Comprehensive Economic Development Strategy for the Greater Nashville Region

2018-2022
GNRC RESOLUTION 2018-02

A RESOLUTION ADOPTING THE FIVE YEAR COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY FOR NORTHERN MIDDLE TENNESSEE

WHEREAS, the Greater Nashville Regional Council (GNRC) was established in 1965 by the Tennessee General Assembly as public body politic to serve as the development district for northern Middle Tennessee, and has since been designated by the U.S. Department of Commerce Economic Development Administration (EDA) as the Economic Development District for the same area; and

WHEREAS, GNRC, serving in its role as the federally-designated Economic Development District for the region, is required to develop a five year Comprehensive Economic Development Strategy (CEDS) in accordance with 13 CFR 303.7, the EDA Reform act of 1998, and the Public Works and Economic Development Act of 1965, as amended; and

WHEREAS, the CEDS must be developed through a collaborative planning process among public and private-sector stakeholders with the intent to guide the economic prosperity and resiliency of the region; and

WHEREAS, the CEDS was first prepared and adopted by the GNRC in 1971 and has since been periodically revised and updated to reflect changing regional growth trends, conditions, and needs; and

WHEREAS, the GNRC planning area has grown by more than 90 people per day since 2010 and is expected to add another 1.4 million people between 2017 and 2050 to exceed a total population of 3.34 million; and

WHEREAS, it is necessary for local governments across Middle Tennessee to work together and with state and federal partners and the private sector to prepare for that growth by investing in infrastructure improvements and workforce development strategies to ensure the economy stays healthy over the same period of time; and

WHEREAS, the GNRC has collaborated with an Advisory Board comprised of mayors and county executives, other local officials, local planners, and representatives from area chambers of commerce, workforce development boards, industrial development boards, joint economic and community development boards, among other business and industry groups, to develop the CEDS for FY 2018 through FY 2022 to ensure that communities remain eligible for grants through the U.S. EDA aimed at strengthening the national economy.

NOW, THEREFORE, BE IT RESOLVED, by the Greater Nashville Regional Council that the FYs 2018-2022 CEDS is hereby adopted.

RESOLVED, this 27th day of September, 2017, the public health, safety, order, prosperity and general welfare of the citizens of this Region requiring it.
APPROVED AS TO FORM AND LEGALITY:

Hope Jackson
Chief Legal Counsel

ATTEST:

Michael Skipper
Executive Director and Secretary

APPROVED:

The Honorable Ken Moore
President
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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1. Introduction

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.

History of the CEDS

1965
The Tennessee State Legislature establishes the Mid-Cumberland Council of Governments and Development District (MCCE/D) with the Development District Act of 1965.
Congress passes the Public Works and Economic Development Act of 1965.

1971
MCCE/D produces its first Overall Economic Development Program for the EDA.
This document was the precursor to what would later become the CEDS.

1988
Legislation passed by the State Legislature changes the name of the MCCE/D to the Greater Nashville Regional Council.

1998
The Economic Development Administration (EDA) of 1998 provides a large scale revision of the Public Works and Economic Development Act of 1965 and establishes the CEDS.

2012
Greater Nashville Regional Council adopts its most recent large scale revision of the CEDS.

2015
New rulemaking for simplified, four-part CEDS goes into effect; most recent annual update is submitted to EDA.

2016
Annual update due to EDA.

2017
Regional collaboration among communities and economic development experts to draft a major revision to the CEDS.

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.
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, along with a copy of the prior CEDS, is made available on GNRC’s website at http://www.GNRC.org/.

About the GNRC

GNRC is one of nine regional development districts established by the Tennessee General Assembly under the Tennessee Development District Act of 1965. GNRC is a public body corporate and politic and operates as a council of governments (COG). It is owned and operated by its municipal and county government members in order to deliver regional programs and services that are funded, in part, by state and federal grant programs.

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 nearly 80 full-time staff.

CEDS Advisory Board

Development of the region’s 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.

Annual Updates

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.
2. Regional Profile

Growth Trends and Pressures

Over the last two decades, Middle Tennessee has emerged as the state’s foremost economic engine, with Nashville recently surpassing Memphis as Tennessee’s largest city. The region is on pace to grow from 1.9 million people today to approximately 3 million by 2040. Where those people live, work, and play, along with their socio-economic characteristics, will significantly influence the need for investments into our region’s infrastructure. As we think about those investments, it is important to realize that by the 2040, the region will be larger than the present-day Denver region and approaching the size of the Seattle-Puget Sound metropolitan area.

The significance of Middle Tennessee’s growth is further reinforced when one considers that more than half (52 percent) of the state’s projected 2.5 million population increase between 2010 and 2040 is expected to occur within Davidson and surrounding counties. A closer look at those forecasts reveal that by the year 2040 three area counties will be ranked in the top 5 most populous across the state including Davidson (#2 with 832,000 people), Rutherford (#4, 517,000), and Williamson (#5, 488,000). Williamson and Rutherford counties are expected to add the most people during that time, leapfrogging Chattanooga-Hamilton County in the rankings.

Net Population Change by County, 2010 to 2040

Within the region, Davidson County is expected to remain the most populous county of the region and the center of the region’s job market. Williamson County is expected to see the largest rate of growth, as well as the largest net increase in population, more than doubling its population from 2010 through 2040, from 184,035 people to more than 488,000 – a 165 percent increase.

Not only is population increasing at a rapid rate, so too is the demographic diversity of the region, particularly with respect to race, ethnicity, and age. By the year 2040, 15 percent of residents in the area will be 65 years or older, compared with about 11 percent today. Nationally, by the year 2030, experts expect just over one-quarter of all households will have children living at home – compared with about half of households back in the 1950s. The region’s population also will be more racially and ethnically diverse. The percentage of population made up of Hispanic ethnicity will grow to 20 percent by 2040, from about 9 percent in 2015.

Since the 1980s, the Nashville area has evolved into a truly metropolitan economy. Over the last two decades, rapid job growth across a variety of sectors has led to a strong and diversified economic base that excels in the healthcare management, automotive, and publishing industries. Still, the region continues to face challenges with manufacturing employment, mirroring trends at the national level as those jobs are automated or sent
overseas. The Finance, Insurance, and Real Estate and Service sectors are expected to see significant gains in the coming years.

Unfortunately, rising household costs and the lack of sufficient infrastructure place continued prosperity at risk. The area ranks poorly or near the bottom nationally for personal health, transportation options, social disparity, and multiple environmental quality indicators, and must find a way to turn the corner in order to adequately support its current population, not to mention future generations. The following are among the most important concerns for regional leaders:

- **Growing Traffic Congestion** – Despite have more lane miles per capita than most of its peers, the Nashville commute ranks 7th worst in the nation as measured by per capita cost\(^1\), and traffic congestion is on the rise. Additionally, freight traffic is expected to compound the problem as the tonnage of freight on area roadways is expected to grow by 96 percent by 2040. Without improvement to the operational performance of area roadways and coordinated efforts to improve access to rail and other modal options, the amount of time Middle Tennesseans spend in traffic will more than double by 2040\(^2\).

- **Lack of Transit Options** – Nashville invests significantly less, $87.58 per capita, when compared with its peer regions of Atlanta, Austin, Charlotte, Denver, Indianapolis, Louisville, Raleigh, Memphis, and Tampa (average of $136.23 per capita)\(^3\), and as a result provides significantly less service to connect residents to jobs and other destination in the community. Moreover, Nashville currently lacks any local dedicated revenue to fund a capital construction program to build dedicated-lane or fixed-guideway transit options that will enable residents to avoid traffic congestion.

