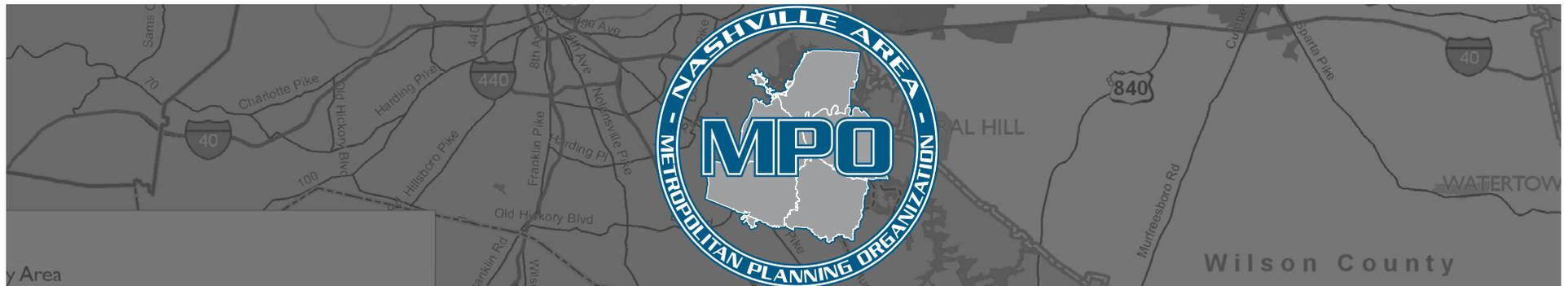




Nashville Area Metropolitan Planning Organization Tri-County Transportation & Land Use Study of Robertson, Sumner, Wilson Counties

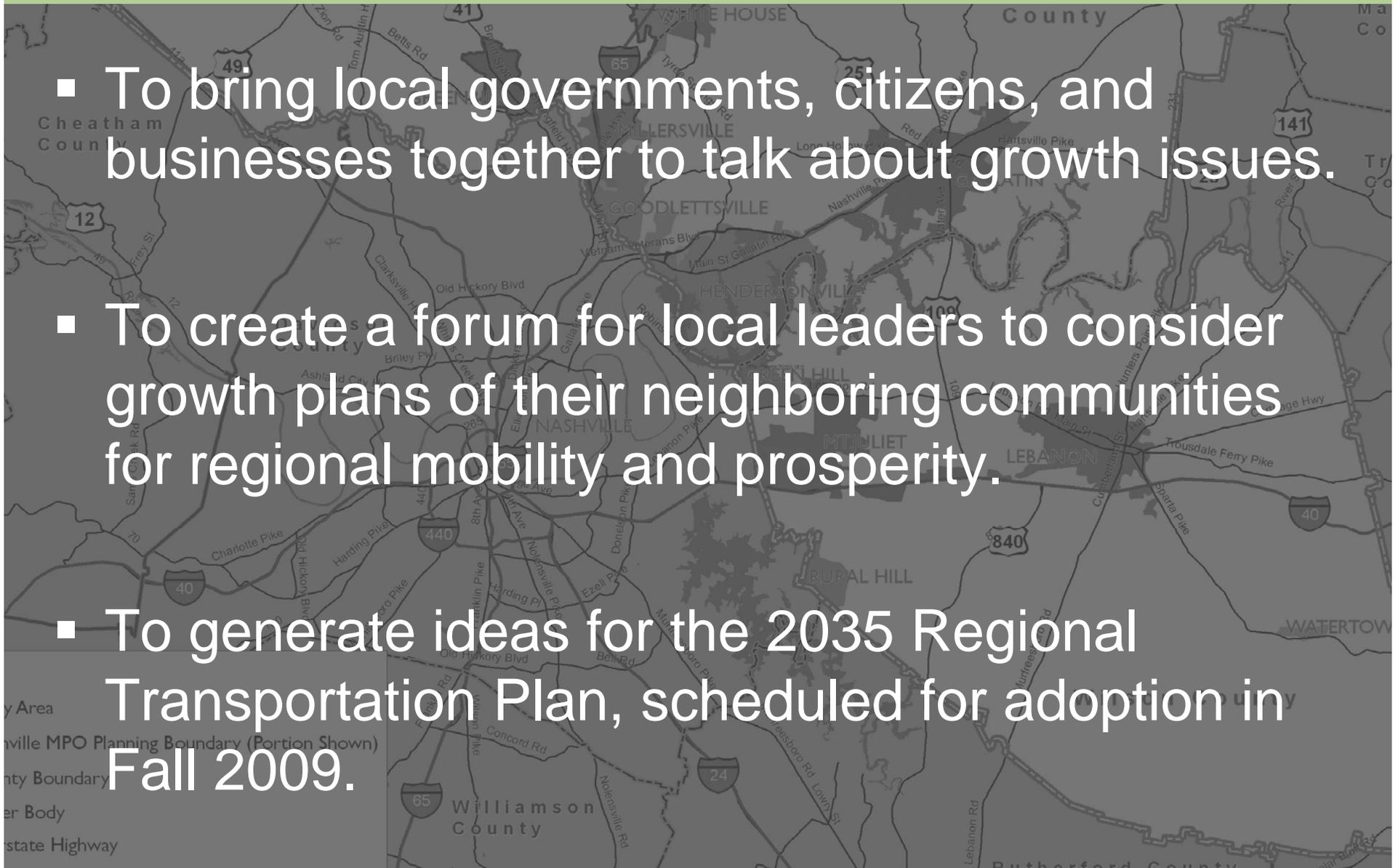
Community at Large Sessions: Challenges and Opportunities
September 30, October 1-2, 2008



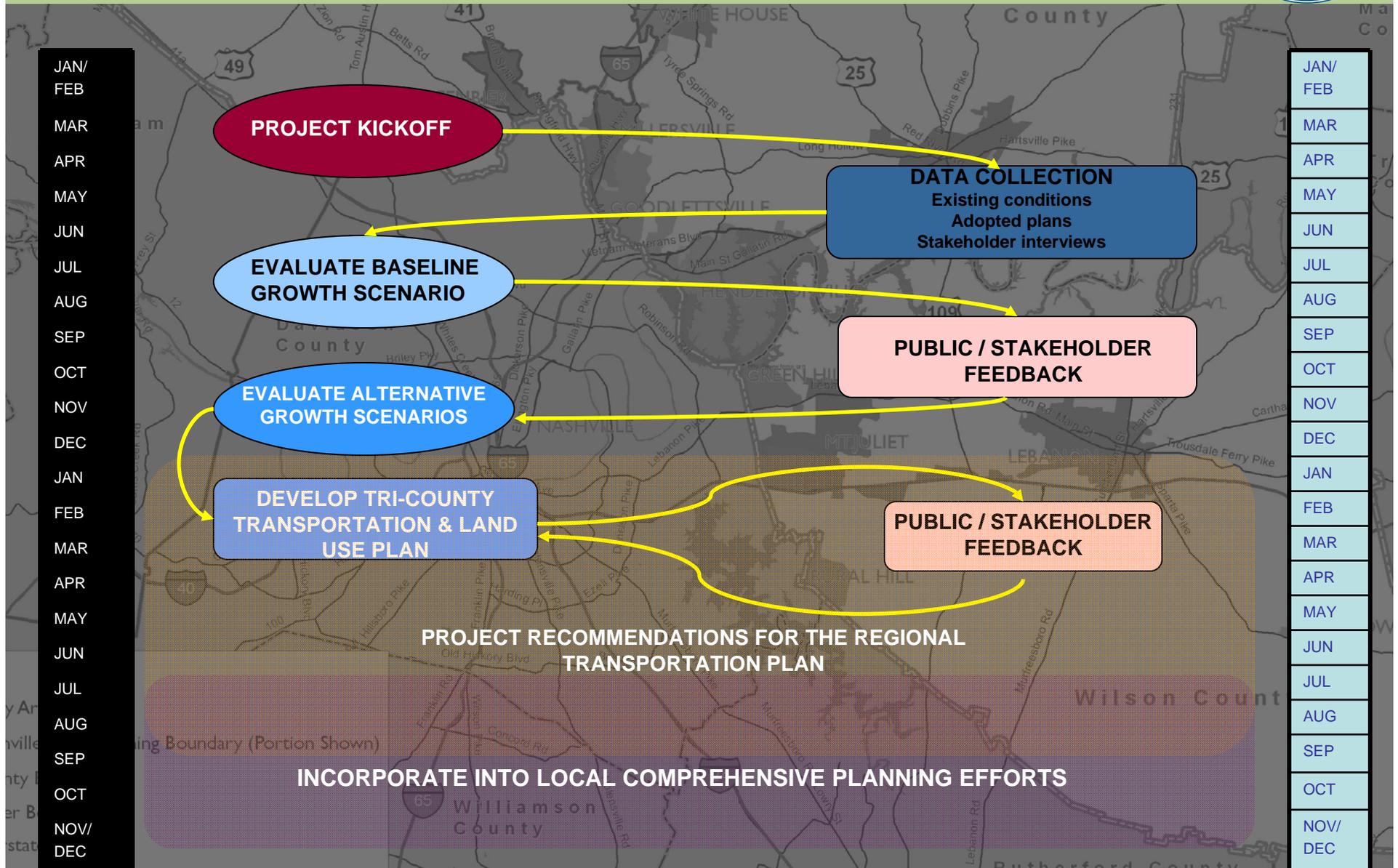
LandDesign • Kimley-Horn & Associates, Inc.
Basile Baumann Prost Cole & Associates, Inc. • Sterling Communications

Purpose – Why are we here?

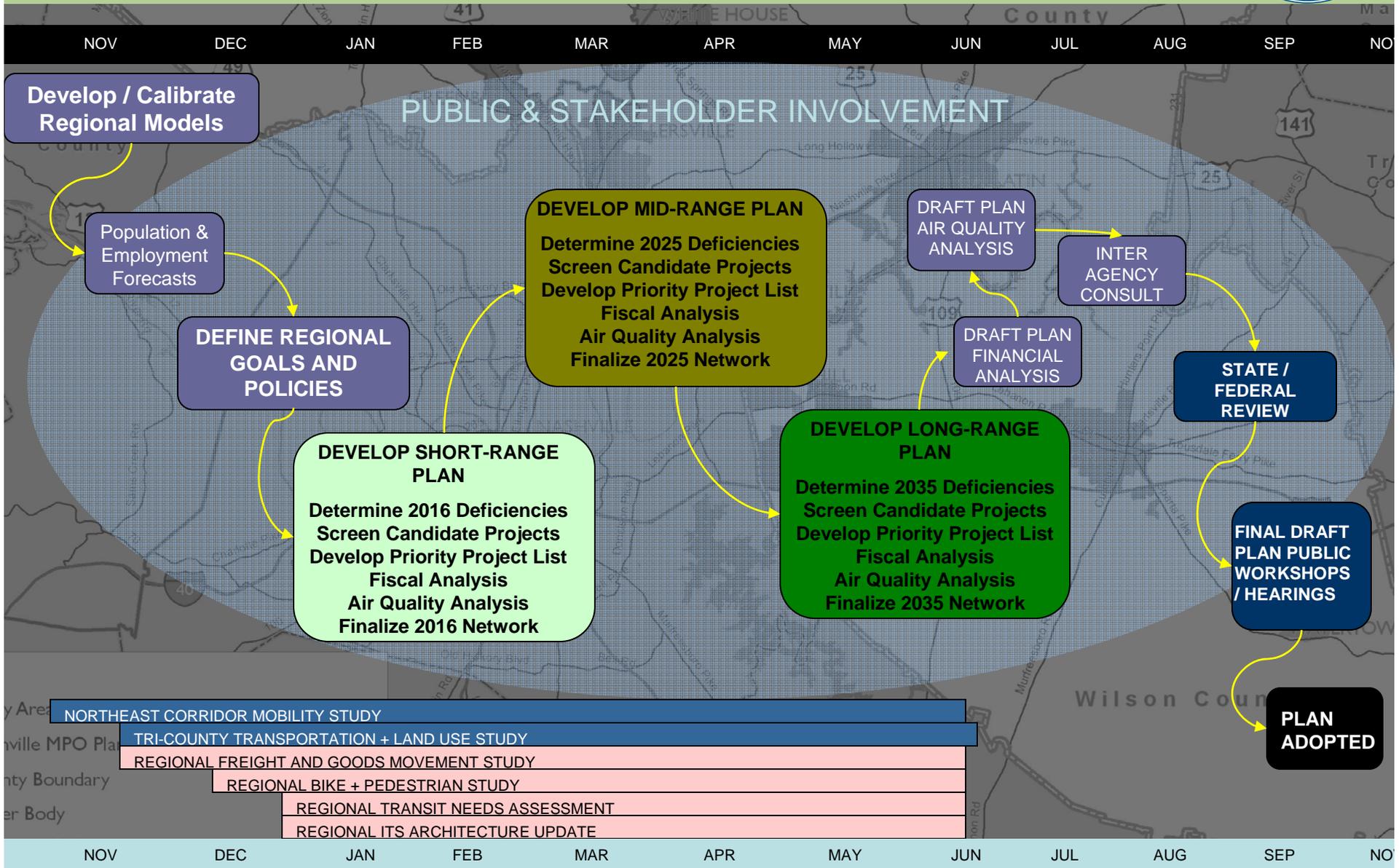
- To bring local governments, citizens, and businesses together to talk about growth issues.
- To create a forum for local leaders to consider growth plans of their neighboring communities for regional mobility and prosperity.
- To generate ideas for the 2035 Regional Transportation Plan, scheduled for adoption in Fall 2009.



