



# **The Transformation Alliance**

## **Strategic Plan | 2016-2018**

### **April 2015**

*Strengthening communities through transit*

40 Courtland Street, NE, Atlanta, GA 30303

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## ***Introduction***

Metro Atlanta's car-centric transportation model limits our economic prosperity and regional competitiveness, and those limitations are experienced more deeply by lower income households and communities. Atlanta's history has been a "tale of two cities", with investment and growth favoring some communities, while poverty and disinvestment as concentrated in others. Recent waves of investment are perpetuating this displacement pattern.

The TransFormation Alliance (the Alliance) is a collaboration among community advocates, policy experts, transit providers, non-profit and for-profit developers and government agencies. The Alliance promotes community building practices that link communities around transit with opportunities to thrive. Our work will foster a more prosperous, equitable and competitive metro Atlanta.

The Alliance recognizes that solving problems of regional scale requires unprecedented cooperation. This partnership is committed to forging innovative solutions that address issues of economic vitality, job creation, equity and opportunity within a framework of well-planned equitable transit-oriented development (ETOD). Our organizations have come together to leverage our individual resources and networks to make real progress for all residents of metro Atlanta.

## ***Recent Key Accomplishments***

In 2014, with the support of the Ford Foundation, the Alliance focused on:

1. Building the Alliance through a strategic planning process: expanding the core membership and forming four working committees in addition to the Executive Committee
2. Identifying emerging TOD projects in which short-term equitable outcomes could be achieved, while more long-range interventions and financing tools are designed
3. Working to advance mandatory inclusionary zoning as a tool for achieving affordable housing goals
4. Working in targeted communities to listen and learn about residents' concerns and needs, which informs how ETOD developments should proceed
5. Continuing to develop an equity evaluation tool which will assess both the physical structure and equity components of TOD projects
6. Building our brand and messaging
7. Researching, educating and exploring financial tools that leverage funds to develop ETOD
8. Convening and partnering with strategic partners on issues pertinent to ETOD

The Alliance implements efforts through five working committees, each led by an Alliance member and composed of external experts. The five committees are: Executive, Policy, Housing and Finance, Community Engagement and Research and Projects.

## ***Opportunities and Challenges***

Currently, there are signs that ETOD has its best chance to begin redressing some of our region's systemic inequities. MARTA has become more aggressive in its TOD planning, releasing requests for proposals (RFPs) and developing TOD guidelines. The Atlanta Beltline is focusing on achieving its

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affordable housing goals within its 22 mile loop. The market is clearly indicating a preference for TOD – hundreds of new multifamily units are now under construction to absorb young professionals and retirees looking to live in walkable and connected neighborhoods. However, none of these units include affordable options.

Juxtaposed against this market pace are historically disinvested communities like Vine City/English Avenue, which are urgently fighting to make their voices heard in the construction of a new football stadium. The presence of two MARTA stations in those communities makes them desirable for servicing the stadium audiences, but how can they also become amenities for the residents and catalysts for the market development those families desperately need? As development hurdles forward, these concerns can be seen in communities throughout our region.

## ***Vision, Mission, and Values***

The Alliance believes metro Atlanta can prosper if all residents have access to jobs, housing choice, transportation, food and services that make communities healthy. Strengthening communities through transit requires engaging communities, business, government, and institutions like schools, universities and social sector organizations in the decision-making process.

### **Vision**

ETOD, combining people and place making, integrated into transit, is a driver of economic prosperity in metro Atlanta, creating thriving and inclusive communities.

### **Mission**

The TransFormation Alliance facilitates collaboration in support of ETOD in metro Atlanta through outreach, education, technical assistance and advocacy.

## ***Achieving Our Vision and Mission***

### **Convening**

The Alliance brings together a unique set of partners to leverage skills, perspectives and networks. We are committed to partnering with others working toward similar goals and facilitating various conversations to work toward implementing ETOD.

### **Educating**

Through authentic community engagement, we educate and engage communities where development opportunities are happening, or will happen, to ensure their voices are included in the decision-making process. We are developing a leadership academy for community, business and government leaders and provide research and technical assistance to developers, decision makers and communities.

### **Advocating**

We are working with Invest Atlanta and the City of Atlanta to articulate and pass a mandatory inclusionary housing policy for Atlanta and core counties, but we also recognize that infrastructure policy, state transit funding and unlocking new and existing sources of dollars for affordable housing are all necessary to creating an environment where equity can thrive.

