven Population Growth



Note: Percent change in population, based on tract-level census data, 2011-2016

UNEVEN MILLENNIAL GROWTH

If overall population growth has been uneven, the geography of millennials has been even more so. The city's ability to attract millennials has been widely noted. Among the 30 largest American cities, from 2006 to 2012, Philadelphia saw the largest percentage increase in its millennial population, adding roughly 100,000 millennials.[16] And between 2000 and 2017, the city's population of young people ages 25-34 with a bachelor's degree increased by 68,700, according to a report by Campus Philly. Only Washington, D.C. saw a greater increase over the same period. What's more, the report found that more than half (54 percent) of the region's college students stay in the region after graduating, a higher retention rate than that of Boston.[17] This shows that initiatives like Campus Philly have helped to retain local college grads.

Table 1: Millennial Population Growth

Rank	City	5-Year Millennial Population Growth
1	San Francisco	35.8%
2	Seattle	34.0%
3	Denver	33.9%
4	Oakland	26.8%
5	Miami	24.8%
6	Portland	24.8%
7	Washington, D.C.	24.8%
8	New Orleans	23.9%
9	Austin	22.9%
10	Charlotte	20.8%
38	**Philadelphia**	**5.4%**

Note: Five-year rate of millennial population growth, based on census data, 2011-2016

But the city's millennial growth rate has slipped substantially since then, falling to just 5.4 percent between 2011 and 2016, ranking 38th among the nation's 50 largest cities, according to census data (Table 1). That's roughly one-seventh the rate of San Francisco, Seattle, and Denver, which are currently some of the most popular destination cities for young talent. At the metro level, a Brookings Institution study found that the Philadelphia area's millennial population grew by just 3.7 percent, ranking 80th among large metros. This may be a warning sign of the challenges in attracting and retaining talent that lie ahead.

A key factor in the slowdown in millennial population growth could be the city's lagging position in overall job growth. Philadelphia has seen relatively modest job growth compared to other major cities. Between 2011 and 2016, the workforce grew by 5.7 percent, ranking 32nd among major cities (Table 2). In fact, a recent study from the Pew Charitable Trusts finds that more than a third (36 percent) of those with a college degree or higher who left the region cited job opportunities as their primary reason for doing so.[18]

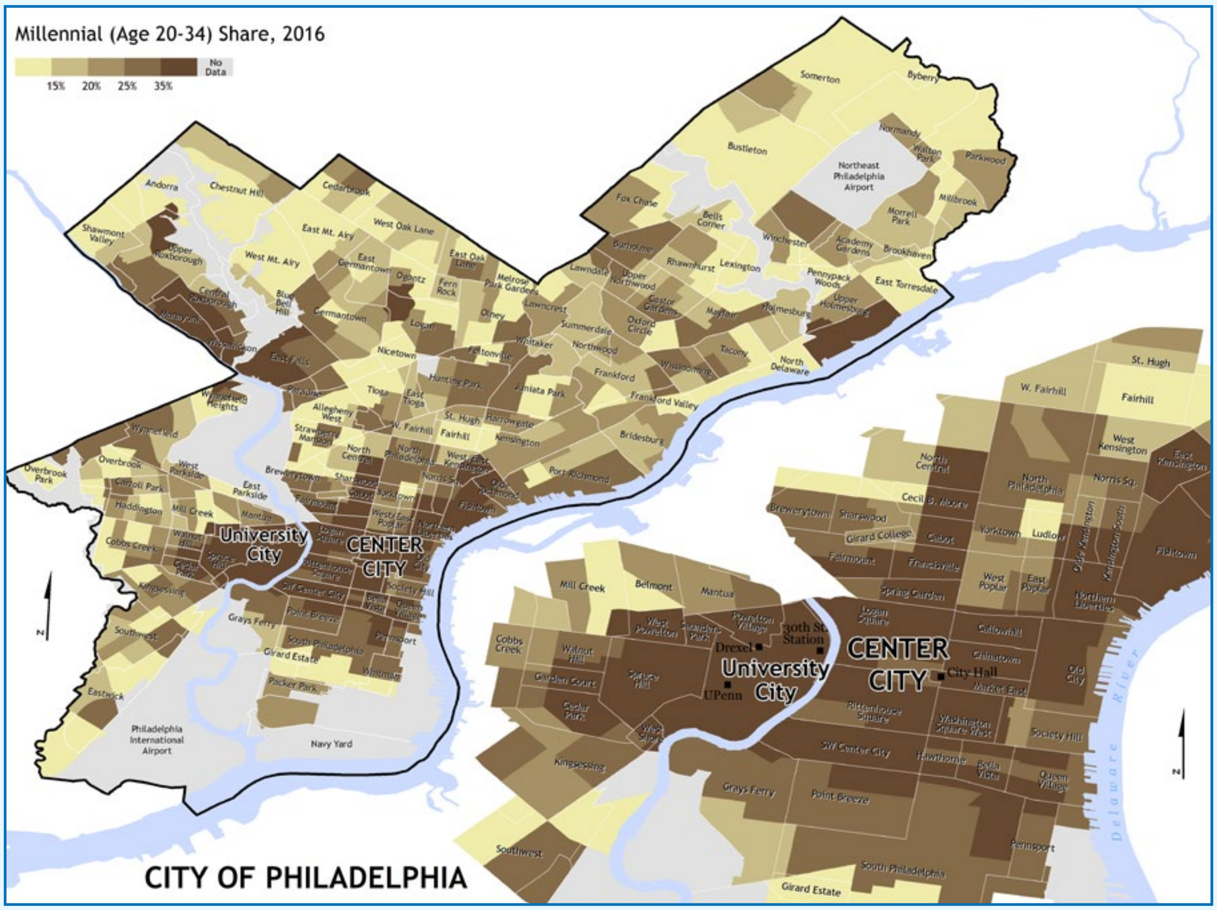
Table 2: Workforce Growth

Rank	City	5-Year Workforce Growth
1	New Orleans	21.5%
2	Austin	18.7%
3	Denver	16.6%
4	Washington, D.C.	15.7%
5	Raleigh	14.7%
6	Fort Worth	14.2%
7	Charlotte	13.8%
8	Miami	13.5%
9	Oakland	13.2%
10	Seattle	12.7%
32	**Philadelphia**	**5.7%**

Note: Five-year workforce growth, based on census data, 2011-2016

The concentration and growth of millennials has been extremely uneven across the city. Figure 3 charts the share of millennials across neighborhoods. On this map, neighborhoods with large concentrations of millennials are shown in dark brown, while those with smaller concentrations appear in lighter brown. Millennials are highly concentrated in Center City, University City, and along the Schuylkill River. Parts of Spruce Hill and Logan Square have millennial concentrations of more than 50 percent. More outlying neighborhoods like Mt. Airy West and East, Bustleton, and Byberry have millennial concentrations of less than 20 percent.

Figure 3: The Uneven Concentration of Millennials



Note: Share of millennials ages 20-34, based on tract-level census data, 2016

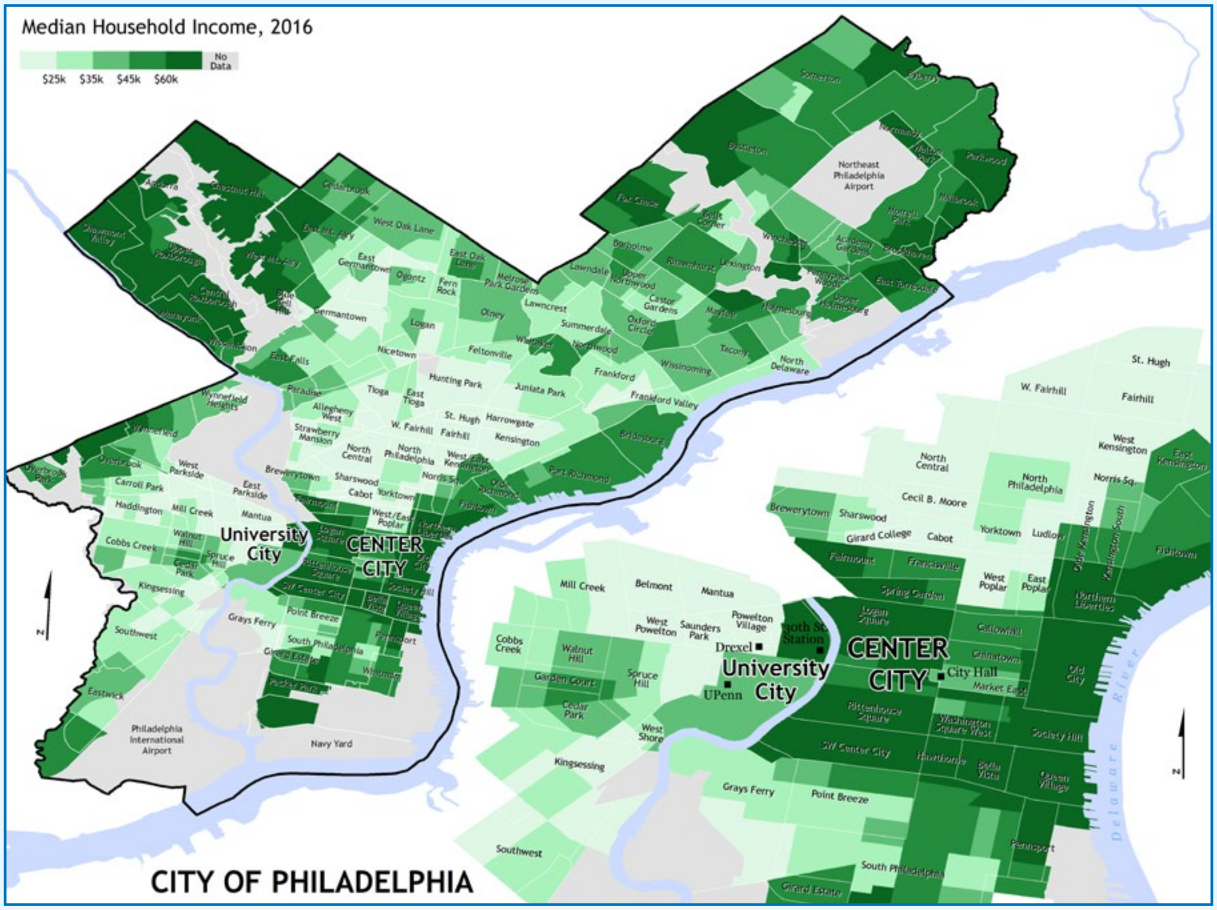
THE INCOME DIVIDE

Philadelphia is also divided by income. This pattern can be seen in Figure 4, which charts median household income across the city. On this map, high-income areas are shown in dark green, and low-income areas are shown in light green. Here, the divided patchwork pattern of concentrated advantage and disadvantage is even more pronounced.

High-income households are heavily concentrated in the northwest, in neighborhoods like Shawmont Valley and Chestnut Hill. The other major hub of high-income households is Center City, including neighborhoods like Old City and Society Hill. Gentrifying urban-core neighborhoods like Northern Liberties and Packer Park also have relatively high incomes. However, an even larger zone of North Philly, including neighborhoods like North Central, Fairhill, and many of their surrounding neighborhoods, consistently posts median household incomes below $25,000. Numerous West Philly neighborhoods, including Mantua and West Parkside, also have median incomes below $25,000.

The city's median household income of $39,770 in 2016 was among the lowest of the nation's big cities, ranking just 44th among the 50 largest U.S. cities, which is similar to Tucson, Fresno, and New Orleans and less than half that of higher-income cities like San Francisco or San Jose.

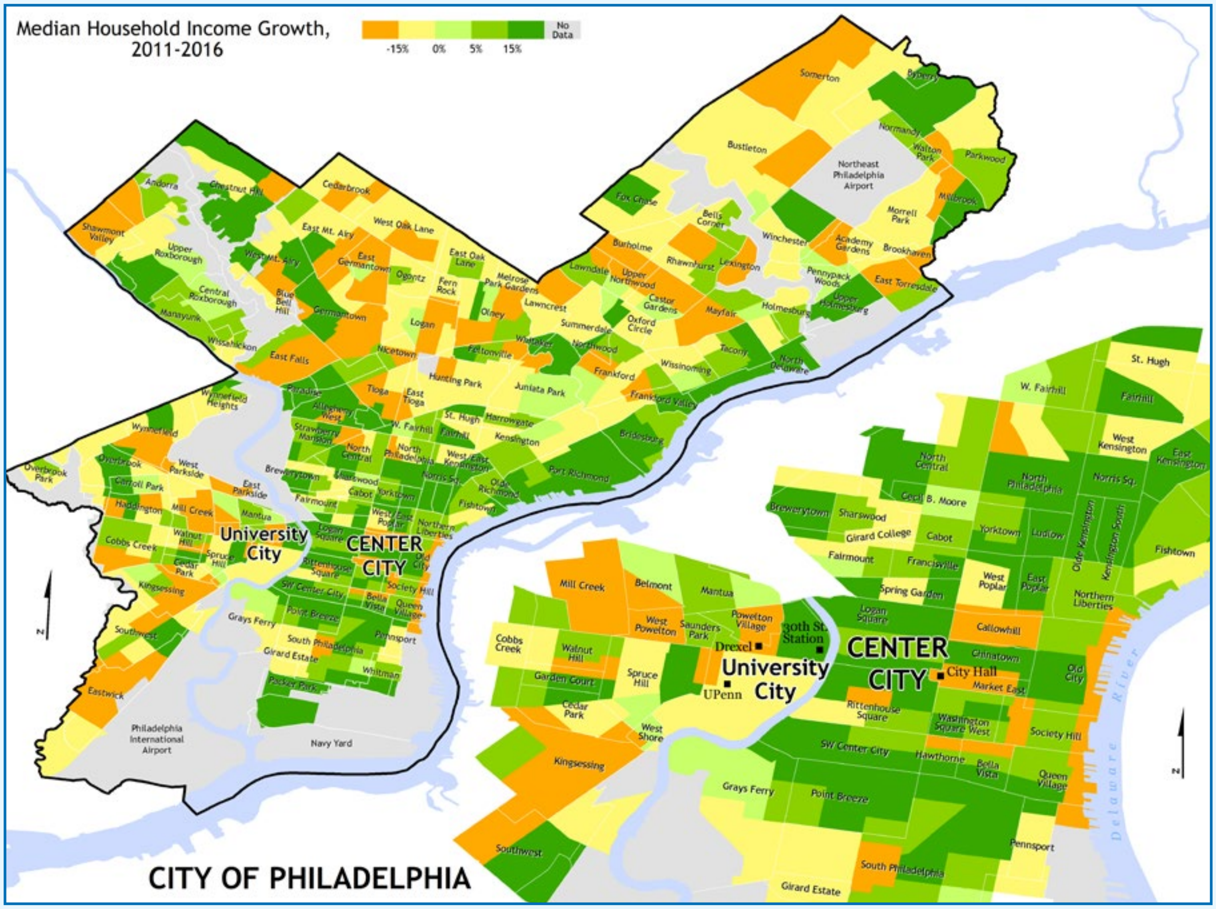
Figure 4: Philadelphia's Income Divide



Note: Median household income, based on tract-level census data, 2016

The same uneven pattern can be seen in Figure 5, which charts the rate of income growth. Areas experiencing income growth show up in green, and areas experiencing negative income growth are shown in yellow or orange. Large swaths of North Philly, including Hunting Park, Nicetown, and Tioga, actually saw negative income growth. A number of gentrifying West Philly neighborhoods, including parts of Garden Court and Mantua, saw strong income growth. But most of the neighborhoods posting strong income growth were already-booming Center City neighborhoods, like Logan and Washington Squares, and already-wealthy northwest neighborhoods, like Upper Roxborough and Wynnefield Heights. Overall, the city's median household income grew by about 1 percent (.9 percent) between 2011-2016, ranking 21st among the nation's 50 largest cities and just one-tenth the rate of higher-income cities like Seattle, Denver, and Austin.