Tri-County Study Process



Metropolitan Planning Organization Process: 2035 Regional Transportation Plan





The Project Team

Nashville Area Metropolitan Planning Organization

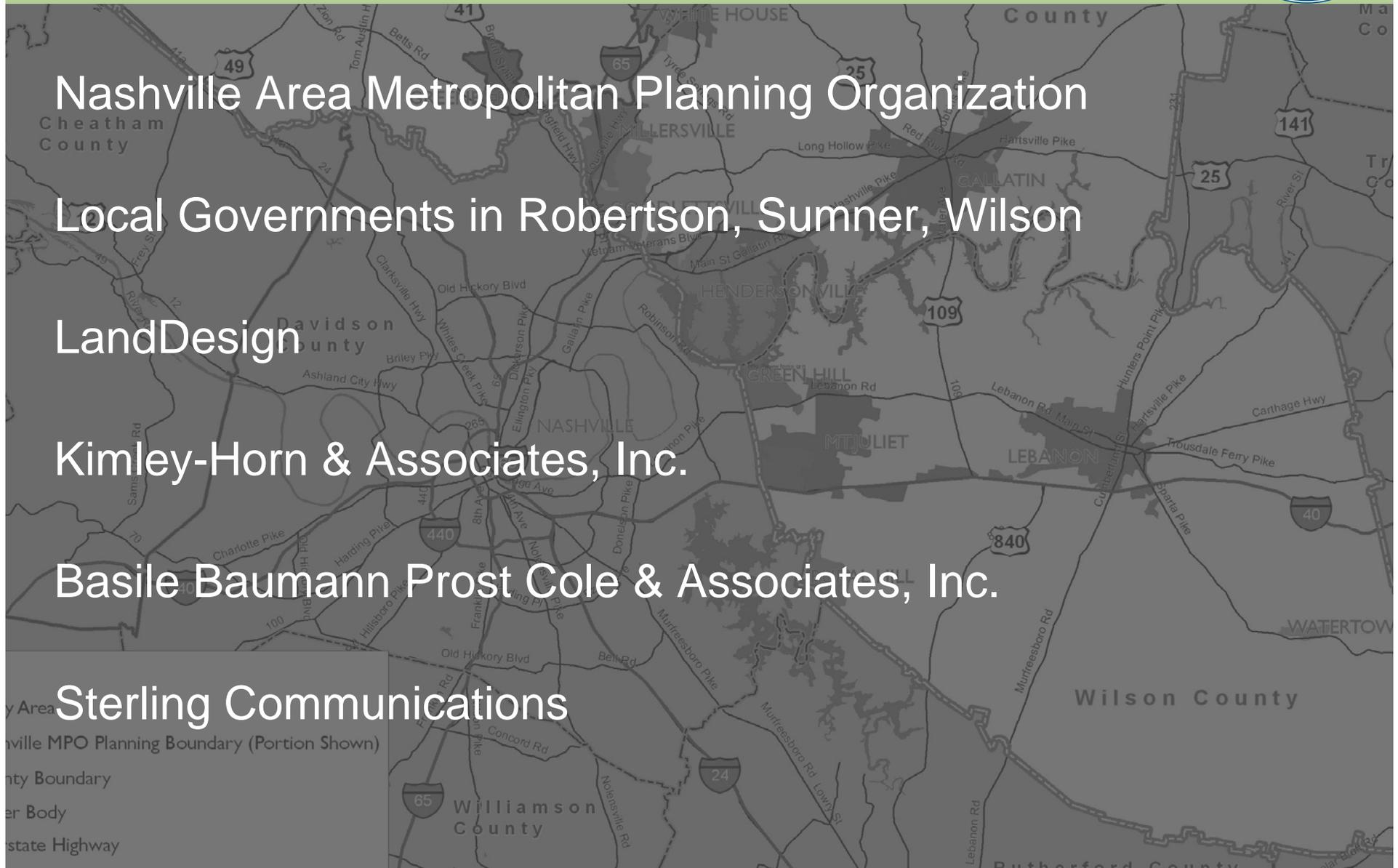
Local Governments in Robertson, Sumner, Wilson

LandDesign

Kimley-Horn & Associates, Inc.

Basile Baumann Prost Cole & Associates, Inc.

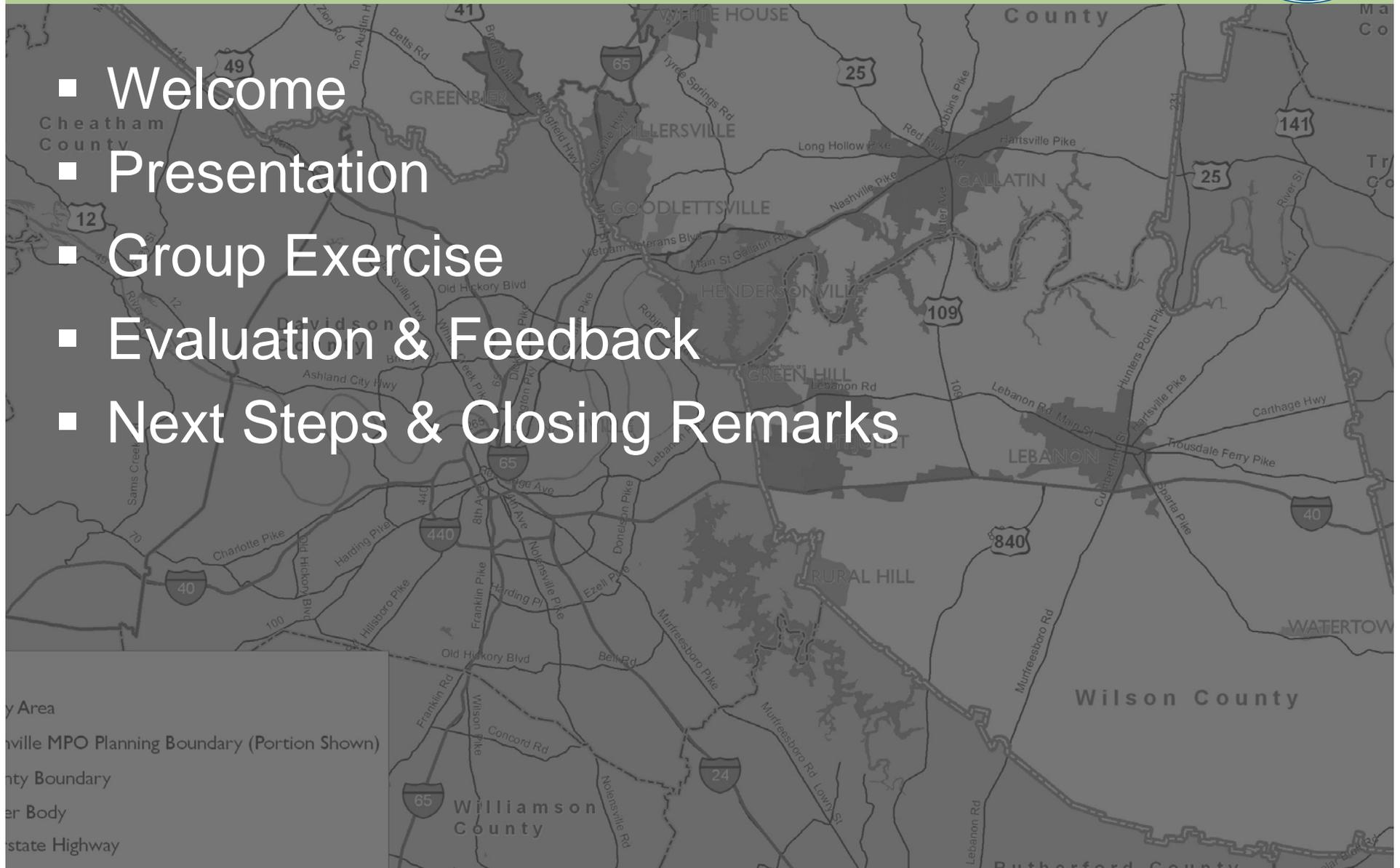
Sterling Communications



Agenda



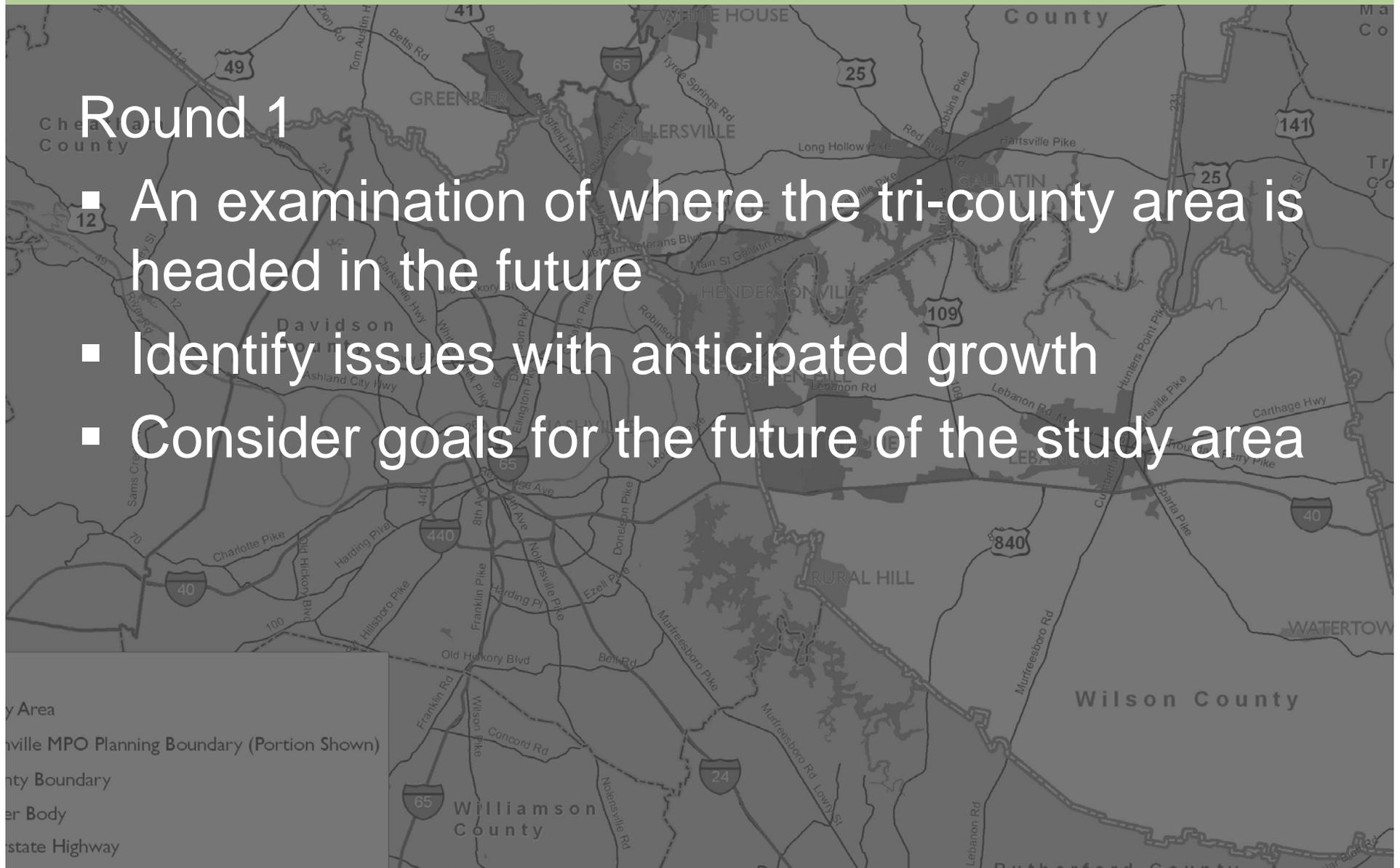
- Welcome
- Presentation
- Group Exercise
- Evaluation & Feedback
- Next Steps & Closing Remarks



