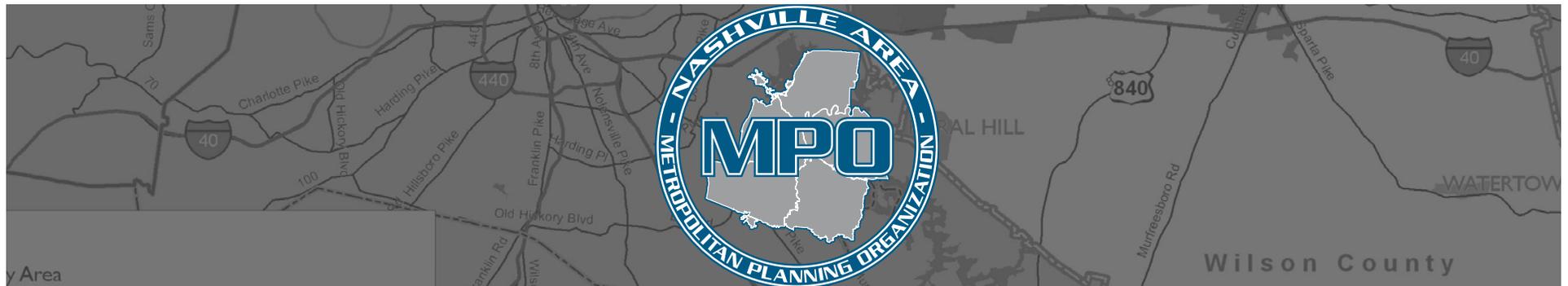




Nashville Area Metropolitan Planning Organization Tri-County Transportation & Land Use Study of Robertson, Sumner, Wilson Counties

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



The Project Team

Nashville Area Metropolitan Planning Organization

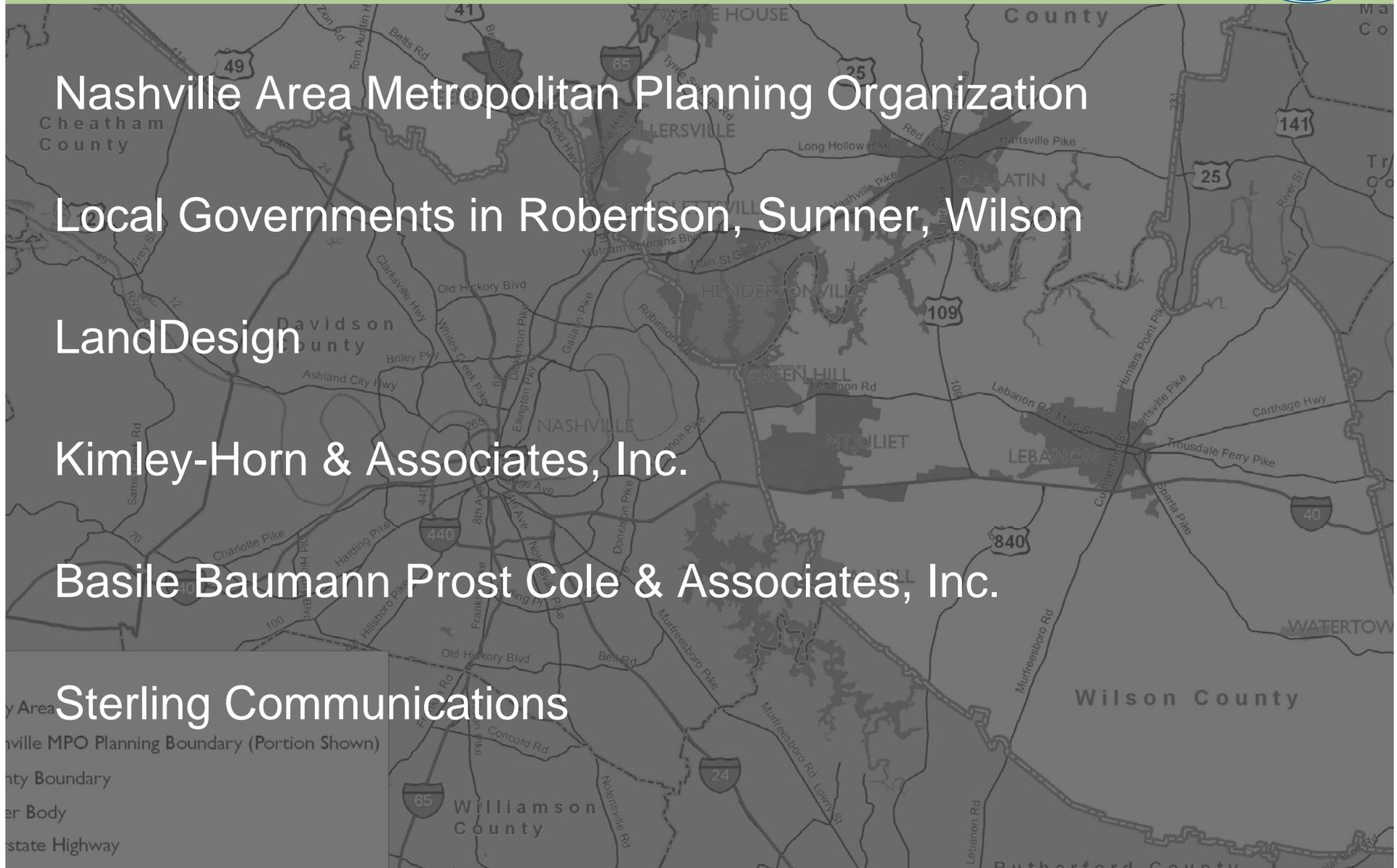
Local Governments in Robertson, Sumner, Wilson

LandDesign

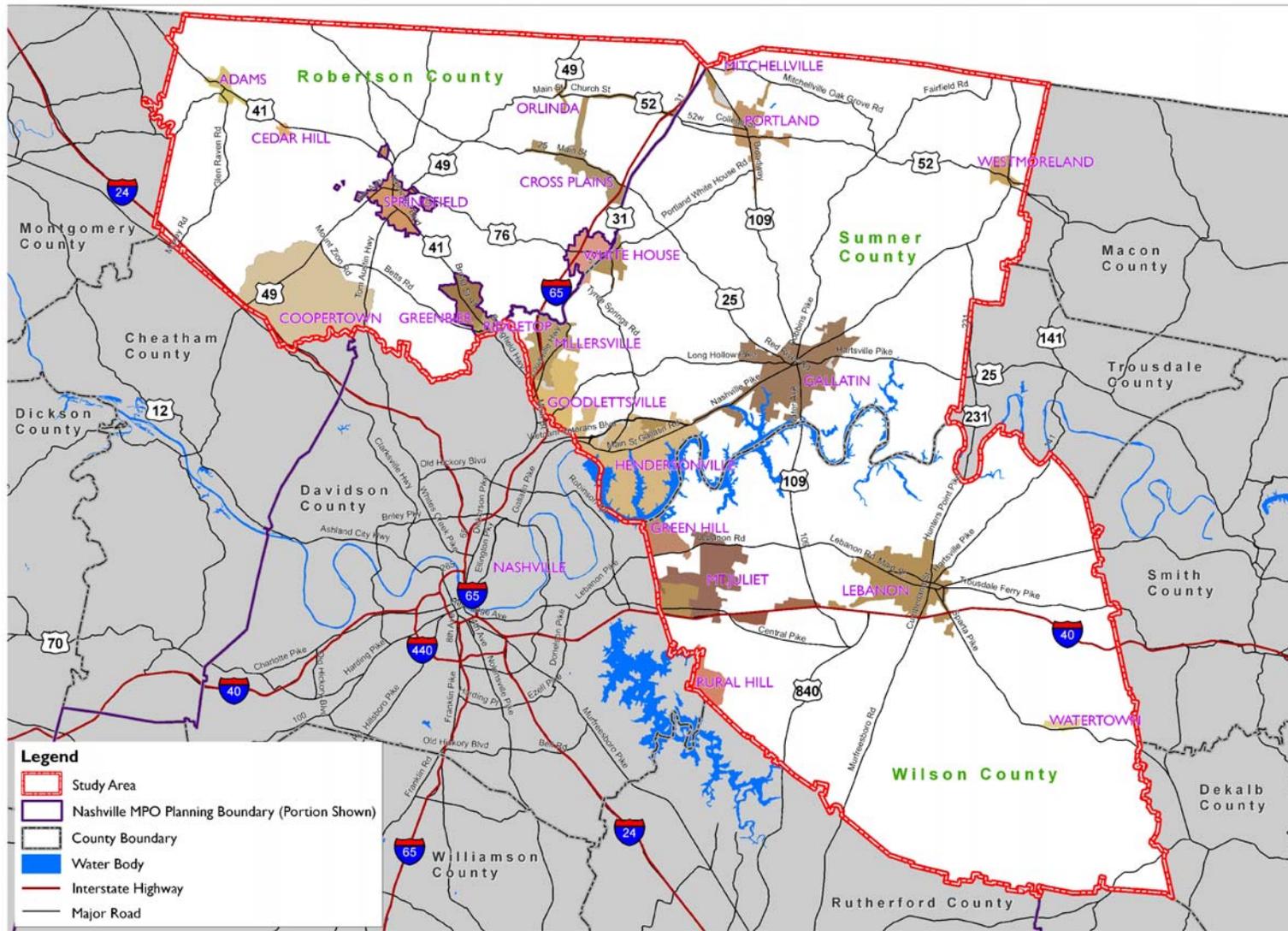
Kimley-Horn & Associates, Inc.

Basile Baumann Prost Cole & Associates, Inc.

Sterling Communications



Study Area Context

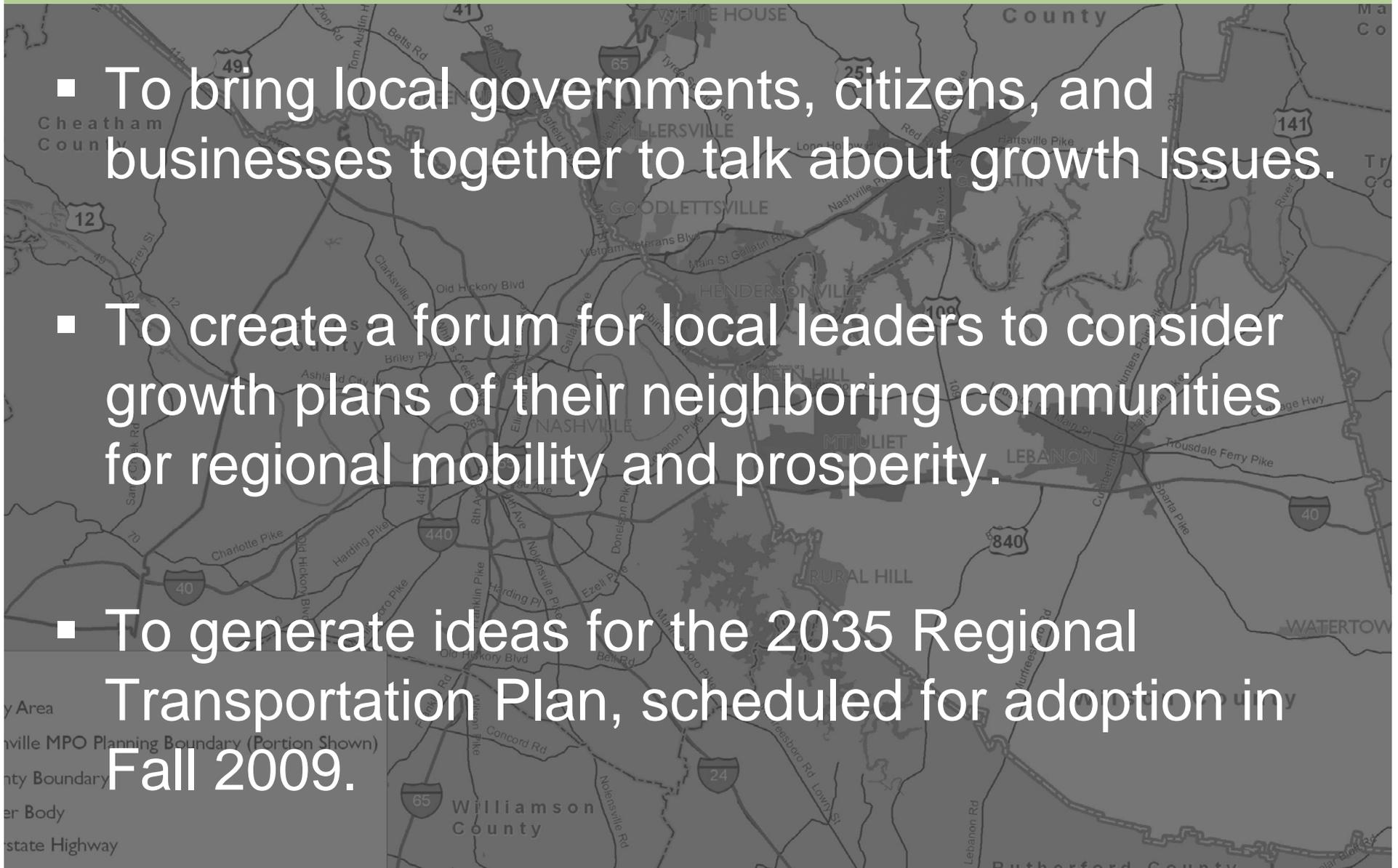


CONTEXT MAP
Tri-County Transportation and Land Use Study
Robertson, Sumner, and Wilson Counties, Tennessee

1 inch equals 9,000 feet
0 1 2 4 Miles
JUNE 2008 | 104 x 102003
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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.