Figure 5: Uneven Income Growth



Note: Change in median household income, based on tract-level census data, 2011-2016

THE EDUCATIONAL DIVIDE

Philadelphia's divides are also evident in educational attainment (Table 3). A stark indicator of this: the city has more adults without a high school diploma (17 percent) than with a graduate or professional degree (11 percent). Its share of adults who have only completed high school (33.5 percent) is double the share of those whose highest level of educational attainment is a bachelor's degree (15.5 percent). One bright sign: the city saw a 25 percent growth in college grads between 2011 and 2016, ranking it fourth among big cities, just ahead of Boston and Miami (Table 4).

Table 3: Educational Attainment

No High School Diploma	17.4%
High School Diploma	33.5%
Associate Degree and Some College	22.8%
Bachelor's Degree	15.5%
Advanced Graduate or Professional Degree	10.9%

Note: Educational attainment, based on census data, 2016

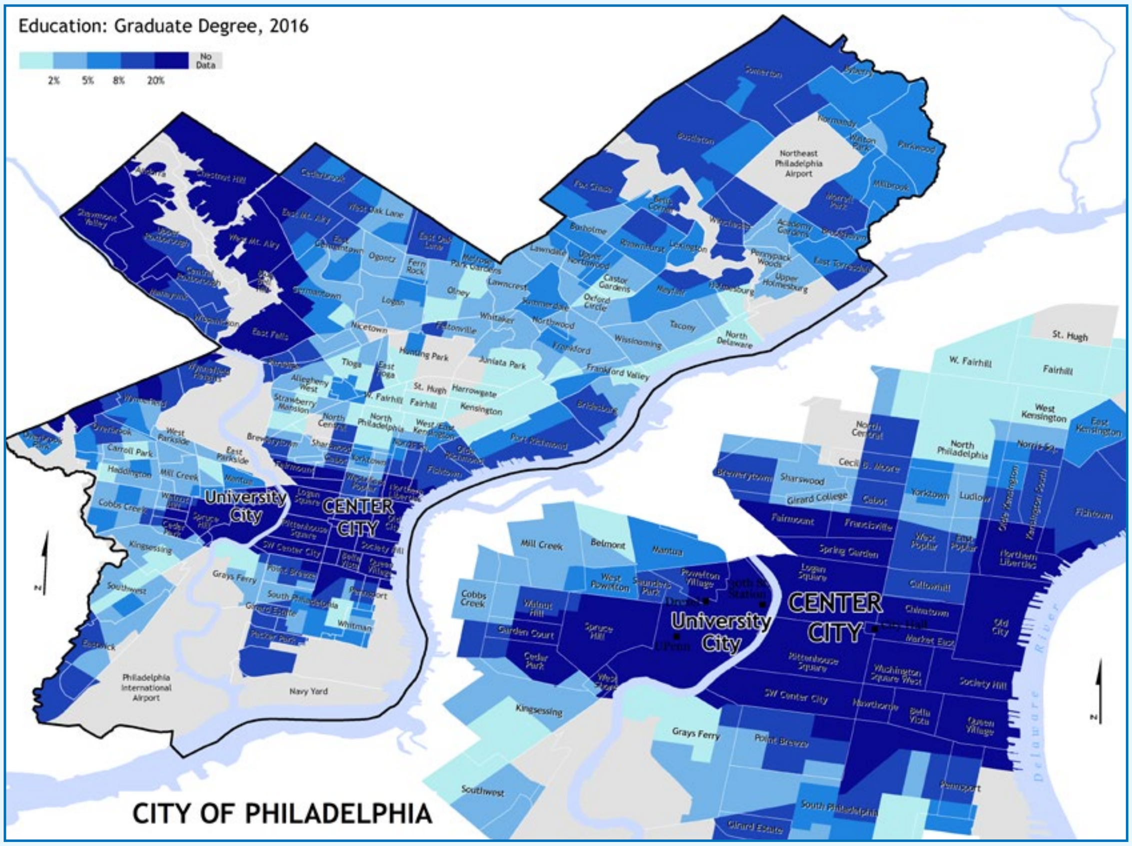
Table 4: Growth in College Grads

Rank	City	Growth in Adults with Bachelor's Degree and Above
1	New Orleans	39.9%
2	Austin	33.4%
3	Denver	30.1%
4	**Philadelphia**	**24.8%**
5	Boston	24.8%
6	Miami	23.9%
7	Portland	22.2%
8	Jacksonville	21.5%
9	El Paso	21.4%
10	Nashville	19.8%

Note: Five-year growth in adults with a bachelor's degree or higher, based on census data, 2011-2016

Figure 6 shows the considerable geographic divide among the highly educated, measured as the share of adults who hold an advanced graduate or professional degree. Advanced degree holders, shown in dark blue, are highly concentrated in a narrow band running from Center City, through University City, along the Schuylkill River, and up to East Falls, Germantown, Mt. Airy West, and Chestnut Hill. In the majority of neighborhoods outside of this band, less than 7 percent of adults hold an advanced degree, indicated by light blue.

Figure 6: The Uneven Geography of the Highly Educated



Note: Share of adults age 25 or older with a graduate or professional degree, based on tract-level census data, 2016

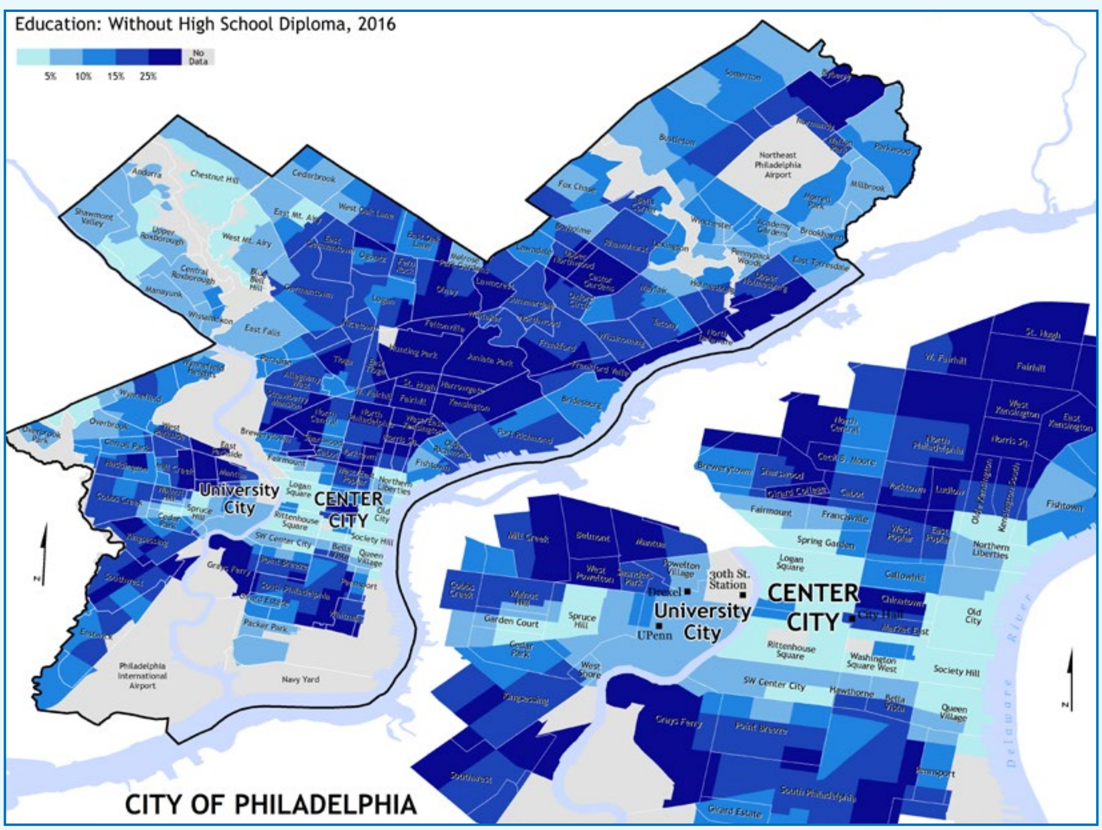
The next map (Figure 7) shows the geography of the least-educated: those who did not graduate from high school. Across the city, more than 180,000 (180,059) adults over the age of 25—17.4 percent of all adults—did not complete high school. And that group of people, shown in dark blue, is highly concentrated in the North Philadelphia neighborhoods of Upper Kensington, Feltonville, and Juniata Park, where 25 to 50 percent of adults did not complete high school. Byberry, Mill Creek, Grays Ferry, and Lower Moyamensing, in the south- and west-side neighborhoods, also have high proportions of adults who did not complete high school. By contrast, in wealthy Center City and northwestern neighborhoods like Chestnut Hill and Society Hill, shown in light blue, fewer than 5 percent of adult residents do not have a high school diploma.

Philadelphia's educational divide also registers in who is leaving the city. The Pew study cited above found that those who are leaving the city are disproportionately more highly educated, white, and young. Half of all those who moved from the city were between the ages of 18 and 34, a group that comprised just 30 percent of the city's population. Whites comprised 45 percent of those who moved out, compared to 30 percent for African-Americans, 13 percent for Hispanics, and 7 percent for Asians. More than a quarter of those moving out cited a lack of job opportunities. The next most common reasons were crime and safety (14 percent), cost of living (12 percent), better schools for their children (11 percent), and housing type and cost (11 percent).

And different demographic groups, especially those with different levels of education, cite different reasons for moving out of the city. As noted above, about 36 percent of those with a college degree or higher said job opportunities were their primary reason for moving, three times more than the next most-cited category. Just 4 percent of movers with a high school degree or less mentioned jobs as a primary reason for moving, but nearly a quarter (23 percent) mentioned crime and public safety. While the lion's share of people leaving the city did not have school-age kids, nearly a third of families with school-age kids cited the quality of schools, followed by crime and safety.

Indeed, education appears to be a more significant driver of out-migration than gentrification does. Eight percent of survey respondents said they were moving as a result of neighborhood change, and the figure was nearly twice as high for whites (8 percent) as blacks (4 percent). Black and white movers cited housing and cost of living at nearly equal rates, both around 10 percent.

Figure 7: The Geography of the Least-Educated



Note: Share of adults ages 25 or older who did not complete high school, based on tract-level census data, 2016

THE CLASS DIVIDE

Philadelphia is also divided by class. I have long defined class by the kinds of work people do, dividing society into three major classes. The advantaged creative class makes up 34 percent of the city's workforce, the low-paid service class makes up nearly half (49 percent), and the shrinking blue-collar working class accounts for just under a fifth (16 percent).

TABLE 5: Philadelphia's Class Structure

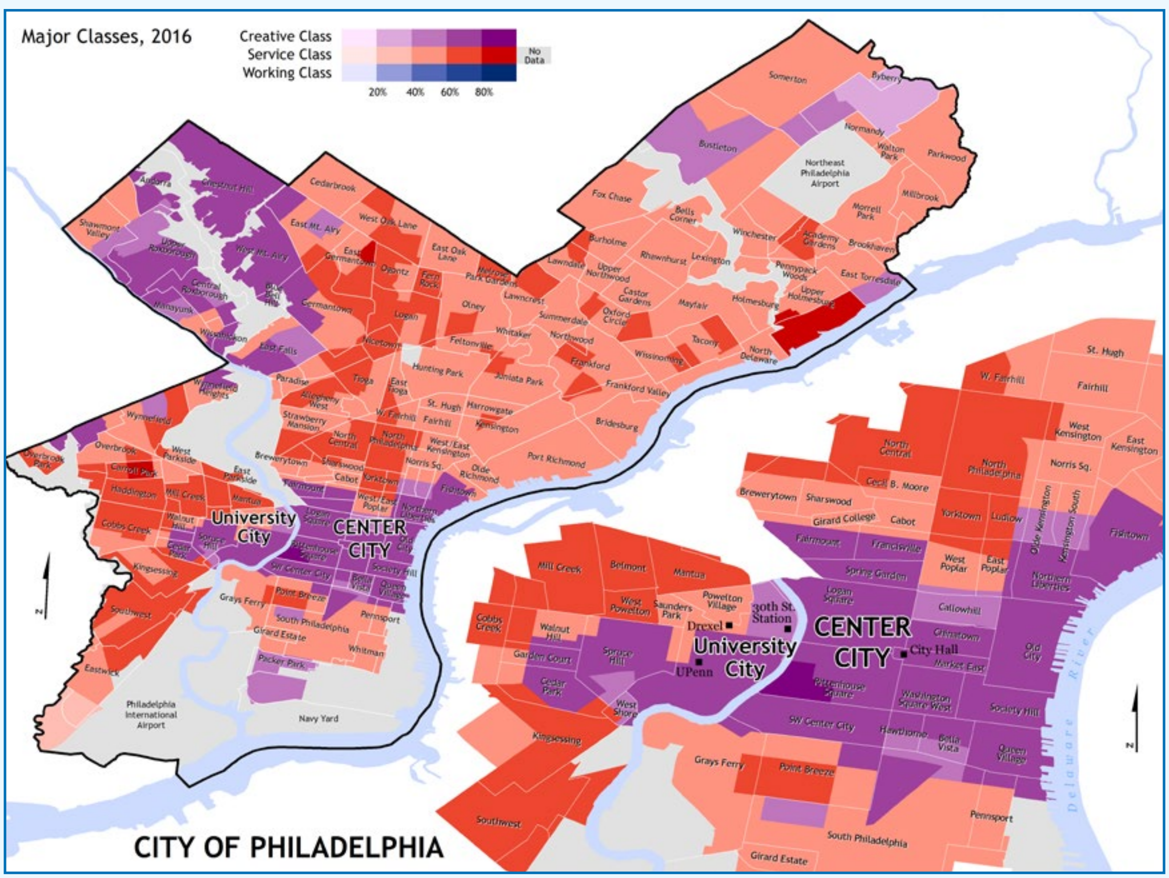
Service Class	49.2%
Creative Class	34.2%
Working Class	**16.4%**

Note: Share of labor force, based on census data, 2016. Definitions of the major classes follow Richard Florida, *The Rise of the Creative Class*, 2002. See Appendix A for complete definitions of the major occupational classes.

