



COMPETITIVE ASSESSMENT



Momentum 2027

Topeka-Shawnee County, KS | December, 2021



TABLE OF CONTENTS

INTRODUCTION.....	1
PROJECT OVERVIEW	3
EXECUTIVE SUMMARY	5
STORY 1: Progress and momentum but much more left to do.....	9
STORY 2: Talent shortages threaten to undermine economic vitality	17
STORY 3: Core strengths and new assets promise improved economic performance.....	35
STORY 4: The path to becoming a first-choice destination.....	47
NEXT STEPS	62
APPENDIX A: MOMENTUM 2022 IMPLEMENTATION EVALUATION	63

INTRODUCTION

As the five-year Momentum 2022 cycle winds down, it is instructive to look back at where the initiative began and how far it has come. Faced with a population that had soured on Topeka-Shawnee County's future prospects and multiple growth-driven organizations looking for ways to work better together, a visionary plan was developed and a new organization was created to lead its implementation. Allowing there is still much work to be done, local leaders feel it is important to acknowledge the many positives that have emerged from Momentum 2022 and the transformative role played by the Greater Topeka Partnership (GTP).

However, the global pandemic that paused Momentum 2022 activities in favor of sustaining local businesses also accelerated many community processes that were already underway. Probably no category has seen greater disruption than talent. For Topeka-Shawnee County, the changes are a double-edged sword – a benefit because more people with “remote-friendly” jobs have greater freedom to choose their place of residence, but a challenge because talent scarcity for many key positions has been intensified.

Time will tell whether these talent-related pressures are short-term pandemic-related blips or if heightened competition for higher skilled workers is the new normal. Either way, it is imperative that Topeka-Shawnee County continues to pursue its strategic goals with a sense of purposeful urgency.

Momentum 2027 offers the chance to think bigger and aim higher, to double-down on ensuring that diverse voices are heard, acknowledged, and supported. Topeka-Shawnee County stakeholders are more bullish on their community than they have been for years and eager to move Momentum 2027 forward aggressively. This process will establish priorities and confirm the most effective ways to advance them. Success will require greater levels of collaboration and coordination to ensure the gains of the past five years are a springboard to even loftier heights to come.

ABOUT BROAD RIPPLE STRATEGIES

Broad Ripple Strategies has been selected as Topeka-Shawnee County's partner to develop Momentum 2027. BRS represents nearly 30 years of experience crafting community, workforce, and economic development strategies that build consensus, drive investment, and get results. Our team worked with Topeka-Shawnee County on the creation of Momentum 2022 and is excited to be back in the community to plan the next five-year cycle of this transformative initiative.

ABOUT ARROWHEAD CONSULTING

Joining BRS on the Momentum 2027 consultant team, Arrowhead is a management consulting firm based in Oklahoma with a mission to guide companies through the process of strategic change. Arrowhead leverages the business case for diversity, equity, and inclusion (DEI) to enhance the competitive advantage of organizations and communities. Arrowhead has developed a framework for assessing DEI organization health, professional development along with a training suite of presentations, executive coaching, and consulting on creating a robust strategic plan utilizing the DEI lens.

PROJECT OVERVIEW

Momentum 2027 will be developed through a four-phase process that began in August 2021 and will conclude in March 2022. It is led by a dynamic Steering Committee of key community leaders. This group is tasked with sharing their perspectives and insights, reviewing research and input findings, considering the guidance the BRS team provides, and making key decisions about the priorities and strategies that will define the new strategy. The leaders selected for the Steering Committee reflect the diverse opinions, perspectives, and backgrounds of the Topeka-Shawnee County community and its residents.

Working with BRS and GTP, Arrowhead Consulting developed internal recommendations for how DEI should be incorporated into the Momentum 2027 process. These included a definition of terms to establish “shared language” for DEI, ensuring that the stakeholder engagement process was inclusive and diverse, and a brief discussion of the “business case” for DEI at the community level.

Phase 1: Stakeholder Engagement

Input from the people who live and work in a community is an essential component of a strategic planning process. The BRS team worked with the Greater Topeka Partnership to develop a robust, equitable engagement process consisting of interviews, focus groups, and an online survey that garnered 1,011 responses at the time of this report’s writing (this number has since increased to 1,564 and full results will be included with the final copy of this report).

Phase 2: Competitive Assessment and Implementation Evaluation

This phase provides key insights into Topeka-Shawnee County’s competitive position and helps the Steering Committee make informed decisions on the key issues and opportunities that will shape Momentum 2027. The Competitive Assessment synthesizes existing research, quantitative data, and qualitative input to evaluate Topeka-Shawnee County as a place to live, work, and do business. It is complemented by a concise Implementation Evaluation that identifies key “lessons learned” from the activation of Momentum 2022.

Phase 3: Momentum 2027

This phase will result in the development of a next-level strategic plan for Topeka-Shawnee County that blends ongoing initiatives that warrant continuation with new priority programs and investment to establish the community’s strategic priorities for the next five years. Creation of the plan will occur in three

phases: a high-level outline or framework of goals and objectives; a draft strategy; and final plan. Each phase will incorporate review and comment from the Steering Committee, whose work will be completed with the final approval of the Momentum 2027 strategy.

Phase 4: Implementation Guidelines

While Momentum 2027 will determine “what” Topeka-Shawnee County will do strategically for the next five years, the Implementation Guidelines will prescribe “how” that will be accomplished. It will analyze and establish implementation costs and resources, lead and support entities for priority strategies, launch dates and project phasing, and performance measures to track progress towards goal attainment. The Guidelines be developed in consultation with the Greater Topeka Partnership and other partners who will play a direct role in activating the strategy.

Methodology

Building on existing research and qualitative input, BRS evaluated a wide range of economic, socioeconomic, demographic, and quality of life indicators from various public and proprietary sources. As was the case for Momentum 2022, Topeka-Shawnee County was used as the primary research geography.

To provide necessary context to the trends and issues discussed, Topeka-Shawnee County’s performance was analyzed relative to state and national trends as well as three communities with which it competes for jobs and talent selected in consultation with Greater Topeka Partnership staff. They are **Minnehaha County, SD (Sioux Falls), Polk County, IA (Des Moines), and Sangamon County, IL (Springfield)**. Although these are the same comparison areas as Momentum 2022, after assessing the full range of potential alternatives, BRS and GTP determined they remain the most appropriate Topeka-Shawnee County benchmarks.

In this report, Topeka-Shawnee County trends and competitive issues are presented in a narrative format highlighting key stories and findings that convey the community’s current competitive challenges and opportunities.

EXECUTIVE SUMMARY

This Competitive Assessment presents narratives that tell a story of Topeka-Shawnee County's recent economic and demographic trends, current competitive issues, and potential opportunities to continue recent momentum into the next five-year strategic plan, Momentum 2027.

Story 1: Progress and momentum but much more left to do

The four-plus years since the launch of Momentum 2022 have seen Topeka-Shawnee County improve its performance on many key indicators. The general sentiment among most stakeholders is that the community has momentum and is poised to continue making progress towards becoming a more competitive destination for jobs and talent. While it is understandable that some volunteer Momentum 2022 leaders are frustrated that the full extent of the strategy's impact is not understood by the general public, BRS' principals have rarely seen an initiative become part of public's consciousness so quickly. Others – including representatives of minority groups – feel that progress has not been felt equally among all county constituencies.

- Residents are far more hopeful about Topeka-Shawnee County's future than five years ago when Momentum 2022 was developed. New projects and programs spurred by the strategy's implementation and the belief that formerly siloed economic development entities are finally pursuing a shared vision under the umbrella of the Greater Topeka Partnership were cited as driving factors.
- A number of volunteer leaders engaged with Momentum 2022 implementation expressed frustration that "average citizens" are not fully aware of the specific progress that has been made since the strategy's launch. Nevertheless, BRS has rarely seen a strategic process embedded in the public mindset as quickly and thoroughly as Momentum 2022 since its launch.
- Demographic trend data and feedback from representatives of minority communities highlighted that not all Topeka-Shawnee County residents feel their fortunes have improved in the last five years. In some cases, however, data show Topeka-Shawnee County minority populations have fared better than constituencies of color in this report's benchmark counties. Sentiments in recent years may have also been influenced by national conversations around race and equity.

Story 2: Talent shortages threaten to undermine economic vitality

The Covid-19 pandemic accelerated key trends that have caused crisis-level challenges for employers across the nation looking to hire qualified talent. The situation is more acute in Topeka-Shawnee County because of years of flat population growth and slowing in-migration. Employers of all sizes and industries reported significant challenges finding the workers they need to sustain and grow their businesses. The cradle-to-career pipeline in the county's education and training institutions – supported by key community partners – has the potential to ease the region's talent issues, but challenges persist. Workforce availability is also constrained by key mitigating factors like housing, childcare, and transportation.

- As Topeka-Shawnee County's talent supply constricts, continued slow population growth, negative domestic migration trends, unfavorable age dynamics, and lower comparative educational attainment rates have complicated employers' efforts to find the talent they need to sustain and grow their businesses, especially in the most in-demand occupations.
- The cradle-to-career training pipeline in Topeka-Shawnee County offers many advantages to local businesses by way of improving public school performance, productive higher education institutions, and effective career-exploration programs for key employment sectors, but capacity constraints and continuing challenges to better coordinate and connect talent development partners hamper efforts to improve student outcomes and address talent-supply shortages.
- Employers of all sizes in Topeka-Shawnee County struggle to attract talent to the region, with large corporations increasingly looking out of market to find qualified workers and accepting – or promoting – opportunities for specialized, higher-wage talent to commute from Lawrence and Kansas City.
- Topeka-Shawnee County housing remains affordable, but lack of product across different styles and price ranges continues to hamper talent's ability to find the housing they need, while limited availability of affordable childcare and inconsistent broadband internet coverage further restricts workers' ability to access education and employment.

Story 3: Core strengths and new assets promise improved economic performance

Coordinated and targeted efforts to sustain local businesses through the pandemic brought Topeka-Shawnee County together to support the economy and protect public health. Recovery efforts created a groundswell of goodwill that set the stage for a recovering job market. A strong corporate base in health

care, financial services, and production offers hope that sluggish economic growth over the past decade can rebound in the years to come, complemented by dynamic new research and innovation capacity in animal health technologies.

- The Covid-19 pandemic paused Momentum 2022 implementation activities but provided an opportunity for local partners and the community to come together and build goodwill around economic recovery efforts that saved jobs and safeguarded public health.
- Data show that Topeka-Shawnee County's economic performance and worker productivity lagged behind peers in the last decade, with job losses accelerating in the most recent five-year period.
- Topeka-Shawnee County's strong economic base in stable, growing, well-paying sectors and its impressive array of major headquarters firms provide optimism that these assets can drive improved economic performance.
- The successful attraction of a top Silicon Valley accelerator and a corresponding effort to develop a Downtown Topeka innovation district offer the potential to transform the region's economy and supercharge its entrepreneurial ecosystem.

Story 4: The path to becoming a first-choice destination

Momentum 2022 served as a wake-up call that more urgency is needed to retain and attract the talent needed to support local businesses. Topeka-Shawnee County has made tremendous progress in the last five years towards becoming a place where talent wants to be, with an upscale new hotel, welcoming public plaza, revitalized entertainment districts, and corridor beautification efforts leading the way. However, the marathon is only in its first few miles; Momentum 2027 provides the opportunity to renew, expand, and launch new efforts to take Topeka-Shawnee County to the next level of competitiveness for quality of life and quality of place and to ensure more equitable outcomes for its citizens.

- Improvements in Topeka-Shawnee County have given long-time and returning residents hope for the future, although visions on how to achieve further progress differ and some local constituencies feel that recent community progress has not been fully equitable.
- Issues of limited nightlife vitality and high rates of crime, both real and perceived, continue to hamper Topeka-Shawnee County's ability to retain and attract talent.
- Key strengths like affordable living costs, family-friendly parks, and an improving downtown are important quality of life assets, while opportunities for continued downtown and neighborhood

revitalization and other potentially high-impact initiatives are cause for optimism that Topeka-Shawnee County can eventually become a first-choice destination for talent.

Momentum 2022 Implementation Evaluation

- In its first four-plus years of implementation, Momentum 2022 has been woven into the fabric of Topeka-Shawnee County, with public and private leaders and citizens alike speaking of the initiative as a bellwether for a new attitude towards change in the community. While this sentiment is not universally shared, the degree to which the process has entered the public consciousness is unique based on the experience of BRS' principals.
- A leader engaged in both Momentum 2022 development and implementation said the process represented a new level of cross-disciplinary engagement for Topeka-Shawnee County. "The most important convening was to get people to the table to talk about the future of Topeka. To work across boundaries and come together to address tough problems. We had some conversations we hadn't had before around economic development, diversity and inclusion, education, and healthcare."

Story 1: Progress and momentum but much more left to do

Chapters:

- I. Incomes and community sentiment have improved
- II. Some want the story of Topeka-Shawnee County's progress to be shared more forcefully
- III. Wealth and income gaps persist between constituency groups

I. Incomes and community sentiment have improved

The ultimate goal of a community and economic development strategy is to increase wealth and prosperity for local citizens. Wealth-creation helps move the needle on many other important local processes, including governments' capacity to provide public services, growth in retail, dining, and entertainment options, the ability of residents to afford quality housing and childcare, and many others.

Data show that **Topeka-Shawnee County has seen its average annual wage rise**. The average job in Shawnee County now pays \$49,977 per year, 18.4 percent more than the second quarter of 2016. While this increase tops Sangamon County's rate, it trails the other comparison areas. Shawnee County's average annual wage is also lower than every benchmark community.

AVERAGE ANNUAL WAGE, Q2 2016 TO Q2 2021

Geography	Q2 2021		% Chg., Q2 2016 - Q2 2021
	Annual	Hourly	
Shawnee County	\$49,977	\$24.03	18.4%
Minnehaha County	\$55,930	\$26.89	21.7%
Polk County	\$63,915	\$30.73	24.0%
Sangamon County	\$58,736	\$28.24	13.9%
Kansas	\$51,626	\$24.82	19.3%
United States	\$64,141	\$30.84	23.7%

Source: JobsEQ

Per capita incomes in the county are also increasing. The most recent available data showed that Shawnee County increased its per capita personal income (PCPI) by 15.7 percent from 2014 to 2019. This rate of increase trailed only Minnehaha County and the U.S. figures. However, Shawnee County's PCPI was still the lowest among all the comparison areas at \$47,991.

PER CAPITA PERSONAL INCOME, 2014 TO 2019

Geography	2014	2019	% Chg., 2014-2019
Shawnee County	\$41,482	\$47,991	15.7%
Minnehaha County	\$49,795	\$59,905	20.3%
Polk County	\$47,541	\$53,859	13.3%
Sangamon County	\$43,552	\$49,445	13.5%
Kansas	\$46,881	\$53,426	14.0%
United States	\$47,071	\$56,490	20.0%

Source: Bureau of Economic Analysis

Tracking similarly to personal income, **median household incomes in Shawnee County also increased**, though not as rapidly. The average Shawnee County household had an income of \$59,441 in 2019, the latest year data is available. An 11.1 percent increase from 2014 trailed the rates of all comparison areas except Sangamon County. As with personal incomes, Shawnee County's 2019 figure was lower than all the benchmark geographies.

Rising incomes have contributed to **notably lower poverty rates in Topeka-Shawnee County**. The county's total poverty rate is now lower than every comparison area except Minnehaha County, while its youth poverty rate (children under 17) trails only Minnehaha and Polk counties.

Overall and youth poverty in Topeka-Shawnee County also decreased faster than every benchmark geography, in some cases by almost double. This is an especially positive trend for the community.

POVERTY RATE, 2014 TO 2019

Geography	2019		% Pt. Chg., 2014-19	
	All Ages	Ages 0-17	All Ages	Ages 0-17
Shawnee County	9.8%	13.3%	-5.2%	-7.5%
Minnehaha County	8.7%	9.4%	-2.8%	-4.7%
Polk County	10.1%	11.9%	-3.0%	-5.7%
Sangemon County	12.2%	18.0%	-3.1%	-4.6%
Kansas	11.3%	14.3%	-2.2%	-3.3%
United States	12.3%	16.8%	-3.2%	-4.9%

Source: U.S. Census Bureau, Small Area Income and Poverty Estimates (SAIPE) program

Many factors, including increased wealth, poverty reduction, Momentum 2022 wins, and the creation of the Greater Topeka Partnership have **greatly improved community sentiment** about the trajectory and future prospects of the region.

It cannot be overstated the degree to which Topeka-Shawnee County stakeholders were down on the community's outlook in 2017 when Momentum 2022 was developed. In a statistic highlighted by multiple input participants, only 10.4 percent of respondents to the Momentum 2022 online survey in 2016 said it was "very likely" their children, once grown, would remain in the community versus 56.1 percent who considered it "not likely."

Looking back to that process, the Momentum 2022 Community Assessment reported that "a single issue (relates) to nearly every other aspect of Topeka-Shawnee County's competitiveness: the community's deep and persistent low morale. Virtually every person (interacted with) during this input process described a prevailing sense of negativity in the community. Stakeholders used terms such as 'pessimism' and 'self-doubt' to describe this issue."