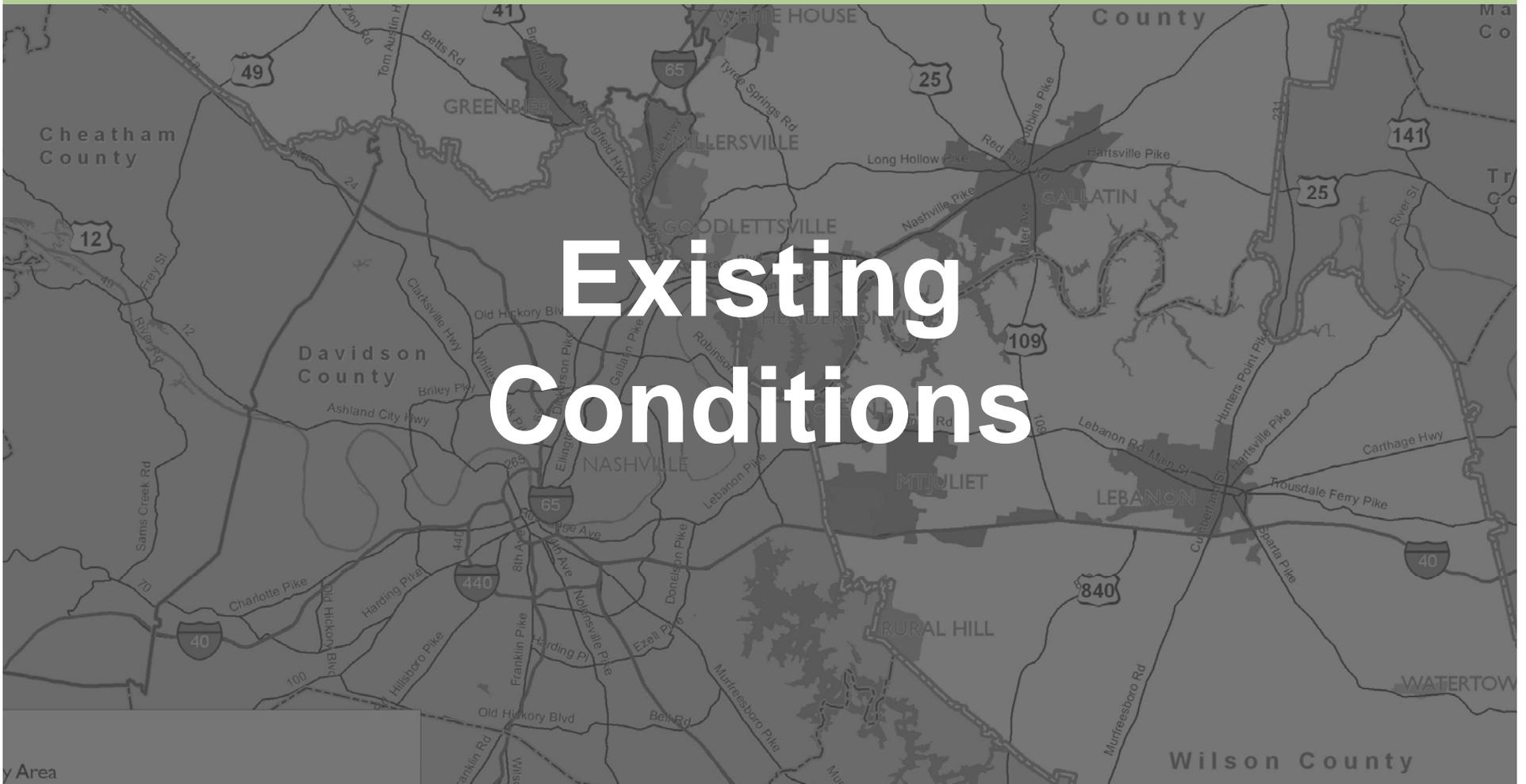
Objectives / Outcomes of Session

Round 1

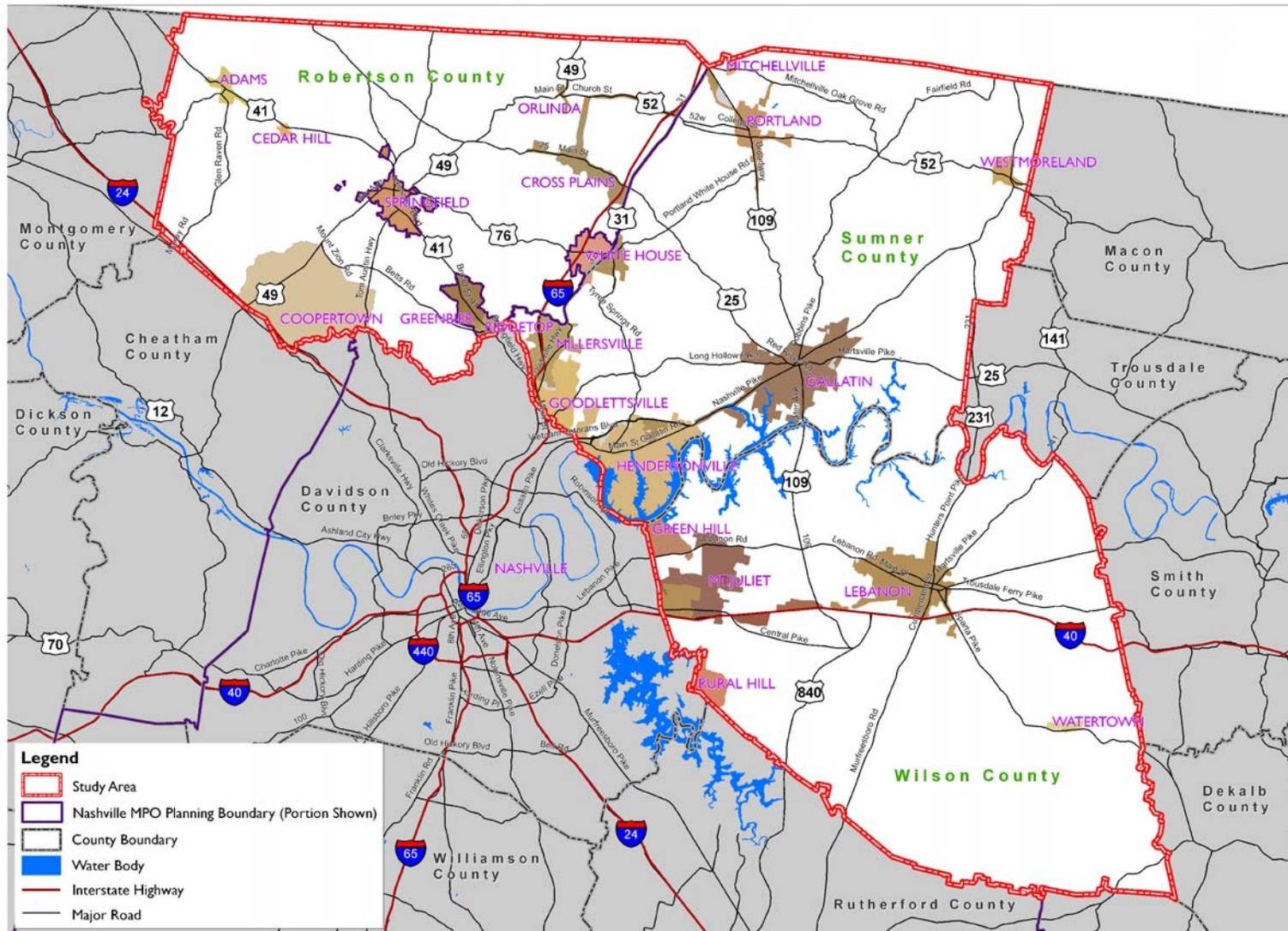
- An examination of where the tri-county area is headed in the future
- Identify issues with anticipated growth
- Consider goals for the future of the study area



Existing Conditions



Study Area Context



CONTEXT MAP
Tri-County Transportation and Land Use Study
Robertson, Sumner, and Wilson Counties, Tennessee

1 inch equals 9,000 feet
0 1 2 4 Miles
JUNE 2008 | 104 x 102003
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Economic & Market Analysis Preliminary Findings

- Regional Context & Asset Overview
- Economic & Demographic Profile
- Office Market
- Industrial Market
- Retail Market
- Residential Market
- Future Demand Analysis



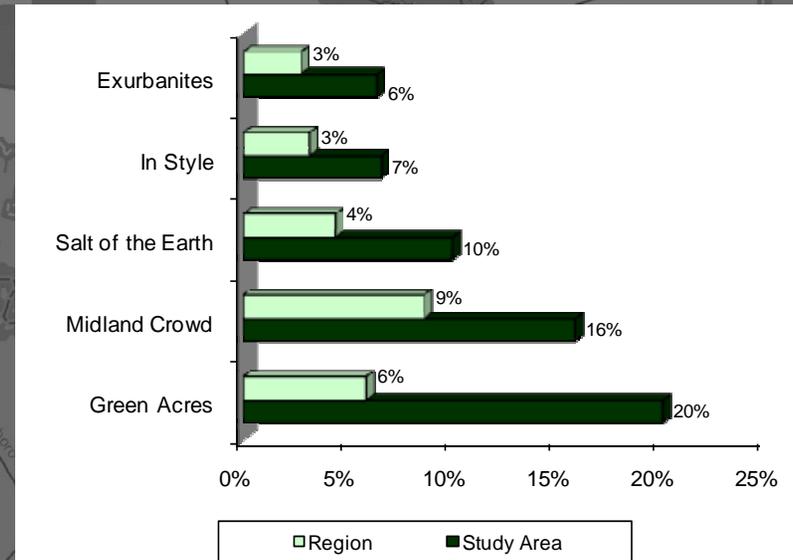
Regional Overview

- Key Findings - Nashville Region Strengths
 - Low Cost of Living
 - High Quality of Life
 - Supportive Business Climate
 - High Quality Labor Force
- Top Industries and Economic Drivers
 - Nationally prominent in Healthcare, Logistics and Music
 - Manufacturing employment strong relative to other benchmark regions
 - Healthcare Services Industry Capital
 - #2 ranked logistics Metro areas in nation
 - \$4 Billion economic impact of music industry in region

Economic and Demographic Profile

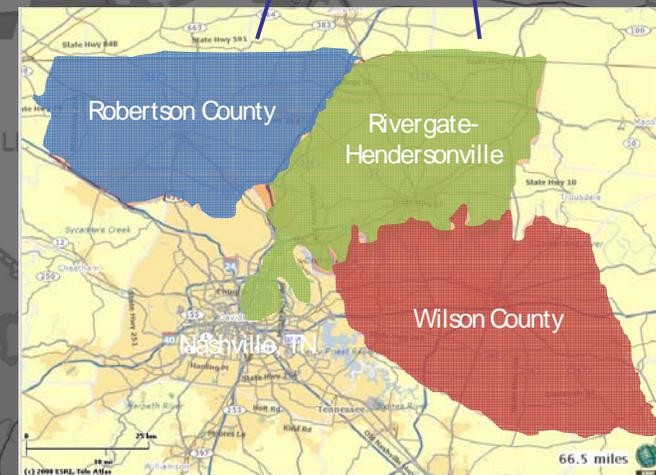
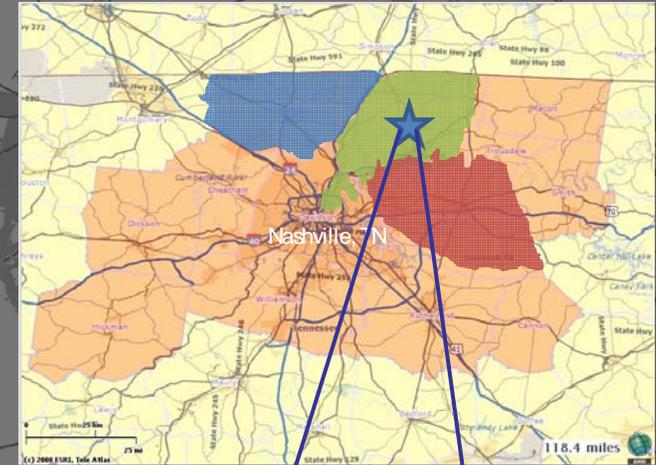
- **Tri-County study area**
 - 22% of regional population
 - Median household income 14% less
 - More family households
 - Nearly half of households in Sumner County
- **Top Tapestry Segments**
 - Married couples
 - Suburban and rural living
 - Home and garden improvement
 - Outdoor recreation

	Tri-County Study Area	Nashville MSA	Study Area as % of MSA
Population	329,390	1,508,520	21.8%
Households	127,540	604,550	21.1%
Median Household Income	\$82,822	\$96,268	86.0%
Average Household Size	2.57	2.43	105.8%



Industry and Labor

- **Tri-County Labor Force**
 - Predominately employed in Services (40%) followed by Manufacturing and Retail Trade (13% each)
 - 21% of regional labor force
- **Tri-County At-Place Employment**
 - Dominated by Services (27%) followed by Manufacturing (16%)
 - Employment concentrated in Sumner (41%) and Wilson (38%)
 - 14% of regional employment
 - Tri-County employment projected to grow faster than region – 2008-2030



Office Market Overview



■ Tri-County Study Area

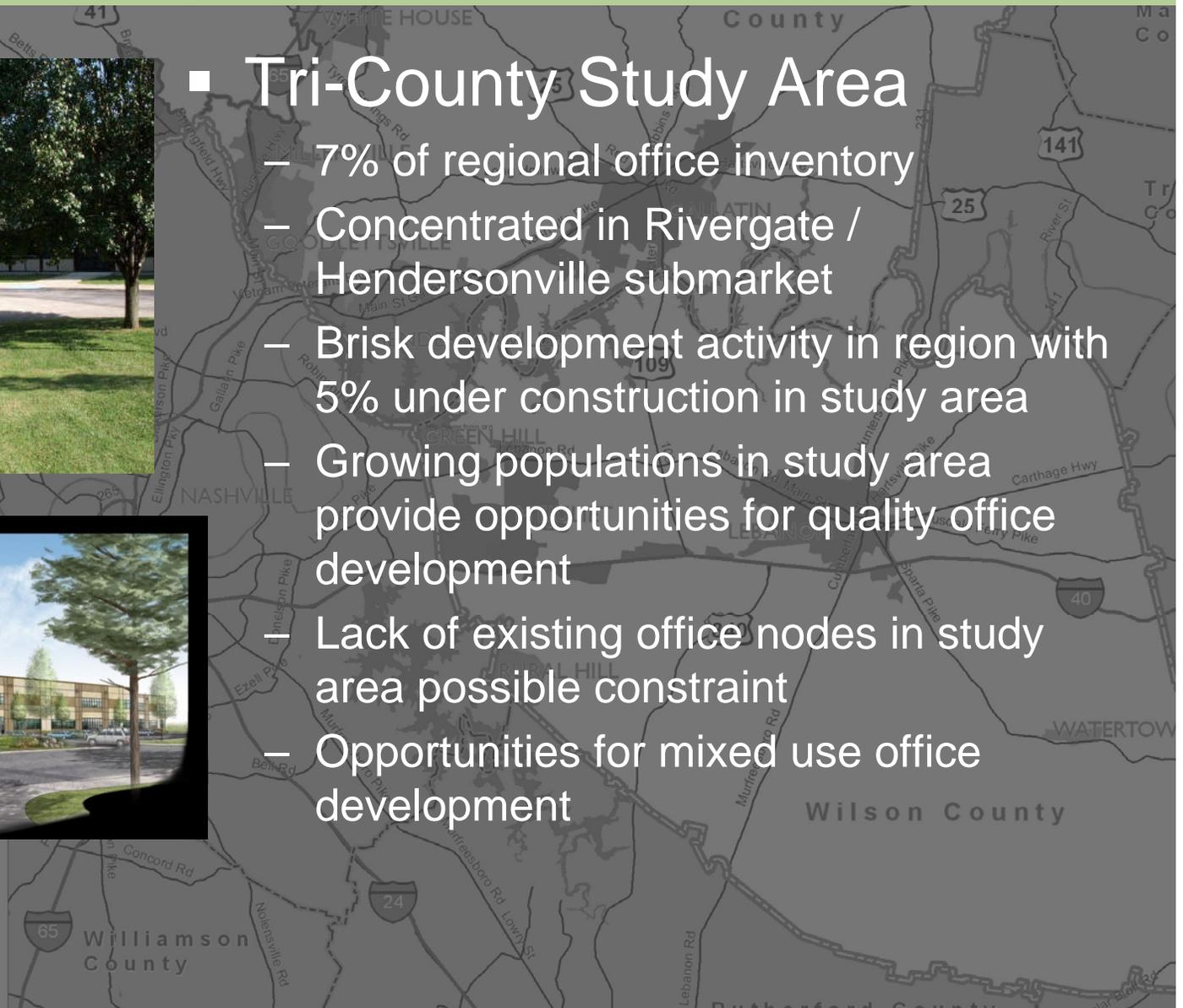
- 7% of regional office inventory
- Concentrated in Rivergate / Hendersonville submarket
- Brisk development activity in region with 5% under construction in study area
- Growing populations in study area provide opportunities for quality office development
- Lack of existing office nodes in study area possible constraint
- Opportunities for mixed use office development

ville MPO Planning Boundary (Portion Shown)

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state Highway



Industrial Market Overview

■ Tri-County Study Area

- 30% of regional industrial inventory
- Concentrated in North Industrial submarket (67% of study area)
- Robust activity under construction - 3 M SF under construction (region)
- Emergence of Wilson County as industrial hub
- Regionally strong warehouse sector
- Focus recruitment on national headquarters and regional offices of large distribution operators to fill new space



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Retail Market Overview

■ Tri-County Study Area

- 15% of regional industrial inventory
- Concentrated in Hendersonville-Gallatin and Mt Juliet-Lebanon area
- Strong development activity in region
- Attraction of major employers stimulates retail spin-off demand in region
- Low vacancy rates and strong developer interest in Tri-County Study Area indicates solid demand for new space
- Retain high quality of life with amenity-rich mixed-use retail, housing, and employment centers



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state Highway

Residential Market



- Tri-County Study Area
 - Desirable residential communities in Tri-County study area
 - 20% of regional housing stock
 - Primarily single-family homes (78%)
 - Pricing on par with region
 - 25% of regional residential development under construction in study area
 - Half of study area activity in Sumner Co
 - Need to ensure adequate infrastructure in selected high growth areas
 - Range of home values provides variety of housing options
 - Substantial retail and mixed use offerings provides amenities to attract residents

