



**GREATER NASHVILLE  
REGIONAL COUNCIL**

# **Comprehensive Economic Development Strategy FYs 2018-2022**

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**Second Annual Update  
September 2019**

**Greater Nashville Regional Council**

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**[GNRC.org](http://GNRC.org)**

## Acknowledgments

Funding for this document was provided by the U.S. Department of Commerce Economic Development Administration, the Tennessee Department of Economic and Community Development, and local government members of the Greater Nashville Regional Council.



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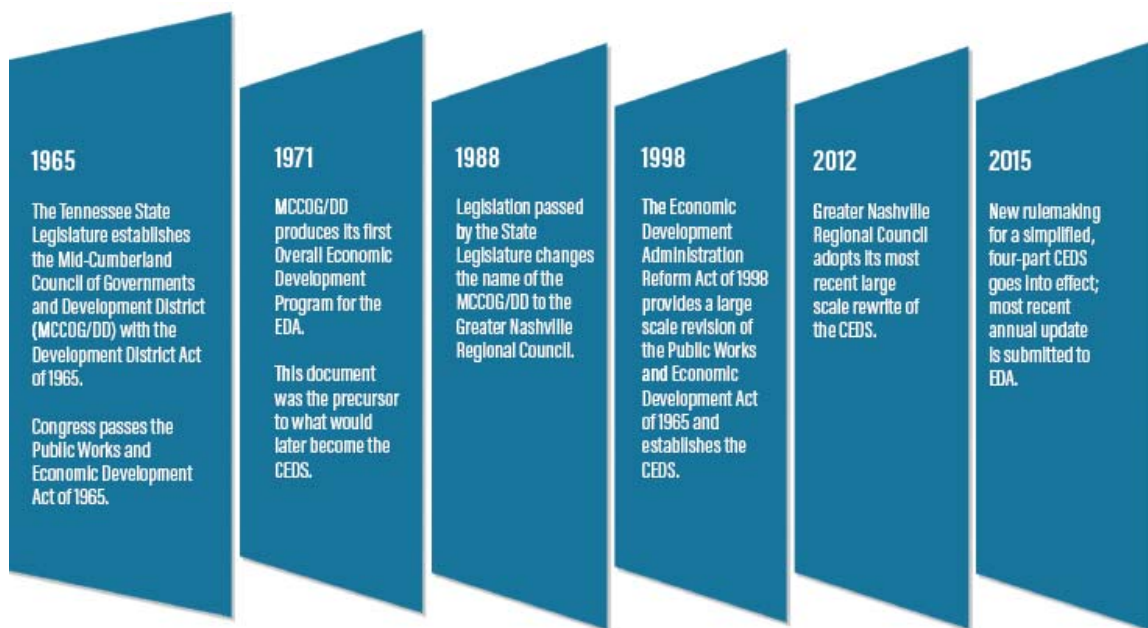
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# 1.0 Introduction

## 1.1 About the CEDS

The Comprehensive Economic Development Strategy (CEDS) is a federally-required document that serves as a regional blueprint for creating a stronger, more diverse economy. It is a strategy-driven plan for regional economic development and is the result of a regionally owned planning process designed to build capacity and guide the economic prosperity and resiliency of the greater Nashville area. The CEDS provides information to serve decision-makers as they determine the region's economic development goals and appropriate plans for action. It allows business and government leaders throughout the region to set priorities for investments in both physical and human capital to solidify how the area as a whole will adapt to a constantly changing global economy.

The development of the CEDS is facilitated by the Greater Nashville Regional Council (GNRC) which is designated by the U.S. Economic Development Administration (EDA) of the U.S. Department of Commerce as the Economic Development District for northern Middle Tennessee. GNRC works on behalf of 13 counties and 52 municipalities across a diverse region which includes metropolitan, urban, suburban and rural areas connected by a single regional economy. The CEDS is funded, in part, by planning grant funds made available through the U.S. EDA to federally-designated Economic Development Districts. Local matching funds are provided by GNRC member cities and counties.



### Why Develop a Strategy?

Everybody within the greater Nashville area benefits when government and business leaders in the region come together to build relationships and share information. This dialog and the discussion of projects or funding priorities can guide decision-makers as they lead the region into the future. In addition, any local governments or organizations seeking to qualify for EDA funding must point to the goals and plans defined in the CEDS to justify their application. **Since 2011, GNRC has helped local organizations and communities secure over \$10 million in EDA grant funds.** Without an EDA approved CEDS, the region would have missed out on these grant opportunities.

## 1.2 Federal Requirements

The Public Works and Economic Development Act of 1965 mandates any community or organization applying for funding under the Economic Development Administration's (EDA) Public Works or Economic Adjustment Assistance Programs have an approved CEDS for their region. Therefore, the EDA designates an Economic Development District (EDD) as the lead organization to head the planning efforts. The Greater Nashville Regional Council is the EDA's appointed organization. This EDD must then create a CEDS Strategy Committee to drive the planning process. The current requirements for the CEDS are outlined in 13 CFR Part 303 as revised and made effective January 20, 2015. It states a CEDS must be the result of a continuing planning process with broad-based public and private sector participation unique to the region that promotes resiliency and includes:

- A summary of the economic development conditions in the region;
- An in-depth analysis of economic strengths, weaknesses, opportunities, and threats
- A strategy and implementation plan that addresses the region's weaknesses and threats while improving its strengths and opportunities; and
- Data-driven performance measures to evaluate the CEDS' implementation.

A new or revised CEDS must be submitted to the EDA at least every five years following a public notice and comment period of no fewer than 30 days. This document is made available on GNRC's website at <http://www.GNRC.org/>.

## 1.3 About the Greater Nashville Regional Council

The Greater Nashville Regional Council (GNRC or the Council), is a public body corporate and politic initially created by the Tennessee Development District Act of 1965 and further empowered by Title 64, Chapter 7, Part 1, Tennessee Code Annotated (TCA), as amended (the Act). GNRC is owned by and operated on behalf of its local government membership comprised of county governments in the counties of Cheatham, Davidson, Dickson, Houston, Humphreys, Montgomery, Robertson, Rutherford, Stewart, Sumner, Trousdale, Williamson, and Wilson, Tennessee, and all incorporated municipalities and metropolitan governments located within these counties.

GNRC's mission is to assist local communities and state agencies in the development of plans and programs that guide growth and development in the most desirable, efficient, and cost-effective manner, while ensuring the continued long-term livability of the region. GNRC is governed by a regional council comprised of city mayors, county mayors/ executives, state legislators, appointments representing business/industry, and appointments representing minority populations and employs approximately 80 full-time staff.

## 1.4 CEDS Advisory Board

Development of the regional CEDS is guided by an advisory board. Representatives on this committee are invited to participate through recommendations by local elected officials and partner organizations throughout the region. They represent the main economic interests of the area and include business owners, economic development professionals, educators, workforce development boards, minority representatives, and elected officials. The advisory board frames the discussion, develops goals and priorities, and suggests data-driven measures prior to the document's adoption by the GNRC. A list of advisory board members who contributed to this document is available in Appendix B.

# 2.0 Annual Update

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## 2.1 Required Update

The CEDS Advisory Board meets at least annually to discuss the strategy document and provide new insights or issues that might influence the economic landscape in the area. This yearly update is required by the U.S. EDA. The first annual update to this document will be made available for public review in September 2018. The second annual update will be presented to the governing body of the GNRC on September 25, 2019 and represents coordination between GNRC and its CEDS Advisory Board on the following the following activities:

- Review and discuss any potential changes in the regional analysis of Strengths, Weaknesses, Opportunities, and Threats (SWOT) documented in the adopted FYs 2018-2022 CEDS;
- Review and discuss the continued relevance of the CEDS Goals, Objectives, and Proposed Actions;
- Publish annual performance measures to track the region’s progress towards addressing its goals;
- Update the regional economic indicators data which describe the health and vitality of the regional economy.

## 2.2 Review of SWOT Analysis

During the development of this 2018-2022 strategy document, regional partners from the CEDS Advisory Board met to discuss the region’s economic strengths, weaknesses, opportunities, and threats. The SWOT analysis conducted among that group was useful in establishing the goals, objectives, and performance measures presented in subsequent chapters. The following presents a summary of the comments received for each of the SWOT categories:

- **Strengths** are a region’s competitive advantages: these are assets—what the region does well.
- **Weaknesses** reveal the region’s competitive disadvantages and internal shortcomings.
- **Opportunities** present real possibilities for regional improvement or progress.
- **Threats** are internal or external factors that could undermine the region’s strengths or eventually contribute to regional decline.

### Strengths

- **Character & Location** - The region considers itself as having a very strong brand, diverse with people and natural amenities. It is strategically located along major transportation corridors. With ample rail, road, river, and air connections, the region’s industries enjoy convenient access to the global marketplace.
- **Education** - The region is proud of its accomplishments with its nationally recognized secondary school systems, investments in higher education and post-secondary training programs for a vibrant workforce, and supplemented by a more diverse talent pool.
- **Regional Collaboration** - Leadership demonstrating regional collaboration at all levels of government is a hallmark of the area. Strong relationships among ECD players and experienced staff coupled with partnerships between utility providers like TVA with state and local governments all support efforts to coordinate regional solutions to overcome any challenge facing the region.
- **Competitive Economy** - The region holds a competitive edge over others in healthcare, automotive clusters and a very wide range of economic opportunities. Job growth opportunity continues to significantly increase with business locations which help attract a talented workforce.
- **Cost of Living** - Low rates on utilities, tax structure, and cost of living per capita make the region very attractive for business location and the workforce. This contributes to the draw for the region.

