

The one commonality of great cities and ‘cool’ places to live is that they have great people with great ideas. And, that’s exactly what you will find in the City of Murfreesboro. The City is excited about our future, and we are looking forward to moving into the next generation with you.

- CITY OF MURFREESBORO

CHAPTER 1

Planning Context

This compilation of Murfreesboro’s history, indicators, and existing conditions focuses on key influences that will shape the community’s future. The background information provides the appropriate context and assumptions to support the needs assessment and long-range planning decisions throughout the comprehensive planning process.



# MURFREESBORO 2035

Our Future Begins Now

## Introduction

In this Comprehensive Plan, Murfreesboro citizens present a bold vision that will reinforce and strengthen the City’s position as an innovator, as a proactive local and regional partner, and as a steward of a rich historical, cultural, and physical landscape. The region’s long-standing economic prosperity has ensured Murfreesboro both benefited from and “raised the tide” for all Middle Tennessee communities. The City self-identifies as “still having many of the charms of old; yet, there is an energy, a youthfulness, and an excitement here you do not find many other places. Murfreesboro is not stagnant; rather, it is ever-evolving...”

The two-year planning process used to inform this plan places the City squarely in the driver’s seat, ready to anticipate and manage the next generation of growth and development. Strategic and long-range planning processes equip community leaders to have a greater measure of control over its future - and the opportunities and challenges that change will bring. The analysis and directives in this plan were subject to rigorous review and iterative revision processes designed to build consensus and assure decision-makers that it represents the priorities and aspirations of Murfreesboro citizens.

While this plan brings into focus the 20-year outlook, the underlying premise of its approach is to leverage the success of the community’s past planning and implementation achievements. What makes Murfreesboro, Murfreesboro, and how can that unique identity evolve into a more cohesive community “signature.” As a survey conducted in this process clearly indicated, Murfreesboro is already a complete city. What are the big ideas or key differentiators that will make it more complete?



WHAT UNIQUE PHRASE BEST DESCRIBES MURFREESBORO AND COULD HELP BRAND THE CITY? CITY OF.....?

**“City of the American Dream. We have safety, education, employment, religion, medical, leisure options, retail - a city living within its means financially.”**



This plan intentionally builds off the tent poles serving as the foundation to other City planning initiatives:

- ▶ **Priority 1**, Safe and Livable Neighborhoods;
- ▶ **Priority 2**, Strong and Sustainable Financial and Economic Health;
- ▶ **Priority 3**, Excellent Services with a Focus on Customer Service; and
- ▶ **Priority 4**, Engaging Our Community.

These priorities will function as overarching themes woven into the overall planning strategy.

## Why Plan?

Murfreesboro's previous comprehensive plan was adopted in 1989, back when the population was roughly 45,000 residents. Fast forward nearly 25 years ahead and more than 2.5 times the population size, the City has a much more robust set of issues and opportunities, as well as a much wider net of human and financial resources to address them.

As Murfreesboro anticipates significant population growth in the near- and long-term, the comprehensive plan will serve as a living document that prepares the community for future development, redevelopment, and enhancement within the City's municipal limits and its urban growth boundary (UGB). Both the planning process and adopted plan have the end result of:

- ▶ Unifying the City's vision and associated goals regarding the future growth and enhancement of the community;
- ▶ Strengthening partnerships, communication channels, and sense of unified direction across all public, non-profit, and private community stakeholders;
- ▶ Engaging widespread citizen involvement in the identification and prioritization of leading community issues and opportunities;
- ▶ Guiding regulatory strategies to ensure community values and desired outcomes are managed and promoted;
- ▶ Providing greater predictability for residents, land owners, developers, and potential investors; and
- ▶ Fulfilling the statutory requirements necessary to establish land use controls (e.g., zoning ordinance, subdivision regulations).

## What is Murfreesboro 2035?

Over a two-year planning process, Murfreesboro residents worked together to develop the City's first comprehensive plan since 1989. This strategic planning process and final report, titled *Murfreesboro 2035*, will serve as the City's blueprint for growth and development over the next 20 years.

Comprehensive planning refers to the all-inclusive approach and process to addressing the complexities of future growth and change within a community. The final product of this process is a comprehensive plan document, which can become legally binding once adopted by the City Council. The document is then used as a policy guide regarding decisions about the development and enhancement of the community.

Comprehensive plans are sometimes referred to as land use plans, because in many cases they are dealing with spatial issues related to the appropriate uses of land. They address a range of compatibility issues between various uses of land, such as the management of parks and the preservation of natural resources, identification and preservation of historically significant lands and structures, and adequate planning for infrastructure needs.





**Public Relations Program**  
Source: Kendig Keast Collaborative

## Planning Principles

Each major plan element of this Comprehensive Plan will begin with a series of guiding principles which will establish a framework for making informed and enduring planning recommendations. The following principles will guide the analysis of the planning context:

**Principle 1, Participation and Inclusiveness.** Encourage broad citizen participation to benefit from the knowledge, insights, and support of all local residents. Create a community where people from all backgrounds, cultures, and income levels feel included and welcomed.

**Principle 2, Cooperation.** Coordinate planning with school districts, community organizations, adjacent communities, county, and regional government and, where possible, seek common solutions that are efficient and cost effective.

**Principle 3, Responsibility.** Accept responsibility for the health and quality of the community, and avoid shifting costs to future generations.

**Principle 4, Design.** Encourage great design and innovation. Identify ways that new development can respect the natural beauty and unique neighborhood identities that make Murfreesboro an attractive city. At the same time, look for ways to attract new industries that can thrive in the city

## Plan Outcomes

While this plan sets the stage for a community vision, it also presents next steps in the form of concrete and actionable recommendations. City officials and staff must make decisions that reflect the best interest and political will of the community. The Comprehensive Plan articulates this road map in the form of:

- ▶ Targeted programs and expenditures prioritized through the City’s annual budget process, including routine but essential functions such as code enforcement;
- ▶ Major public improvements and land acquisition financed through the City’s capital improvement program and related bond initiatives;
- ▶ New and amended City ordinances and regulations closely linked to the Comprehensive Plan objectives (and associated review and approval procedures in the case of land development, subdivisions, and zoning matters);
- ▶ Departmental work plans and staffing in key areas;
- ▶ Ongoing planning and studies that will further clarify needs, costs, benefits, and strategies;

[ Continued on page 1.7 ]

### THE COMMUNICATION PROGRAM FOR THIS PLANNING PROCESS FOLLOWED THE PRINCIPLE OF “EARLY AND OFTEN” COMMUNICATION WITH THE OBJECTIVES OF:

- PROACTIVELY PROVIDING ACCURATE AND TIMELY CITY INFORMATION TO A WIDE ARRAY OF CITY STAKEHOLDERS TO ENHANCE PUBLIC AWARENESS OF CITY PROGRAMS, SERVICES, INITIATIVES AND PROJECTS;
- INCREASING CIVIC PARTICIPATION AND ENGAGEMENT;
- COMMUNICATING CITY POLICY; AND
- PROMOTING TRANSPARENCY.

## City Roles



## Plan Elements

This Comprehensive Plan is divided into a series of plan elements, each pertaining to a critical aspect of the physical, economic, and cultural composition of the community. The sections outline specific issues that must be addressed in order to achieve what is envisioned by community leaders and residents. In response to these issues, a series of recommended actions are proposed that relate to policy and/or regulatory changes, programmatic initiatives, and capital improvement projects. While these recommendations are comprehensive and intended to be accomplished over the 20-year horizon of this plan, near-term actions must be realized in order to take the first step toward successful implementation.

Core topics of the plan include:

- ▶ **Growth Capacity and Infrastructure** ..... Chapter 2 preview, pg. 1.22
- ▶ **Mobility** ..... Chapter 3 preview, pg. 1.30
- ▶ **Land Use and Character** ..... Chapter 4 preview, pg. 1.36
- ▶ **Housing and Neighborhoods** ..... Chapter 5 preview, pg. 1.40
- ▶ **Parks, Recreation, and Natural Resources** .... Chapter 6 preview, pg. 1.50
- ▶ **Economic Development** ..... Chapter 7 preview, pg. 1.56

The recommendations within each of these strategies are prioritized in *Chapter 8, Implementation*, with decisions made as to the sequencing of implementation activities, based on the capacity to fulfill each initiative, and the ability to obligate the necessary funding and secure support and partnerships. This section includes an associated organization and management plan and a strategy and schedule for regular plan reviews, amendments, and periodic updates.





## City Functions Relating to the Comprehensive Plan

City staff members are generally responsible for managing day-to-day plan implementation. The City operates under a Council Manager form of government. The governing body is the City Council, which consists of seven members who serve four-year, staggered terms of office on an at-large basis. The City Council appoints a City Manager, who is responsible for carrying out the policies and ordinances of the City Council and overseeing daily operations with the support of the City's departments. Given the interdisciplinary nature of the comprehensive planning process, these City functions have overlapping inputs to this plan.

**TABLE 1.1, CITY FUNCTIONS**

- Primary Implementation Role
- Secondary Implementation Role

	Growth Capacity and Infrastructure	Mobility	Land Use and Character	Housing and Neighborhoods	Parks, Recreation, and Natural Resources	Economic Development
	Chapter 2	Chapter 3	Chapter 4	Chapter 5	Chapter 6	Chapter 7
Building and Codes	■		■	■		■
City Manager's Office	■	■	■	■	■	■
Communications / IT	■	■	■	■	■	■
Community Development	■		■	■		
Engineering	■	■	■			
Fire and Rescue	■		■	■		
Legal	■	■	■	■	■	■
Parks and Recreation / Golf	■	■	■	■	■	■
Planning	■	■	■	■	■	■
Police	■	■	■	■		
Solid Waste	■					
Transportation / ROVER / Airport	■	■	■	■	■	■
Urban Environmental	■	■	■	■	■	■
Water and Sewer	■		■	■	■	■

Source: Kendig Keast Collaborative

- ▶ Pursuit of external grant funding to supplement local budgets and/or expedite certain projects; and
- ▶ Initiatives pursued in conjunction with other public and private partners to leverage resources and achieve successes neither could accomplish on their own.

Despite the breadth of these strategies, comprehensive plans are limited in scope. Of necessity, vision and policy documents must remain relatively general in order to set a framework for future decision-making. While the plan will not address every community challenge in detail, it is meant to identify the overall strategy and end goals. It is written for a diverse audience, including residents, business and land owners, major institutions, civic groups, elected and appointed officials, and City staff. Lastly, this document is designed as a “work in progress” – to be updated and amended as the community experiences unforeseen changes and new opportunities.

## Statutory Requirements

Comprehensive planning is generally considered not mandatory in the State of Tennessee. A general or comprehensive plan is not required for local governments to adopt and enforce subdivision regulations and zoning ordinances. There is also no requirement for consistency between a comprehensive plan and the City’s zoning ordinance and subsequent amendments.

In 2008, an amendment to Tennessee Code Annotated Title 13 gave local governments the authority for a municipal or county planning commission to recommend the adoption of a comprehensive plan by its legislative body. If that procedure is followed and results in adoption, the plan becomes a legal document of the legislative body, and the law then requires that all land use decisions must be consistent with the adopted plan.

As a result of these amendments to Tennessee state planning law, this Comprehensive Plan has greater significance and legally binding strength than previously possible. Once recommended by Murfreesboro’s Planning Commission and adopted by City Council, land use decisions must be consistent with its provisions.

## Community Engagement

The overall community outreach approach for developing this plan relied on a combination of “high-touch” and “high-tech” strategies to foster meaningful, early, and

### CITY COUNCIL DIRECTIVE:

**“This community engagement process should be empowering for the public, engaging people in the process, and maintaining their continued participation. The [project team] should embolden the community to think beyond the status quo, fostering an environment of cooperation in working together for Murfreesboro’s future. The methods of public outreach and involvement should be advanced and inventive in manners that encourage residents to connect within the community to bring value to the plan.”**

often citizen input. Over a two-year period between July 2014 and May 2016, the engagement program included a wide variety of meeting formats, locations, and times to accommodate the needs of all ages, interests, and abilities of the Murfreesboro community.

The meetings and workshops targeted a broad cross-section of residents and business owners – both those that hold traditional leadership positions such as elected and appointed officials – as well as everyday citizens that are less likely to attend community events. In addition to hosting plan-related activities in small, medium-, and large-group settings, the project team also coordinated with City staff to plan and facilitate

[ Continued on page 1.8 ]

## EDUCATIONAL VIDEOS

The City's award-winning Communications Department is responsible for disseminating information to community stakeholders through Murfreesboro CityTV, the City's new website (2012), social media, press releases, and media relations (television, radio, print, and web organizations).

As part of this process, the Department created a number of original YouTube videos that balanced informative messages about the planning process with a light touch of humor.



Comprehensive Plan Promotion



MindMixer Online Discussion Forum Promotion



"Storytellers" Interview on Comprehensive Plan

a series of outreach activities intended to engage the community's public and private leadership, as well as residents, business owners, property owners, local organizations, and others interested in setting strategic priorities for the community's future. Coordination with other external agencies and organizations was initiated early on and throughout the process to take advantage of all possible resources.

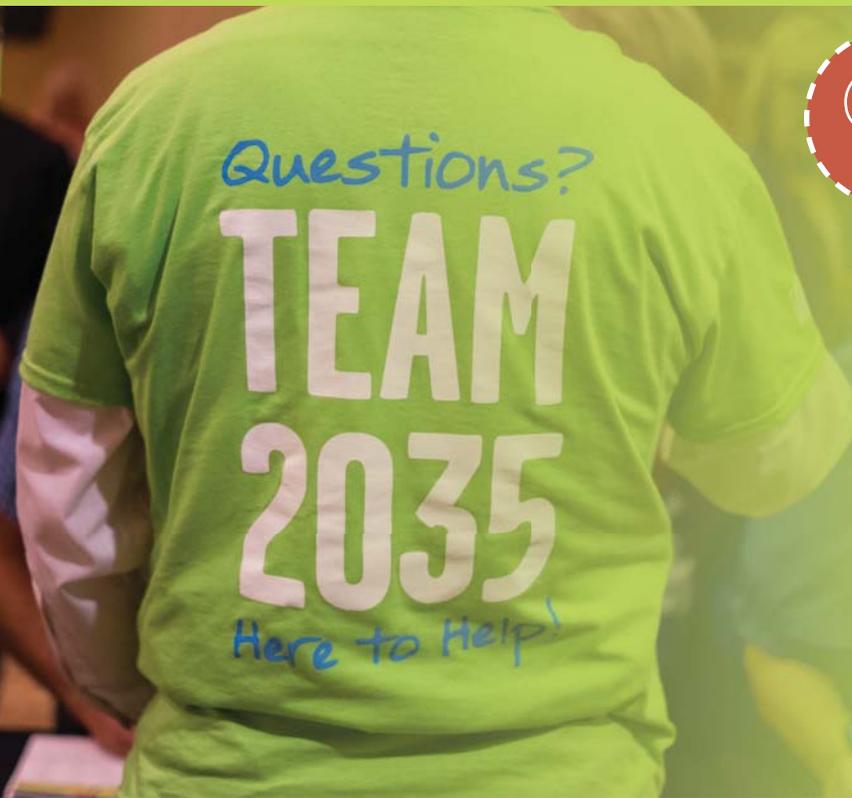
The outreach program was designed to increase awareness of the planning process, provide opportunities to offer input and ideas, and react to draft plan content and proposals. This approach helped to foster consensus and ensured that the final plan reflected community values and priorities, and is consistent with the goals and expectations of the City Council and Planning Commission.

Each component of the planning process - both online and offline - served distinct purposes. The offline strategies helped to build trust, one-on-one relationships, and a constituency of support that will ultimately be responsible for implementing the plan. The online strategies provided opportunities to engender greater understanding, forge deeper relationships, create larger networks, and interact in ways that are convenient for the participant - leading to more frequent and routine engagement.