When contrasted with the Momentum 2027 input process, **the renewed attitude of most community stakeholders is clearly evident**. Though input participants were realistic about the challenges Topeka-Shawnee County faces as it pursues its strategic vision, **there was an underlying optimism and general sentiment that the community was headed in the right direction**. As one leader commented, "The nice thing is the word 'momentum' actually fits. It's not just a slogan. That's what it feels like now. But there is a long way to go."

As will be discussed shortly, not all stakeholders shared this sentiment, but it was still **notable how dramatically the tone of stakeholder feedback improved in only five years.**

The Greater Topeka Partnership tracks community sentiment through a Net Promoter Score (NPS) survey distributed every two years to local stakeholders. Based on an index ranging from -100 (least likely to promote) to +100 (most likely to promote), the NPS measures the willingness of customers to recommend a product or experience to other people. In the case of Momentum 2022, that product is Topeka-Shawnee County.

In 2017 just after the strategy’s launch, the NPS was -50. **Just two years later, the score had increased to -26.** As could be expected, the NPS recorded during the height of the Covid-19 pandemic in 2020 lowered the score to -33, but it rebounded to -27 in 2021. Among Hispanic and Latino respondents, their NPS scores were higher than every other demographic group.

The Momentum 2027 online survey corroborated stakeholders’ improved sentiments about Topeka-Shawnee County’s desirability. Contrasted to the downbeat Momentum 2022 results, a higher percentage of respondents said they would recommend Greater Topeka to a friend or colleague than would not. The weighted average score was 6.2 out of 10.

SURVEY: HOW LIKELY IS IT THAT YOU WOULD RECOMMEND GREATER TOPEKA TO A FRIEND OR COLLEAGUE?

NOT AT ALL LIKELY 0	1	2	3	4	5	6	7	8	9	EXTREMELY LIKELY 10
5.0%	2.0%	2.7%	5.7%	6.5%	14.4%	10.9%	15.0%	16.1%	6.5%	15.1%

An initiative cited by multiple stakeholders as contributing to improved local attitudes and positivity was the creation of a new Topeka flag. Spurred by the efforts of Forge, Topeka’s young professionals group, the Topeka Flag Redesign Initiative was launched in July 2018 and captured the attention of the entire community. Over 300 designs were submitted to Forge, which narrowed down the options to three finalists for a public vote; the winning design received more than 70 percent of the nearly 4,000 votes cast.

II. Some want the story of Topeka-Shawnee County's progress to be shared more forcefully

The improving fortunes of Topeka-Shawnee County and the positive impact of the consolidation of multiple organizations into the Greater Topeka Partnership has made some leaders eager for these positive outcomes to be more widely discussed in the broader population. They feel there is a “general sense” that the community is getting better but that the average citizen does not understand the degree to which these changes have been fueled by Momentum 2022. The benefit, they believe, is that support for the strategy and its key implementation partners could be stronger if stakeholders knew their true impact. One business leader explained, “We’re seeing progress but how can we communicate it? We’re not getting the message across about all that’s happening. It’s frustrating, especially when you’re involved and know the details.”

It should be noted that BRS’ principals were struck by the degree Momentum 2022 had pervaded the public’s consciousness and was referenced by stakeholders across multiple constituencies. In the principals’ experience, it is rare for a strategic process to achieve this level of awareness, regardless the size of the community.

Beyond the impact of Momentum 2022, some business executives said they would like more support to tell Topeka-Shawnee County’s story to their current and prospective employees. One leader noted, “Internally, I could really use more help promoting Topeka. I couldn’t tell you what’s a nice restaurant area in the city. I need to sell an image of living and raising a family here.” Another said that “talking points” on how to promote the community would be helpful.

III. Wealth and income gaps persist between constituency groups

As is the case at the national level, **racial and ethnic minority groups in Topeka-Shawnee County face long-standing challenges to raise their income levels to those of majority populations.** As media pundits have noted, the Covid-19 pandemic exacerbated many of these challenges, including access to broadband internet, availability of affordable childcare and housing, reliance on public transportation, and other issues that caused greater hardship for minority workers than employees with greater flexibility to work from home.

Ongoing income and wealth inequities influenced how minority stakeholders perceived the efficacy of Momentum 2022 implementation to date. A focus group participant asked, “Are people feeling valued in the plan? We need a recognition that peoples’ basic needs are not being met and without

those you cannot have a vibrant community. These problems are not going to be fixed with nonprofits – citizens have something to do here – but leadership can set momentum for the value it sees in every citizen.”

Data from the U.S. Census Bureau’s American Community Survey¹ show that **Black and Hispanic residents in Shawnee County have significantly lower individual and household incomes** than their White counterparts.

On average, **Black and Hispanic Shawnee County residents earn annual incomes roughly half of the county’s White residents**. Only Minnehaha County features lower minority per capita incomes than Shawnee County. As can be seen in the following table, however, these percentages are roughly equivalent to most of the benchmark communities.

PER CAPITA INCOME BY RACE AND ETHNICITY, 2019

Race or Ethnicity	Shawnee County	Minnehaha County	Polk County	Sangamon County	Kansas	United States
Black or African American	\$18,943	\$14,903	\$18,532	\$18,099	\$22,258	\$23,383
Hispanic or Latino (of any race)	\$17,152	\$17,447	\$18,677	\$24,951	\$17,476	\$20,515
White, not Hispanic or Latino	\$35,237	\$34,940	\$39,891	\$39,081	\$35,422	\$40,405

Source: U.S. Census Bureau, American Community Survey

Household incomes reported by the U.S. Census Bureau follow similar patterns. Black and Hispanic households in Shawnee County have median incomes lower than White households, although the rate of disparity is lower than for individuals. Black Shawnee County households also earn higher incomes than all the comparison counties profiled in this report. Conversely, Hispanic households have lower annual incomes than all the profiled counties.

When broken down by components of income, Shawnee County’s wealth dynamics come into clearer focus. As calculated by the federal government, individuals can gain income in one of three ways, 1) through net earnings from employment, 2) through dividends, interest, and rent, typically from investments or ownership of income properties, and 3) through transfer payments like social insurance programs, welfare, and business subsidies. Community wealth building generally benefits most from

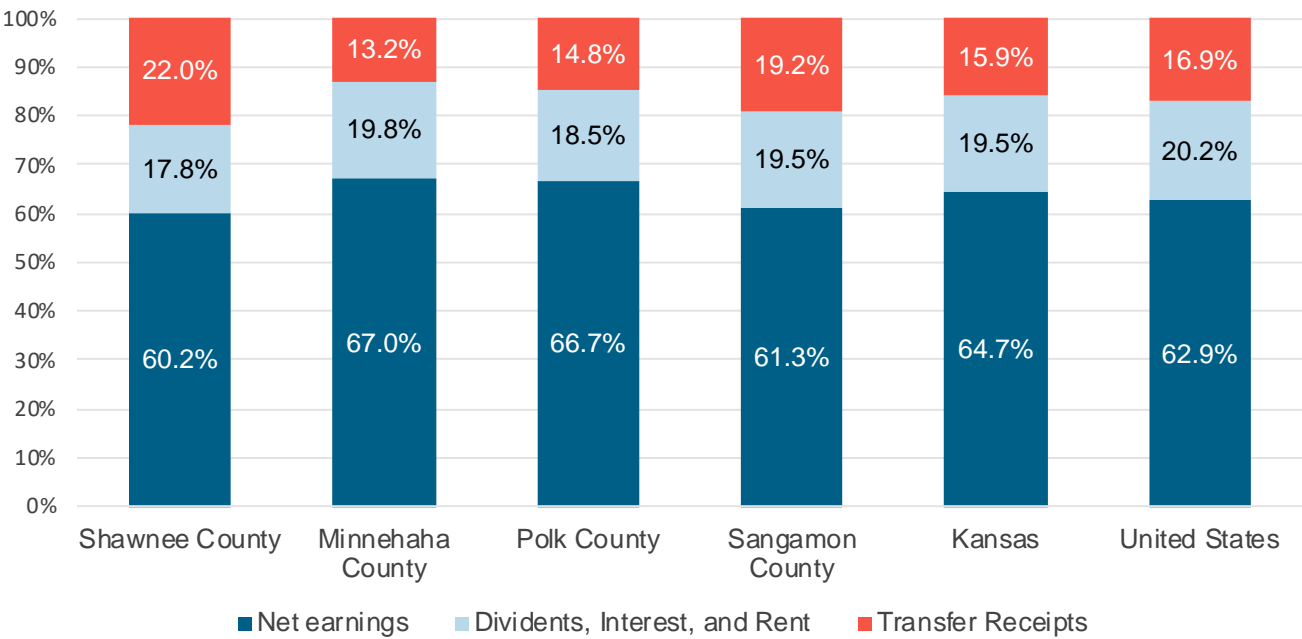
¹ Note: Allowing for different methodologies, U.S. Census ACS data vary from figures reported by the U.S. Bureau of Economic Analysis cited previously in this report. BEA income data is not broken out by race and ethnicity.

higher rates of net earnings because it translates into greater numbers of residents employed and contributing fully to the local economy.

Based on the most recently available data, **Shawnee County adults obtain higher percentages of their incomes from transfer receipts than every benchmark area.** Because most transfer payments are comprised by Medicare and Social Security, communities with older populations tend to have higher rates of transfer payment receipts. As will be seen later in this report, Shawnee and Sangamon counties have the highest percentage of their populations over age 65, which would explain their similarly high rates of transfer payment income.

Helping Shawnee County adults achieve self-sufficiency would have beneficial impacts on local economic activity.

COMPONENTS OF INCOME, 2019



Source: U.S. Bureau of Economic Analysis

As with individual and household incomes, wide disparities exist in the rates of Shawnee County’s minority populations in poverty compared to White residents. **Poverty rates of Black and Hispanic Shawnee County residents are nearly double (Hispanic) or over twice (Black) those of the White population.** However, as with total and youth rates, the percentages of Black residents in poverty are lower in Shawnee County than all comparison areas, while rates for Hispanic residents are lower than all but Sangamon County.

Increasingly, policy makers and advocates argue that federal poverty rates do not tell the full story of Americans' ability to stay above water financially. First created in 2004 by Dr. Amy K. Glasmeier and now maintained by the Massachusetts Institute of Technology with support from leading national organizations, the **Living Wage Calculator** argues that poverty thresholds do not fully account for living costs beyond a very basic food budget nor take into consideration costs like childcare and health care or geographic variations in household expenses.

The living wage model was created as an alternative measure of basic needs that takes a market-based approach to generate a cost-of-living estimate that exceeds the federal poverty thresholds. Shawnee County's average hourly rate of \$24.03 would only be a sufficient living wage for one adult with no children or two adults with one working and no children. **Only two parent families with both adults working can support all their children on the county's average wage.**

Story 2: Talent shortages threaten to undermine economic vitality

Chapters:

- I. Continuing challenges constrain local workforce capacity
- II. Significant workforce training assets, but coordination and capacity can be improved
- III. Topeka-Shawnee County continues to be a challenging talent recruitment market
- IV. Key barriers remain to fully engage Topeka-Shawnee County talent in the workforce

I. Continuing challenges constrain local workforce capacity

For months now, images on news sites have shown signs on fast-food restaurant windows and other service-oriented businesses apologizing for being closed but citing staffing shortages as the reason. Probing pieces in the New York Times and other publications seeking to explain current labor scarcity question whether there has been a “reckoning” among lower-paid workers to reconsider what they want from their jobs. Talk of a “Great Resignation” has become commonplace as workers quit their jobs at record rates.

Stories from employers, human resource officers, and other professionals in Topeka-Shawnee County paint a picture of a severely constrained labor market that is adversely affecting economic growth. Challenges to maintain and expand local companies begins and ends with discussions of talent. One employer said it was “almost impossible to find hourly workers.” There was consensus that entry-level positions were the hardest to fill, even after offering hiring bonuses and wage increases that many small businesses fear will be unsustainable. Local health care facilities have hundreds of open positions they are struggling to fill.

Human resources (HR) representatives for some of Topeka-Shawnee County’s largest employers spoke of retention challenges as in-demand talent leaves to secure higher wages or enhanced benefits at other firms. Smaller businesses again questioned how they can compete against larger companies that can afford to engage in bidding wars for new hires. Some employers have even seen remote workers poached by firms “on the coasts” offering, in some cases, \$8 more per hour for their labor. Firms in the

information and communications technology (ICT) space are fighting a national battle for talent that is scarce in nearly every employment center in the country.

The latest unemployment data support the argument that Topeka-Shawnee County is experiencing a tight labor market. The county's 3.9 percent unemployment rate in August 2021 was lower than every comparison area except for Minnehaha County and was well below the national figure of 5.3 percent.

Though labor shortages are a national issue, Topeka-Shawnee County faces greater talent availability challenges due to slower comparative population growth. **From 2010 to 2020, Shawnee County grew by only 975 people, an increase of 0.5 percent.** This compares with Midwest talent destinations like Polk and Minnehaha counties, which grew by 14.3 and 16.4 percent respectively. Shawnee County's growth over the last decade trailed every comparison area except Sangamon County.

TOTAL POPULATION, 2000 TO 2020

Geography	2000	2010	2020	% Chg., 2000-2010	% Chg., 2010-2020
Shawnee County	169,871	177,934	178,909	4.7%	0.5%
Minnehaha County	148,281	169,468	197,214	14.3%	16.4%
Polk County	374,601	430,640	492,401	15.0%	14.3%
Sangamon County	188,951	197,465	196,343	4.5%	-0.6%
Kansas	2,688,418	2,853,118	2,937,880	6.1%	3.0%
United States	281,421,906	308,745,538	331,449,281	9.7%	7.4%

Source: U.S. Census Bureau, Decennial Census

Racial and ethnic population trends in Topeka-Shawnee County largely mirror those at the state and national level. In 2020, Shawnee County was among the most diverse of all the comparison areas, with just over 70 percent of the population White alone, 7.6 percent Black, and 13.3 percent Hispanic or Latino. Shawnee County's Asian and Native Hawaiian and Other Pacific Islander cohorts grew fastest between 2010 and 2020, but from a much lower base. The community's Hispanic or Latino population increased by nearly 24 percent during the last decade, equivalent to Kansas and U.S. growth but well below the three benchmark counties.

Breaking down growth trends into their component parts sheds further light on Topeka-Shawnee County's population dynamics. Ideally, a community would like to see growth driven equally by natural change (more births than deaths) and positive in-migration from domestic and international destinations.

Data show that **Shawnee County's growth was solely attributable to natural change and net international migration**. The county saw 7,042 more residents leave than arrive from domestic markets from 2010 to 2019. This contrasts with strong net-positive flows of domestic migrants to Polk and Minnehaha counties.

COMPONENTS OF POPULATION CHANGE, 2010 TO 2019

Geography	Net Natural Change	Net Domestic Migration	Net International Migration	Total Net Migration
Shawnee County	4,455	-7,042	1,593	-5,449
Minnehaha County	14,225	3,162	6,279	9,441
Polk County	31,684	18,379	9,408	27,787
Sangamon County	3,359	-8,284	2,214	-6,070
Kansas	117,135	-107,795	51,058	-56,737

Source: U.S. Census Bureau Population Estimates

Analysis of annual Internal Revenue Service (IRS) tax exemption data reveals Shawnee County's top source and destination markets for domestic migrants. **Net domestic outflows for Shawnee County talent have been negative for the last five years**, ranging from a net loss of 819 migrants in 2015 to a deficit of 736 in 2019.

As public input participants said often, **Shawnee County is losing hundreds of residents every year to Lawrence (Douglas County) and Kansas City metro counties**. It should be noted, however, that this does not mean these migrants are no longer employed at Topeka area companies as they might still be commuting to Shawnee County for work.

Additional top outmigration markets for Shawnee County tax-filers include Dallas-Ft. Worth, Phoenix, and other counties in the Topeka metropolitan statistical area (MSA). Major source markets include the Manhattan, Kansas MSA and smaller micropolitan and rural counties across Kansas.