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Williamson County

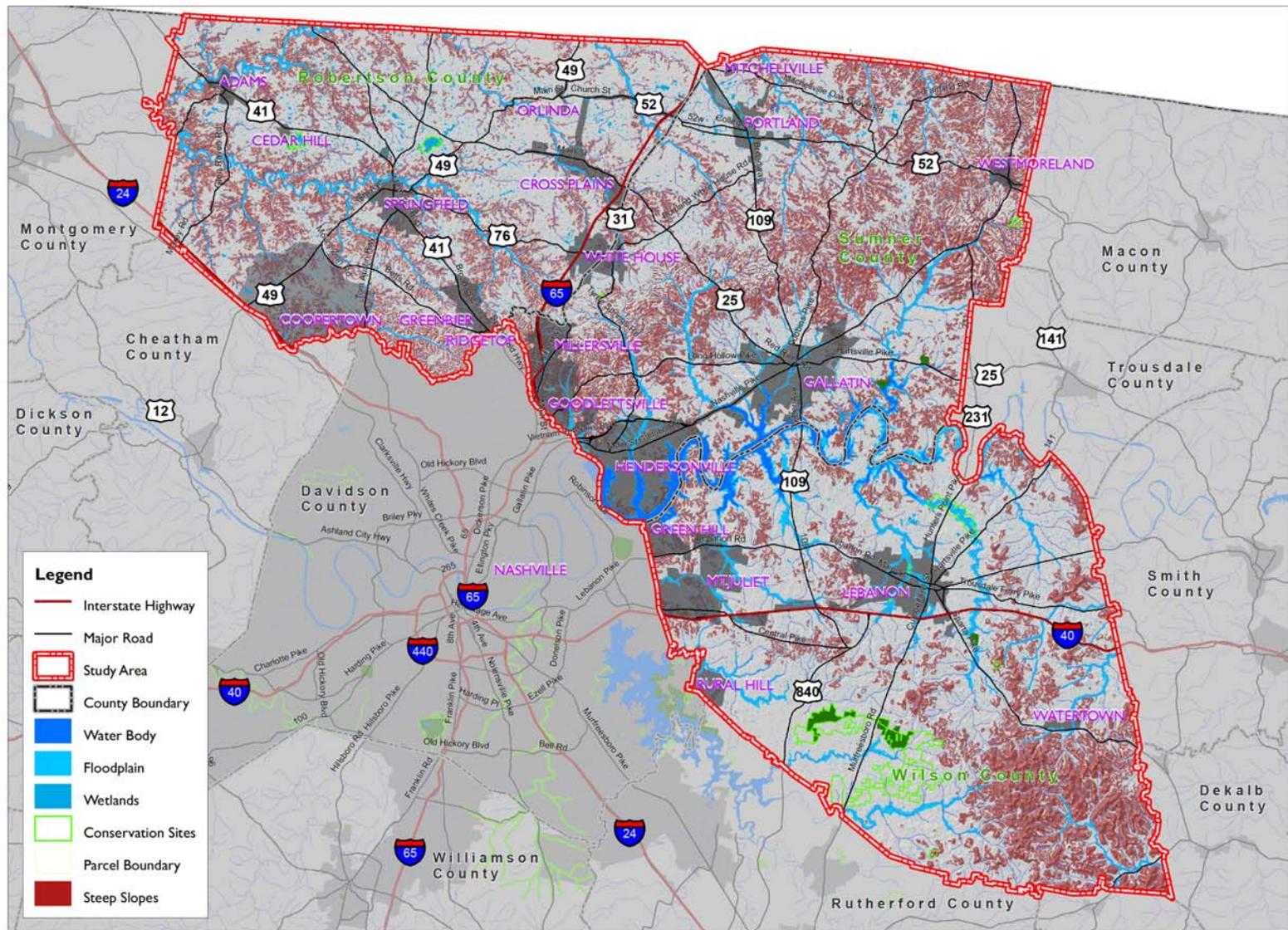
Future Demand Analysis

• Tri-County Study Area

- Function of job and household growth
- Projected from 2008 to 2035
- Steady growth in all sectors projected
- Future job growth most prominent in industrial sector

	Job/HH Growth (2008-2035)	Total Demand (2008-2035)	Annual Demand (2008-2035)
TRI-COUNTY STUDY AREA			
Office	17,219	4.3 M SF	160 K SF
Industrial	32,290	11.3 M SF	418 K SF
Retail	17,071	5.7 M SF	210 K SF
Residential	83,320	170 M SF	6.3 M SF
NASHVILLE REGION			
Office	141,455	35 M SF	1.3 M SF
Industrial	168,959	59 M SF	2.2 M SF
Retail	86,744	29 M SF	1 M SF
Residential	311,420	636 M SF	23.5 M SF

Environment, Parks, and Open Space



- Legend**
- Interstate Highway
 - Major Road
 - Study Area
 - County Boundary
 - Water Body
 - Floodplain
 - Wetlands
 - Conservation Sites
 - Parcel Boundary
 - Steep Slopes

ENVIRONMENTAL FEATURES
 Tri-County Transportation and Land Use Study
 Robertson, Sumner, and Wilson Counties, Tennessee

1 inch = 9,000 feet
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 Miles

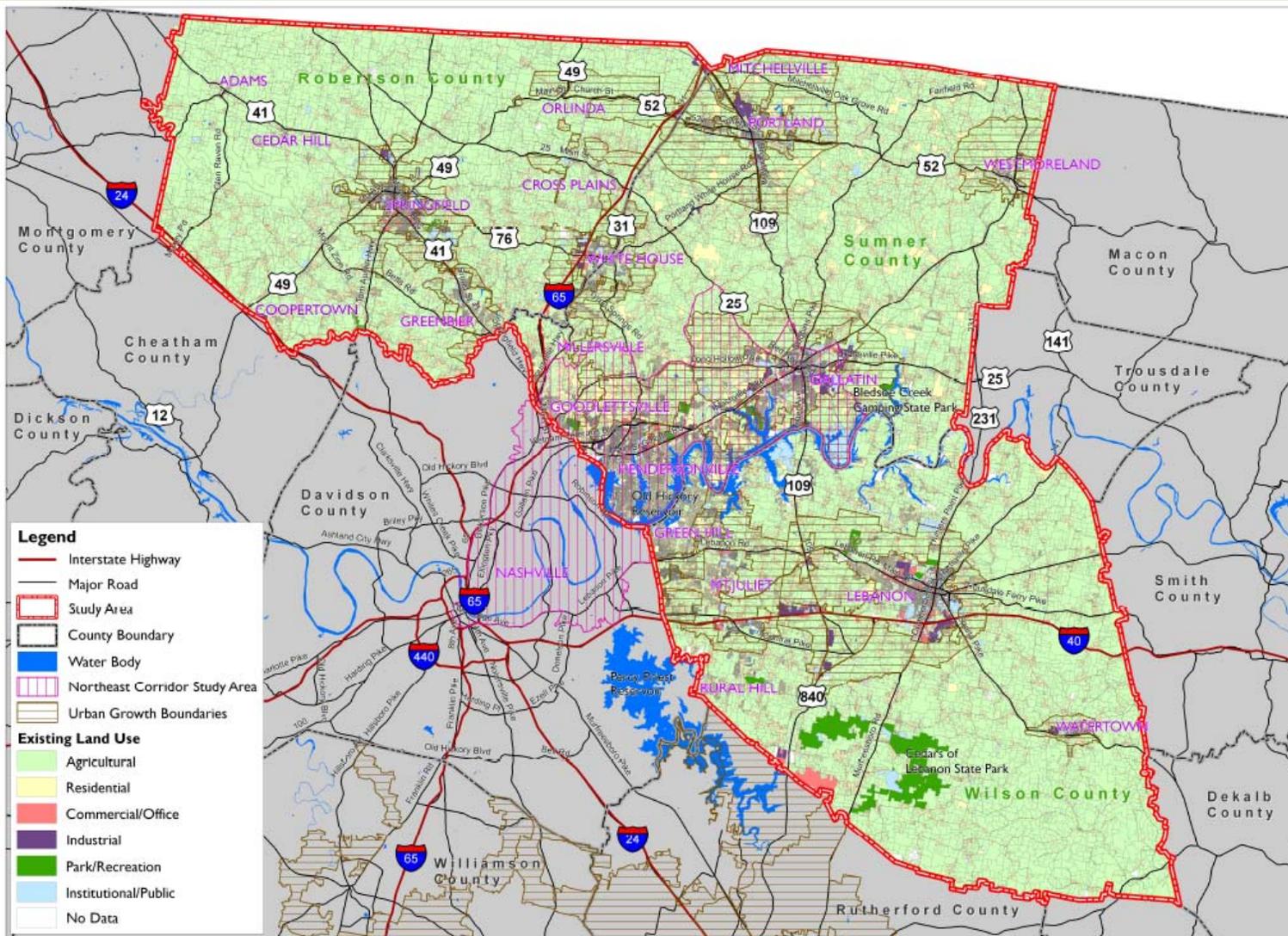
June 2008 | CD# 080703



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Existing Land Use



EXISTING LAND USE
 Tri-County Transportation and Land Use Study
 Robertson, Sumner, and Wilson Counties, Tennessee

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June 2008 | ULR # 07201

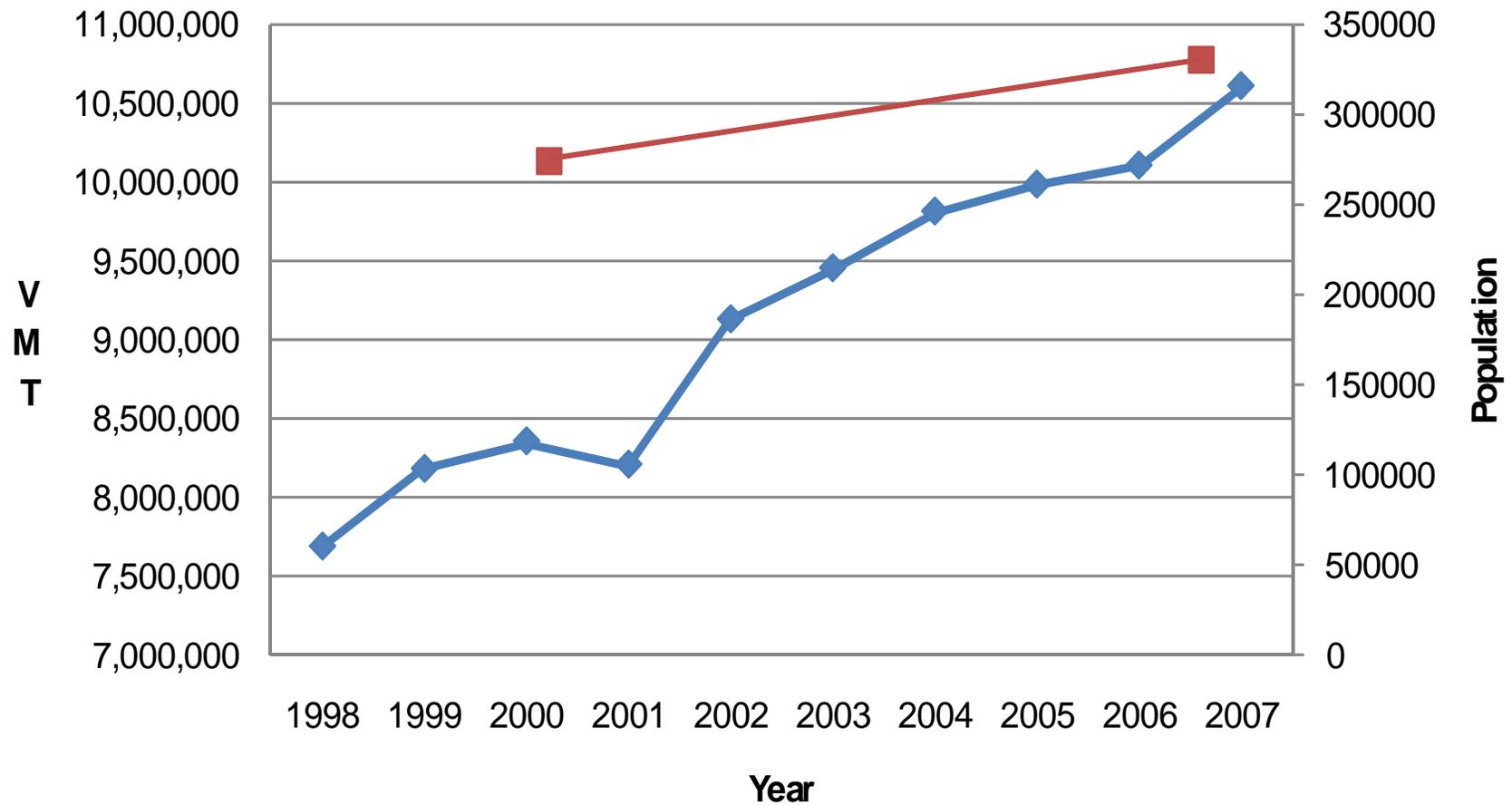


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Transportation Trends

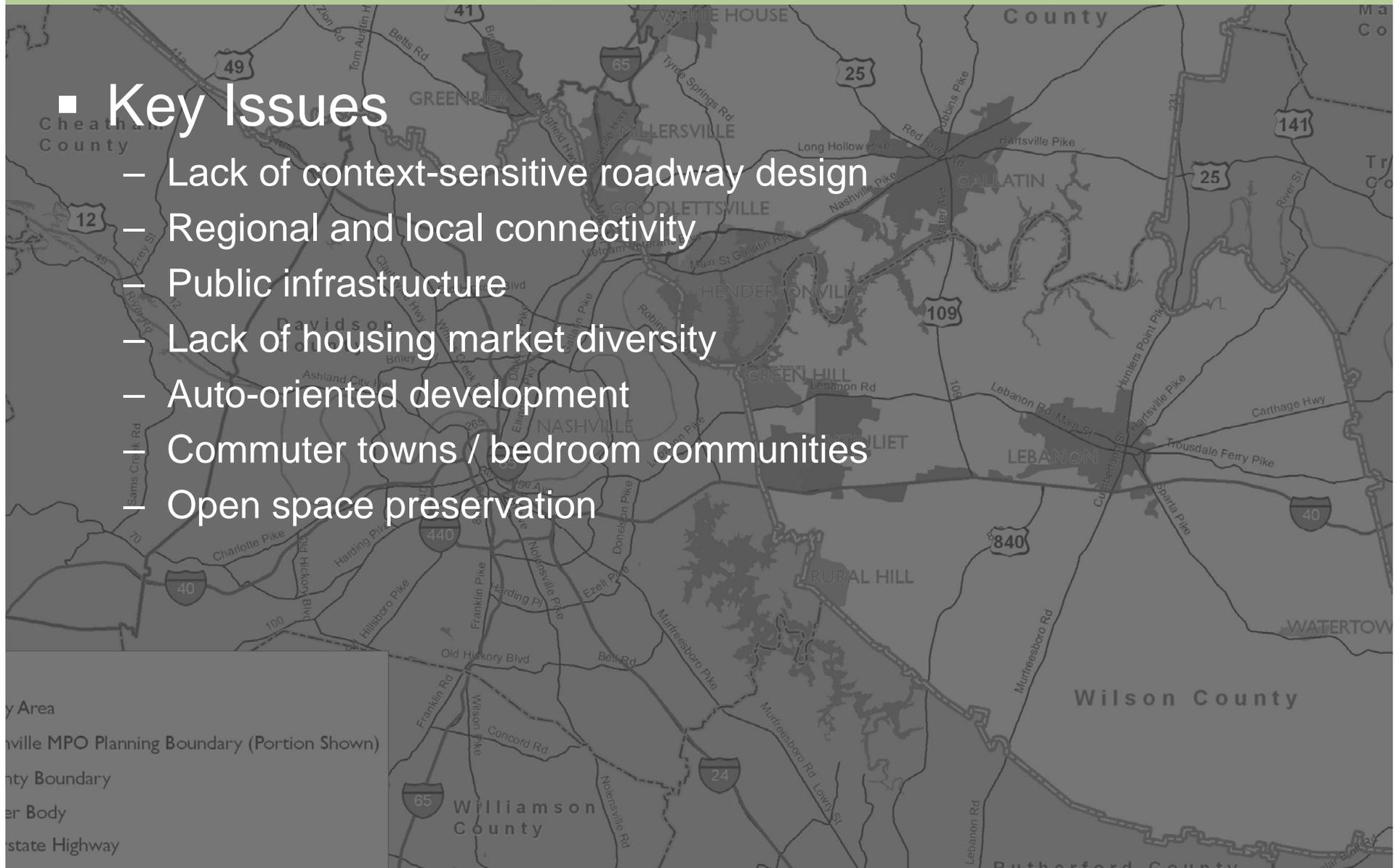
Tri-County Annual VMT Trend



Consultant Team Overview of Initial Observations

■ Key Issues

- Lack of context-sensitive roadway design
- Regional and local connectivity
- Public infrastructure
- Lack of housing market diversity
- Auto-oriented development
- Commuter towns / bedroom communities
- Open space preservation



A grayscale map of the Nashville, Tennessee metropolitan area and surrounding regions. The map shows major highways, including Interstates 40, 65, 75, and 25, as well as various state routes. Labeled areas include Cheatham County, Davidson County, Wilson County, and parts of Macon, Trousdale, and Moore counties. Specific cities and towns shown are White House, Greenbrier, Millersville, Goodlettsville, Hendersonville, Nashville, Mt Juliet, Gallatin, Lebanon, and Rural Hill. The text "Business-as-Usual (BAU)" is overlaid in large white font in the center of the map. The map is framed by a light green border at the top and bottom.