The next map (Figure 8) shows the city's class divide in stark relief. Neighborhoods, or tracts, where the creative class makes up a plurality of residents are marked in purple, while red represents the service class, and blue represents the working class. Darker colors indicate bigger pluralities.

The creative class predominates in and around the urban core and closely follows the same band as the population with advanced degrees. The creative class comprises more than 60 percent of the population in Northern Liberties, Logan Square, University City, and East Falls. The service class predominates in the vast majority of the city, including North Philadelphia neighborhoods like Strawberry Mansion, North Central, and Logan. West Philadelphia neighborhoods like Haddington and Carroll Park also have service-class rates greater than 60 percent. There are only a couple of blue dots on the map, where the working class still predominates—a striking commentary on the decline of manufacturing and of blue-collar work in what once was one of America's great industrial cities.

Figure 8: Share of Major Classes



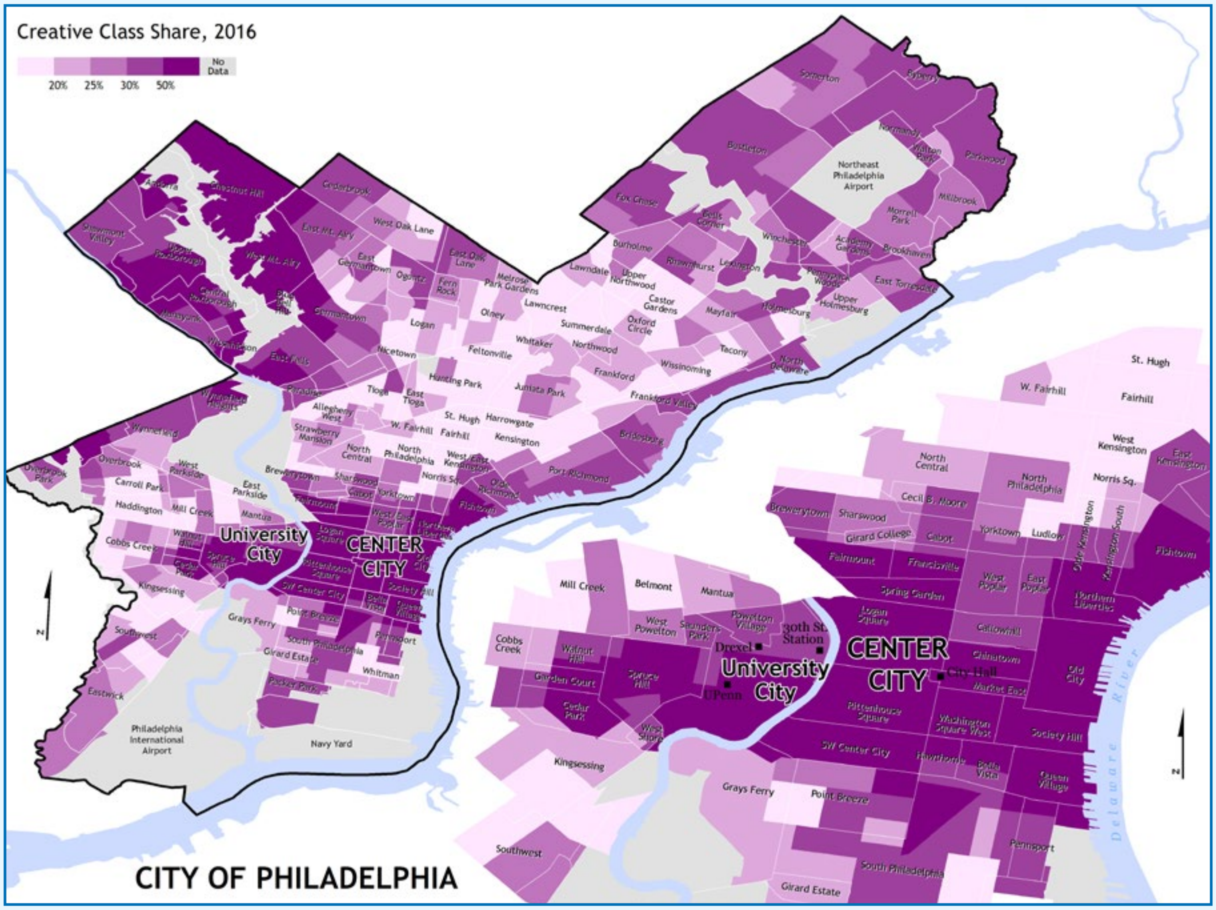
Note: Share of workers in the creative class, service class, and working class, based on tract-level census data, 2016. Definitions of the major classes follow Richard Florida, *The Rise of the Creative Class*, 2002.

The Creative Class

Philadelphia's creative class numbers about a quarter of a million (223,824) workers, the ninth-largest share among America's cities. The city has seen considerable growth in its creative-class population in recent years, which increased by 14.3 percent between 2011 and 2016. Philadelphia's creative-class median earnings of $51,429 are considerably above median earnings overall.

Figure 9 charts the concentration of the creative class by neighborhood, with areas of high concentrations showing up in dark purple and lower concentrations appearing in lighter purple. It demonstrates how few creative-class workers there are in poorer, North Philly neighborhoods like Feltonville and Fairhill. Meanwhile, the creative class makes up more than half of the population in a band running from Center City to the northwest.

Figure 9: The Uneven Geography of the Creative Class



Note: Share of workers in the creative class, based on tract-level census data, 2016

The creative class is not a monolith. It is made up of a cluster of highly educated, highly skilled, and high-paying occupations which span science and technology, arts and culture, business management, and the professions. Table 6 lists these major occupational clusters, and shows their growth in recent years.

Nearly 50,000 creative-class workers work in management, another 45,000 work in healthcare, 39,000 work in education, and 33,000 work in business and finance.

Other creative-class occupational groups are considerably smaller. About 14,000 workers work in the key knowledge economy fields of computer and math, and arts and culture, respectively. Computer and math occupations comprise roughly 2 percent of the city's workforce, ranking 39th among the nation's 50 biggest cities. These occupations grew by nearly 20 percent (18.8 percent) between 2011 and 2016, ranking 33rd among big cities.

Another 14,000 employees work in arts, design, and media fields. Also comprising about 2 percent of the workforce, this occupational subset is the 11th-largest among big cities. And it has only grown only 26.9 percent over the past five years, the eighth-highest growth rate among big cities.

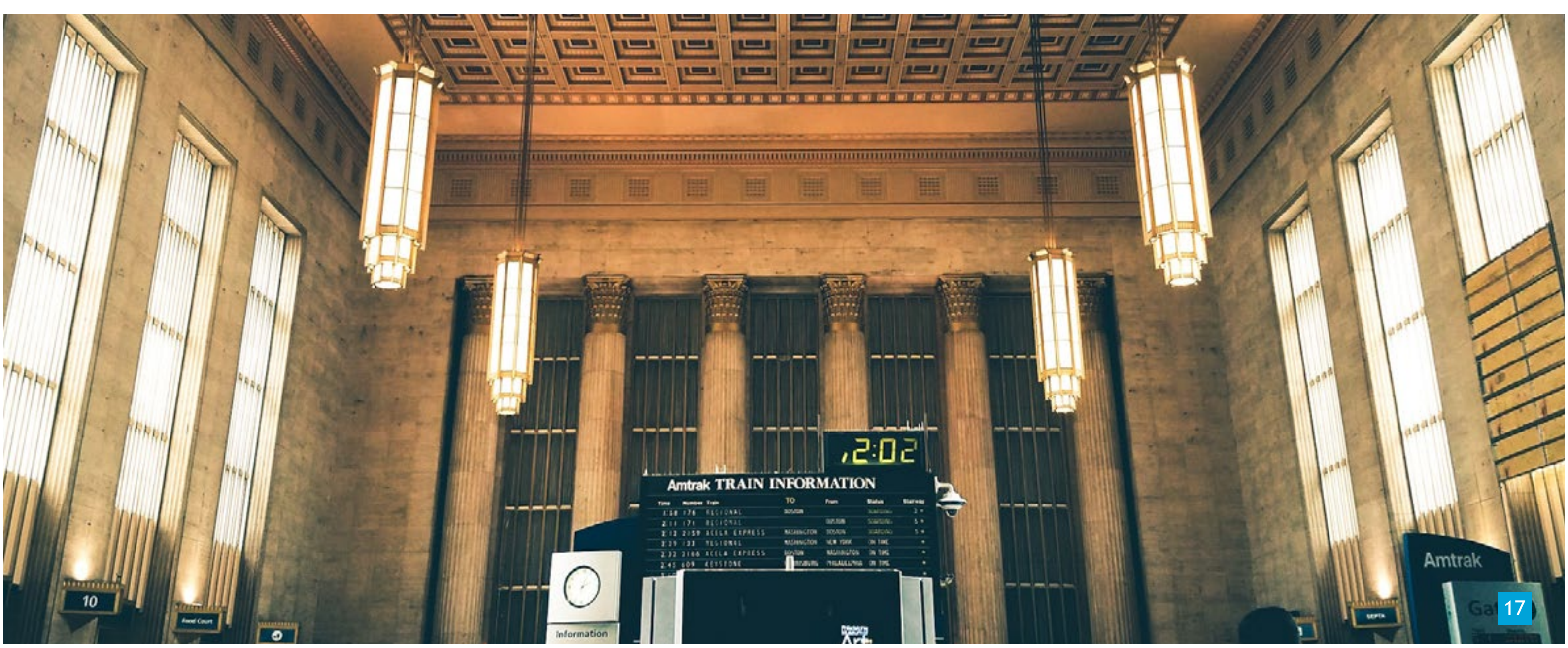
A bright spot in the city's creative class is the growth in science and tech workers. The city's science and tech workforce clocks in at more than 8,000 workers, eighth among the nation's 50 biggest cities. It makes up 1.2 percent of the workforce, ranking 14th, with growth of 8.6 percent between 2011 and 2016. This reflects the employment base provided by Philadelphia's universities and medical centers like Drexel, the University of Pennsylvania, Jefferson Health, and others.

The city's architecture and engineering workforce numbers more than 8,863 workers, ranking 12th among the nation's 50 largest cities.

Table 6: Major Creative-Class Occupations

	Number of Residents	Share of Residents	5-Year Growth Rate
Arts, Design, Entertainment, and Sports	14,199	2.2%	26.1%
Business and Financial Operations	33,138	5.1%	24.0%
Computer and Math	14,242	2.2%	18.8%
Architecture and Engineering	8,863	1.4%	17.0%
Management	49,462	7.6%	15.9%
Healthcare Practitioners	45,487	6.9%	14.0%
Science	8,095	1.2%	8.6%
Education and Training	38,819	5.9%	5.0%
Legal	11,519	1.8%	2.4%

Note: Growth in creative-class residents by occupation, based on census data, 2011-2016



The Service Class

Philadelphia's service class, comprised of low-wage, low-skill workers in fields like food service, home-care, and retail, numbers about 320,000, making it the sixth-largest of the nation's 50 biggest cities. (See Appendix A for a more-detailed description of the major occupational classes.) While it makes up nearly half of the city's workforce, the service class has grown slowly in recent years, increasing by just 3.1 percent between 2011 and 2016. This could mean that service-class workers are transitioning to better jobs or that they are being priced out of the city. The city's service-class workers are poorly paid, with median earnings of $26,195, which is about half of what the creative class earns.