Agenda



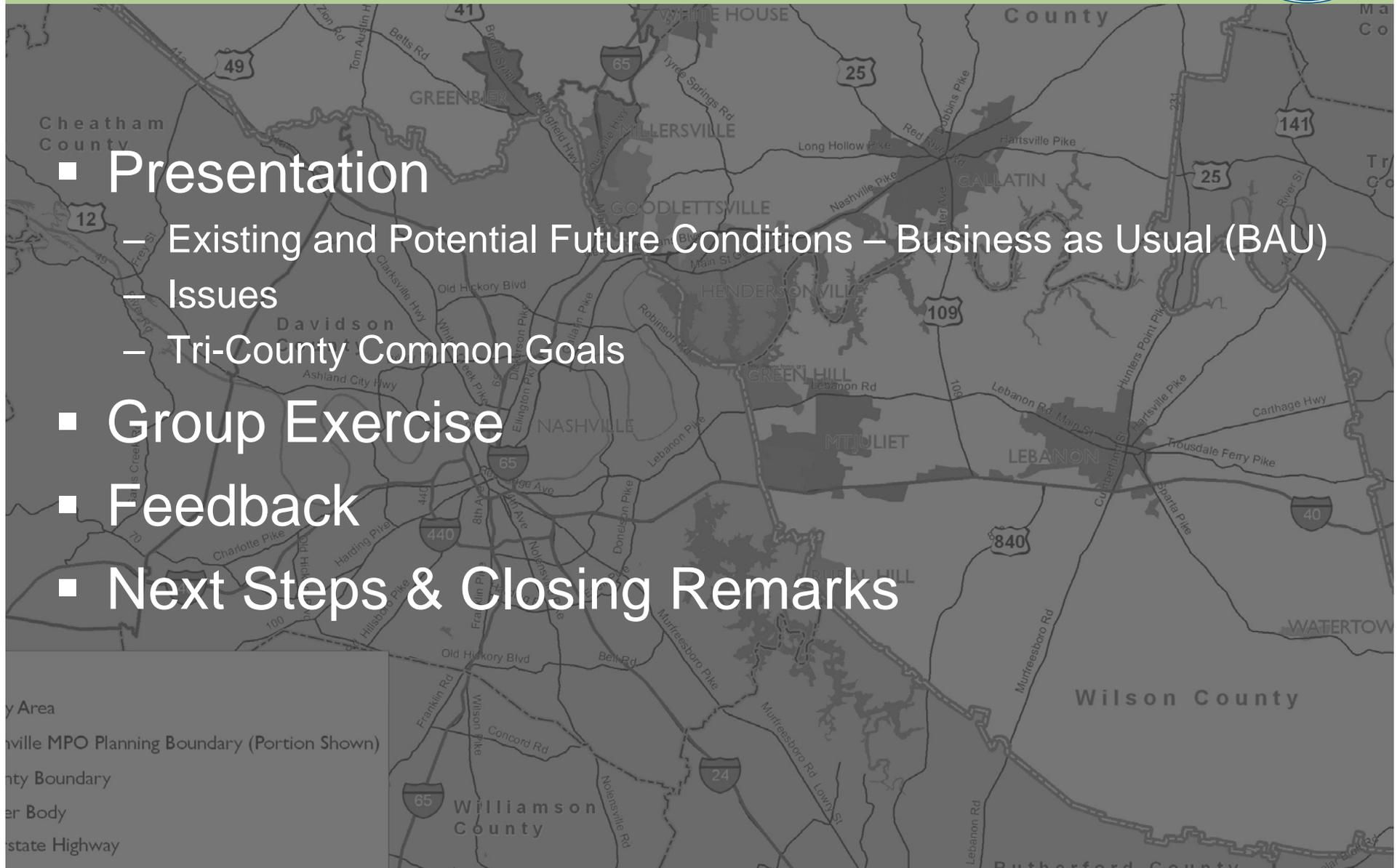
- Presentation

- Existing and Potential Future Conditions – Business as Usual (BAU)
- Issues
- Tri-County Common Goals

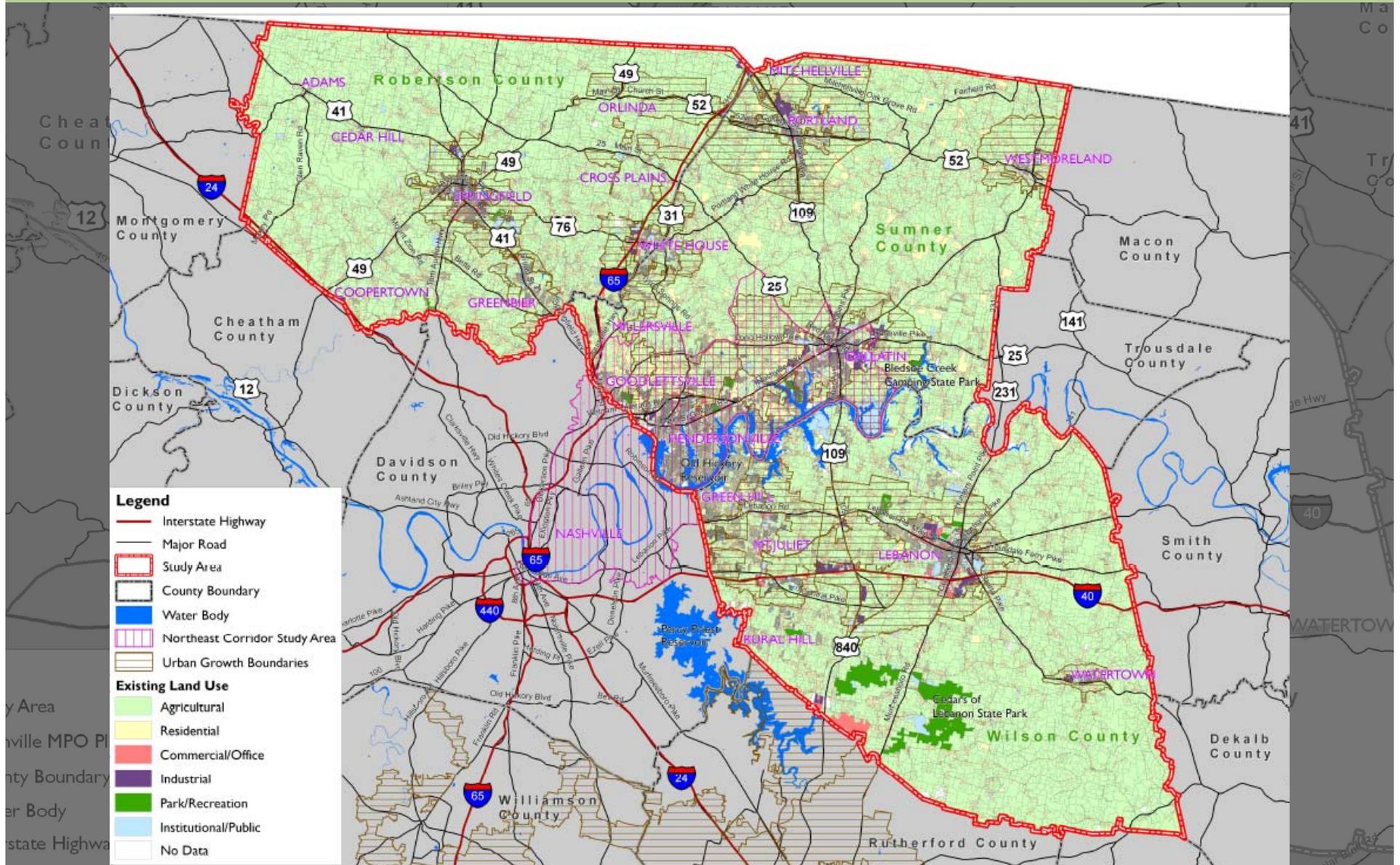
- Group Exercise

- Feedback

- Next Steps & Closing Remarks



Existing Land Use



Economic & Market Analysis

Preliminary Findings

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



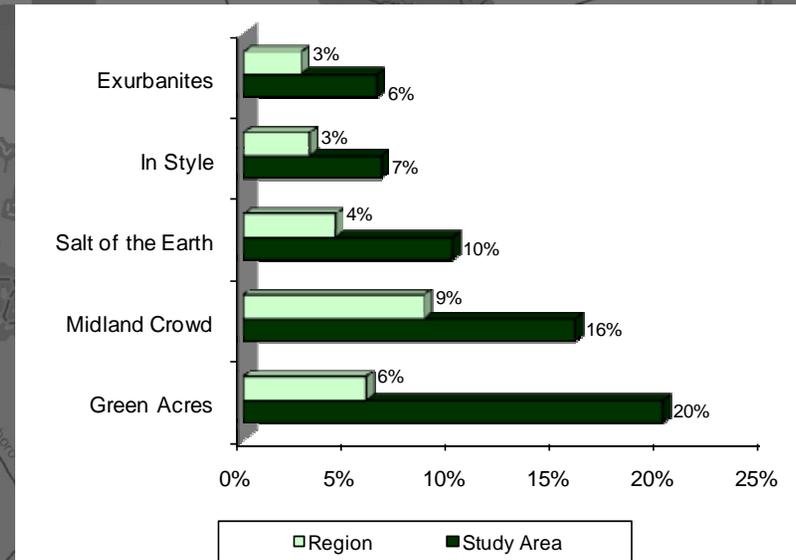
Regional Overview

- 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

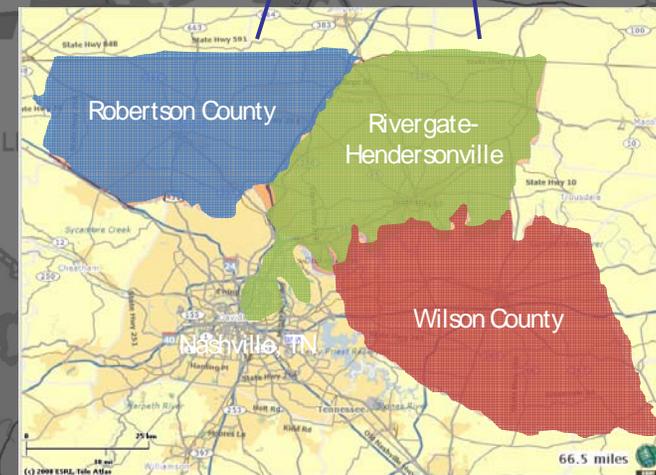
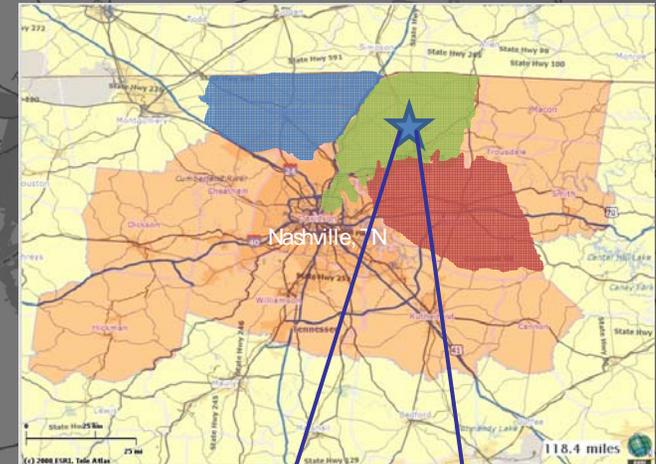
- Tri-County study area
 - **22% of regional population**
 - Median household income 14% less
 - More family households
 - **Nearly half of households in Sumner County**
- Top Tapestry Segments
 - Married couples
 - Suburban and rural living
 - Home and garden improvement
 - Outdoor recreation

	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)

nty Boundary

er Body

state Highway

65
Williamson
County

Wilson County

Rutherford County

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



y Area
ville MPO Planning Bound
nty Boundary
er Body
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 County**
- 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

ville MPO Planning Boundary (Portion Shown)