- **Declining Housing Affordability and Access to Jobs** - The cost of housing in Nashville has risen significantly in recent years, pushing many lower income families to seek housing farther from places of employment. As a whole, this segment of the population is often transit dependent and is disproportionately affected by this trend. For Middle Tennesseans struggling with poor transportation access, decreasing the proximity to their source of income can limit the ability to keep a job. This affects both those attempting to climb out of poverty and businesses needing access to workforce.

- **Physical Inactivity and Deteriorating Public Health** - In 2012, the Centers for Disease Control and Prevention ranked Tennessee as the most physically inactive in the nation, and locally, 29 percent of the residents in the Nashville-Davidson- Murfreesboro-Franklin MSA are considered obese. Conditions such as obesity, which is directly related to physical inactivity, combined with injuries from vehicular crashes and diseases related to air pollution, cost the United States hundreds of billions each year in health care costs. Declining public health is due in part to the built environment of cities and neighborhoods; and has led planners and community leaders to reevaluate investments in transportation infrastructure to address public health issues.

- **Workforce Deficits** - With more than 150,000 net new jobs expected in the area over the next ten years, the Nashville Area Chamber of Commerce estimates that there is likely to be a shortage of about 25,000 workers during that timeframe, even with population growth. Workforce development and training has become a central focus of the economic development officials to ensure that the region can continue to provide skilled labor to support growing sectors and emerging industries.

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\(^1\) Texas Transportation Institute Urban Mobility Report  
\(^2\) Nashville Area MPO 2040 Travel Demand Forecast Model  
\(^3\) National Transit Database, 2012
Economic and Market Trends

Established Sectors

Healthcare Management
Throughout the country, healthcare employers are often among the largest in the region because of manpower necessary to provide care in clinics and hospitals. This is no different in the Nashville area with 105,255 people employed in the Healthcare and Medical Devices sector throughout the region. Almost 65% of these employees live in Davidson County with Williamson and Rutherford Counties coming in a distant 2nd and 3rd respectively. Overall, the Healthcare and Social Assistance sector makes up the 11.01% of employment in the region, the highest proportion all other sectors. In addition, this is anticipated to increase almost 4.5% between now and 2050. Vanderbilt University Medical Center holds the top spot as the region’s largest employer with approximately 20,235 employees. Three other healthcare employers are also among the top 10 in the region.

While practitioners and those in support or technical roles make up many of these healthcare jobs, Nashville stands out in comparison to other regions with a very large proportion of people working in the field of healthcare management. Healthcare management or healthcare administration is the field of corporate leadership, management, and operations for public or private health systems and hospital networks. The Nashville area has become the capital of healthcare management with 18 publically traded companies calling the region home including HCA Inc., Brookdale Senior Living, and Community Health Systems. In fact, the Nashville Healthcare Council reports there are almost 400 different healthcare companies in the area generating an overall economic benefit of $38 billion annually and 250,000 total jobs in the region.

The healthcare management sector is anticipated to be the fastest growing industry in the Nashville area. The industry is a targeted sector for advancement by the Nashville Area Chamber of Commerce’s Partnership 2020 as well. Healthcare administration companies are enjoying the benefits of a specialized workforce all located within the Nashville region. In an economy where success breeds success, healthcare companies throughout the country are realizing the sector’s strength in the area and are attracted to growing or relocating. Many of these headquarters are located either near the Nashville downtown core or in Williamson County office complexes. The tremendous lack of available office space in these areas can make expansion or additional locations in the area very difficult for healthcare administration companies. Other concerns for the industry also include external, political impacts related to potential changes in national healthcare policy.

Automotive
Automotive manufacturing companies have been steadily investing in the Interstate-65 corridor from Alabama to Indiana over the last few decades and the Nashville area has enjoyed incredible success being in the geographic center of this region. Automotive manufacturers and related corporate headquarters continue to relocate and expand in the area as both production facilities and their related suppliers look to get within closer proximity to each other for greater manufacturing efficiencies. These include manufacturers of tires, stamped metal, airbags, and many other parts used by the big name car and truck assembly companies. According to the US Census Bureau, there are approximately 240,000 people employed by the automotive industry within the Greater Nashville Region. Over 72% of these employees work within Rutherford County.

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4 Woods & Poole
5 Nashville Health Council
6 Nashville Area Chamber of Commerce
7 Nashville Health Council
Since 1983, Nissan has been producing vehicles in its Smyrna plant just south of Nashville. It is now the region’s third largest employer with approximately 10,100 individuals working in the area. In addition to those working at the plant producing up to 650,000 vehicles a year, Nissan also employs those in management positions at its North American Headquarters in Franklin. The company continues to invest in their plant after a $160 million announcement that will lead to 1,000 new jobs at the Smyrna plant. Following the Japanese automaker’s successful Middle Tennessee location, General Motors opened its Saturn Plant in Spring Hill in 1990 where it currently employs about 3,754 people making it a top 15 employer in the region. Since 2010, the plant has announced over $2.2 billion in investments and has added a third shift to make GMC and Cadillac SUVs. These two assembly plants in the area support hundreds of small and medium sized suppliers throughout Middle Tennessee.

Automotive and Parts Manufacturing is the chef targeted sector for the Nashville Area Chamber of Commerce’s Partnership 2020 within advanced manufacturing and decision makers within the region will continue to work on growing the industry. Recent relocations and expansions at both the manufacturing and corporate headquarters levels are fueling economic growth in the area. The clustering of these businesses is key to their success and is a large reason for the continued advancement of the industry. In addition to the logistical benefits of the region, Tennessee has benefited from its business-friendly climate with minimal organized labor. The automotive sector, like any other, relies on the success of the greater national economy and consumer trends. Political decisions and unionization votes at automakers also have the potential to create changes in the industry at the regional and state level.

Transportation & Logistics

The Greater Nashville Region has long been a hub for shipping and moving freight. Before interstates and even railroads crisscrossed the area, barges and boats used the Cumberland River as a main shipping artery in the Southeastern United States. While barges still push heavy raw materials up and down the river, many companies have realized the potential the area’s railroads and highways have to help get their product to market. The Transportation, Distribution, and Logistics sector now employs approximately 72,800 people throughout the region and the Transportation and Warehousing industry is anticipated to grow by over 45% between 2017 and 2045.

In recent years, logistics companies and large retailers have invested millions in warehousing facilities in order to utilize Nashville’s geographic location to improve their distribution. In the past few years, companies like Under Armour have chosen Wilson County to expand its shipping capabilities while Lowe’s is constructing its first centralized distribution center in Robertson County. Logistics giants such as UPS and Amazon are also among the region’s largest employers ranking 20th and 21st respectively and employing over 2,000 people each.

As storage and distribution facilities continue to be constructed along the region’s interstates, the Nashville Area Chamber of Commerce has identified the industry as a targeted sector for development. Relatively inexpensive land near interchanges and close proximity to major domestic markets have fueled the growth of logistics and distribution companies in the Nashville area. While the region will always enjoy its centralized geographic location, a number of risks could lead to reduced growth in the sector. Rising congestion along roadways in the region and the growing cost of land and labor could cause future barriers to the industry’s growth in future years.

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8 Nashville Area Chamber
11 http://www.tennessean.com/story/money/2017/02/03/gm-invest-27m-spring-hill-australian-export/97440156/
12 US Census
13 Woods & Poole
14 Nashville Area Chamber of Commerce
Hospitality and Tourism

Nashville’s popularity as a tourist destination has skyrocketed in recent years. By promoting assets like the Ryman Auditorium and Country Music Hall of Fame while attracting multiple conventions and meetings to the new Music City Center, the City of Nashville enjoyed a run of 70 consecutive months with record-breaking hotel tax collection. Annual visitation to the city increased 45% over a 10 year span with 13.9 million visitors in 2016. In the same year, tourists spent almost $6 billion in Nashville and over 65,000 people worked in jobs tied to the tourism industry. The city routinely receives both national and international acclaim from the press like being named one of “8 Essential Trips That Should Be On Your Bucket List” in 2017 by the New York Post.