TOP 10 DESTINATION AND SOURCE COUNTIES, SHAWNEE COUNTY, 2015 TO 2019

Top Destinations	MSA	Exemptions	Top Sources	MSA	Exemptions
Johnson, KS	Kansas City	-1,245	Geary, KS	Manhattan	410
Jackson, MO	Kansas City	-509	Riley, KS	Manhattan	295
Douglas, KS	Lawrence	-497	Lyon, KS	Emporia*	232
Osage, KS	Topeka	-234	Saline, KS	Salina*	183
Wyandotte, KS	Kansas City	-227	Jackson, KS	Topeka	118
Tarrant, TX	Ft. Worth	-219	Atchison, KS	Atchison*	106
Dallas, TX	Dallas	-199	Wabaunsee, KS	Topeka	61
Jefferson, KS	Topeka	-181	Nemaha, KS	n/a	60
Clay, MO	Kansas City	-170	Brown, KS	n/a	46
Maricopa, AZ	Phoenix	-152	Reno, KS	Hutchinson*	44

Source: Internal Revenue Service

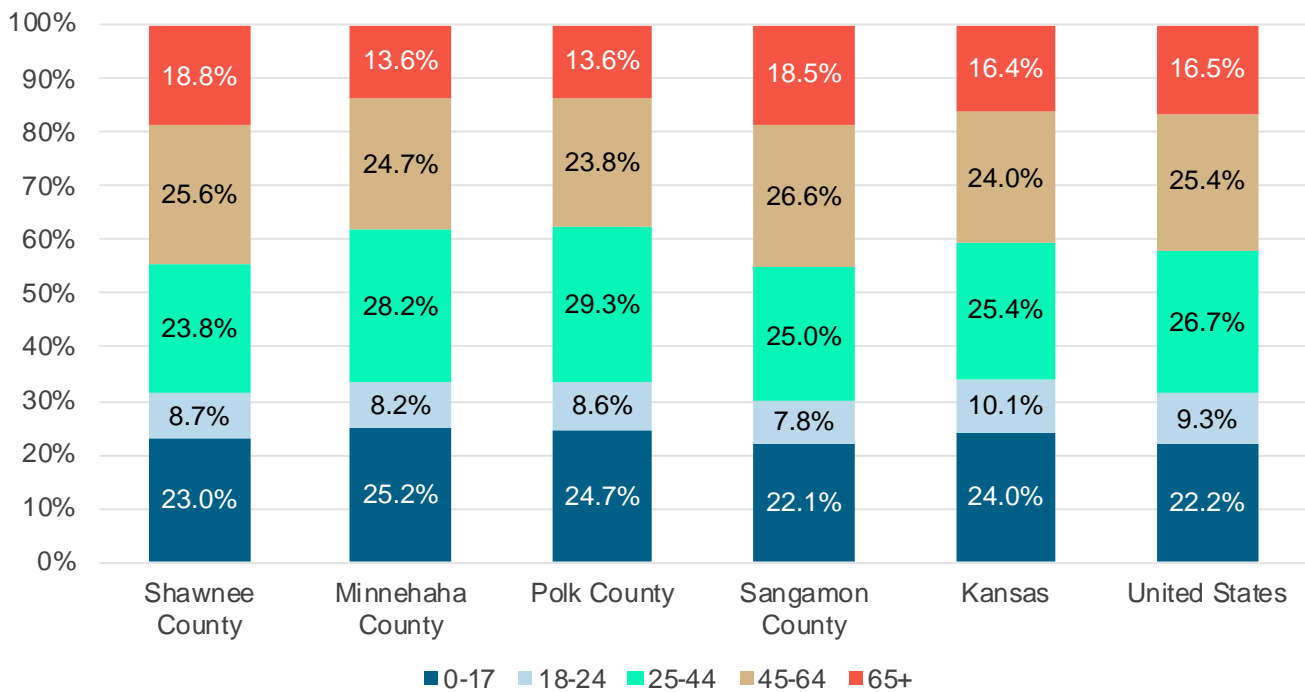
*Micropolitan Statistical Areas

Data from the U.S. Census Longitudinal Employer–Household Dynamics (LEHD) program corroborate stakeholder feedback about Shawnee County’s workforce commuting patterns. In 2018, **out of 94,485 workers employed in Shawnee County, 58,226 live and work in the county while 39,822 (38.4%) commute from elsewhere.** Nearly 18,000 residents live in Shawnee County but work outside the community.

The Greater Topeka Partnership’s **Choose Topeka** incentive was originally intended to attract workers living in nearby counties to move to Shawnee County but later expanded to include remote workers from anywhere in the country. Choose Topeka will be discussed in more detail later in this report.

Slow population growth and unfavorable migration patterns have contributed to age dynamics that put Shawnee County at a further disadvantage in terms of talent availability. **In 2019, Shawnee County had the lowest percentage of residents aged 25 to 44 than all the benchmark areas.** With nearly 24 percent of its adults aged 25 to 44, Shawnee County noticeably trails the high-growth counties Polk (29.3%) and Minnehaha (28.8%). Equally concerning is the fact that **Shawnee County was the only community to see its percentage of 25- to 44-year-olds decline from 2014 to 2019.**

AGE DYNAMICS, 2019



Source: U.S. Census Bureau, American Community Survey

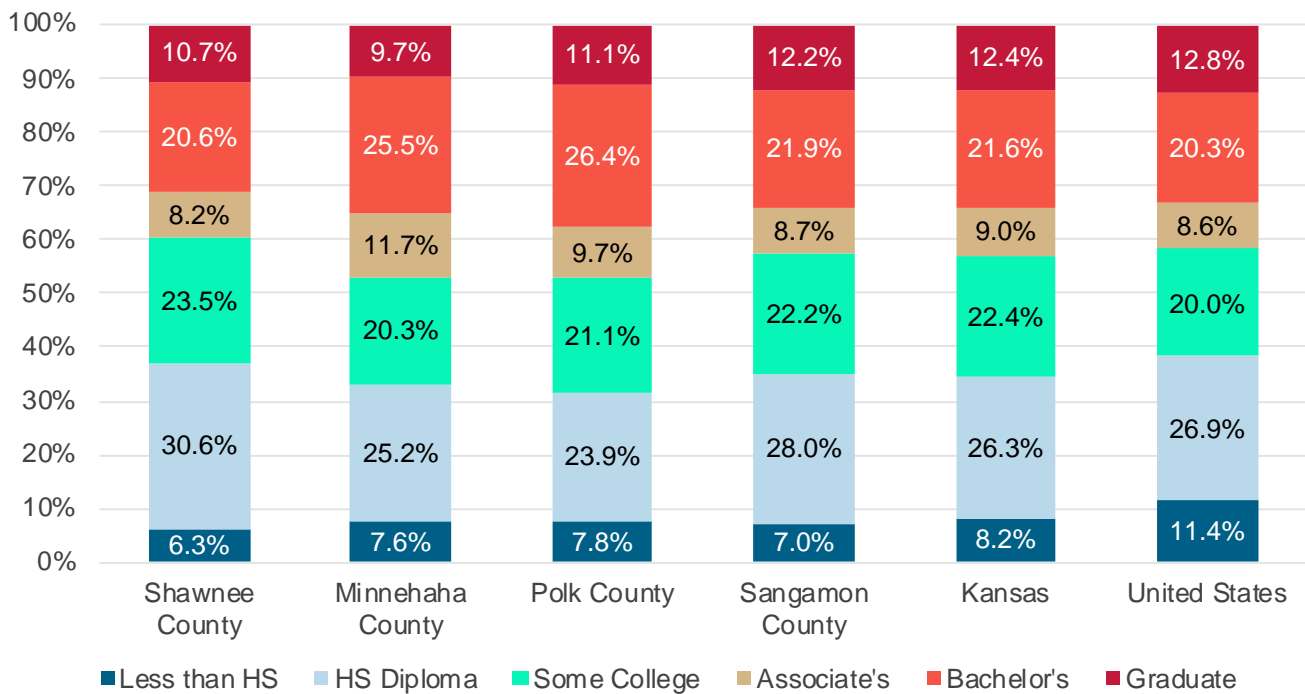
Data show that Shawnee County's 25- to 44-year-old adult population is also less educated than the benchmark geographies. In 2019, **33.4 percent of the county's 25- to 44-year-old adults had a bachelor's degree or above, below all the comparison areas**; Polk County's rate of 42.1 percent was nearly 10 percentage points higher than Shawnee County.

Educational attainment trends like these are quantitative measures frequently utilized by companies and site consultants to assess relocation markets. They are seen as proxies for the overall skill levels of a community's labor force.

Bachelor's-plus educational attainment rates for Shawnee County's total adult population 25 and over were also lower than all the benchmark communities. On a positive note, Shawnee County had the lowest percentage of adults without a high school degree and the highest percentage of working-age adults who had completed some college. This presents a key opportunity to increase the county's number of college degree-holders if these residents can be reenrolled in higher education.

From 2014 to 2019, Shawnee County saw its percentage of adults with a bachelor's degree increase by 2.3 percent, ahead of state and national rates but below all the comparison counties except Sangamon.

EDUCATIONAL ATTAINMENT, 2019



Source: U.S. Census Bureau, American Community Survey





















Bachelor's-plus degree attainment for White, Black, and Hispanic adults in Shawnee County trailed all the comparison areas. Reengaging adults on a path towards college completion could potentially help raise Shawnee County's levels of degree attainment among all its racial and ethnic populations.

Understanding the occupations that underlie a local economy can help inform strategies to enhance workforce competitiveness and target specific degree-attainment goals to support employer's hiring needs.

A look at Shawnee County's top occupations reveals that **the local economy supports thousands of workers in health care, retail, and other service sectors.** Health care jobs are also the most concentrated as a factor of location quotient.²

² Location quotient (LQ) is a simple calculation that compares local versus national employment for a particular sector. An LQ of 1.0 means an equivalent local versus national share but anything above 1.0 conveys a local advantage. The higher the LQ the greater the local specialization in that industry.

TOP 20 LARGEST OCCUPATIONS, SHAWNEE COUNTY, 2020

Occupation Group	Location Quotient	Employment
Registered Nurses	 1.72	3,423
Personal Care Aides	 1.44	2,407
Fast Food and Counter Workers	 1.06	2,403
Retail Salespersons	 0.87	2,226
Customer Service Representatives	 1.17	2,202
Cashiers	 0.90	2,024
Secretaries and Administrative Assistants, Except Legal, Medical, & Executive	 1.56	2,015
Laborers and Freight, Stock, and Material Movers, Hand	 0.93	1,788
Nursing Assistants	 1.97	1,782
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	 1.15	1,621
Stockers and Order Fillers	 1.05	1,565
General and Operations Managers	 0.81	1,262
Teaching Assistants, Except Postsecondary	 1.42	1,134
Waiters and Waitresses	 0.84	1,069
Heavy and Tractor-Trailer Truck Drivers	 0.77	1,000
First-Line Supervisors of Office and Administrative Support Workers	 1.05	998
Bookkeeping, Accounting, and Auditing Clerks	 0.96	990
Project Management Specialists & Business Operations Specialists, All Other	 1.01	966
Accountants and Auditors	 1.06	962
Elementary School Teachers, Except Special Education	 1.08	909
Total		32,746

Source: JobsEQ, BRS

Note: Location quotients (LQs) are a ratio of the region's share of employment in a given occupation divided by that same occupation's share of total national employment. A location quotient great than 1.0 indicates that the region's share of employment in a given occupation is greater than the average American community. Yellow dots indicate an LQ between 0.75 and 1.25. Green dots indicate an LQ above 1.25.

Drawing from years of need, Shawnee County has long established training pipelines for nursing occupations at local colleges and through a career track at Topeka Public Schools' Topeka Center for Advanced Learning and Careers (TCALC). Even so, hospitals and other health care employers reported challenges filling open nursing positions, particularly because competition for this talent is so intense.

Entry level health care positions were even more difficult to fill, employers said, because employers like Walmart, Amazon, and others have raised hourly rates to address their own talent shortages.

Projected growth rates from JobsEQ/Chmura for Shawnee County occupations indicates that retail and health care workers will continue to be in great demand in the next five years. Fast Food and Counter Workers is the largest Shawnee County growth occupation in the next five years with 2,213 projected new jobs, followed by Personal Care Aids (2,167 jobs), Cashiers (1,598 jobs), Retail Salespersons (1,434), and Customer Service Representatives (1,294 jobs).

II. Significant workforce training assets, but coordination and capacity can be improved

Talent challenges are not new for Topeka-Shawnee County's education and training institutions and their partners in social services, business, government, and economic development. Efforts have been advancing for years to develop new infrastructure and programmatic capacity, better coordinate training providers, connect them more effectively with employers, and ensure that students of all ages have the support necessary to graduate college and career ready.

A signature recommendation to emerge from Momentum 2022 was the creation of a **cradle-to-career (C2C) education partnership** in Topeka-Shawnee County to optimize pathways for local students from early childhood to college and the workplace. Though the partnership did not come to fruition, community leaders still feel improved alignment between the supply and demand sides of the workforce pipeline is a worthwhile pursuit but are unsure what form it would take.

Pre-K to 12 public school districts across Shawnee County can point to improved student performance as evidence that strategies to boost outcomes are showing promise. This is especially true in Topeka Public Schools (TPS) (District 501), where recent years have seen dramatic increases in graduation and success rates.

Early childhood education has been demonstrated by research as key to students' long-term success. **Trends show that Shawnee County is falling behind its peers in the percentage of its 3- and 4-year-old children enrolled in school.** Only Minnehaha County has a lower percentage of 3- and 4-year-olds in school programs than Shawnee County, which also showed the greatest percentage point decline in participation among all the benchmarks.

PERCENTAGE OF 3- AND 4-YEAR OLDS ENROLLED IN SCHOOL, 2010 TO 2019

Geography	2010-2014	2015-2019	% Pt. Chg
Shawnee County	44.5%	40.5%	-4.0%
Minnehaha County	37.1%	39.7%	2.6%
Polk County	44.7%	43.1%	-1.6%
Sangamon County	51.3%	59.1%	7.8%
Kansas	45.2%	47.6%	2.4%
United States	47.4%	48.3%	0.9%

Source: U.S. Census Bureau, American Community Survey 5-year estimates

Once they reach Pre-K to 12 public systems, Topeka area students are increasingly seeing their performance levels improve. **Every public school district included in Momentum 2027 analysis except one exceeded the state average for dropout rate, graduation rate³, and success rate⁴** (Kaw Valley was also slightly below the state average for success rate). Despite being below the state average for all these categories, **Topeka Public Schools showed by far the greatest improvement on each indicator over the previous five years.**

PERFORMANCE DATA, TOPEKA AREA PUBLIC SCHOOL DISTRICTS, 2014-15 TO 2019-20

District	2019-2020			5-yr Pct. Pt. Chg.		
	Drop-out Rate	Graduation Rate	Success Rate	Drop-out rate	Graduation rate	Success Rate
Kaw Valley	0.6%	97.3%	52.4%	0.0%	-0.6%	0.2%
Seaman	0.8%	94.2%	54.7%	-0.1%	3.1%	3.3%
Silver Lake	0.6%	96.1%	74.4%	0.0%	1.7%	8.2%
Auburn Washburn	1.2%	91.7%	57.3%	0.2%	3.1%	-1.6%
Shawnee Heights	0.5%	93.3%	55.8%	-0.3%	2.3%	3.1%
Topeka Public Schools	2.3%	81.7%	39.9%	-1.1%	10.6%	7.0%
State average	1.3%	88.2%	54.0%	-0.3%	2.5%	-1.1%

Source: Kansas State Department of Education

³ The four-year adjusted cohort **graduation rate** is the number of students who graduate in four years with a regular high school diploma divided by the number of students who entered high school as 9th graders four years earlier.

⁴ **Success Rate** measures the percentage of students meeting at least one of the following four outcomes within two years of high school graduation: 1) Student earned an Industry Recognized Certification while in high school; 2) Student earned a Postsecondary Certificate; 3) Student earned a Postsecondary Degree; 4) Student enrolled in Postsecondary in both the first and second year following high school graduation.

To determine students’ **“postsecondary readiness,”** the Kansas State Department of Education now assesses and reports results by subject area in four “levels.” Each level measures a student’s ability to understand and use subject area skills and knowledge needed to succeed after high school.

The following data include performance levels aggregated by all applicable subjects, buildings, grades, and subgroups.

POSTSECONDARY READINESS, TOPEKA AREA PUBLIC SCHOOL DISTRICTS, 2020-2021

District	Level 1	Level 2	Level 3	Level 4
Kaw Valley	29.1%	44.8%	21.3%	4.9%
Seaman	26.6%	41.5%	23.2%	8.7%
Silver Lake	13.2%	36.7%	28.6%	21.6%
Auburn Washburn	26.4%	39.8%	23.7%	10.1%
Shawnee Heights	31.1%	41.8%	21.0%	6.2%
Topeka Public Schools	48.0%	35.0%	13.2%	3.9%
State average	34.4%	37.7%	20.1%	7.8%

Source: Kansas State Department of Education

Of the Topeka area public districts, **Silver Lake features the largest percentage of students postsecondary ready at the higher levels.** Nearly one in five students has “excellent” proficiency across all subject categories. Most Topeka area districts are above the state average for all levels. Topeka Public School students have strong “limited” ability levels but decline to proficiencies below the state average for higher degrees of subject area understanding and use.