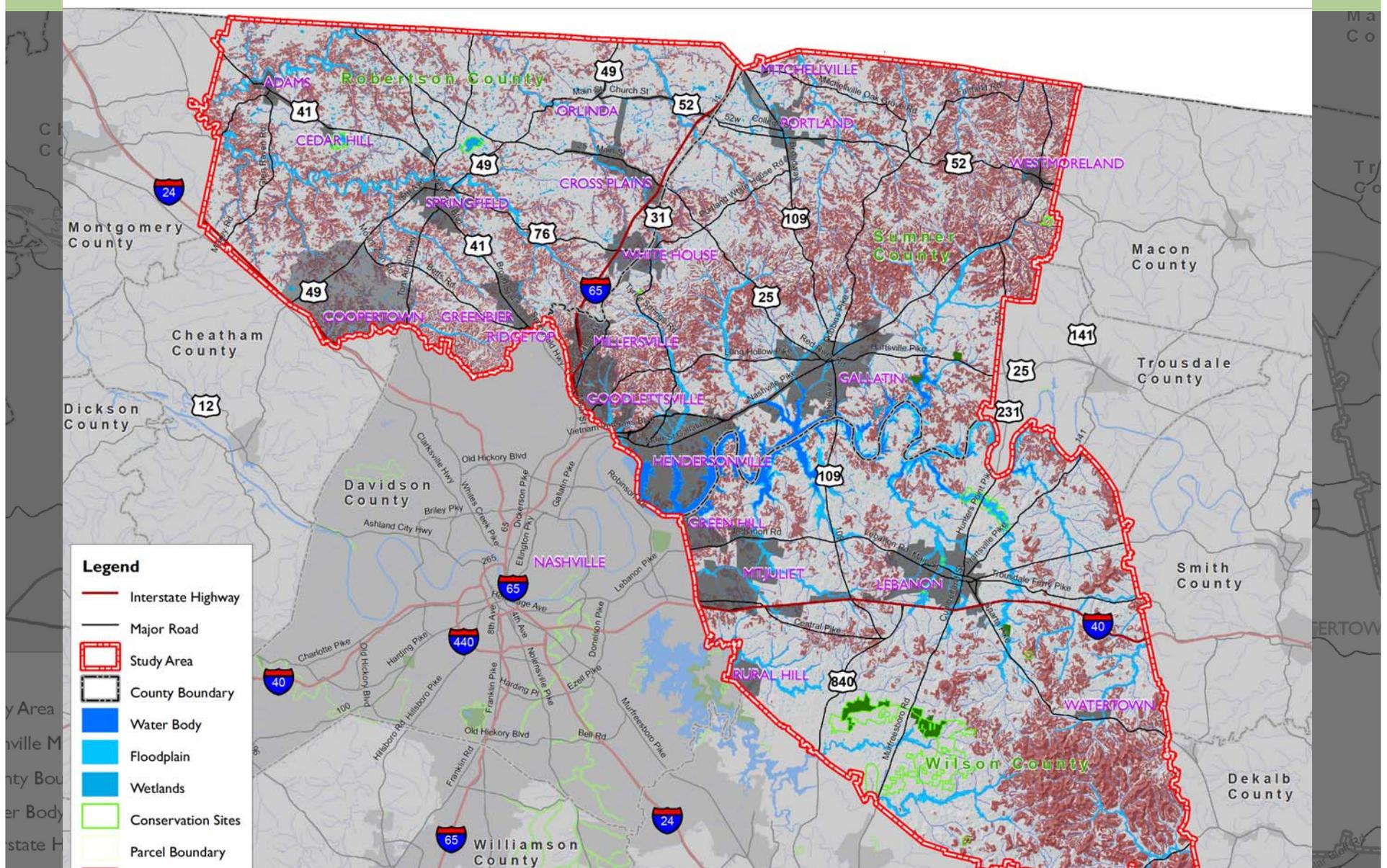
Business-as-Usual (BAU)

What makes up business-as-usual?

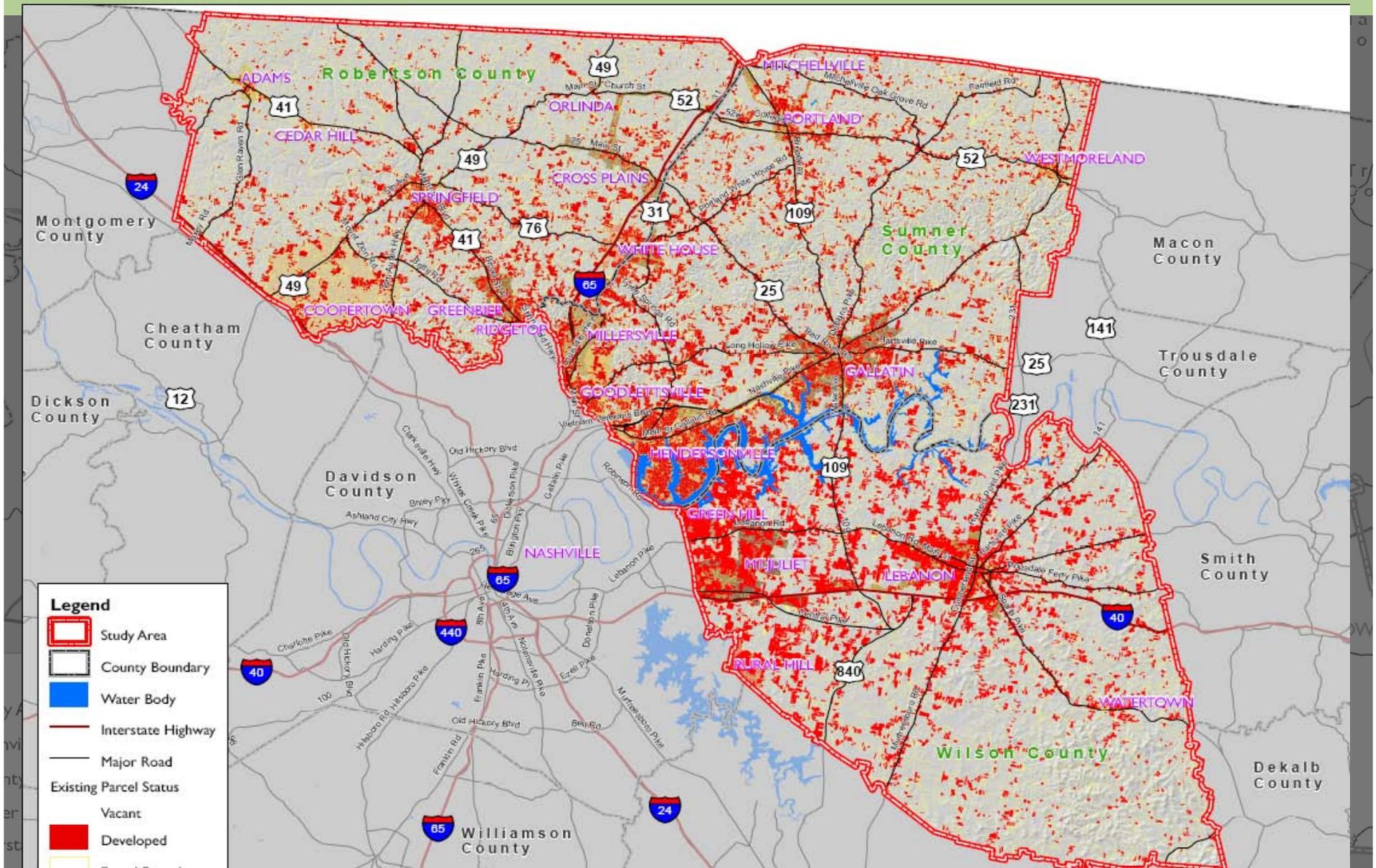
**SUPPLY,
SUITABILITY,
DEMAND**



Supply - Environmental Features

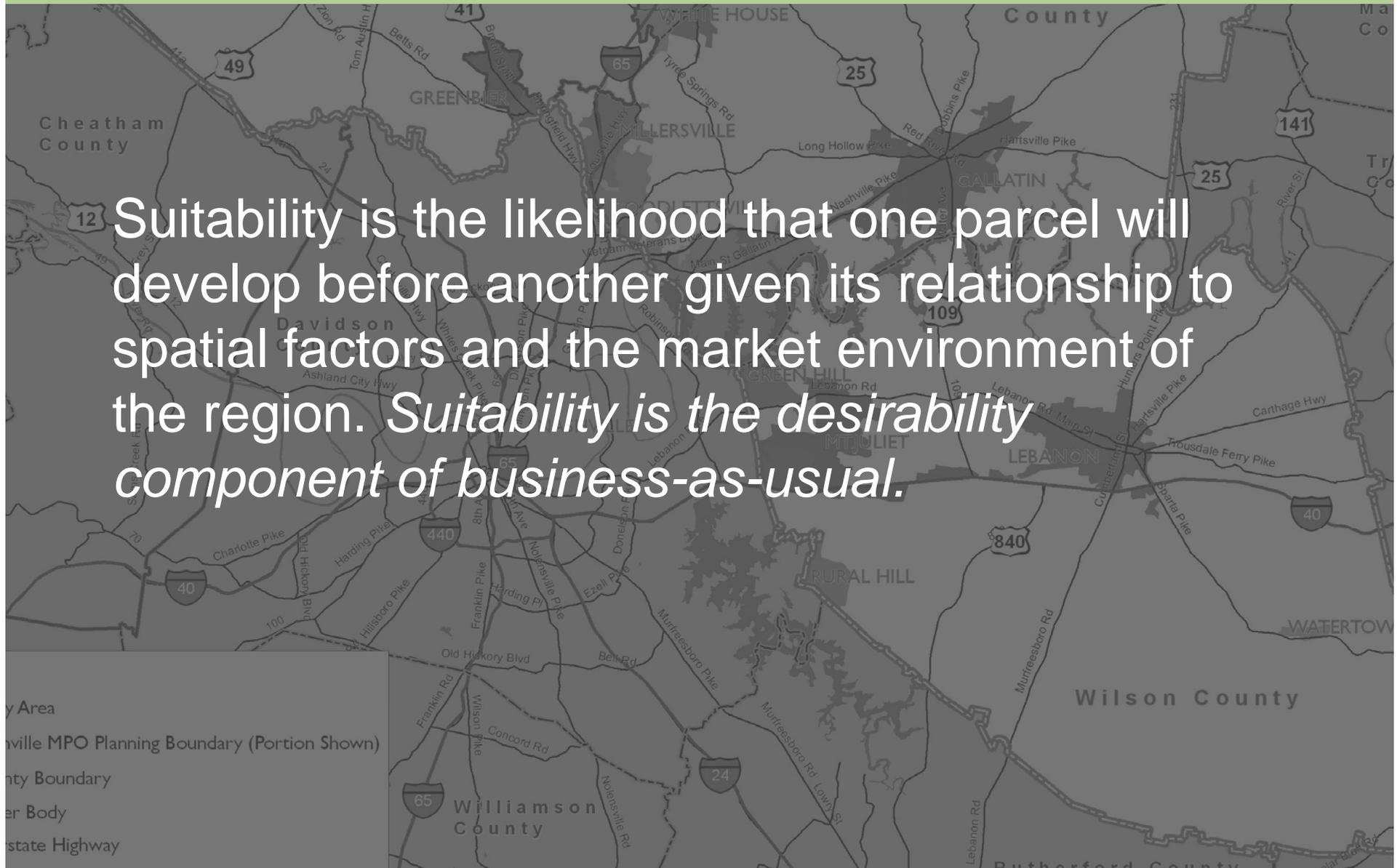


Supply - Existing Development



Suitability

Suitability is the likelihood that one parcel will develop before another given its relationship to spatial factors and the market environment of the region. *Suitability is the desirability component of business-as-usual.*

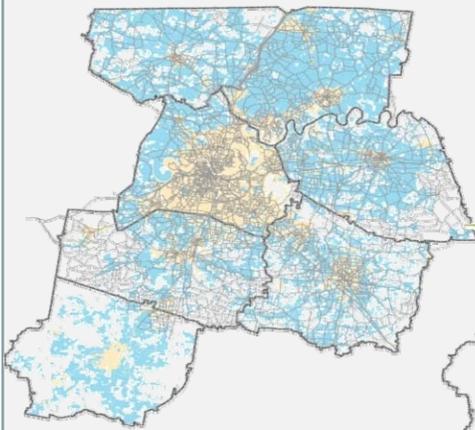


Suitability Factors

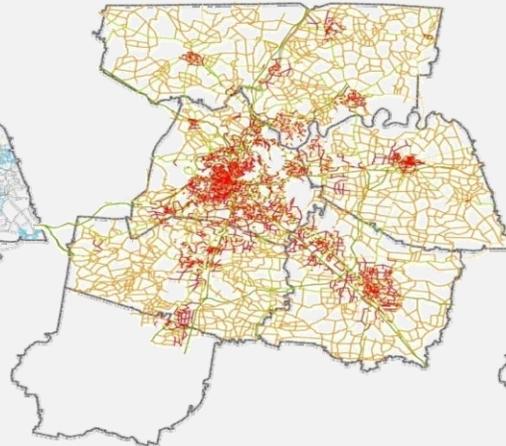
Suitability Factors considered include:

- Access to water & sewer infrastructure
- Proximity to network roads
- Proximity to major intersections and interchanges
- Proximity to hospitals
- Proximity to parks
- Proximity to existing retail locations
- Congestion levels on immediate roadway network
- Presence of slopes and environmental challenges
- Proximity to transit stops
- Location within bus service areas