## Outreach Events

- ▶ **Listening Sessions** were useful in identifying preliminary issues and opportunities at the beginning of plan development. Approximately 90 individuals representing a wide variety of community interests participated in small group discussions at the beginning of the process.
- ▶ **Comprehensive Plan Task Force Meetings** provided immediate feedback on the emerging plan content. Participants represented a diversity of community interests and areas of professional expertise, effectively serving as the "eyes and ears" of the community. The group met nine times in independent and joint workshop settings to engage in visioning, mapping, ranking, and discussion exercises.
- ▶ **Joint Workshops** were essential to broadening the planning conversation and building consensus among community leaders. At the beginning and end of the planning process, the City Council, Planning Commission, and Task Force met together to identify issues and needs, evaluate policies, and prioritize implementation strategies. A mid-point briefing also served as an interim check-in point to ensure consistency with the community's vision.
- ▶ **Community Workshops** were hosted at convenient times and locations geographically dispersed throughout the City to optimize public input. Three rounds of workshops were scheduled at the beginning, middle, and end of the planning process to obtain input and feedback at key project milestones.
- ▶ **Outreach Presentations** were given to six regularly scheduled community organization meetings to educate community

[ Continued on page 1.10 ]



WHAT ARE MURFREESBORO'S TOP ACCOMPLISHMENTS IN RECENT YEARS?

**"Murfreesboro continues to be one of the fastest growing cities in the nation while continuing to maintain a small town feel. Progress plus a community feel is hard to accomplish and we are doing just that!"**





[www.murfreesboro2035.com](http://www.murfreesboro2035.com)

### New Questions Posted - Join Now!

Murfreesboro citizens are encouraged to sign up for the Online Discussion Forum at [www.murfreesboro2035.com](http://www.murfreesboro2035.com) and this newsletter at [www.2035newsletter.com](http://www.2035newsletter.com) to stay informed about upcoming events and learn about ways to contribute to the process. New questions posted to the site include:

1. What is the one "game changer" in Murfreesboro that will define the City's future?
2. Murfreesboro is projected to grow to 200,000 residents in the next 20 years. **Opportunities or concerns?**
3. What are the **key growth areas** within the City of

### Questions

**Contact Team 2035**  
City Manager's Office  
boro2035@murfreesborotn.gov  
(615) 849-2629



**We Want You In the Game!**  
Watch this entertaining video clip on the comprehensive planning process [here](#).

The final result of the two-year

stakeholders on the plan development process, garner additional plan insights on specific topic areas, and encourage participants to attend plan-related meetings and workshops and engage with the online outreach tools.

- ▶ As the final step in the process, the project team led a **Leadership Training Workshop** with the City Council, Planning Commission, and City department heads to train them on plan implementation. The meeting was used to help define a first-year work program in conjunction with the annual budget, capital improvements program, and individual department work plans

circulated at up to 18 milestones throughout the project (e.g., project kick-off, chapter deliverables, meeting announcements, plan adoption). City staff translated these messages to other media platforms, such as LinkedIn and Twitter accounts.

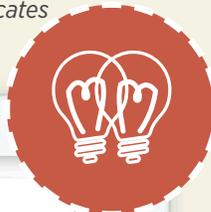
- ▶ The **Online Discussion Forum** helped to identify community needs and innovative approaches to improve Murfreesboro's prosperity and quality of life. This ongoing, "24/7" dialogue helped to guide the plan's findings and recommendations by soliciting input from citizens that do not typically attend or voice opinions at traditional public meetings. More than 1,500 citizens actively participated on the website (over 8,000 views). This forum also complemented other engagement activities by providing an outlet to continue ongoing conversations. The website was organized as a series of question prompts introduced over five months of the planning process.
- ▶ Near the conclusion of the comprehensive planning process, the project team developed a **Community Survey** to assist with priority-setting, using Survey Monkey to manage the distribution list, solicit input, and analyze survey results. The survey was written in plain language so it was accessible to all community members, succinct in length to encourage widespread participation, and carried over key plan principles to strengthen and support the overall planning efforts. The feedback directly influenced the direction of the draft Comprehensive Plan and was recorded as a series of infographics and summary bullets to be integrated into relevant plan sections.

[ Continued on page 1.12 ]

## Communication Strategies

- ▶ A **Project Newsletter** was used to disseminate project-related information to key stakeholders. It will be

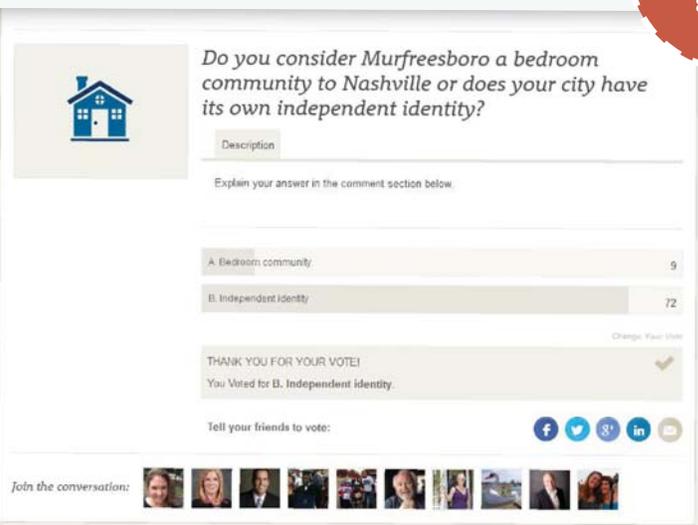
The lightbulb symbol displayed throughout this plan indicates the quote is from the Online Discussion Forum.



# 24/7 DIALOGUE

[www.murfreesboro2035.com](http://www.murfreesboro2035.com)

The Online Discussion Forum generated thoughtful responses that were integrated into the findings and recommendations of this plan.



**VISION STATEMENT**

**The City of Murfreesboro seeks sustainable growth that provides a vibrant economy, safety, affordability and upward mobility for all its citizens while preserving our values, heritage and environment.**

**MISSION STATEMENT**

Looking ahead to the Year 2035 and beyond, our vision is to manage growth in a manner that results in predictable development of exceptional quality, diverse professional, commercial and educational activity; achieve an efficient and compatible pattern of land use that sustains property values, encourages sustainability, and supports a blend of housing types for all stages of life and income levels; revitalize downtown as a true city center and community gathering place while preserving Murfreesboro's rich history and unique character; improve local and regional transportation efficiency and choices including increased opportunities for walking and bicycling; enhance safe and convenient access to parks and recreation facilities for citizens of all ages, to enable healthy and active lifestyles; protect valued open spaces and conserve natural resources, for the benefit and integrity of our environment, and community appearance; efficient use of community facilities and public infrastructure and their adequate provision concurrent with new development; and an attractive and well-maintained community for which we, the Citizens of Murfreesboro, are proud to call home.

# Community Profile

## Community Profile

When drafting public policy focused on improving the lives of people, decisions must rely on data that answer who these people are, where and how they live, and how their lives are changing. Demographic and related data that answer these questions are essential to policymakers and development planners across nearly every sector of society. Demographics provide a snapshot pertaining to the current statistical characteristics of a given population, such as its size, composition and spatial distribution, as well as the process through which populations change. Planners study demographic trends to determine historical changes in a population over time, in order to help fulfill the needs of their constituency and plan for change as accurately as possible. Information pertaining to the City of Murfreesboro as well as comparative communities is cited at the back of this chapter.

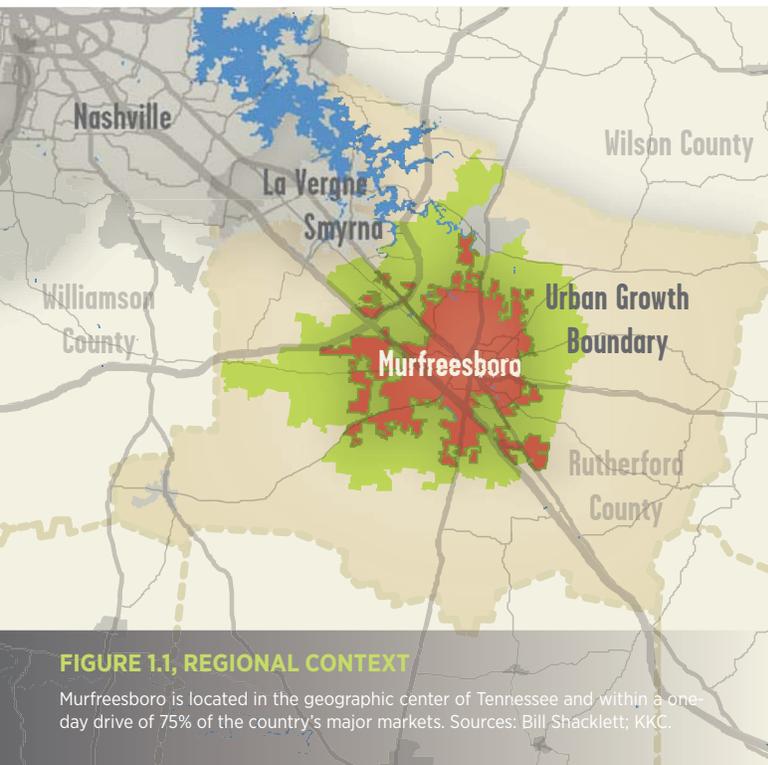
## Regional Context

The City of Murfreesboro is the county seat of Rutherford County, Tennessee. The estimated 2014 population is 115,999 according to the U.S. Census Bureau. In 2000, the population of the City was only 75,643 residents. Murfreesboro is Tennessee’s fastest growing major city and one of the fastest growing cities in the country. Murfreesboro is also home to Middle Tennessee State University (MTSU), the largest undergraduate university in the state of Tennessee, with total student population of 22,729 for the Fall 2014 semester.

Murfreesboro is approximately 33 miles from Nashville and is part of the Nashville-Davidson-Murfreesboro-Franklin, TN Metropolitan Statistical Area, which includes thirteen (13) counties and a population of approximately 1,757,912. While Nashville is at the center of Murfreesboro’s metropolitan region, Murfreesboro is far enough away from Nashville that the city is not a suburb. Approximately 71.1 percent of Murfreesboro residents are employed work in Rutherford County. As the county seat and largest city in Rutherford County, Murfreesboro provides services for the entire county.

## Physical Setting

The City of Murfreesboro is located within the center of the State of Tennessee and the unique physical geographic region referred to as the Central Basin. The center of the Central Basin is often referred to as the Inner Basin which has the flattest terrain for the entire geographic area. Throughout the area there are numerous karst limestone rock outcroppings, sinkholes, and depressions. The depth of topsoils in the area range from almost nonexistent to about ten (10) to twelve (12) feet and are variable in composition and characteristics. The areas within Murfreesboro that are or almost void of any topsoil provide for an environment of flora that is quite unique. Most of the best agricultural soils in the county are located in and around Murfreesboro. Murfreesboro and its surrounding areas are drained by the tributaries of the East and West Forks of the Stones River, including Lytle Creek, Sinking Creek, Bushman Creek, and Bear Branch.



**FIGURE 1.1, REGIONAL CONTEXT**

Murfreesboro is located in the geographic center of Tennessee and within a one-day drive of 75% of the country’s major markets. Sources: Bill Shacklett; KKC.

[ Continued on page 1.22 ]

## Our History<sup>1</sup>

### Murfreesboro celebrated its 200th Anniversary in 2011

In 1811, the Tennessee State Legislature established a county seat for Rutherford County. The town was first named “Cannonsburgh” in honor of Tennessee politician Newton Cannon, but was soon renamed “Murfreesboro” for Revolutionary War hero Colonel Hardy Murfree. As Tennessee grew westward, it became clear that having the state capital in Murfreesboro had begun as a mainly agricultural community, but by 1853 the area was home to several colleges and academies, earning it the nickname “Athens of Tennessee.” Despite the trauma of the Civil War, by the early 1900s its growth began to regain momentum, in contrast to large areas of the South.

In 1911, the state created Middle Tennessee State Normal School, a two-year school for training teachers. There was a subsequent merger with the Tennessee College for Women. In 1925 the school was expanded to a four-year institution. During and following World War

II, it grew and evolved to become Middle Tennessee State University in 1965. MTSU now has the highest undergraduate enrollment in the state.

World War II resulted in Murfreesboro beginning to move away from an agriculture-based economy and diversify economically with industry, manufacturing, and education contributing significantly. Since the end of World War II, growth has been steady giving rise to a stable economy. Murfreesboro has enjoyed substantial residential and commercial growth, with its population increasing 143% between 1990 and 2012, from 44,922 to 109,031. As it was determined that Knoxville would be a burden to those who had to travel from the western end of the state, in 1818, Murfreesboro became the capital of Tennessee until 1826, when Nashville became the state capital. On December 31, 1862, the Battle of Stones River, also called the Battle of Murfreesboro, was fought near Murfreesboro between the Union Army of the Cumberland and the Confederate Army of Tennessee. This was a major engagement of the American Civil War. Between December 31 and January 2, 1863, there were 23,515 casualties. It was one of the bloodiest battles of the war based on percentage of casualties. Stones River National Battlefield is now a historical site that brings in many tourists to Murfreesboro.

<sup>1</sup> City of Murfreesboro 2013-2014 Annual Budget



Cotton Days from 1929  
Source: Bill Shacklett



## Process for Selecting Comparison Communities

The communities on this page were used to document prevailing trends and characteristics that would potentially shed light on “best practices” for Murfreesboro. Each jurisdiction was selected based on the following criteria:

- ▶ Historic and projected population and growth rates;
- ▶ Demographic and socioeconomic composition;
- ▶ Major economic engines, such as educational and healthcare institutions;
- ▶ Comparable distance to major metropolitan areas; and
- ▶ Aspirational characteristics to culture, lifestyle, and image.

Although “apples” to “apples” comparisons do not exist, the method for selecting the comparison communities involved a rigorous vetting process through the Comprehensive Plan Task Force, Community Kickoff Workshop, and City staff inputs.

### MCKINNEY, TEXAS

- ▶ 40 miles to Dallas, TX
- ▶ Consistently recognized among the fastest growing cities in the US
- ▶ In *CNN's Money Magazine* (2012), McKinney was ranked 2nd place among Best Places to Live in the United States

### COLUMBIA, MISSOURI

- ▶ 124 miles to St. Louis, MO
- ▶ Distinct “college town” feel with University of Missouri (34,700 enrollment)
- ▶ Exact same population size as Murfreesboro
- ▶ Recognized by the Milken Institute as one of the “Top 10 Small Cities”



FIGURE 1.2, COMPARISON CITIES

# Regional and National Comparison Communities

## FLORENCE, ALABAMA

- ▶ 117 miles to Birmingham, AL
- ▶ 122 miles to Nashville, TN
- ▶ Small university city with a total of 40,000 residents and college enrollment of 7,200 students
- ▶ Vibrant downtown that merges into the University of North Alabama's campus

## ATHENS, GEORGIA

- ▶ 70 miles to Atlanta, GA
- ▶ Distinct "college town" feel with University of Georgia (34,500 enrollment)
- ▶ Progressive Southern community with vibrant arts and culture scene

## CHARLOTTESVILLE, VIRGINIA

- ▶ 72 miles to Richmond, VA
- ▶ Ranked by livability.com as #27 best place in the country to live
- ▶ Distinct "college town" feel with University of Virginia (21,200 enrollment)

## ASHEVILLE, NORTH CAROLINA

- ▶ 63 miles to Greenville, SC
- ▶ 130 miles to Charlotte, NC
- ▶ Known for outdoor culture and close proximity to Great Smoky Mountains and other national forests in the Southern Appalachians
- ▶ Largest city in Western North Carolina with 83,300 residents

## CARY, NORTH CAROLINA

- ▶ Reputation as a bedroom community to the "Research Triangle" metropolitan area
- ▶ Recognized as one of the fastest growing cities in the US and one of the safest cities in the US for low crime
- ▶ One-third of housing stock built within the last 15 years, similar to Murfreesboro

## GREENVILLE, SOUTH CAROLINA

- ▶ 100 miles to Charlotte, SC
- ▶ 150 miles to Atlanta, GA
- ▶ Bloomberg named Greenville the 3rd Strongest Job Market in 2010
- ▶ Forbes named Greenville the 13th Best City for Young Professionals
- ▶ Great American Main Street Award in 2003 and 2009



MURFREESBORO IS PROJECTED TO GROW TO 200,000 RESIDENTS IN THE NEXT 20 YEARS. OPPORTUNITIES OR CONCERNS?

“We need to improve incomes in order to grow the economy as fast as the population.”

## Income

Among the local comparison cities, Nashville has the highest expected median household income growth at 13.7% between 2014 and 2019.