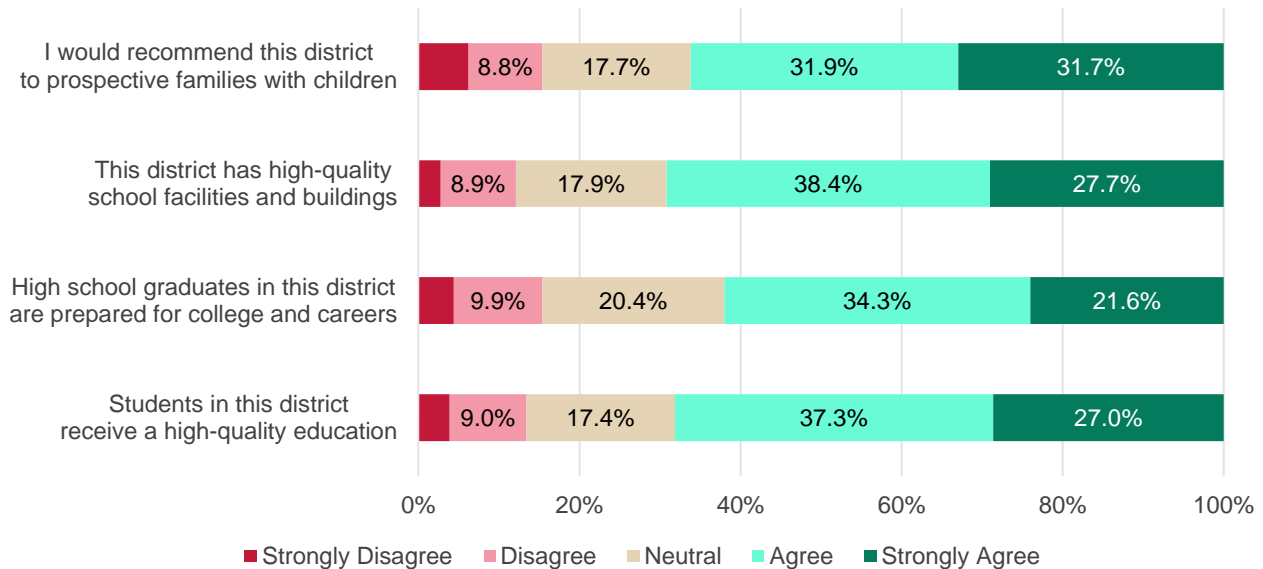
With the most diverse student population in Kansas according to Niche.com and 72 percent of its students eligible for free or reduced lunches, Topeka Public Schools faces challenges that other Topeka area districts do not. These challenges were exacerbated by the Covid-19 pandemic, which brought to light disparities in access to broadband internet when schools went all virtual during mandated lockdowns.

Respondents on the Momentum 2027 online survey were asked what school district they were most familiar with. Nearly 37 percent answered Topeka Public Schools, with Auburn-Washington second at 18.8 percent followed by Shawnee Heights at 9.9 percent and Seaman at 9.8 percent.

It is clear by their ratings that survey respondents have strongly positive feelings about the school districts in Topeka-Shawnee County. Large majorities either agreed or strongly agreed that

their district provided students with a quality education that prepares them for college and careers. Nearly 64 percent would recommend their district to prospective families with children.

**PLEASE RATE THE FOLLOWING STATEMENTS ABOUT THE SCHOOL
DISTRICT YOU SELECTED:**



Source: Momentum 2027 online survey; BRS

Percentage of respondents who answered "Don't Know" is not shown

As the next stage of the Pre-K to 20 pipeline, higher education institutions are a critical bridge to the labor force. **Washburn University, Washburn Tech, and Baker University School of Nursing were cited repeatedly by public input participants as critical assets for workforce and economic development** in Topeka-Shawnee County. In fact, the new Washburn Tech East campus on SE Washington Street in East Topeka is considered by many to be the signature Momentum 2022 victory to date.

Indicative of the demand for graduates with career-ready skills, **the Topeka area has seen a dramatic increase in the percentage of Associate's degrees awarded between 2010 and 2020.** Nearly 200 percent more two-year degrees were granted during this period, compared to an increase of 6.6 percent in Bachelor's and 33.9 percent in Master's degrees.

HIGHER EDUCATION DEGREE AWARDS, TOPEKA AREA, 2010 TO 2020

Indicator	All Award Levels	Certificates	Associate's	Bachelor's	Master's	Doctorate
Degree Awards, 2020	2,552	1,023	259	927	154	118
Change, 2010-2020	19.4%	20.8%	194.3%	6.6%	33.9%	-15.1%

Source: JobsEQ

Shifting demand is also reflected in enrollment trends at Washburn Tech and Washburn University. Washburn Tech saw its student population expand over a ten-year period from 676 students in 2010 to 1,480 in 2020, a gain of 118.9 percent. Conversely, Washburn University's enrollment over that decade peaked at 7,303 students in 2012 and now stands at 6,285, a decline of 13.9 percent.

A common input theme was the opportunity for Washburn to partner more effectively with the greater Topeka community on promotional activities, integration of students in area companies and civic networks, and capitalizing on student spending to support local businesses.

Interviewees cited Washburn's Leadership Institute and Learning in the Community (LinC), the university's Center for Community and Civic Engagement, as the most engaged units on campus with outside partners but noted there is no collaborative or cohesive university-wide strategy for connecting with the broader community, so efforts are "department or unit specific and siloed."

Washburn Tech was similarly the subject of both praise and hope that the institution could be better leveraged for local growth and development. In addition to the potentially transformative impact of the new Washburn Tech East campus, businesses singled out Washburn Tech as a key partner working on developing programming "for all the skilled industries people want now."

However, the college is challenged to expand existing programs and develop new degree offerings by a lack of institutional buildings and classroom space. One official noted that **Washburn Tech "is essentially built out," and will need new facilities and equipment to expand the breadth of its training capacity.** Programs are also constrained by continuing challenges finding and keeping qualified faculty, who can earn significantly more at private sector firms desperate for skilled talent.

Corporate and academic leaders both expressed the desire for closer partnerships between the demand and supply sides of the local labor market. One business executive advocated for "the establishment of a more robust and intentional relationship between business and education," noting that, to date, these relationships have been "haphazard and ineffective."

On the supply side, a representative from academia was also concerned that “we don’t have the necessary level of communication with employers. We want a better way to get them at the table, for them to tell us what they need. We all have advisory boards, but we still need to know what’s coming down the pike.” This is not to say there is no current engagement between business and training. Multiple employers discussed successful partnerships with higher education and K-12 districts, especially Topeka Public Schools’ TCALC campus.

A key challenge affecting TCALC’s ability to continue providing skilled graduates for local industry is the campus’ space constraints. Like Washburn Tech, TCALC’s programmatic capacity is limited by lack of classroom space and difficulty finding instructors. A TCALC representative noted that “we have much greater demand than supply.”

Internships are a proven way of connecting students with employers and improving the odds that talent will remain in a community to live and work. While Topeka-Shawnee County features multiple companies benefitting from internship programs, nearly all of them initiated the effort on their own. **Stakeholders commented that there is not a system in place to coordinate the internship-development process.** “Nobody owns it,” one interviewee noted.

A focus group with Washburn University students revealed that, despite on-campus career placement resources, most internship opportunities were communicated by departments and professors leveraging personal relationships with local companies. The same holds true for post-graduate employment, although multiple students referenced a Washburn-only career fair as a good source of professional opportunities as well as the “Handshake” database offered to students through a university subscription.

Numerous business representatives singled out the Top City Interns program offered by Forge, the Greater Topeka Partnership’s young professionals (YP) network, as a key boost to their abilities to retain interns as full-time employees. Launched in 2017, Top City Interns was created with the purpose of providing students with a positive internship experience while investing in their future as professionals.

III. Topeka-Shawnee County continues to be a challenging talent recruitment market

As migration data presented earlier in this story demonstrated, Topeka-Shawnee County has experienced negative net domestic migration for many years, slowing the region’s population growth and constraining its talent supply.

The Choose Topeka incentive was developed out of Momentum 2022 as a tool to stem the tide of talent working in Shawnee County but living elsewhere. As the Covid-19 pandemic took hold and remote work became a growing phenomenon, Choose Topeka was expanded to include anyone in the country willing to relocate and work remotely from Shawnee County for one year.

Most businesses surveyed for Momentum 2027 said they were aware of the Choose Topeka program but had not utilized it. Almost universally, employers spoke of the challenges they have attracting talent to the Topeka market. Many said they promote the opportunity to live in Lawrence or Kansas City and the relatively easy community to Topeka as an arrow in their talent recruitment quiver.

The type of candidate companies said is easier to recruit to Topeka-Shawnee County is “not so much the young, mobile IT type,” but older, more settled professionals, usually with a family. Newly married talent prospects looking for an affordable entry-level home and a more family-friendly community are also more likely to relocate to Topeka, interviewees said.

Later in this report and in the Momentum 2027 strategy, opportunities to make Topeka-Shawnee County more competitive for talent will be discussed and explored. **Recent years have also seen the Topeka area make great strides in its attempt to be “stickier” for skilled professionals with multiple options on where to live. The reality is that community change takes time;** but the fact that Topeka-Shawnee County’s leadership has strongly embraced the urgency to become a more dynamic destination for talent bodes well for the region’s future prospects.

IV. Key barriers remain to fully engage Topeka-Shawnee County talent in the workforce

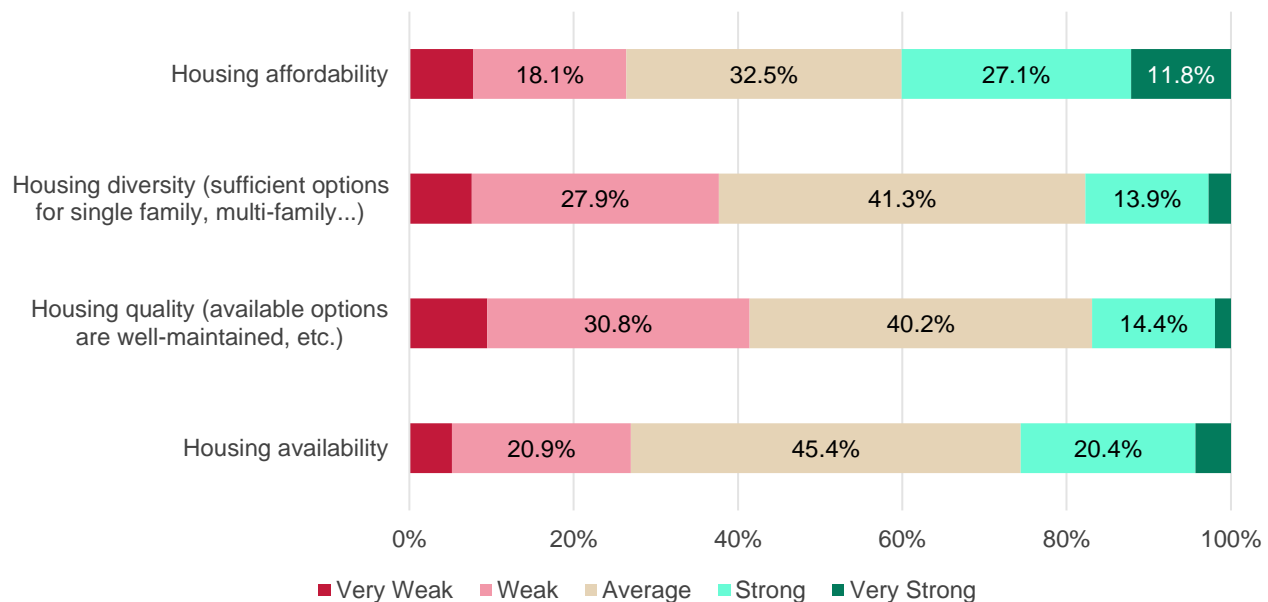
Three themes emerged consistently in Momentum 2027 stakeholder input that serve to limit the ability of workers to effectively seek quality, full-time employment or access training resources. These were: 1) housing, 2) childcare, and 3) broadband internet. Each of these challenges is not only national in scope but was exacerbated by impacts of the Covid-19 pandemic. As such, Topeka-Shawnee County alone will not be able to adequately address these issues without additional resources from state and federal government.

Of all the challenges today’s communities face to ensure workers can remain in their jobs and sustain healthy, rewarding lifestyles, housing is the most critical. This is not a Topeka-Shawnee County issue, or a Kansas issue, or even a U.S. issue; there is a worldwide crisis in housing availability that nations across the globe are working to address.

Momentum 2027 stakeholder input participants from constituencies across the public-to-private spectrum commented on housing challenges faced by residents and employers. Whether it was a lack of higher-end housing for top earners, a shortage of quality, market-rate rentals for single professionals, or limited affordable housing for individuals and families struggling to make ends meet or currently living in sub-standard homes and apartments, stakeholders expressed a wide range of opinions on the issue.

Online survey respondents concurred that Topeka-Shawnee County’s housing market was a challenge. While praising the affordability of local housing, respondents were less complimentary about the availability, quality, and diversity of housing in the community.

PLEASE RATE THE FOLLOWING FEATURES OF GREATER TOPEKA'S QUALITY OF LIFE



Source: Momentum 2027 online survey; BRS

Percentage of respondents who answered “Don’t Know” is not shown

The City of Topeka recently contracted with consulting firm Development Strategies to produce a **Citywide Housing Market Study and Strategy** released in July 2020. The report estimated 20-year demand for multiple housing types, including 4,000 units of affordable housing; 3,650 units of workforce housing (wage-earners between \$33,000 and \$66,000); 3,100 for-sale and 1,400 rental market-rate units; 2,250 senior housing units; and more transitional beds for persons experiencing homelessness.

A department official explained that the City of Topeka is working to implement the study's recommendations, most importantly the creation of a Strategic Land Bank and the full capitalization of the Affordable Housing Trust Fund. The land bank was also a priority of Momentum 2022.

Trend data show that housing across all Topeka-Shawnee County remains more affordable than every Momentum 2027 benchmark area. Shawnee County's 2019 median home price of \$134,000 was more than \$11,000 below the closest market, Sangamon County, and well below the Kansas and U.S. averages. Moreover, **Shawnee County's housing costs increased at a slower rate than every comparison area except Sangamon County** and were well below state and national increases.

MEDIAN SINGLE FAMILY HOME PRICE, 2014 TO 2019

Geography	2014	2019	\$ chg.	% chg.
Shawnee County	\$121,900	\$134,400	\$12,500	10.3%
Minnehaha County	\$159,100	\$216,200	\$57,100	35.9%
Polk County	\$161,000	\$198,400	\$37,400	23.2%
Sangamon County	\$132,200	\$145,600	\$13,400	10.1%
Kansas	\$132,100	\$163,200	\$31,100	23.5%
United States	\$181,200	\$240,500	\$59,300	32.7%

Source: U.S. Census Bureau, American Community Survey

While not always the case, lower housing costs in Shawnee County translated to greater affordability for the average household. Calculated by comparing median home price with median household income, **Shawnee County had a 2019 affordability ratio of 2.3, lowest of all the benchmarks.** The ratio was also unchanged from 2014.

Rental properties in Shawnee County were cheaper than every comparison area except Sangamon County. Median gross rent in Shawnee County in 2019 was \$831 compared to \$812 in Sangamon County, \$862 in Kansas and \$1,097 nationally. Similarly, only Sangamon County experienced a slower increase in rental rates from 2014 to 2019.

The percentage of cost-burdened renters (those paying more than 30 percent of their income on rent) in Shawnee County was 48.5 percent in 2019, roughly equivalent with most peer communities and below the U.S. average of 48.4 percent. Shawnee County's rate also decreased more than every benchmark except Sangamon County.

Perhaps an indication of unmet demand for local housing, **Topeka area real estate values have been appreciating “at their fastest pace ever,”** according to the Wichita State University Center for Real Estate’s 2022 Kansas Housing Market Forecast Series. The report noted that home prices in the Topeka MSA rose 8.3 percent in 2021 and are projected to increase by 4.5 percent in 2022.⁵ The Topeka MSA was also listed third out of 300 regions in the Wall Street Journal/Realtor.com Emerging Housing Markets Index Fall 2021.

As home prices rise and Topeka-Shawnee County’s stock of available homes and apartments continues to constrict, developers might see greater potential in the market and construct much needed new housing that could potentially address current supply deficits.

Access to affordable childcare was another stakeholder-reported challenge keeping workers from participating fully in the labor force. As with housing, lack of sufficient numbers of affordable, licensed childcare slots is a national issue which will likely require solutions beyond what a local community can provide. Complicating matters in Topeka-Shawnee County is the fact that significant childcare demand comes from individuals working off-peak overnight shifts at production plants or hospitals.

Nearly a third of the respondents on the Momentum 2027 online survey were unfamiliar with the quality of childcare in Topeka-Shawnee County. Among those who felt they could speak to the issue, **over 50 percent said the availability of childcare was weak or average.**

Data from the Kansas Department of Health and Environment show that, as of the year 2020, Shawnee County had 48 licensed childcare facilities, which include childcare centers and day care homes with state licenses or temporary permits. Per capita, this figure is slightly above the state average. However, the number of licensed facilities in Shawnee County actually decreased by one since 2017.

This state’s definition of licensed facilities does not account for the majority of childcare providers, which are typically small businesses or sole proprietorships. Nor does it consider the role of extended family watching children for a working parent(s).

Despite the prospect of significant federal stimulus directed towards enhancing America’s childcare capacity, experts caution that talent issues, government regulations, and staffing limitations in licensing departments are barriers to significantly adding to communities’ supply of affordable childcare slots.

Perhaps even more than childcare and housing, the pandemic highlighted challenges around access to broadband internet as a significant constraint for many American families. **Shawnee County was less**

⁵ Hrenchir, Tim. “Topeka real estate market ‘white hot’ as Kansas home prices are rising.” Topeka Capital-Journal, 10/19/21.

prepared to manage online education due to its lower percentages of total and minority households without computers and internet subscriptions. Census data show that the majority of black households in Shawnee County do not have a computer with internet access, while nearly 36 percent of Hispanic households also lack this connectivity.