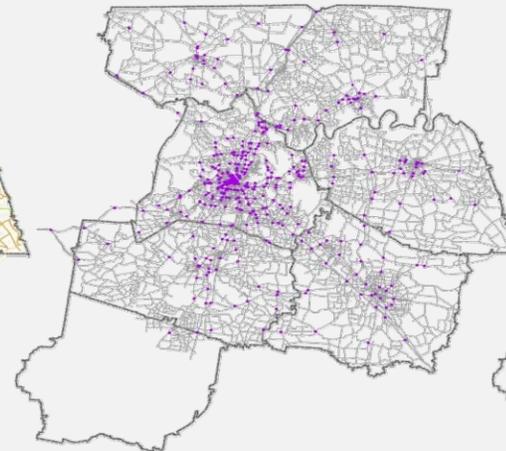
Suitability Factors Illustrated



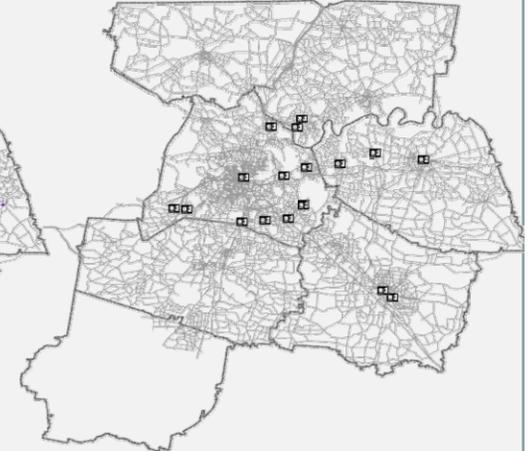
Water and Sewer Service Areas



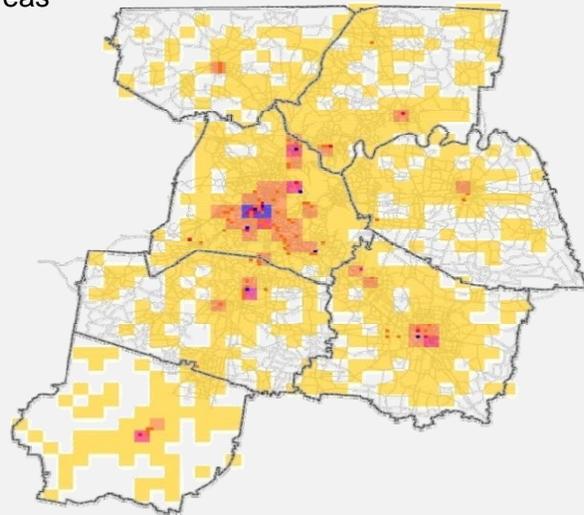
Network Road Speeds



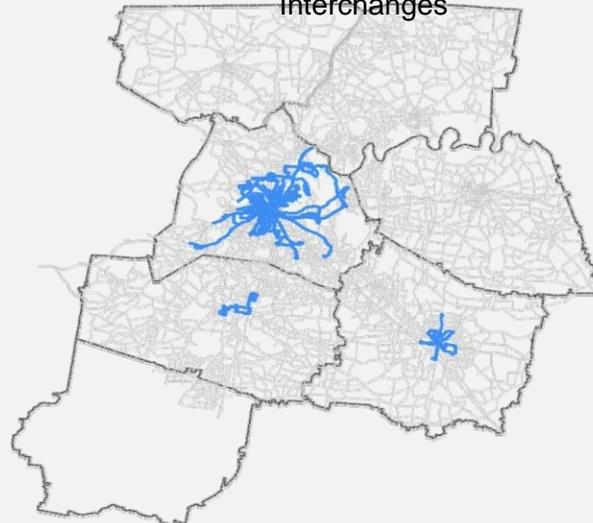
Major Intersections & Interchanges



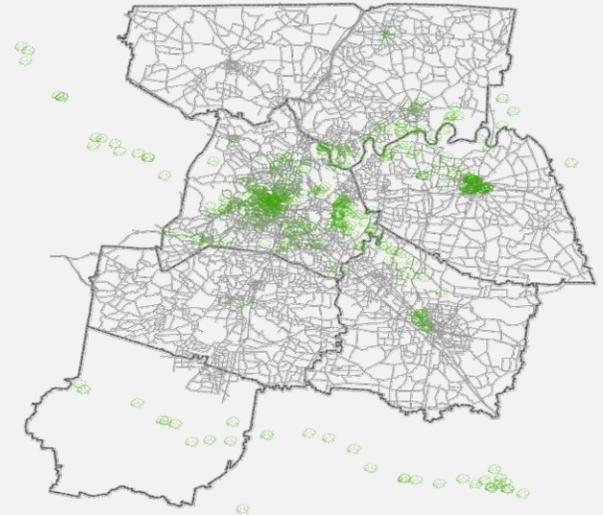
Transit Stations



Retail Density Grids



Bus Routes



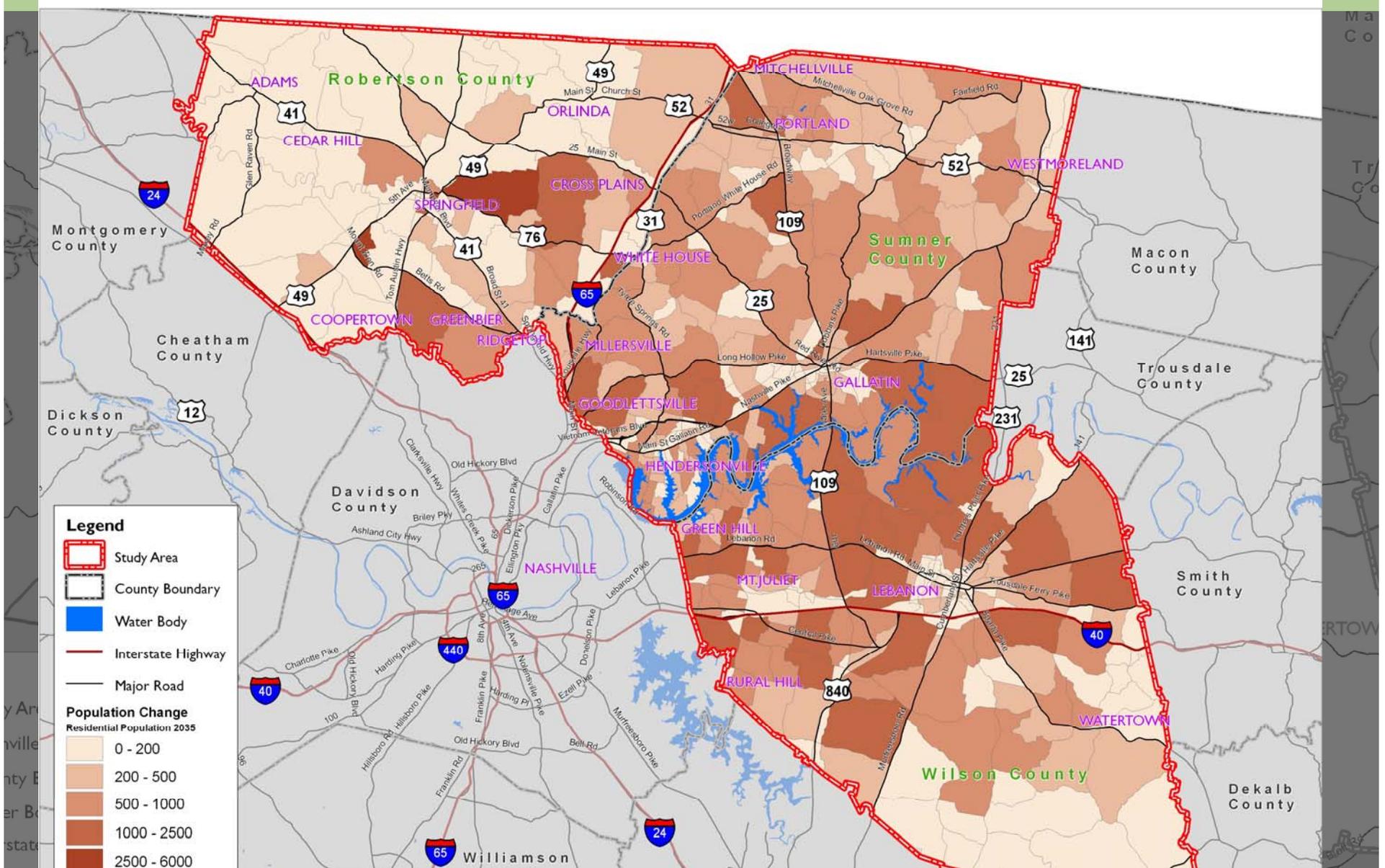
Parks and Recreation Areas

Demand - Household Growth Forecast

County	2008	2020	2035	% Annual Growth
Robertson	24,510	30,780	38,231	1.66%
Sumner	60,860	77,680	98,194	1.79%
Wilson	42,170	56,670	74,435	2.13%
Total	127,540	165,130	210,860	1.88%

Source: Woods & Poole and BBPC Report, 2008

Population Change – by TAZ



Demand - Industrial Employment Growth Forecast

County	2008	2020	2035	% Annual Growth
Robertson	13,540	16,430	19,885	1.43%
Sumner	21,680	27,100	34,088	1.69%
Wilson	21,630	27,780	35,167	1.82%
Total	56,850	71,310	89,140	1.68%

Source: Woods & Poole and BBPC Report, 2008

Demand - Retail Employment Growth Forecast

County	2008	2020	2035	% Annual
Robertson	4,430	5,730	7,265	1.85%
Sumner	8,910	10,990	13,672	1.60%
Wilson	10,350	27,780	19,825	2.44%
Total	23,690	31,310	40,761	2.03%

Source: Woods & Poole and BBPC Report, 2008

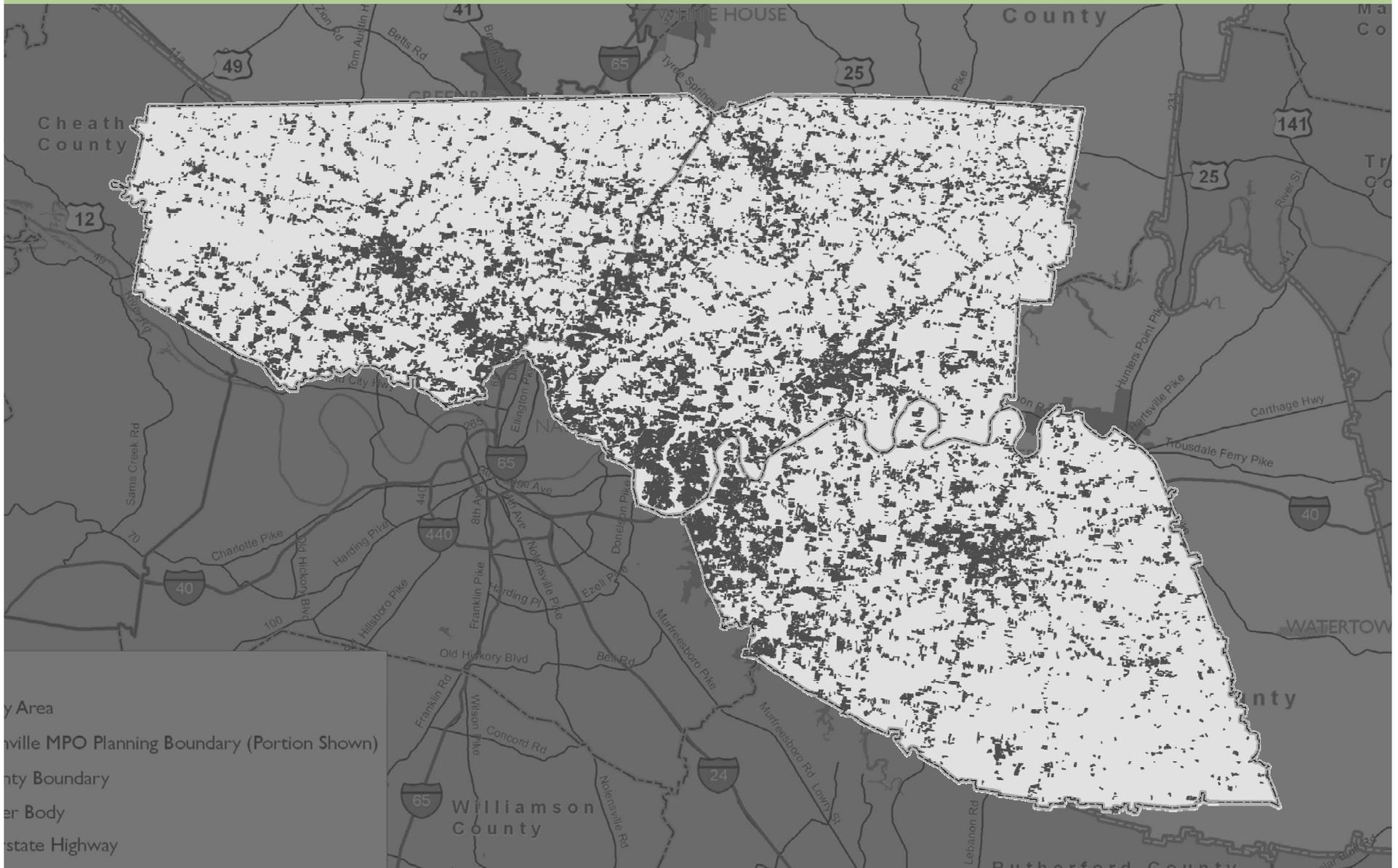
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Demand - Office Employment Growth Forecast

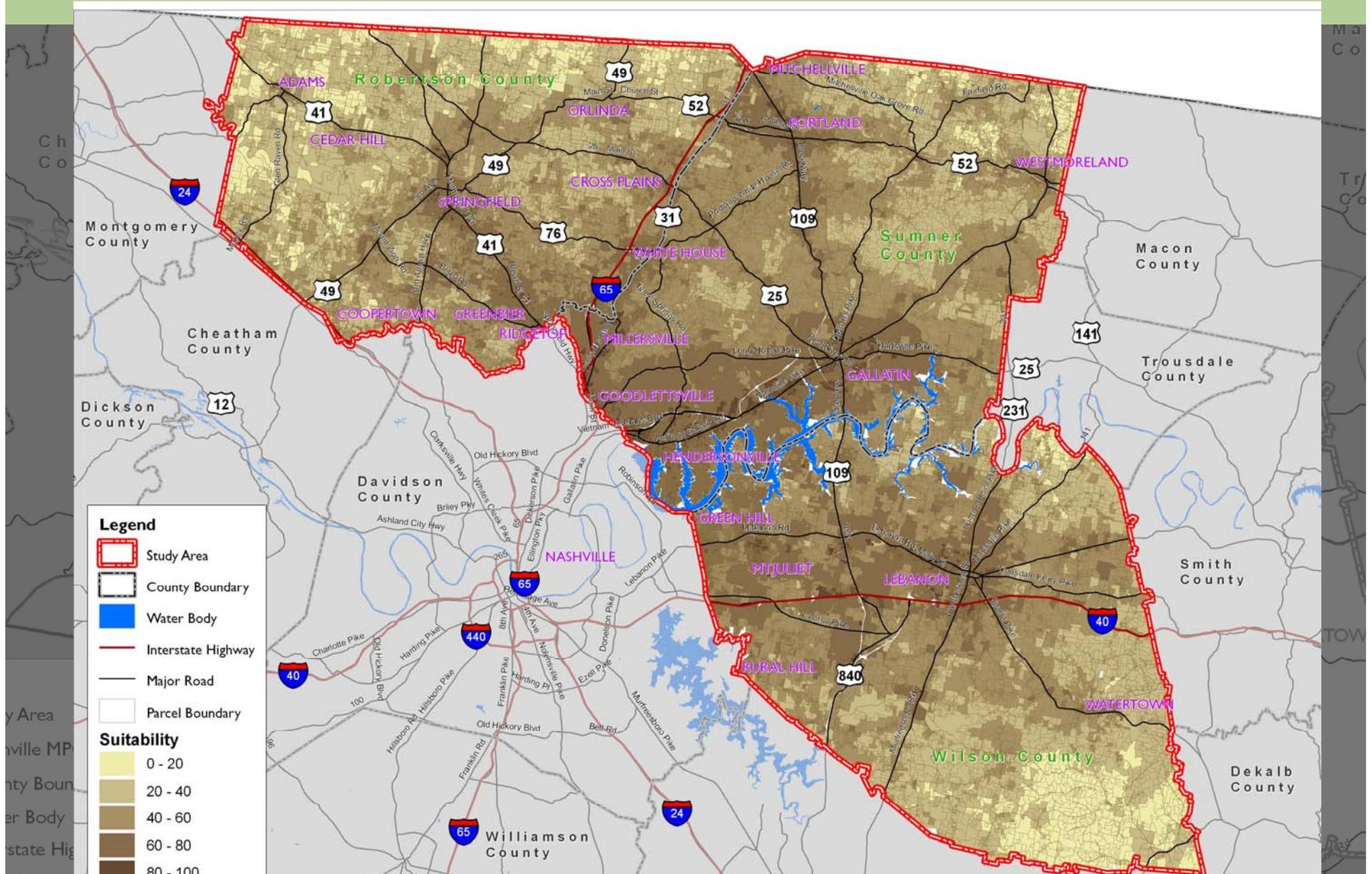
County	2008	2020	2035	% Annual Growth
Robertson	4,030	5,320	6,779	1.94%
Sumner	10,280	13,030	16,625	1.80%
Wilson	9,250	13,020	17,375	2.36%
Total	23,560	31,370	40,779	2.05%