Murfreesboro ranks eighth (8) out of the fifteen (15) cities researched nationally and the city ranks fifth (5th) out of seven (7) locally for 2014 median household incomes according to the U.S. Census Bureau. All of the cities studied both locally and nationally are expected to have substantial increases in their median household income between 2014 and 2019, however *Murfreesboro's household income growth is expected to be lower than all of the other comparison cities with the exception of Smyrna.* Murfreesboro's percentage of growth is expected to be only 9.9% and Smyrna's is expected to be only 9.6%.

New Murfreesboro Medical Clinic Three-Story Addition

Opened in 2013. Source: Murfreesboro Medical Center

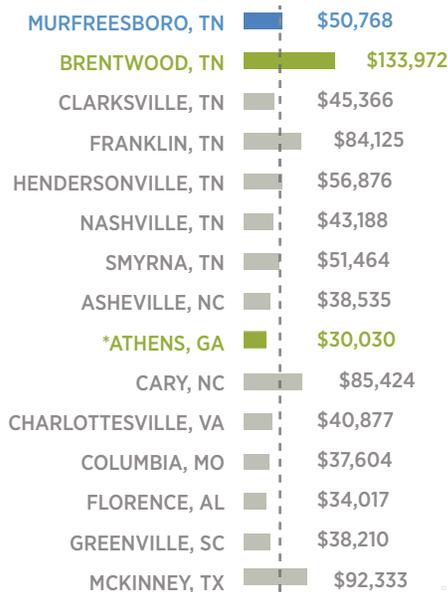


Amazon Fulfillment Center

Opened in 2012. Source: WGNS



FIGURE 1.3, MEDIAN HOUSEHOLD INCOME (2014)



The dashed line represents Murfreesboro's values.

The green bars represent high and low values.

\*Athens is part of a consolidated city-county government.

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2014 and 2019. ESRI converted Census 2000 data into 2010 geography.

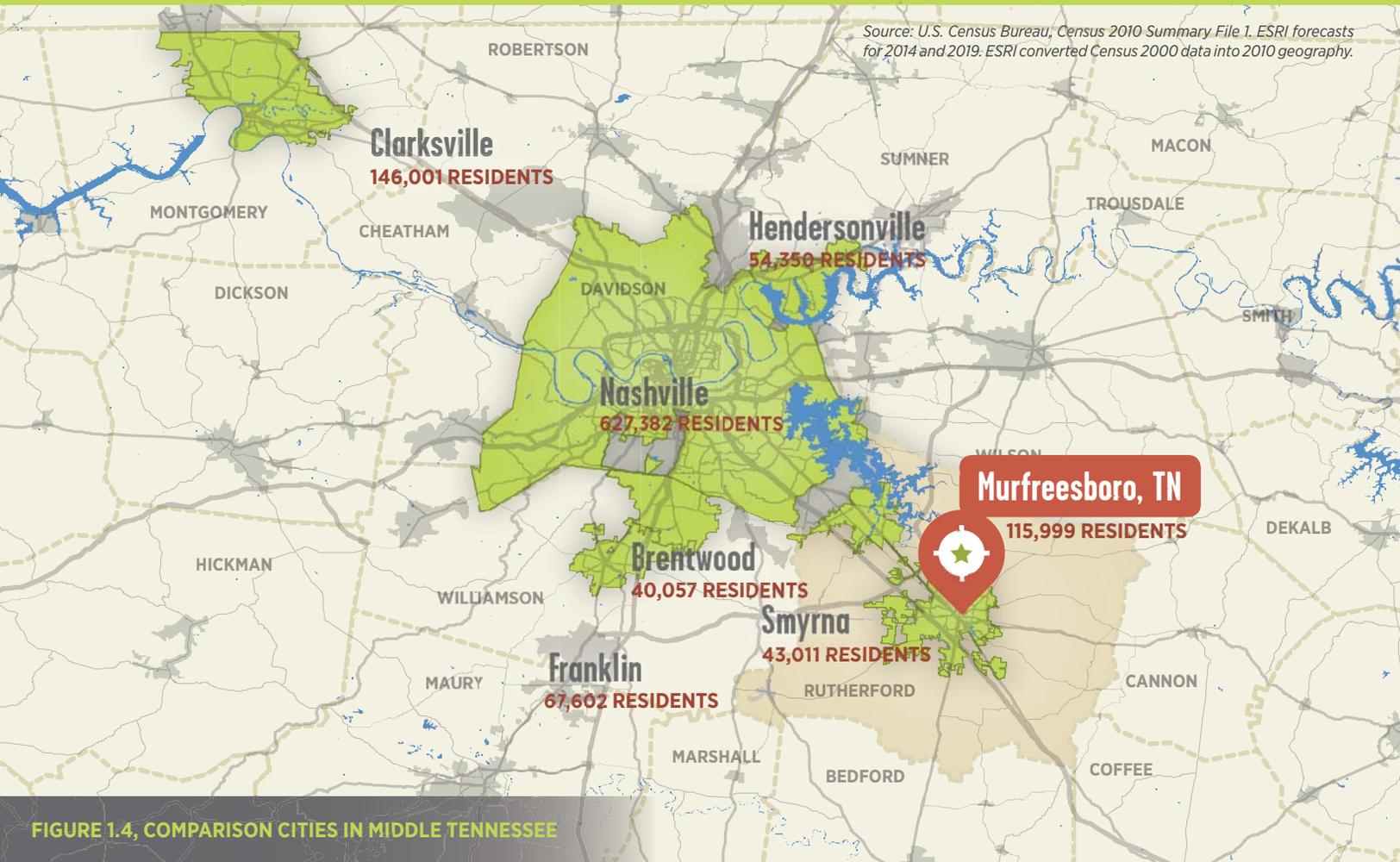


FIGURE 1.4, COMPARISON CITIES IN MIDDLE TENNESSEE

### Racial and Ethnic Diversity

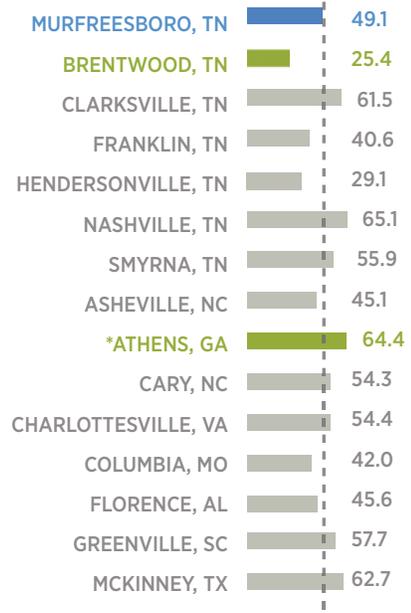
FIGURE 1.5, CITY RACE/ETHNICITY COMPOSITION (2014)



FIGURE 1.6, HISPANIC COMPOSITION (2014)



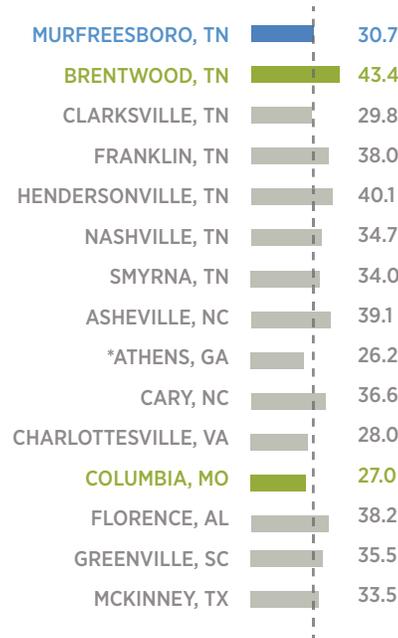
FIGURE 1.7, DIVERSITY INDEX (2014)



## Age of Residents

FIGURE 1.8, MEDIAN AGE (2014) [TO RIGHT]

Murfreesboro's population is relatively young and has a higher percentage of families than most comparison communities (33.5%). It also ranked 14th out of the 16 cities studied for projected growth among the senior population.

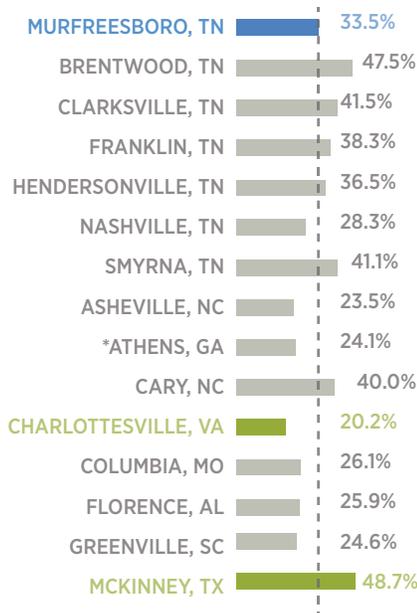


Between 2014 and 2019, Murfreesboro's median age is estimated to increase from 30.7 years to 32.1 years with a projected change of 4.4%.

As a reflection of Brentwood's high median age, it also has the highest median income (\$133,972) and the highest percentage of residents with bachelor's degrees (42.9%) compared to all comparison communities.

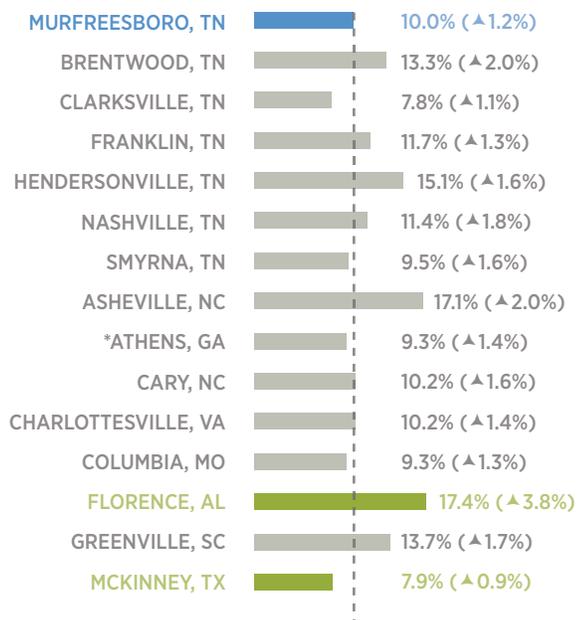
## Families

FIGURE 1.9, HOUSEHOLDS WITH CHILDREN (2014)



## Seniors

FIGURE 1.10, PERCENT OF POPULATION 65 YEARS OLD OR GREATER (2014) AND PROJECTED PERCENT INCREASE IN 2019



Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2014 and 2019. ESRI converted Census 2000 data into 2010 geography.

# Who Lives in Murfreesboro?

## Tapestry Segments

TABLE 1.2, TAPESTRY SEGMENTS (2014)

This table describes some of the unique socioeconomic qualities of the residents that live in Murfreesboro. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average. The following Tapestry segments have been included because they exceed the national average and begin to describe a general lifestyle found within Murfreesboro.

		City	US
1	<b>Up and Coming Families.</b> Up and Coming Families is a market in transition—residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead, and willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country.	19.7%	2.2%
2	<b>College Towns.</b> The college town is a unique type of urban place, shaped by the sometimes conflicting forces of youth, intellect, and idealism. Students have busy schedules, but make time between studying and part-time jobs for socializing and sports. Students that are new to managing their own finances tend to make impulse buys and splurge on the latest fashions. This digitally engaged group uses computers and cell phones for all aspects of life including shopping, school work, news, social media, and entertainment. College Towns are all about new experiences, and residents seek out variety and adventure in their lives.	12.4%	0.9%
3	<b>Set to Impress.</b> Set to Impress is depicted by medium to large multi-unit apartments with lower than average rents. These apartments are often nestled into neighborhoods with other businesses or single-family housing. Nearly one in three residents is 20 to 34 years old, and over half of the homes are non-family households. Although many residents live alone, they preserve close connections with their family. Income levels are low; many work in food service while they are attending college. This group is always looking for a deal. They are very conscious of their image and seek to bolster their status with the latest fashion. Set to Impress residents are tapped into popular music and the local music scene.	9.9%	1.4%
4	<b>Suburban Mothers.</b> Often referred to as “Soccer Moms,” Suburban Mothers is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.	7.9%	2.8%
5	<b>Bright Young Professionals.</b> Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. One out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.	7.2%	2.2%

Source: ESRI.

Middle Tennessee State University

Source: Ken Robinson



WHAT IS THE ONE "GAME CHANGER" IN MURFREESBORO THAT WILL DEFINE THE CITY'S FUTURE?

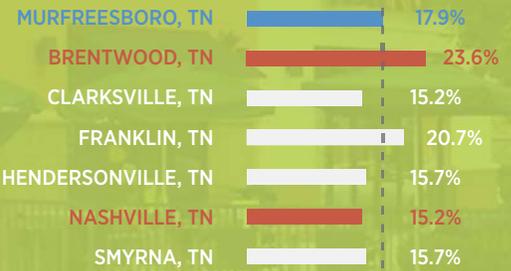
"Murfreesboro needs to bring in more attractions and entertainment to help with revenue to support the growth the city will see. With growth comes cost and to keep from raising taxes on it's citizens it would be helpful to have more attractive entertainment to attract visitors."



## Starbucks

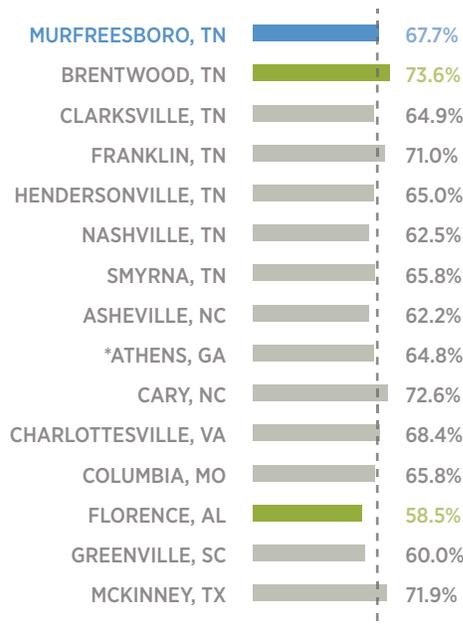
FIGURE 1.11, LIKELIHOOD SHOPPED AT STARBUCKS IN PAST 6 MONTHS (2014)

49 percent of Starbucks' customers are 25-40 year old urbanites with relatively high income, professional careers and a focus on social welfare. Young adults aged 18 to 24, total 40 percent of Starbucks' sales. Starbucks positions itself as a place college students can hang out, study, write term papers and meet people. (Houston Chronicle)



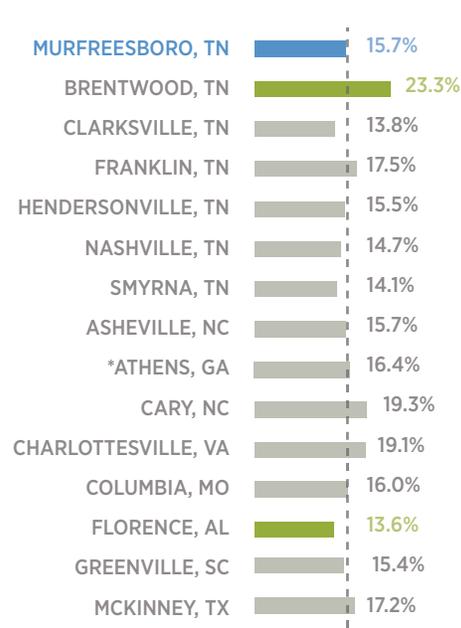
## Movie Attendance

FIGURE 1.12, LIKELIHOOD ATTENDED MOVIE IN THE PAST 6 MONTHS (2013)



## Museum Attendance

FIGURE 1.13, LIKELIHOOD ATTENDED MUSEUM IN THE PAST 12 MONTHS (2013)



Source: These data sets are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. ESRI forecasts for 2013 and 2018.

## CHAPTER 2 PREVIEW

# Growth Capacity and Infrastructure

The second chapter of the Comprehensive Plan defines the City's expected rate of growth and the public facilities and utilities infrastructure. This includes water, drainage, and wastewater programs required to accommodate facilities expansion and related improvements in a manner that is fiscally responsible, sustainable, and aligned with community planning objectives and priorities. The chapter will also include an analysis of existing public facilities to determine deficiencies and make recommendations for public improvements that will accommodate projected growth and development. A capital facilities analysis will be prepared as a separate report although the findings will be built into the body of Chapter 2, and will become the basis for planning goals and strategies.