While Davidson County is easily the largest tourism market in the state, other counties in the region also see significant impacts from visitors either taking advantage of the many attractions throughout the area or taking day trips out from Nashville. Williamson County with historic Franklin ranks 6th in the state with $427 million in travel-related expenditures and supporting about 3,540 jobs. Neighboring Rutherford County also ranks among the state’s top 10. Overall, 103,890 individuals work in the Accommodation and Food Services industry throughout the Greater Nashville region making it the 3rd largest industry in the area. The sector is also projected to be among the top 5 in terms of job growth in the next 30 years employing almost 197,000 by 2050.

Many jobs in the hospitality and tourism industry are at either small businesses or chains with fewer than 50 employees. One large exception is Gaylord Opryland which is the 15th largest employer in the region with 2,500 people. Another top 15 employer in the sector is Cracker Barrel Old Country Store with employees at both its area restaurants and corporate headquarters in Lebanon totaling 2,600 individuals. As new hotels are popping up across the region and the Nashville International Airport undertakes a substantial expansion, the sector has incredible potential to continually break records. However, the area must continue to improve and give visitors a reason to come back or risk losing its popularity. Questions around short-term rental units that have subsidized the region’s insufficient lodging options could cause an impact on visitors. The industry is also starting to see struggles with finding qualified workers due to the area’s low unemployment rates and the sector’s traditionally lower wages.

Music and the Arts

Nashville has long been known throughout the world as Music City and home to the “Mother Church of Country Music”. Since 1925, music fans around the country could tune in and listen to the Grand Ole Opry recorded in Nashville, TN forever linking the city with the style of music. The Nashville area subsequently attracted talented musicians and industry professionals clustering all along the city’s now famous Music Row. A 2012 cluster analysis by the Music City Music Council shows the sector contributes $5.5 billion annually to the local economy supporting over 56,000. While more updated measures are unfortunately not available, the industry has no doubt grown with the rest of the area.

The Nashville region offers more than just music to the arts industry. The National Center for Arts Research’s Arts Vibrancy Index ranked the area 2nd in the nation overall in 2016. Consumer spending on entertainment and recreation in the region also topped $388 million in 2016. While the majority of the region’s Arts, Entertainment, and Recreation jobs exist in Davidson County, Williamson County also employs a number of

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16 Nashville Convention & Visitors Corp.
18 Nashville Convention & Visitors Corp.
19 Woods & Poole
20 Nashville Area Chamber of Commerce
21 http://www.nashville.gov/Portals/0/SiteContent/MayorsOffice/EcDev/docs/NashvilleMusicIndustryStudy.pdf
22 Nashville Area Chamber of Commerce
individuals in the industry. Overall, almost 50% of all the sector’s jobs in the state exist in the Greater Nashville region. The number of employees is anticipated to rise more than 93% by 2050 placing it in the top 5 among in growth among all sectors in the economy.\textsuperscript{23} Music production and publishing is also one of the targeted sectors for growth by the Nashville Area Chamber of Commerce’s Partnership 2020.

More than half of the area’s workers directly involved in the music industry are musicians and singers. Producers, directors, composers, and audio and video equipment technicians round out the rest of the top 5.\textsuperscript{24} Though no one business in the music or arts industry is among the 35 largest employers in the region, the Nashville area is the home to Country Music Television and Great American Country as well as large music labels such as Sony/ATV and the Warner Music Group which announced a 175 job expansion in 2016.\textsuperscript{25} The music and arts industry in the Nashville region benefits tremendously from the clustering of skilled labor, attractiveness to artists, and a lower cost to do business compared to New York and Los Angeles. However, the sector must continue to find revenue sources in an ever-changing market shaped by technology. The Nashville area must also work to preserve a lower cost of living and high quality of life in order to remain attractive to the artists that drive the entire sector.

**Emerging Sectors**

**Corporate Services**

Decision makers, business leaders, and entrepreneurs in the Nashville region have worked diligently to build upon the success of the existing, robust industries in the area to attract corporate and regional headquarters. There is also significant focus on the back office, data centers, and shared services businesses that help support these corporate offices with specific expertise. These efforts have already led to numerous successes in recent years. More than 22,000 people work in the management of companies and enterprises throughout the Nashville region. This is almost 50% of all Tennessee business management professionals. They are supported by 93,000 employees in professional and technical services. While these two combined make up just about 9% of the area’s jobs, they represent 2 of the top 3 highest growth industries in the region. The number of those employed in management roles is anticipated to grow 143.4% with professional and technical jobs growing 102.5% between today and 2050.\textsuperscript{26}

There are 11 corporate headquarters for Fortune 1000 companies located in the area. Some outside the healthcare and automotive realm include Dollar General in Goodlettsville employing 2,050\textsuperscript{27} people, Mars Petcare in Franklin, and Tractor Supply in Brentwood. Williamson County leads the region with over 10,500 business management employees. Davidson County is a close 2\textsuperscript{nd} with more than 8,600 people in management. However, Davidson County tops the area with almost 50,000 of the region’s professional and technical services workers.\textsuperscript{28}

As local corporations expand and the region continues to attract interest from both national and international business, the Nashville Area Chamber of Commerce has identified the corporate services as a targeted sector for development. The region’s business friendly climate and quality of life related to amenities and educational opportunities have been important draws for site selectors looking to helping businesses locate corporate headquarters. Brentwood and Cool Springs has seen such tremendous success with business management and support that office vacancy rates are below 4.5%.\textsuperscript{29} The challenges of providing suitable locations for business

\textsuperscript{23} Woods & Poole
\textsuperscript{24} http://www.nashville.gov/Portals/0/SiteContent/MayorsOffice/EcDev/docs/NashvilleMusicIndustryStudy.pdf
\textsuperscript{26} Woods & Poole
\textsuperscript{27} Nashville Area Chamber of Commerce
\textsuperscript{28} Woods & Poole
\textsuperscript{29} https://www.williamsonchamber.com/WilliamsonInc_Trends2017_WebLowRes.pdf
management professionals coupled with the growing congestion and strains on school systems will be important for local leaders to overcome as they continue to attract new companies.

Evolving Sectors

Industry and Manufacturing
Throughout the Southeastern United States, many areas are witnessing a renaissance in manufacturing. Tennessee has attracted multiple manufacturing businesses to relocate from elsewhere in the country and expand operations from abroad while realizing significant expansions from its existing industries. Advanced Manufacturing excluding the automotive and aerospace sectors now employs more than 78,000 people in the Greater Nashville Region. Overall, manufacturing is the 7th largest employment sector in the area. Rutherford County leads the region with almost 26,000 advanced manufacturing workers. Davidson County is not too far behind with just over 20,000.

Electrolux Home Products, a longtime manufacturer of cooking appliances in Springfield is the 9th largest employer in the area with approximately 3,400 workers. Other appliance companies such as Korean owned LG Electronics have announced new operations in the past year with their $250 million facility in Montgomery County. New flooring manufacturers are also flocking to the area with Dal-Tile’s new facilities in Dickson that will employ a total of 570 people and Chinese owned Wonderful Group’s $150 million new plant in Lebanon. Businesses such as these and many more are providing quality wages to employees and increasing the amount of foreign direct investment in the region.

The Nashville Area Chamber of Commerce has identified Advanced Manufacturing as a targeted sector for growth in Partnership 2020. Despite substantial strength today, manufacturing employment is only estimated to grow about 3% by 2050. The Nashville region continues to be a very attractive location to manufacturers with its overall cost of business, proximity to markets and suppliers, little organized labor, and available land. However, the manufacturing jobs in the modern industry take significant skill. Companies are struggling to find adequately trained workers for their high demand occupations. Increased mechanization will continue to reduce the number of employees needed in production and political factors surrounding unions and incentive programs also have the potential to reduce the strength of the area’s manufacturing industry.