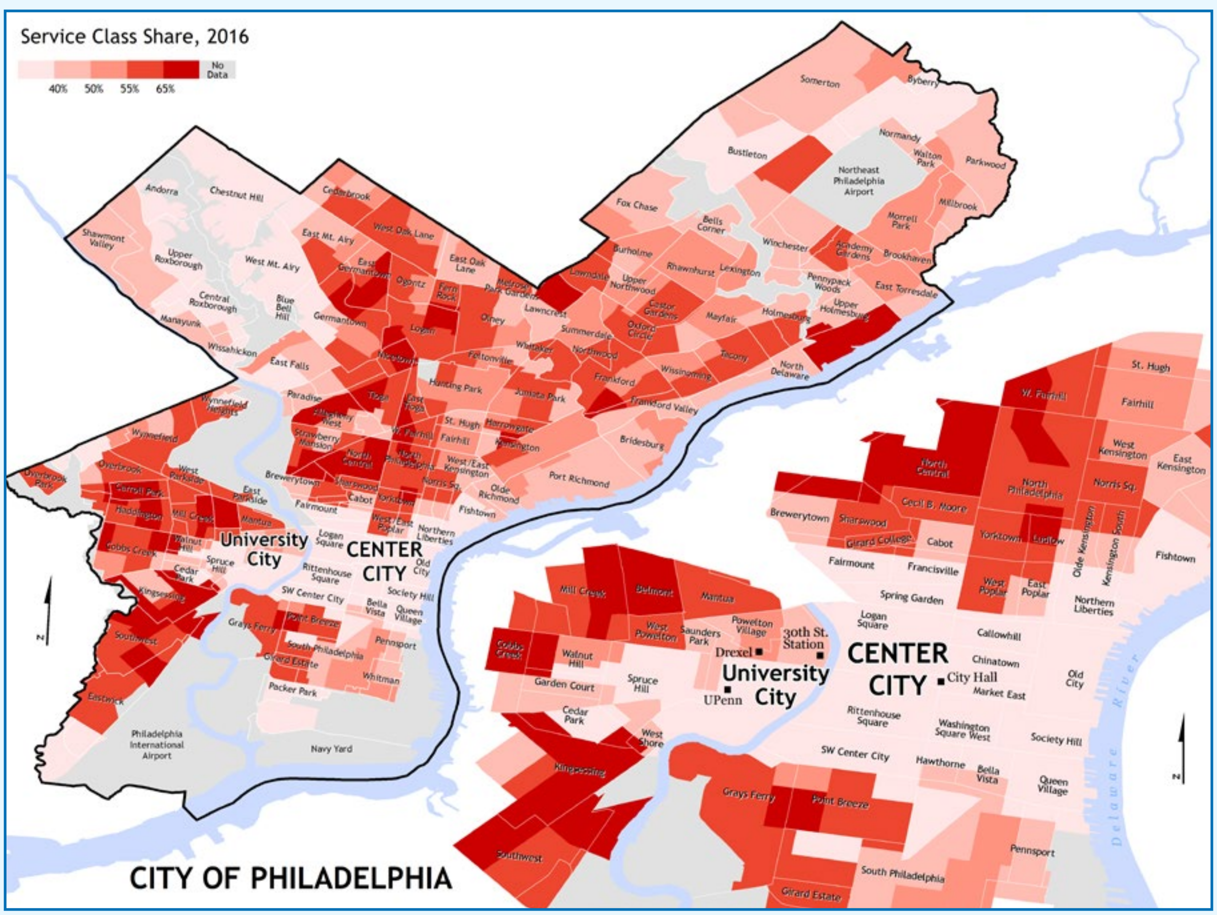
The dark red areas in Figure 10 show the huge concentrations of the service class in North and West Philadelphia, while areas with lower concentrations show up in pink. Center City neighborhoods like Old City and Rittenhouse, by contrast, have service-class populations below 40 percent. This suggests that many of the service workers who work in the numerous restaurants, office buildings, and other downtown places of employment are commuting from other neighborhoods.

The Working Class

Philadelphia's working class numbers just over 100,000 workers (107,165). This group has shrunk slightly in recent years, declining by 2.5 percent between 2011 and 2016. The members of Philadelphia's working class earn $30,765.

The general narrative of the working class in Philadelphia has been one of decline. For many decades in the 19th and 20th centuries, Philadelphia boosters proudly called the city the "workshop of the world." The manufacturing plants and workshops scattered throughout Philadelphia powered the city's growth in those years, and their closure was a major factor in the city's midcentury economic decline and urban crisis. Like many cities around the country, Philadelphia is still recovering from this economic transformation and searching for ways to adapt to the 21st century knowledge economy.

Figure 10: The Uneven Geography of the Service Class



Note: Share of workers in the service class, based on tract-level census data, 2016

PART 2: PHILADELPHIA'S NEW URBAN CRISIS

The city's striking, if concentrated and uneven, revitalization has brought with it a new urban crisis. This new urban crisis is different from the original urban crisis of the 1960s and 1970s. Where the old urban crisis was defined by economic decline and dysfunction, the new urban crisis is largely a crisis of success. As the affluent, the highly educated, and the creative class have revitalized the urban core and neighborhoods around great universities and knowledge institutions, less-educated service- and working-class workers have too often been excluded from the fruits of this prosperity. The new urban crisis is defined by several features: growing income inequality, a shrinking middle class, concentrated poverty and disadvantage, and deepening housing unaffordability, which we examine in turn.[19]

INCOME INEQUALITY

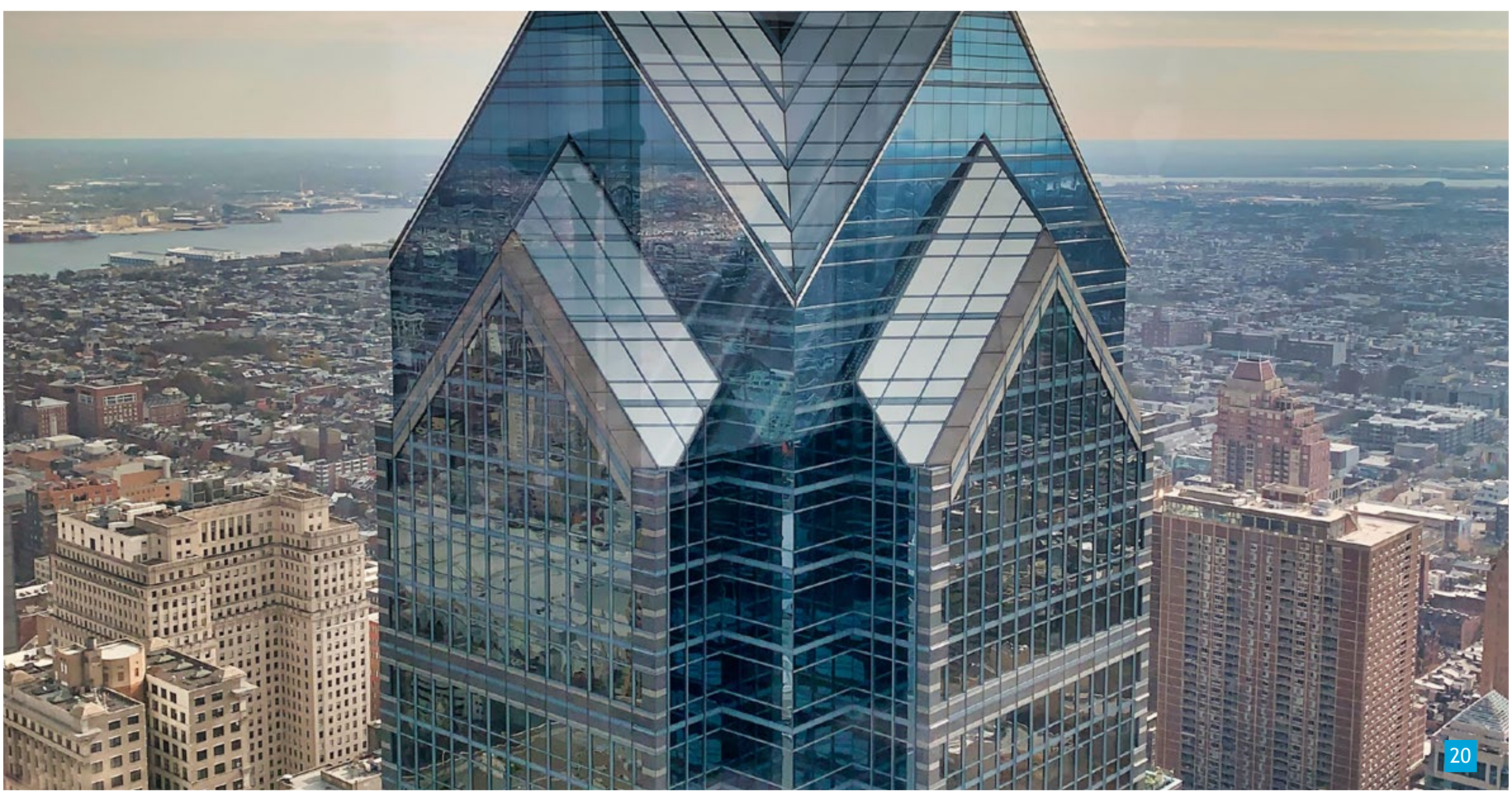
A key feature of the new urban crisis is income inequality. Philadelphia is the 16th-most-unequal big city in the country, as measured by the Gini coefficient, the standard measure of income inequality. That's similar to Baltimore, Oakland, and Detroit. Or to put it in a comparative context, the city's level of income inequality is similar to that of Colombia.[20]

Table 7: How Philadelphia Stacks Up on Income Inequality

Rank	City	Gini Coefficient
1	Atlanta	0.582
2	New Orleans	0.570
3	Miami	0.567
4	New York City	0.547
5	Dallas	0.543
6	Boston	0.541
7	Washington, D.C.	0.533
8	Los Angeles	0.532
9	Houston	0.528
10	Chicago	0.527
16	**Philadelphia**	**0.512**

Note: Income inequality measured by the Gini Coefficient, based on census data, 2016. For an explanation of the Gini Coefficient, see "U.S. Income Distribution: Just How Unequal?" by Salvatore Babones.[21]

Another consequence of inequality is that the city also suffers from a high degree of social disconnection. A 2019 study by researchers at Harvard University used Twitter data to examine the level of social connectedness of neighborhoods in American cities, as measured by the extent to which residents travel between neighborhoods. Philadelphia was one of the most disconnected cities, according to the study, similar to economically depressed cities like Detroit, Cleveland, Baltimore, and Milwaukee. Philadelphia residents are unlikely to move among many neighborhoods, as in San Francisco or San Diego, or congregate in a single, social hub, like Manhattan in New York City. This kind of neighborhood isolation works to reinforce persistent poverty by limiting access to opportunity and economic mobility.[22]



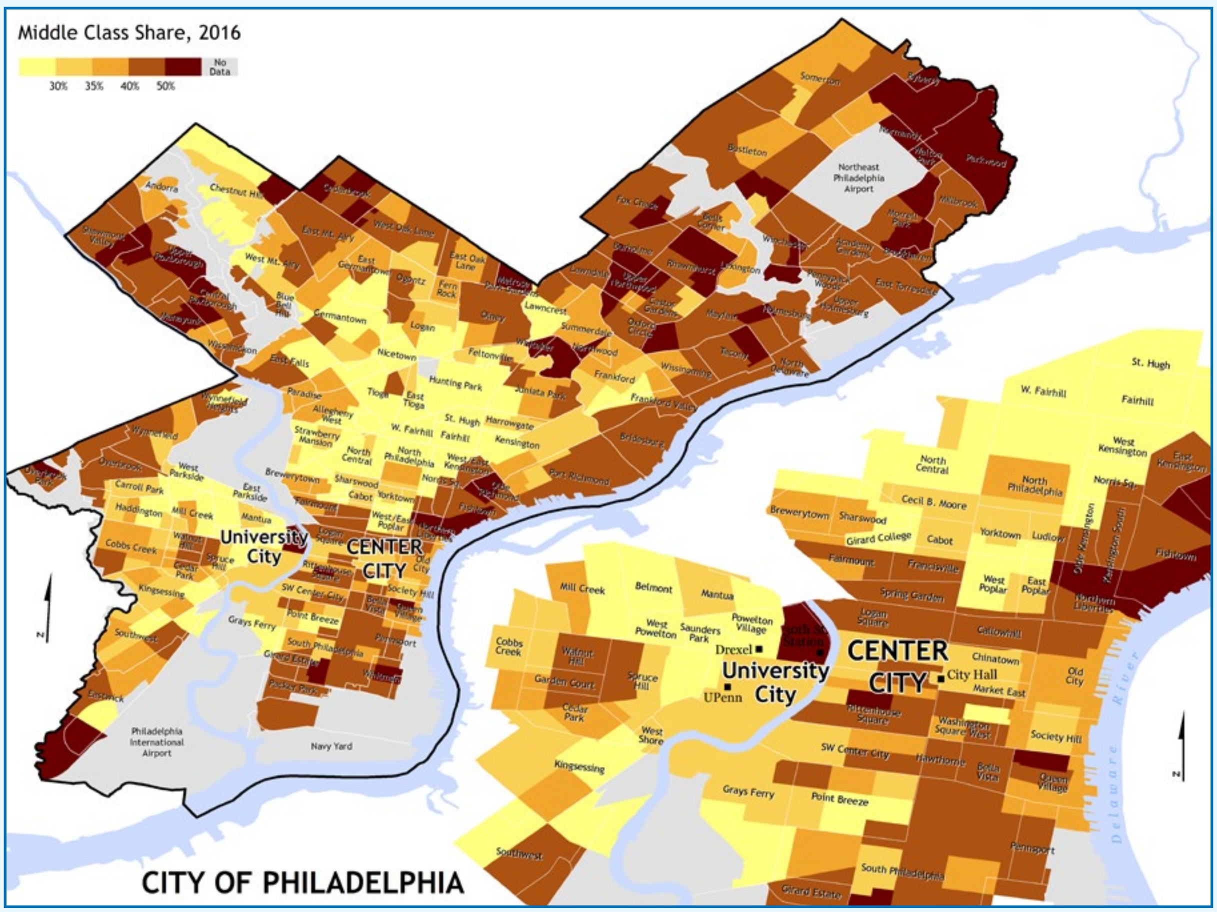
SHRINKING MIDDLE CLASS

A second feature of the new urban crisis is the decline of the middle class. Between 1970 and 2012, the share of Americans living in middle-class neighborhoods declined from roughly two-thirds to just 40 percent, as inequality increased and families sorted into rich and poor neighborhoods. Over the past decade-and-a-half or so, 90 percent of metropolitan areas across the country have seen declines in their middle-class populations.[23]

Fewer than 40 percent (39 percent) of Philadelphians are members of the middle class, placing the city 39th among the nation's 50 biggest cities. And the city's middle class actually shrank by about 2 percent (1.9 percent) between 2011 and 2016, which is 36th among those 50 largest cities.