## Community Input

### KEY CONSIDERATIONS

- ▶ **Annexation.** How will the State of Tennessee Annexation Bill HB 2371/SB2464 (enacted in April 2014), which limits the City's ability to annex property into the City limits without majority consent of applicable property owners, affect the community's growth? How and when should the City use incentives, such as infrastructure connections and other infrastructure services to encourage annexation?
- ▶ **Balanced Utility Infrastructure Investments.** How can the City continue to balance expansion of the system in new growth areas with ongoing investments and upgrades to older parts of the community (e.g., Downtown, historic neighborhoods)?
- ▶ **Community Definition.** How can future growth develop in a more compact and regular shape that is cost-efficiently served by the City's existing infrastructure systems and public safety providers?
- ▶ **Geographically Distributed Public Safety Services.** How can the City and County continue to expand the service areas of their police, fire and rescue, and emergency medical service functions in order to accommodate widespread growth patterns?
- ▶ **Coordinated Infrastructure Planning.** How can local and regional partners continue to strategically plan, coordinate, and cost share infrastructure systems so every public investment complements the anticipated intensity and pattern of projected growth?
- ▶ **Solid Waste and Recycling.** How can the City and County reduce, manage, and dispose of its solid waste in anticipation of the capacity limitations of its landfill in the next decade? As the City evaluates a recycling program, what levels of service should be provided and at what cost?
- ▶ **Water Resources Planning.** How can the City, Consolidated Utility District, and its regional partners improve water and wastewater resources planning at multiple scales, working toward a long-term transition to a net-zero water system?
- ▶ **Joint Use Facilities.** How can the City's drainage system translate to natural resource amenities, similar to the City's greenway system but at a neighborhood scale?
- ▶ **Technological Innovation.** With the formation of the City's first-ever Information Technology Department in 2010 - 2012 and adoption of an IT Master Plan, how can the City continue to improve its customer service and cost efficiency using technology?

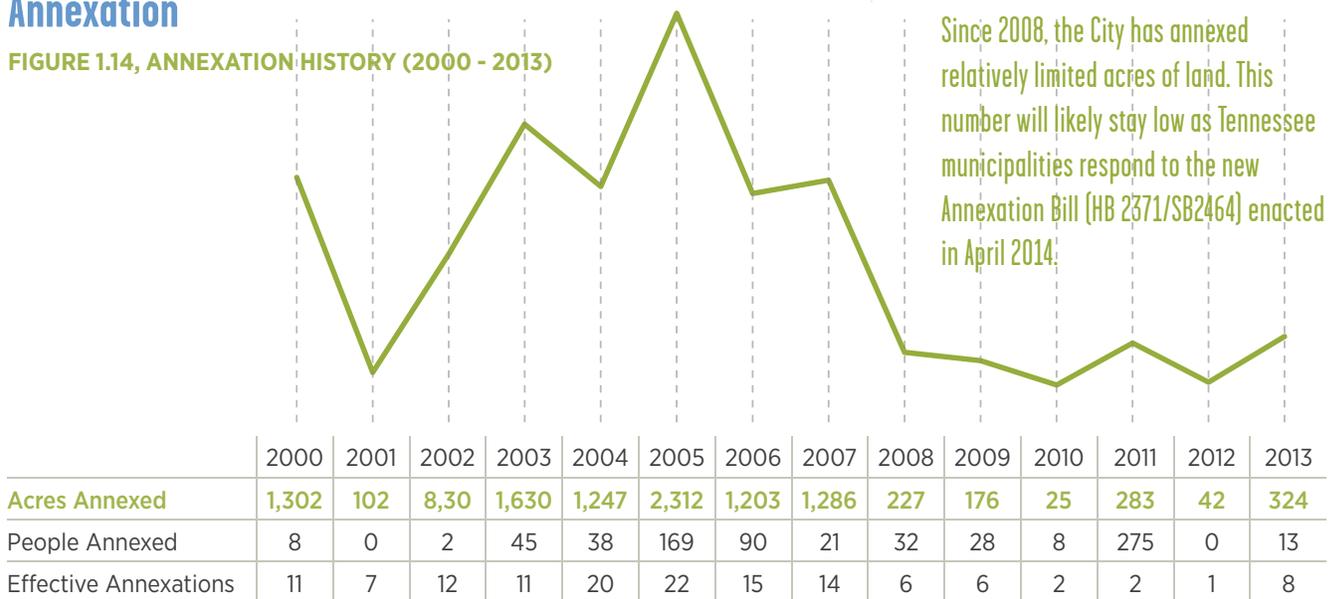
### RECENT MAJOR ACHIEVEMENTS

#### Water and Wastewater

- ▶ 2013 - Initiated a long-range, rate-funded water and sewer department capital purchases.
- ▶ Ongoing design and expansion to the Sinking Creek Wastewater Treatment Plant as required by new Tennessee Department of Environment and Conservation (TDEC) effluent water disposal requirements. Initially approved a \$67 million capital improvement plan consisting of a new regional pump station, force main, headworks building, and a wastewater plant capacity expansion.
- ▶ 2013 - The Water and Sewer Department began formulation of financial policies for both the water/sewer and stormwater funds. A Capital Improvement Plan (CIP) for the stormwater fund is placing new emphasis on physical improvements to the existing and future stormwater systems to meet the goals of improving quality of surface water and providing solutions to areas in need of improved or repaired infrastructure.
- ▶ 2013 - Water and Sewer Department selection and implementation of a new Customer Information System (CIS) to replace a nearly 40 year old COBOL system.

## Annexation

FIGURE 1.14, ANNEXATION HISTORY (2000 - 2013)



Source: City of Murfreesboro.

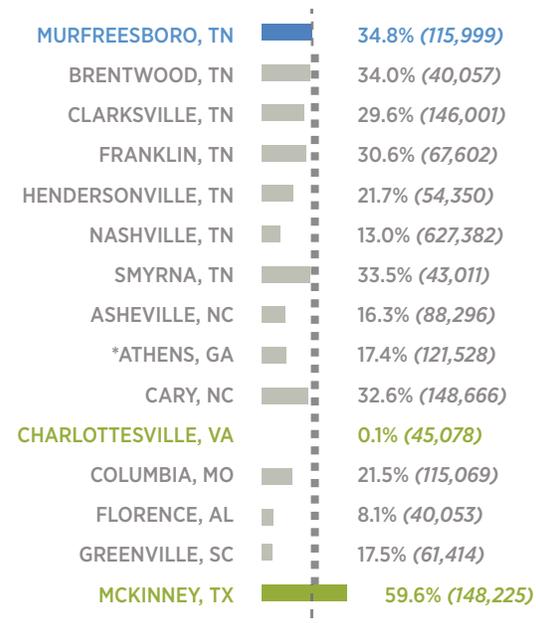
- ▶ 2013 - Adoption of an information technology master plan that provides a roadmap for the acquisition of computer hardware and software, including the replacement of the legacy system currently used for financial and human resources information systems. The goal of the department is to progressively increase rate funded capital budget combined with working capital funds to rehabilitate 2 percent or 60,700 feet of sewer lines of the system annually over a 50 year period. This is estimated to cost \$3 million per year. In order to achieve this goal, the department increases expenditures for sewer rehabilitation each year.
- ▶ The Stones River Water Treatment Plant is currently being expanded to 20 million gallons per day capacity. In addition to capacity, the most recent membrane technology and granular activated carbon filters have been added to the treatment process to meet present and future water quality regulations. Other additions include replacing gaseous chlorine for disinfection to on site chlorine generation, auxiliary emergency power and an additional 1 million gallon clear well. The membrane portion of the process was completed and placed into use, as well as other major components of the chemical feed systems.
- ▶ 2009 - The City continued to expand the use of wastewater effluent. Approximately 3 million gallons per day of the wastewater effluent is being recycled for beneficial use at the Old Fort Golf course, Siegel

[ Continued on page 1.24 ]

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2014 and 2019. ESRI converted Census 2000 data into 2010 geography.

## Population Change

FIGURE 1.15, POPULATION CHANGE (2000-2014) AND TOTAL POPULATION (2014)



Murfreesboro grew by more than 35,000 residents over the past 14 years, and it is expected to keep the fast pace in the near- and mid-term.



Soccer Complex, The Avenue retail center and in the landscaped median of Medical Center Parkway.

- ▶ 2007 – Continued construction of Phase III of Public Works facility, including new 8,540 SF solid waste building.
- ▶ FY 2006-2007 - The Water and Sewer Department began construction on the water plant process expansion; which was substantially complete and in operation in December, 2009. The facility is expected to be totally complete in early 2010. Management anticipates the addition of another head works building for primary screening and a Southwest Regional pumping station. These projects are currently under design.

### Drainage

- ▶ 2013 - Design for drainage improvements in the Mitchell Neilson neighborhood (in development).

### Solid Waste

- ▶ Ongoing replacement of automated side loaders in the Solid Waste Department, which improved reliability and reduced maintenance costs.

### Public Safety

- ▶ 2013 - The City purchased the former Murfreesboro Medical Clinic as a new Police Department headquarters since it had outgrown the current facilities and the detective division has been renting a large space on the south side of Murfreesboro. This \$4.7 million purchase will then require extensive remodeling for a final estimated cost of approximately \$40 million. With 125,000 square feet of usable space and approximately 400 parking spots on 8.5 acres, this building will be able to house all Police operations in one place and allow for long term growth of the department.
- ▶ 2012-2013 - Began the transition to new Police and Fire and Rescue radio communications system.
- ▶ 2012 - Renovations at the Fire and Rescue Department headquarters.
- ▶ 2008 - The City began using an automated traffic signal camera system on six intersections; which has resulted in 117,684 citations for red light violations (2008 to 2014).
- ▶ 2007-2008 Construction of Fire Station 10 on Veterans Parkway.
- ▶ 2007 – Integration of Gang Relational Intelligence Program (GRIP) software to increase intelligence on known gang members and their associates

- ▶ 2007 - Fire Department transitioned from Class 3 to Class 2 Insurance Services Office (ISO) rating.
- ▶ 2007 – Construction of the City’s new 19,325 SF Fleet Services Building and accessory amenities.
- ▶ 2006 – Formation of a Crime Suppression Unit to address crime, graffiti eradication, and neighborhood policing

### Information Technology

- ▶ 2012 - Recognizing the importance of technology and its effect on our future, the City of Murfreesboro formed its first Information Technology (IT) department. The plan is nearing completion and the first elements of it will begin to take shape in FY 2014.
- ▶ 2010 - With the development of the City’s new Information Technology Department, the first major project of this department will be to assist in the replacement of many of its software packages beginning with our General Ledger, Payroll and Human Resources Information System (HRIS), Fixed Assets and Court packages. We feel this software replacement package will give our employees the ability to work more efficiently and provide opportunities for better service delivery.
- ▶ 2009 - The City was struck by an EF-4 tornado on Good Friday that was 23-1/2 miles long and 1/2 mile wide at its widest point. The tornado resulted in two fatalities, 81 homes destroyed and resulted in over \$100 million in damages. City employees immediately responded and did an amazing job at helping the community respond and recover. The tornado was the defining event of 2009 and in the face of tragedy, it brought out the best in our community. The City incurred approximately \$3.6 million in additional costs, much of which was recovered through federal and state emergency management agencies.

## Population Outlook

Population projections are an important decision-making tool necessary to determine and quantify the potential pace and scale of the community’s physical growth. Projections reflect local, regional, and even national and international trends and offer a basis to prepare for the future. However, forecasting population changes can be challenging, particularly for the long term because it is often difficult to account for all circumstances that may arise. Therefore, it will be important for the City to monitor population and economic growth continually to account for both short- and longer-term shifts that can influence development activity and trends in the City and larger region.

[ Continued on page 1.26 ]

### *What does Compound Annual Growth Rate mean?*

Compound Annual Growth Rate (CAGR) refers to the rate at which a population will grow, if it grows at a steady rate. Similar to a bank account, the annual return is calculated based on each year's previous balances where each previous balance includes both the original principal and all interest accrued from prior years. The CAGR is an average year-on-year growth rate of an investment over a number of years. While investments usually do not grow at a constant rate, the compound annual return smoothes out returns by assuming constant growth.

Source: Ken Robinson

**TABLE 1.3, HISTORIC GROWTH IN THE CITY (1970 - 2013)**

Year	City	CAGR
1970	26,360	
1980	32,845	2.2%
1990	44,922	3.2%
2000	68,816	4.4%
2010	108,755	4.7%
2013	117,044	2.5%

**TABLE 1.4, HISTORIC PERCENTAGE OF UNINCORPORATED RESIDENTS IN RUTHERFORD COUNTY (1970 - 2008)**

Year	% Unincorporated Residents
1970	40.6%
1980	43.4%
1990	43.9%
2000	37.6%
2008	33.6%

**TABLE 1.5, HISTORIC SCHOOL ENROLLMENT FOR MURFREESBORO PUBLIC SCHOOLS (1989 - 2014)**

School Year	Student Enrollment	CAGR
1989-90	4,259	
1990-91	4,426	
1991-92	4,630	
1992-93	4,993	
1993-94	5,200	
1994-95	5,369	
1995-96	5,439	
1996-97	5,567	
1997-98	5,650	
1998-99	5,672	
1999-00	5,729	3.0%
2000-01	5,789	
2001-02	5,850	
2002-03	6,062	
2003-04	6,260	
2004-05	6,455	
2005-06	6,780	
2006-07	7,077	
2007-08	7,233	
2008-09	7,300	
2009-10	7,293	2.4%
2010-11	7,211	
2011-12	7,404	
2012-13	7,467	
2013-14	7,443	

Sources: U.S. Census Bureau, Rutherford County Comprehensive Plan, and Murfreesboro Public Schools, respectively.

Demographers caution that population projections become less reliable as the geographic area gets smaller, making city-level population the most difficult to forecast. This is because population change within a city is strongly influenced by less predictable factors such as housing prices, availability of vacant land to develop, and annexation of additional territory, which may already have existing residents and results in an instant increase in the city-wide total (as illustrated in Figure 1.14, *Annexation History*, on page 1.23).

**HOW WILL THE INFORMATION BE USED?**

Given this context, Figure 1.16, *Population Growth (1980 - 2040)*, provides a comparison of several scenarios for future population change in the City of Murfreesboro, Planning Area (which includes the City and Urban Growth Boundary combined), and Rutherford County. The projected population for Murfreesboro will serve as an important determinant in future decisions. The information will be used to:

- ▶ Quantify the demands on public facilities and services, such as fire and police protection, water and wastewater facilities, transportation and drainage infrastructure, parks and open space, and municipal buildings and staff, among other development impacts;
- ▶ Guide advanced planning for new development, coordinate timely provision of adequate infrastructure, and appropriately direct available resources;
- ▶ Create an economic development strategy to seize opportunities and overcome foreseen challenges; and
- ▶ Inform Rutherford County, the Nashville Area Metropolitan Planning Organization, and other regional agencies of changes and demands to local- and region-wide forecasts.