nty Boundary

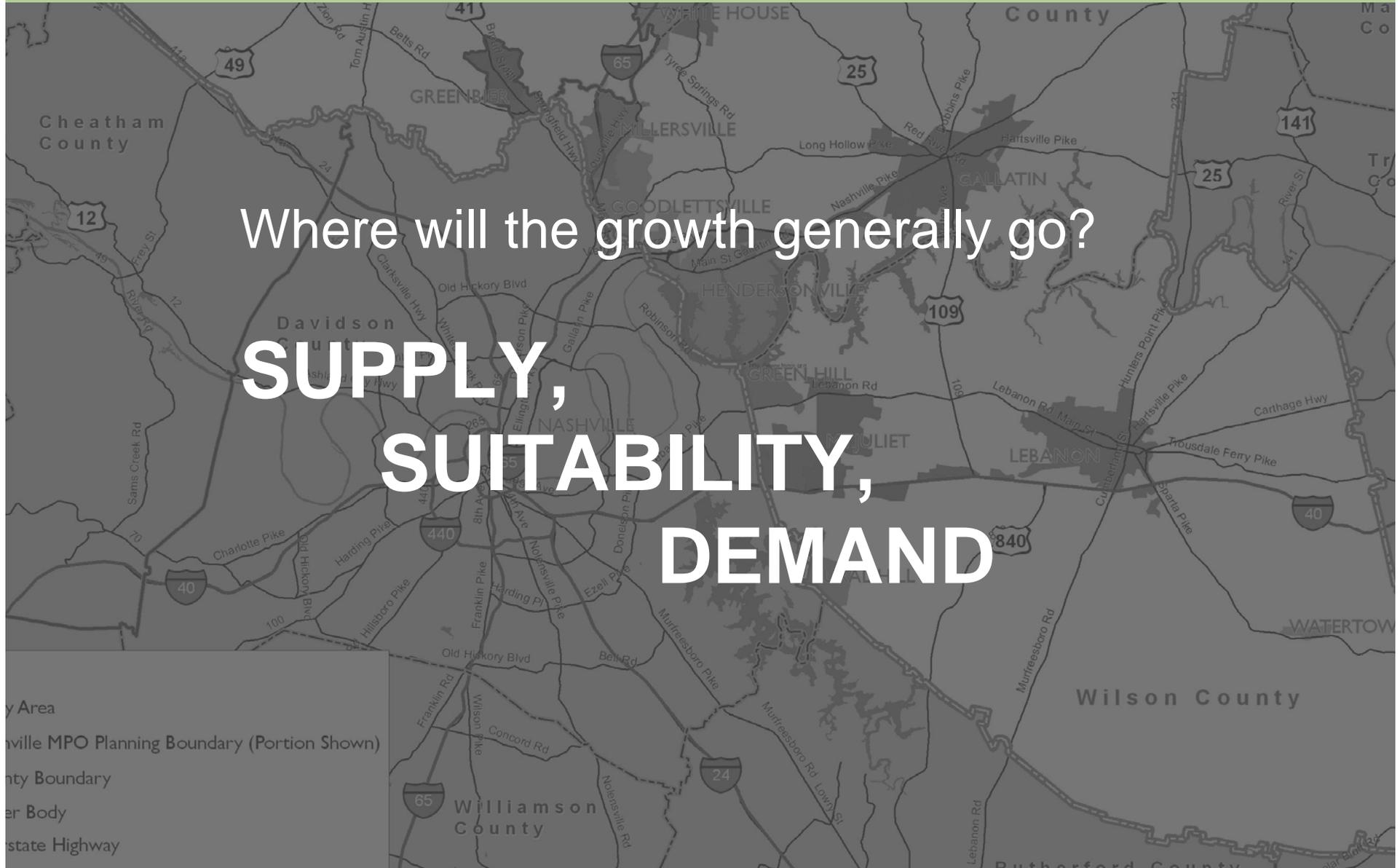
er Body

state Highway

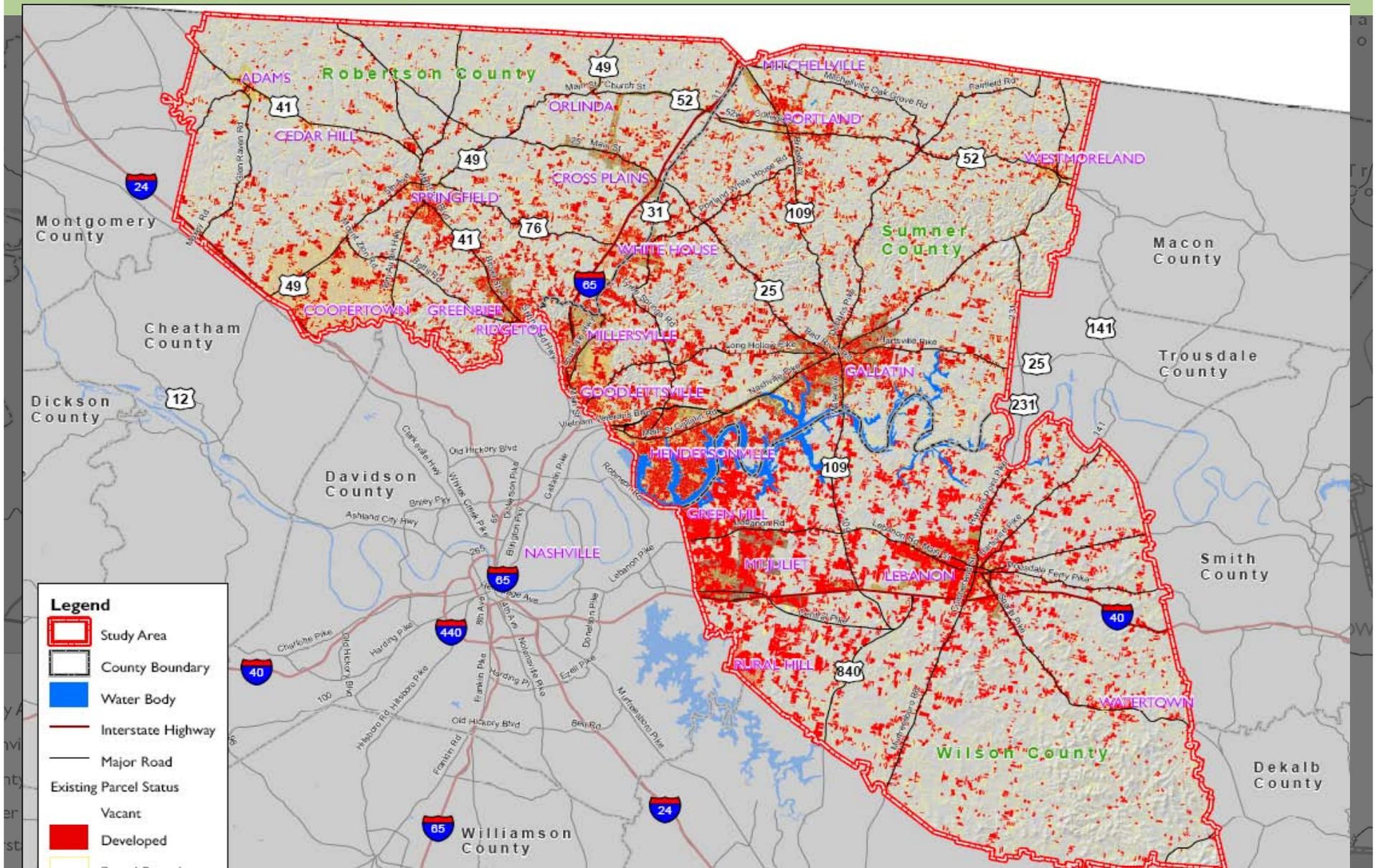
Williamson County

Where will the growth generally go?

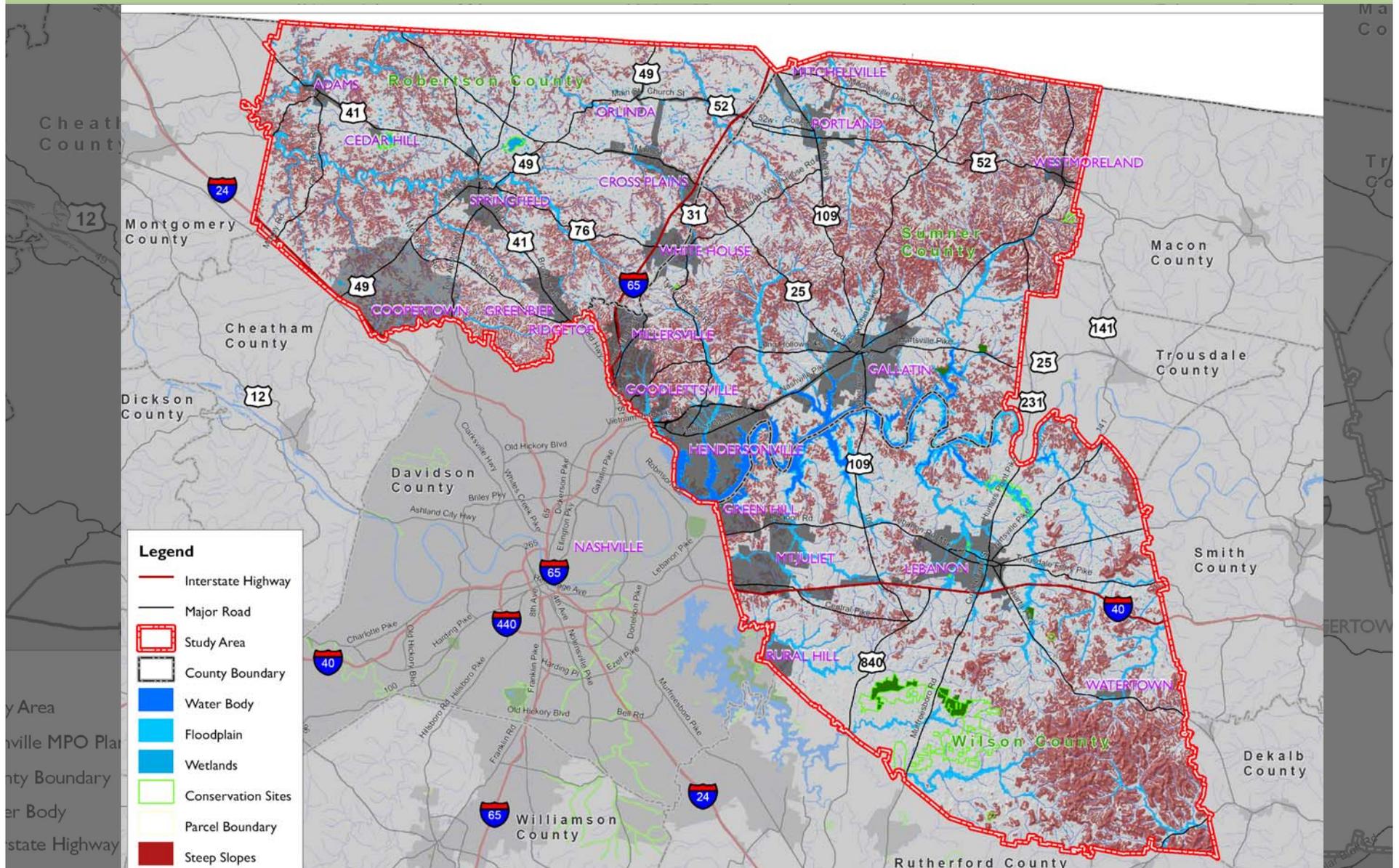
**SUPPLY,
SUITABILITY,
DEMAND**



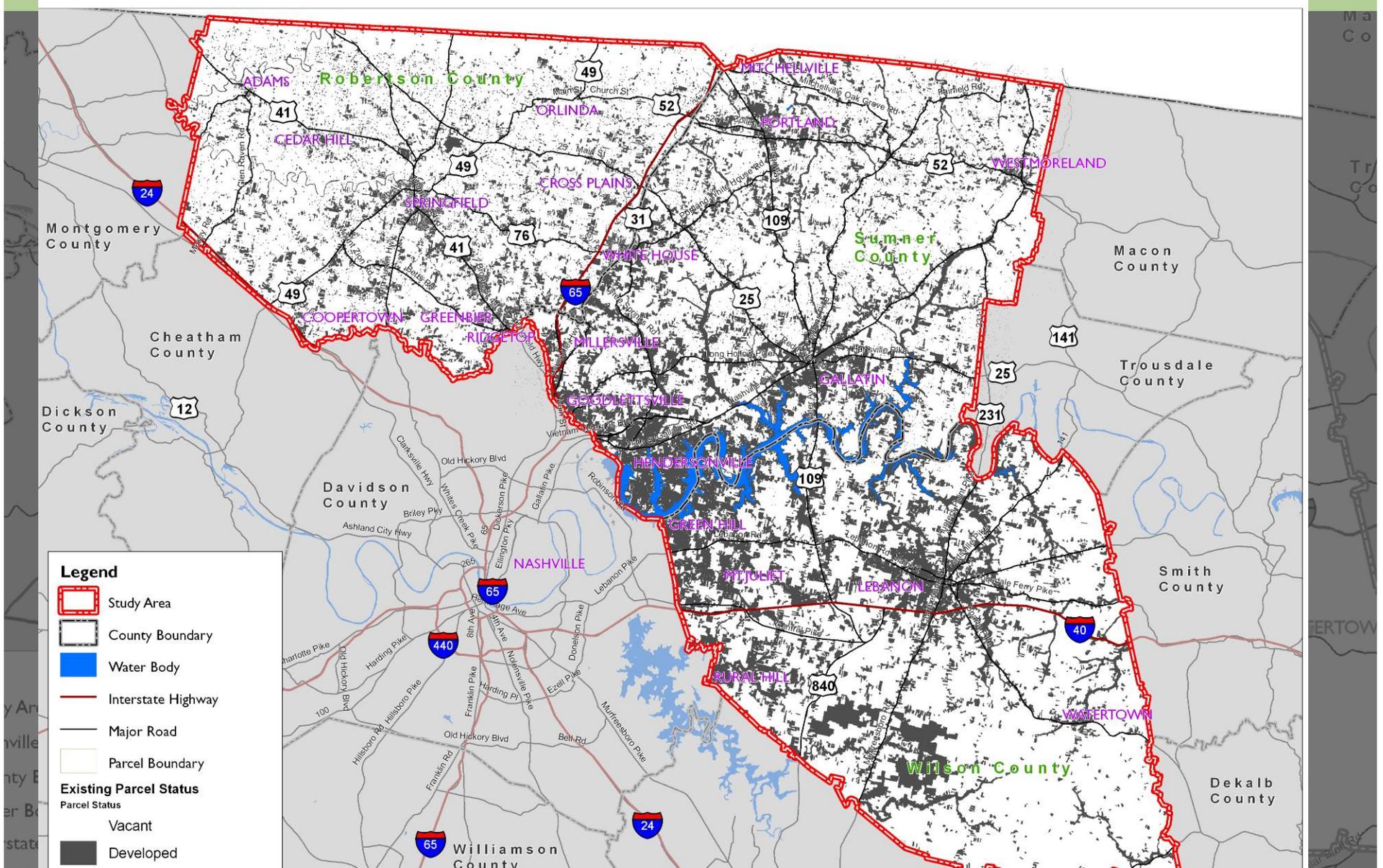
Supply - Existing Development



Supply – Environmental Constraints (Environment, Parks, and Open Space)