Topeka Public Schools has been a vocal leader on the need to address digital equity issues in the city. In 2021, the district will launch a virtual, college prep academy for elementary students. Recently, **the City of Topeka was awarded \$250,000 from the \$1.1 million Kansas Digital Equity and Inclusion Collaborative** seeking to increase broadband access and technical opportunity for low-income households. The city will use this funding to hire two part-time employees to work with Topeka Public Schools to provide digital literacy training and technical support for minority and low-to-moderate-income communities in 31 Topeka neighborhoods. The grant will also fund the development of another internet hotspot in the city.⁶

⁶ <https://www.cjonline.com/story/news/2021/08/11/city-topeka-wants-address-digital-equity-grant-unified-school-district-501-kansas/5455192001/>

Story 3: Core strengths and new assets promise improved economic performance

Chapters:

- I. **Pandemic recovery efforts brought the community together**
- II. **Employment growth and worker productivity has lagged**
- III. **Stable economic structure in sectors with competitive wages**
- IV. **A functional entrepreneurial ecosystem receives a big boost**

1. Pandemic recovery efforts brought the community together

Stakeholders engaged in Momentum 2022 told similar stories about the need to pause strategic implementation to focus on supporting local businesses through the impacts of the Covid-19 pandemic. While this set back implementation to a certain degree, leaders believe it was the correct and necessary response to an unprecedented economic disruption.

Guided by the Topeka Shawnee County Community Recovery Taskforce, the Greater Topeka Partnership was a lead entity along with the City of Topeka and Shawnee County in managing and coordinating efforts to mitigate pandemic-related impacts. The work of GTP and partner governments drew wide praise from community stakeholders and public and private leaders as critical to pandemic recovery.

The lynchpin of recovery activities was the **Support Topeka** website – housed and administered by GTP - which provided information in English and Spanish on resources for businesses and residents. The Support Topeka site linked to a five-minute community survey to enable stakeholders to weigh in on local challenges and support needs.

The Core Recovery Team included representative of key organizations, community groups and individuals with a vested interest in the community's recovery. Task forces were formed and charged with ensuring the appropriate stakeholders were in place to create positive change.

To assess the efficacy of statewide recovery efforts and inform local responses, the GTP published regular Covid-19 Dashboards with detailed data across multiple economic and demographic indicators.

II. Employment growth and worker productivity has lagged

Five- and ten-year employment change data show that Topeka-Shawnee County's economy has not kept pace with the growth rates of peer communities, Kansas, or the U.S. The one exception is Sangamon County, which has seen greater employment loss over the last decade.

From the second quarter of 2011 to the equivalent quarter in 2021, Shawnee County lost 643 jobs, representing a decline of 0.6 percent. Five-year losses were even higher, with the local economy shedding 2,977 (-2.9%) jobs from Q2-2016 to Q2-2021. This contrasted with strong growth in Polk and Minnehaha counties. State and national data were more equivalent with Shawnee County trends.

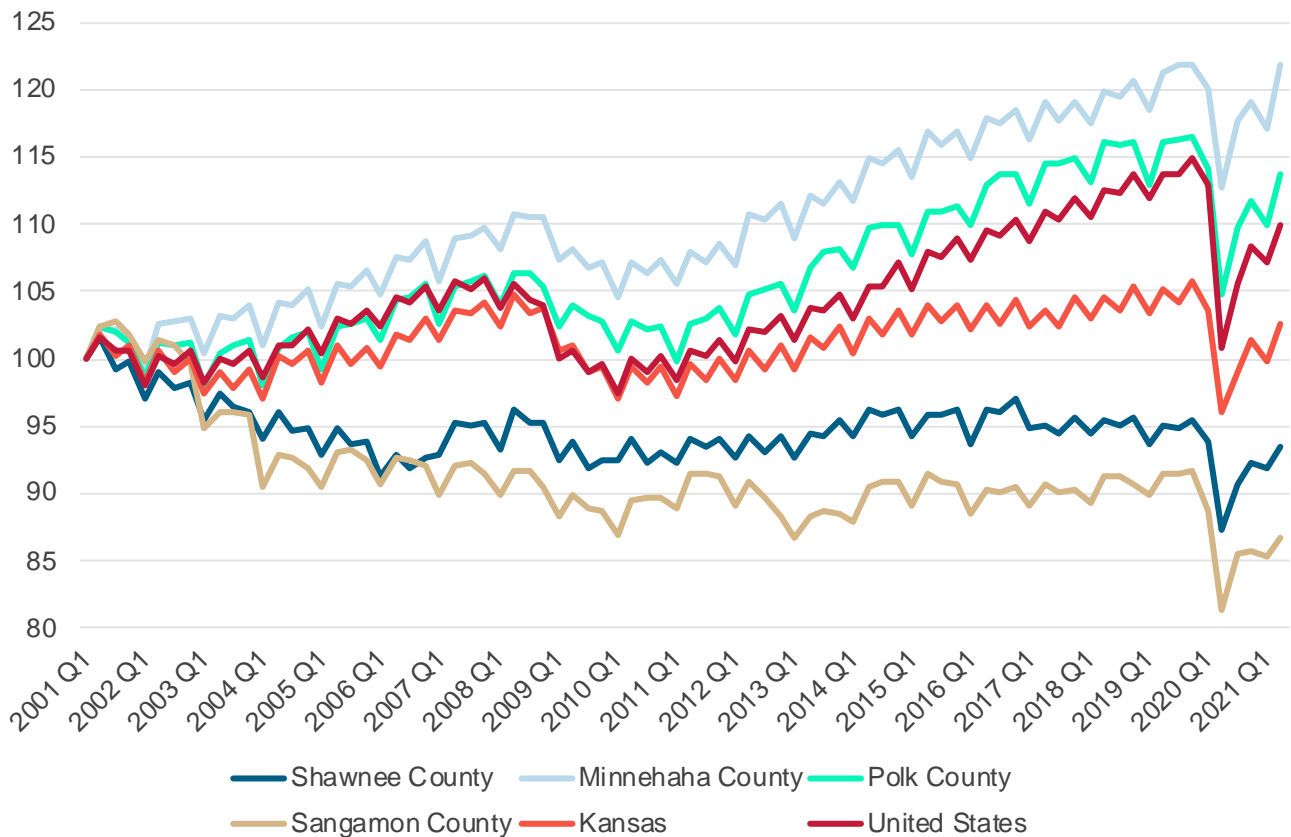
TOTAL EMPLOYMENT, Q2 2011 TO Q2 2021

Geography	Q2 2011	Q2 2016	Q2 2021	5 yr. % chg.	10 yr. % chg.
Shawnee County	101,196	103,531	100,553	-2.9%	-0.6%
Polk County	282,401	310,884	313,283	0.8%	9.9%
Minnehaha County	120,699	131,789	136,033	3.2%	11.6%
Sangamon County	137,229	135,627	130,240	-4.0%	-5.2%
Topeka, KS MSA	116,458	119,229	115,462	-3.2%	-0.8%
Kansas	1,435,398	1,500,248	1,480,080	-1.3%	3.0%
United States	141,278,485	153,787,972	154,231,327	0.3%	8.4%

Source: JobsEQ

When indexed over a 20-year period beginning in Q1-2001, only Sangamon County has performed worse than Shawnee County. Once again, Minnehaha and Polk counties were outliers, experiencing growth rates well exceeding state and national levels.

EMPLOYMENT GROWTH INDEX, Q1 2001 TO Q2 2021; Q1 2001 = 100



Source: JobsEQ, BRS

Another way to measure economic output is through calculating gross domestic product (GDP) or the total value of goods and services produced within a specified geographic area. **Analysis of GDP shows that Shawnee County has also underperformed versus the benchmark areas for this high-level metric of economic vitality.**

PER CAPITA GROSS DOMESTIC PRODUCT (THOUSANDS OF DOLLARS), 2014 TO 2019

Geography	2014	2019	% Chg., 2014-19
Shawnee County	\$52.3	\$60.6	15.9%
Minnehaha County	\$88.0	\$103.1	17.2%
Polk County	\$75.7	\$88.5	16.9%
Sangamon County	\$52.6	\$63.0	19.8%
Kansas	\$51.4	\$60.6	18.0%
United States	\$55.1	\$65.1	18.1%

Source: U.S. Bureau of Economic Analysis; U.S. Census Bureau Population Estimates

All figures are shown in current dollars.

In 2019, Shawnee County's per capita GDP was equal to the state, but below the comparison counties and national figures. The dynamic performance of the Minnehaha and Polk county economies are again evident in these data.

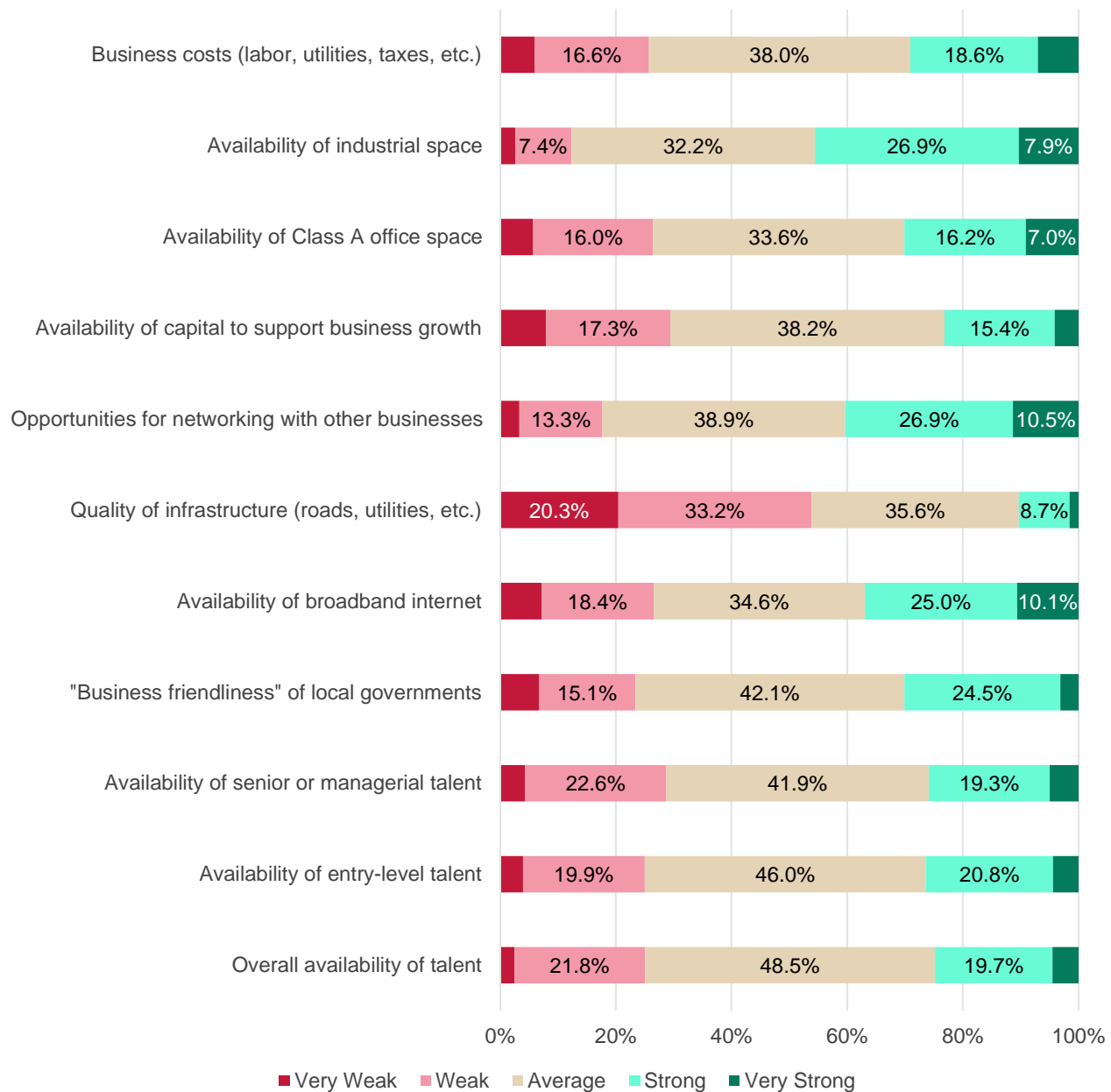
When examined per worker, Shawnee County's productivity is also below the benchmark areas.

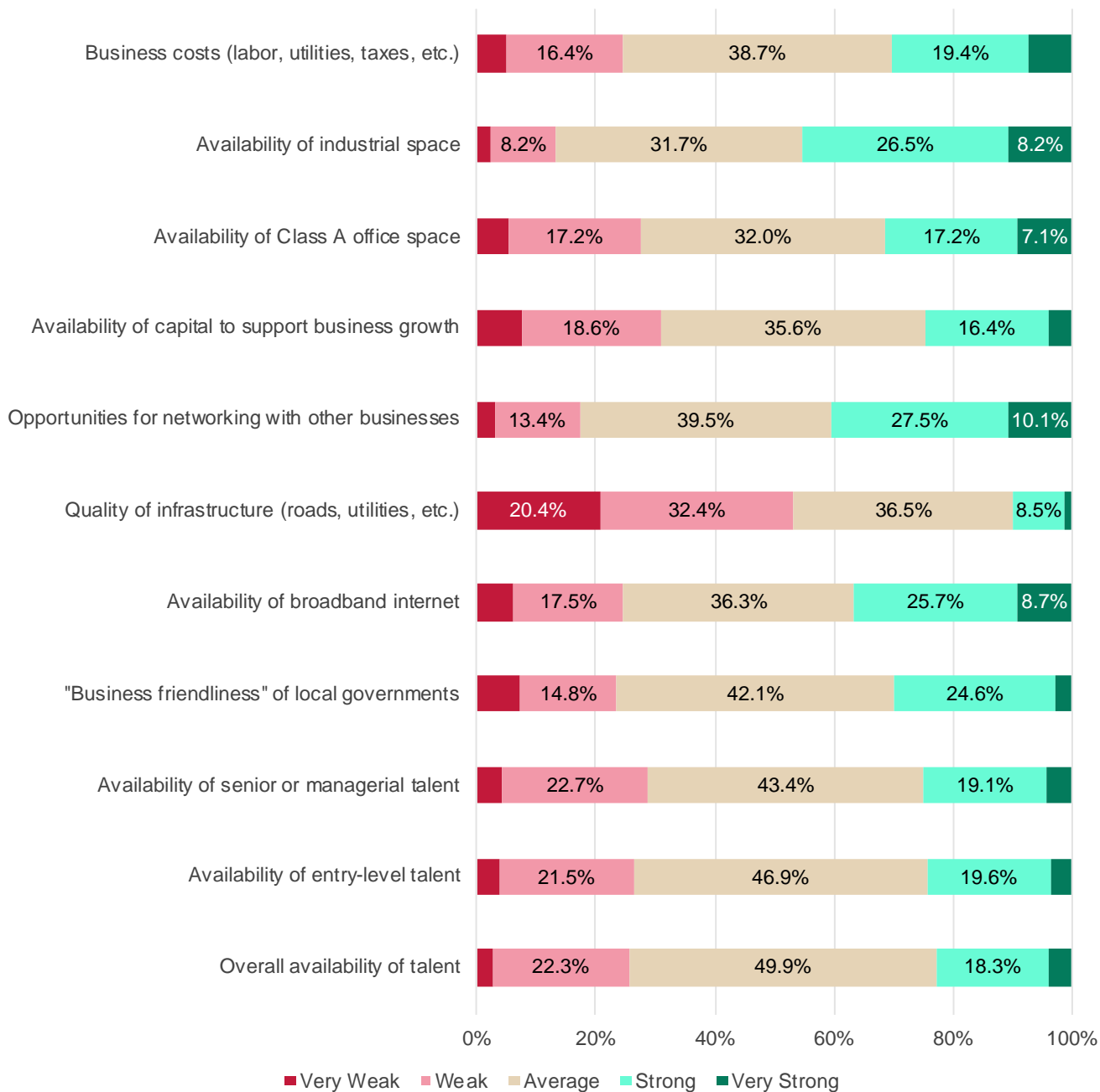
Productivity by worker is calculated by dividing total economic output (GDP + intermediary inputs, or those products and services used as inputs to produce other products and services) divided by total employment in the most recent quarter. **Shawnee County's productivity per worker of \$172,504 in Q2 2021 was roughly equivalent to Sangamon County but more than \$23,000 per worker lower than Kansas and well below Minnehaha and Polk counties and the U.S.** Consistent with GDP trends, these data demonstrate that Shawnee County is seeing less direct economic impact from its employer base than the benchmark communities.

Momentum 2027 focus group participants commented on certain business climate issues they feel are adversely affecting local growth. Many believe that sales taxes in the City of Topeka are higher than expected in a community of Topeka's size and limit consumer spending. Acknowledging that the system has improved, small to medium sized businesses also feel that the City of Topeka's permitting process discourages investment and does not represent a "we'll work with you attitude" experienced in other communities. Finally, some local business people would like to see job creation incentives tied to investments other than real property to better support growth in the knowledge economy.

Momentum 2027 survey respondents who self-identified as executive or managerial level employees generally believed that Topeka-Shawnee County's talent capacity was weak to average, but they **were most pessimistic about the quality of the region's infrastructure**. Respondents were most complimentary about networking opportunities in the community.