**PLANNING ASSUMPTIONS**

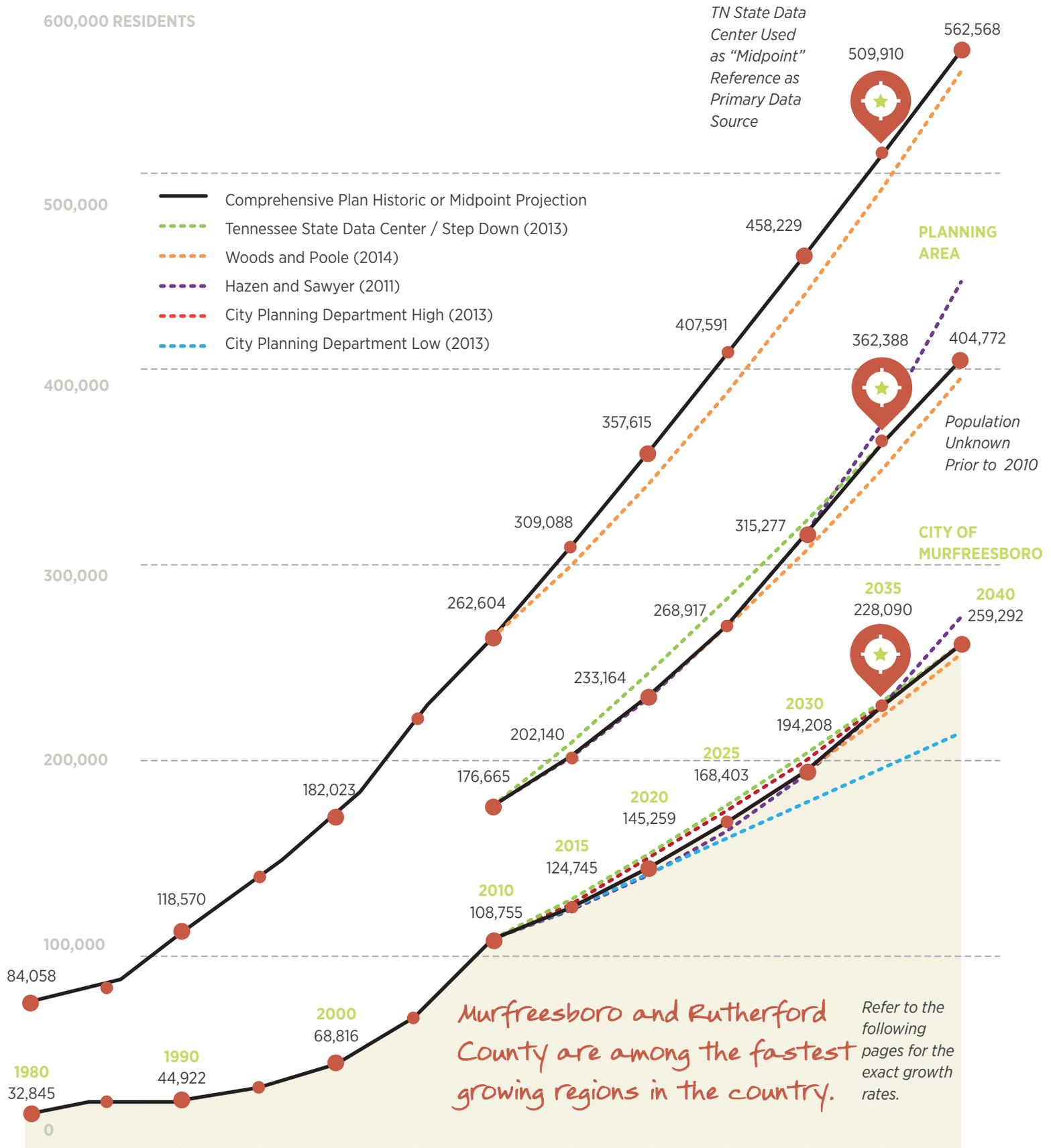
A number of assumptions were used to develop these scenarios:

- ▶ As the County seat and the largest jurisdiction within Rutherford County, the City of Murfreesboro’s population is expected to grow at a slightly faster pace than the County but following a similar growth curve. This assumption is based on historic data, which is clearly illustrated in Figure 1.16, *Population Growth (1980 - 2040)*.

[ Continued on page 1.28 ]

FIGURE 1.16, POPULATION GROWTH (1980 - 2040)

RUTHERFORD COUNTY



**TABLE 1.6, POPULATION PROJECTION INDICATORS**

Year	City Historical Population Growth	County Historical Population Growth	City					City Midpoint Projection
			City Hazen and Sawyer	City Planning Department (High)	City Woods and Poole Step Down	City Tenn. State Data Center Step Down	City Planning Department (Low)	
<b>Growth Rate Range</b>	2.5 - 4.7% CAGR	2.3 - 4.4% CAGR	2.2% - 2.7% CAGR	2.2% - 3.5% CAGR	2.7 - 3.1% CAGR	2.4% - 3.4% CAGR	1.6% - 2.7% CAGR	<b>3.0% CAGR</b> (2015 - 2040)
<b>Cumulative Annual Growth Rate</b>	<b>4.3% CAGR</b> (1990 - 2013)	<b>3.8% CAGR</b> (1990 - 2013)	<b>3.2% CAGR</b> (2015 - 2040)	<b>2.9% CAGR</b> (2015 - 2040)	<b>2.9% CAGR</b> (2015 - 2040)	<b>2.8% CAGR</b> (2015 - 2040)	<b>2.2% CAGR</b> (2015 - 2040)	
<b>Source Date</b>	2013	2013	2011	2013	2014	2013	2013	2014

- ▶ The City will continue to become an increasing percentage of the County. Figure 1.4, *Comparison Cities in Middle Tennessee*, shows the increasing degree of urbanization across Rutherford County. This trend is consistent across the country as citizens migrate to suburban and urban areas for greater educational and employment opportunities. In 2010, the City represented 41.4 percent of the County population. This value is expected to gradually increase to 46.1 percent by 2040.
- ▶ It is estimated that 67,910 residents are located in the City of Murfreesboro's UGB. The Hazen and Sawyer Study (2011) identified a population of 67,910 in the Total Service Area (not including the City population). Based on the similarity between the sewer district boundaries and the City's UGB - as well as the general lack of urbanization in these fringe areas - it was assumed this figure also represented the UGB population in 2010.
- ▶ Growth inside and surrounding the city limits will occur based on market supply and demand. Annexations are policy decisions that determine whether this growth occurs within the city limits or at its periphery in the UGB. Looking at historic data in Figure 1.14, *Annexation History*, the City's annexation history will not play a significant factor in annexations involving already populated areas, which immediately add new residents to a municipal jurisdiction. Over a 13-year period, the maximum number of residents the City absorbed in one year was 275 residents.

The City and County projections build on the latest decennial Census figure of 108,755 persons for 2010, and identify potential population levels out to 2040. Table 1.3, *Historic Growth in the City, 1970-2013*, also provides historical perspective since 1970. It is notable that Murfreesboro added nearly 40,000 residents during the 2000s, which ended with the severe economic downturn years of 2007-2010 across the nation. While many communities saw the departure of individuals and families who needed to relocate for employment or better opportunities, Middle Tennessee welcomed many of these transients and thrived economically during this period.

The historical portion of the Figure 1.16 chart, for the previous Census years of 1970 through 2010, includes decades when Murfreesboro experienced tremendous growth leading up to the present day. It also encompasses the most recent decade of the 2000s, in which Murfreesboro saw a 4.7 percent compound annual growth rate (CAGR) in population - the highest rate since 1970 when suburbanization had emerged as a dominant pattern in the region and nation.

**SOURCES OF INFORMATION**

Multiple sources were used to determine the midpoint projections for the City, Planning Area, and Rutherford County:

**Tennessee State Data Center.** The Tennessee State Data Center (TSDC) provides 50-year County population projections that are updated on an annual basis. TSDC projected a 2.8 percent CAGR between 2015 and 2040 for

Planning Area (City + Urban Growth Boundary)				County	
PA Hazen and Sawyer	PA Tenn. State Data Center Step Down	PA Woods and Poole Step Down	PA Midpoint Projection	County Woods and Poole	County Tenn. State Data Center
2.0 - 3.6% CAGR	2.2 - 3.4% CAGR	2.5 - 2.9% CAGR	<b>2.8% CAGR</b> (2015 - 2040)	2.3 - 2.7% CAGR	2.0% - 3.3% CAGR
<b>3.2% CAGR</b> (2015 - 2040)	<b>2.7% CAGR</b> (2015 - 2040)	<b>2.7% CAGR</b> (2015 - 2040)		<b>2.5% CAGR</b> (2015 - 2040)	<b>2.4% CAGR</b> (2015 - 2040)
2011	2013	2014	2014	2014	2013

**Compound Annual Growth Rate (CAGR) represents the annual rate at which the City, Planning Area, and/or County has grown or is projected to grow over a designated period. It is a useful metric for comparing across different jurisdictions and for short- and long-range growth periods.**

Rutherford County. The step-down method was applied to calculate Murfreesboro’s growth rate. Essentially, this method relies on a proportional relationship with Rutherford County, assuming a gradual increasing percentage of the County population as reflected by historic rates. The step-down method indicates growth will remain high at 3.4 percent CAGR over the next two decades and then taper to 2.4 percent CAGR by 2040.

**Woods and Poole (2014).** The Nashville Area Metropolitan Planning Organization (NAMPO) and Rutherford County use Woods and Poole County data sets to establish projections for transportation planning purposes. NAMPO is currently inputting 2014 data into its 2040 Regional Transportation Plan, which is planned for public release at the end of 2015. Similar to the TSDC data set, the step-down method was applied to identify Murfreesboro’s growth rates. This indicator shows that Murfreesboro is at a faster growth period that will slow to 2.7 percent CAGR by 2040.

**Hazen and Sawyer (2011).** This data was obtained based on the population within the City of Murfreesboro’s sewer districts boundaries. The information was used to inform the *Wastewater Treatment Capacity and Effluent Disposal Study* in 2011. This count is the most granular level of information collected based on individual district populations. Unlike the TSDC and Woods and Poole projections, this study anticipated growth rates would increase, meaning the CAGR will be 2.8 percent between 2015-2020 and 3.7 percent between 2035 to 2040.

**City Planning Department High and Low (2013).** The City Planning Department conducted an informal study to create eight different population projection scenarios based on constant rates of new dwelling units and, alternatively, constant annual growth rates. Staff identified a low scenario based on an average of 1,500 dwelling units over the next 25 years, resulting in a 2.2 percent CAGR between 2015 – 2040. This was the lowest projection scenario illustrated in the figure. Alternatively, the high scenario represented 2,000 to 2,600 new dwelling units per year and was fairly consistent with the other projection scenarios, indicating a 2015 – 2040 CAGR of 2.9 percent.

**CONCLUSIONS**

**The midpoint 2035 population forecasts of 228,090 City residents and 362,388 Planning Area residents have been selected for future planning purposes.** A specific person within the City should be assigned the responsibility of monitoring on an annual basis activities associated with the region’s growth. Reports should be made to the Mayor and City Council as new trends start to become apparent and changes in policy or budgeting is warranted.

[ Continued on page 1.30 ]

## CHAPTER 3 PREVIEW

## Mobility

The third chapter of the Comprehensive Plan focuses on the orderly development of the community's multi-modal transportation system. It closely ties into growth and infrastructure planning and future land use planning to evaluate the impacts of different transportation investment decisions on future development and community character. The section includes updates to the City's Major Thoroughfare Plan, which corresponds with community character objectives and transportation initiatives of other regional entities, such as Rutherford County, Nashville Area Metropolitan Planning Organization (NAMPO), Nashville Metropolitan Transit Authority (NMTA), Regional Transportation Authority (RTA), Tennessee Department of Transportation (TDOT), etc. This effort will include an evaluation of traffic safety, capacity, level of service (LOS), continuity, and connectivity of the existing and planned corridors. Analysis and recommendations also focus on "complete streets," which address pedestrian and bicycle circulation and safety; existing and future public transportation needs (ROVER, partnerships with the NMTA and RTA); and freight movement in and throughout the community (including truck traffic and railroad corridors).

## Community Input

### KEY CONSIDERATIONS

- ▶ **Streetscape Improvements.** Where and in what sequence should the City extend streetscape improvements (e.g., sidewalks, lighting, banners, signage, outdoor furniture) to other commercial and mixed-use nodes, similar to recent investments in Maney Avenue and the Gateway project?
- ▶ **Corridor and Entranceway Appearance.** How can the community improve the appearance of major roadway corridors (arterials and collectors), particularly at its signature community entranceways and district gateways such as the new bridge project at Highway 96 and US 41, through public investments, public-private partnerships, regulatory controls, and multi-jurisdictional coordination?
- ▶ **Outdated Road Infrastructure.** What financing tools are available to incrementally update the local road network to meet the needs of all neighborhoods and neighborhood commercial centers, despite the City's large and spread-out service area?
- ▶ **Metro Transit.** How can Murfreesboro improve regional mass transit connectivity to Nashville and surrounding jurisdictions?
- ▶ **Increased Pedestrianization and Bicycle Use.** How can the community expand the City's sidewalk and bicycle networks to increase the percentage of residents that benefit from and use them. These improvements would include elements such as continual investment in the Stones River Greenway System trail network (Stones River and Lytle Creek areas), on-street bike network, neighborhood sidewalks, etc. How will these systems benefit from new interior connections, accessibility modernizations, and extensions into future developments?
- ▶ **Cross-Town Congestion.** How can the City, Rutherford County, and TDOT continue to systematically improve the arterial and collector road network to efficiently convey traffic within and through the community, especially near major traffic generators?
- ▶ **Traffic Barriers.** What tools are available to mitigate traffic barriers and associated nuisances (e.g., construction zones especially long-term road projects, railroad crossings, school zones, cut-through traffic) that negatively impact residents, business owners, and visitors?

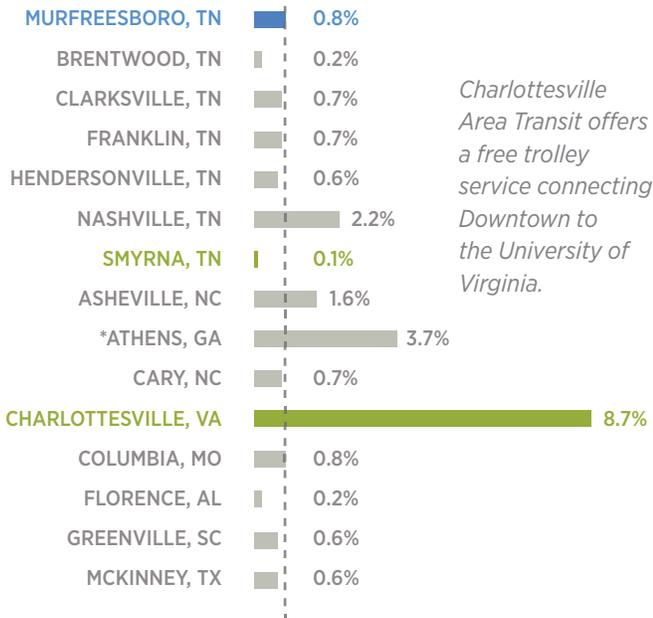
### RECENT MAJOR ACHIEVEMENTS

- ▶ 2014- 2016 - The improvements to Middle Tennessee Boulevard between Main Street and Greenland Drive will be entering the construction phase. Approximately \$11 million is budgeted for construction, comprised of Federal transportation funding along with matching funding from Middle Tennessee State University, the City of Murfreesboro and utility companies.
- ▶ 2013 - The City's Street Department returned to Engineering Department. The street signage and pavement marking function of the previous Street Department is transferred to the Transportation Department.
- ▶ 2013 - FY 2014 Budget allocated an additional \$2 million for repaving City streets using State gasoline taxes; a 7.5% budget increase from FY 2013.
- ▶ 2013 - Began retrofitting traffic signals from incandescent bulbs to LEDs. Recycled asphalt is included in the repaving program to extend the number of miles of streets completed annually.

[ Continued on page 1.33 ]

## Public Transportation

FIGURE 1.17, RESIDENTS THAT TAKE PUBLIC TRANSPORTATION TO WORK (2012)



Source: U.S. Census Bureau, 2008-2012 American Community Survey.

## Commuting

Of the seven cities studied locally Murfreesboro has the longest commute time to and from work.

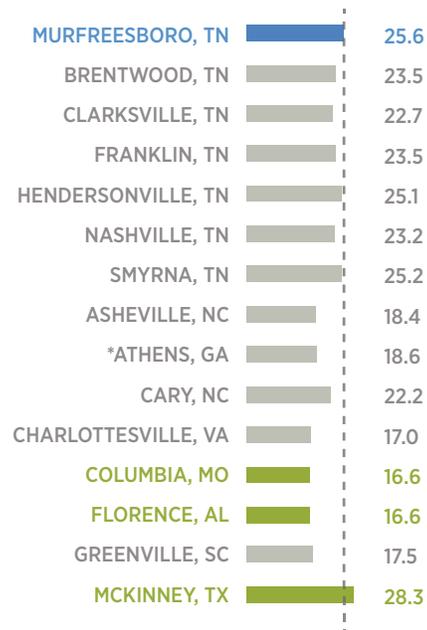
The average citizen of Murfreesboro must drive 25.6 minutes to get to work. This is the highest amount of time for the local Tennessee cities studied and the second highest commute time for all cities in the study. Without reviewing any of the other data here, one could rationalize that this is because Murfreesboro is a long distance to Nashville and people must be commuting to the state's capitol city. However, with the high percentage of workers who work within Rutherford County (shown above) and the low percentage of home based workers, one is lead to believe that solutions to the long commute problem can be found within the city limits.