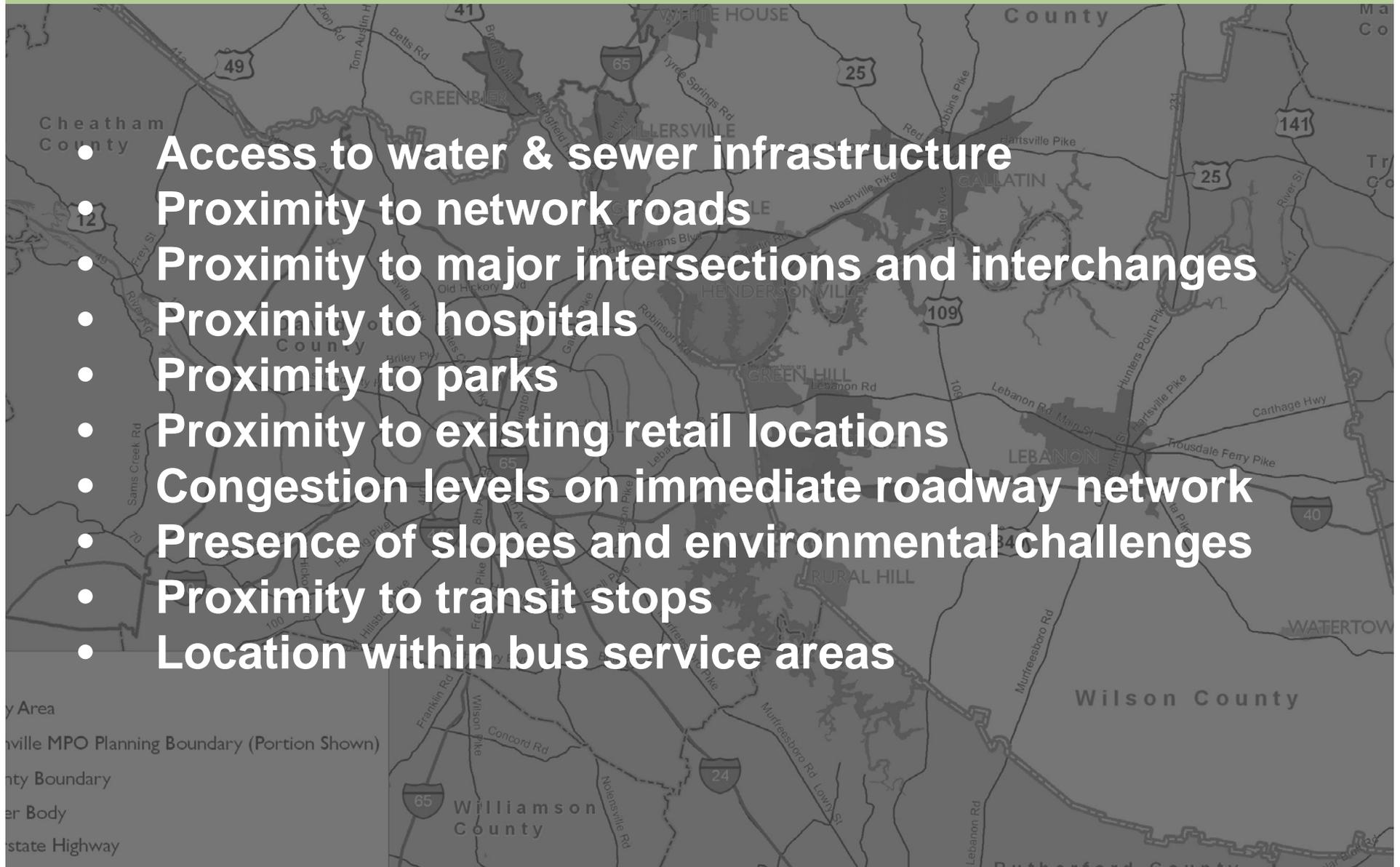


Supply – Net Available Land

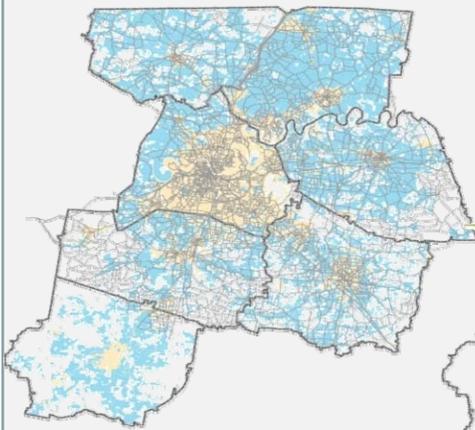


Suitability Factors

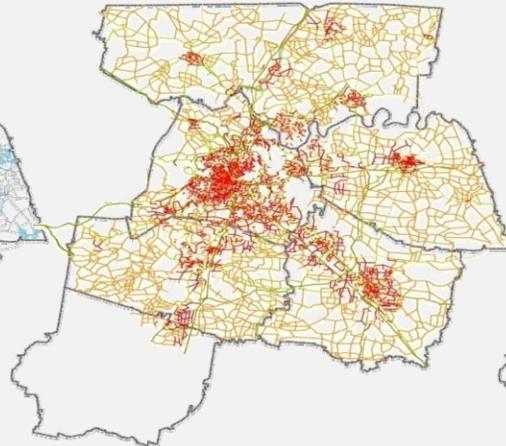
- Access to water & sewer infrastructure
- Proximity to network roads
- Proximity to major intersections and interchanges
- Proximity to hospitals
- Proximity to parks
- Proximity to existing retail locations
- Congestion levels on immediate roadway network
- Presence of slopes and environmental challenges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