## Weaknesses

- **Infrastructure** - While major transportation corridors are conveniently located, there are many needs ranging from aging infrastructure to congestion to a lack of significant mass transit. With air transportation, there is a desire for increased international flights to Europe and Asia.
- **Housing** - Workforce housing and affordable housing needs for the diverse population is lacking. As demand increases, the rising costs can drive the potential homeowner logistically further from their places of work.
- **Workforce Education** - While recognized for educational achievements, there is still more work to be done to continue improving both the secondary and post-secondary systems. While more people are enrolling in colleges and TCATs in recent years, a higher percentage of the workforce needs advanced training. There is a perceived deficit in soft skills training and a lack of middle skilled labor.
- **Population and Health** - While great strides have been made with job availability, education, and healthcare, there is a decline in the health and well-being of the local population.
- **Site Availability** - As the region continues to grow, raw land availability decreases while the cost for land increases. This is coupled with a difficulty to meet the continuous need to expand and upgrade the existing infrastructure.

## Opportunities

- **Infrastructure Innovations** - Maintaining existing infrastructure and providing new to keep pace in a competitive economy is crucial to sustaining a thriving region for its citizens. Infill development, airport expansion, and the IMPROVE ACT can all help to maintain a fully-functional infrastructure. However, it will take strong leadership to continue seeking innovative and new ways of funding.
- **Leadership and transition** - When seeking new opportunities and innovations, the periodic transition of leadership can open up opportunities to achieve local and regional goals. Leadership changes can bring in fresh, innovative ideas that can lead to increased buy-in of regional goals and value of growth. This can create a stronger awareness to regional priorities as they change.
- **Funding** - When opportunities for different ways to fund programs arrive like the dedicated transit option, public and private sector leaders throughout the region will need to take advantage. Other budgetary opportunities involve removing funding barriers and forward-thinking about funding prioritization.
- **Placemaking** - With having a strong brand, the region has to maintain it as the population grows and diversifies. This can lead to the potential for refocusing priorities as the population evolves. Attention generated by nationally televised events and sports also can make the region more attractive.
- **Regional Collaboration Improvements** - Maintaining an effective line of communication and coordination between all levels of government is crucial to continuing strong relationships.

## Threats

- **Growing Pains in a Changing World** - The region faces problems with increased delays in goods and service delivery, significant transportation demands, and cost of living increases. The nation is dealing with energy needs, concerns about the climate, and growing foreign economic competition. All of these issues can negatively impact overall standard of living.
- **The Urban-Rural Divide** - While the urban versus rural mentality is still prevalent, the boundary between the two is slowly vanishing. The threats to lifestyle and the economy exist in both urban and rural areas while their respective residents and elected officials disagree on solutions to these common problems.

Efforts to provide for affordable workforce housing, continuing trade-skill education, infrastructure, and others must continue in order to overcome obstacles to growth and prosperity.

- **Politics and Leadership** - Uncertainty with federal-level leadership and funding priorities coupled with state involvement in local issues are presenting concerns in the business community. Locally, an informed and willing leadership to guide funding and implementation of needs is paramount to maintaining steady growth and prosperity while balancing the accepted regional brand and character.
- **Aging Population and Workforce** - An aging population will contribute to increases in needs to healthcare for a demographic of the population that's expected to increase over time. The workforce will likewise need to be trained and ready when the older workforce transitions into retirement.

## Annual Assessment

The CEDS Advisory Board annually reviews the original strengths, weaknesses, opportunities, and threats they defined in the 2018-2022 strategy. The cost of living in the region, originally identified as a strength, is quickly increasing. While still a selling point that local and state economic development professionals utilize when attracting companies, the region's is now almost exactly even with the national average. Many agree that the state's tax structure and lack of an income tax help offset these costs of living increases which keeps the region competitive and attractive to new economic development opportunities. The Nashville region's economy continues to be very strong, but there is also a greater need to promote more economic inclusion opportunities that help promote equity. Many area residents are not similarly experiencing the benefits of the economic growth, and the inability to promote economic mobility threatens the overall prosperity of the Nashville region. In addition, some point to increased market volatility and trade policy uncertainty as potential triggers for a nationwide recession. Working to promote more healthcare device manufacturing and technology businesses is an opportunity to further diversify the region's economy to help insulate it from the effects of an economic downturn.

The successes of the Nashville region have attracted many new businesses and residents in recent years. People are moving from across the world to fulfill the new jobs created in the area. This contributes to the population's growing diversity, a new strength recognized by the Advisory Board. The significant increases in residents combined with a lack of transit options, however, contributes to growing congestion on major roadways. These weaknesses were originally recognized in the original strategy and are still a concern for the majority of residents. Improvements to the regional transit systems still present a great opportunity for elected officials.

The new businesses locating in the region have been developing many of the available industrial and office sites that were such a strength in the past. However, this has led to more interest in rural communities outside of the city center that still have sites available for new or expanding employers. Increasing employment opportunities in these rural areas provides great economic benefits, reduces the distance many residents need to drive for work, and helps lead to new development. Unfortunately, this sometimes unmanaged growth destroys green space and threatens the region's quality of life strongly anchored in the bucolic settings just outside of the major cities.

Education and workforce development continue to dominate the economic development discussion in the greater Nashville region. State programs like TNAchieves and TNReconnect are still a strong asset for helping to train either new post-secondary students or adult learners. Industry and educators, unfortunately, continue to struggle developing the pipeline of trained workers for the jobs available due to a lack of interest in high demand fields. Educating students, teachers, and parents about these careers present a great opportunity for communities to address this workforce challenge.

## 2.3 Review of Goals, Objectives, and Action Plan

Addressing the region's equity concerns and the factors contributing to the rising costs of housing are a chief concern of many residents. Cities and counties large and small are realizing significant housing affordability



challenges that contribute to changes in the community and often make it very difficult for people to live where they work. Tackling this objective will require state and local policy changes and continued partnerships with non-profits and developers to promote measures diversification in housing stock and other affordability tools.

The Advisory Board still strongly supports the goal to Grow to Prosper. Achieving this growth with the predominant urban-rural divide still in the region is a challenge due to the desire to simultaneously manage sprawl and development in green space. Achieving this work will take a regional approach and rely heavily on local governments to both contribute and implement plans and best practices in this field.

Innovation and promoting the emerging sectors of tomorrow's economy are vital to the Nashville area's contained success. Economic forecasts show technology overtaking local and state government as a key employment sector in the coming years. The region must enhance many of the proposed actions needed to realize its goal to "innovate to lead". Automation will continue to allow the same work to be done by fewer individuals, and leaders must work with industry and educators to be prepared for this impact on strong sectors in the region such as distribution and advanced manufacturing. In addition, communities must continue working with state and federal agencies as well as telecommunications and electric cooperatives to enhance access to broadband. This will help ensure all residents have the ability to take part in the 21<sup>st</sup> century economy.

## 2.4 Annual Performance Measure Tracking

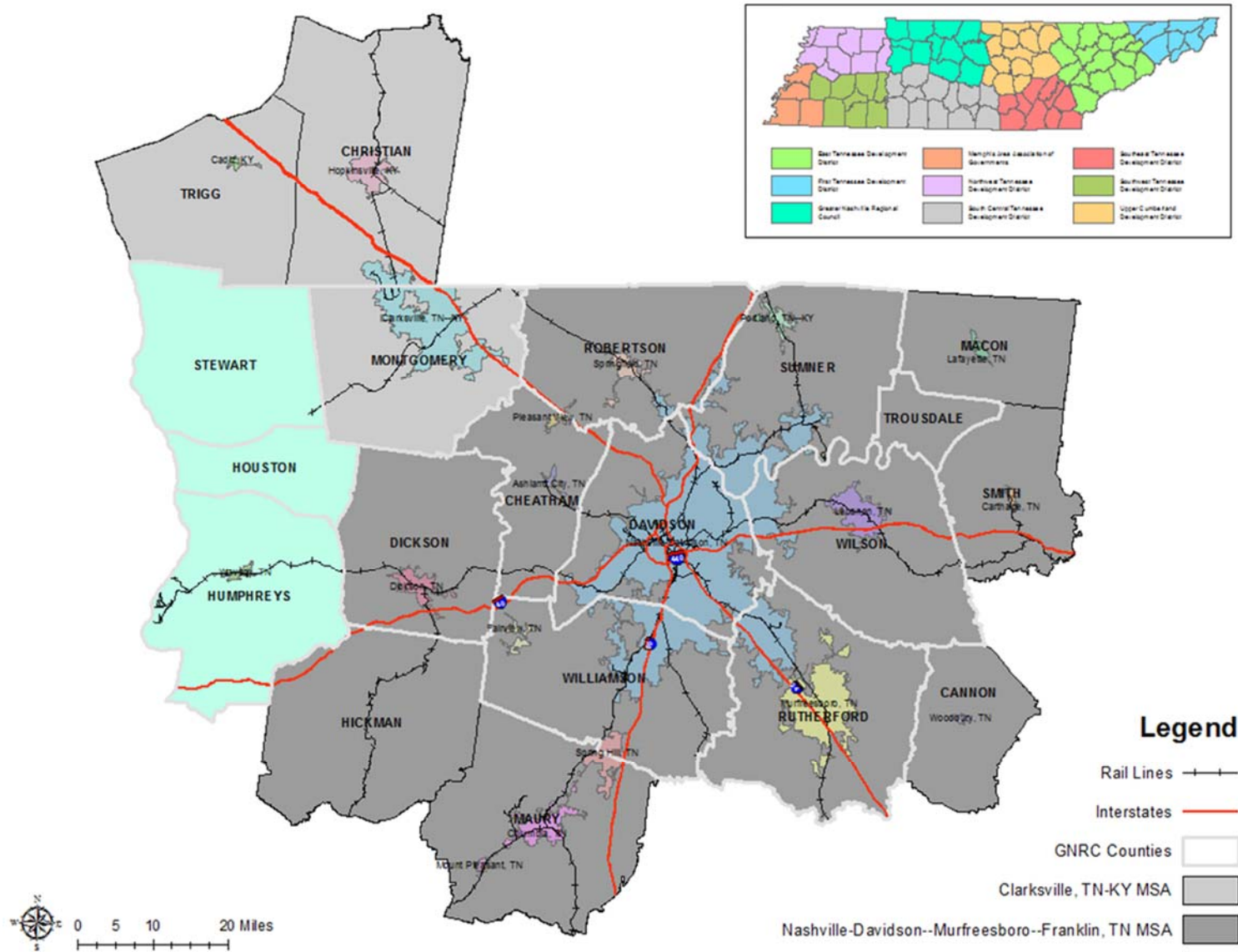
As part of the Action Plan for the 5-year CEDS, GNRC will use the following metrics to measure progress towards implementation and present the latest numbers for each as part of the annual updates published each September. In addition, the economic indicators presented in Appendix C will be updated with the latest information. Values for the metrics with comparisons to the most recent year of data are provided in Appendix C to this annual update.