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30 Woods & Poole
31 U.S. Census
32 Woods & Poole
3. Self-Assessment of Strengths and Weakness

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.
4. Plan of Action

The CEDS Plan of Action is designed to achieve 5 key goals that are focused on specific objectives that are aligned with EDA’s mission and priorities. The proposed actions were determined to be the highest of priorities by the CEDS Advisory Board following a review of pre-existing local and regional plans that have been put into place to shape future growth and development.

Goal 1. Educate to Train

The key to a strong economy is a well-trained workforce with an educational background that not only provides the necessary skills to perform the required job duties, but also promotes quality craftsmanship and professionalism.

Objectives

- Create opportunities for school-aged children to envision their role in an evolving economy.
- Prepare post-secondary institutions to train the workforce of tomorrow.
- Retool the underemployed with new skills to reengage in the workplace.
- Ensure job applicants enter the workforce with the necessary soft skills that define professionalism.

Proposed Actions

- Increase how often industry works with educators at the secondary and post-secondary level to make sure they are providing the types of training needed by employers in strong industries.
- Work with Ft. Campbell to educate soldiers looking for employment opportunities to educate transitioning members of the military on careers and training available in high growth industries.
- Promote courses and training options that show the transferable nature of various skills in the workforce.
- Educate employers on the transferability of certain skillsets across sectors.
- Support training programs stressing proper worker responsibilities, habits, communication skills, and reduce drug use.
- Incentivize and encourage the attendance of industry to attend workforce development board meetings, school board meetings, parent teacher conferences, and career days.
- Incentivize and encourage employers to host open houses for students to learn about the careers available in the region.
- Promote the work of workforce development boards, TCATs, and community colleges and utilize them for retraining programs.
- Promote training and outreach programs focusing on high-growth sectors on Ft. Campbell provided by the U.S. Army, Austin Peay, TCATs, and community colleges.
- Work with TCATs and community colleges through programs like THEC’s LEAP and others that promote collaboration between industry and educators while providing funding for training equipment.
- Promote programs like the Drive to 55 and TN Achieves that work to increase the attainment of a 2 year degree or certificate.
- Work with secondary schools and community organizations to provide training opportunities on proper worker responsibilities, worker habits, communication skills, health, and reducing drug use.
Goal 2. Innovate to Lead

Regions that promote an entrepreneurial spirit, ingenuity, and innovation are better positioned to dictate employment and investment trends in their chosen industries.

Objectives

- Ensure there is adequate capital available for businesses to start or expand.
- Provide guidance, training, and mentorship to entrepreneurs.
- Increase the opportunities entrepreneurs have to network and collaborate.
- Ensure low cost overhead to entrepreneurs by supporting the development of affordable office and production locations.

Proposed Actions

- Support entrepreneurs with educational assistance and lending options.
- Promote sound business practices with entrepreneurs through utilizing support centers.
- Assist entrepreneurs with low cost advertising to get their product or idea to market.
- Hold networking events focused on the needs of entrepreneurs.
- Identify sites where entrepreneurs can affordably work and interact through incubators and co-location sites.
- Use social media campaigns to educate the public on new entrepreneurs.
- Work with MADC, ECD, the SBA, and USDA to have a “one-stop shop” for entrepreneurs interested in a new business or start-up capital.
- Promote events and programs that connect entrepreneurs to each other, mentors, and potential customers at chambers of commerce and industrial development boards.
- Promote the programs offered by current incubators like the NEC and support the construction of new locations to serve entrepreneurs in the fields of technology, creative arts, food service, and other sectors.

Goal 3. Invest to Build

The economy must be built upon sound infrastructure that moves people, goods, energy, and resources efficiently throughout the market.

Objectives

- Expand and modernize regional transportation infrastructure to combat the increasing impact of traffic congestion on residents, visitors, businesses.
- Ensure all residents and businesses have an opportunity to access high-speed/broadband internet for social and commercial enterprise.
- Target infrastructure upgrades to support job creation and retention efforts across the region.
- Encourage more private investment into local communities and infrastructure.

Proposed Actions

- Support infrastructure investments that provide added capacity to areas specifically determined to be best suited for development by local and regional plans.
- Promote initiatives at the state and federal levels that support the expansion of broadband access and utilization in rural communities.
• Partner with USDA, EDA, TDEC, TVA, ECD, utilities, and local governments to expand the capacity of local road, sewer, and water infrastructure for commercial, industrial, and residential users.
• Invest in a regional transit system that will reduce congestion and safely move people throughout the region to promote active transportation and reduce car trips.
• Invest in new bike lanes and sidewalk improvements throughout the region to promote safe, active transportation and reduce car trips.
• Make improvements to the region’s airports and grow freight capacity while expanding BNA’s international terminal.
• Work with trucking and rail operators to increase efficiencies for moving goods throughout the region and reducing freight-related delays.
• Focus on investments that improve the quality of life for rural residents.
• Offset the burden new or existing industry places on local road, sewer, and water infrastructure by promoting public-private partnerships to fund improvements.

**Goal 4. Grow to Prosper**

The marketplace must be positioned to expand if it is to maximize the return on investment and provide new opportunities for the next generation.

**Objectives**

• Provide existing business the support they need to grow and expand within the local economy.
• Continue efforts to recruit new companies to Middle Tennessee.
• Ensure that local communities remain competitive in attracting new residents to support economic growth by maintaining quality of life and affordability.

**Proposed Actions**

• Attract new industry, both domestic and foreign, through recruitment efforts and thoughtful incentive packages that will increase the number of developed industrial and commercial properties.
• Maintain relationships with existing industry at the local level and guide them on all available opportunities when they seek expansion in foreign and domestic markets.
• Invest in local agricultural programs that supply fresh foods to citizens in the region and support the construction and expansions of farmers’ markets.
• Provide opportunities in the community for cultural exchange that increases the level of discourse and understanding.
• Work with employers in strong sectors, both existing and looking for relocation, to understand their land and infrastructure needs.
• Promote the various capabilities of small and mid-level suppliers to large companies in strong sectors and encourage communication between them.
• Connect businesses already exporting goods and services to those seeking international markets to network and provide learning opportunities.
• Increase the awareness of natural and existing tourism assets in rural communities and support their operations.
• Invest in affordable and workforce housing projects that provide living options for workers in the region.
• Promote positive news related to the strength and successes of employers and sectors that have a strong presence in the region.
Goal 5. Plan to Sustain

Sustainable growth is a result of intention and long-term planning and will ensure that communities across the region have the opportunity to share in prosperity without sacrificing core values.

Objectives

- Preserve and enhance the unique character and identify of individual communities across the region.
- Protect Middle Tennessee’s natural beauty and environmental quality from the unintended consequences of growth and development.
- Establish a regional vision for growth and development to align local plans and policies with infrastructure investments and economic development initiatives.
- Promote the fiscal health of Middle Tennessee by focusing public-sector spending on priorities that support regional goals and objectives.