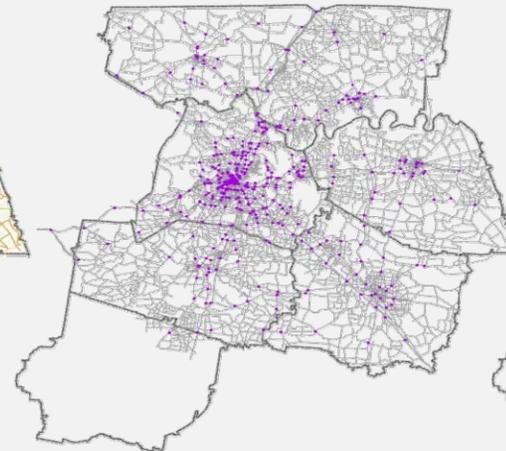
Suitability Factors Illustrated



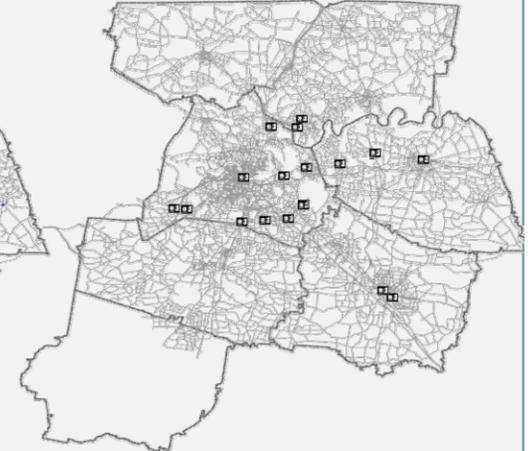
Water and Sewer Service Areas



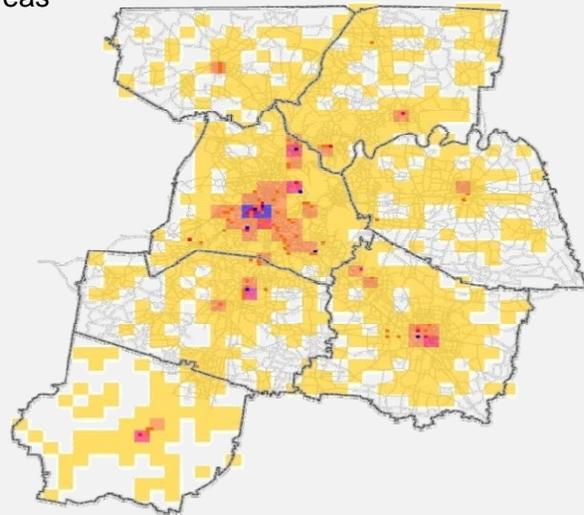
Network Road Speeds



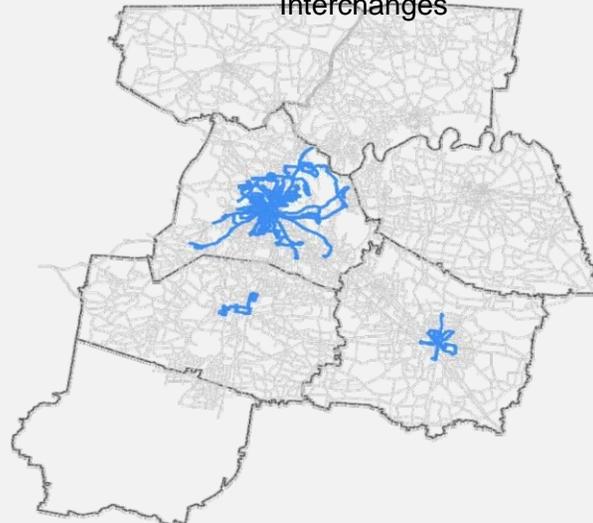
Major Intersections & Interchanges



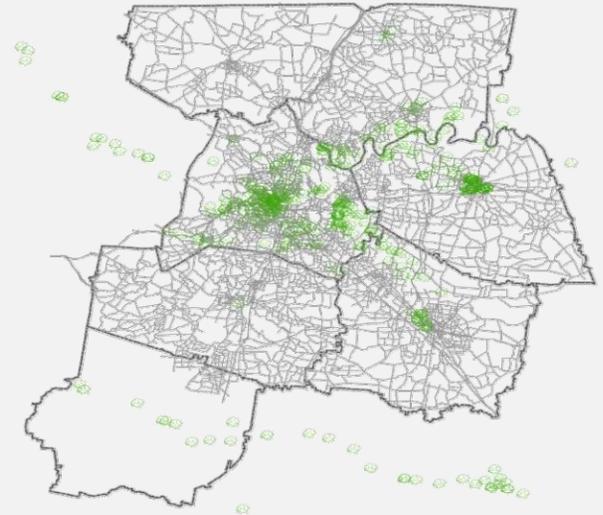
Transit Stations



Retail Density Grids

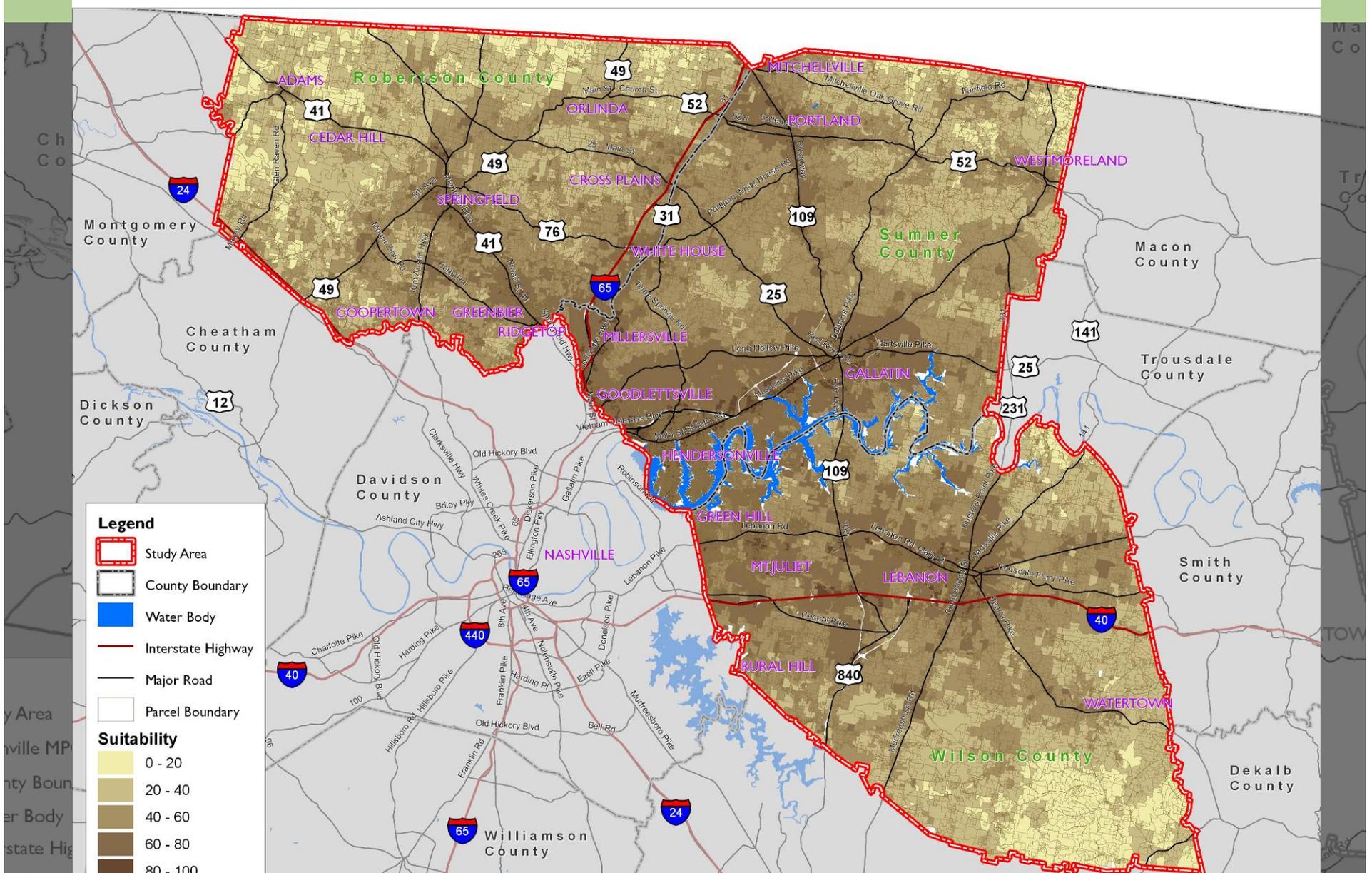


Bus Routes

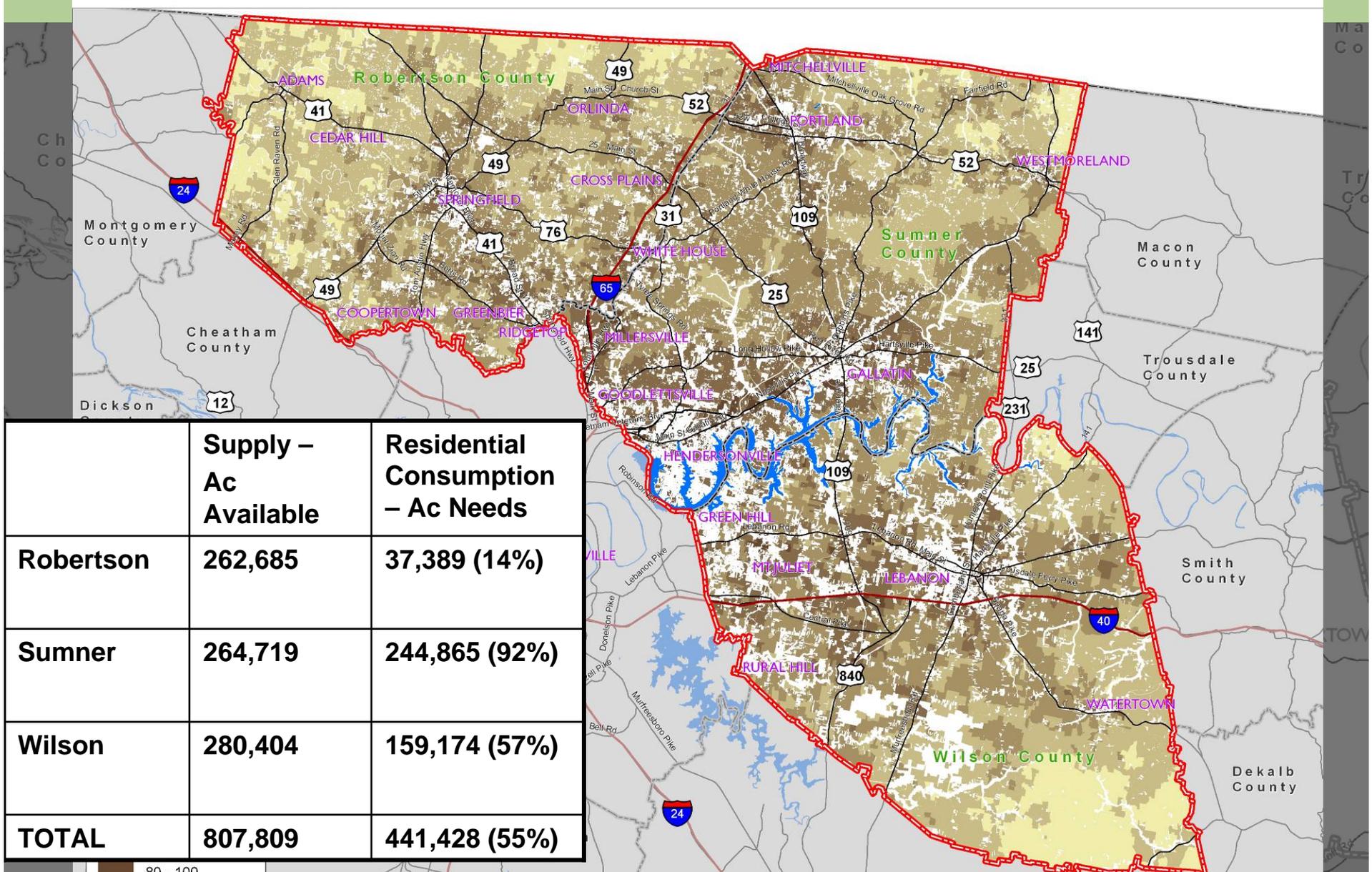


Parks and Recreation Areas

Tri-County Suitability Map



TriCounty Suitability Map – Net Available



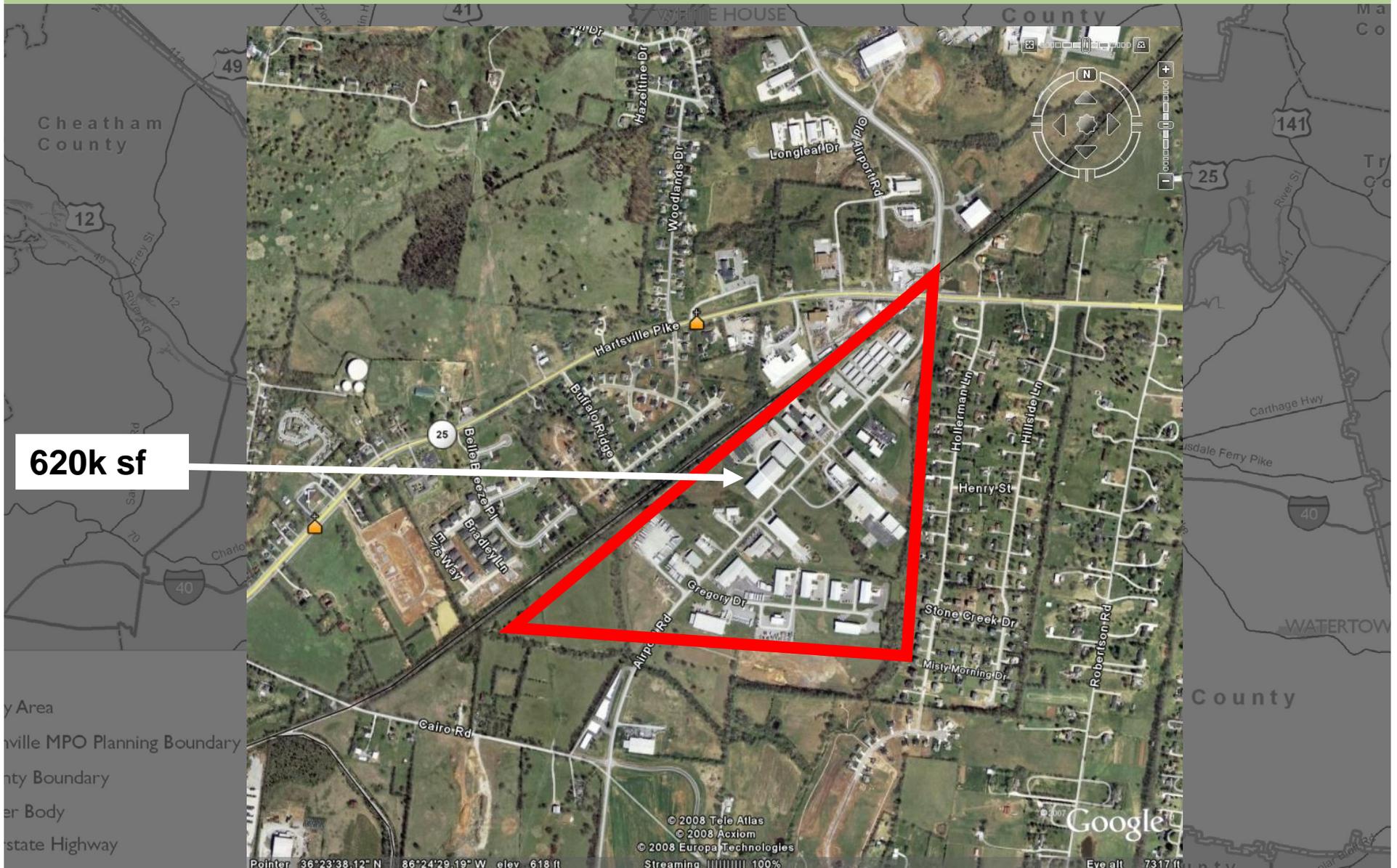
Future Demand Analysis

• 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

Future Demand Analysis – Industrial



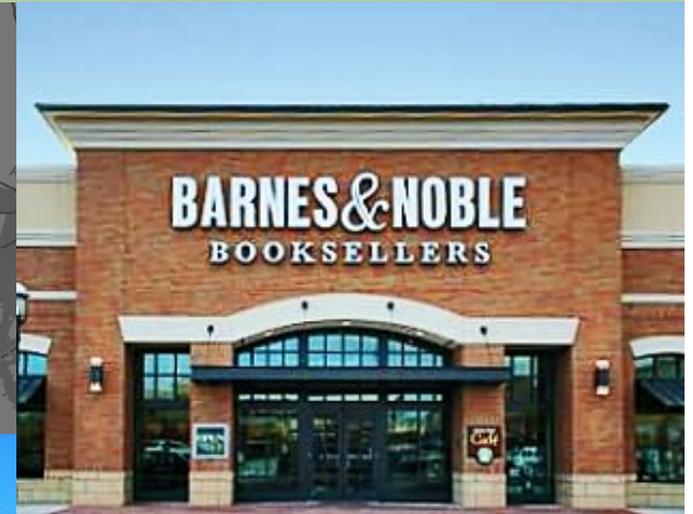
Future Demand Analysis – Retail

Indian Lake -

850,000 sf retail
3,000,000 office
16 screen movie theatre
1,000 du residential

Rivergate Mall -

1,129,035 sf retail



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

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

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%

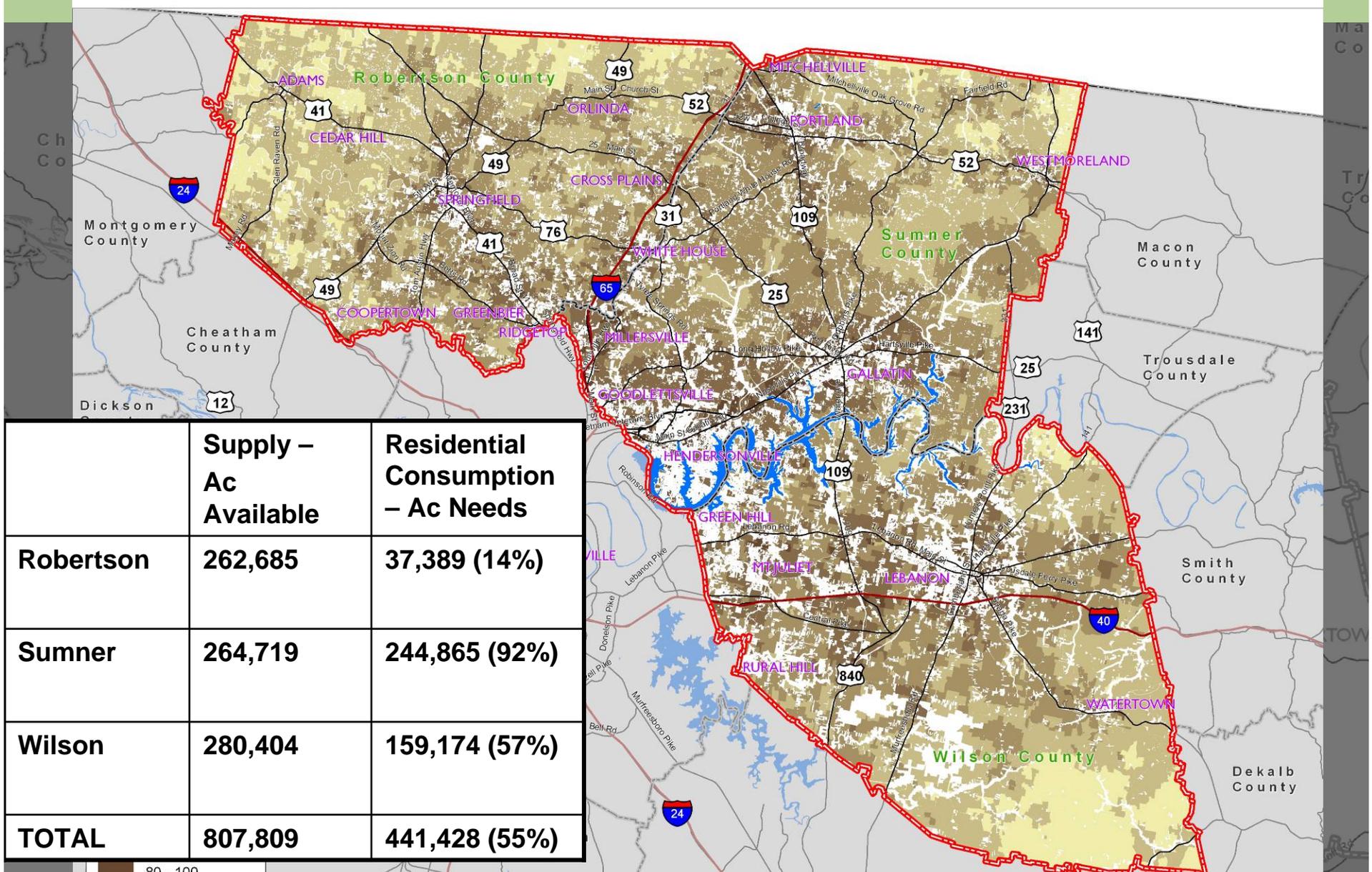
Source: Woods & Poole and BBPC Report, 2008

Demand - Household Growth Forecast

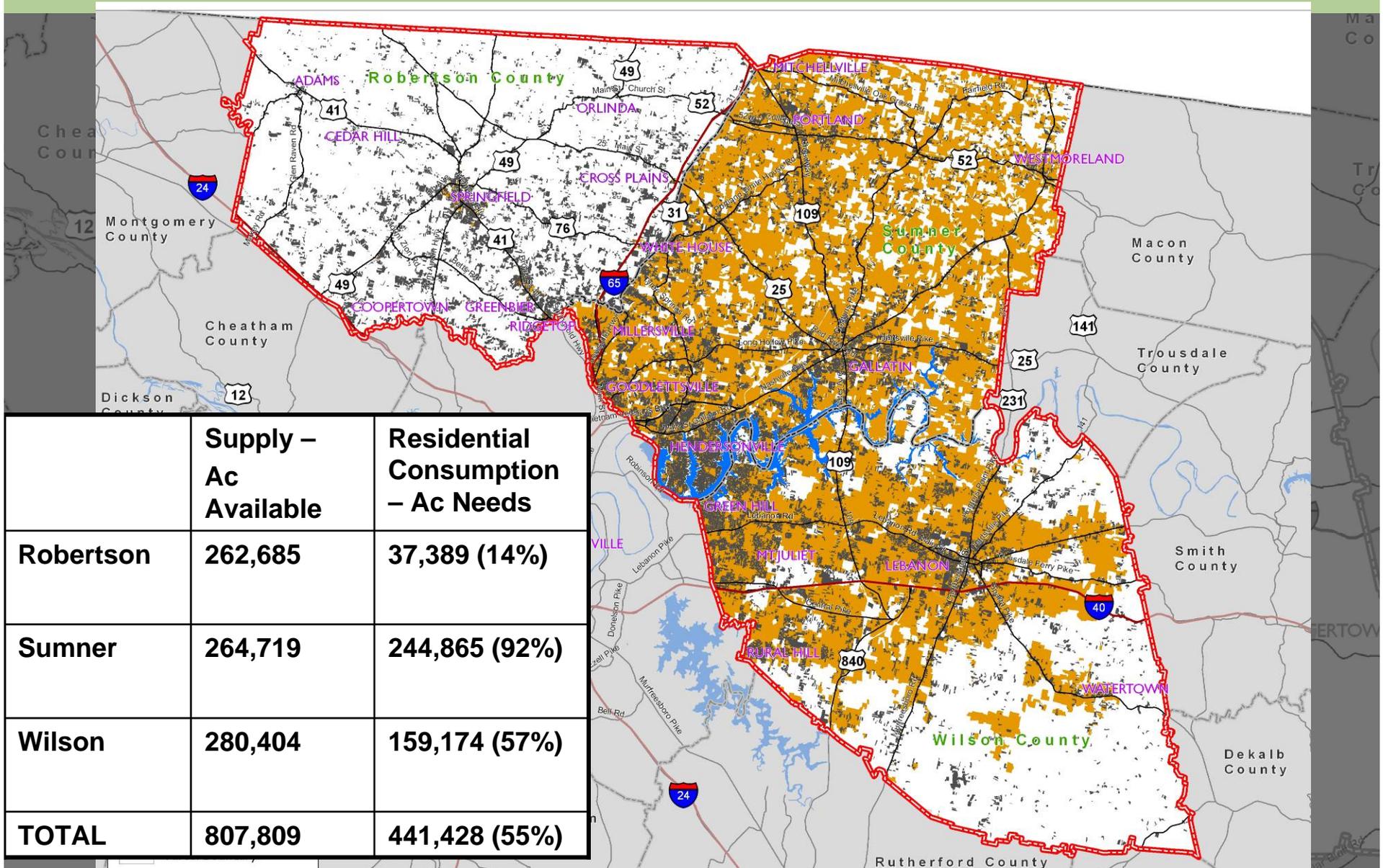
County	2008	2020	2035	% Annual Growth
Robertson	24,510	30,780	38,231	1.66%
Sumner	60,860	77,680	98,194	1.79%
Wilson	42,170	56,670	74,435	2.13%
Total	127,540	165,130	210,860	1.88%