- Percent of urbanized area households and jobs within ½ mile of regular fixed-route transit service,
- Commuter mode share,
- County Health Rankings,
- Patents filed,
- Direct foreign investment,
- Sales receipts,
- Property value,
- Number of cost-burdened households,
- Percent of households with access to broadband,
- Unemployment rate,
- Wages,
- Number of communities with adopted comprehensive growth plans,
- Dollars per capita spent on infrastructure.

## 2.5 Update to the Regional Economic Indicators

The demographic data and economic measures included within these indicators are used throughout the country by most state and regional organizations to display important information and trends regarding the strength of the economy. Historical data help define trends in important areas such as population, jobs, and the poverty rate. Future estimates in these same fields as well as employment sectors allow regional leaders to plan for the impact these new residents and workers will have on their communities.

# Appendix A. Map of Planning Area



# Appendix B. Annual Stakeholder Review

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## CEDS Advisory Board

- Emel Alexander, Metro Development and Housing Agency
- Nicholas Lindeman, Metro Planning Department
- Lyndi Berrones, TN Dept. of Economic and Community Development
- Edward Burch, TN Dept. of Economic and Community Development
- Philip Mattingly, Mattingly & Company, LLC
- James Fenton, Gallatin Economic Development Agency
- Ginger Hausser, Nashville State Community College
- Margot Fosnes, Robertson County Economic Development Board
- Vonda Gates, Clarksville-Montgomery County Industrial Development Board
- Jerome Terrell, Cheatham County
- Stan Williams, Clarksville Metro Planning Organization
- Mae Wright, Director, Tennessee College of Applied Technology-Hartsville
- Lethia Mann, First Tennessee Bank
- Dan Tidcomb, Project Manager, Tennessee Central Economic Alliance
- Matt Wiltshire, Metro Development and Housing Agency
- Rupa DeLoach, Nashville Area Chamber of Commerce
- Katie Sharp, Nashville Area Chamber of Commerce
- Nick Cunningham, Nashville Area Chamber of Commerce

## Stakeholder Survey Results

Final results of a survey conducted with the CEDS Advisory Board on August 16 follows.



## Comprehensive Economic Development Strategy (CEDS)

### Annual Update - Survey of Advisory Committee Members

**The Comprehensive Economic Development Strategy (CEDS) is a federally-required document that serves as a regional blueprint for creating a stronger, more diverse economy. It is a strategy-driven plan for regional economic development and is the result of a regionally owned planning process designed to build capacity and guide the economic prosperity and resiliency of the greater Nashville area. The CEDS provides information to serve decision-makers as they determine the region's economic development goals and appropriate plans for action. It allows business and government leaders throughout the region to set priorities for investments in both physical and human capital to solidify how the area as a whole will adapt to a constantly changing global economy.**

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#### **ADOPTION & ANNUAL UPDATES**

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**(VIEW THE FYs 2018-2022 CEDS DOCUMENT)**

## 1. About You

Name

Title

Organization

Email

Phone

## Evaluation of SWOT Analysis

The SWOT Analysis conducted last year with members of the Advisory Committee is provided in Section 3, starting on page 10 of the CEDS document. ([VIEW CEDS DOCUMENT](#))

### 2. Observed **STRENGTHS** (page 10)

	Keep	Remove
Character & Location	<input type="radio"/>	<input type="radio"/>
Education	<input type="radio"/>	<input type="radio"/>
Regional Collaboration	<input type="radio"/>	<input type="radio"/>
Competitive Economy	<input type="radio"/>	<input type="radio"/>
Cost of Living	<input type="radio"/>	<input type="radio"/>

### 3. Are there any additional **STRENGTHS** that should be identified in the CEDS?

### 4. Observed **WEAKNESSES** (page 10)

	Keep	Remove
Infrastructure	<input type="radio"/>	<input type="radio"/>
Housing	<input type="radio"/>	<input type="radio"/>
Workforce Education	<input type="radio"/>	<input type="radio"/>
Population and Health	<input type="radio"/>	<input type="radio"/>
Site Availability	<input type="radio"/>	<input type="radio"/>

5. Are there any additional WEAKNESSES that should be identified in the CEDS?

6. Observed OPPORTUNITIES (page 11)

	Keep	Remove
Infrastructure Innovations	<input type="radio"/>	<input type="radio"/>
Leadership and Transition	<input type="radio"/>	<input type="radio"/>
Funding	<input type="radio"/>	<input type="radio"/>
Placemaking	<input type="radio"/>	<input type="radio"/>
Regional Collaboration Improvements	<input type="radio"/>	<input type="radio"/>

7. Are there any additional OPPORTUNITIES that should be identified in the CEDS?

8. Observed THREATS (page 12)

	Keep	Remove
Growing Pains in a Changing World	<input type="radio"/>	<input type="radio"/>
The Urban-Rural Divide	<input type="radio"/>	<input type="radio"/>
Politics and Leadership	<input type="radio"/>	<input type="radio"/>
Aging Population and Workforce	<input type="radio"/>	<input type="radio"/>

9. Are there any additional THREATS that should be identified in the CEDS?

## Evaluation of GOALS, OBJECTIVES, ACTIONS

This information is provided in Section 4, starting on page 13 of the CEDS document.

[\(VIEW CEDS DOCUMENT\)](#)

10. How well do the Goals, Objectives, and Proposed Actions hold up after the first year of the CEDS?

	Holds True	Needs Updating
Goal 1. Educate to Train (page 13)	<input type="radio"/>	<input type="radio"/>
Goal 2. Innovate to Lead (page 14)	<input type="radio"/>	<input type="radio"/>
Goal 3. Invest to Build (page 14)	<input type="radio"/>	<input type="radio"/>
Goal 4. Grow to Prosper (page 15)	<input type="radio"/>	<input type="radio"/>
Goal 5. Plan to Sustain (page 16)	<input type="radio"/>	<input type="radio"/>

11. Please share any proposed updates or edits to Section 4 of the CEDS document detailing the Goals, Objectives, and Proposed Actions.

Goal 1 Edits

Goal 2 Edits

Goal 3 Edits

Goal 4 Edits

12. Please share any suggestions or proposed actions that will help the region meet the Section 4 goals and objectives.

Goal 1 Proposed Actions

Goal 2 Proposed Actions

Goal 3 Proposed Actions

Goal 4 Proposed Actions

## Q1 About You

Answered: 12 Skipped: 0

ANSWER CHOICES	RESPONSES	
Name	100.00%	12
Title	100.00%	12
Organization	100.00%	12
Email	100.00%	12
Phone	91.67%	11

#	NAME	DATE
1	Lyndi Berrones	8/19/2019 10:07 AM
2	Mae Wright	8/19/2019 9:56 AM
3	Emel Alexander	8/19/2019 9:52 AM
4	James Fenton	8/19/2019 9:49 AM
5	Nicholas J Lindeman	8/19/2019 9:46 AM
6	Katie Sharp	8/19/2019 9:40 AM
7	Philip Mattingly	8/19/2019 9:34 AM
8	Margot Fosnes	8/19/2019 9:26 AM
9	Edward Bunch	8/19/2019 9:21 AM
10	Dan Tidcomb	8/19/2019 9:16 AM
11	Lethia Mann	8/19/2019 9:11 AM
12	Jerome Terrell	8/19/2019 8:15 AM

#	TITLE	DATE
1	Regional Director, Northern Middle	8/19/2019 10:07 AM
2	President	8/19/2019 9:56 AM
3	Director of Community Development	8/19/2019 9:52 AM
4	Executive Director	8/19/2019 9:49 AM
5	Special Projects Planner	8/19/2019 9:46 AM
6	Director, Economic Development	8/19/2019 9:40 AM
7	Principle	8/19/2019 9:34 AM
8	Chief Eco Dev Officer	8/19/2019 9:26 AM
9	Business Development Consultant	8/19/2019 9:21 AM
10	Project Manager	8/19/2019 9:16 AM
11	Community Development Manager	8/19/2019 9:11 AM
12	Director ECD - Cheatham Co.	8/19/2019 8:15 AM

