Onward Towards Equity

The Rebirth of Partnership for Southern Equity
On behalf of the partnership for Southern Equity (PSE) and our partners, I thank you for investing your time and resources in striving toward equity as a key to Atlanta's destiny, an idea that is getting traction and gaining ground.

After seven years on the frontlines of this nascent movement, PSE is evolving and, therefore, accelerating its momentum as a catalyst for equitable social change here in metropolitan Atlanta and across the American South.

Following an exhaustive process, we are unveiling PSE’s “Strategic Growth Plan 2017-2020,” a document deeply rooted in our vision and values. Over the next several pages, we will introduce you to PSE’s actionable road map, which outlines the direction we are taking and the goals we aspire to reach within the next three years.

Before shifting your attention to PSE’s future, I ask you to briefly reflect on PSE’s humble beginnings.

In 2009, 22 civic and economic leaders from Atlanta attended PolicyLink’s national Equity Summit in New Orleans. As we shared experiences with colleagues from around the country, our delegation was reminded of the long and bowed pathway to racial justice. Our deliberations soon produced a collective call to action: By leveraging and honoring Atlanta’s rich civil rights legacy, we will transform the capital of the “New South” into a beacon of progress for the southern U.S.

This bonding experience, inspired by Atlanta’s economic downturn and an abiding love for my hometown, led to the formation of Equity Atlanta (EA), a loose network of like-minded organizations. In 2011, EA blossomed into a standalone entity and PSE was born.

Since then, PSE has become known for leading edge research and forging deep relationships with diverse stakeholders. Today, PSE is a leading voice for equity in the American South by virtue of our work in multiple fronts: transportation, energy, land use and economic inclusion.

Endowed with the trust and respect of community, business and policymaking leaders alike, our strategic growth plan looks inward and focuses on building PSE’s organizational infrastructure. First and foremost, we will grow our staff to 25 by 2020 to maximize our programs. PSE will nurture and expand its Board of Directors; retaining essential leadership while recruiting competent leaders to fill key areas. We will expand PSE’s research unit to strengthen our case for equity as the superior alternative. We will assemble a dynamic, in-house communications team to amplify our ideas, and our growth model. We will assemble a dynamic, in-house communications team to amplify our ideas, and our growth model.

Going forward, PSE will apply rigorous, objective and empirical methods to score program performance and efficacy in three signature areas:

- **Just Energy** - Against the backdrop of global climate change, “energy equity” translates into the fair distribution of benefits and burdens from energy production and consumption. PSE is working with its partners to educate low-income, communities of color about the sourcing and commodification of power generation in Georgia. While unfamiliar to many residents, those policies significantly impact household utility bills and impinge on the overall quality of air, water and other natural resources that affect our health and well-being.

- **Just Growth** - A powerful and proven community engagement platform for residents of all races, incomes and backgrounds to influence decision-making about housing and retail development, infrastructure and transportation projects that impact them. The impetus for this effort was the creation of PSE’s Metro Atlanta Equity Atlas (MAEA), which offers a digital, data-rich and accessible resource that can be used to create a fairer, more equitable region.

- **Just Opportunity** - Many communities of color in the South are still reeling from the Great Recession while those occupying the capitals of power are ignorant or indifferent to their plight. PSE is focused on economic inclusion that promotes and increases equity in the distribution of income, wealth building, employment and entrepreneurship among vulnerable populations.

While proud of these accomplishments, PSE is not resting on its laurels and finding innovative ways to, “measure the movement” for our stakeholders and partners.

“PSE is a transformational leader not only in Atlanta but the American South. PSE has become a catalyst for moving an equity agenda that disrupts historical and present-day injustice, generates inclusive solutions, and educates us in the process. I love what they are doing and looking forward to the future.”—Tene’ Traylor, Fund Advisor for Atlanta, The Kendeda Fund
Emphasizing PSE’s role as a principal architect of metro Atlanta’s equity ecosystem enables the organization to better communicate its mission to a broader audience and educate constituents about its hallmark approach to community-building consisting of:

- Connecting vulnerable populations to solutions that empower communities
- Informing decision-makers and communities on inclusive growth and development opportunities
- Impacting development and business investment to promote inclusiveness, quality growth and regional competitiveness
- Growing a multi-generational cadre of equity leaders and policy innovators

Serving as the organization’s spokesman and as a lightning rod for Atlanta’s equity agenda, our Chief Equity Officer (CEqO)/Founder garners overwhelmingly favorable coverage from local and national media. Moving into the next phase of PSE’s growth cycle, the organization is pro-actively establishing a distinct institutional identity that further underscores the relevance of its work and burnishes its brand in metro Atlanta and beyond.

As PSE’s transformative story unfolds, we are investing in dynamic communications tools and resources to share, and then replicate the Atlanta model in every community clamoring for equity and social justice. To do so, we are creating and fostering a purpose-driven culture of learning and leadership development within the organization itself.

Initially, PSE is staffing up for the following positions:

- Executive Assistant to the CEqO
- Vice-President of Operations
- Operations Manager
- Communications Manager

In addition to providing much-needed bandwidth, these foundational hires will shape PSE from top-to-bottom and become the backbone of the operation. To ease the transition, the first wave of employees will be supported by a contingent of longstanding consultants who are knowledgeable about PSE’s work. Over the next three years, PSE envisions having 25 full-time positions, as funding becomes available.