Proposed Actions

- Encourage municipal governments to work with their community to adopt and maintain a comprehensive plan and corresponding policies to address growth and development.
- Promote downtown development and character preservation in both large and small cities to increase the attractiveness and quality of life in local communities.
- Promote the creation and implementation of parks and recreation plans at the local and regional level.
- Make sure local utility providers know the needs of their commercial and industrial customers and include utility managers in regular industrial development meetings and chamber of commerce events.
- Ensure planning and zoning boards are aware of the unique needs of some commercial and industrial businesses and make sure all zoning and codes requirements are clear and concise for businesses to easily understand.
- Support local land use plans and zoning that places residential growth for all income levels along corridors for mass transit while balancing development with green space and land preservation.
- Include trade organizations and senior management of employers in strong regional sectors in land use, transportation, and capital improvement planning projects.
- Promote the use of local and regional Wage and Benefit Studies so employers can be better educated on workforce desires and expectations.
- Promote regional and local resiliency plans and policies focusing on reducing the impact of natural disasters.
- Promote the use of capital improvement planning within all local jurisdictions and Keep residents and businesses involved in the development of local land use plans and policies.
5. Implementation and Evaluation

Implementing Partners

The CEDS Plan of Action is intended to help guide the collective efforts of a large and diverse set of implementing partners that represent public and private interests at the local, state, regional, and national levels. Some of the key partners are described below.

Federal Agencies

US Dept. of Commerce; Economic Development Administration
The federal Economic Development Administration focuses exclusively on economic development and plays a critical role in fostering regional economic development efforts in communities across the nation. Through strategic investments and grant offerings that foster job creation and attract private investment, EDA supports development in economically distressed areas of the United States. Its investment policy is designed to establish a foundation for sustainable job growth and the building of durable regional economies throughout the United States.

US Dept. of Agriculture; Rural Development
USDA Rural Development is a federal agency that works to improve the economy and quality of life in rural America. It offers loans, grants, and loan guarantees to support economic development and essential services such as housing, health care, first responder services and equipment, and water, electric and communications infrastructure. It also provides loans to businesses through banks, credit unions and community-managed lending pools. In addition, USDA Rural development provides technical assistance to help communities undertake community empowerment programs.

US Dept. of Transportation
The U.S. Department of Transportation is responsible for the oversight and administration of federal transportation legislation which establishes a framework for planning regulations and grants aimed at investing in the maintenance and expansion of major roadways and public transit systems across the U.S. The Federal Highway Administration (FHWA) of the U.S. Department of Transportation is responsible for administering all federal-aid highway monies available for highway planning and implementation. The Federal Transit Administration (FTA) is responsible for administering all federal-aid monies available through grant allocation for public transportation planning, capital improvement, demonstration and operations.

Tennessee Valley Authority
TVA Economic Development serves the seven states that make up the TVA service area—almost all of Tennessee and parts of Mississippi, Alabama, Georgia, North Carolina, Virginia and Kentucky. Through partnerships with other economic development organizations, it fosters capital investment and job growth in the area. The TVA assists local governments and private companies with site selection, infrastructure improvements, power agreements, and technical assistance.

State Agencies

Tennessee Dept. of Economic & Community Development
The Tennessee Department of Economic & Community Development is the statewide department that focuses on improving the climate for jobs across the state. It provides incentive programs for businesses both already
established in Tennessee to expand and for those looking to relocate. Its officials actively attract domestic and international businesses and provide local governments with economic and community development grants for infrastructure investments and rural initiatives.

**Tennessee Dept. of Transportation**

The Tennessee Department of Transportation (TDOT) is the state agency responsible for managing, operating, and maintaining U.S. Interstates and the state route system. This includes oversight of the design and construction of transportation improvement projects for those roadways, as well as other federal-aid routes when requested to do so on behalf of local communities. Within the context of planning, TDOT is responsible for the preparation of a statewide transportation plan; administration of a data collection program relative to transportation modes and needs; and cooperation with local governments through MPOs in the development of metropolitan area transportation plans.

**Tennessee Dept. of Tourist Development**

The Tennessee Department of Tourist Development leads in the development of strategies and marketing campaigns to promote Tennessee’s historical, cultural, and natural assets to tourists and visitors and oversees the state’s welcome centers along major highways. The Dept. works through the GNRC to coordinate the development of local marketing strategies for Middle Tennessee tourism among local chambers of commerce, convention and visitors bureaus, local governments, and independent operators of tourist destinations.

**Tennessee Housing and Development Agency**

As the State’s housing finance agency, the Tennessee Housing Development Agency (THDA) is a self-sufficient, independently funded, publicly accountable entity of the State of Tennessee. THDA’s mission is to ensure that every Tennessean has access to safe, sound, affordable housing opportunities. THDA works with GNRC and local communities across the state to improve access to affordable and safe housing by providing state and federally-funded grants for low-income housing and home repairs.

**Tennessee Higher Education Commission**

The Tennessee Higher Education Commission oversees the state’s public universities, Colleges of Applied Technology, and community colleges. It develops, implements, and evaluates postsecondary education policies and programs in Tennessee while coordinating the state’s systems of higher education. It focuses on increasing the number of Tennesseans with a postsecondary credential by partnering with the Tennessee Student Assistance Corporation and the TN Promise, TN Reconnect, Advise TN, and the Labor Education Alignment Program.

**Regional Planning Organizations**

**Metropolitan Planning Organization**

Created by federal legislation, MPOs serve as a regional partnership among federal agencies, state government, local elected leadership, local planning and public works directors, transit agencies, the business community, and citizens across the metropolitan region. MPOs lead in the development of a region’s long-range transportation plan and short-range Transportation Improvement Program and contribute to ongoing conversations about issues such as land use, economic development, climate change and the environment, safety and security, and health. The Nashville Area MPO and the Clarksville Urbanized Area MPO work closely with TDOT to set policy, develop plans, and program federal funds for transportation projects in Middle Tennessee.

**Rural Planning Organization**
The purpose of an RPO is to involve local officials in multi-modal transportation planning through a structured process. The goal is to ensure quality, competence, and fairness in the transportation decision-making process carried out by TDOT. The state’s twelve RPOs are Center Hill, Dale Hollow, East Tennessee North, East Tennessee South, First Tennessee, Middle Tennessee, West Tennessee, Northwest Tennessee, South Central East, South Central West, Southeast Tennessee, and Southwest Tennessee.

Economic Development Partners

Tennessee Central Economic Authority
The Tennessee Central Economic Authority, formerly known as the Four Lake Regional Industrial Development Authority, is a region wide organization that promotes economic development initiatives in Macon, Trousdale, Smith, Sumner, and Wilson Counties. The Authority assists local governments within its footprint with various infrastructure grant opportunities and workforce development. It also represents the region at tradeshows and works to attract industry to the area while overseeing the PowerCom Industrial Center.

Middle Tennessee Industrial Development Association
The Middle Tennessee Industrial Development Association is an economic development agency founded by the electric cooperative and municipal power systems in Middle Tennessee. It promotes industrial development in 38 Middle Tennessee counties by providing plant location services in cooperation with the State of Tennessee Department of Economic and Community Development and Tennessee Valley Authority. It also maintains continuous contact with local chambers of commerce, railroad industrial development departments, realtors, banks, and industrial development boards that service the region.

Cheatham Connect
Cheatham Connect, the Cheatham County Joint Economic & Community Development Board, focuses on helping retain and expand existing businesses as well as attracting new job creation and capital investment. It works with regional and state agencies to assist businesses in their start up, relocation or growth. For those looking to open a new business, the office can assist with business plan preparation and identifying financing. Its website includes an online database to help locate commercial, retail or industrial property in the county. The JECDB works closely with the private sector through the Cheatham County Chamber of Commerce on its main initiatives: Corporate Recruitment, Workforce and Education Development, Retail Attraction, Tourism and Senior Living.

Clarksville – Montgomery County Industrial Development Board
The Clarksville – Montgomery County Industrial Development Board supports existing businesses while promoting economic growth through recruitment and workforce development. It partners with local government, the Clarksville Area Chamber of Commerce, Austin Peay State University, and the Aspire Clarksville Foundation to grow Montgomery County’s economy.