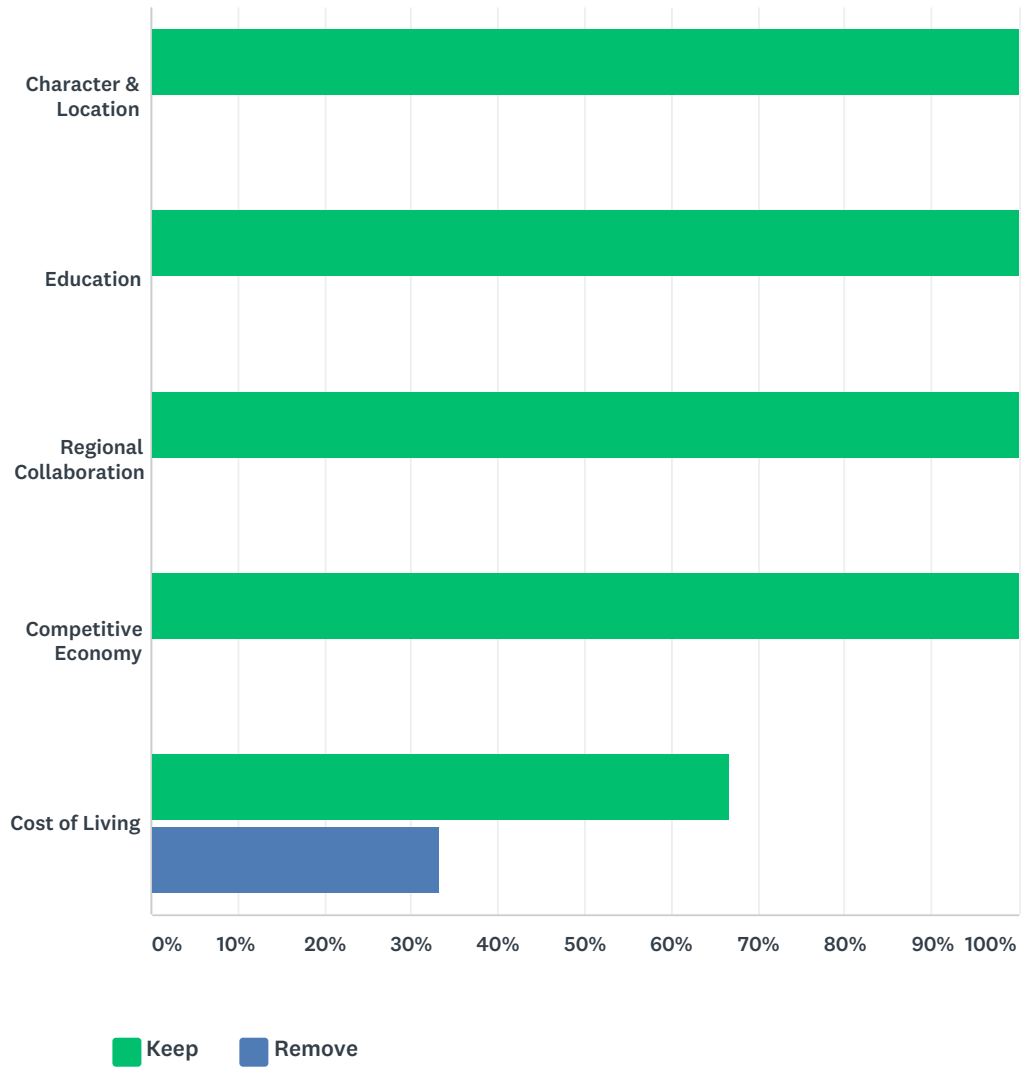
#	ORGANIZATION	DATE
1	TN ECD	8/19/2019 10:07 AM
2	TCAT Hartsville	8/19/2019 9:56 AM





## Q2 Observed STRENGTHS (page 10)

Answered: 12 Skipped: 0



	KEEP	REMOVE	TOTAL
Character & Location	100.00% 11	0.00% 0	11
Education	100.00% 11	0.00% 0	11
Regional Collaboration	100.00% 11	0.00% 0	11
Competitive Economy	100.00% 11	0.00% 0	11
Cost of Living	66.67% 8	33.33% 4	12

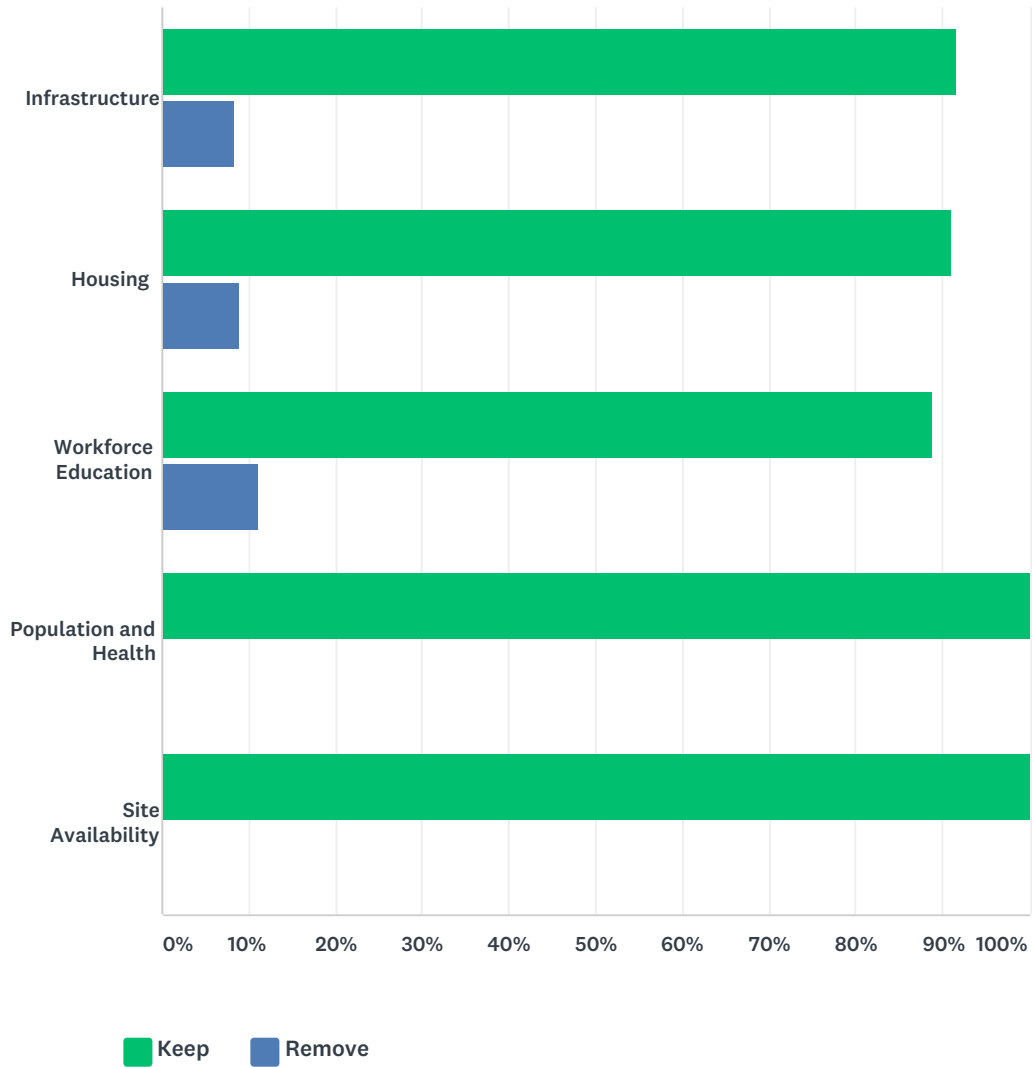
### Q3 Are there any additional STRENGTHS that should be identified in the CEDS?

Answered: 7 Skipped: 5

#	RESPONSES	DATE
1	Relative cost of living still a strength in recruitment but if you have lived in the area for 40 years, Nashville seems super expensive.	8/19/2019 10:07 AM
2	COL now above national average. Increased diversity	8/19/2019 9:46 AM
3	Financial strength, position	8/19/2019 9:40 AM
4	Tax structure- income tax, property tax Quality of life, incentives	8/19/2019 9:21 AM
5	Site availability (in rural areas)	8/19/2019 9:16 AM
6	Workforce education, TN Promise + 55, No income tax	8/19/2019 9:11 AM
7	Tax structure: Income tax, Property tax	8/19/2019 8:15 AM

## Q4 Observed WEAKNESSES (page 10)

Answered: 12 Skipped: 0



	KEEP	REMOVE	TOTAL
Infrastructure	91.67% 11	8.33% 1	12
Housing	90.91% 10	9.09% 1	11
Workforce Education	88.89% 8	11.11% 1	9
Population and Health	100.00% 10	0.00% 0	10
Site Availability	100.00% 10	0.00% 0	10