Figure 11 charts the uneven geography of the middle class across Philadelphia's neighborhoods. Areas with higher proportions of middle-class residents stand out in dark brown, with lower proportions shown in orange. Center City and South Philly neighborhoods like Old City and Northern Liberties have slightly higher than average middle-class shares. North and West Philly, as well as wealthier northwest neighborhoods like Chestnut Hill, have middle-class shares below 20 or 30 percent. A diverse set of neighborhoods, including Byberry, Morrell Park, and Cedarburg, all have high middle-class shares.

Figure 11: The Uneven Geography of the Middle Class



Note: Share of households in the middle class, based on tract-level census data, 2016. We measure middle-class households as those earning between two-thirds and double the national median household income.

CONCENTRATED POVERTY

A third and even more vexing dimension of the new urban crisis is concentrated poverty and disadvantage. As the urban middle class has declined, a defining feature of the new urban crisis is the juxtaposition of large spans of concentrated poverty and disadvantage surrounding much smaller clusters of concentrated advantage. Where concentrated poverty was once a feature of cities, and economic advantage was concentrated in the suburbs, today, areas of concentrated advantage and disadvantaged span both.

A large body of research documents the intergenerational persistence of concentrated poverty, illuminating the enormous toll it takes on less-advantaged groups and neighborhoods and the disturbing extent to which it overlaps with race in America.[24] Across the nation, two-thirds of African Americans raised in poor neighborhoods remained trapped in poverty as adults.[25]

While gentrification gets a great deal of attention, concentrated poverty remains the bigger problem in America's cities today. Consider this striking statistic: Across the country, for every neighborhood that has gentrified since 1970, 10 have remained poor and an additional 12 have become poor.[26] And, despite a few prominent exceptions, most poor black neighborhoods are stuck in cycles of persistent poverty and have proven impervious to gentrification. A comprehensive study found that poor neighborhoods with at least 40 percent black residents are far more likely to stay poor than to gentrify or develop economically.[27]

Philadelphia has a notoriously high rate of poverty that is disproportionately concentrated in certain neighborhoods. More than a quarter (25.9 percent) of Philadelphia residents live in poverty (Table 8). That's the seventh-worst rate in the nation, similar to New Orleans and Memphis. More than a fifth of the city's households (20.4 percent) live below the poverty line, also the seventh-worst rate in the country.

Table 8: Big Cities with the Highest Poverty Rates

Rank	City	Poverty (%)
1	Detroit	39.4%
2	Fresno	30.0%
3	Milwaukee	28.4%
4	Miami	27.6%
5	Memphis	27.6%
6	New Orleans	26.2%
7	Philadelphia	25.9%
8	Tucson	25.1%
9	Atlanta	24.0%
10	Baltimore	23.1%

Note: Share of residents living below the poverty line for the 50 largest cities, based on census data, 2016

Concentrated poverty overlaps substantially with race. The city's African-American poverty rate is more than 30 percent (30.7 percent), and its Hispanic poverty rate is over 40 percent (40.2 percent), compared to a white poverty rate of just 14.9 percent. The city's Hispanic poverty rate is the third-highest of the nation's 50 largest cities (Table 9).

Table 9: Cities with the Highest Hispanic Poverty Rate

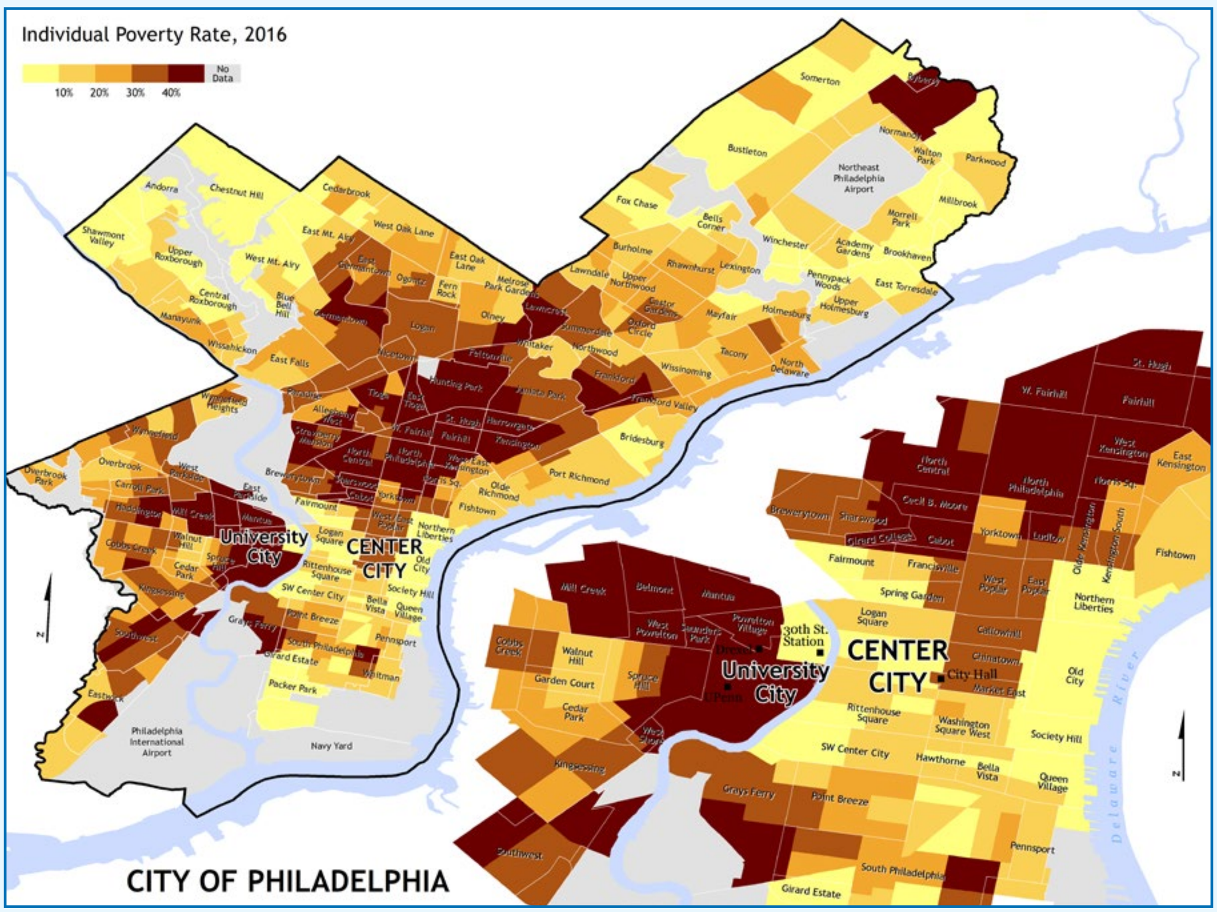
Rank	City	Poverty (%)
1	Memphis	41.8%
2	Detroit	40.8%
3	Philadelphia	40.2%
4	Indianapolis	37.8%
5	Fresno	35.8%
6	Phoenix	33.0%
7	Boston	32.8%
8	Milwaukee	32.5%
9	Columbus	32.4%
10	Nashville	31.4%

Note: Share of Hispanic residents living below the poverty line for the 50 largest cities, based on census data, 2016

Across the Philadelphia metro, nearly a quarter (24 percent) of residents live in economically declining neighborhoods, while just 7 percent live in economically expanding neighborhoods. In the metro's economically expanding neighborhoods, the population of low-income residents declined by 20 percent, and the population of African Americans declined by nearly a quarter (24.2 percent) between 2000 and 2016, while the population of whites increased by nearly a quarter (23.6 percent), and the population of college-educated residents increased by a whopping 120 percent.[28]

The next map (Figure 12) charts the highly uneven geography of concentrated poverty in Philadelphia. Poorer neighborhoods show up in brown, and low-poverty neighborhoods appear in yellow. The key divide is between the urban core and North and West Philly. More than 40 percent of households in North Philly neighborhoods Hunting Park, Logan, Strawberry Mansion, and numerous surrounding neighborhoods live in poverty. The same is true in West Philly neighborhoods like Carroll Park, Cobbs Creek, and Paschall. While there is a zone of concentrated poverty to the south of downtown in neighborhoods like Greys Ferry, much of the urban core has poverty rates below 20 or 30 percent, the same rate as many more suburban-style neighborhoods to the northwest and northeast.

Figure 12: The Geography of Poverty in Philadelphia



Note: Share of individuals in poverty, based on tract-level census data, 2016

THE HOUSING AFFORDABILITY DIVIDE

A fourth dimension of the new urban crisis revolves around housing affordability. In the old urban crisis, cities were affordable literally by definition, as the affluent and the middle class decamped for the suburbs. But beginning around the year 2000 and then accelerating after 2010, the affluent and the educated began streaming back to cities, causing housing prices to skyrocket.[29]

This process of gentrification has gone hand in hand with the urban revival.[30] Over the past decade or so, this phenomenon has spread from a relatively select group of superstar cities like New York and leading knowledge hubs like Boston and San Francisco to a much broader group of cities, including Philadelphia. Roughly 15 percent of Philadelphia's neighborhoods gentrified between 2000 and 2013, according to a study by the Federal Reserve Bank of Philadelphia. The neighborhoods experiencing the fastest, most-dramatic gentrification are concentrated near Center City and major universities.[31]

Despite such gentrification, Philadelphia does not face anything remotely like the extreme housing affordability crisis of the nation's leading superstar cities and tech hubs. Its relative housing affordability has been a big part of what has powered its urban revival up to this point. Housing prices in the city remain affordable compared to superstar cities and tech hubs, as Table 10 shows. With a median housing value of about $150,000, Philadelphia has housing costs which are more similar to Sunbelt cities like Houston and Dallas than to nearby New York, Boston, and Washington, D.C., never mind the sky-high housing costs of San Francisco, Seattle, or Los Angeles. In fact, housing costs in Philadelphia are less than a third of those of its neighbors across the Boston-New York-Washington, D.C. corridor, a quarter of cities like L.A. and Seattle, and just one-seventh of San Francisco.

Table 10: Housing Costs

Rank	City	Median Housing Value
1	San Francisco	$858,800
2	San Jose	$658,000
3	New York City	$508,900
4	Washington, D.C.	$506,100
5	Oakland	$500,500
6	Los Angeles	$496,300
7	San Diego	$488,600
8	Seattle	$484,600
9	Long Beach	$448,800
10	Boston	$423,200
31	**Philadelphia**	**$147,300**

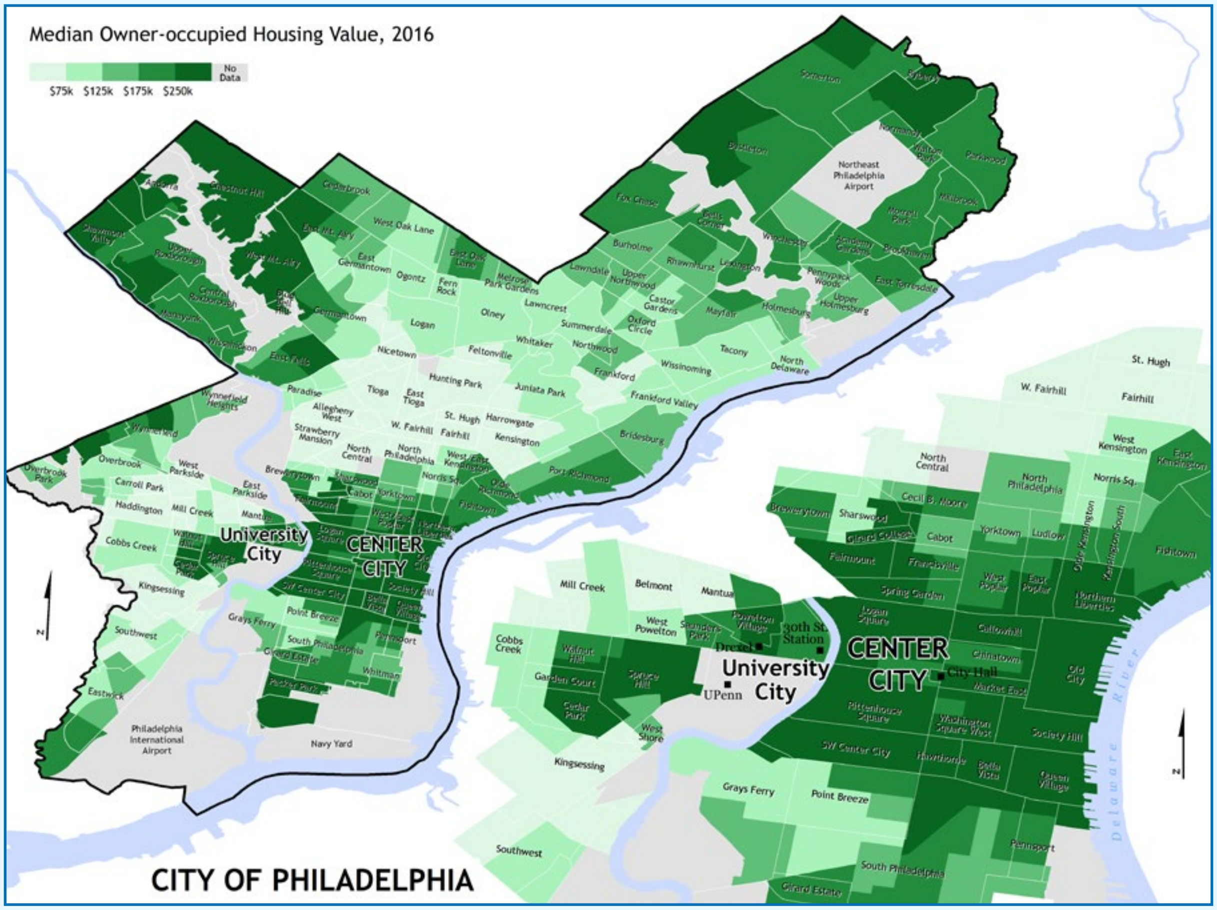
Note: Median housing values, based on census data, 2016

But, and this is a very important but, Philadelphia median prices do not tell the whole story. The city suffers from an acute housing divide across its neighborhoods. Figure 13 highlights these divides, showing housing prices across the city's neighborhoods. In neighborhoods like Chestnut Hill, Spruce Hill, and Society Hill, shown in dark green, median home values are greater than $250,000. Yet, large swaths of the city have home values of $75,000 or less, shown in light green, especially in low-income North Philly neighborhoods.