PLEASE RANK THE FOLLOWING FEATURES OF GREATER TOPEKA'S BUSINESS CLIMATE





Source: Momentum 2027 online survey; BRS
 Percentage of respondents who answered "Don't Know" is not shown






















III. Stable economic structure in sectors with competitive wages

As a capital city with a strong base in government, health care, manufacturing, finance and insurance, and headquarters, **Topeka-Shawnee County is well positioned structurally to become more economically vibrant.**

A handful of Topeka-Shawnee County's key sectors saw employment declines from Q2-2016 to Q2-2021, but others like Manufacturing, Professional, Scientific, and Technical Services, and Transportation and Warehousing outperformed their national sectors. Health care was also a bright spot. Importantly, **most of Topeka-Shawnee County's most concentrated employment sectors pay annual wages above the county average.** Declines in retail, food service, and administrative and support (includes temp jobs) sectors likely reflect pandemic-related impacts.

Location quotients of 2.31 in Public Administration, 1.38 in Finance and Insurance, and 1.30 in Health Care demonstrate that Topeka-Shawnee County has a competitive advantage in these sectors that can be leveraged for future growth. While Finance and Insurance tends to be closely tied to the national economy, Public Administration and Health Care are stable employers regardless of broader trends.

EMPLOYMENT STRUCTURE, SHAWNEE COUNTY, Q2 2016 TO Q2 2021

Sector	 Location Quotient	Employment	# Chg.	% Chg.	US % Chg.	Avg. Ann. Wage
Health Care & Social Assistance	 1.30	19,111	745	4.1%	4.9%	\$53,878
Public Administration	 2.31	11,278	-117	-1.0%	2.6%	\$52,560
Retail Trade	 0.88	9,068	-927	-9.3%	-4.1%	\$28,522
Manufacturing	 0.90	7,303	715	10.9%	-1.6%	\$58,547
Educational Services	 0.90	7,178	-676	-8.6%	-3.4%	\$39,627
Admin. & Support & Waste Mgmt.	 1.01	6,387	-918	-12.6%	-1.9%	\$31,123
Accommodation & Food Services	 0.83	6,254	-961	-13.3%	-14.6%	\$17,934
Finance & Insurance	 1.38	5,704	-527	-8.5%	4.7%	\$82,315
Professional, Scientific, & Tech. Svcs.	 0.74	5,222	438	9.2%	8.5%	\$61,660
Construction	 0.80	4,698	-498	-9.6%	8.1%	\$54,236
Other Services (except Public Admin.)	 1.04	4,471	-385	-7.9%	-5.0%	\$37,999
Transportation & Warehousing	 0.89	4,362	763	21.2%	17.8%	\$53,590
Wholesale Trade	 0.68	2,554	-509	-16.6%	-4.8%	\$70,853
Mgmt. of Companies & Enterprises	 1.04	1,573	-367	-18.9%	4.1%	\$137,660
Information	 0.58	1,139	-478	-29.6%	-2.7%	\$61,703
Real Estate & Rental & Leasing	 0.58	1,005	-194	-16.2%	1.9%	\$46,142
Arts, Entertainment, & Recreation	 0.48	758	-107	-12.4%	-19.4%	\$18,905
Utilities	 0.95	503	344	215.8%	-1.8%	\$86,183
Ag., Forestry, Fishing & Hunting	 0.27	371	-18	-4.6%	-4.4%	\$17,338
Mining, Quarr., & Oil/Gas Extraction	 0.28	94	15	18.5%	-23.8%	\$58,261
Total		99,033	-3,662	-3.6%	-0.5%	\$49,977

Source: JobsEQ

Note: Location quotients (LQs) are a ratio of the region's share of employment in a given business sector divided by that same sector's share of total national employment. A location quotient great than 1.0 indicates that the region's share of employment in a given sector is greater than the average American community, and may be a sign that the region affords businesses in this sector with some level of competitive advantage. Red dots indicate an LQ below 0.75, yellow dots indicate an LQ between 0.75 and 1.25, and green dots indicate an LQ above 1.25.

The previous table listed all local sectors at the “two-digit” NAICS level – a federal classification system to categorize businesses by their type of employment. Examining NAICS data at the “four-digit” level provides even greater insight into Topeka-Shawnee County’s economic structure and highlights specialization in the health care, retail, and educational services sectors.

20 LARGEST BUSINESS SUBSECTORS IN SHAWNEE COUNTY, Q2 2021

NAICS Code	Subsector	Employment
6221	General Medical and Surgical Hospitals	7,969
6111	Elementary and Secondary Schools	5,561
7225	Restaurants and Other Eating Places	5,391
9211	Executive, Legislative, and Other General Government Support	4,155
5613	Employment Services	3,303
6241	Individual and Family Services	3,014
9231	Administration of Human Resource Programs	2,876
3119	Other Food Manufacturing	2,451
9221	Justice, Public Order, and Safety Activities	1,861
5242	Agencies, Brokerages, and Other Insurance Related Activities	1,728
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	1,727
6233	Continuing Care Retirement Communities & Assisted Living Facilities for Elderly	1,688
5617	Services to Buildings and Dwellings	1,664
5241	Insurance Carriers	1,624
4931	Warehousing and Storage	1,580
5511	Management of Companies and Enterprises	1,573
4451	Grocery Stores	1,543
3262	Rubber Product Manufacturing	1,534
9261	Administration of Economic Program	1,522
2382	Building Equipment Contractors	1,476

Source: JobsEQ

The four-digit NAICS sub-sectors projected to grow the fastest in the next five years are concentrated in health care, mining, social services, and transportation. It should be noted that some sub-sectors like mining are starting from a much smaller base of employment.

Interviewees and focus group participants were bullish on Topeka-Shawnee County's prospects in its key industries. A health care executive noted, "For a town this size we have incredible hospitals – really robust medical infrastructure." Local health care employers invested tens of millions in new capital buildings and renovations on their campuses, recruited dozens of physicians, and significantly ramped up their telemedicine visits during the pandemic. Some leaders feel that Topeka-Shawnee County can become even more of a regional health care destination if it can build upon its existing assets and better market the cost and convenience of a smaller market versus the medical presence in Kansas City.

Topeka-Shawnee County's presence in the heart of the globally renowned Animal Health Corridor was also cited as a key competitive advantage.

IV. A functional entrepreneurial ecosystem receives a big boost

Around 80 percent of a community's jobs are created at existing businesses. The capacity to seed, launch, sustain, and grow small businesses is a critical component of holistic economic development. All major corporations once began as startups, often in the founder's basement or dorm room.

Data show that Topeka-Shawnee County's small business and entrepreneurial dynamism is roughly equivalent to the benchmark counties but below state and national levels. Self-employment data is a proxy for the analysis of sole proprietorships. In Shawnee County, 3.6 percent of workers are self-employed, a figure roughly equivalent to the comparison counties but half that of the state and national levels (6.2 and 6.3 percent, respectively).

Topeka-Shawnee County fares better for firms less than ten years old. Only Minnehaha County had a higher share of its employment comprised by these firms. **The story was similar for Topeka-Shawnee County firms with 19 employees or less.** Though below state and national concentrations, Shawnee County's share of employment in small firms was greater than every comparison county except Sangamon.

**PERCENT OF TOTAL EMPLOYMENT IN FIRMS LESS THAN 10 YEARS OLD AND FIRMS WITH
UNDER 19 EMPLOYEES, Q2 2020**

Geography	Firms less than 10 years old	Firms with 19 employees or fewer
Shawnee County	13.8%	14.8%
Minnehaha County	20.1%	13.2%
Polk County	13.4%	13.0%
Sangemon County	12.6%	17.2%
Kansas	15.0%	17.1%
United States	18.1%	17.3%

Source: U.S. Census Bureau, Quarterly Workforce Indicators

What all these data mean is that Topeka-Shawnee County has comparable small business dynamics to the three comparison counties, two of which (Polk and Minnehaha) have some of the strongest economies in the Midwest. This fact offers hope that Topeka-Shawnee County can provide resources and support to small businesses to drive these numbers higher.

This is especially true for minority-owned “nonemployer” businesses (sole proprietorships). Data is only available at the metro level but they show **the Topeka MSA has the smallest per capita share of minority-owned sole proprietorships of all the comparison areas**, including almost 40 points below the national level and just over half the rate of the Des Moines and Springfield MSAs.

Supporting minority entrepreneurship is an increasingly prevalent economic development strategy in communities across the country. Currently, **the Minority and Women Business Development (MWBD) organization** overseen by GO Topeka is focused on empowering and assisting minority communities and women to start and grow local businesses.

Discussion during a Momentum 2027 focus group with small businesspeople centered around opportunities to make entrepreneurial support systems in Topeka-Shawnee County more transparent and coordinated. One participant noted that “the money is out there, the awareness is not,” adding that, “We have people who can help you navigate the current system but there’s no one asking, ‘How can we structurally realign this to make it better?’”

Prospects for innovation-driven entrepreneurship in Topeka-Shawnee County took a giant leap forward with the successful attraction of Plug and Play to the community in 2019. Founded in

Silicon Valley in 2006, Plug and Play is a self-described “innovation platform” that seeks to find, invest in, and advance startup companies at multiple stages of the enterprise cycle. This sets them apart from most accelerators who choose to invest primarily in early-stage opportunities.

Touting its location in the Animal Health Corridor, **Plug and Play Topeka targets startups in the animal health and ag tech sectors**, focusing on opportunities in alternative feed, livestock monitoring, animal health, early disease detection, drug/vaccine development, production efficiency, and sustainability. Three founding corporate partners have signed on to support Plug and Play Topeka, including Cargill, Evergy, and Hill’s.

To house Plug and Play and other entrepreneurial resources, GO Topeka announced the development of a \$14 million, 60,000 square foot Downtown Topeka innovation campus branded the **ASTRA (Animal Science, Technology, Research, and Agriculture) Innovation Center**. Eventually, the Innovation Center will house wet labs, office and meeting spaces, and a rooftop event venue. The Center will anchor a planned ASTRA District to be developed as a multi-block startup and entrepreneurial hub.

While the attraction of Plug and Play and the development of the ASTRA Innovation Center and District are potentially transformative opportunities for Topeka-Shawnee County, the full impact of these investments will only be felt if a supportive innovation ecosystem can be developed to retain startups graduating from Plug and Play and attract new firms, talent, and investment to the region.

Public and private leaders interviewed for Momentum 2027 were bullish on the prospects for Plug and Play and the Innovation Center. One leader called it a “game changer” for the community. Another said, “Plug and Play coming here is a big thing” and encouraged Topeka “to go all in on innovation with animal and ag.”

Story 4: The path to becoming a first-choice destination

Chapters:

- I. Multiple visions but one goal
- II. Perception and realities of nightlife and crime remain challenges
- III. Core strengths and new opportunities are cause for optimism

I. Multiple visions but one goal

Regardless of age, race and ethnicity, gender, place of worship, political affiliation, income, or lifestyle choice, Topeka-Shawnee County residents and champions want it to be great – to be a place successive generations are proud to call home.

The specifics of the visions to achieve that goal are as varied as the people making them; that is why holistic, collaborative change is hard. But it is instructive to explore what stakeholders would like to see in the Topeka-Shawnee County of tomorrow so the community of today can find common ground and work together to make it happen.

Many stakeholders would like to see Topeka-Shawnee County be realistic about what is possible for its future. One interviewee expressed a 20-year vision that Topeka-Shawnee County becomes “the most vibrant, desirable city in the Midwest, small-city division. We’re not going to be Kansas City nor should we try to be.”

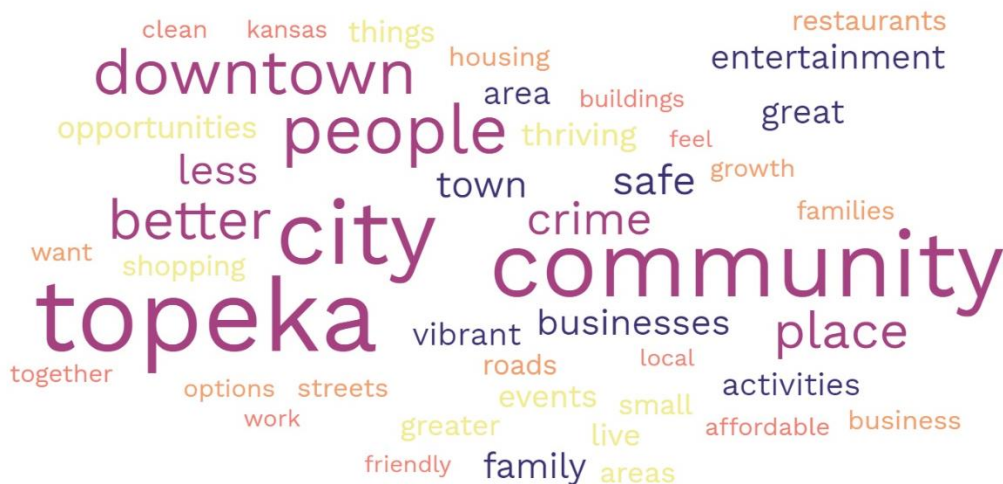
Another counseled that “we need to think carefully about what the value proposition of Topeka really is. We can’t be as good as Lawrence at being what Lawrence is... The best theorists in business strategy say the point isn’t to win and defeat all your rivals but figure out what you are and be great at that.”

Some stakeholders feel Topeka-Shawnee County should go “all in” on being a family-friendly community where you can comfortably raise your kids and have a good life. Others feel that family-friendly is too limiting. A business leader explained, “If I’m just trying to attract from the Midwest,

family friendly is okay, but I'm dependent on getting people who worked at Google. It would make it harder to get the diverse talent we need from the Googles and the top universities."

When asked to describe their vision of Topeka-Shawnee County in 2040, online survey participants focused on concepts of place and community, of being welcoming and family-friendly with a strong downtown and plenty of choices for shopping, dining, and enjoying the arts. The following “word cloud” is taken from their answers; the most commonly used terms appearing larger in the graphic.

**IN TWO SENTENCES OR LESS, DESCRIBE YOUR IDEAL VISION OF GREATER TOPEKA
IN THE YEAR 2040?**



Source: Momentum 2027 online survey; BRS

A strategic vision must also accommodate voices that may have been marginalized in the past. Commenting in public input, **representatives of Topeka-Shawnee County minority constituencies said more must be done to make the Momentum process truly inclusive of the community's full diversity.** One input participant felt that Topeka-Shawnee County's black community must unify to identify a shared vision for themselves *and* Momentum 2027.

An interviewee concurred, explaining that “people have to see themselves in (the) plan.” Another cautioned that if implementation “wins” only translate to a small group, acceptance of the plan across a broader majority of stakeholders will be lacking.

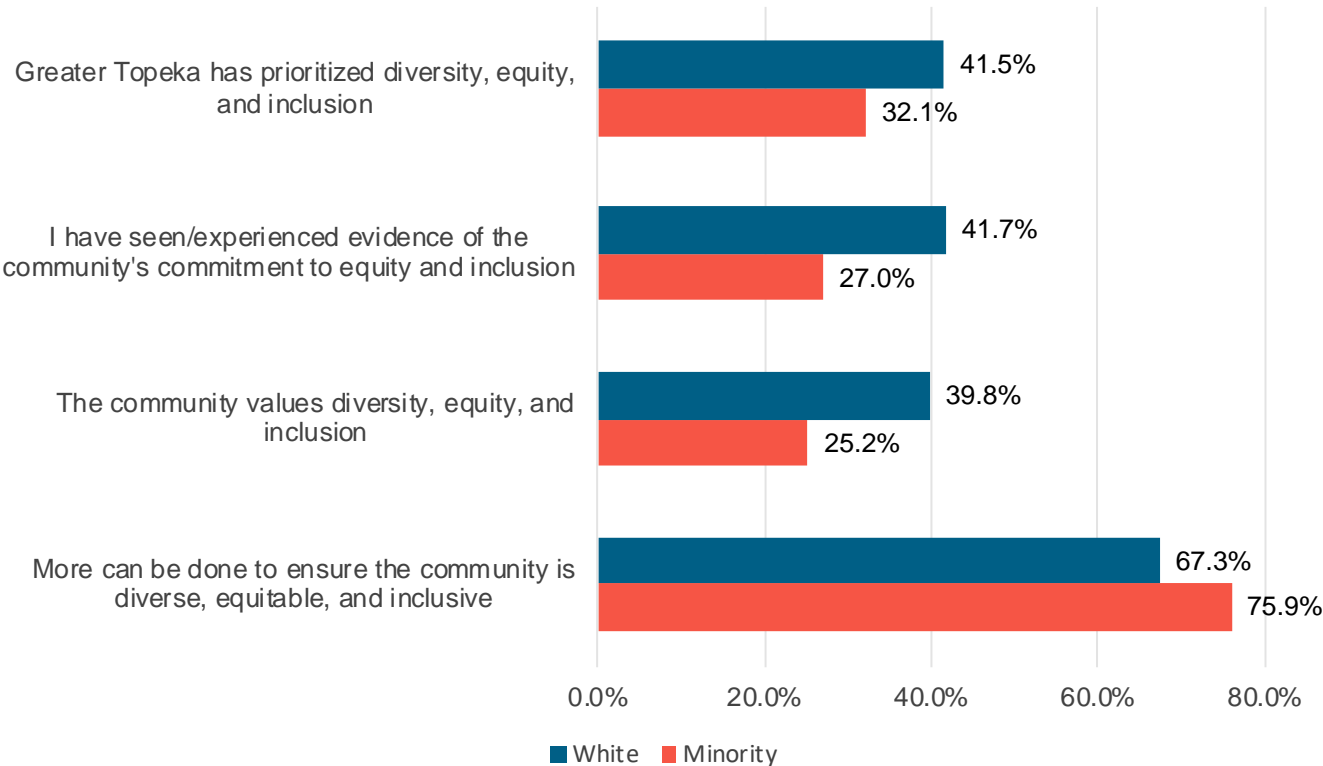
Focus group participants commended Momentum 2022 for getting leadership to talk about quality of place and what it means for equity and community institutions. However, they said a “cultural disconnect”

still limits understanding of what type of quality of place will best serve the purposes of diverse, equitable, and inclusive growth.