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### **Financing Solutions/Technical Assistance**

The Alliance's work in finance has already produced results in the form of deeper relationships with DCA's Housing Staff, the inclusion of ETOD friendly points in the LIHTC qualified allocation process, and a seat at the table in thinking about how to use sources of new dollars (unrestricted TCAP and National Housing Trust Fund when it's released) for equitable affordable housing outcomes.

In addition to policy work, the Alliance is pursuing development opportunities that will model the process of ETOD, including innovative design and authentic community outreach. We also connect developers with funding to implement equity in TOD sites on land owned by MARTA near its stations.

In addition to the tangible outcomes of our work, we are also focused on the following strategic priorities:

#### **Development Strategy**

The Alliance finds creative and effective ways to sustain its efforts. Currently, individual organizations participate given their own capacity and resources which has stretched the Alliance's influence past its limited funding. Our goal in the next 1-3 years is to explore philanthropic and other options to generate a diversified and stable source of funding from regional and national sources committed to this work.

#### **Communications Strategy**

With the support of the global PR firm Porter-Novelli, we have streamlined our messaging and strengthened the tools we use to communicate internally and externally. We believe our work is essential to the prosperity and sustainability of our region, but it won't succeed unless we create open lines of communication between our members and the communities we serve. As part of our commitment to educating a broad range of stakeholders about the importance of ETOD, and for the growth and sustainability of our effort, we continue reaching out to partners and collaborating with them in ways that are meaningful to them.

#### **Internal/Structural Strategy**

We seek to balance accountability and momentum, while retaining a commitment to transparency and support. We believe that working collaboratively is the best path for achieving the change we envision for the metro Atlanta. Therefore, we pay careful attention to how we are structured, how we measure and assess our work and how to keep our members engaged.

### **Governance and Management**

The Alliance seeks to create the most efficient structure that takes into account each organization's unique contribution, balanced with their capacity to contribute. It is critical to ensure that our work isn't simply divided into pieces, but that the roles and leadership that each organization or group of organizations provide achieves our outcomes and leverages a result that is "greater than the sum of its parts". Each organization is a part of our membership structure because of their contribution and the constituency they represent, and each organization plays a role in ensuring the success of our work.

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We use the AD(A)PT Collaborative Structure to design and assess our internal dynamics. This structure includes four components: accountability, decision making, partnerships and trust and team building.

## ***Accountability and Decision Making***

The Alliance is structured to ensure accountability across all member organizations and partners. We have an Executive Committee, made up of the chairs of each working committee, that both centralizes and distributes decision making and fundraising responsibilities for core functions. The Executive Committee is responsible for ensuring that the collaborative efforts of the Alliance move forward effectively, including:

- making operational decisions;
- tracking fundraising and fund allocation;
- structuring work plans and agreements with working groups; and
- commissioning consultants and contractors.

The Alliance's four working committees include core members and partners or stakeholders who bring critical expertise and interest, but are not formal members. These working committees are responsible for:

- articulating strategic goals;
- developing work plans and budgets that implement the Alliance's goals and commitments; and
- executing projects and meetings, and other identified deliverables.

The work plans and budgets are reviewed and approved by the Executive Committee, and ratified by the core Alliance membership.

The Executive Committee—along with the full participation of core members—is responsible for a consistent collaborative culture and for addressing and resolving any conflicts that exist or may arise. When the Alliance must make a decision on a difficult or potentially divisive issue, that decision will be made by the Executive Committee with input from the core membership, using the tools of consensus and a voting process, if necessary. Consensus is defined by a process where groups come to a decision by assessing where members are along a 'spectrum of agreement.' While there may not be unanimity in every decision, a decision will move forward unless there is a clear and stated objection to a proposal.

## ***Partnership Criteria***

The relationship of the members of the Alliance is governed by a Memorandum of Understanding (MOU) which will be reviewed and updated annually. To date, all of the core members of the Alliance have signed an MOU which outlines our shared values around ETOD and working in collaboration with other organizations and the specific organizations commitment and responsibilities. Those organizations fulfilling particular elements of the Alliance's work plan can clearly communicate both their own organizational mission and may use the Alliance's name to indicate that they are part of a broader collective working for ETOD in the region.