This divide comes into even sharper relief when we use more-localized and current data (via the real estate analytics firm [Trulia)](). The median listing prices in parts of Rittenhouse and Fitler Squares are $700,000 or more, with individual homes being listed for over a million dollars. Meanwhile, parts of Fairhill, Kensington, Glenwood, and other North Philly neighborhoods have list prices below $50,000.[32]

Another way to look at the city's housing divide is to examine the percentage of households who face extreme housing cost burdens. Severely cost-burdened households are those that spend more than 35 percent of their incomes on housing. Nearly a third (29.3 percent) of all Philadelphia homeowners are severely cost-burdened, and these households are highly concentrated in certain parts of the city.

Figure 13: The Uneven Geography of Housing Values

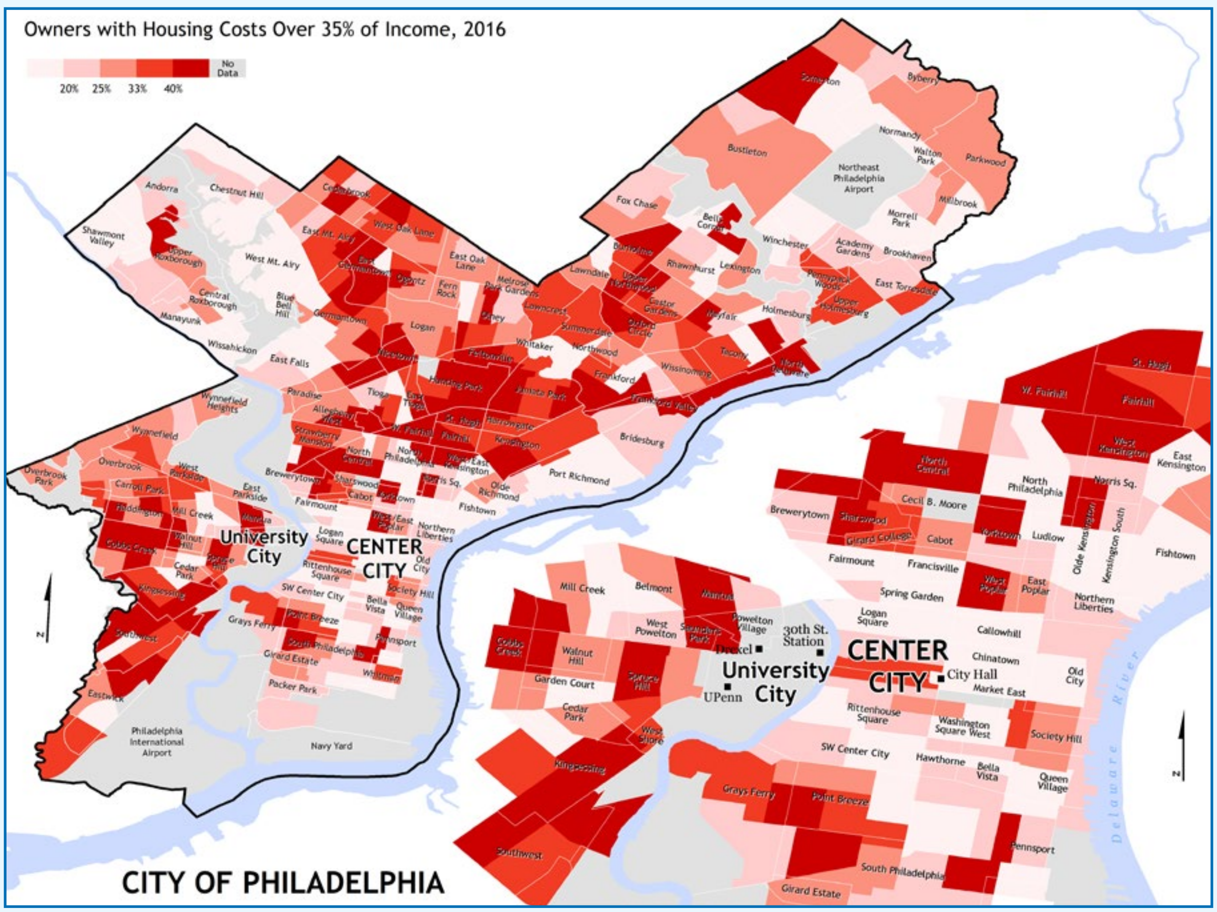


Note: Median housing values, based on tract-level census data, 2016

Figure 14 shows areas with high proportions of severely cost-burdened homeowner households in dark red and those with lower proportions in pink or white. While low-income North and West Philly neighborhoods tend to have the highest rates of severely cost-burdened homeowner households, it's clearly a problem all over the city, including in wealthy, expensive neighborhoods like Rittenhouse Square and Upper Roxborough. In a few North and West Philly neighborhoods, including Nicetown, Hunting Park, and parts of Cobbs Creek, more than 50 percent of homeowners are severely cost-burdened.

With wages low across the board—the median household income in Philadelphia is just $39,770—people across the economic spectrum are burdened by housing costs. In low-income neighborhoods, where housing is relatively cheap, extremely low wages have the effect of making housing unaffordable to many. Even for higher-income people, relatively low wages make housing in more-expensive areas difficult to afford. This is an issue that cuts across geographic and class lines, although, as with other such issues, the poor are disproportionately harmed.

Figure 14: The Geography of Severely Cost-Burdened Homeowners



Note: Share of homeowners who spend more than 35 percent of their income on housing, based on tract-level census data, 2016

HOUSING COST BURDENS FOR RENTERS

Renters fare even worse. Philadelphia's median gross rent is less than a $1,000 a month ($943), quite a bit less than Washington, D.C., Boston, and San Jose and comparable to Baltimore, New Orleans, and Phoenix.

Still, almost half (48.3 percent) of the city's renters spend more than 35 percent of their incomes on housing, the seventh-highest rate of the nation's 50 biggest cities.

Table 11: How Philadelphia Stacks Up on Rent

Rank	City	Gross Rent
1	San Jose	$1,689
2	San Francisco	$1,632
3	San Diego	$1,427
4	Boston	$1,369
5	Washington, D.C.	$1,362
6	New York City	$1,294
7	Seattle	$1,266
8	Virginia Beach	$1,258
9	Los Angeles	$1,241
10	Oakland	$1,189
25	Philadelphia	$943

Note: Median monthly rent, based on census data, 2016

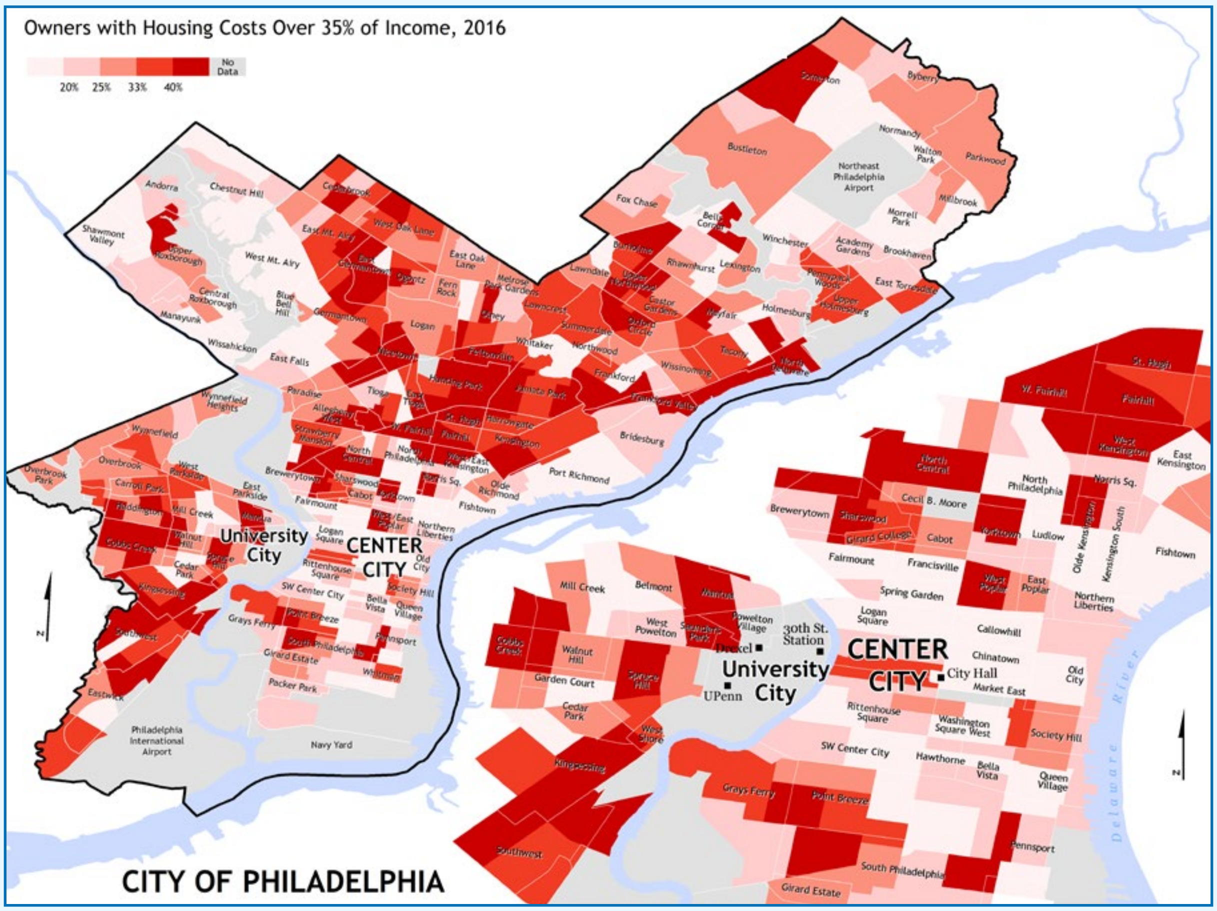
Table 12: Cities with the Largest Share of Cost-Burdened Renters

Rank	City	Cost Burden Renters (%)
1	Miami	56.7%
2	Detroit	56.3%
3	Fresno	52.5%
4	Los Angeles	51.8%
5	New Orleans	51.7%
6	Memphis	48.5%
7	Philadelphia	48.3%
8	Milwaukee	47.7%
9	Tucson	47.4%
10	Long Beach	46.0%

Note: Share of renters who spend more than 35 percent of their incomes on rent, based on census data, 2016

Severely cost-burdened renters are fairly distributed across the city, with greater proportions in poor areas but also in many middle-class and even some wealthy areas. Neighborhoods with larger concentrations of severely cost-burdened rental households are shown in dark red in Figure 15, while those with smaller concentrations are in pink or white. Most Center City and Northwestern neighborhoods have fairly low rates of severely cost-burdened rental households. But middle- and even upper-middle-class neighborhoods, like Byberry, West Oak Lane, and Andorra, all have rental cost-burden rates above 60 percent, similar to very low-income North Philly neighborhoods, like Juniata Park and Hunting Park.

Figure 15: The Geography of Cost-Burdened Renters



Note: Share of renters who spend more than 35 percent of their income on housing, based on tract-level census data, 2016

PART 3: AN AGENDA FOR INCLUSIVE PROSPERITY

Our data analysis and maps tell the story of two Philadelphias: one thriving and reviving, the other stuck in concentrated and persistent poverty. As remarkable as the city's comeback and revival have been, its gains have been concentrated in just a few neighborhoods, mainly in and around the urban core and its major anchor institutions. Meanwhile, large spans of the city, especially in North and West Philadelphia, remain mired in chronic and persistent poverty.

Philadelphia's *next challenge* is to bridge these divides and expand its recent urban revival to include many more residents and many more neighborhoods. This report focuses on how the city's anchor institutions, which have played such a central role in the city's urban revival and economic growth, can spearhead a more-inclusive prosperity for the entire city.

It is convenient for some to blame the city's anchor institutions for gentrification and socio-economic division. But without the concerted action of these institutions, Philadelphia would be in far worse economic shape today. Gentrification is the hottest of all hot-button issues, with activists and others bemoaning the colonization of urban neighborhoods by big institutions and affluent groups. But the most recent empirical research suggests that the effects of gentrification are more nuanced. While there are certainly cases where gentrification displaces low-income residents—and we should all be concerned when people are driven from their homes—the reality is that gentrification does not massively displace people. In fact, this recent research suggests that gentrification tends to generate more benefits than costs.

A series of landmark studies of gentrification conducted in the early 2000s by Lance Freeman, an urban planning professor at Columbia University, found that the notion of gentrification generating massive displacement is more myth than reality. Homeowners in gentrifying neighborhoods tended to end up better off financially. Renters were not significantly more-likely to be displaced in gentrifying neighborhoods than in non-gentrifying ones. Indeed, low-income residents of gentrifying neighborhoods were just as likely to move out of the neighborhood as those in non-gentrifying neighborhoods.[33]

Two more recent studies provide additional evidence that gentrification may actually benefit low-income residents in certain ways. The first, by the Federal Reserve Bank of Philadelphia, studied residents of low-income urban neighborhoods in the nation's 100 largest metro areas between 2000 and 2014. The study found that gentrification accounts for around 10 percent of the moves made by less-educated renters across the study area—meaning 90 percent of the time, when a less-educated renter moved, gentrification was not the cause. The study also found that low-income and less-educated people who are able to remain in a neighborhood as it gentrified experienced reduced exposure to poverty, which is correlated with better health and education outcomes in children.[34]

The second study, by researchers from NYU's Furman Center for the National Bureau of Economic Research, used Medicaid data to track the residences of low-income children in New York City between 2009 and 2015—a period when the city was rapidly gentrifying. The study found that low-income children move a great deal, no matter what kind of neighborhood they live in. Indeed, children living in market-rate housing in gentrifying neighborhoods were no more likely to move over the study period than those living in non-gentrifying neighborhoods.[35]

These studies suggest that the costs of gentrification can be mitigated, and its benefits can be deepened and extended with policies and strategies to encourage more-inclusive development. Philadelphia's anchor institutions have been considerably more sensitive to gentrification than most other large urban institutions in cities across the country, as we will see.