Source: Woods & Poole and BBPC Report, 2008

Tri County Existing Development Map



TriCounty Suitability Map



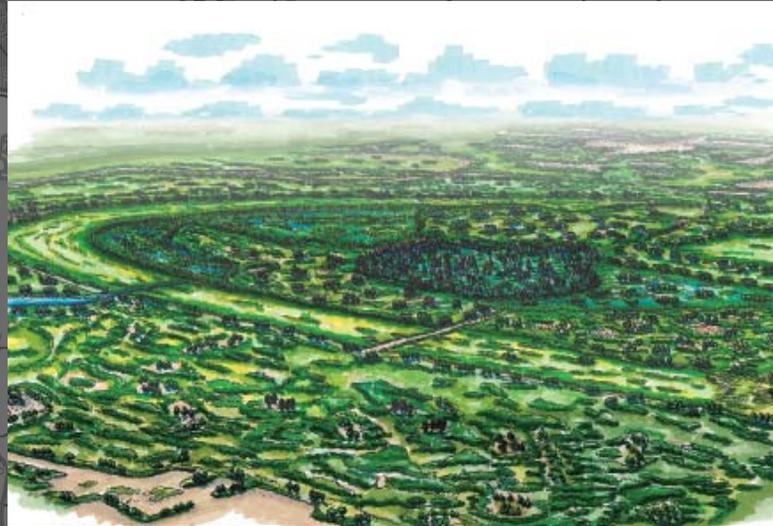
Character Types

- Categories of various development patterns prevalent
- Recognizable development patterns expected to occur across the landscape
 - Observations during site visits
 - Local regulatory tools and policy documents
- Scale from rural to urban, with residential densities and non-residential intensities ranging from least to highest
- Categories assigned to BAU Scenario to summarize trend if existing pattern of growth is continued to 2035

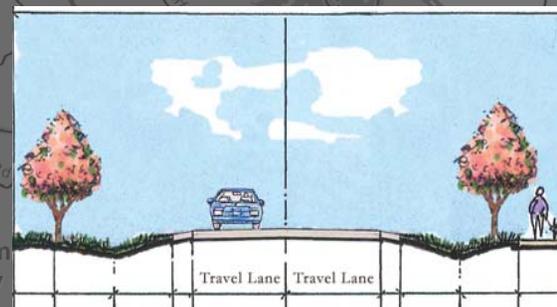
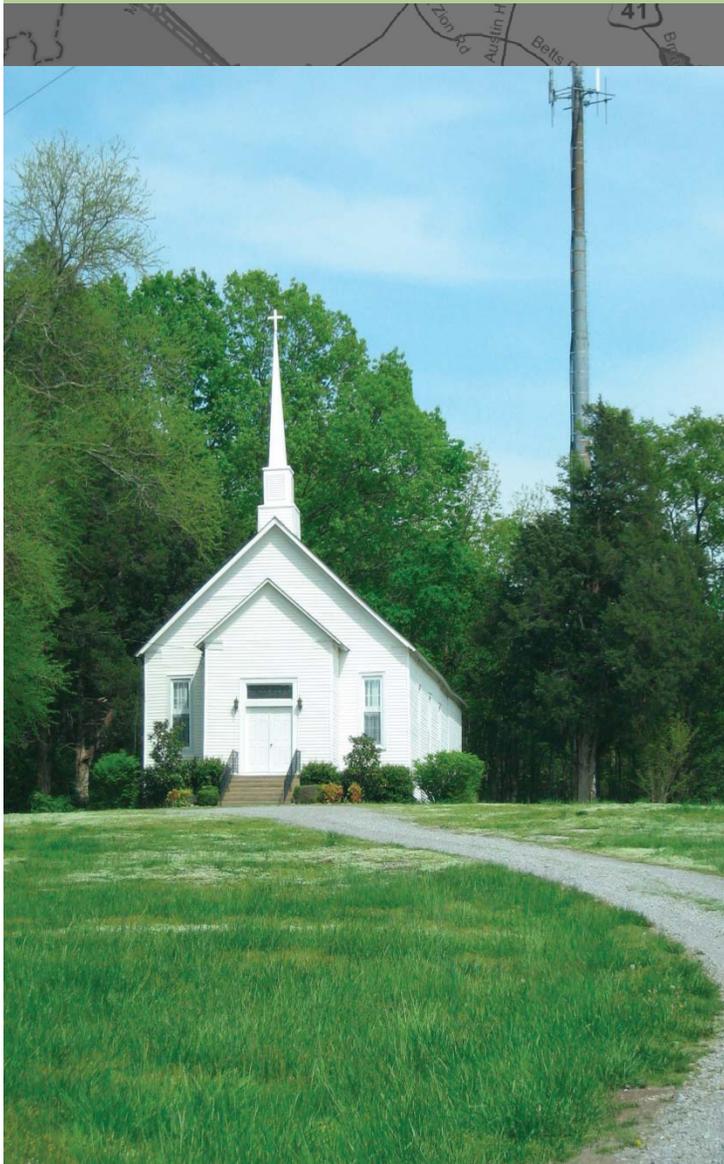
y Area
Nashville MPO Planning Boundary (Portion Shown)
County Boundary
Water Body
State Highway

Character Types – Environmentally Sensitive

- Areas recognized for preservation of environmentally sensitive areas
- Includes state parks & large dedicated open spaces



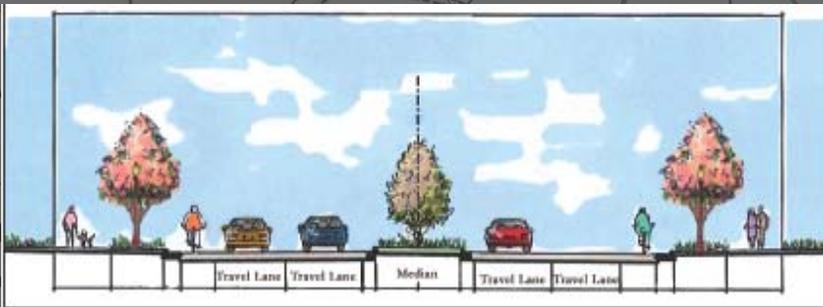
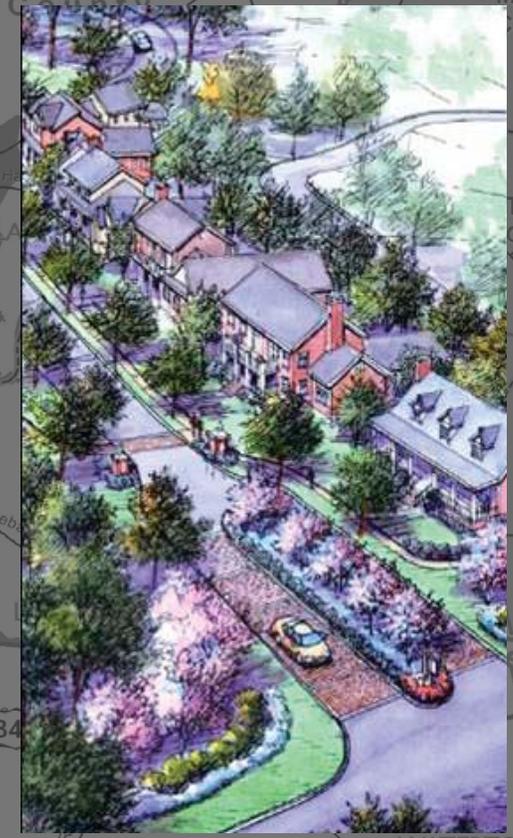
Character Types - Rural



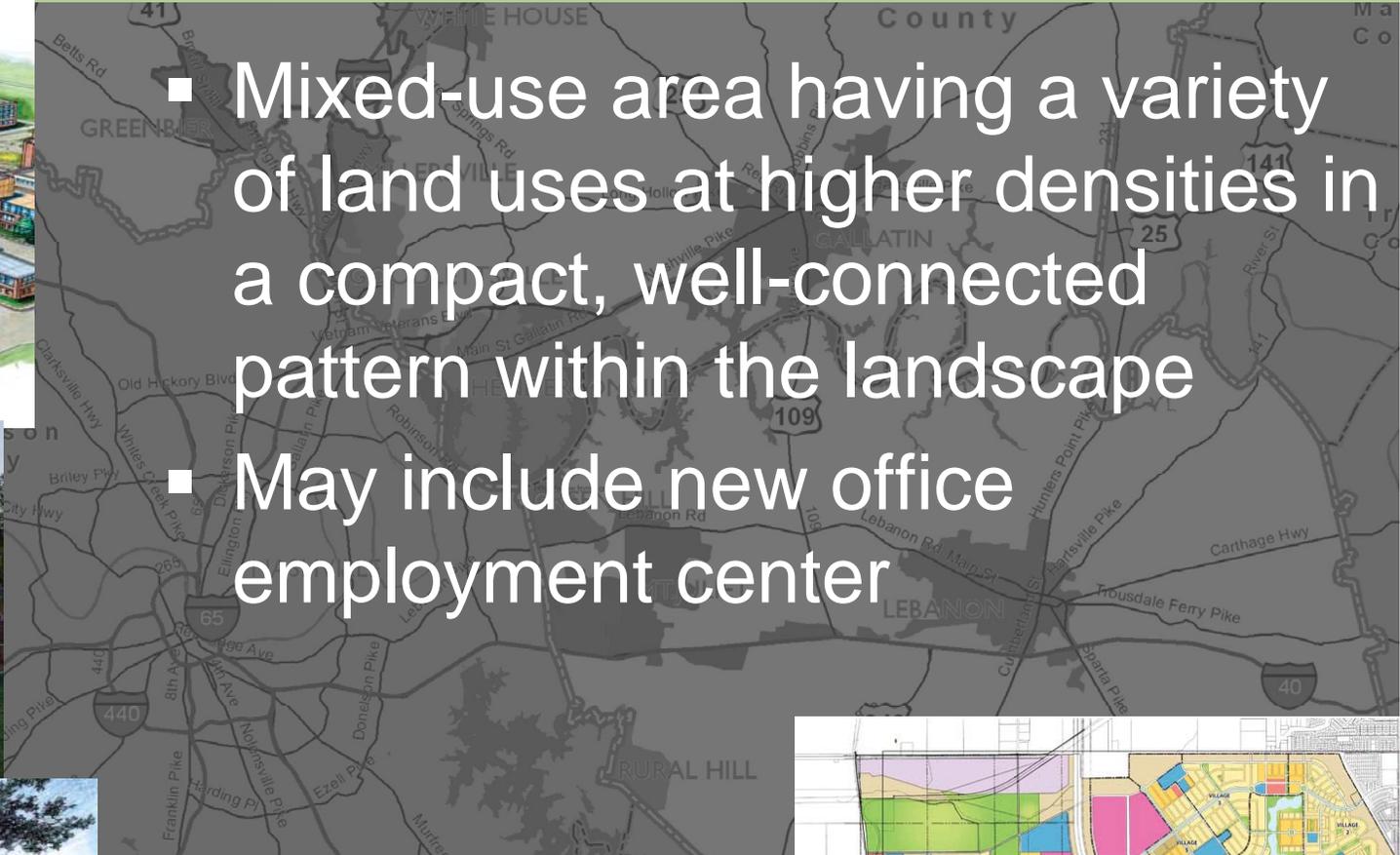
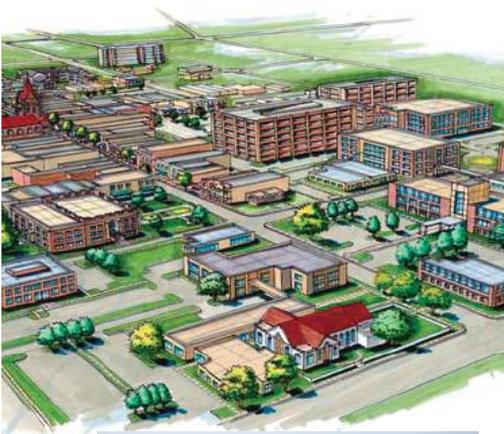
- Areas recognized as those having significant value for continued agricultural purpose and rural way of life in the future

Character Types - Suburban

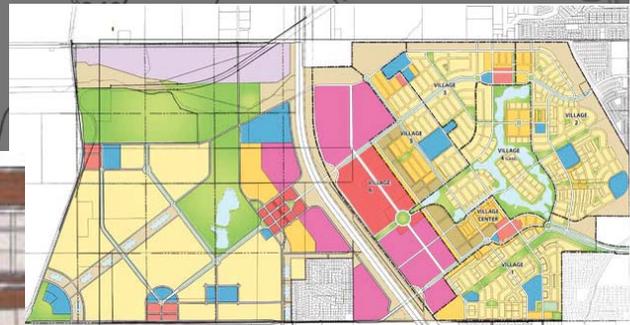
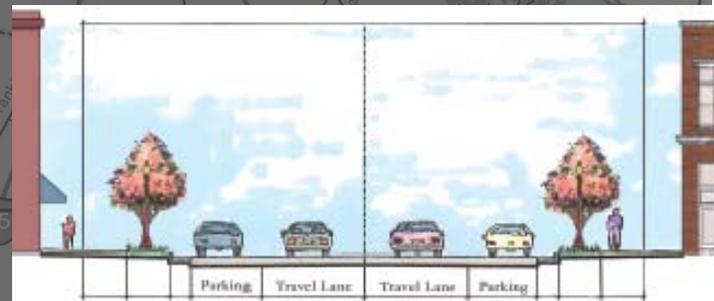
- Areas where a variety of land uses occur at low densities, generally separated across the landscape by specific use type
- Automobile-oriented, includes highway commercial areas found along major roadway corridors