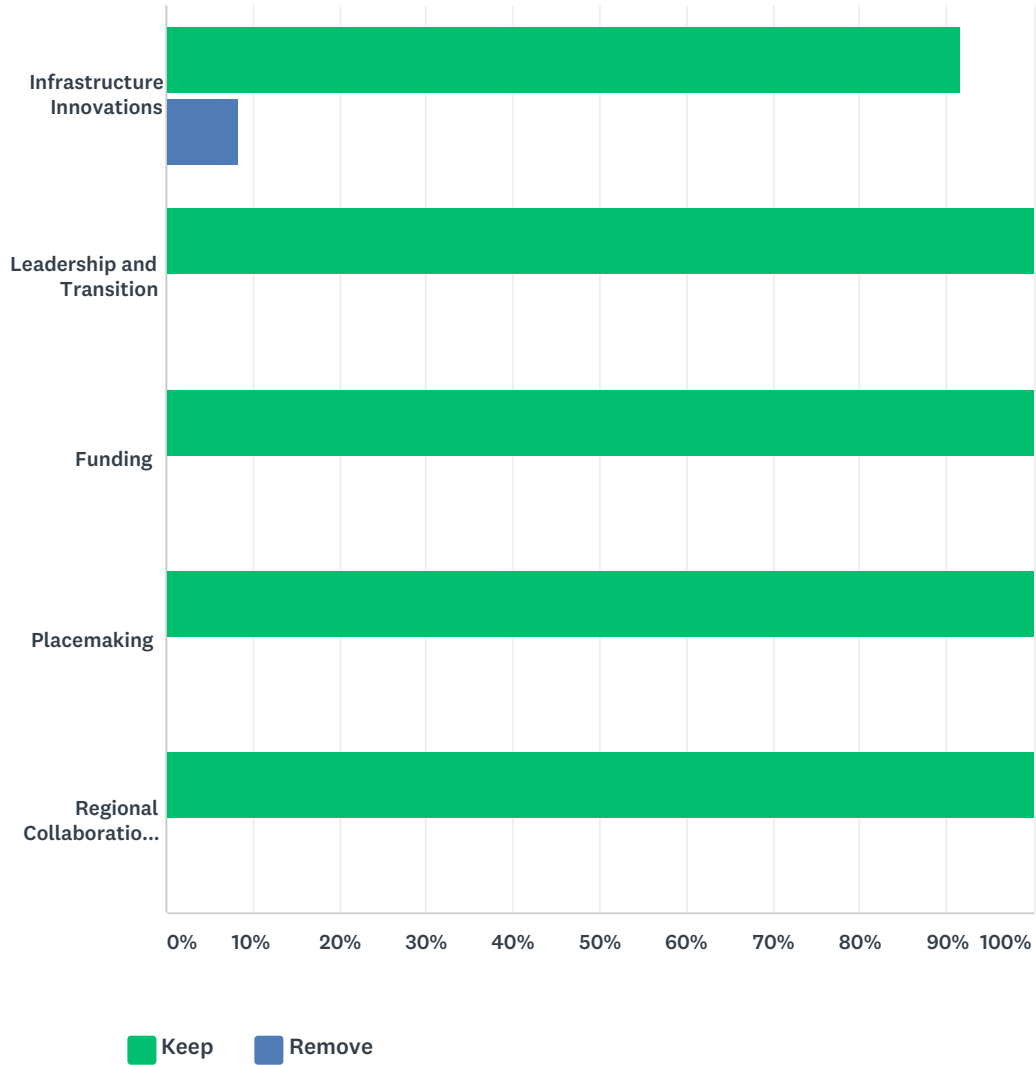
## Q5 Are there any additional WEAKNESSES that should be identified in the CEDS?

Answered: 9 Skipped: 3

#	RESPONSES	DATE
1	Transportation	8/19/2019 9:56 AM
2	Public Transportation	8/19/2019 9:49 AM
3	Lack of transit	8/19/2019 9:46 AM
4	Public transit availability Population/health: drug/ opioid epidemic- strain on labor force participation	8/19/2019 9:40 AM
5	Character changing	8/19/2019 9:34 AM
6	Transportation Workforce pipeline/development	8/19/2019 9:21 AM
7	Mass transit	8/19/2019 9:16 AM
8	Traffic congestion, public education MNPS, lack of public transportation efficiencies	8/19/2019 9:11 AM
9	Public transit	8/19/2019 8:15 AM

## Q6 Observed OPPORTUNITIES (page 11)

Answered: 12 Skipped: 0



	KEEP	REMOVE	TOTAL
Infrastructure Innovations	91.67% 11	8.33% 1	12
Leadership and Transition	100.00% 12	0.00% 0	12
Funding	100.00% 12	0.00% 0	12
Placemaking	100.00% 11	0.00% 0	11
Regional Collaboration Improvements	100.00% 12	0.00% 0	12

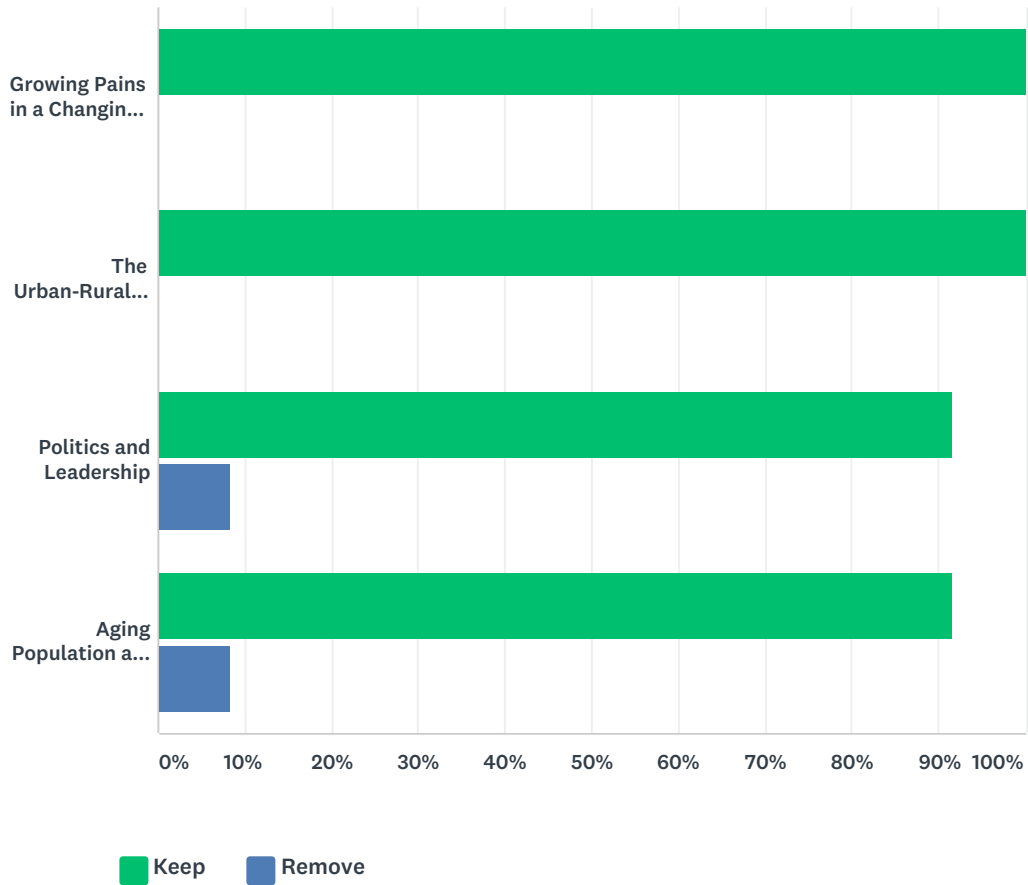
## Q7 Are there any additional OPPORTUNITIES that should be identified in the CEDS?

Answered: 7 Skipped: 5

#	RESPONSES	DATE
1	Public transportation	8/19/2019 10:07 AM
2	Public Transportation	8/19/2019 9:49 AM
3	Metro funding	8/19/2019 9:46 AM
4	Opportunities for economic inclusion leadership	8/19/2019 9:40 AM
5	Diverse industries & Businesses Healthcare & Unemployment Rural/urban divide	8/19/2019 9:21 AM
6	Green emerging industries (renewables) & Broadband economy (remote work in rural areas, entrepreneurship, co-work spaces, etc.)	8/19/2019 9:16 AM
7	Maintaining Green Space with the growth - "Manage Growth"	8/19/2019 8:15 AM

## Q8 Observed THREATS (page 12)

Answered: 12 Skipped: 0



	KEEP	REMOVE	TOTAL
Growing Pains in a Changing World	100.00% 11	0.00% 0	11
The Urban-Rural Divide	100.00% 12	0.00% 0	12
Politics and Leadership	91.67% 11	8.33% 1	12
Aging Population and Workforce	91.67% 11	8.33% 1	12