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At the same time, organizations not currently involved in the core membership of the Alliance have a vital role to play in a collaborative approach to our community and regional future. To refine our agreements around the work expected of different levels of partnership, and the responsibilities and advantages of serving in key positions, the Alliance has been refining our MOUs to better capture the specific commitments of each partner. We want our participating organizations to feel they are able to completely fulfill their commitments.

Beyond participating in one of our working committees, partners may be invited to attend events, inform our strategies and work plan, work on specific projects with one or more member organizations, or engage in outreach and education on behalf of the Alliance's work. We welcome partnerships of all kinds and strive to model the following:

- *Clarity of purpose*—identifying who is involved, for what purpose and for what duration
- *Mutual benefit*—outlining what both the partner and the Alliance gain
- *Understanding of role*—as an independent organization and as part of the Alliance
- *Transparent communication*—defining how internal communications work and how to talk about the Alliance, its efforts and the specific partner role
- *Respect for capacity*—realistic assessments and expectations of what partners can provide and what support is available from the Alliance

To ensure that each partner continues to participate at the level that best suits their organization's goals and capacities, the Alliance will conduct a regular interview process to confirm and refine expectations and commitments.

## ***Trust and Team Building***

As a collaborative effort, the most important resources the Alliance possesses are trust and the relationships that have been built among its constituent organizations and partners. Whether as part of the Executive Committee, core membership or partner, every relationship is crucial in achieving our goals. We come together regularly for monthly meetings and working committee planning sessions not only to discuss developments in the region and focus on Alliance projects, but to explore ways we can work together more successfully. The Alliance has a clear structure that supports ongoing relationship-building and the Executive Committee and core membership is committed to adopting guidelines that resolve any conflicts which may arise. Beyond the individual interests of any single organization, all core Alliance members believe that we will only succeed in transforming development practices in the region and creating more opportunity across our communities by working together.

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## Measuring Our Progress

### Strategic Priorities and Associated Metrics (2016-2018)

- 1. Promote policies that accomplish ETOD, including affordable housing, transit funding, job access and other community strategies.**
  - a. Inclusionary housing policy will require all publicly incentivized projects in City of Atlanta and Fulton Co. to include affordable housing
  - b. Conduct research and outreach to recommendations and potential strategies for the use of AHA's PBRA contracts/vouchers in ETOD
  - c. Support ETOD policy conversations through convenings on transit funding, job dispersal and other timely issues
  - d. Identify strategic outreach and value-added responses to new opportunities, i.e. Clayton County MARTA expansion
- 2. Cultivate citizen and elected-official support for ETOD.**
  - a. Fully developed ETOD Academy which has graduated 2 cohorts
  - b. Retain services of skilled community organizing consultant to activate ETOD Academy graduates as supporters and advocates
  - c. Education of elected officials on ETOD issues through the Atlanta Regional Commission's Community Planning Academy
- 3. Facilitate ETOD deals that check all the boxes: affordable housing, good jobs, connectivity, good schools, quality of life, access to healthy foods and authentic community engagement.**
  - a. Identify properties and development partners/capital stack(s) and facilitate acquisition strategies for both distressed and high income areas
  - b. At minimum, one ETOD demonstration project will be in development, with a goal of including permanent affordable housing
  - c. Equity Evaluator will be used in MARTA Request For Proposal (RFP) evaluation process to determine the level of equity a proposed development adds to the surrounding community, as determined by the needs of the specific station
  - d. Continue to engage and influence Georgia Department of Community Affairs process and use of flexible funds
- 4. Expanding membership at all tiers**
  - a. Cultivate relationships with 2-3 large employers with an ETOD alignment to support TFA
  - b. Foster more in-depth relationships with public partners, including the Atlanta Beltline, Invest Atlanta and others to support them in accomplishing their equitable development goals
  - c. Cultivate relationships with 1-2 key private sector representatives, i.e. Metro Chamber of Commerce, Central Atlanta Progress and/or Community Improvement Districts
- 5. Implementation of station-based community engagement strategies**
  - a. A minimum of 3 MARTA stations will receive strategic community engagement, including interactive visioning and educational sessions
  - b. Work with the Alliance's partners to develop appropriate uses, including arts outreach and other alternative methods of community engagement.
- 6. Diversify the Alliance's funding with a goal of leveraging a total of \$200,000 from an expanded base of supporters**

## Strategic Road Map and 2015-2016 Timeline/Workplan

[Drafts below—final road map and timeline to be inserted as appendices or as either inside cover on a printed document and/or separate pages (so that changes can be made to workplan/timeline as needed)]