WHAT IS THE ONE "GAME CHANGER" IN MURFREESBORO THAT WILL DEFINE THE CITY'S FUTURE?



"Regional mass transit - Murfreesboro city residents and leaders have virtually no control over this 'game changing' development. But few things would have as widespread, positive impact on our city as the development of a comprehensive, convenient mass transit option to Nashville..."

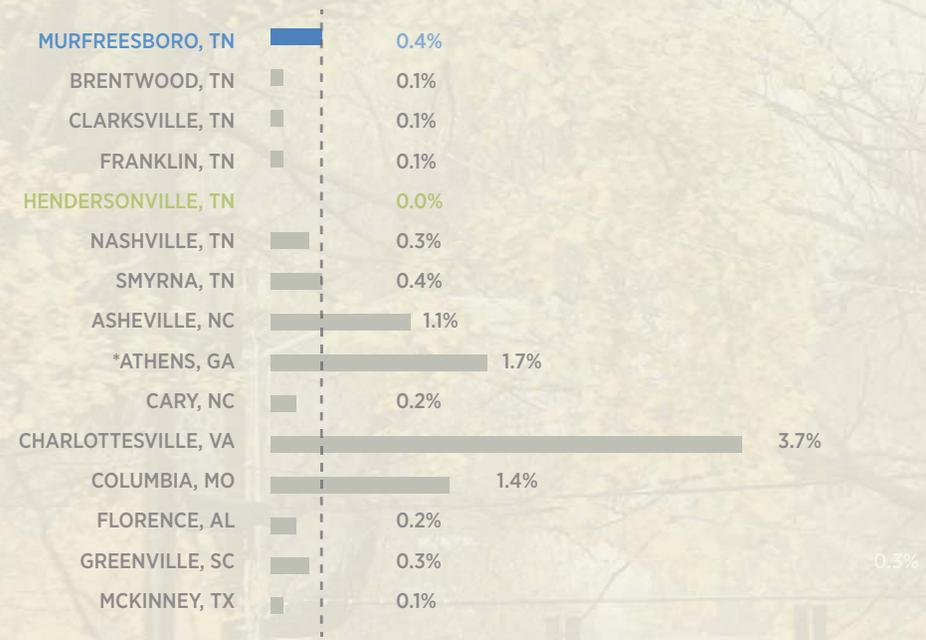
FIGURE 1.18, MEDIAN COMMUTE TIME TO WORK IN MINUTES



*McKinney is a 40 mile commute to the City of Dallas and is consistently one of the fastest growing cities in the country.*

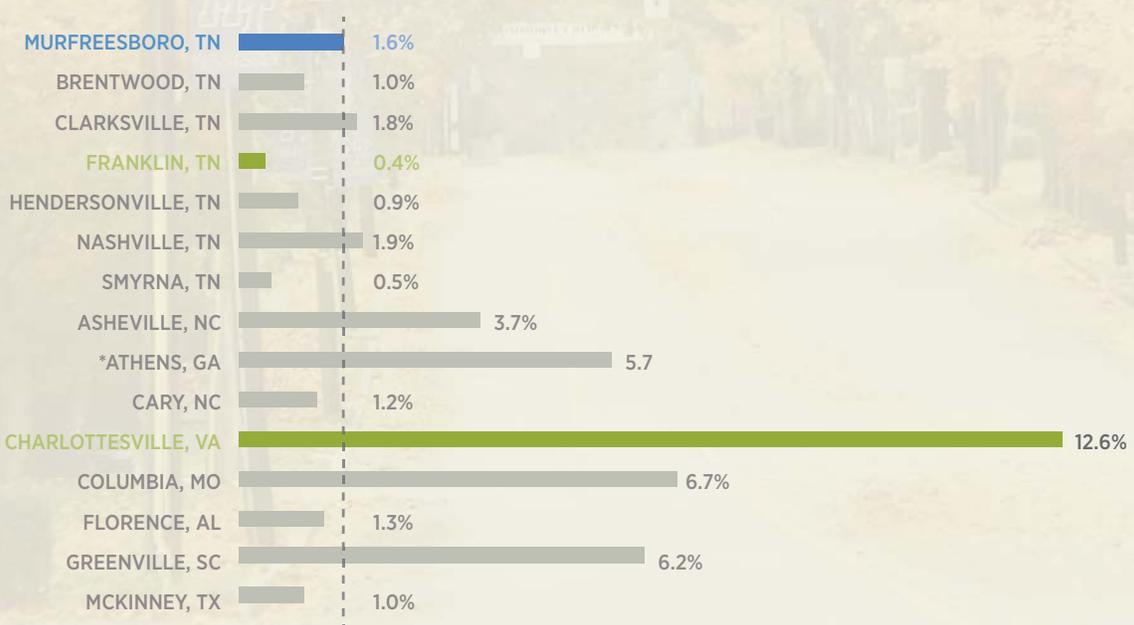
## Bicycle Riding

FIGURE 1.19, RESIDENTS THAT RIDE BICYCLES TO WORK (2012)



## Walking

FIGURE 1.20, RESIDENTS THAT WALK TO WORK (2012)



Source: U.S. Census Bureau, 2008-2012 American Community Survey.

- ▶ 2013 - The City's public transportation system, Rover, saw the addition of an entire new fleet of buses. The savings from maintenance alone with the new fleet is over \$100,000 per year. Additionally, planning and site location for a Transit Facility is under way. Architects are completing preliminary plans for a building to be located on West Main Street. Construction is scheduled to begin in late 2016. Both of these projects utilize Federal transit funding (83 percent for the bus fleet; and 80 percent for the Transit Facility) with the City and state providing any required match.
- ▶ 2013 - Murfreesboro Municipal Airport (MBT) was approved for a runway extension of nearly 1,000 feet. This extension will improve the safety margins for business class aircraft to use MBT, the most convenient airfield to Murfreesboro and Middle Tennessee State University. MTSU will be able to maintain and potentially expand the type of flight instruction offered to its students.
- ▶ 2013 - The City worked with the State of Tennessee to: 1) widen Bradyville Pike (SR 99); widen Thompson Lane (SR 268) from Memorial Boulevard to NW Broad Street; and 3) to extend Cherry Lane to connect Memorial Blvd. to NW Broad Street, and construct an interchange at SR 840.
- ▶ 2013-2015 - Phase 2 of the Joe B. Jackson Parkway is underway at a cost \$9.4 million. This road is important to help form the loop from SR 840 to Interstate 24 to ease inter-city traffic congestion.
- ▶ 2013 - 2015 - The final phase of Veterans Parkway, linking State Route 840 to South Church Street (US-231) is well underway. This \$7.6 million project completes the loop and is scheduled for completion in December 2015.
- ▶ 2012 - Funded by the ARRA grants the Transportation Department constructs bus shelters and employs ITS/GPS systems for the City's fleet of buses.
- ▶ 2011 - realignment of the Manson Pike/Gresham Lane and Fortress Boulevard. This project was finalized in April 2012 at a cost of \$6.3 million, and eliminated several confusing intersections and improved connections from I-24 to the northwest side of Murfreesboro.
- ▶ 2010 - As part of the American Recovery and Reinvestment Act (ARRA), the Transportation Department completed the resurfacing of Thompson Lane and an upgrade and expansion of Murfreesboro's integrated traffic signal system.
- ▶ 2010-2012 - Completion of Maney Avenue. The upgrade to South Maney Avenue was substantially complete by June 30, 2012. The project included new and larger storm drainage system, landscaping at the levels of the Gateway District, decorative lighting and street furniture and pervious brick pavers for the parking areas. Final cost is expected to be approximately \$4.5 million.
- ▶ 2008 - The City continued its aggressive road building and widening program. Projects completed included the Rutherford Boulevard bridge over the CSX Railroad; Middle Tennessee Boulevard, between Main Street and Broad Street; landscaping of Medical Center Parkway; and Conference Center Boulevard. Projects under construction include Dejarnette Lane, Rutherford Boulevard at Greenland Drive, Greenland Drive, Veteran's Parkway Phase I, Robert Rose Extension, Pitts Lane, Old Lascassas Road, Battleground Drive, Florence Road, Rutherford Boulevard at Broad Street, AgriPark Drive, and River Rock Boulevard. The City also partnered with Rutherford County to reconstruct Halls Hill Pike. In addition, the West Main Convenience center was expanded.
- ▶ 2007 - Airport named "Tennessee Airport of the Year." 43 new T-Hangars were constructed, nearly doubling total number of hangars.
- ▶ 2007 - Expansion of the taxiway "C" / ramp connection and construction of an aircraft wash area
- ▶ 2007 - City launched Rover system, grew from 6 routes to 8 routes.
- ▶ 2007 - City received a \$116,283 Tennessee Roadscapes Grant for landscape installation for the Middle Tennessee Boulevard Improvements.

[ Continued on page 1.36 ]



# Chapter 1

COMP PLAN TASK FORCE DRAFT 12.01.2014



Source: Ken Robinson

New \$267 million St. Thomas Rutherford Hospital  
 Source: Ken Robinson



**WHAT ARE THE KEY GROWTH AREAS WITHIN THE CITY OF MURFREESBORO?**

“Thompson Lane and Medical Center Parkway is a booming area and it will only get bigger. It would be really nice if we could spread the businesses out over the city and not cluster them in one area. Another area is Hwy 99, the road expansion hasn't even begun and the houses being built is causing more and more traffic. Hwy 99 can hardly handle the flow of traffic now in the peak times of the day.”



## CHAPTER 4 PREVIEW

# Land Use and Character

The fourth chapter of the Comprehensive Plan assesses Murfreesboro's long-range development outlook and establishes the necessary policy guidance for making decisions about the compatibility and appropriateness of individual developments - and proposed redevelopment and infill projects - within the context of Murfreesboro and its urban growth boundary. The Future Land Use Map illustrates the City's policy for directing ongoing development and managing future growth, preserving valuable land, and protecting the integrity of neighborhoods by denoting the type, pattern and character of future development (rather than its use and density only). This strategy aligns with community growth, planned expansion of utilities and transportation infrastructure, and other public facilities plans. Additionally, this section suggests potential development code adjustments and other action strategies to protect and enhance Murfreesboro's connectivity, functionality, and appearance.

## Community Input

### KEY CONSIDERATIONS

**Life-Cycle Amenities.** How can the community expand its amenities (e.g., housing, entertainment, recreation, culture) and services to recruit new residents and retain existing ones, including targeted groups such as MTSU students transitioning to their first jobs, young workers and professionals, and seniors?

**Developer-Friendly Development Climate.** How can the City provide more communication and coordination mechanisms to streamline the process and help developers navigate development review requirements?

**Development Guidelines and Regulations.** What updates are needed to the City's land development regulations, design standards, ordinances, and other tools to ensure new development and redevelopment projects are compatible with the existing and preferred character of the community?

**Downtown Revitalization.** How can the community increase the level of foot traffic, nighttime entertainment, private investment in Downtown, and more housing options.

**Commercial and Residential Infill.** How can the City promote development of vacant lots and/or adaptive re-use of vacant or substandard buildings and properties, especially in concentrated areas in the community's mature neighborhoods and corridors?

**Murfreesboro's Historic Character.** How can the City leverage and potentially expand its local historic district to preserve its core fabric (e.g., buildings, landmarks, Downtown), while at the same time, taking into account the impacts on affordability?

**Quality Small and Large Retail Opportunities.** How can the City balance small boutique and niche businesses that reinforce Murfreesboro's unique identity, while simultaneously attracting regional shopping centers that significantly increase the City's tax base?

### RECENT MAJOR ACHIEVEMENTS

- ▶ 2013 - The Gateway Project Fund was established to record the development of an area of land purchased by the City to bring new jobs and companies to our area. This has been an overwhelming success as the City has a new hospital and many new medical facilities in the district. Both retail and office developments have located in this area, as well as new concepts of mixed retail and living space. The City still has land for sale in this area and is recruiting corporate headquarter projects to these parcels.
- ▶ Through November 2013 - 650 new single family building permits were issued. This compares to the calendar year 2009 low of 345 single family permits for the entire year. Total new construction value in 2009 was \$206 million, compared to the November 2013 valuation of \$331 million.
- ▶ 2013 - Similar growth in commercial construction, school enrollment and utility customers confirm that growth has returned to Murfreesboro.
- ▶ 2012 - Zoning study of the Maney Avenue area was commenced.
- ▶ 2012 - Installing Phase II of the Historic Downtown landscape revitalization project.
- ▶ 2012 - A major apartment development was approved for construction in the Gateway District on Robert Rose Drive. The project includes over 400 housing units, an on-site restaurant and other upscale amenities. The project is expected to exceed \$35 million in capital investment.
- ▶ 2008 - \$45 million upgrade to Stone's River Mall.
- ▶ 2007 - The Avenue, 811,000 square foot shopping center with total development cost of \$150 million.

► 1998 - The leadership of Murfreesboro saw an opportunity to spur development with the construction of a connector street (Medical Center Parkway) and the purchase of real estate to create new retail, hospitality, medical and office development along the new northern entrance corridor from Interstate-24 to the center of Murfreesboro. Known as the Gateway District, the project has proven to be a resounding success. Using 2009 property tax assessments, \$132,576,600 in private investment stemming from the City’s Gateway Initiative has taken place. Developments include The Avenue retail area, Middle Tennessee Medical Center’s medical office building, the Stonegate office development, The Oaks retail center and the Murfreesboro Medical Clinic in addition to over 60 smaller projects. These totals do not include the non-taxable investment of the new Middle Tennessee Medical Center (valued at \$256 million) or the 283 room Embassy Suite and its attached 80,000 square feet of convention space (covered by an In-Lieu-of Tax agreement).

[ Continued on page 1.40 ]



**MURFREESBORO IS PROJECTED TO GROW TO 200,000 RESIDENTS IN THE NEXT 20 YEARS. OPPORTUNITIES OR CONCERNS?**

“Not losing sight of older spaces. As the city has grown west, the interior has begun to decline and that needs to be addressed or those of us who choose stay on the east side of I24 will be surrounded by Check into Cash places like the ones growing up around the corner of Northfield and Memorial.”



**KLEER-VU LUNCHROOM**

This diner is a fixture in the community and is located on Highland Avenue near Downtown.

## Development Activity

TABLE 1.7, PLANNING DEPARTMENT REVIEW ACTIVITY (2000 - 2013)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Preliminary Plats	39	35	49	48	78	67	57	35	21	3	5	13	26	55
Preliminary Lots	917	912	1666	1643	2594	2433	2123	1493	229	24	95	161	311	961
Final Plats	128	109	108	111	128	152	128	180	110	54	29	55	62	88
Final Lots	931	1302	1540	1439	1945	2167	1838	1484	371	188	181	192	389	619
Site Plans	121	106	104	109	137	130	131	192	173	81	50	145	119	137
Rezoning Applications	39	37	35	50	42	51	35	29	21	17	25	17	28	44
Annexation Studies	17	10	13	20	28	32	20	13	9	5	1	1	5	14

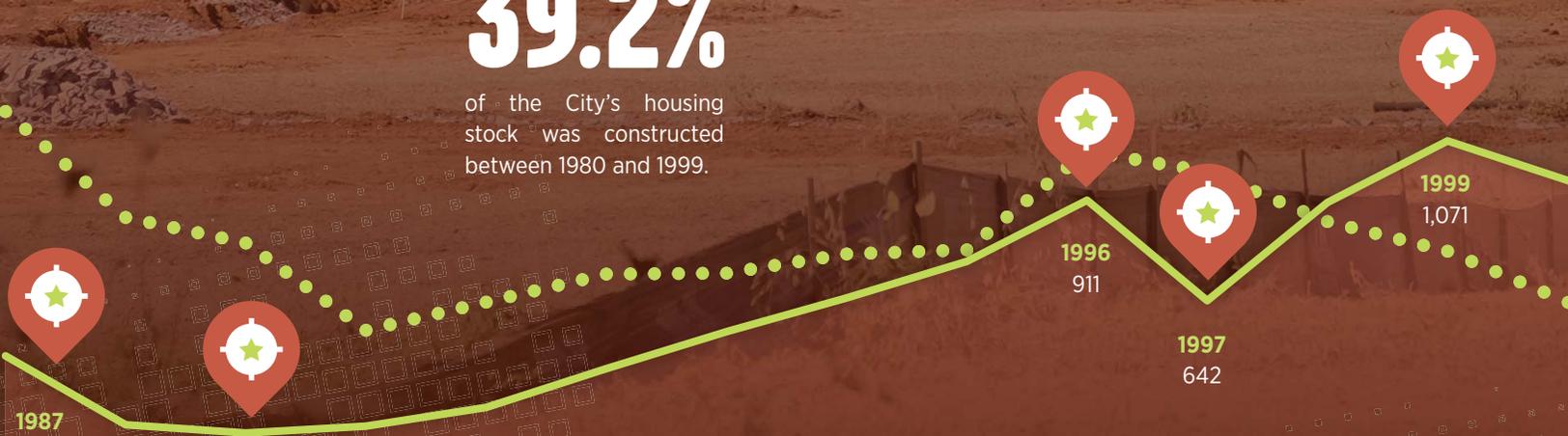
Source: City of Murfreesboro.