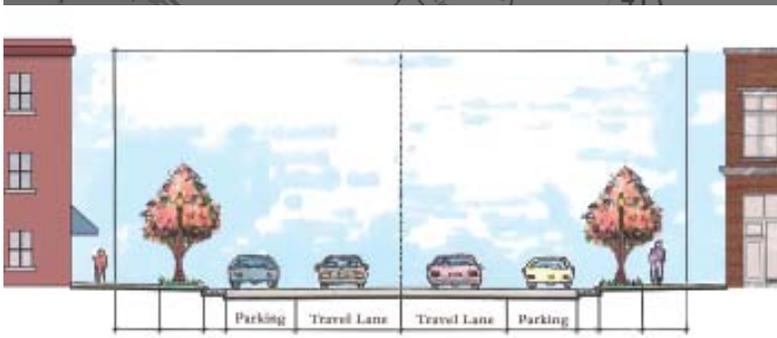
Character Types – Mixed-use Villages



- Mixed-use area having a variety of land uses at higher densities in a compact, well-connected pattern within the landscape
- May include new office employment center



Character Types – Traditional Town Center

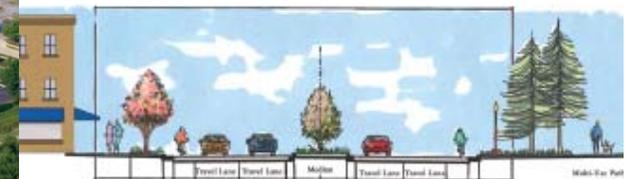


- Areas with a variety of land uses, typically at the highest densities in region
- Generally found in historic established core areas
- Pedestrian oriented, due to these areas being planned prior to euclidean zoning (separates land uses) and automobile dominance in the landscape (typically pre-1940s)



Character Types – Industrial Employment Center

- Areas designed for major employment uses serving a specific or unique purpose such as an industrial park
- Generally separated across the landscape from other uses



Character Type – Proposed New



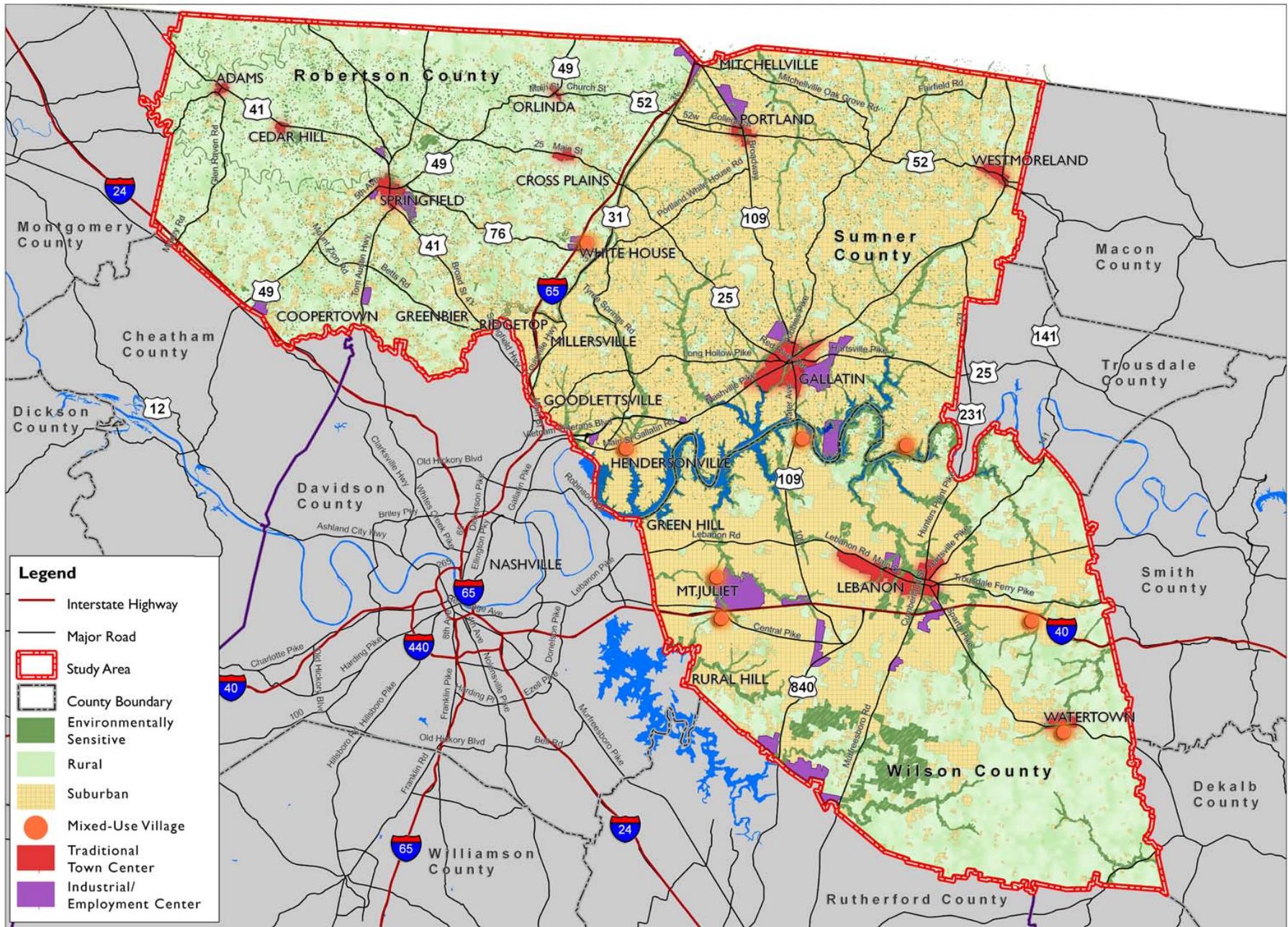
- Transit-Oriented Development
- District supporting a mix of land uses, at higher densities, located in close proximity to an existing or planned mass transit station

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state Highway

Williamson County

Wilson County

Rutherford County



CHARACTER AREA MAP
 Tri-County Transportation and Land Use Study
 Robertson, Sumner, and Wilson Counties, Tennessee



1 inch equals 9,000 feet



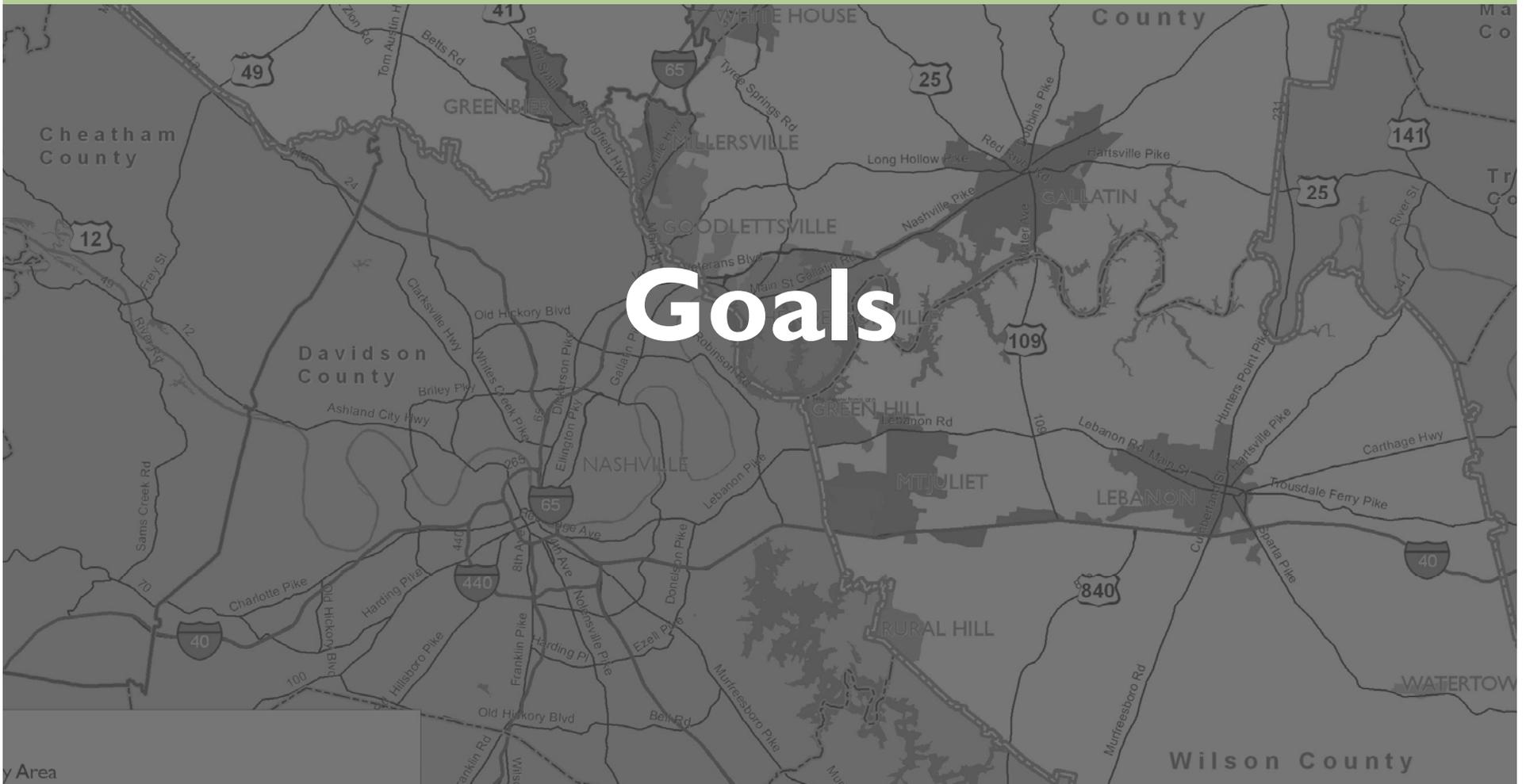
June 2008 | LCU# 1007281



Source:
 The data for this study was obtained from the public domain of the Tennessee State Planning Office. The data was not verified by the study team. The study team is not responsible for any errors or omissions in the data. The study team is not responsible for any errors or omissions in the data.

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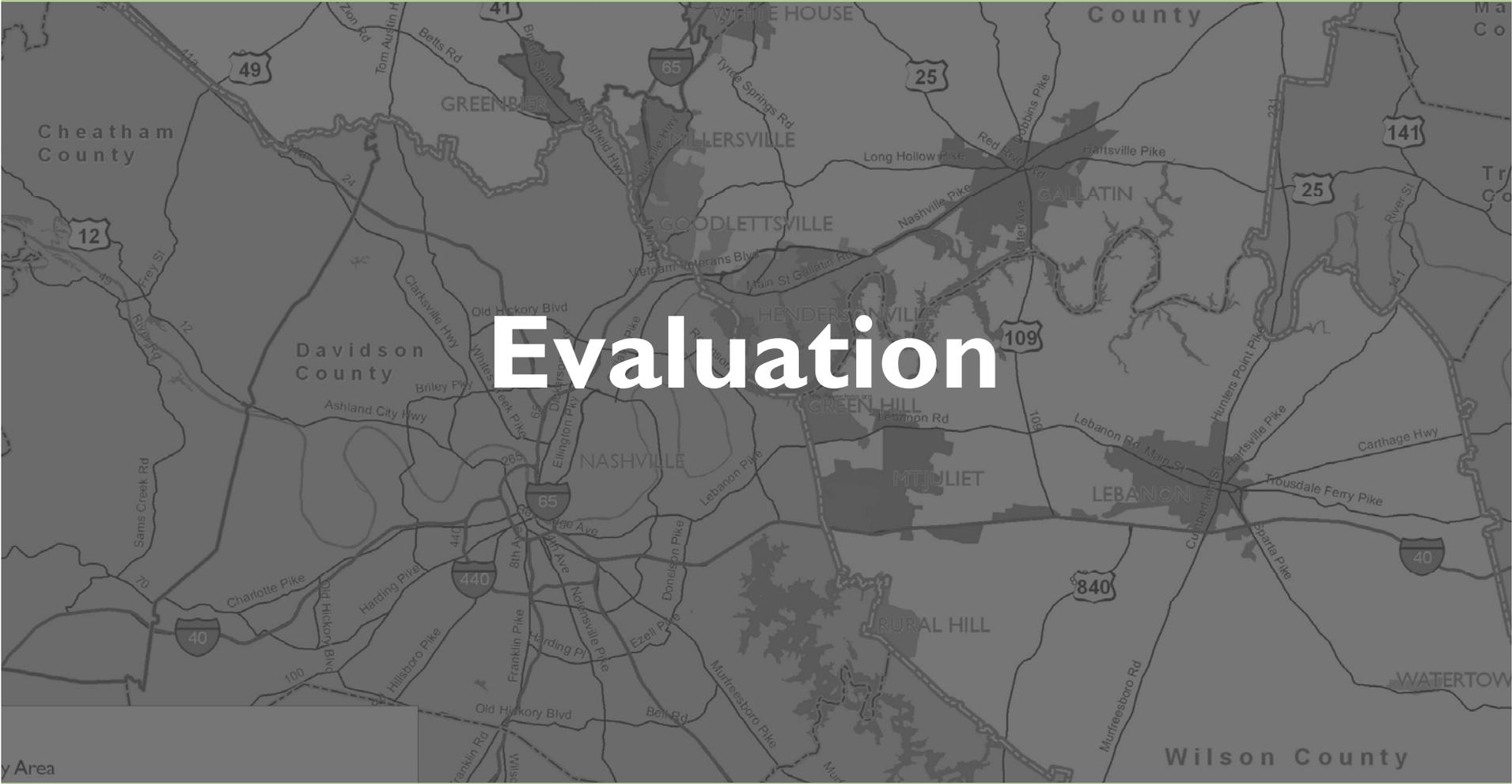
Goals



Overview of Common Local Goals

- **Historic Conservation and Enhancement**
- **Viable Agriculture**
- **Rural Preservation**
- **Economic Enrichment while Safeguarding Existing Public and Private Development**
- **Preserve Urban Centers**
- **Protection of Natural Resources**
- **Efficient Transportation System**
- **Ensure Availability of Services**
- **Provide Housing Options**
- **Maintain Sense of Community and Sense of Place**

Evaluation



Group Exercise – Report Card on BAU

Goals	Grade
Historic Conservation and Enhancement	
Viable Agriculture	
Rural Preservation	
Economic Enrichment while Safeguarding Existing Public and Private Development	
Preserve Urban Centers	
Protection of Natural Resources	
Efficient Transportation System	
Ensure Availability of Services	
Provide Housing Options	
Maintain Sense of Community and Sense of Place	

Upcoming Session

Round 2: The Importance of Quality Growth

October 6 - Hendersonville High School @ 6 PM

October 7 – *Springfield City Hall @ 5 PM*

October 9 – Cumberland University @ 5:30 PM

Participants will learn about choices available for the future of the study area.

Provide input toward alternative ways to grow in the future based upon quality issues defined and choices available.