Other input participants spoke of the business case for diversity, equity, and inclusion priorities in strategic visioning. A business leader noted, “You need to communicate that you don’t need to fear living in Topeka if you’re different. It’s not equally easy for people to land here – you have to have that empathy... Creating an environment that is welcoming of everyone doesn’t take away from community or family values.”

Perspectives varied among Momentum 2027 online survey participants regarding Topeka-Shawnee County’s degree of openness and inclusion. White residents were more likely to agree or strongly agree that the community was an open and inclusive place compared to residents who identified as persons of color. All respondents regardless of race or ethnicity felt strongly that more could be done to ensure Topeka-Shawnee County is diverse, equitable, and inclusive.

**PLEASE RATE THE FOLLOWING STATEMENTS ABOUT OPENNESS AND INCLUSION
IN GREATER TOPEKA – PERCENT AGREE OR STRONGLY AGREE BY MINORITY STATUS**



Source: Momentum 2027 online survey; BRS
Respondents who selected “other” or “choose not to answer” were omitted

A focus group of young professionals shared their opinions about the degree to which Topeka-Shawnee County was a welcoming community. About a third of the participants were “boomerangers,” local natives who returned later to plant roots. A small number were not from Topeka-Shawnee County but agreed that peers and leaders were eager for them to get involved in local activities and engage in social and civic networks. **The group felt this openness to welcome newcomers (and returning expats) was Topeka-Shawnee County’s top selling point** and could be part of the talent attraction narrative.

Washburn University students participating in a focus group said Topeka gets a “bad rap” among the student body simply because they are not exposed to all it has to offer. One student said, “It takes you a while living here to learn about things. It’s not that students think there isn’t anything to do, they just don’t know about it.” They suggested the best way to reach them was through social media, particularly Instagram.

II. Perception and realities of nightlife and crime remain challenges

The following passage is from the September 2016 Momentum 2022 Community Assessment: “Input participants were in strong consensus that the community has a relative lack of certain amenities such as nightlife opportunities, high-end restaurants, and mixed-use neighborhoods that are densely populated with a variety of businesses.”

While quick to point out positive recent developments, **stakeholders in Momentum 2027 input also believed Topeka-Shawnee County lacked a competitive array of nightlife and entertainment options, especially for young adults without children.** Comments ranging from “still not a whole lot to do for young people” to “downtown is dead at 9pm” to “we get in our car and just say ‘let’s go to Lawrence’” were heard during public input.

The Momentum 2027 online survey asked the following question:

**WHAT IS SOMETHING YOU SEE IN ANOTHER COMMUNITY AND SAY,
"I WISH WE HAD THAT IN GREATER TOPEKA"?**

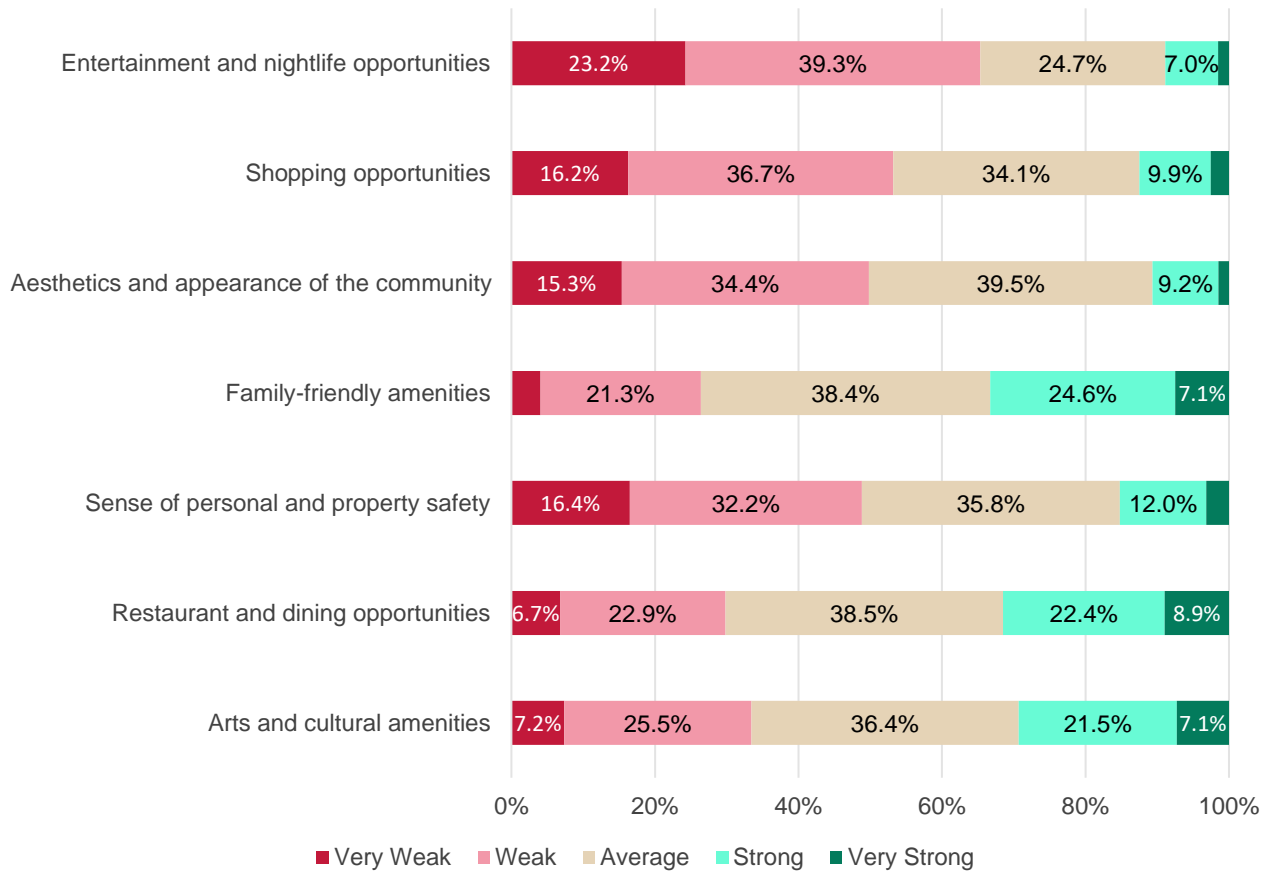


Source: Momentum 2027 online survey; BRS

The most common responses, shown larger in the previous word cloud, indicate that survey participants agree that Topeka-Shawnee County would benefit from more concentrated nightlife districts, boutique shopping and restaurants, additional concerts and events, and more options for the LGBTQ community. A greater sense of community was also a prevalent theme.

These sentiments were echoed in the survey question focused on respondents' attitudes about Topeka-Shawnee County's quality of life. While family-friendly amenities rated highly, respondents were less complimentary of arts and cultural amenities and restaurant and dining opportunities. They saved their lowest opinions for sense of personal and property safety, aesthetics, shopping, and entertainment and nightlife opportunities.

PLEASE RATE THE FOLLOWING FEATURES OF GREATER TOPEKA'S QUALITY OF LIFE*

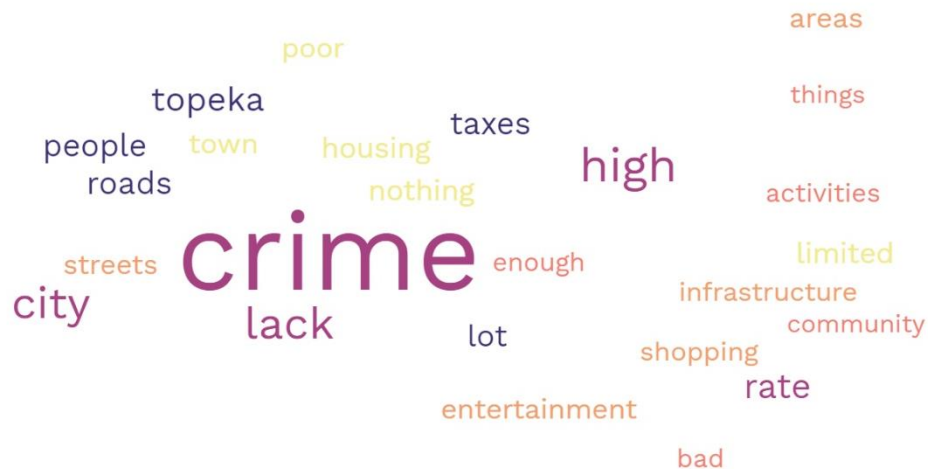


Source: Momentum 2027 online survey; BRS

*Percentage of respondents who answered "Don't Know" is not shown

Interviews, focus groups, and the online survey also confirmed that, like in 2016, **stakeholders believe that crime and community aesthetics continue to adversely affect Topeka-Shawnee County's quality of life.** The following word cloud was built from responses to a question on the Momentum 2027 online survey

IMAGINE YOU HAVE A FRIEND WHO IS CONSIDERING MOVING TO GREATER TOPEKA. WHAT ARE TWO REASONS YOU WOULD GIVE TO CONVINCE THEM THAT THEY SHOULD NOT MAKE THE MOVE?



Source: Momentum 2027 online survey; BRS

The word “crime” was used more often than any other in open-ended survey responses. Violence, blight, and the condition of streets and roads were also top of mind for survey participants.

Statistics show that rates of violent and property crime continue to be high in the City of Topeka and increased between 2014 and 2019. Historical data from the FBI’s Uniform Crime Reporting (UCR) program were only available at the city level for all the comparison communities.

Topeka had the second highest level of violent crime to Springfield in 2019 and the highest property crime rate of all the comparison cities. More concerning were greater five-year violent crime increases in Topeka than all the benchmarks and property crime increases that trailed only Sioux Falls.

CRIME RATES (PER 100K IN POPULATION), 2014-2019

Geography	2019		% Chg. 2014-2019	
	Violent	Property	Violent	Property
Topeka city	712.3	4,990.6	39.7%	1.8%
Des Moines city	712.0	4,090.5	18.6%	-3.6%
Sioux Falls city	483.2	3,045.3	9.3%	3.2%
Springfield city	777.1	4,440.8	-27.1%	-6.0%

Source: FBI, Uniform Crime Reporting (UCR) Program

Beyond the facts of crime, perception of public safety is also critical to how residents feel about their community. As one focus group participant said, “When people are picking places to start a family, they want a good safe neighborhood. They don’t want to see trash cans knocked over.”

Code enforcement has been and is a priority for city government in Topeka, but efforts can miss the mark in the eyes of some residents. A participant in a focus group explained, “We’re really good at going after folks in owner occupied houses on code violations that are superficial, like chipping paint. Houses that are boarded up belong to out of state folks.”

Some feel that the condition of Topeka-Shawnee County’s streets and roads also contributes to negative perceptions about the community. Per one interviewee, “As a city we don’t do a good job of maintaining our stuff...The difference between Lawrence and Topeka – the heavily trafficked areas in Lawrence are clean, well-maintained, and look nice.”

A group of residents concerned about the aesthetics of S.W. Topeka Boulevard in the City of Topeka took matters into their own hands. The resulting effort, Bring Back the Boulevard, was an offshoot from a Momentum 2022 work group. A leader of the effort explained, “We felt that, for a capital city, we’re lacking in aesthetically pleasing infrastructure and maintenance.”

Volunteers have mowed vacant lots, sandblasted train-bridge walls, and donated machinery to the cause. A group of residents goes out twice a month on Saturdays for a few hours to make “step by step” progress.

III. Core strengths and new opportunities are cause for optimism

There is much about Topeka-Shawnee County’s quality of life and place for residents to celebrate and promote. “Family friendly” is not just a catchphrase; stakeholders of all ages, with and without children, agree that the community’s combination of low costs, strong schools, and family-oriented amenities are a competitive advantage for Topeka-Shawnee County.

The following word cloud from online survey responses corroborates this assessment. When advocating for a hypothetical friend to move to the community, family-friendly assets rose to the top of the most frequently utilized terms.

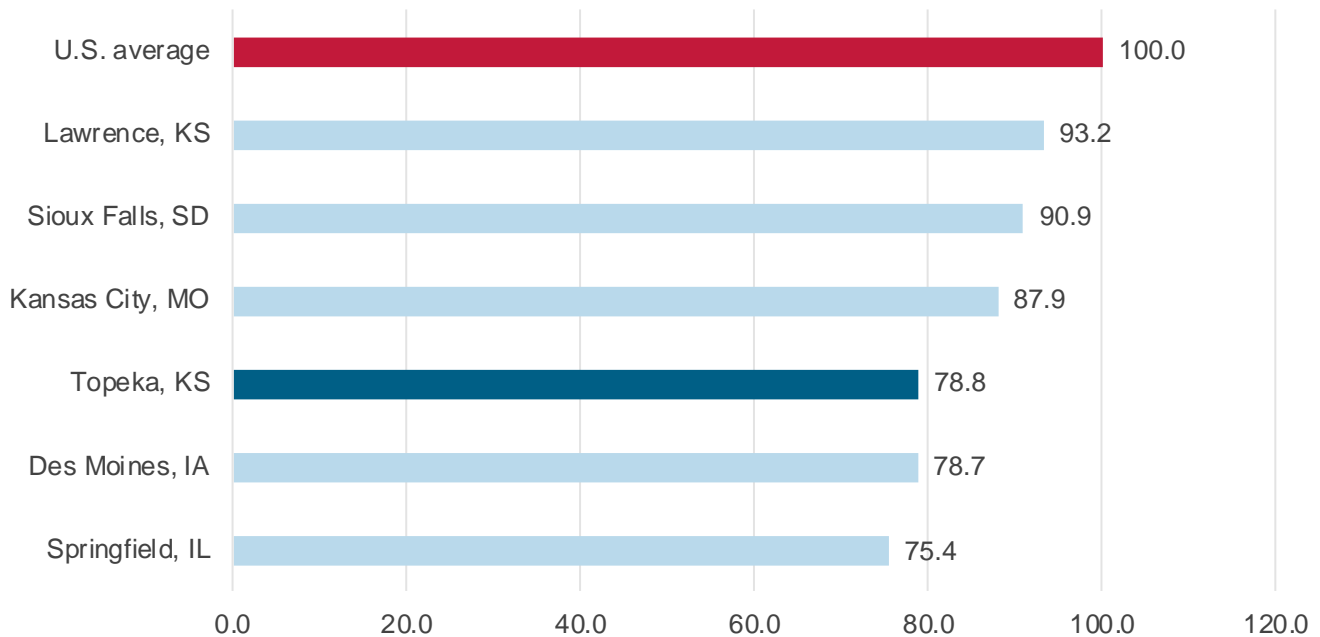
IMAGINE YOU HAVE A FRIEND WHO IS CONSIDERING MOVING TO GREATER TOPEKA. WHAT ARE TWO REASONS YOU WOULD GIVE TO CONVINCE THEM THAT THEY HAD TO MAKE THE MOVE?



Source: Momentum 2027 online survey; BRS

Data show that **the City of Topeka is cost equivalent to Des Moines and Springfield, but cheaper than Sioux Falls and the typical U.S. community.** BRS included cost of living averages for the cities of Lawrence and Kansas City because Topeka competes with them to house its local workforce. As many stakeholders noted, living costs in these markets are well above greater Topeka, which might compel some commuters to move closer to their place of employment to save money.

COST OF LIVING, 2021



Source: BestPlaces.net

Another frequently cited Topeka-Shawnee County asset is its park system, particularly Gage Park in the City of Topeka, which includes an aquatic center, carousel, theater, dog park, mini-train, and popular attractions like the Kansas Children's Discovery Center, Reinisch Rose Garden and Doran Rock Garden, and the Topeka Zoo.

The Trust for Public Land's ParkScore index highlights park access levels for nearly every city and town in the country. **ParkScore data show that the City of Topeka has the second most robust park system among the comparison areas, behind only Des Moines.** The percentage of Topeka residents within a ten-minute walk of a park is top among the benchmarks and well above the national average. The percent of Topeka land used for parks and recreation is equal to the national average and trails only Des Moines' capacity.