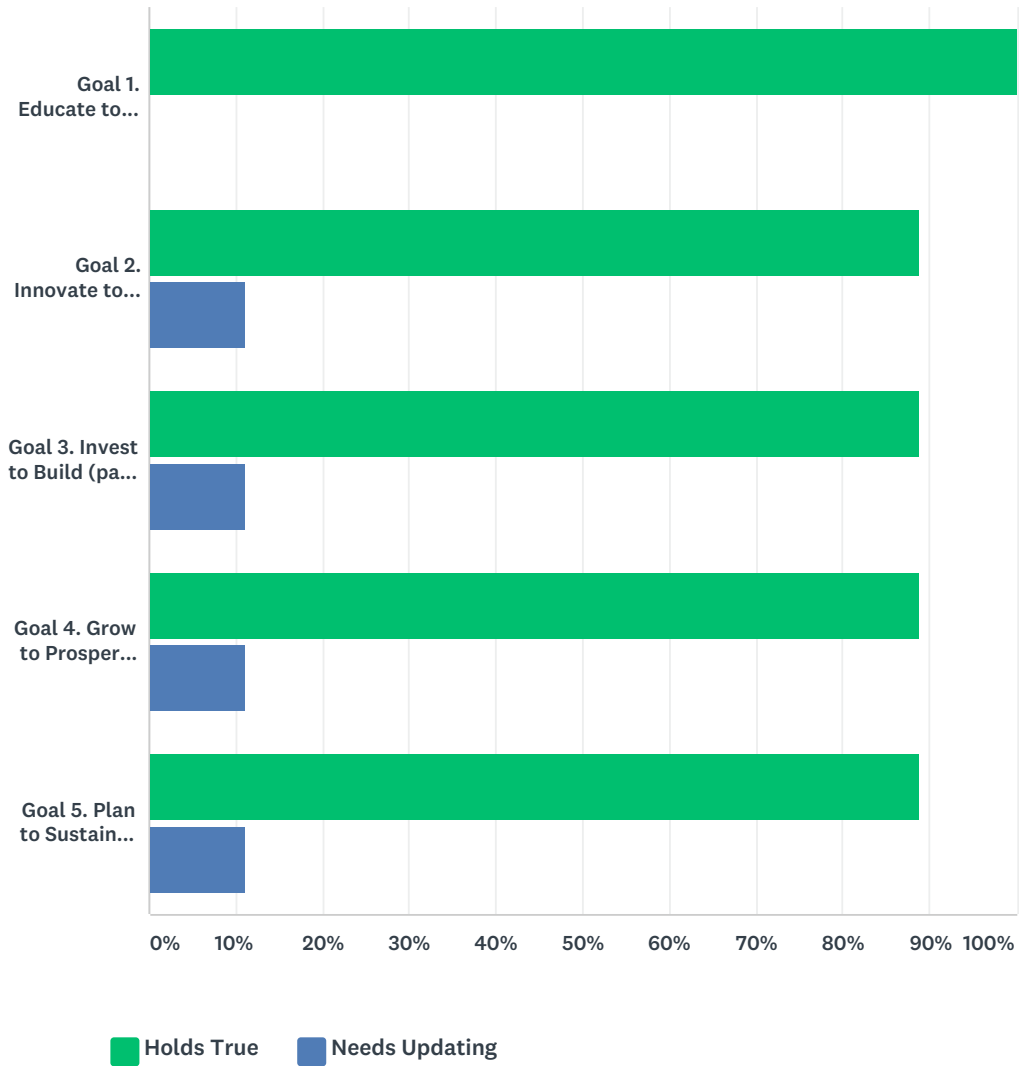
## Q9 Are there any additional THREATS that should be identified in the CEDS?

Answered: 8 Skipped: 4

#	RESPONSES	DATE
1	Managed growth (our success leads to our weakness) Technological advances across all industries and how to keep up and trained in these areas.	8/19/2019 10:07 AM
2	Economic mobility amongst LMI earners and existing residents.	8/19/2019 9:52 AM
3	The nation (as a whole) is overdue for a recession.	8/19/2019 9:46 AM
4	Tariffs and uncertainty of federal policy Automation & technology	8/19/2019 9:40 AM
5	Potential economic downturn at the nation level. Loss of community character and values that made region attractive. Loss of open space/ farm and working lands in the region.	8/19/2019 9:26 AM
6	Market volatility/ population	8/19/2019 9:21 AM
7	Workforce training to keep in line with employment needs.	8/19/2019 9:11 AM
8	Blue collar workforce- Especially with the younger workforce.	8/19/2019 8:15 AM

## Q10 How well do the Goals, Objectives, and Proposed Actions hold up after the first year of the CEDS?

Answered: 9 Skipped: 3



	HOLDS TRUE	NEEDS UPDATING	TOTAL
Goal 1. Educate to Train (page 13)	100.00% 9	0.00% 0	9
Goal 2. Innovate to Lead (page 14)	88.89% 8	11.11% 1	9
Goal 3. Invest to Build (page 14)	88.89% 8	11.11% 1	9
Goal 4. Grow to Prosper (page 15)	88.89% 8	11.11% 1	9
Goal 5. Plan to Sustain (page 16)	88.89% 8	11.11% 1	9

## Q11 Please share any proposed updates or edits to Section 4 of the CEDS document detailing the Goals, Objectives, and Proposed Actions.

Answered: 2 Skipped: 10

ANSWER CHOICES	RESPONSES	
Goal 1 Edits	100.00%	2
Goal 2 Edits	0.00%	0
Goal 3 Edits	0.00%	0
Goal 4 Edits	0.00%	0

#	GOAL 1 EDITS	DATE
1	Increase efforts to expand broadband access.	8/19/2019 9:49 AM
2	Strengthening our workforce pipeline.	8/19/2019 9:21 AM
#	GOAL 2 EDITS	DATE
	There are no responses.	
#	GOAL 3 EDITS	DATE
	There are no responses.	
#	GOAL 4 EDITS	DATE
	There are no responses.	

**Q12 Please share any suggestions or proposed actions that will help the region meet the Section 4 goals and objectives.**

Answered: 3 Skipped: 9

ANSWER CHOICES	RESPONSES	
Goal 1 Proposed Actions	100.00%	3
Goal 2 Proposed Actions	33.33%	1
Goal 3 Proposed Actions	33.33%	1
Goal 4 Proposed Actions	0.00%	0

#	GOAL 1 PROPOSED ACTIONS	DATE
1	Autonomous vehicles impact or trucking + distribution.	8/19/2019 9:46 AM
2	Don't forget rural!	8/19/2019 9:34 AM
3	Add k-8 schools to the collaboration- need to start earlier than HS!	8/19/2019 9:26 AM
#	GOAL 2 PROPOSED ACTIONS	DATE
1	Outreach to parents re: TCAT, cc + certificate programs and opportunities.	8/19/2019 9:26 AM
#	GOAL 3 PROPOSED ACTIONS	DATE
1	Open space preservation plans.	8/19/2019 9:26 AM
#	GOAL 4 PROPOSED ACTIONS	DATE
	There are no responses.	

# Appendix C. Annual Performance Measures

Performance Measure	Base Year	Recent Year	Change
<b>PM #1 - Urbanized Area Transit Access</b>	<b>2010</b>	<b>2017</b>	
Percent of HHs located within UZA with 1/2 mile of regular fixed-route transit service	54%	55%	1%
Percent of HHs located within UZA with 1/2 mile of regular fixed-route transit service		unavailable	
<b>PM #2 - Regional Commuter Mode Share</b>	<b>2016</b>	<b>2017</b>	<b>Change</b>
Drive Alone	82.2%	82.1%	-0.2%
Carpool	9.2%	9.0%	-0.1%
Public Transit	1.2%	1.1%	-0.1%
Walk or Bike	1.6%	0.4%	-1.2%
Other	5.9%	6.3%	0.5%
<b>PM #3 - County Health Rankings - Health Outcom</b>	<b>2018</b>	<b>2019</b>	<b>Change</b>
Cheatham	14	23	-9
Davidson	6	11	-5
Dickson	26	39	-13
Houston	50	63	-13
Humphreys	46	55	-9
Montgomery	9	13	-4
Robertson	11	8	3
Rutherford	3	3	0
Stewart	32	21	11
Sumner	4	5	-1
Trousdale	54	41	13
Williamson	1	1	0
Wilson	2	2	0

Performance Measure	Base Year	Recent Year	Change
<b>PM #4 - Patents Filed</b>	<b>2017</b>	<b>2018</b>	<b>Change</b>
Cheatham	12	5	-58%
Davidson	353	423	20%
Dickson	6	27	350%
Houston	1	1	0%
Humphreys	2	3	50%
Montgomery	17	20	18%
Robertson	20	25	25%
Rutherford	61	87	43%
Stewart	1	0	-100%
Sumner	75	65	-13%
Trousdale	1	0	-100%
Williamson	227	224	-1%
Wilson	15	16	7%
<b>Total GNRC Area</b>	<b>791</b>	<b>896</b>	<b>13%</b>

<b>PM #5 - Foreign Direct Investment - Capital Investment from Foreign-Based Projects</b>			
	2017	2018	Change
Total GNRC Area	\$ 444,007,959.00	\$ 585,130,715.00	32%

<b>PM #6 - Retail Sales</b>	2016	2017	Change
Cheatham	\$ 324,961,584	\$ 342,213,454	5.3%
Davidson	\$ 16,513,347,352	\$ 16,403,529,717	-0.7%
Dickson	\$ 916,728,657	\$ 914,090,683	-0.3%
Houston	\$ 47,169,870	\$ 48,003,410	1.8%
Humphreys	\$ 206,500,158	\$ 227,780,325	10.3%
Montgomery	\$ 2,801,512,851	\$ 2,908,806,448	3.8%
Robertson	\$ 743,689,138	\$ 784,355,523	5.5%
Rutherford	\$ 7,107,191,057	\$ 8,024,940,639	12.9%
Stewart	\$ 68,778,805	\$ 75,821,646	10.2%
Sumner	\$ 2,164,470,552	\$ 2,233,324,406	3.2%
Trousdale	\$ 52,903,720	\$ 55,331,517	4.6%
Williamson	\$ 5,710,593,237	\$ 5,709,031,557	0.0%
Wilson	\$ 2,466,926,295	\$ 2,740,635,003	11.1%
<b>Total GNRC Area</b>	<b>\$ 39,124,773,276</b>	<b>\$ 40,467,864,328</b>	<b>3.4%</b>