Dickson County Chamber of Commerce
The Dickson County Chamber of mission is to maintain and develop an economic climate which creates jobs and enhances the quality of life for all citizens of Dickson County and rural middle Tennessee. The Chamber’s main focus is new and existing industry, retail development, tourism and more. It is dedicated to improving and promoting the quality of life in Dickson County by working to enhance workforce development, education, transportation, small business, leadership and community service.

Gallatin Economic Development Agency
The Gallatin Economic Development Agency works to ensure Gallatin’s prosperity by serving as its catalyst for economic growth through leadership, aggressive marketing, local, regional and state partnerships, education and professionalism. The Agency is the business recruitment, retention, and expansion organization for our community.

Humphreys County Joint Economic Development Board
The Humphreys County Joint Economic Development Board works with the State of Tennessee, local government, and the Tennessee Valley Authority to promote economic development. It works with these partners to grow local businesses, attract new companies, encourage infrastructure investments, and promote workforce development initiatives.

Nashville Area Chamber of Commerce
The Nashville Area Chamber of Commerce exists to facilitate community leadership to create economic prosperity. It does this by representing the private business interests within the greater Nashville region that make up its membership. The Chamber works with government and private partners to promote and expand businesses in the area through recruitment, talent development, research, and public policy advocacy.

City of Portland Community and Economic Development
The City of Portland’s office for Community and Economic Development works with state and local stakeholders to create an environment for industrial growth focusing on diversification and the city’s proximity to the interstate. The office also places significant focus on the growing needs of existing industry. It regularly looks to secure funding for community development and infrastructure projects and promotes workforce development programs at the local Tennessee College of Applied Technology.

Robertson County Chamber of Commerce
The Robertson County Chamber of Commerce began 1938 to promote retail business in the Springfield community. That organization now focuses on the development of its member businesses and the business environment of the communities it serves. In addition, it serves as the primary point of contact for economic development agencies and industries who are looking to expand or relocate in the Robertson County area. The Chamber also serves as the tourism and visitor information bureau for Robertson County.

Rutherford County Chamber of Commerce
The Rutherford County Chamber is a nonprofit organization dedicated to providing leadership to help create the best possible place in which to operate a business, while enhancing the region as a desirable place to live, work and visit, through a wide variety of programs and initiatives. The Chamber works to positively impact the economic vitality and enhance the quality of life in the county, while supporting the growth and prosperity of Chamber member businesses.

Forward Sumner
Forward Sumner Economic Partnership Inc., is a private non-profit organization that provides economic and community development services for Sumner County, TN. Forward Sumner brings together private, public and civic sectors to achieve economic growth and prosperity for all of Sumner County. It exists to unite business, community, and government to promote and foster the economic development and prosperity of Sumner County for the benefit of all citizens.

Williamson Inc.
Williamson, Inc. is a countywide economic development organization and chamber of commerce. It focuses on leadership, education and community by working with current and future businesses in the county while
promoting education initiatives and entrepreneurship. It works to achieve these goals through innovative programs, networking & educational events, beneficial services, vocal business advocacy and business growth opportunities.

**Wilson County Joint Economic Development Board**

The Wilson County JECDB is focused on industrial, office, retail and business recruiting. The recruiting efforts are part of a strategic plan to increase and diversify the overall tax base of Wilson County. It also serves the existing business base for all of the county through business retention efforts and expansion efforts. Much of these efforts are accomplished through the Industry Alliance Partnership and serving as an information source for local businesses. The organization serves as the sole economic development organization for Wilson County and garners support from the local Chambers of Commerce and elected bodies.

**Focus Areas for GNRC**

Undoubtedly, the successful implementation of the CEDS Action Plan will depend on a collaborative effort among many public and private-sector partners. That said, GNRC is committed to ensuring that those partners are supported with access to data and information and provided a stable forum within which to have continued discussions about progress. Specifically, GNRC’s role over the next 5 years will focus on the following areas.

**Improved Coordination and Planning across the Region**

Effective October 1, 2017, GNRC became responsible for carrying out the staffing and administrative functions of the Nashville Area MPO. The MPO is the federally-designated transportation planning agency for Davidson, Maury, Robertson, Rutherford, Sumner, Williamson, and Wilson counties. The MPO fulfills federal transportation planning requirements to ensure TDOT, local governments, and transit agencies remain eligible for federal transportation grants aimed at improving area roadways and transit systems. The integration of the GNRC and MPO is one major step towards improving the efficiency and effectiveness of regional decision-making and to better align transportation planning programs with other regional activities related to economic development, infrastructure investment, and quality of life.

**Expand Partnerships with Non-Profit Organizations**

Across Middle Tennessee and many of its peer regions, non-profit organizations have formed out of concerns at the grass-roots or grass-tops for many of the same issues that are included in the portfolio of regional councils, and many of these groups have staff or programming that often seems duplicative. While it is easy to see this as a source of competition, the presence of these groups should instead be embraced. Public sector organizations have too many political and financial constraints to pretend like they can be the singular source of regional problem-solving, nor is it likely that the resulting solutions will be universally accepted by the greater community it they were.

Collaboration with impassioned interest groups and private-sector expertise is necessary in order to generate robust solutions, and to create the capacity and buy-in needed to adequately implement them. In doing so, however, it is important for the partnership to be adequately framed by ongoing dialogue and a mutual agreement on the strengths and weakness of each group. During the early stages of the 5-year CEDS, the GNRC will pursue the development of a formal compact or memorandum of understanding to document roles and responsibilities, convey powers and limitations, and identify strategies to balance the need for both advocacy and authority in achieving a common vision.
Provide Private-Sector Leaders a Meaningful Seat at the Table to Strengthen Public Policy Initiatives

Some of the most successful regional collaborative models often go a step further in their collaboration with the private-sector by creating meaningful opportunities for business and community leaders to be part of the formal regional policy-making process. Incorporating private citizens onto committees and boards of regional council has several benefits. First, it ensures that public policies are not created in a bureaucratic bubble. Private citizens not only tend to have a different perspective on issues than professional planners, they also think differently about how to communicate those issues with the broader community during planning efforts. Second, the active participation of private-sector leaders in the formal decision-making process could significantly increase the probability of success for public policy initiatives that stem from those efforts, especially those initiatives that promote new strategies or a different approach to addressing community concerns. Initial, or sustained, opposition to policy initiatives is less likely if solutions are championed by public and private-sector leadership alike.

GNRC will continue to invite private-sector leaders to participate on the CEDS Advisory Board, but it also will work to identify opportunities to incorporate such leadership on its governing board and other committees responsible for shaping regional plans and programs.

Invest in Research and Data to Promote Evidence-Based Policies and Programs

While politics are an integral part of any regional planning process, the future is too important to let major investments and policies be shaped by politics alone. The greatest opportunity to balance political influence is through a robust evidence-based program which invests in research and data. Successful regions, or those who are appropriately directing resources at the most effective solutions, rely heavily on data to inform the planning and project prioritization process. Moreover, research and data are key to protecting good public policies from critics. Evidence-based programs allow policy-makers and the broader community to evaluate trade-offs, measure progress, and make the case for increased resources for successful programs. Moreover, transparency and public accountability are much easier goals to reach when decisions are traced back to data instead of politics.

Increased Leveraging of Grants and Investments

The U.S. EDA encourages its partners around the country to develop initiatives that advance new ideas and creative approaches to address rapidly evolving economic conditions. GNRC not only shares these ideals, we believe it is the only way to ensure sustainable economic growth in our region. GNRC staff will incorporate the CEDS goals across all of its programs to ensure that all planning and programming recommendations are aimed at a common vision for growth and development, not just those projects that have the potential for EDA grants.