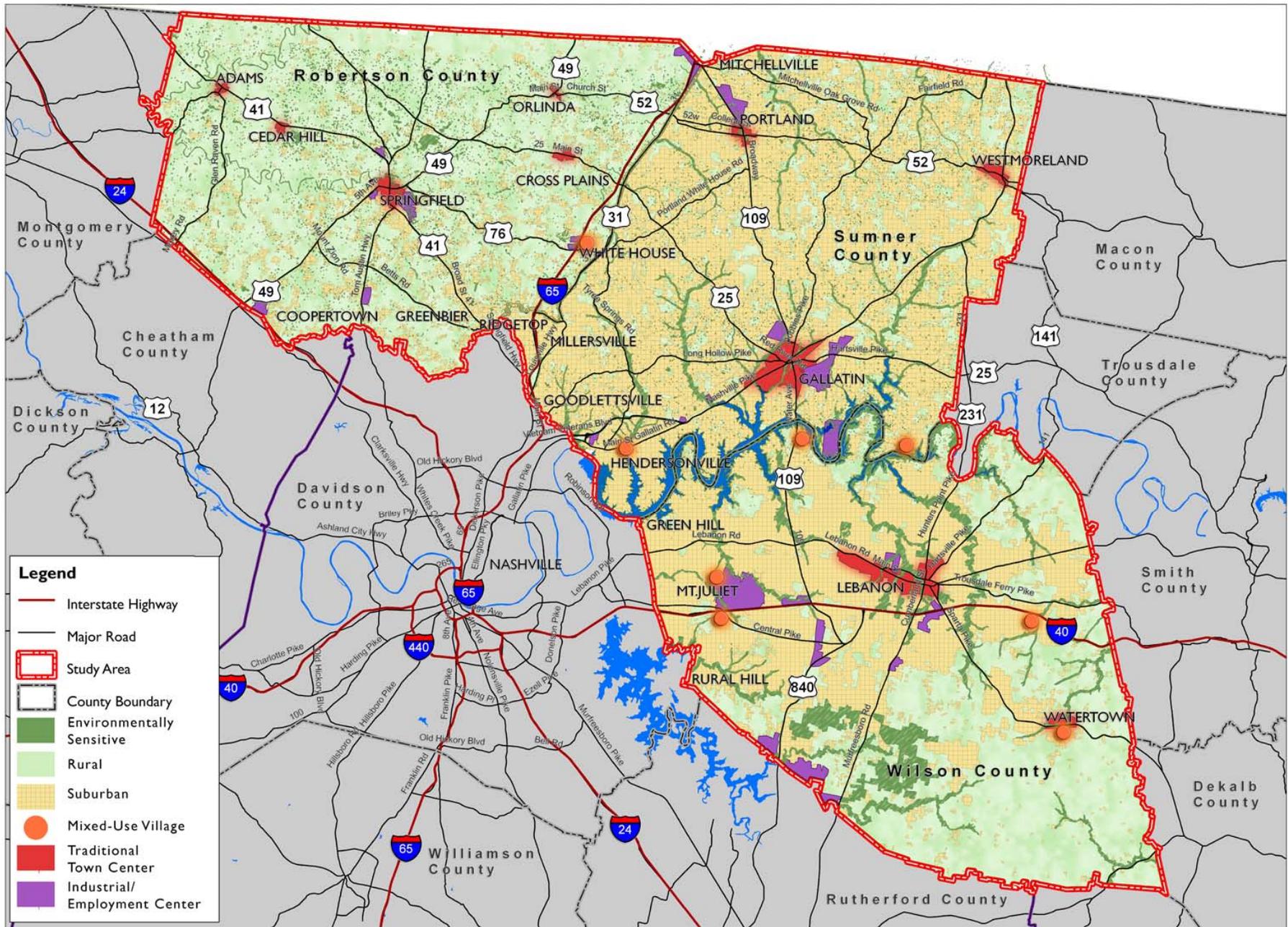
Source: Woods & Poole and BBPC Report, 2008

TriCounty Suitability Map – Net Available



Residential Allocation





Legend

- Interstate Highway
- Major Road
- Study Area
- County Boundary
- Environmentally Sensitive
- Rural
- Suburban
- Mixed-Use Village
- Traditional Town Center
- Industrial/Employment Center

CHARACTER AREA 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

LandDesign
 100 South Hickory St.
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ES&A Engineering and Architecture, Inc.
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 Nashville, TN 37203
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 Fax: 615.259.2222
 www.esa.com

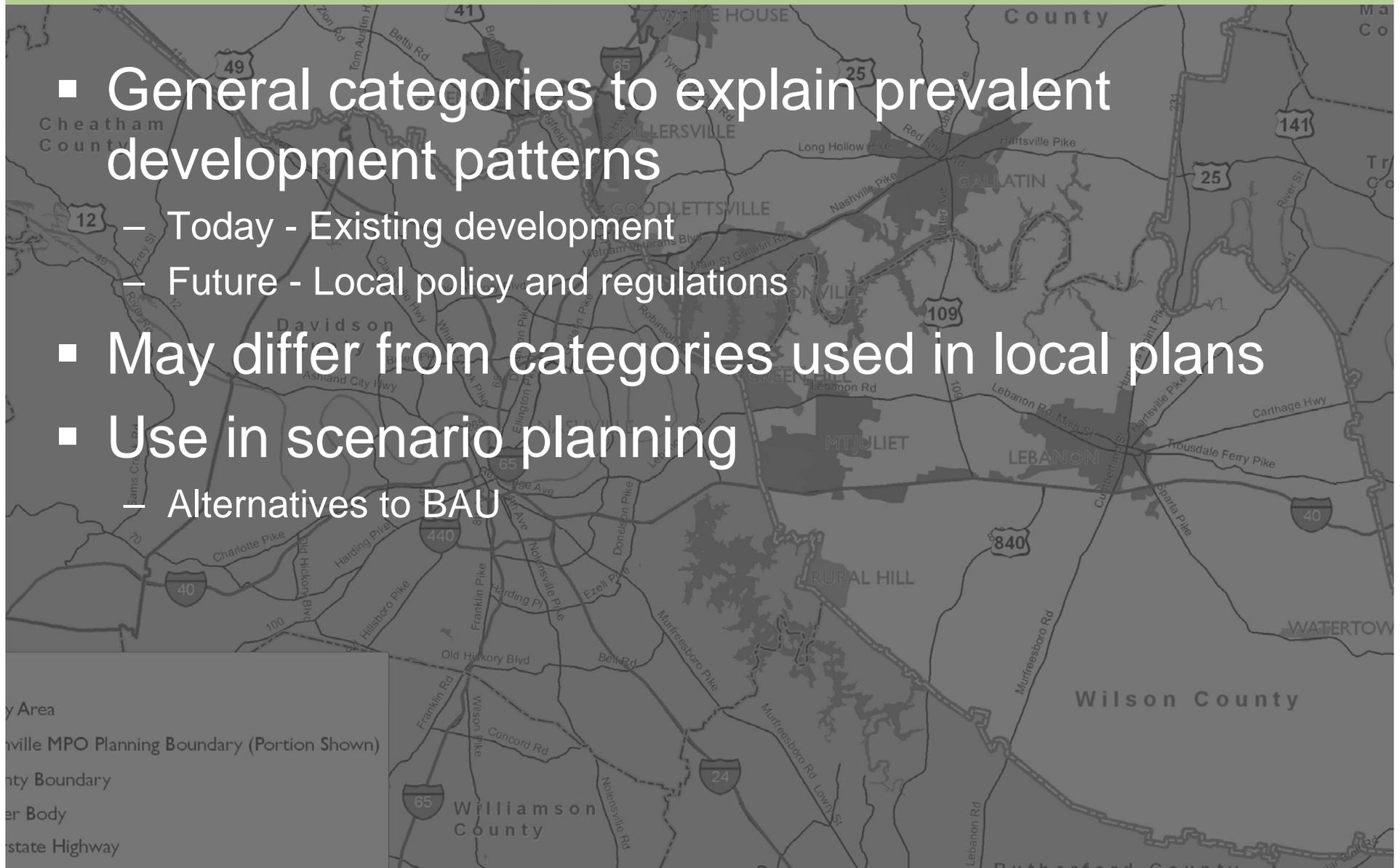
Source:
 The data for this map was derived from the geographic information system (GIS) data provided by the Tennessee Department of Transportation (Tennessee DOT) and the Tennessee Department of Environment and Conservation (Tennessee DEC). The data was processed and analyzed by LandDesign and ES&A. The data is provided as a service to the client and is not intended to be used for any other purpose without the written consent of LandDesign and ES&A.

June 2008 | LDU# 1007281

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Character Types

- General categories to explain prevalent development patterns
 - Today - Existing development
 - Future - Local policy and regulations
- May differ from categories used in local plans
- Use in scenario planning
 - Alternatives to BAU

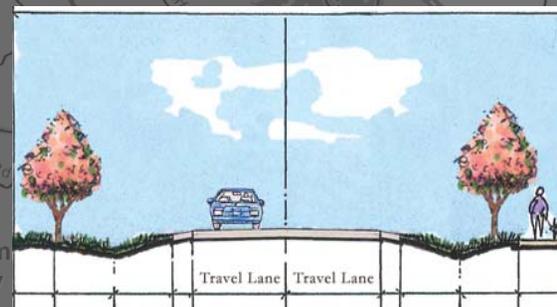
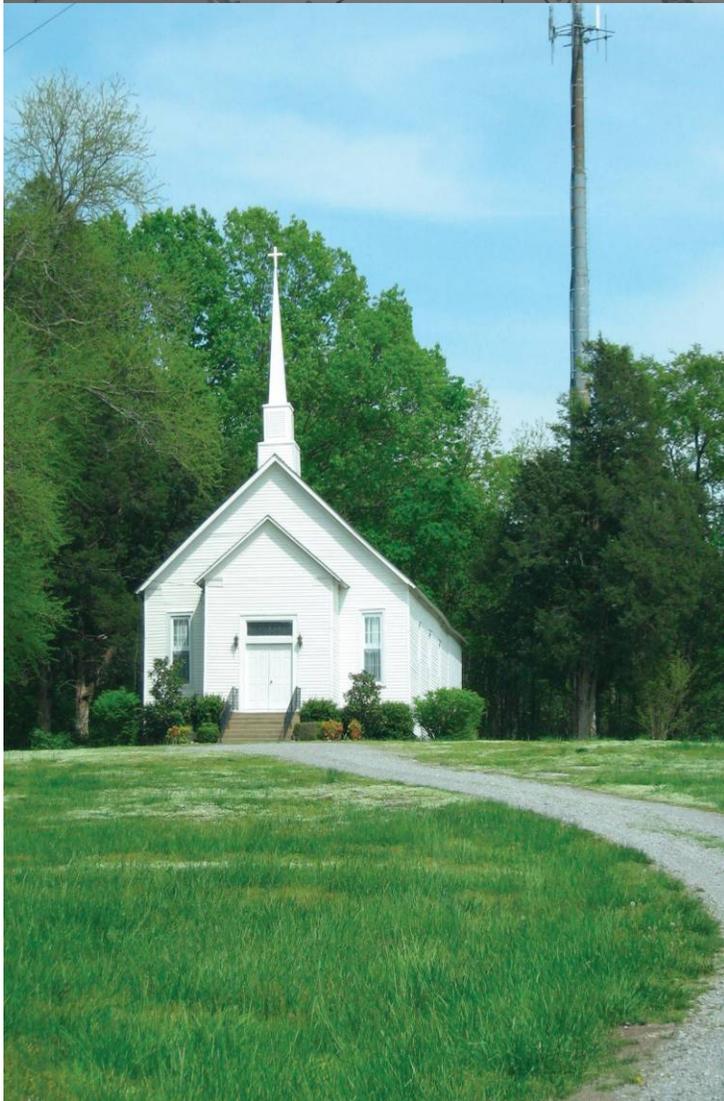


Character Types – Environmentally Sensitive

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



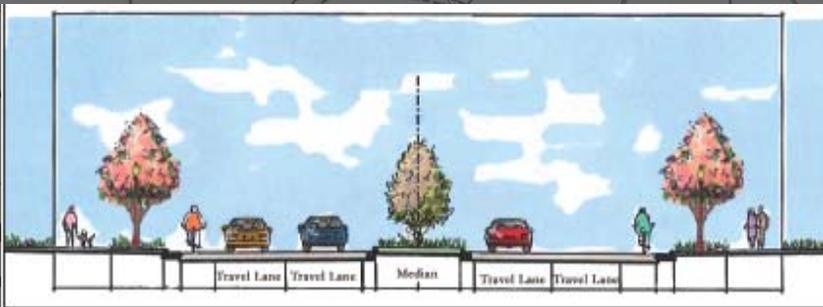
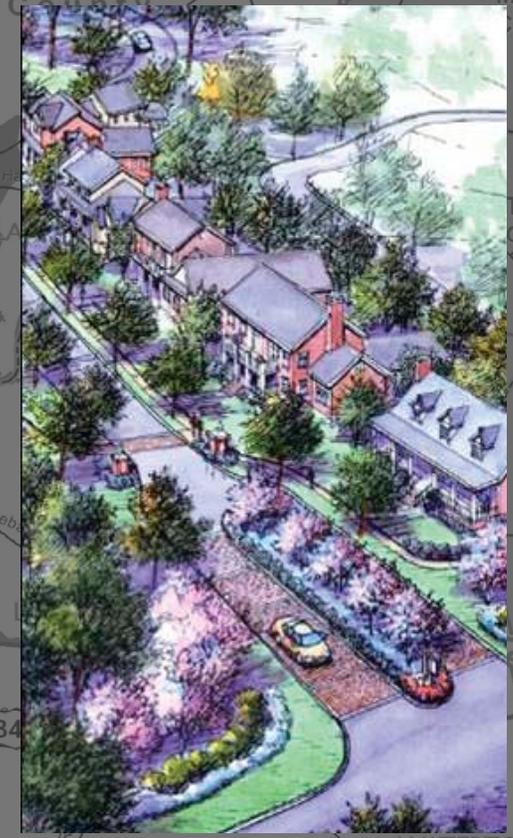
Character Types - Rural



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

Character Types - Suburban

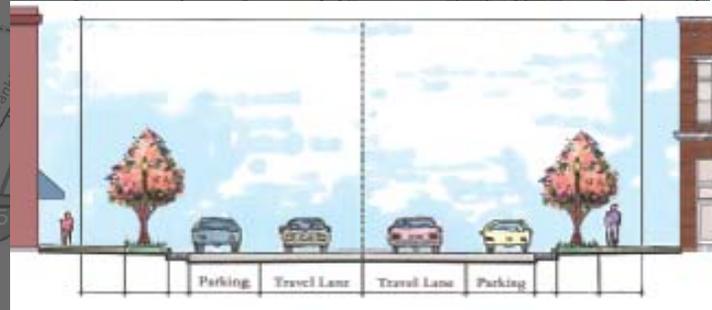
- Areas where a variety of land uses occur at low densities, generally separated across the landscape by specific use type
- Automobile-oriented, includes highway commercial areas found along major roadway corridors



