

Dear San Antonio,

How do you change a city? You ask the people there what matters to them. You listen. You plan. And then you move—together.

San Antonio is the only large city in the United States that has a community vision developed by the people who call our city home, a nonprofit organization responsible for driving progress toward that vision, and more than 160 multi-sector partner organizations actively aligning to that vision.

This coordination is essential because Community Results cannot be achieved by one organization working alone. This coordination also reflects the shared responsibility envisioned by the community eight years ago under Family Well-Being:



The entire community—individuals, businesses, local government, nonprofits, and faith-based organizations—takes responsibility for our collective well-being...

Today, we know 70% of the community indicators we track to measure success on our shared vision are moving in the right direction. We also know that we have more work to do.

This report, delivered annually, is part of SA2020's organizational strategy to redesign, and even disrupt, the way results are achieved. We do this, in part, by telling San Antonio's story—the whole story.

The story that shows we are one of the top cities for college-educated millennial growth and number one in income segregation. The story that shows our tech industry is booming and our underemployment rate remains flat, well below our goal. The story that shows that we will double our population in the next 20 years and over one-third of our current population is burdened by housing costs.

At SA2020, we celebrate our collective successes and we highlight our shared challenges. We are committed to holding the community accountable to making progress toward our shared goals. We ask funders to replace transactions to nonprofits with strategic partnerships that improve people's lives. We elevate complex community challenges that touch all Cause Areas: internet access that allows our students to apply for college without additional barriers; complete streets that help our families get to school and work safely by walking, riding, or wheeling as they need; neighborhood development that allows for mixed-income housing that won't displace our neighbors.

Thank you for reading this report and making a commitment to learn even more about San Antonio. By transparently reporting on San Antonio's progress toward our shared vision, the entire community is able to see where we are making strides and where we are falling short, always able to advocate for and lead change. At SA2020, we believe everyone is capable of affecting change, including you.

Let's do this!

Rvan T. Kuhl

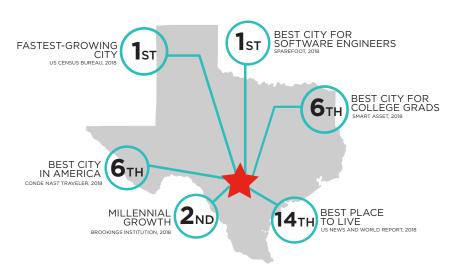
Chair, Board of Directors, SA2020

President & CEO, SA2020



HOW TO READ THIS REPORT

Together, we envisioned a stronger San Antonio where students are provided quality educational opportunities no matter where they live, and economic prosperity is available to anyone in our community because of workforce development efforts and job potential. And we want connected neighborhoods where our families thrive and our residents are healthy. This future was not envisioned for just some in our community, but for everyone in our city.



IN INCOME SEGREGATION CITYLAB, 2014 MUNICIPAL VOTER TURNOUT CITY OF SAN ANTONIO, 2017 SEGREGATION 1 IN 6 POVERTY US CENSUS, 2017 35% 25+ WITH ASSOCIATES DEGREE OR HIGHER US CENSUS, 2017

Today, this is San Antonio.

Sixty-six people are born in or move to our city every day. In fact, we'll nearly double in size by the year 2040. San Antonio is a city of artists and innovators, and of rich culture and history. In our downtown, we just saw an investment of \$57 million in a local university that includes building a school of data science. San Antonio is second in cybersecurity—only after Washington DC, which is all right with us, really—and our unemployment rate is now under four percent. San Antonio is one of the top cities for collegeeducated millennial growth. And we worked together to make these things happen.

This is also San Antonio.

We are one of the leading cities for income segregation. Residents on one side of town have a shorter lifespan—by more than 20 years—than residents on another, more affluent side of our city. In addition to income and geography, race is a predictor of our community's outcomes. In San Antonio, more than one-third of our residents are burdened by housing costs, and one in six people—one in five children—live in poverty. Still, there are people in our community actively working to change these things. Together.

Change doesn't come without understanding how policies and services have historically neglected low-income communities and communities of color. In order to affect change, San Antonio must take collective responsibility for advancing community results. Change happens when we acknowledge and agree to address root causes of our community's greatest challenges. And if these challenges seem complex and big, they are. And yet...we each have the ability to affect change.

That said, to simply read this report as merely gauging "up" or "down" movement on community indicators, misses the full story of our community's collaborative progress and collective efforts to date.

As you read, pay attention to how the 11 Cause Areas are all related and how the success of one can impact another. How incremental change in arts education, for example, can pay dividends in economic development; how an understanding of housing affordability can influence policy changes in educational attainment; and how park access can stimulate better health outcomes.

Flip to a Cause Area that's most important to you. As you read through the Community Indicators, we ask you to also incorporate the Impact Narratives, which will paint a broader understanding of the connection between Cause Areas. Once you reach the City of San Antonio profiles, with 20 data points specific to approximated Council Districts, complement your understanding with the corresponding Cause Area sections.

Further still, in our first ever Nonprofit Partner Impact Summary, you can find a local nonprofit organization that may provide you an opportunity to move the needle on the areas that are most important to you through board service, volunteerism, and philanthropic giving.