Focus on Resiliency

As part of the recent SWOT analyses, the CEDS Advisory Board recognized the need for a focus on building resiliency against major weather events or other disasters. Following the 500-year flood event Nashville experienced in 2010, state and local leaders were yet again reminded of how important resiliency planning is for quickly and effectively recovering damaged infrastructure and employers’ facilities. Following the federal disaster declaration, communities worked with the Federal Emergency Management Agency and state’s Department of Economic and Community Development to provide emergency responders with new and improved equipment, facilities, and warning systems. The region bounced back from this extreme weather disaster and emerged with a stronger community and economy despite the recession much of the nation faced.

With the help of partners like the Tennessee Emergency Management Agency located in Nashville, local government officials have continued to update their disaster response plans and successfully implemented
them during smaller-scale weather events. Similarly, increased assistance should be offered to local businesses in order to help them create their own response plans. Many large businesses located in flood zones undertook this process after 2010, however, these plans must stay current and smaller employers should also take these necessary steps.

Not only must a resilient region be prepared for natural disasters, but it should also ensure it is ready for any manmade or external economic events that can cause turmoil as well. While the healthcare and automotive sectors have helped contribute to the Greater Nashville Area’s economic growth, the region must take strides to continually diversify the types of industries and employers. EDA’s cluster mapping tool can help local stakeholders make more informed decisions about variation. Economic development professionals should make efforts to attract future employers and retain those in employment clusters outside the top performers. For example, this would mean encouraging service sector areas like insurance and financial services rather than fully relying on manufacturing and healthcare business support.

**Performance Measures**

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.

- 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.
Appendix A. Map of the Greater Nashville Region
Appendix B. CEDS Advisory Board Roster

- Mayor Howard Bradley, Robertson County
- Mayor Bob Rial, Dickson County
- Reggie Mudd, TN Dept. of Economic and Community Development
- G. C. Hixson, Joint Economic & Community Development Board of Wilson County
- James Fenton, Gallatin Economic Development Agency
- Ginger Hausser, TN Board of Regents
- Amanda Giner, Mid-Cumberland Area Development Corporation
- Bradley Jackson, Tennessee Chamber of Commerce & Industry
- Cal Wray, Partnership, Clarksville-Montgomery County Economic Development Council
- Daryl Phillips, CEcD, Cheatham County Joint Economic & Community Development Board
- Joe Pitts, Planter’s Bank
- Mae Perry, Director, Tennessee College of Applied Technology-Hartsville
- John Hamm, Connected Nation
- Ted Moore, Humphreys County Economic Development Council
- Jack Turner, Jack Turner & Associates
- Jessica Farlow, Project Manager, Tennessee Central Economic Alliance
- Marla Rye, Workforce Essentials, Inc.
- Matt Wilthsire, Nashville Mayor's Office of Economic and Community Development
- Matt Largen, Williamson, Inc.
- Patrick Cammack, Williamson, Inc.
- Michelle Lacewell, Nashville MPO
- Denise Geminden, City of Portland
- Courtney Ross, Nashville Area Chamber of Commerce
- Andrea Arnold, Nashville Convention and Visitors Bureau
## Appendix C. Regional Economic Indicators

### Figure 1. Population Trends by County

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<th>2020</th>
<th>2030</th>
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<td>263,776</td>
<td>341,785</td>
<td>424,885</td>
<td>516,789</td>
</tr>
<tr>
<td>Stewart</td>
<td>12,370</td>
<td>13,337</td>
<td>13,917</td>
<td>14,975</td>
<td>15,766</td>
</tr>
<tr>
<td>Sumner</td>
<td>130,449</td>
<td>161,249</td>
<td>195,187</td>
<td>230,233</td>
<td>265,710</td>
</tr>
<tr>
<td>Trousdale</td>
<td>7,259</td>
<td>7,862</td>
<td>8,537</td>
<td>9,361</td>
<td>10,043</td>
</tr>
<tr>
<td>Williamson</td>
<td>126,638</td>
<td>184,143</td>
<td>258,855</td>
<td>359,325</td>
<td>488,026</td>
</tr>
<tr>
<td>Wilson</td>
<td>88,809</td>
<td>114,671</td>
<td>149,638</td>
<td>190,432</td>
<td>237,115</td>
</tr>
<tr>
<td><strong>GNRC Region</strong></td>
<td><strong>1,411,725</strong></td>
<td><strong>1,728,552</strong></td>
<td><strong>2,104,882</strong></td>
<td><strong>2,502,963</strong></td>
<td><strong>2,932,900</strong></td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau, Woods and Poole Economics, Inc. (2017)

### Figure 2. Employment Trends by County, 2015

<table>
<thead>
<tr>
<th>County</th>
<th>2000</th>
<th>2010</th>
<th>2020</th>
<th>2030</th>
<th>2040</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheatham</td>
<td>12,136</td>
<td>14,016</td>
<td>15,542</td>
<td>17,978</td>
<td>19,430</td>
</tr>
<tr>
<td>Davidson</td>
<td>522,651</td>
<td>516,929</td>
<td>646,324</td>
<td>742,017</td>
<td>828,191</td>
</tr>
<tr>
<td>Dickson</td>
<td>23,215</td>
<td>21,396</td>
<td>26,350</td>
<td>29,729</td>
<td>32,060</td>
</tr>
<tr>
<td>Houston</td>
<td>2,662</td>
<td>2,900</td>
<td>2,922</td>
<td>3,287</td>
<td>3,590</td>
</tr>
<tr>
<td>Humphreys</td>
<td>8,412</td>
<td>8,367</td>
<td>9,049</td>
<td>9,798</td>
<td>10,406</td>
</tr>
<tr>
<td>Montgomery</td>
<td>55,514</td>
<td>63,022</td>
<td>78,982</td>
<td>96,456</td>
<td>115,408</td>
</tr>
<tr>
<td>Robertson</td>
<td>24,995</td>
<td>27,319</td>
<td>36,344</td>
<td>42,457</td>
<td>48,554</td>
</tr>
<tr>
<td>Rutherford</td>
<td>105,139</td>
<td>132,239</td>
<td>175,635</td>
<td>212,641</td>
<td>251,689</td>
</tr>
<tr>
<td>Stewart</td>
<td>4,153</td>
<td>4,735</td>
<td>4,912</td>
<td>5,378</td>
<td>5,719</td>
</tr>
<tr>
<td>Sumner</td>
<td>66,469</td>
<td>64,958</td>
<td>87,105</td>
<td>104,131</td>
<td>120,198</td>
</tr>
<tr>
<td>Trousdale</td>
<td>2,006</td>
<td>2,554</td>
<td>2,874</td>
<td>3,370</td>
<td>3,897</td>
</tr>
<tr>
<td>Williamson</td>
<td>87,897</td>
<td>135,989</td>
<td>203,370</td>
<td>274,634</td>
<td>359,946</td>
</tr>
<tr>
<td>Wilson</td>
<td>42,421</td>
<td>53,444</td>
<td>69,068</td>
<td>87,697</td>
<td>108,668</td>
</tr>
<tr>
<td><strong>GNRC Region</strong></td>
<td><strong>957,670</strong></td>
<td><strong>1,047,868</strong></td>
<td><strong>1,358,477</strong></td>
<td><strong>1,629,573</strong></td>
<td><strong>1,907,756</strong></td>
</tr>
</tbody>
</table>