Performance Measure	Base Year	Recent Year	Change
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PM #7 - Property Values - Median Value of Owner-Occupied Housing Units	2016	2017	Change
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Cheatham	\$ 163,700.00	\$ 170,500.00	4%
Davidson	\$ 177,700.00	\$ 194,800.00	10%
Dickson	\$ 143,500.00	\$ 146,300.00	2%
Houston	\$ 93,200.00	\$ 94,900.00	2%
Humphreys	\$ 103,900.00	\$ 103,000.00	-1%
Montgomery	\$ 148,600.00	\$ 153,700.00	3%
Robertson	\$ 158,800.00	\$ 163,100.00	3%
Rutherford	\$ 164,800.00	\$ 174,200.00	6%
Stewart	\$ 125,200.00	\$ 130,400.00	4%
Sumner	\$ 184,900.00	\$ 194,900.00	5%
Trousdale	\$ 129,100.00	\$ 128,000.00	-1%
Williamson	\$ 368,100.00	\$ 388,400.00	6%
Wilson	\$ 211,700.00	\$ 227,100.00	7%

PM #8 - Cost Burdened Households	2016	2017	Change
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Cheatham	27.9%	26.9%	-1.0%
Davidson	34.1%	33.3%	-0.8%
Dickson	25.0%	23.9%	-1.1%
Houston	26.0%	23.8%	-2.2%
Humphreys	24.9%	25.3%	0.4%
Montgomery	30.4%	29.5%	-0.9%
Robertson	25.4%	25.6%	0.2%
Rutherford	28.0%	26.2%	-1.8%
Stewart	26.5%	24.5%	-2.0%
Sumner	27.8%	26.6%	-1.2%
Trousdale	30.7%	29.7%	-1.0%
Williamson	22.7%	21.6%	-1.1%
Wilson	26.2%	25.0%	-1.2%
Tennessee	28.7%	27.8%	-0.9%
United States	32.9%	32.0%	-0.9%

<b>Performance Measure</b>	<b>Base Year</b>	<b>Recent Year</b>	<b>Change</b>
<b>PM #9 - Population with Access to Broadband Service</b>			
	<b>2016</b>	<b>2017</b>	<b>Change</b>
Cheatham	94.8%	93.3%	-1.4%
Davidson	97.0%	97.2%	0.2%
Dickson	82.9%	84.9%	2.0%
Houston	46.7%	46.2%	-0.5%
Humphreys	39.0%	38.1%	-0.9%
Montgomery	91.7%	93.0%	1.3%
Robertson	82.4%	83.8%	1.4%
Rutherford	95.7%	96.0%	0.2%
Stewart	61.8%	76.5%	14.6%
Sumner	96.7%	97.8%	1.1%
Trousdale	68.6%	68.8%	0.1%
Williamson	93.2%	92.6%	-0.6%
Wilson	94.8%	95.2%	0.4%
Tennessee	89.6%	90.5%	0.9%
United States	93.4%	94.4%	1.0%

<b>PM #10 - Unemployment Rate</b>	<b>June 2018</b>	<b>June 2019</b>	<b>Change</b>
Cheatham	3.3%	3.3%	0.0%
Davidson	3.1%	3.0%	-0.1%
Dickson	3.5%	3.5%	0.0%
Houston	6.4%	5.5%	-0.9%
Humphreys	5.0%	4.5%	-0.5%
Montgomery	4.6%	4.4%	-0.2%
Robertson	3.6%	3.5%	-0.1%
Rutherford	3.3%	3.2%	-0.1%
Stewart	5.8%	5.3%	-0.5%
Sumner	3.3%	3.2%	-0.1%
Trousdale	4.0%	3.8%	-0.2%
Williamson	3.0%	3.0%	0.0%
Wilson	3.3%	3.3%	0.0%
Total GNRC Area	3.3%	3.3%	0.0%



Performance Measure	Base Year	Recent Year	Change
<b>PM #11 - Median Income (2017 dollars)</b>	<b>2016</b>	<b>2017</b>	<b>Change</b>
Cheatham	\$ 32,052.00	\$ 32,920.00	2.7%
Davidson	\$ 31,272.00	\$ 31,541.00	0.9%
Dickson	\$ 30,713.00	\$ 29,838.00	-2.8%
Houston	\$ 23,844.00	\$ 25,102.00	5.3%
Humphreys	\$ 27,497.00	\$ 26,461.00	-3.8%
Montgomery	\$ 30,681.00	\$ 30,784.00	0.3%
Robertson	\$ 32,152.00	\$ 31,755.00	-1.2%
Rutherford	\$ 32,194.00	\$ 32,486.00	0.9%
Stewart	\$ 26,435.00	\$ 25,833.00	-2.3%
Sumner	\$ 32,671.00	\$ 32,941.00	0.8%
Trousdale	\$ 27,311.00	\$ 27,624.00	1.1%
Williamson	\$ 47,542.00	\$ 47,511.00	-0.1%
Wilson	\$ 36,249.00	\$ 36,813.00	1.6%
Tennessee	\$ 29,069.00	\$ 29,790.00	2.5%

PM #12 - Communities with Adopted Comprehensive Plans	2018	2019	Change
Cheatham	Unavailable	4	N/A
Davidson	Unavailable	3	N/A
Dickson	Unavailable	3	N/A
Houston	Unavailable	0	N/A
Humphreys	Unavailable	1	N/A
Montgomery	Unavailable	1	N/A
Robertson	Unavailable	5	N/A
Rutherford	Unavailable	3	N/A
Stewart	Unavailable	0	N/A
Sumner	Unavailable	6	N/A
Trousdale	Unavailable	0	N/A
Williamson	Unavailable	5	N/A
Wilson	Unavailable	4	N/A
Total GNRC Area	Unavailable	35	N/A

PM #13 - Infrastructure Spending Per Capita (5 Year Rolling Average)	IY 2017	IY 2018	Change
Cheatham	\$ 379	\$ 357	-5.7%
Davidson	\$ 495	\$ 340	-31.4%
Dickson	\$ 117	\$ 163	39.8%
Houston	\$ 545	\$ 601	10.3%
Humphreys	\$ 150	\$ 125	-16.4%
Montgomery	\$ 236	\$ 253	7.4%
Robertson	\$ 199	\$ 201	0.7%
Rutherford	\$ 236	\$ 294	25.0%
Stewart	\$ 495	\$ 195	-60.6%
Sumner	\$ 232	\$ 223	-3.8%
Trousdale	\$ 849	\$ 745	-12.3%
Williamson	\$ 459	\$ 428	-6.8%
Wilson	\$ 542	\$ 484	-10.6%
Total GNRC Area	\$ 377	\$ 324	-14.0%

# Appendix D. Regional Economic Indicators

**Figure 1. Population Trends by County**

	1995	2010	2015	2017	2020	2035	2045
Cheatham	31,526	39,105	39,539	39,713	41,392	49,849	54,774
Davidson	540,338	626,681	663,567	678,322	699,326	798,722	848,072
Dickson	39,109	49,666	50,862	51,341	53,116	61,698	66,221
Houston	7,553	8,426	8,256	8,188	8,440	9,643	10,243
Humphreys	16,862	18,538	18,354	18,281	18,586	19,833	20,150
Montgomery	117,633	172,331	186,466	192,120	206,323	286,262	343,980
Robertson	47,964	66,283	67,920	68,575	72,071	90,357	101,888
Rutherford	150,297	262,604	288,213	298,456	321,842	455,888	555,516
Stewart	10,925	13,324	13,270	13,248	13,606	15,251	15,997
Sumner	116,865	160,645	171,420	175,730	186,143	242,234	279,686
Trousdale	6,590	7,870	8,515	8,773	8,963	9,860	10,267
Williamson	103,830	183,182	203,881	212,161	237,700	402,255	548,266
Wilson	78,242	113,993	124,622	128,874	140,101	206,139	257,285
<b>GNRC Region</b>	<b>1,267,734</b>	<b>1,722,648</b>	<b>1,844,885</b>	<b>1,893,782</b>	<b>2,007,609</b>	<b>2,647,991</b>	<b>3,112,345</b>

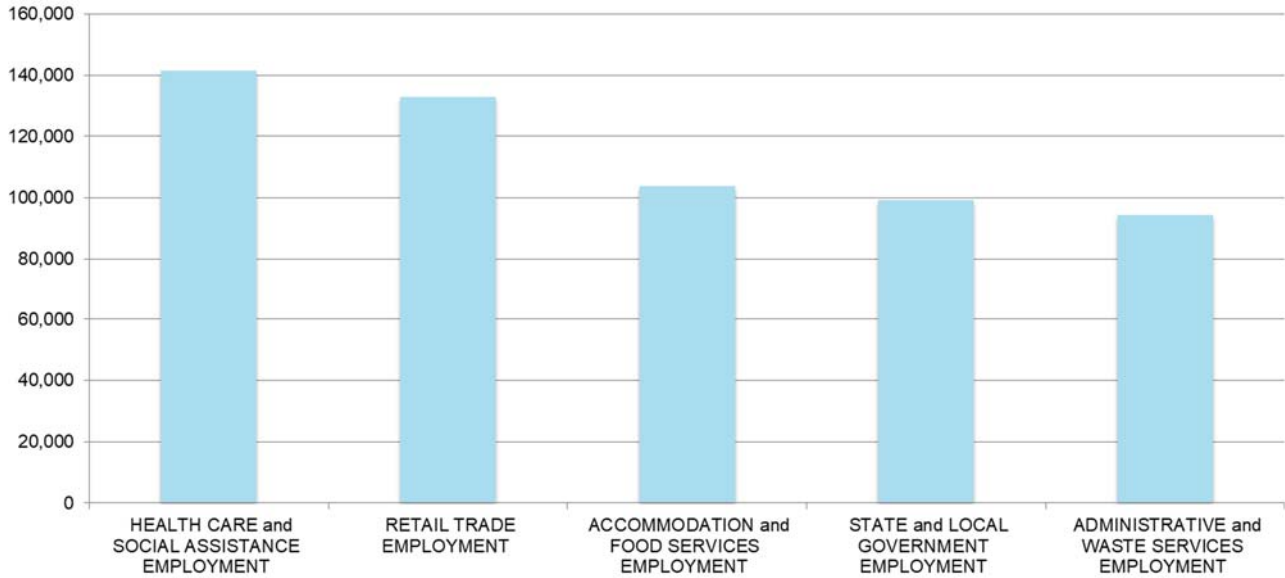
Source: U.S. Census Bureau, Woods and Poole Economics, Inc. (2007 State Profile)