As you read this report, we invite you to **be curious**. Ask yourself: "Why is this indicator moving?" "Why is this Cause Area lagging?" "Why do we care about this?" "What am I doing to help move the needle?" "What current programs and policies could be shifted to account for different histories and needs of our communities?" Then, we urge you to take action:

- Become an SA2020 Partner. We partner with nonprofits, foundations, government, corporations, public institutions, higher education institutions, and member or trade organizations. SA2020.org/get-involved
- Mark your calendars for May 4, 2019—Election Day—and vote. Last day to register to vote for this municipal election will be April 4, 2019. ilovesanantonio.org
- Connect to SA2020 Nonprofit Partners and volunteer your time. SA2020.org/partners
- Apply to serve on a city board or commission. sanantonio.gov/Clerk/Legislative/BoardsCommissions
- Give to SA2020 Nonprofit Partners. SA2020.org/partners
- 6 Connect to SA2020 year-round by joining our Community Circles. bit.ly/SA2020circles
- Participate in The Big Give on March 29, 2019. TheBigGiveSA.org

Met & Exceeded	On Track	Progress	Flat/Getting Worse
The SA2020 target has already been reached!	We're making progress at a pace that will lead us to achieve the SA2020 target!	We're moving in the right direction, but not moving rapidly enough to achieve the SA2020 target.	We're seeing no progress, and in some cases even moving in the wrong direction.





In 2020, Downtown is the heart of San Antonio and is everyone's neighborhood.

It is a showcase for visitors, a center of vibrant activity for residents to live, work and play, and an economically inviting locale for businesses to flourish. Downtown's historic buildings and character are preserved, its parks and green spaces are inviting, and the river continues to be treasured as its defining asset.



DOWNTOWN DEVELOPMENT



INDICATOR SNAPSHOT		
₹	Increase Downtown Housing Units	
	Increase Greater Downtown Area Population	
	Reduce Downtown Crime Rates	
	Increase Downtown Employment	
	Improve Downtown Economic Impact	

13%
of SA2020
Nonprofit Partners
impact
Downtown
Development



Increase Downtown Housing Units

Goal: Increase new housing units by 7,500

Goal Quantified	Baseline (2011)	Update (2017)
10,804 new units	3,304	10,321

Source: City of San Antonio, Center City Development & Operations Department (CCDO)

While San Antonio has made steady progress in increasing downtown housing units in the Greater Downtown Area and is on track to meet the goal of 7,500 new housing units in the downtown area by 2020, the number of housing units remained steady at 10,321 units total. This includes 3,304 baseline units plus 7,017 new units, or 94% of the goal. Of the 7,017 new units, 3,360 are complete, 1,994 are under construction, and 1,663 are in the planning stages.



Increase Greater Downtown Area Population

Goal: Increase number of greater downtown residents by 15%

Goal Quantified	Baseline (2013)	Update (2017)
27,093 residents	23,559	23,180

Source: US Census Bureau

This year, the source for this indicator was switched to US Census Bureau American Community Survey in an effort to provide a consistent, reliable measure. This provides an estimate of greater downtown residents. As such, it appears as though the downtown area population is decreasing, but taking margins of error into account shows that the population has remained relatively flat. Because we're using the five-year estimates for these small geographic areas, the most recent population estimate is from 2013-2017, so efforts to increase population over the last two years are not necessarily captured in this measure yet.



Reduce Downtown Crime Rates

Goal: Decrease crime rate by 50%

Goal Quantified	Baseline (2011)	Update (2017)
1,420	2,840	2,167

Source: San Antonio Police Department (SAPD)

The downtown crime rate seemed to mirror the crime rate of San Antonio: a spike in 2016 and back down in 2017. Downtown Crime Rate is similar to the FBI's Universal Crime Rate (UCR), but not exact. UCR includes: Criminal homicide, Forcible/Legacy rape, Robbery, Aggravated assault, Burglary, Larceny, Motor vehicle theft, and Arson. SAPD reports Downtown crime using the Centro Public Improvement District not the Greater Downtown Area as defined by the City's Center City Development & Operations Office.



Increase Downtown Employment

Goal: Increase downtown employment by 25%

Goal Quantified	Baseline (2012)	Update (2015)
65,621	52,497	70,511

Source: City of San Antonio, Center City Development & Operations Department (CCDO)

The City of San Antonio's Center City Development & Operations Office contracts a report for employment and economic impact for the Greater Downtown Area. The update here reflects the last report in 2015. This report is slated to be completed in 2019. Another study, completed by the International Downtown Association in 2017, revealed the downtown employment population at 73,663 which is 9% of the share of the entire City. This equates to a 57% growth since 2010 based on this study. Currently, downtown has 8 million square feet of office space, 4 million square feet of retail space, and 14,114 hotel rooms. It's important to note the study used an expanded definition of the commercial downtown beyond the boundaries of the business improvement district as geographic parameters vary across data sources and may not align with the Greater Downtown Area as currently defined.