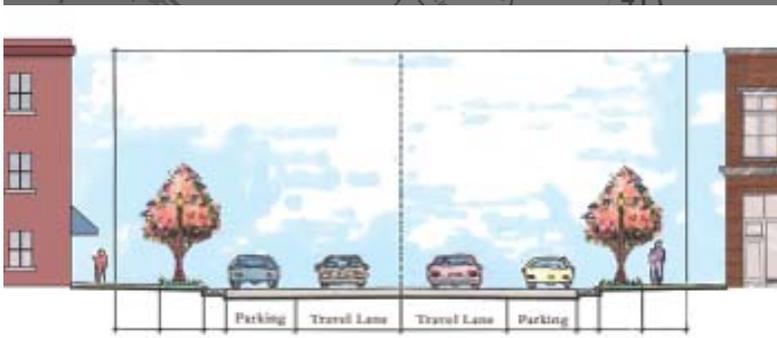
Character Types – Mixed-use Villages



- 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

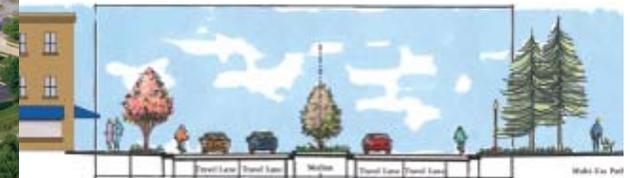


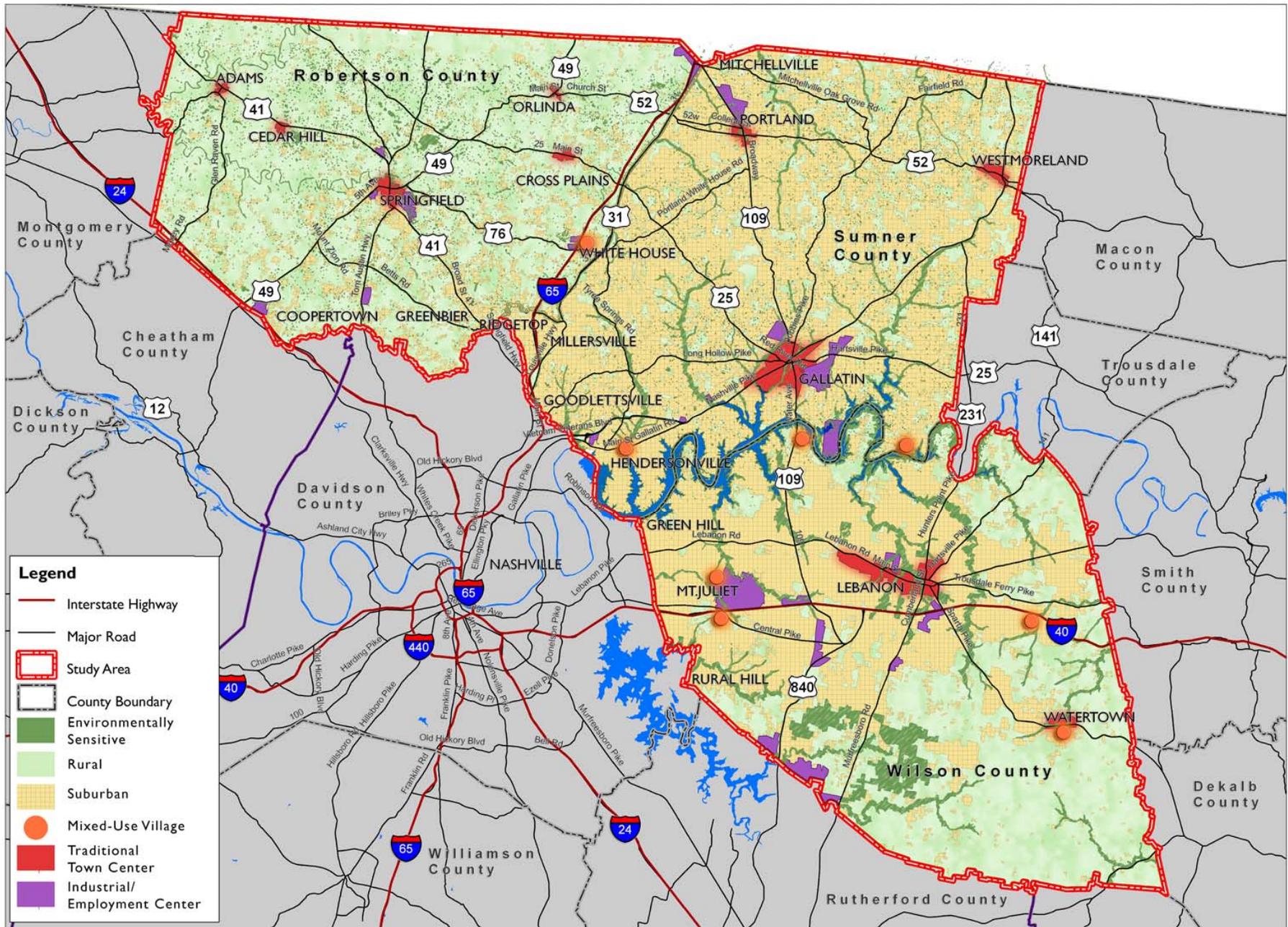
- Areas with a variety of land uses, typically at the highest densities in region
- Generally found in historic established core areas
- Pedestrian oriented, due to these areas being planned prior to euclidean zoning (separates land uses) and automobile dominance in the landscape (typically pre-1940s)



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





Legend

- Interstate Highway
- Major Road
- Study Area
- County Boundary
- Environmentally Sensitive
- Rural
- Suburban
- Mixed-Use Village
- Traditional Town Center
- Industrial/Employment Center

CHARACTER AREA MAP
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1 inch equals 9,000 feet
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June 2008 | LCI# 1007281