Selecting the best and brightest candidates to join us on our journey represents a major step in PSE’s strategic growth. Once on the job, part of their workload will entail shaping PSE’s institutional culture and modeling our values in real-time for future colleagues and external partners and stakeholders.

The work of each PSE staff member will be evaluated based on a set of predetermined milestones individualized for their respective roles within the organization. The employees’ milestones reflect key indicators linked to PSE’s overall health and will stand as guideposts to inform the decision-making process for the board of directors and executive leadership.

“PSE has been tireless, persistent and not afraid to be the lone and dissenting voice in critical civic conversations to make sure those without access are having their perspectives included.”
—Doug Hooker, Executive Director, Atlanta Regional Commission

“PSE is working across boundaries with institutional partners, elected officials and on the front lines with grassroots organizers to bring diverse stakeholders together. PSE leads with its values and is not afraid to lead on the toughest, most complex issues in our region.”
—Chris Appleton, Executive Director, WonderRoot
ESTABLISHING STRONG SYSTEMS

PSE has proven that it is “built for speed” by nimbly and thoughtfully responding to crucial equity issues whenever they arise. By establishing strong operational systems, financial management practices and human resources procedures, as set forth in our strategic growth plan, PSE is also “built to last.”

With several major initiatives already underway, instituting new systems, policies and procedures is the equivalent of “building the plane while it’s flying.” With so many moving parts in play, putting the requisite internal structures in place is admittedly challenging, but is indicative of PSE’s clear-eyed leadership and institutional values.

Anticipating the planned expansion of our employee headcount, PSE’s human resources support will hone in on staff training and development consistent with industry best practices and in compliance with applicable labor laws and regulations. Under the direction of the Vice-President of Operations, our HR capacity will enable us to:

- Develop a performance management and professional development plan
- Develop HR policies in conjunction with the board and chief executive
- Produce an employee manual and new employee packet
- Produce job descriptions for all positions
- Produce a comprehensive benefits package

Upgrading technology and locating permanent PSE office space also rank high on the list of near-term priorities. A special task force comprised of funders, advisers and other stakeholders is being formed to closely monitor progress and submit quarterly updates to leadership over the course of PSE’s three-year growth horizon.

EXPANDING OUR BUDGET

Armed with a bold vision and only a shoestring budget, PSE in 2011 began to address the policies and practices that systematically prevent vulnerable communities from reaching their full potential.

As the call for equitable social change grows louder, and the demand for our programs and services intensifies, PSE is ramping up its efforts and will expand its total annual budget to $3.3 million by 2020.

PSE is profoundly grateful for the generous support over the years from donors who share our conviction that equity is the superior growth model for communities and regional economies. Their investments have provided enormous benefits to PSE’s stakeholders and we have been responsible stewards of the funding entrusted to us.

With a reserve balance in place and PSE’s budget on positive growth trajectory, we are pursuing an ambitious and pragmatic resource development strategy to bolster our bottom line and, in turn, fund additional programs as we broaden our equity portfolio. These sources are:

- **Philanthropic** – Private donations represent the single largest source of PSE funding, a trend that is projected to continue. To expand the pool of donors, PSE is extending its outreach to industries such as banking, real estate, technology and infrastructure. Industry sector “champions” from these specialties will provide PSE with guidance, political capital and support.

- **Fee for Service** – Once minimal, dollars that are earned from consulting activities have increasingly become essential to PSE’s overall funding mix; they accounted for more than $250,000 in income in 2017. PSE will develop a formal business development strategy for our consulting efforts to embed them in the organization and determine appropriate fee schedules.

- **Special Events** – PSE’s calendar is packed with high-impact activities the organization is hosting or participating in, but this supplemental funding category remains largely untapped. In the first phase of PSE’s strategic growth strategy, special events will be utilized to increase brand awareness and to raise funds for operating expenses. A “State of Equity” conference is planned for 2018 and PSE’s overarching goal is to generate 8.5% of the organization’s annual revenue from special events.

With integrity as our watchword, PSE will continue to uphold the highest standards of transparency and accountability. Every year since 2013, for example, PSE has received an “unqualified” judgment from an independent auditor verifying that our financial records and statements are fairly and appropriately presented in accordance with Generally Accepted Accounting Principles (GAAP).

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“Today, we’re seeing policies that are becoming less inclusive and more restrictive and they’re excluding certain demographic groups. We must make sure we have truly equitable solutions and PSE is highlighting this issue in a way that resonates with people.”

—Helen Butler, Executive Director, Georgia Coalition For The People’s Agenda

“PSE’s work is very relevant across the region, but especially in Atlanta, as it not only sets the tone for racial and socioeconomic equality but also for the community to come together and, in a positive way, lift everyone up for balanced opportunity.”

—Andrea Pinabell, President, Southface
PSE Mission Statement: “Partnership for Southern Equity (PSE) advances policies and institutional actions that promote racial equity and shared prosperity for all in the growth of metropolitan Atlanta and the American South.”

PSE would like to thank all of our funders and partners who have supported us in our efforts to realize equity in the American South.

**PSE Board Members**

Chris Burke, *Georgia Institute of Technology*

Hattie B. Dorsey, *H. B. Dorsey and Associates*

Jami Buck-Vance, *Cox Communications*

K. C. George, *National Development Council*

Ryan Gravel, *Sixpitch*

Heather Alhadeff, *Center Forward, Inc.*

Brian Gist, *Southern Environmental Law Center*

Cynthia Jones Parks, *Jones Worley*