### Rucker Lane Development to the West

Source: Kendig Keast Collaborative

39.2%

of the City's housing stock was constructed between 1980 and 1999.



## City and County Development Indicators

FIGURE 1.21, SINGLE-FAMILY UNIT BUILDING PERMITS IN CITY AND COUNTY (1987 - 2013)

- CITY OF MURFREESBORO PERMITS
- RUTHERFORD COUNTY PERMITS (EXCLUDING MUNICIPALITIES)

Source: City of Murfreesboro and Rutherford County.



WHAT ARE THE KEY GROWTH AREAS WITHIN THE CITY OF MURFREESBORO?

“West Murfreesboro. Medical Ctr, Blackman, Salem and Barfield. The reason these areas are attractive is due to the close proximity to major highways for commuting and attracting customers from outside Murfreesboro. There is also ample land available for development. We might be able to add Broad from Thompson to SR-840. I don’t expect this to change anytime soon. There will be industrial development on Joe B Jackson Parkway for the same reason. We just need to be ready for it.”

33.9%

of the City’s housing stock is 15 years old or newer.



2004  
1,904



2010  
346



2013  
711

The national recession impacted Middle Tennessee, resulting in a housing slowdown similar to the rest of the country. Similarly between 2007 and 2008, the City reduced the number of acres annexed from 1,286 to 227 acres. This trend has continued over the past six years.

## CHAPTER 5 PREVIEW

# Housing and Neighborhoods

The fifth chapter of the Comprehensive Plan evaluates the design of neighborhoods within the framework of the City's current development regulations and the resulting impact on existing neighborhoods and associated issues, such as infill development and redevelopment; neighborhood integrity and stabilization; and neighborhood organization and capacity building. The underlying premise of this section is to ensure that there is a wide range of housing options and amenities, such as nearby schools and parks, to accommodate persons desiring to relocate within or to the community. Housing and neighborhood integrity are core issues in Murfreesboro given the level of potential reinvestment required for maintaining older housing stock. Therefore, the section emphasizes policies and initiatives for sustaining Murfreesboro's value as an attractive place to live through housing improvements, targeted reinvestments, diligent code enforcement measures, subdivision and zoning regulations, coordination with Murfreesboro City Schools and Rutherford County School District, and other neighborhood conservation strategies.

## Community Input

### KEY CONSIDERATIONS

- ▶ **Diverse Housing Options.** How can the City encourage a broad spectrum of housing types and price points, ranging from homeless and transitional housing accommodations to executive suites and large estate lots?
- ▶ **Quality Housing Stock.** While recognizing the City needs to provide for the affordability needs of all residents, how can the City encourage high quality materials and visually appealing architectural designs that will hold their value over time?
- ▶ **Regulation and Code Enforcement.** How can the City update and increase its capacity to enforce zoning, subdivision, health, housing, and building regulations to address issues with building and property maintenance, public and private nuisances, absentee landowners, and perceived/actual crime (all too common issues with "town-gown" relations)?
- ▶ **Neighborhood Conservation.** How should redevelopment of land and adaptive re-use of buildings be addressed in the City's land development regulations to ensure compatibility with the existing neighborhoods? How does this compare to "greenfield development" occurring on vacant tracts of raw land?
- ▶ **Neighborhood Leadership.** How can the City help to strengthen identity, embrace diversity, and mobilize leadership in Murfreesboro's neighborhoods?
- ▶ **Neighborhood Amenities.** What are the key elements necessary to make local neighborhoods a success? Neighborhood gathering places, walkable infrastructure, neighborhood connections, convenience services, parks and open space, defensible edge treatments, etc.?
- ▶ **Infill and Adaptive Re-Use.** How can the City encourage development or re-use of vacant residential and neighborhood commercial properties concentrated in the community's older neighborhoods?
- ▶ **School Coordination.** How can the City continue to coordinate with Murfreesboro City Schools and Rutherford County School District to promote suitable neighborhood designs that promote safe and convenient routes for school children and high academic standards that sustain housing market demand?
- ▶ **Expanded Social Services.** In partnership with Rutherford County, the Murfreesboro Housing Authority, and public and private institutions, how can the community expand its social services necessary to accommodate a growing population base?

### RECENT MAJOR ACHIEVEMENTS

- ▶ 2013 - 2014 - After considerable planning for location, Overall Creek Elementary broke ground in late June 2013 in the west side of the community off of Veterans Parkway. This \$20 million dollar investment will allow the City Schools to meet the demand for new classroom space. Construction began on Overall Creek Elementary School in July 2013. The school opened in the fall of 2014 and will serve approximately 1,000 students.
- ▶ 2013 - New \$5.2 million dollar technology program for Murfreesboro Public Schools was launched and consists of nearly \$1 million in infrastructure to school buildings and \$4.2 million of laptop and tablet devices.

[ Continued on page 1.43 ]

## Age of Housing Stock

FIGURE 1.22, PERCENT OF HOMES BUILT IN 2000 OR LATER (2012)

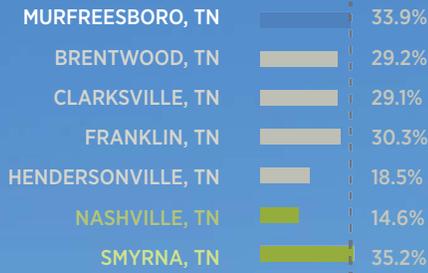


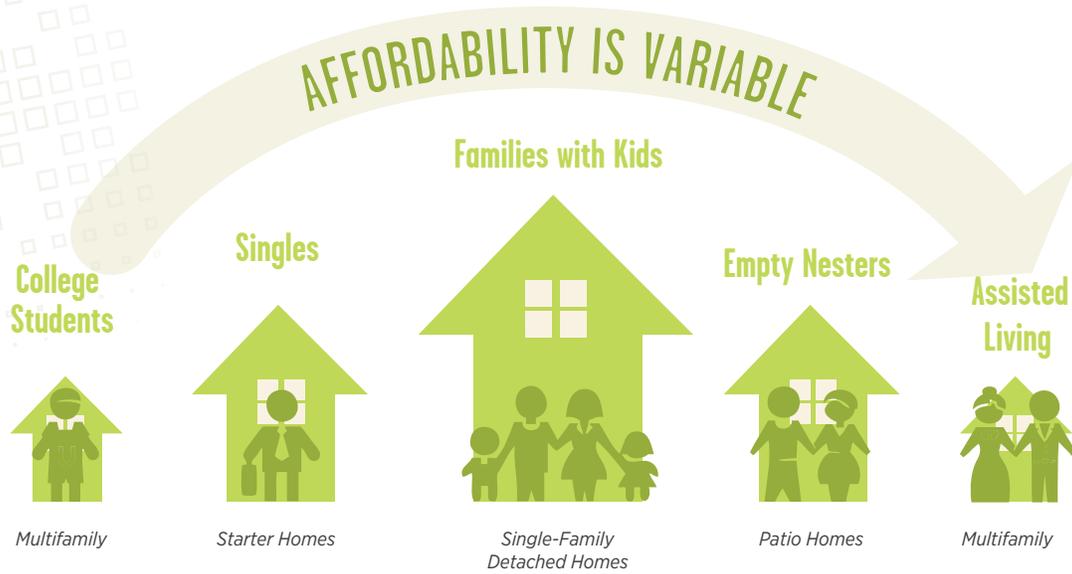
TABLE 1.8, AGE OF HOMES (2012)

	2000 to Present	1980 - 1999	1960 - 1979	1959 or Earlier
Murfreesboro	33.9%	38.2%	18.6%	9.3%
Brentwood	29.2%	44.0%	25.9%	0.9%
Clarksville	29.1%	36.1%	22.9%	11.8%
Franklin	30.3%	50.7%	13.1%	5.9%
Hendersonville	18.5%	40.3%	36.9%	4.3%
Nashville	14.6%	29.3%	32.3%	23.8%
Smyrna	35.2%	42.2%	18.3%	4.2%

Source: U.S. Census Bureau, 2008-2012 American Community Survey.

33.9 percent of the City of Murfreesboro’s housing was built between 2000 and the present. This ranks second (2nd) out of the seven (7) local comparison cities. Although Murfreesboro does have a high percentage of newer housing units, 9.3 percent of the city’s housing stock was built before 1959. This ranks third (3rd) out of the seven (7) local comparison cities. This relatively high percentage is interesting because the City of Franklin (known for its Historic Zoning program) only has 5.9 percent of its housing stock built before 1959.



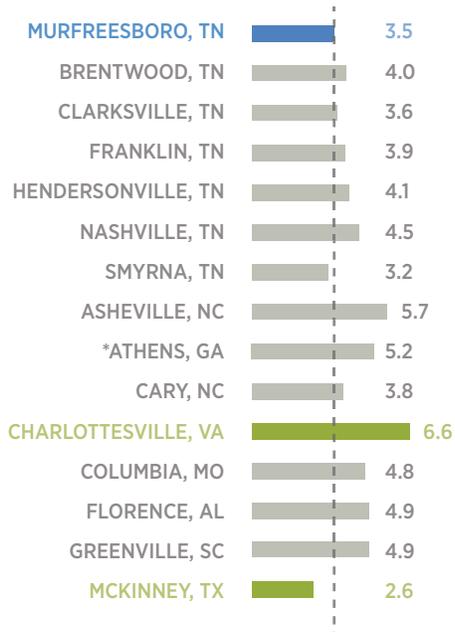


## Affordability

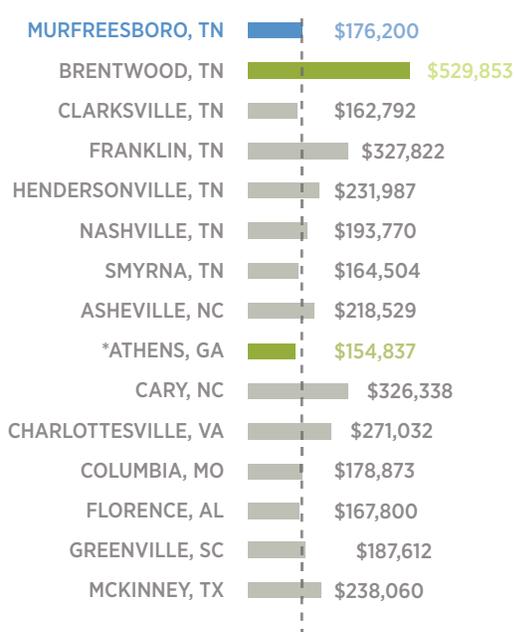
A City's affordability index, as captured in the 2008-2012 American Community Survey is calculated by dividing its median home value into its median household income. The City of Murfreesboro's median home value is \$176,200 and the city's median household income is \$50,768. Murfreesboro ranks second (2nd) out of the seven (7) local cities studied in this comparison.

A diversity of housing sizes, prices, and design types allows the Murfreesboro community to retain and attract residents at every stage in life, a positive attribute often referred to as the ability to "live in place."

**FIGURE 1.23, AFFORDABILITY INDEX (2014)**



**FIGURE 1.24, MEDIAN HOME VALUE (2014)**



Source: KKC based on U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2014 and 2019. ESRI converted Census 2000 data into 2010 geography.

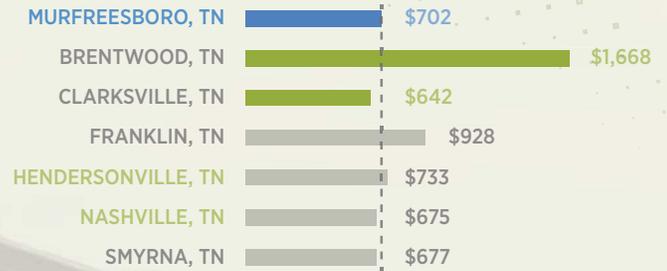
Although Murfreesboro's rental rates are low in comparison to Brentwood and Franklin, MTSU's influence has created a strong demand that has driven the price higher than average.

- ▶ 2013 - The first Citizens Academy was offered. Nineteen Murfreesboro residents spent one night per week for eight weeks being introduced to the services and the people that deliver those services. From participants evaluations the Academy was a success and was offered again in FY 2014.
- ▶ 2009 - *Business Week* magazine named Murfreesboro one of the best places in the country to raise kid. Murfreesboro was also named first in Tennessee and fifth nationally by *Business Week* as being an affordable city in which to raise a family .
- ▶ 2012 - Hobgood Elementary School expansion.
- ▶ 2008 - City Schools earned system-wide accreditation (as opposed to building-by-building) by the Southern Association of Colleges and Schools making Murfreesboro City Schools one of the few systems in the region to earn such accreditation. On the 2008 State Report Card, Murfreesboro City School students exceeded state averages in all subjects on academic achievement earning A's in math, reading, and writing and B's in social studies and science.
- ▶ 2007 - Pittard Elementary was constructed (\$14.4 million).

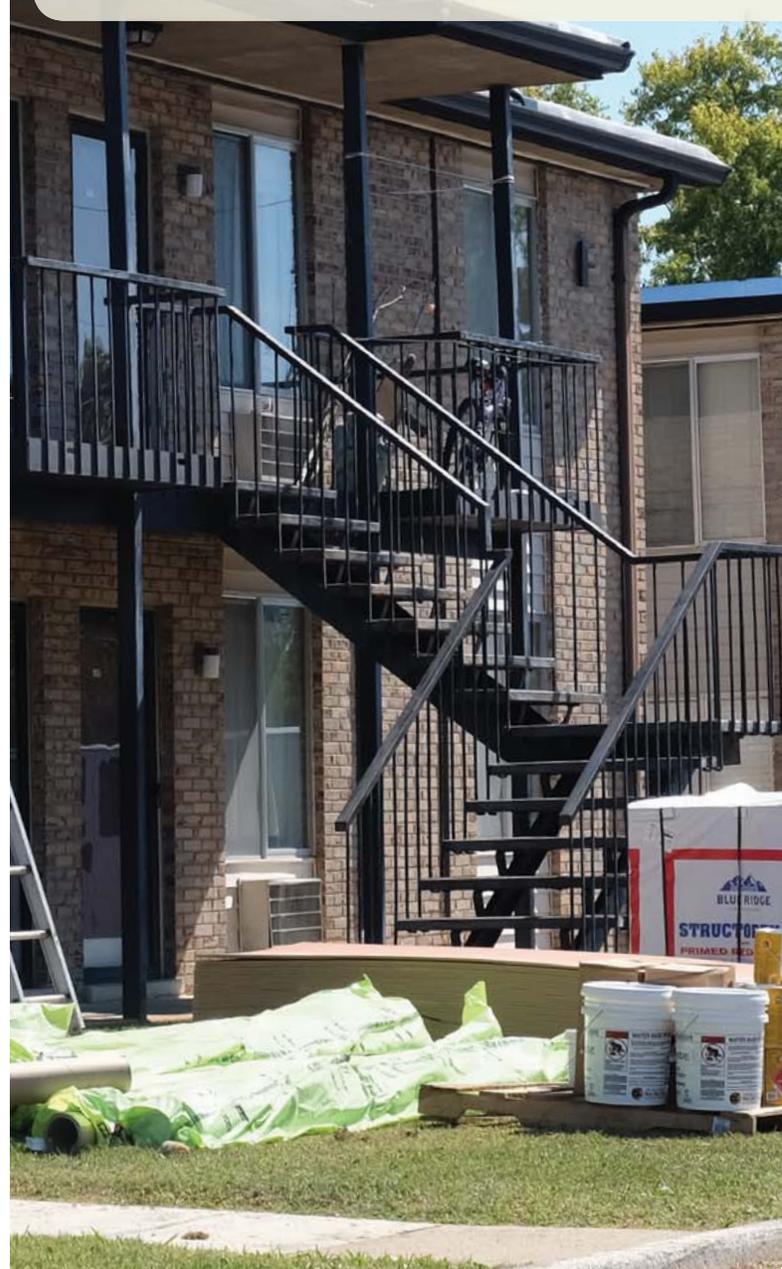
[ Continued on page 1.45 ]

## Rental Rates

FIGURE 1.25, CONTRACT RENT (2012)



Source: U.S. Census Bureau, 2008-2012 American Community Survey.