**Figure 2. Employment Trends by County**

	1995	2010	2015	2017	2020	2035	2045
Cheatham	9,727	14,016	14,505	15,000	15,611	18,565	20,304
Davidson	466,335	516,929	601,333	638,807	663,947	794,182	864,682
Dickson	18,260	21,396	24,396	25,579	26,664	31,124	33,019
Houston	2,628	2,900	2,732	2,605	2,740	3,376	3,719
Humphreys	8,225	8,367	8,669	8,813	9,041	10,116	10,678
Montgomery	45,261	63,022	71,001	75,683	80,339	106,251	125,716
Robertson	20,062	27,319	33,401	34,770	36,515	45,567	51,705
Rutherford	85,701	132,239	158,739	171,497	181,083	234,105	272,170
Stewart	4,187	4,735	4,639	4,536	4,716	5,480	5,867
Sumner	56,899	64,958	78,645	85,329	90,000	113,304	128,640
Trousdale	2,203	2,554	2,645	2,862	2,986	3,674	4,177
Williamson	66,282	135,989	173,744	195,115	212,256	319,091	408,236
Wilson	35,211	53,444	60,965	67,948	72,483	99,247	120,231
<b>GNRC Region</b>	<b>820,981</b>	<b>1,047,868</b>	<b>1,235,414</b>	<b>1,328,544</b>	<b>1,398,381</b>	<b>1,784,082</b>	<b>2,049,144</b>

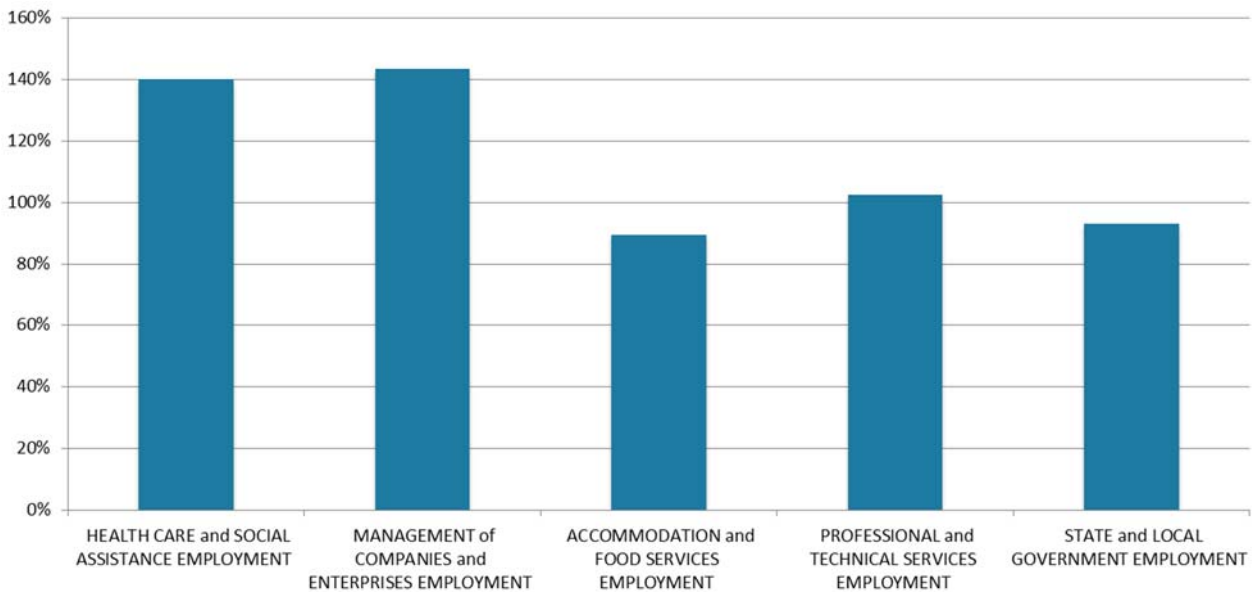
Woods and Poole Economics, Inc. (2017 State Profile)

**Figure 3. Top Sectors for Regional Employment, 2017**



Source: Woods & Poole 2017 Tennessee State Profile

**Figure 4. Top Sectors for Regional Employment Anticipated Growth, 2017 to 2050**



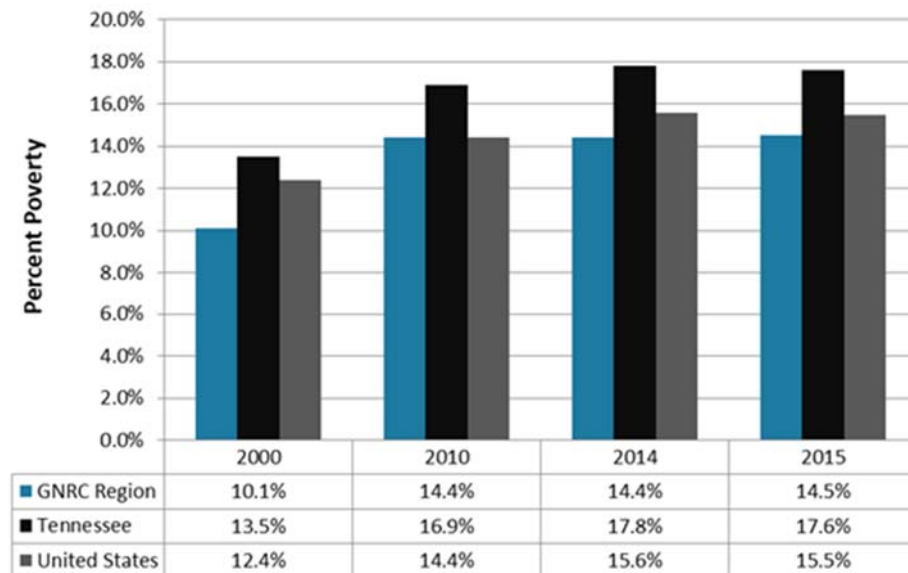
Source: Woods & Poole 2017 Tennessee State Profile

**Figure 5. Regional Employment/ Unemployment Rate by County, 2019**

	Labor Force	Employed	Unemployed	UE Rate
Cheatham	22,494	21,760	734	3.3%
Davidson	415,808	403,285	12,523	3.0%
Dickson	27,558	26,581	977	3.5%
Houston	3,257	3,079	178	5.5%
Humphreys	8,993	8,588	405	4.5%
Montgomery	88,254	84,385	3,869	4.4%
Robertson	38,682	37,332	1,350	3.5%
Rutherford	185,555	179,619	5,936	3.2%
Stewart	5,298	5,019	279	5.3%
Sumner	103,489	100,174	3,315	3.2%
Trousdale	5,127	4,931	196	3.8%
Williamson	129,247	125,363	3,884	3.0%
Wilson	76,692	74,170	2,522	3.3%
<b>GNRC Region</b>	<b>1,110,454</b>	<b>1,074,286</b>	<b>36,168</b>	<b>3.3%</b>

Source: TN Labor and Workforce Development, June 2019

**Figure 6. Regional vs. State and National Poverty Rate Trends, 2000-2015**



Source: U.S. Census Bureau, 2015 American Community Survey 5-Year Estimates

**Figure 7. Educational Attainment by County, 2017**

	<b>HS Diploma or better</b>	<b>Bachelor's Degree or better</b>
Cheatham	86.8%	17.9%
Davidson	88.2%	36.4%
Dickson	82.9%	13.3%
Houston	78.4%	10.0%
Humphreys	83.4%	11.4%
Montgomery	92.0%	23.5%
Robertson	86.9%	17.1%
Rutherford	91.0%	28.3%
Stewart	87.6%	14.0%
Sumner	89.1%	24.8%
Trousdale	81.0%	14.3%
Williamson	94.3%	54.0%
Wilson	90.3%	27.8%
<b>GNRC Region</b>	<b>89.5%</b>	<b>31.7%</b>
<b>Tennessee</b>	<b>86.7%</b>	<b>24.0%</b>
<b>United States</b>	<b>87.2%</b>	<b>28.4%</b>

Source: 2017 American Community Survey 5-Year Estimates

**Figure 8. Export Sectors for Nashville-Davidson-Franklin-Murfreesboro MSA, 2017**

<b>Export Sector</b>	<b>Export Value (\$Millions)</b>
Transportation Equipment	\$4,088
Computer and Electronic Products	\$2,504
Electrical Equipment, Appliances and Components	\$563
Chemicals	\$521
Machinery, except electrical	\$482

Source: U.S Department of Commerce - International Trade Administration

**Figure 9. Export Markets for Nashville-Davidson-Franklin-Murfreesboro MSA, 2017**

<b>Export Market</b>	<b>Export Value (\$Millions)</b>
Canada	\$4,252
Mexico	\$1,487
Japan	\$591
China	\$539
Hong Kong	\$337

Source: 2017 U.S Department of Commerce - International Trade Administration