Still, our research shows that Philadelphia has experienced an uneven urban revival, and that today's greatest challenge is to create a more-inclusive prosperity that can extend to all of the city's neighborhoods and residents.

Philadelphia's city government has made inclusive growth and development a key priority. In May 2019, the city released a signature report entitled Growing with Equity: Philadelphia's Vision for Inclusive Growth. The report highlights the city's divides and challenges and outlines a path toward more-inclusive prosperity. This agenda for inclusive growth is based on three key pillars: growing the economy to create family-sustaining jobs, training Philadelphians for these jobs, and fostering growth across neighborhoods without displacement.[36] Additionally, the Federal Reserve Bank of Philadelphia has launched a new Economic Growth and Mobility Project focused on the role of race, gender, and geography in economic mobility.[37]

Over the course of this Philadelphia Fellowship, I have seen the many ways in which inclusive prosperity is already understood as a key guidepost for the city's future. Indeed, the city's anchor institutions, which have been central to its urban revival, have made inclusive development their priority as well. They have generated a series of initiatives to spur more-inclusive growth in their own immediate neighborhoods. And they have come together in an important collaborative effort, Philadelphia Anchors for Growth and Equity or PAGE, to leverage their capabilities to spur inclusive prosperity more broadly across the city.

The challenge today is to knit these efforts together in a more comprehensive and persistent way that can help extend a more-inclusive prosperity to neighborhoods, workers, and residents across the entire city. Philadelphia's anchors have historically been economic development leaders, powering much of the city's recent urban revival, and they are in a good position to lead going forward. This is not to diminish the role of government, which plays a central part in economic and community development. But anchor institutions have considerable resources, employ large numbers of people, and deploy large purchasing budgets. They are also nimbler and faster-moving than government and as such can pilot new initiatives and serve as urban laboratories for policies and programs that can be tested and scaled up over time.

The agenda for inclusive prosperity outlined below is shaped by our quantitative analysis, as well as by a comprehensive review of ongoing policies, strategies and efforts, and detailed interviews and conversations my team and I have had with Philadelphia business, political, and university leaders, non-profit groups, labor, civic groups, and neighborhood and community activists. (Appendix B provides a list of participants in our formal interviews and focus groups.) This agenda for inclusive prosperity can take shape around four key pillars.

- **Ensure Affordable Housing**
- **Create a More-Inclusive Innovation Economy**
- **Turn Low-Wage Service Jobs into Family-Sustaining Work**
- **Spread Prosperity to All Areas of the City**

Achieving this agenda for inclusive prosperity will require a require a persistent, intentional, and collaborative effort by the city's anchor institutions working alongside city government, business, neighborhood organizations, labor, and other civic and community stakeholders.

CREATE AND PRESERVE AFFORDABLE HOUSING

The future success of the city's economy and of its core anchor institutions depends on affordable housing. Indeed, affordable housing is a large part of what has spurred the city's urban revival in the first place. While Philadelphia does not suffer from the acute affordability problems of other leading superstar cities, its housing is growing more expensive, especially in core areas of the city, and its housing cost burdens are worsening across the board.

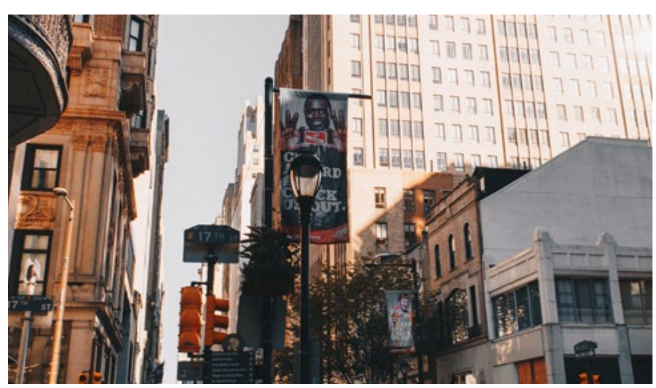
The city desperately needs more affordable and workforce housing near major employment centers for its large and growing class of low-wage service workers, as well as more-affordable housing for the disadvantaged and poor. On top of these pressing needs, the city would benefit from more housing development overall, which would provide more market-rate housing for its still-growing creative class, mitigating pressure on the housing market, and mitigating gentrification, as creative-class residents seek more reasonably priced housing in working-class neighborhoods.

The city's "Growing With Equity" report calls for a significant commitment to affordable housing, outlining a strategy for equitable growth without displacement. To meet this goal, the report outlines the need for both affordable and market-rate housing, zoning for greater density to allow for the creation of 6,500 units of affordable housing, 3,000 units of workforce housing, and an additional 7,500 units of market-rate housing by 2025, as well as the preservation of 31,750 units of affordable and workforce housing. It also calls for expanded homeownership assistance, a new online building permit application platform that would streamline the planning and review process for new housing, and increased tenant protections.[38]

In addition, the city would benefit from liberalizing its zoning and building codes to enable the building of more housing at greater densities.[39] This does not just mean the construction of more high-rise towers. Zoning regulations can be reformed to allow triplex and fourplex apartment buildings in neighborhoods currently reserved for single-family homes, creating more efficient forms of "missing-middle" housing. In addition, better protections for renters and tenants, such as just-cause eviction controls, can help provide stability to gentrifying and chronically poor neighborhoods.

Governments, particularly federal and state governments, have been primary actors in affordable housing development, with their ability to provide sustained subsidies over many years. But with federal cutbacks and austerity, local actors, including anchor institutions, are now being called upon to fill in the gaps.

Philadelphia's anchor institutions are already moving on affordable housing and related issues. A major strategy has been to develop more campus housing for students to relieve pressure on the surrounding neighborhoods and the non-university-affiliated residents who live there. The University of Pennsylvania has taken a dual approach to this challenge: building and renovating dormitory and student housing, and leasing underutilized land on the edge of campus to real estate developers for the creation of several hundred privately supplied mixed-use apartment buildings with street-level businesses. The university's strategic infill development and investment in new campus dorms has created nearly 1,000 new units for undergraduate students. The university also operates the Neighborhood Preservation Development Fund, an off-campus portfolio of 20 multifamily residential buildings containing 400 apartments. The university purchased these properties when they were in a state of disrepair and has since upgraded them and leased them out to neighborhood residents at below-market rates. A number of anchors, including Temple University, have developed employee mortgage-assistance programs to help faculty and staff purchase homes near campus.



While building housing for students and establishing mortgage subsidies for faculty and staff are essential to avoid further "studentification" in the future, anchors should also consider broader initiatives to provide affordable housing for neighborhood residents. Stanford University has committed to building more than 2,000 new housing units, a quarter of which would be offered at below-market rates, as part of its forthcoming campus expansion. The announcement followed major housing pledges by Google, Microsoft, Facebook, Wells Fargo, Kaiser Permanente hospitals, and University Health Network in the Bay Area, Seattle, and Toronto.[40] The East Baltimore Development Initiative, in partnership with Johns Hopkins University, has built housing for both university affiliates and low-income families and seniors in its neighborhood. Of the nearly 500 units completed so far, more than half are being offered at below-market rates.[41]

RECOMMENDED ACTION

Anchors should build on and expand the work they have done to create more affordable, workforce, and student and faculty housing in their neighborhoods, with increased involvement from the private sector. Anchors should also work alongside city government and other groups to advocate at the state and federal levels for increased tenant protections, increased funds for affordable housing, and liberalized zoning rules that will help provide more affordable and workforce housing.

BUILD A MORE-INCLUSIVE INNOVATION ECONOMY

The transformation and development of Philadelphia's knowledge and innovation economy has been nothing short of remarkable. The metro region now ranks as one of the world's 25 leading startup ecosystems, pulling in about $1 billion dollars in venture capital to its high-tech startups each year, comparable to Washington, D.C., Toronto, and Tel Aviv.[42] Nearly 40 percent of the city's residents are members of the creative class, and nearly 30 percent have graduated college. However, the city's rise as a knowledge and technology hub has led to high levels of individual poverty and income inequality—with the 7th- and 16th-worst rates among the nation's 50 largest cities, respectively. A 2017 Brookings Institution study led by Bruce Katz, now a Distinguished Fellow at Drexel University's Lindy Institute for Urban Innovation and Director of the Nowak Metro Finance Lab, outlined the establishment of a leading-edge Innovation District in Philadelphia's University City.[43]

The city's challenge now is to expand its innovation economy to tap the full talents and full creativity of its people. Every single individual—and every neighborhood—has skills, talent, and creativity that can and must be leveraged. Philadelphia must work to harness the creative talents of each and every person and neighborhood. The city's anchor institutions are already active on this front and can play an even greater role going forward in creating a more-inclusive innovation economy for women, minorities, and less-advantaged groups and neighborhoods.[44]

The University City Science Center, for example, is expanding opportunity for less-skilled workers who lack access to high-tech jobs. It has created space in one of its new buildings for the Philadelphia office of the Cambridge Innovation Center (CIC), which provides workspaces for minority-led and community-serving organizations, including Coded by Kids, Backstage Philadelphia, and NFTE. Its FirstHand program provides hands-on STEM education opportunities, with some arts components, to local youth. The Science Center also provides spaces for local entrepreneurs to work and network. Quorum is a space for community meetings and special events, with a lounge that's open to the public and free drop-in workspaces. In these spaces, inclusion and innovation go hand in hand. Venture Café hosts weekly networking nights and programs like Black & Brown Founders for underrepresented entrepreneurs and Funding the Hustle for small business development.

The 10,000 Small Businesses initiative at the Community College of Philadelphia trains business people from underprivileged backgrounds. More than 400 Philadelphia small business owners had passed through the program as of August 2018.[45] Inner City Capital Connections has provided training to under-represented business owners for the past six years. More than 300 business owners have participated in this initiative, increasing revenue by an average of nearly 50 percent since graduating and collectively creating more than 700 jobs. Thomas Jefferson students can participate in the Blackstone LaunchPad program, which provides coaching for students interested in a wide variety of entrepreneurship opportunities, including nonprofits.

The city's anchor institutions are taking important steps toward inclusive innovation. Now the key is to expand these programs to more people and neighborhoods, and scale them up to attract broader support from both government and the private sector.

RECOMMENDED ACTION

Philadelphia's anchor institutions should continue to lead in their support of inclusive innovation, particularly for minority and women entrepreneurs. A major challenge will be scaling these programs so they can benefit a broader spectrum of entrepreneurs and innovators from all social backgrounds.

UPGRADE LOW-PAYING, PRECARIOUS SERVICE JOBS

A key pillar of inclusive prosperity must be to upgrade current low-paying, precarious service jobs into higher-paying, more-secure and stable, family-sustaining work. As we have seen, more than 300,000 Philadelphians—nearly half of the city's workforce—do this kind of work, toiling in low-wage, contingent, service-class jobs in food preparation, retail shops, and custodial and clerical work.

The workers who do these jobs are disproportionately women and minorities. As noted above, these service-class workers make a median salary of roughly $25,000 a year and have much less left over after paying for their housing. These jobs are here to stay, and they are among the fastest-growing jobs in the economy. The path to more-inclusive prosperity requires that these poorly paid jobs be upgraded and turned into better, higher-paying, family-supporting jobs. A key tool for improving low-wage jobs is to create a higher wage floor by increasing the minimum wage. A broad body of research shows that minimum wage increases (up to 50-60 percent of the local median wage) significantly boost the economic situation and living conditions of low-wage workers without harming service businesses or the broader economy.[46] Unfortunately, the Commonwealth of Pennsylvania has preempted its cities from increasing their minimum wage.

Philadelphia Mayor Jim Kenney has pledged to raise the minimum wage of city employees and contractors to $15 per hour by 2022. Anchor institutions, like Thomas Jefferson University Hospital and the University of Pennsylvania, have voluntarily raised their wages to $15 an hour. Other anchor institutions should follow suit and put their full weight behind this effort to provide workers with a living wage. This may not be $15 in every case, especially if it is calculated at a rate of 50-60 percent of the area median wage, but it is surely higher than the current minimum. Anchors should work with, and indeed orient, their selection of vendors, contractors, and suppliers based their adoption of a fair, living wage. Anchor institutions and the anchor collaborative can be powerful role models that send an important message to local businesses about the need to pay workers a fair living wage.

It is equally, if not more, important to create new and better jobs for low-wage workers. The city's Growing with Equity strategy calls for calls for more apprenticeships and skills-based training and is bolstering neighborhood job hubs to provide jobs to 16,000 young people. Philadelphia's anchor institutions have developed a series of key initiatives on this front. The West Philadelphia Skills Initiative (WPSI), a program with the University City District, has helped nearly 900 long-term unemployed people reenter the job market, generating more $33.5 million in collective wages. The initiative is leading a collaboration with Drexel University and the University City Science Center to support new job-training efforts in University City, with a special emphasis on STEM fields and is called, "Connecting Talented West Philadelphians to Life-Changing Jobs: A Collaborative Approach." This new program, with financial support from the Lenfest Foundation, will help scale the ongoing job-training efforts of the initiative, connecting underprivileged residents to innovation-sector opportunities in University City.

Temple University, in partnership with Goodwill Industries, has a program that enables residents to get a GED, thus massively improving their employability. As the educational partner on the Norris Homes affordable housing redevelopment project, the university awarded $1 million in youth scholarships and has separately provided $82 million in healthcare for North Philadelphia residents in recent years. The Temple University Collaborative on Community Inclusion researches strategies for including people with mental illness into the economy and society. The city's anchors must continue to lead in creating employment on-ramps, skills training, and internal career development programs to promote workers from within.

More can, and must, be done to upgrade low-wage service jobs and turn them into family-supporting work. It's easy to forget that the manufacturing jobs that built America's middle class in the middle of the 20th century were once bad jobs. They only became good jobs thanks to the collaboration of the federal government, private sector, and labor unions to forge a new social compact. Today, the same can be done for service-class jobs.