**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, 2017

<table>
<thead>
<tr>
<th>County</th>
<th>Labor Force</th>
<th>Employed</th>
<th>Unemployed</th>
<th>UE Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheatham</td>
<td>21,210</td>
<td>20,490</td>
<td>720</td>
<td>3.4%</td>
</tr>
<tr>
<td>Davidson</td>
<td>391,030</td>
<td>378,940</td>
<td>12,090</td>
<td>3.1%</td>
</tr>
<tr>
<td>Dickson</td>
<td>25,720</td>
<td>24,770</td>
<td>950</td>
<td>3.7%</td>
</tr>
<tr>
<td>Houston</td>
<td>3,110</td>
<td>2,910</td>
<td>200</td>
<td>6.3%</td>
</tr>
<tr>
<td>Humphreys</td>
<td>8,560</td>
<td>8,160</td>
<td>410</td>
<td>4.7%</td>
</tr>
<tr>
<td>Montgomery</td>
<td>9,760</td>
<td>76,080</td>
<td>3,680</td>
<td>4.6%</td>
</tr>
<tr>
<td>Robertson</td>
<td>36,260</td>
<td>34,870</td>
<td>1,400</td>
<td>3.9%</td>
</tr>
<tr>
<td>Rutherford</td>
<td>167,540</td>
<td>161,830</td>
<td>5,710</td>
<td>3.4%</td>
</tr>
<tr>
<td>Stewart</td>
<td>5,120</td>
<td>4,830</td>
<td>290</td>
<td>5.7%</td>
</tr>
<tr>
<td>Sumner</td>
<td>95,060</td>
<td>91,870</td>
<td>3,190</td>
<td>3.4%</td>
</tr>
<tr>
<td>Trousdale</td>
<td>3,910</td>
<td>3,760</td>
<td>150</td>
<td>3.9%</td>
</tr>
<tr>
<td>Williamson</td>
<td>115,790</td>
<td>112,140</td>
<td>3,660</td>
<td>3.2%</td>
</tr>
<tr>
<td>Wilson</td>
<td>69,330</td>
<td>37,030</td>
<td>2,300</td>
<td>3.3%</td>
</tr>
<tr>
<td><strong>GNRC Region</strong></td>
<td><strong>952,400</strong></td>
<td><strong>957,680</strong></td>
<td><strong>34,750</strong></td>
<td><strong>4.0%</strong></td>
</tr>
</tbody>
</table>

Source: TN Labor and Workforce Development, June 2017

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, 2015

<table>
<thead>
<tr>
<th>County</th>
<th>HS Diploma or better</th>
<th>Bachelor's Degree or better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheatham</td>
<td>84.0%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Davidson</td>
<td>87.3%</td>
<td>37.3%</td>
</tr>
<tr>
<td>Dickson</td>
<td>83.5%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Houston</td>
<td>79.5%</td>
<td>10.5%</td>
</tr>
<tr>
<td>Humphreys</td>
<td>83.6%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Montgomery</td>
<td>91.9%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Robertson</td>
<td>86.2%</td>
<td>17.8%</td>
</tr>
<tr>
<td>Rutherford</td>
<td>90.3%</td>
<td>30.1%</td>
</tr>
<tr>
<td>Stewart</td>
<td>86.6%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Sumner</td>
<td>89.2%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Trousdale</td>
<td>78.7%</td>
<td>14.3%</td>
</tr>
<tr>
<td>Williamson</td>
<td>95.3%</td>
<td>55.7%</td>
</tr>
<tr>
<td>Wilson</td>
<td>89.4%</td>
<td>28.3%</td>
</tr>
<tr>
<td>GNRC Region</td>
<td>86.6%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Tennessee</td>
<td>85.5%</td>
<td>24.9%</td>
</tr>
<tr>
<td>United States</td>
<td>86.7%</td>
<td>29.8%</td>
</tr>
</tbody>
</table>

Source: 2015 American Community Survey 5-Year Estimates

Figure 8. Export Sectors for Nashville-Davidson-Franklin-Murfreesboro MSA, 2016

<table>
<thead>
<tr>
<th>Export Sector</th>
<th>Export Value ($Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Equipment</td>
<td>$3,917</td>
</tr>
<tr>
<td>Computer and Electronic Products</td>
<td>$2,181</td>
</tr>
<tr>
<td>Chemicals, Equipment, Appliances and Co</td>
<td>$581</td>
</tr>
<tr>
<td>Machinery, except electrical</td>
<td>$467</td>
</tr>
</tbody>
</table>

Source: September 2016 U.S Department of Commerce - International Trade Administration

Figure 9. Export Markets for Nashville-Davidson-Franklin-Murfreesboro MSA, 2016

<table>
<thead>
<tr>
<th>Export Market</th>
<th>Export Value ($Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>$4,024</td>
</tr>
<tr>
<td>Mexico</td>
<td>$1,473</td>
</tr>
<tr>
<td>China</td>
<td>$445</td>
</tr>
<tr>
<td>Japan</td>
<td>$422</td>
</tr>
</tbody>
</table>

Source: 2016 U.S Department of Commerce - International Trade Administration
Appendix D. FACT Sheet Handout
CEDS FACT SHEET
Greater Nashville Region’s Comprehensive Economic Development Strategy

What is the CEDS?
The Comprehensive Economic Development Strategy (CEDS) is a regional blueprint for creating a stronger, more diverse economy. It is developed by the Greater Nashville Regional Council through a continuous planning process that engages members of both the public and private sectors.

The CEDS provides information to business and government leaders as they work cooperatively to set priorities for investments in both physical and human capital, in an effort to keep Middle Tennessee prepared for the constantly changing global economy.

Why develop a strategy?
Everybody within the greater Nashville region benefits when government and business leaders throughout the 13 counties come together to build relationships and brainstorm on economic development strategies.

The CEDS helps ensure that policy-makers and investors are working together to create a strong future for Middle Tennessee as a whole. In addition, local governments or organizations seeking to qualify for U.S. Economic Development Administration (EDA) grant 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 more than $10 million in EDA grant funds. Without an EDA approved CEDS, the region would have missed out on these grant opportunities.

What are the 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. GNRC is the federally-designated Economic Development District for the greater Nashville area and is charged with the development and adoption of the region’s strategy document.

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 economic development conditions across 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;
- 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. The GNRC also must submit an updated performance report annually to the EDA.
Who is involved in the process?

The process is facilitated by the GNRC and guided by a CEDS Planning Committee comprised of economic development experts from public and private organizations throughout the region. The committee also includes business owners, educators, workforce development boards, minority representatives, and elected officials.

The CEDS Planning Committee guides the discussion, develops the goals and priorities, suggests data-driven measures, and ultimately endorses the document for adoption. CEDS documents are adopted by area mayors and county executives along with other members of the board of the GNRC.

Where does the strategy go from here?

This year marks five years since the last major rewrite of the CEDS. In order to comply with EDA requirements, a brand new document must be submitted by September 30, 2017. Therefore, the CEDS Planning Committee will need to meet again in the spring and summer of 2017 to give guidance to GNRC staff for what to include.

It is GNRC's goal to expand the local relevance of the CEDS by better integrating the economic development plans of local communities, area chambers of commerce, and other economic development officials.

Work on this new strategy will begin in August 2016 and be completed in September 2017. The result will be a more meaningful and visible document for regional decision-makers.

What is the history of the Greater Nashville Region's CEDS?

1965

1971
MCOCG/DD produces its first Overall Economic Development Program for the EDA. This document was the precursor to what would later become the CEDS.

1988
Legislation passed by the State Legislature changes the name of the MCOG/DD the Greater Nashville Regional Council.

1998
The Economic Development Administration Reform Act of 1998 provides a large scale revision of the Public Works and Economic Development Act of 1965 and establishes the CEDS.

2012
Greater Nashville Regional Council adopts its most recent large scale rewrite of the CEDS.

2015
New rulemaking for a simplified, four-part CEDS goes into effect; most recent annual update is submitted to EDA.

2017
Major rewrite of the CEDS due.

For more information about the Greater Nashville Regional Council or the Comprehensive Economic Development Strategy contact Matt Von Lunen, division administrator for planning, research and development at (615) 862-8849 or mvonlumen@gnrc.org.

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A regional planning and economic development agency serving 13 counties and 52 cities.