Improve Downtown Economic Impact

Goal: Increase downtown economic impact by 5% annually

Goal Quantified	Baseline (2012)	Update (2015)
\$14,410,542,605	\$9,753,622,463	\$14,805,627,944

Source: City of San Antonio, Center City Development & Operations Department (CCDO)

The City of San Antonio's Center City Development & Operations Office contracts a report for employment and economic impact for the Greater Downtown Area. The update here reflects the last report in 2015. This report is slated to be completed in 2019. Another study, completed by the International Downtown Association in 2017, revealed the 1.4 square miles of Downtown San Antonio had an assessed land value of at \$3.7 billion with an estimated public and private investment attraction of \$2.5 billion over the next few years. Retail sales show annual spending at \$1.1 billion, which is 5% share of the City with a low retail vacancy rate of 2.1% compared to 4.3% for the rest of the City.



UTSA EXPANSION

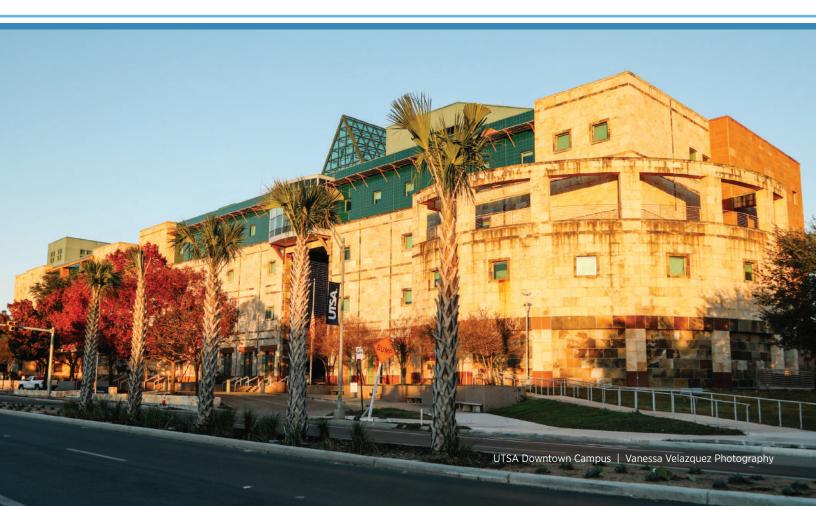
DOWNTOWN DEVELOPMENT

The University of Texas at San Antonio (UTSA) plans to increase enrollment at their Downtown Campus from about 4,000 students to 15,000 over the next 10 years, adding a School of Data Science, a School of Entrepreneurship, a National Security Collaboration Center, an Urban Education Institute, and an Urban Science Institute. The new facilities will support the high-demand job opportunities of target industries. In fact, UTSA is already home to the country's top cybersecurity program.

"It is my intent to realize the full potential of what a campus can offer the community in all of its facets—especially around learning, knowledge generation, and getting a degree that allows you to remain here and have a fair wage," said UTSA President Taylor Eighmy. According to the SA2020 City Dividend, just a one percent increase in college-educated San Antonians—about 14,184 students—will lead to \$1.4 billion increase in total income in the San Antonio metro region.

Opened in 1997, UTSA's Downtown Campus recently celebrated its 20-year anniversary. The expansion will allow the university to further foster multi-sector partnerships and spur innovation towards student success. "We actually have a lot of vibrant connections to all of those components and partners already, but there's nothing like co-location," explained Taylor. (Read more about partnerships with industry leaders to develop homegrown talent in the Education section of this report.)

"We are dramatically reinventing our university..."





A \$15 million gift from business leader Graham Weston, his largest personal gift ever, will help make UTSA's expansion possible. Phase one of the 10-year plan includes two and a half acres at the intersection of South Santa Rosa and Dolorosa Streets and one acre on Dolorosa near South Flores Street. The second phase will focus on expanding further into the near West Side. At the recent CityFest panel on the Decade of Downtown, Weston Urban CEO Randy Smith commented on the importance of students: "Backpacks are essential for an urban core."

Downtown will continue to grow around the campus: from the opening of Frost Tower to the relocation of USAA and Bank of America headquarters, the increase in coworking spaces offered by Geekdom and WeWork, the completion of Hemisfair and the San Pedro Creek Culture Project, and the renovation of Alameda Theater and Alamo Plaza.

Around the country, cities are similarly leveraging institutions of higher education to transform their downtowns. Fifteen thousand students and thousands more faculty and staff in Downtown San Antonio, for example, will quickly demand complete streets, parks, local businesses, internships, jobs, and affordable housing. UTSA's expansion holds the potential to shift the incentivization of downtown development to respond to the needs of San Antonians and our future talent.

Taylor is talking with the community, learning about previous effects of development, and taking steps to incorporate feedback and heed concerns. Expanding downtown and providing greater opportunity for young people "is very important, but I do not want this to happen at the expense of any neighborhood or any cultural fabric that's essential to the future of the city as well." The university plans to do a socio-economic impact study to "benchmark" property values and tax rates.

"We are dramatically reinventing our university, and we very much want it to be the university of the future as much as San Antonio is the city of the future," added Taylor.



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