This kind of job upgrading, developed by MIT Sloan School of Management professor Zeynep Ton, has been called the "Good Jobs Strategy." Ton's research demonstrates that higher wages and better opportunities for advancement result in greater productivity and profits for companies. A number of leading companies already employ a version of this strategy. The Tulsa-based chain of QuikTrip convenience stores has offered higher pay, paid time off, profit sharing, healthcare and 401K plans to all employees, resulting in lower employee turnover and higher levels of productivity. The SAS Institute in Cary, North Carolina pays all of its workers a living wage and hires its service workers directly, instead of through an outside contractor. Popular consumer companies like Trader Joe's, Costco, Zara, and Four Seasons Resorts have adopted the good jobs strategy, leading to lower employee turnover, better customer service, and greater innovation, all of which, in turn, increase productivity and profits.[47]

Anchors employ a significant number of low-skilled workers in the city and can take the lead in implementing strategies to upgrade these jobs. They can also work with their contractors, vendors, and suppliers to upgrade service jobs. Vendors, contractors, and suppliers can be reviewed and selected based on their implementation of such good jobs strategies. Anchor institutions can also work with private-sector partners, organizations like the Chamber of Commerce, and city leadership to identify and galvanize companies that employ the good jobs strategy and create networks to disseminate best practices and scale these efforts. During the mid-20th century, America turned around many of its manufacturing companies by forging networks of leading-edge companies to work with others to demonstrate the value of paying workers more and instituting best practices. The same can be done for service-based companies. And, as we will see, large-scale anchor institutions, like universities and medical centers that employ large numbers of service-class workers, can also play a key role in undertaking the good jobs strategy and upgrading service jobs.

RECOMMENDED ACTION

Philadelphia's anchor institutions must set a broad example by committing to a living wage and full benefits for all employees. The anchors should also lead in upgrading low-wage service jobs into family-supporting jobs. They can help upgrade the city's low-wage service jobs by forging networks of leading-edge service firms and organizations which can train and disseminate this good jobs strategy to smaller business and organizations across the city.

SPREAD PROSPERITY TO ALL PARTS OF THE CITY

Philadelphia's urban revitalization has been highly uneven, centered around small islands of innovation and economic opportunity in and around the urban center and knowledge institutions, while larger spans of the city remain mired in concentrated disadvantage. The highly uneven nature of the city is not a fluke of the local economy: it is hard-wired in the very structure of the knowledge economy. Unlike the old Fordist manufacturing economy, where factories and distribution networks could be widely dispersed, the driving force of the knowledge economy is the concentration and clustering of talent and economic assets.

Current piecemeal approaches to housing, economic, and community development are insufficient to address the depth of these socio-economic divides. Left unaddressed, these divides will eventually undermine the city's economy and may already be doing so. Generating more-inclusive prosperity will require developing new pathways and connective fiber to link disadvantaged neighborhoods to established clusters of economic opportunity. This city's anchors, which have been at the frontier of place-based policy and development in their own neighborhoods, can help to extend these strategies for neighborhood revitalization and place-based development to other less-advantaged parts of the city.

Here, the PAGE anchor collaborative has already begun to make a difference. It aims to leverage the collective spending power of the city's anchor institutions—valued at more $5 billion per year—to stimulate the local economy, particularly small businesses.[48] Over the past couple of decades, Philadelphia's anchor institutions have led in developing a workable model for upgrading and revitalizing the less-advantaged neighborhoods in which they are located. More than 25 years ago, the University of Pennsylvania's pioneering West Philly Initiatives established a multi-pronged approach to revitalizing a neighborhood that had suffered from disinvestment during the urban crisis of the 20th century, focusing on economic inclusion in the form of local and diverse hiring, construction contracting and procurement, public safety, housing and homeownership, retail corridor development, and public education. The creation of the University City District by the University of Pennsylvania, Drexel University, and other neighborhood institutions in 1997 demonstrated that major anchor institutions were committed to investing in their neighborhoods. Billions of dollars have been invested in commercial facilities, academic buildings, and public realm improvements.[49] These initiatives have been a key spur to the revitalization of this area of West Philadelphia. A 2015 study found that these initiatives had improved the neighborhood without gentrifying it—in other words, without pricing out vulnerable residents.[50]

These efforts are now taking an even more explicit focus on inclusive development.[51] Drexel University has launched an economic inclusion strategy as part of its core mission, creating university-wide policies for local hiring, local procurement, and local contracting for construction projects. This has involved the university rethinking its institutional boundaries, including finding new ways to make the campus physically more-inviting to neighbors, making it easier for neighbors to access resources like job training and educational opportunities, and helping small businesses navigate complex regulations. The university's Cradle to Career program has created a new neighborhood middle school and involves university students and faculty in mentorship and other programs to improve educational outcomes. Following the lead of the anchors on placemaking, the first phase of Brandywine's Schuylkill Yards project includes a new open space, Drexel Square, intended to invite the community into the new development.

Thomas Jefferson University has pioneered a series of initiatives aimed at improving neighborhood health outcomes. The Jefferson Latina Women's Clinic is a bilingual medical facility that focuses on culturally sensitive care. The Philadelphia Collaborative for Health Equity, founded by Jefferson's Dr. Jack Ludmir, seeks to research and correct health disparities across Philadelphia. The university's Health Science Pipeline Programs workgroup provides jobs and career pathways for members of disadvantaged and underserved communities.

Temple University is working to expand prosperity in North Philadelphia. Significant portions of the new Charles Library have opened to the public, as part of the university's effort to become a hub of community life. With support from the Lenfest Foundation, the university is starting work on the North Philadelphia Workforce Initiative, an analog to the successful West Philadelphia Skills Initiative. This effort is bringing on community partners, identifying key skill gaps, and planning skills training and job opportunities for vulnerable community members, including formerly incarcerated people.

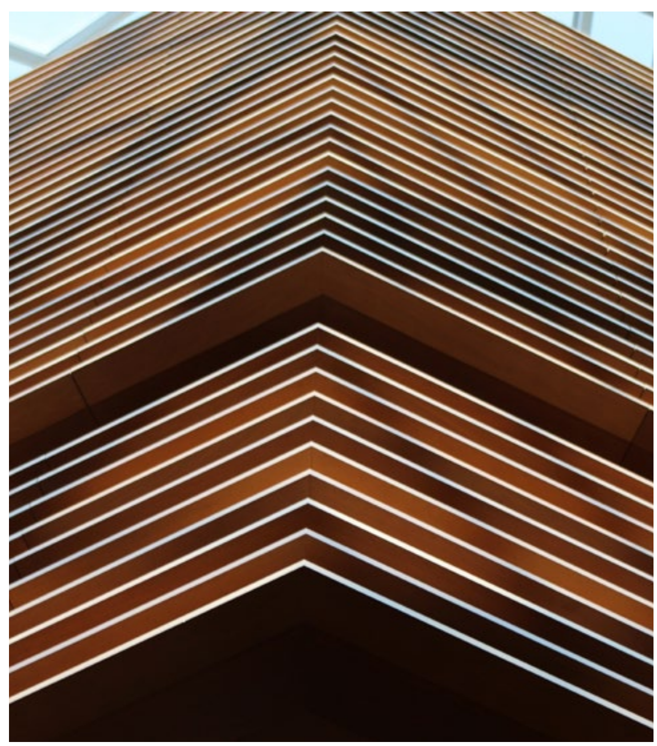
The challenge going forward is determining how to scale these efforts to include more neighborhoods across the entire city, especially those that lack significant anchor institutions. A connective strategy for these neighborhoods will require better access to areas of greater economic opportunity. Numerous studies have found a strong relationship between commute time, public transport access, and upward mobility.[52] As such, a concerted effort to connect local residents to jobs and economic opportunity is needed.

There is also a need for more direct and comprehensive place-based economic and community development strategies in these neighborhoods. A growing body of research indicates that investing in places, alongside investing in people, is required to lift up distressed communities. A recent study of place-based policy by Timothy Bartik of the Upjohn Institute for Employment Research suggests that this requires a concerted effort to connect disparate initiatives in business services, workforce development and job training, housing, and economic and community development.

Elements of such a place-based model for neighborhood revitalization can be, and are being, used to spur revitalization in Philadelphia's less-advantaged neighborhoods. The West Philadelphia Promise Zone may provide a useful model for such place-based community revitalization. As one of the original five Promise Zones designated by the Obama administration, its aim was to bring together a wide range of community partners and federal, state, and local initiatives in a comprehensive, all-out assault on persistent poverty. Of course, with the change in administration, the funding necessary for such a comprehensive, long-run approach to neighborhood-based economic and community development has not materialized. But perhaps the city's anchor institutions—in cooperation with local government, the private sector, and local and national philanthropy—can work to reactivate this much-needed effort to revitalize this neighborhood, providing a model that can be replicated in other neighborhoods. Connecting and reviving distressed neighborhoods cannot be piecemealed out; it requires a full-press effort that is persistent over time.[53]

RECOMMENDED ACTION

The city's anchor institutions must put inclusive prosperity at the core of their missions. Spreading out from the revitalization efforts taking place in their immediate neighborhoods, the city's anchors, the private sector, and government organizations must work together to better connect disadvantaged neighborhoods to areas of economic opportunity and to extend broad and comprehensive place-based development strategies to these neighborhoods. In doing so, the city's anchors can chart a new path for both the city and the nation in crafting a more-complete agenda for inclusive urban prosperity.



A PERSISTENT, INTENTIONAL, AND COLLABORATIVE EFFORT

Moving from the current reality of islands of economic advantage and opportunity to a more broadly shared inclusive prosperity will not be easy, and it will take time. In our interviews and conversations, we have consistently heard that Philadelphia lacks the large corporate headquarters and large philanthropies that have helped to lead the charge toward more-inclusive prosperity in other cities across the country. In Philadelphia, this role has been taken on by the city's anchor institutions. Meeting the challenge of inclusive prosperity will require their persistent, intentional, and collaborative effort. This can draw off the successes of the past, for it is precisely the kind of intentional and cooperative effort that spurred the city's revival in the first place—a revival that took the better part of two decades. Creating a more-shared and inclusive prosperity will take similar hard work, persistent effort, and sustained collaboration over a similar period of time.

Philadelphia's current divides and its new urban crisis will not solve themselves. Without decisive, collaborative, and persistent action from the city's leading anchor institutions, in cooperation with city government, the private sector, labor, and a range of neighborhood and community stakeholders, the city's new urban crisis will only worsen. But if the city acts now, with a strong sense of purpose, it has a chance to prevent the extreme new urban crisis that has taken root in other cities. Ensuring shared and inclusive prosperity for all Philadelphia neighborhoods and all Philadelphians is the next great challenge facing the city.

Just as Philadelphia was a model for the urban revitalization that came in the wake of the old urban crisis, it now has the opportunity to be a national and global model for a more-inclusive prosperity that proactively tackles the challenges of the new urban crisis.

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A fellowship project like this one reflects the contributions of many talented people. A special debt of gratitude is owed to world-class city builder and dear colleague John Fry, President of Drexel University. This fellowship was his brainchild. I also want to express my personal thanks to Stephen Klasko, President and CEO, and Mark Tykocinski, Provost, of Thomas Jefferson University and Stephen Zarrilli President and CEO, of the University City Science Center. This fellowship would not be possible without the generous financial support of these three institutions. This project was inspired by the late Jeremy Nowak, whose wisdom and collegiality helped to structure the project's issues and focus.

I am fortunate to have an incredible team that supports my work. Steven Pedigo managed the overall direction of the project, supervising both the quantitative and qualitative dimensions of the research. Todd Gabe contributed much of the data and analysis. Jacob Morgan produced the maps. Benjamin Schneider assisted with writing and editing. Rana Florida contributed to project management. And Reham Alexander deftly handled all of the project's logistics.

In Philadelphia, the project benefitted immensely from the vision and dedication of its Steering Committee, composed of Matt Dane Baker, Saul Behar, Tracy Brala, Alan Greenberger, Bruce Katz, Lucy Kerman, Cecilia McCormick, and Harris Steinberg. Michael Greenle facilitated the overall coordination of this project. Moira Pannepacker and Ryan Debold provided great help in supporting aspects of this fellowship and related events. I also want to personally thank the many people who participated in the interviews, conversations, roundtable discussions, and public events that contributed to this project.

APPENDIX A: RESEARCH DESIGN, DATA AND METHODOLOGY

This study is based on a combination of quantitative and qualitative research.

Our quantitative research compares the city of Philadelphia to the 50 largest principle cities in the U.S. We compare Philadelphia to its peer cities across numerous demographic and economic indicators, such as population, jobs, talent, income, education, class, race, housing, inequality, and segregation. We examine many of these indicators visually, by mapping them across the city's many neighborhoods and census tracts. This illuminates the nature and extent of spatial inequality across the city.

Definitions of the three main occupational classes—the working, service, and creative classes—come from *The Rise of the Creative Class* (Florida, 2002). The creative class is defined by occupations that "create meaningful new forms" and therefore work primarily using their minds. It includes two general categories: the "super-creative core" of scientists, engineers, professors, artists, and designers, and "creative professionals" who work in fields like business, management, law, and healthcare.

Members of the working class do more intense physical labor, in fields like manufacturing, transportation, and logistics. Members of the service class do routine service work, in fields such as food service, homecare, retail, and customer service.[54]

Our data are from the U.S. Census American Community Survey. During the course of this project, we experienced an issue with data. Our original research was based mainly on the five-year estimates for the period 2012-2017, the most recent period for which data are available. But significant errors were discovered in the census data for 2017. So, we instead use the 5-year estimates for the period 2011-2016, which are more accurate.

Our qualitative research is based on detailed interviews, roundtables, and discussions with numerous Philadelphia leaders, including representatives from Drexel University, Thomas Jefferson University, the University City Science Center, and other key anchor institutions; business and labor leaders; members of city government; and community activists.

In addition, we analyzed a wide body of academic and city hall reports on the city's transformation, including "Growing With Equity: Philadelphia's Vision for Inclusive Growth," by the city of Philadelphia, "Economic Growth and Mobility Project," by the Federal Reserve Bank of Philadelphia, and "Connect to Compete: How the University City-Center City innovation district can help Philadelphia excel globally and serve locally," by Bruce Katz and his colleagues at the Brookings Institution. All sources are listed in the references.

APPENDIX B: STEERING COMMITTEE AND ROUND-TABLE DISCUSSION PARTICIPANTS

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