PARK SYSTEM DATA, 2021

Geography	% of residents within a 10-minute walk of a park	% of city land used for parks and recreation
Topeka city	71%	5%
Des Moines city	71%	12%
Sioux Falls city	64%	5%
Springfield city	44%	3%
U.S.	55%	5%

Source: Trust for Public Land, ParkScore

Topeka-Shawnee County's complement of public parks is set to be expanded after Shawnee County commissioners approved a master plan for a new destination family park in April 2021. In discussion since 2014, the park is set to be constructed near the Southwest Topeka Aquatics Park at SW 21st and Urish. Proposed amenities include a destination/fitness playground, a dog park, sledding hill, pickleball courts, an indoor activity center, driving range, and clubhouse/pro shop.⁷

The Shawnee County Parks and Recreation Strategic Plan for 2020 to 2024 recommends the development of a Master Plan for Gage Park to include the Zoo master plan and the Discovery Center. It also calls for connecting trail systems to community and regional parks whenever possible to support a county-wide trail network, including the established goal of developing 150 miles of trails throughout Topeka-Shawnee County. Currently, Shawnee County Parks and Recreation maintains 60 miles of trails, including 30 miles of paved trails and nearly 28 miles of natural surface trails.

While parks and trails are important amenities for residents and visitors, the health of a city's downtown is often the standard by which its overall quality of place vitality is measured. **Downtown Topeka has made notable strides in recent years to become a more dynamic regional destination.**

A business leader noted in public input, "Every time I go downtown it's better. We used to put visitors in Lawrence but now we can put them up in the Cyrus. The *perception* downtown is now so much better." Another admitted to being a downtown skeptic early on, but key investments "have made it a place where when you drive in you think you might want to spend some time."

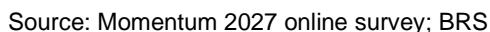
A **Downtown Market Strategy** completed in April 2019 for Downtown Topeka, Inc., concluded that downtown and NoTo have many assets, including a strong employment base and stable office market,

⁷ <https://www.ksnt.com/news/local-news/family-park-master-plan-includes-extensive-list-of-amenities/>

At the time of writing, Downtown Topeka was home to 2,000 residents in 900 housing units, with 176 planned or under construction. Approximately 23,000 people were employed in the district in nearly 7.1 million square feet of office space. All told, Downtown Topeka contained nearly 60 percent of the region's office space and 24 percent of its jobs in only 2 percent of its land area.

Under the auspices of Momentum 2022, a Destination Development Task Force has been meeting to explore ideas and priorities to enhance Topeka-Shawnee County's quality of place dynamism.

WHAT ADDITIONS OR IMPROVEMENTS WOULD YOU MOST LIKE TO SEE IN DOWNTOWN TOPEKA?



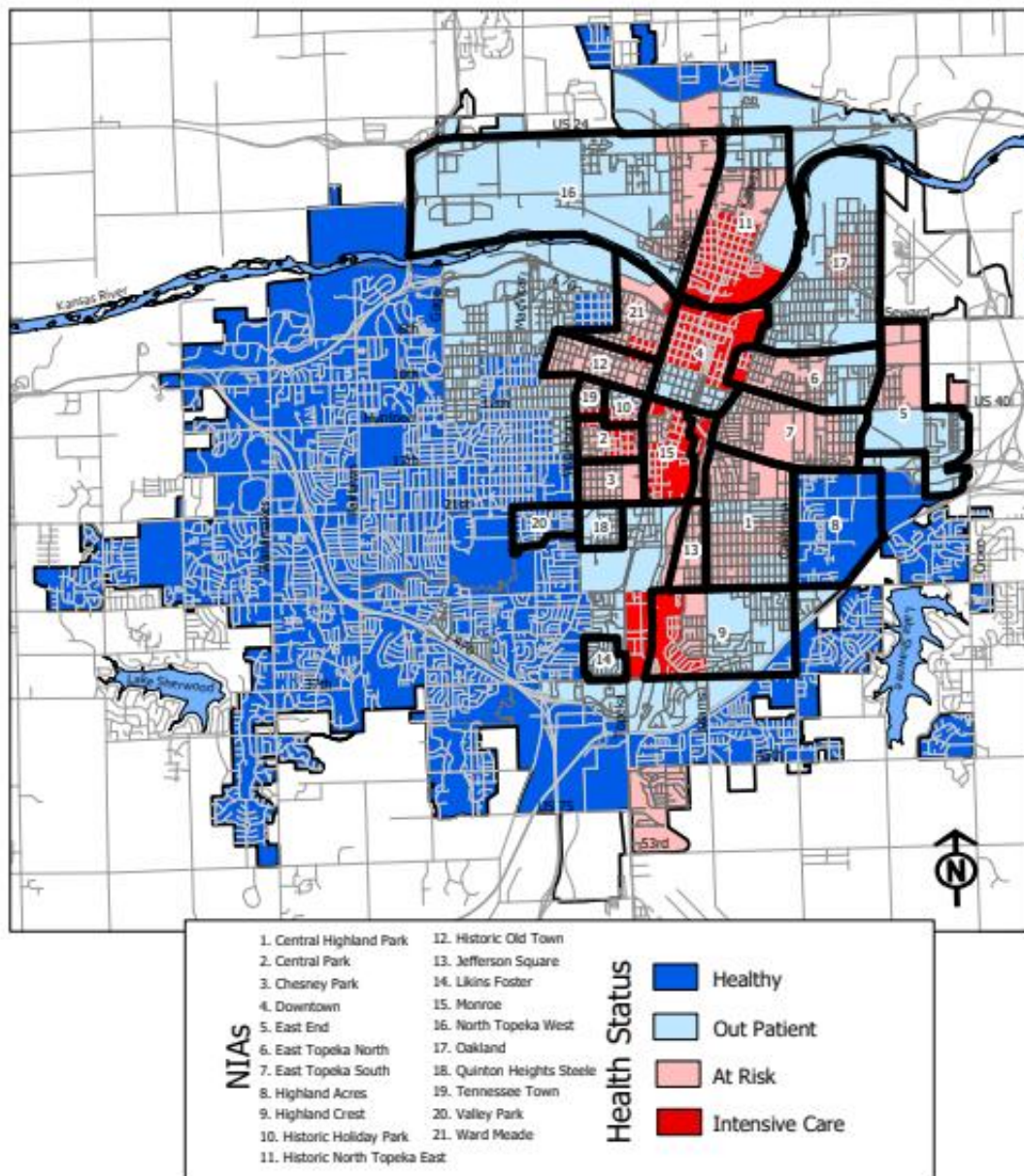
TOPEKA-SHAWNEE COUNTY MOMENTUM 2027

districts. A city official said that, although citywide revitalization “is on an upward trend,” investment over the decades “hasn’t been equal across the city.” One explanation for this could be the way the City of Topeka’s neighborhood improvement programs are designed. As currently configured, they act as “triage” to stabilize neighborhoods on the cusp of blight. Eligibility for planning and funding is determined by a classification system diagnosing neighborhoods as either Healthy, Out Patient, At Risk, or Intensive Care (see map on following page).

The city’s principal neighborhood improvement program is called S.O.R.T. (Stages of Resource Targeting), which is designed to increase quality of life through public infrastructure and affordable housing investment in “Intensive Care” and “At Risk” neighborhoods in Topeka. Funding awards are competitive, so there are no guarantees every neighborhood in need will receive grants.

One challenge with the SORT program, a city official acknowledged, is that most Neighborhood Improvement Associations (NAIs) are not equipped to take a plan and run with it after Stages I and II of the process. Despite ongoing support from the city in Stage III, “The expectations of what a neighborhood can do on its own are pretty low. The program gets a lot of criticism, but the goals of the plan are really hard to fulfill.”

CITY OF TOPEKA NEIGHBORHOOD HEALTH MAP, 2020



Source: City of Topeka

SORT faces an uncertain future as some advocates believe a new tool could provide neighborhood groups better access to government and more regular community investment. One potential replacement is the **Topeka Neighborhood Dreams Fund**, a program that provides small monetary awards, technical assistance, and other support to neighborhood groups to take local action on a public concern.

A complementary tool to SORT is the City of Topeka's **Neighborhood Revitalization Program** which offers property tax rebates to stimulate investment in Intensive Care and At Risk neighborhoods. From

1995 to 2016 the city rebated approximately \$43.3 million dollars which stimulated over \$432 million in private investment. According to a public official, “The city has done a lot of work to stabilize areas but maybe it’s okay to move into areas less on the cusp and more in full fledged blight. Or maybe seed multiple areas every year as opposed to one.”

Key quality of place and quality of life opportunities in the City of Topeka were identified as low-hanging fruit for attention in Momentum 2027. These include:

- **Redevelopment of the White Lakes Mall** which, according to one stakeholder, “has become an eyesore from what was once an asset. It could be a game changer if you come up with the right plan.” Topeka’s mayor and city council voted 10-0 in September 2021 to authorize up to \$2.5 million to demolish the mall and clear the site so the city can sell the property to a potential developer.
- The **Kansas Riverfront**, which, according to the 2019 Downtown Market Study, “acts as a barrier rather than the asset it can become in the future.” A volunteer Riverfront Advisory Council has been meeting to determine strategic priorities, including spurring recreational activity and working to connect future riverfront property to the downtown Topeka corridor and other nearby developments. An issue that had previously held up Kansas River efforts is close to being resolved as a new weir, currently under construction, should make future activity on the river much safer. Not all local leaders are bullish on prospects for the Kansas River. Some feel that more must be accomplished before it is development ready, while others believe volunteer leadership will not be enough to move efforts forward without full-time staff.
- **Improved infrastructure for youth sports**, which one leader called a “no-brainer.” Stakeholders reported driving all over eastern Kansas and western Missouri to take their children to tournaments, with most saying they have “never” attended one in greater Topeka. The leader advised that, “We need to be thoughtful on where we can compete and what we want to be the best in.” Another interviewee noted that “the lack of youth sports drags a ton of money away from the community. We’ll spend a whole Saturday in the Kansas City suburbs.”

Next Steps

This Competitive Assessment presents narratives that tell a story of Topeka-Shawnee County's recent economic and demographic trends, current competitive issues, and potential opportunities to continue recent momentum into the next five-year strategic plan, Momentum 2027.

Broad Ripple Strategies and Arrowhead Consulting will work with the project Steering Committee to confirm the strategic priorities that will enable Topeka Shawnee-County to effectively maintain and enhance the progress from Momentum 2022.

A shared commitment from all local constituencies to address the challenges and capitalize on the opportunities identified in this report will be necessary to truly make Topeka-Shawnee County a first-choice destination for companies and talent.

Appendix A: Momentum 2022 Implementation Evaluation

When the Momentum 2022 process began in the summer of 2016, it was not even called Momentum. What started as the Topeka-Shawnee County Holistic Economic Development Strategy evolved into a comprehensive, ambitious, five-year vision plan that challenged stakeholders to come together in new ways to address issues that some believed threatened the very future of community.

Fast-forward to 2021 and Momentum 2022 has been woven into the fabric of Topeka-Shawnee County, with public and private leaders and citizens alike speaking of the initiative as a bellwether for a new attitude towards change in the community. While this sentiment is not universally shared, the degree to which the process has entered the public consciousness is unique based on the experience of BRS' principals.

The establishment of the Greater Topeka Partnership to oversee economic development in Topeka-Shawnee County and administer Momentum 2022 on behalf of the community was also a major accomplishment, with formerly siloed operations now unified under a common umbrella. As one leader said about the establishment of the Partnership, "I'm not sure people understand the full impact of this on our community. It brought us together in a real way. We're now united by this team."

After an unforeseen pause in Momentum 2022 activities due to the global Covid-19 pandemic, the process has again ramped up, albeit with more judicious use of volunteers' time than prior to the break.

Leaders who participated in the process explained that a broad-based Steering Committee was important to Momentum 2022's success. Organizers "went out of their way to determine who should serve," said one volunteer, adding that the process' commitment to communications was important... We learned that there's not one perfect way to do it. An integrated approach is best. We also found out how important social media is."

The use of social media also highlighted one of Momentum 2022's challenges, according to the volunteer, who is white. "Our more underserved populations are not big social media consumers. Two-way communication is still important, especially for the African-American community. The needs are even broader in the Hispanic community in terms of getting traction."

Another leader engaged in both Momentum 2022 development and implementation said the process represented a new level of cross-disciplinary engagement for Topeka-Shawnee County. "The most

important convening was to get people to the table to talk about the future of (Topeka-Shawnee County). To work across boundaries and come together to address tough problems. We had some conversations we hadn't had before around economic development, diversity and inclusion, education, and healthcare." Critically, the leader said, "It's just as, or even more important for Momentum 2027 that everyone feels like they have a seat at the table"

Strong start, notable progress

A local business leader summed up the launch of Momentum 2022 as a "great start. We were knocking stuff out left and right – downtown vibrancy, positivity, and momentum. Then the pandemic put everything on hold and we had to focus on local business... Now we're trying to finish the initial strategies and decide what's next."

GTP estimates that about 70 percent of the of the goals set forth in Momentum 2022 have been completed. Highlights of the strategy's accomplishment were profiled in the Topeka Capital-Journal.

Washburn Tech East, which opened last year, was created as part of the "develop homegrown talent" initiative, to provide adults opportunities for continuing education and technical training. Development of Topeka's downtown has sought to create an attractive "dynamic core" in the capital city. Rehabilitation of areas like Wheatfield Village and creation of downtown's Evergy Plaza reflect the strategy's goal of "improving quality of place." The Choose Topeka incentive program demonstrates a commitment to attracting and retaining talent and promoting a positive image of the city. And Topeka's partnership with Silicon Valley-based Plug and Play, which was announced last year, addresses the community's need to "enhance its entrepreneurial ecosystem."⁸

The Greater Topeka Partnership published regular quantitative updates on implementation progress through a series of scorecards posted on the Momentum 2022 page of the organization's website. A comprehensive range of metrics were tracked across the full breadth of the strategy's goals and objectives.

Many of these indicators are also profiled in this Competitive Assessment. Allowing for data lag that prevents current measurement for certain trends, most data tracked by GTP showed improvement in the initial years of Momentum 2022 implementation. The gains found most notable by stakeholder input participants were the increases in the NPS score and average annual incomes.

⁸ <https://www.cjonline.com/story/news/local/2020/08/22/topekans-look-to-regain-momentum/114886192/>

Pandemic interruption and recalibration

As was explained in the body of the Competitive Assessment report, Momentum 2022 implementation was paused in 2020 to focus on the needs of existing businesses struggling to survive pandemic slowdowns. Covid-19 impacts also brought to light the urgency of some issues that had already been on the radar of local officials and community members, including digital equity, that will now have greater emphasis as the Momentum process continues.

The pandemic pause and subsequent restart of Momentum 2022 activities also allowed for a reassessment of the role of implementation volunteers. Surveys and outreach to the community enabled the Greater Topeka Partnership to get a better sense of how to structure and manage the participation of leaders and practitioners volunteering on strategic work groups focused on talent development, quality of place, innovation and entrepreneurship, development of a dynamic core, and community pride and service.

One work group volunteer said, “I liked that it was casting a net to anyone who wanted a voice in the process,” but found the number of meetings “a little overwhelming for me.”

A leader involved in Momentum 2022 implementation called the engagement of the work groups uneven. “As much as we tried to bring them into ownership of the strategic plan, there were sub-cultures of the work groups that tangent and have passions outside the dynamics of the plan.”

The decision was made to pare down the volunteer structure by cutting back the number of work groups and participants to make the process less unwieldy. While this has succeeded in better utilizing the time and efforts of volunteers, Momentum 2022 leaders also want to ensure partners can be reengaged if necessary as implementation continues.

Not all local residents felt included in Momentum 2022

Interviews with multiple leaders of Topeka-Shawnee County’s Black and Hispanic communities highlighted challenges integrating all voices into the Momentum 2020 process.

A Momentum 2020 participant of color said, “The broad minority community has no clue what Momentum 2022 is.” Some who were engaged said they were solicited for their expertise and ideas but weren’t asked to be part of implementation or were brought to the table later in the process. Other participants noted that diverse voices were asked to come to work group meetings but then told there was no funding to carry out their initiatives.

According to certain Black and Latino leaders, many of the city's minority residents "don't believe anything will change" due to long-standing issues like education and wage gaps that have drawn attention but few solutions. One interviewee noted, "When push comes to shove, nothing ever happens."

Other minority leaders had a positive experience with Momentum 2022. One volunteer's work group and Steering Committee membership were called good experiences, with the volunteer's involvement well regarded and valued.

In the future, minority leaders would like more clarity for participants of color about funding availability and follow-through for issues important to minority communities. They also said more trust could be built with underrepresented communities by holding meetings in the evenings and on weekends and soliciting local voices to help plan agendas.

Lessons for Momentum 2027

A benefit of nearly five years of implementation experience is how it can be applied to planning and execution of Momentum 2027.

Local leaders feel that community engagement can be even more diverse and inclusive from strategic development through implementation but with better parameters on volunteers' engagement, including projected length of commitment and more discreet objectives and priorities spelled out during initial meetings. The Steering Committee must also feel greater ownership over the plan, according to one member of the Momentum 2022 group, citing the positive impact the Bloomberg Harvard City Leadership Initiative had on the members' commitment to the plan and its principles.

Ultimately, as one leader commented, "We have to be cognizant of what we learned from Momentum 2022. We've gotten a lot of feedback and information from the community. Building on what we've done makes sense – I think people are ready for something bigger."