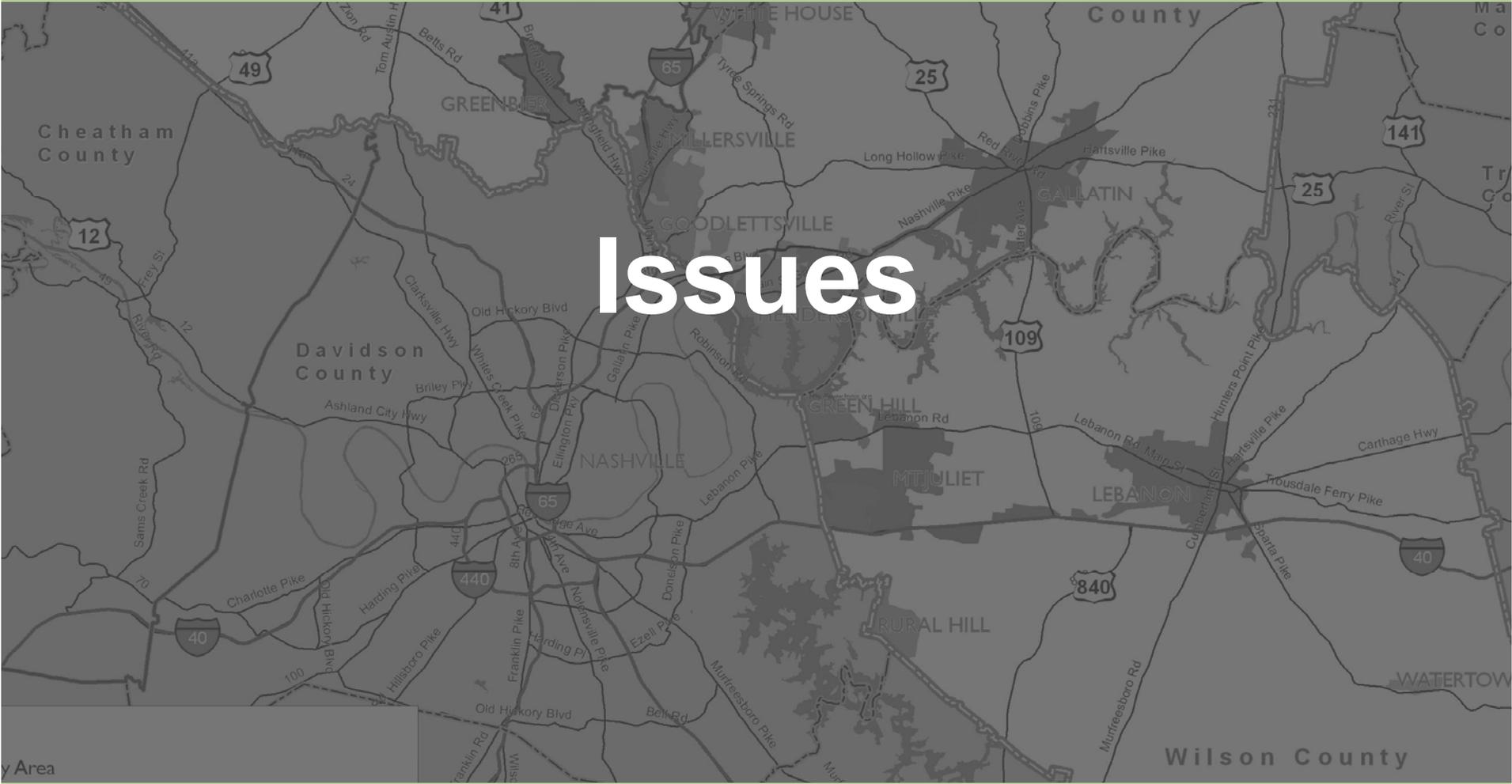


Source:
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Issues



Overview of Issues

Lack of context-sensitive roadway design
Auto-oriented development

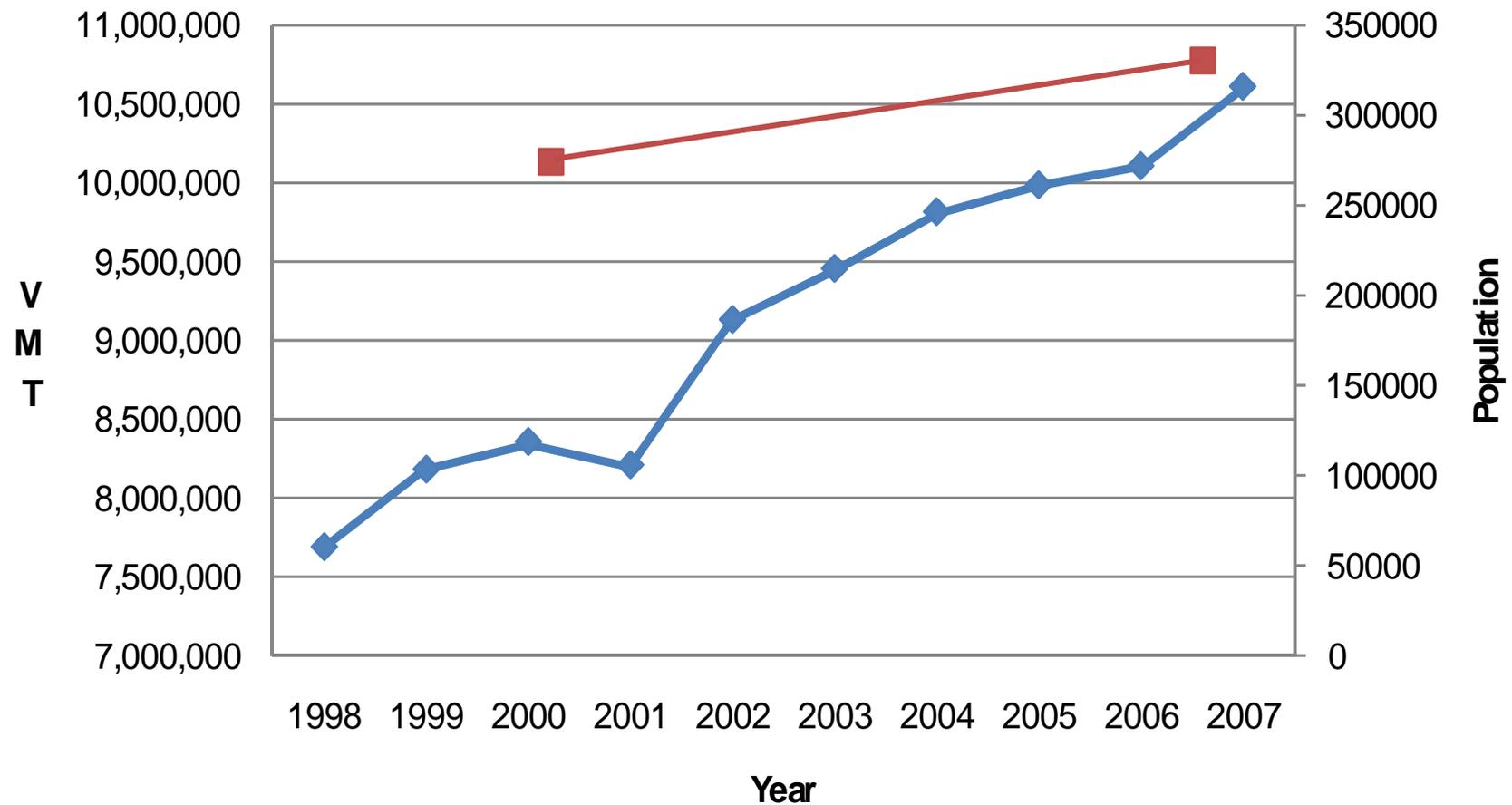


Overview of Issues



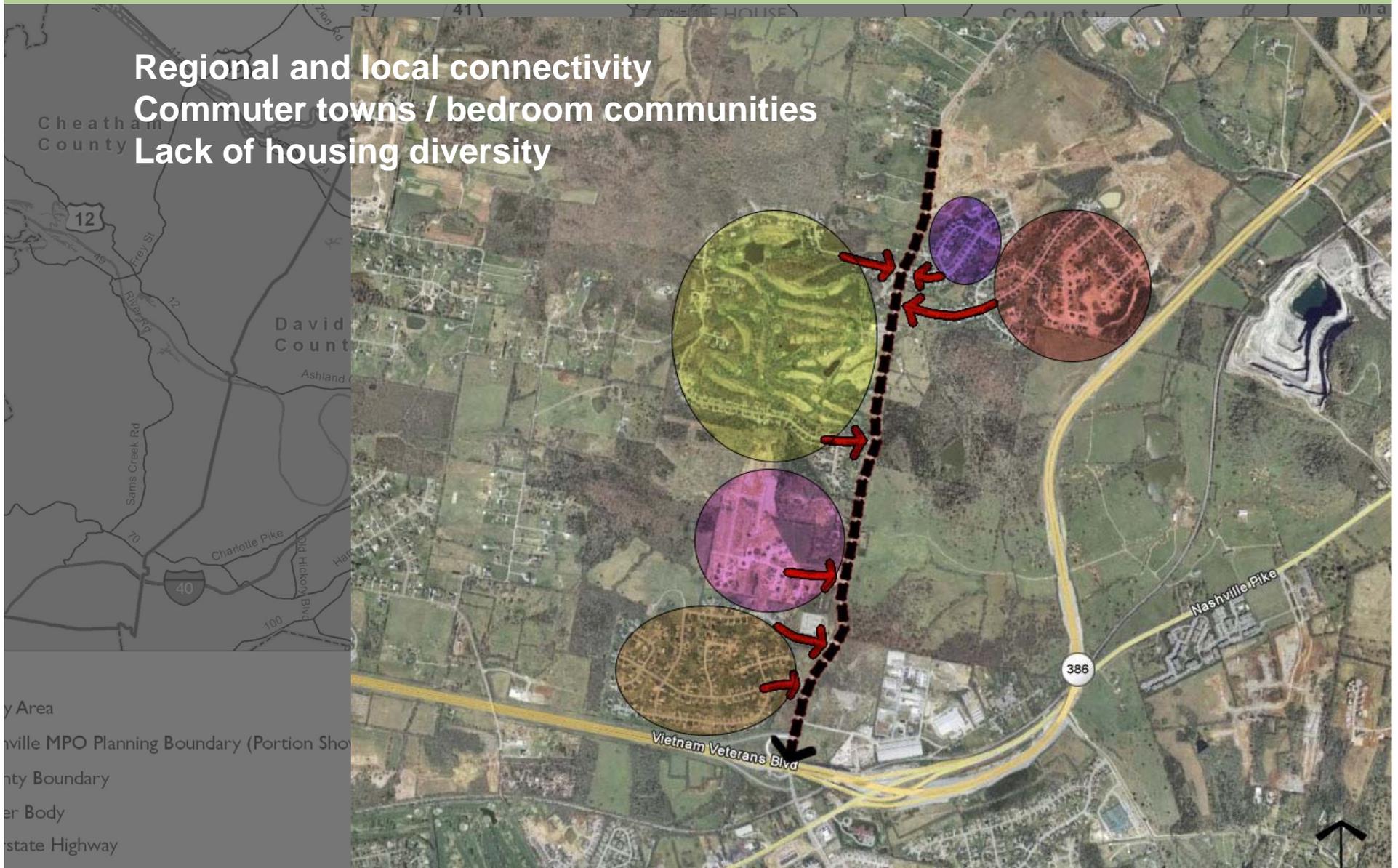
Overview of Issues

Tri-County Annual VMT Trend



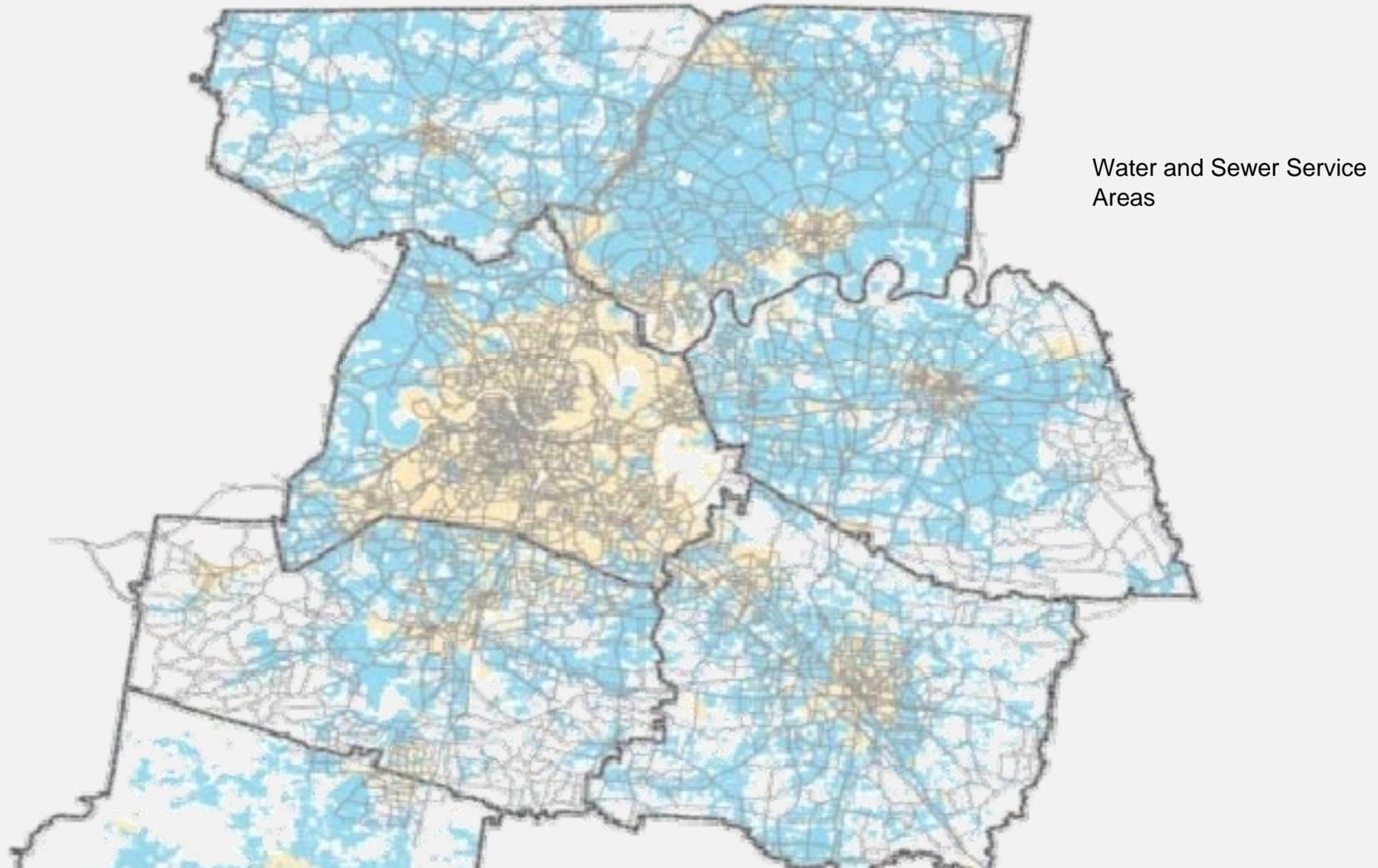
Overview of Issues

Regional and local connectivity
Commuter towns / bedroom communities
Lack of housing diversity



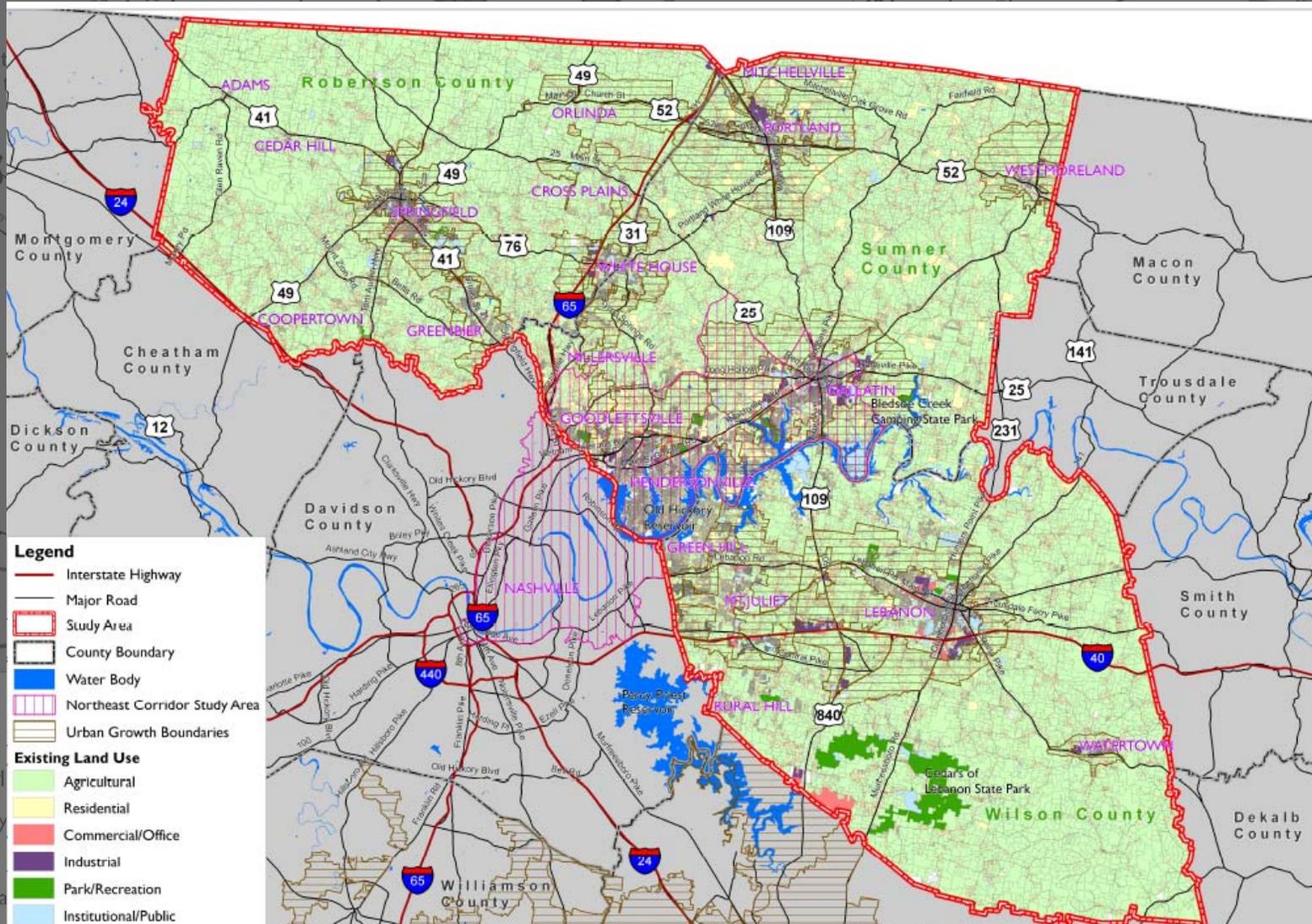
Overview of Issues

Public infrastructure – policies and availability



Overview of Issues

Open space preservation



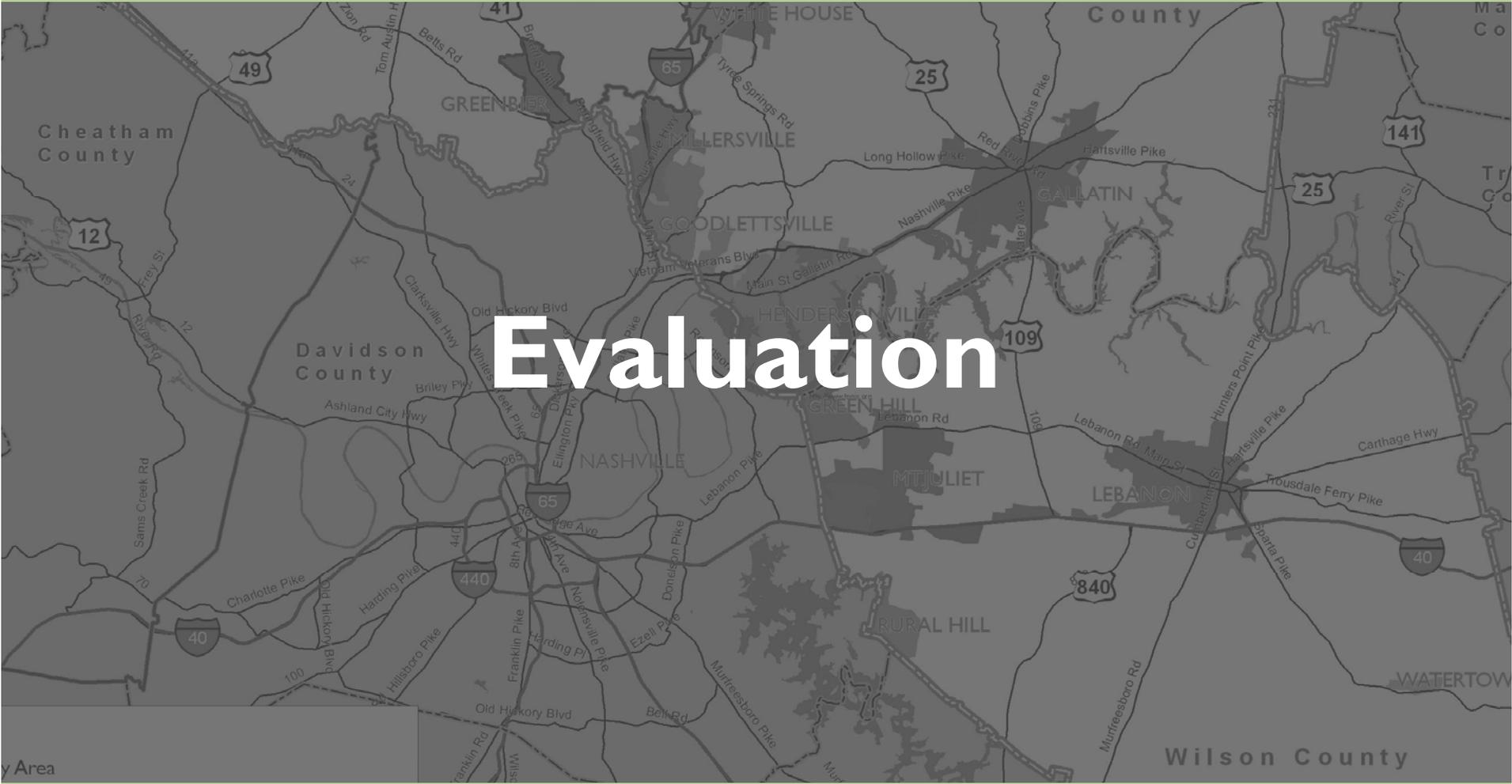
Common Goals



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.