## Homelessness

FIGURE 1.26, HOMELESS PERSONS IN EMERGENCY SHELTERS, TRANSITIONAL HOUSING, AND UNSHELTERED (2005 - 2014)



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total Homeless Persons in Emergency Shelter	71	260	124	75	99	109	89	90	106	59
Total Homeless Persons in Transitional Housing	54	0	166	0	13	6	38	32	55	9
Total Unsheltered Homeless Persons	0	84	148	148	92	104	98	96	80	76

Source: City of Murfreesboro.

## Murfreesboro Housing Authority

### TOTAL CONVENTIONAL PUBLIC HOUSING UNITS - 336

- ▶ Franklin Heights - 140 Units
  - Constructed 1950
- ▶ Parkside - 46 Units
  - Constructed in 1950 as Highland Heights; two buildings (14 units) were demolished in 2012 and the remaining six buildings were extensively renovated and the project re-branded to Parkside.
- ▶ Mercury Court - 74 Units
  - Constructed in 1960
- ▶ Oakland Court - 76 Units
  - Constructed in 1960
- ▶ Westbrooks Towers - 230 One-BR Units
  - Westbrook Towers was originally constructed as a HUD Section 202 project (supportive housing for income-eligible 62+ seniors). The project is now owned and managed by MHA.

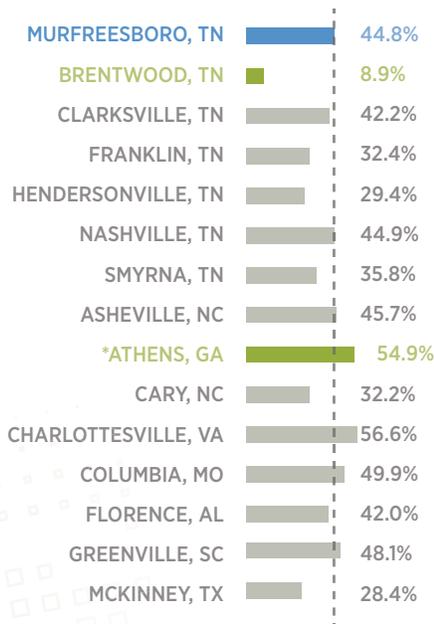
### TOTAL HOUSING VOUCHERS - 703

- ▶ Housing Choice Vouchers (Section 8) - 599
  - MHA's Section 8 waiting list was reopened briefly for applications in 2012 and currently has more than 200 families on it. The Housing Authority does not plan to re-open the list until 2016.
- ▶ Permanent Supportive Housing Vouchers for Homeless/Disabled - 44
  - Funded through HUD Continuum of Care Grant. Application for renewal must be submitted annually.
- ▶ Veterans Affairs Supportive Housing (VASH) - 60

*This information was provided by the Murfreesboro Housing Authority via the City of Murfreesboro Community Development Director in September 2014.*

## Ownership and Occupancy

FIGURE 1.27, RENTER OCCUPATION (2014)



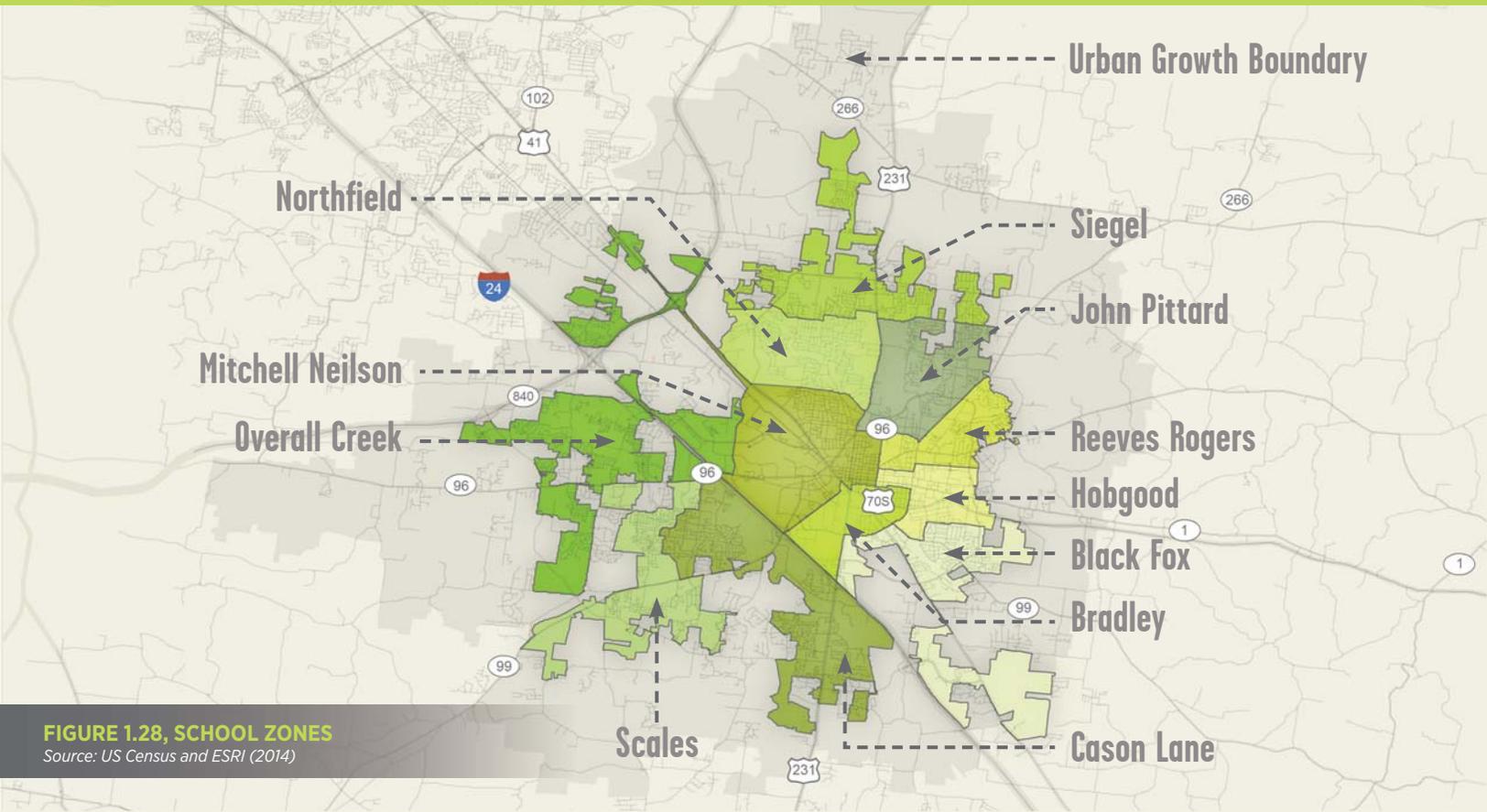
The percentage of owner-occupied units in the City of Murfreesboro has decreased from 52.3 percent in 2000 to 47.7 percent in 2014. The reduction of owner-occupied homes between the years of 2000 to 2014 is not unique in our study group. The only city in the study both locally and nationally which actually saw an increase in owner-occupied homes was Brentwood. Murfreesboro's renter-occupied homes increased from 40.2 percent to 44.8 percent between 2000 and 2014.

Murfreesboro's percentage of vacant homes has neither increased or decreased between the years 2000 and 2014. The rate for both years was 7.5 percent. In 2010, 7.8 percent of Murfreesboro's housing units were vacant. The consistency in the vacancy statistic is unique compared to the other cities analyzed. Although the increase in vacant units is relatively small for some of the cities studied, Murfreesboro is the only city in the study that did not see any increase in their percent of vacant units between 2000 and 2014. Even the City of McKinney, Texas which has more than doubled in city size between 2000 and 2014 still has a higher unit vacancy percentage in 2000 (6.6 percent) than in 2014 (7.1 percent).

TABLE 1.9, VACANCY, OWNER OCCUPATION, AND RENTER OCCUPATION RATES (2014)

	Vacant			Owner-Occupied			Renter-Occupied		
	2000	2010	2014	2000	2010	2014	2000	2010	2014
Murfreesboro	7.5%	7.8%	7.5%	52.3%	49.4%	47.7%	40.2%	42.8%	44.8%
Brentwood	2.8%	3.2%	3.4%	85.2%	90.1%	87.7%	12.0%	6.6%	8.9%
Clarksville	7.8%	9.8%	10.0%	53.1%	50.6%	47.8%	39.0%	39.6%	42.2%
Franklin	6.2%	6.0%	6.4%	66.8%	63.2%	61.2%	27.0%	30.7%	32.4%
Hendersonville	4.1%	6.6%	6.3%	69.8%	66.4%	64.3%	26.1%	26.9%	29.4%
Nashville	6.2%	8.7%	7.9%	51.2%	50.6%	47.2%	42.6%	40.8%	44.9%
Smyrna	4.2%	6.2%	5.9%	63.2%	61.3%	58.3%	32.7%	32.5%	35.8%
Asheville, NC	8.6%	10.2%	9.8%	51.8%	45.2%	44.5%	39.5%	44.6%	45.7%
Athens, GA*	5.7%	11.1%	10.3%	39.3%	37.1%	34.8%	55.0%	51.7%	54.9%
Cary, NC	5.2%	6.4%	6.4%	67.7%	64.5%	61.4%	27.1%	29.2%	32.2%
Charlottesville, VA	4.2%	7.4%	7.6%	39.1%	38.1%	35.8%	56.6%	54.5%	56.6%
Columbia, MO	6.4%	7.9%	7.7%	45.7%	43.7%	42.3%	47.8%	48.4%	49.9%
Florence, AL	10.4%	10.5%	10.6%	52.4%	49.1%	47.4%	37.1%	40.4%	42.0%
Greenville, SC	10.9%	13.0%	12.8%	42.5%	39.5%	39.0%	46.6%	47.5%	48.1%
McKinney, TX	6.6%	7.4%	7.1%	65.9%	65.7%	64.4%	27.5%	26.9%	28.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. ESRI forecasts for 2014 and 2019. ESRI converted Census 2000 data into 2010 geography.



**FIGURE 1.28, SCHOOL ZONES**  
Source: US Census and ESRI (2014)

# Murfreesboro City Schools

## Enrollment Growth

**TABLE 1.10, MURFREESBORO CITY SCHOOLS ENROLLMENT (MULTI-YEAR)**

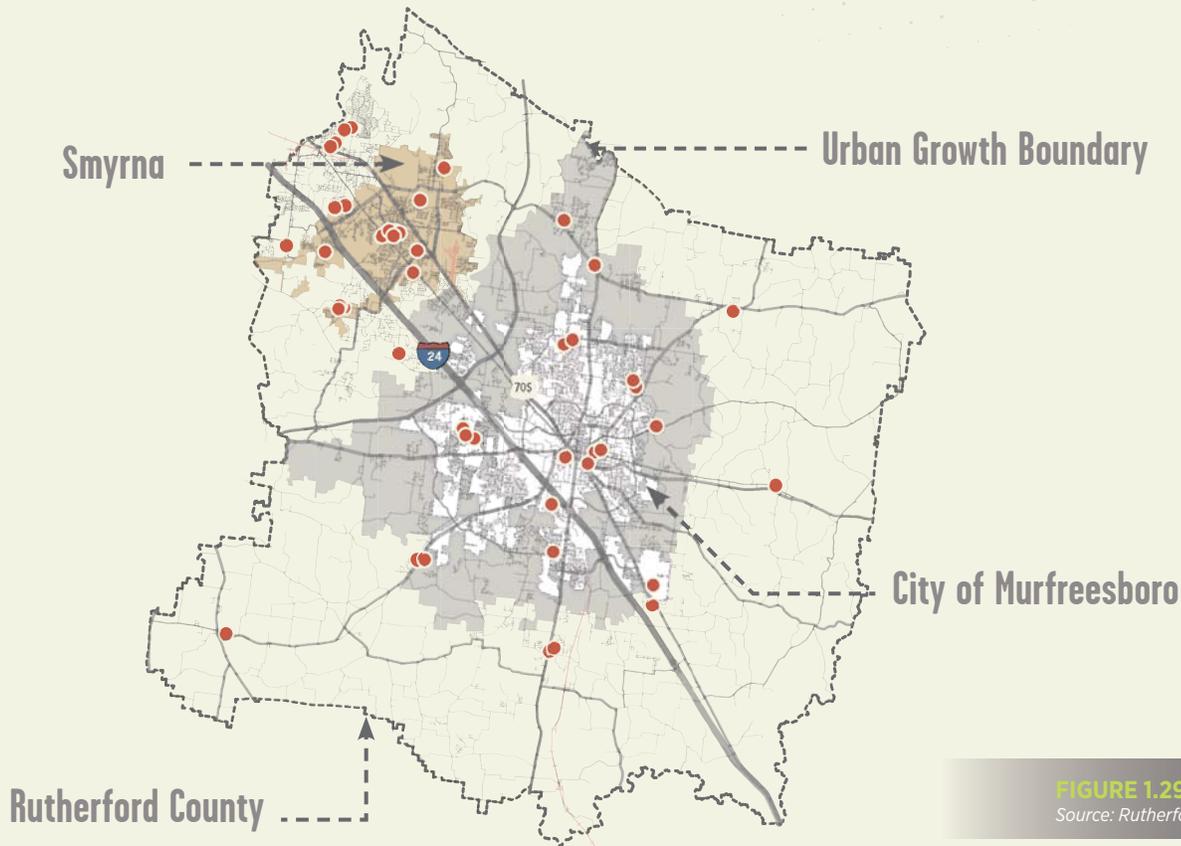
	Murfreesboro City Schools 2014 Plan
<b>Average Annual Growth (# of students)</b>	146
<b>Total Growth since 1988 (# of students)</b>	3,796
<b>Percentage Change of Growth</b>	
Since 2010 - 11	7.99%
Since 2005 - 06	18.56%
Since 2000 - 01	27.72%
Since 1994-95	32.26%
<b>PAST 25 YEARS</b>	<b>46.27%</b>

Source: Murfreesboro Public Schools.

# 46.2%

increase in student enrollment over the past 25 years

When the school system opened during the 2014-15 school year the enrollment was 7,926 students. During the past 25 years the school enrollment for Murfreesboro city schools has increased by 46.27% with an annual average student growth of 146 persons. Despite this rapid growth there was actually a decrease in enrollment during the 2009-10, 2010-11, and 2013-14 school years.



**FIGURE 1.29, COUNTY SCHOOLS**

Source: Rutherford County School District

## Rutherford County Schools

With 46 schools, more than 41,000 students, and the third largest population of English Language students, Rutherford County is one of the largest and fastest-growing school districts in the state. While the increasing population adds many benefits to the quality of life in Rutherford County, the challenge for the school district remains to ensure balanced growth, taking into account that the free/reduced numbers at county schools increases by approximately one percent each year.

### School Facts

**TABLE 1.11, RUTHERFORD COUNTY SCHOOL DISTRICT FACTS**

Students & Teachers : School Year 2013-2014	
Teachers	2,783
Students	41,497
Economically Disadvantaged Students	42.2%
Per-Pupil Expenditure	\$8,365

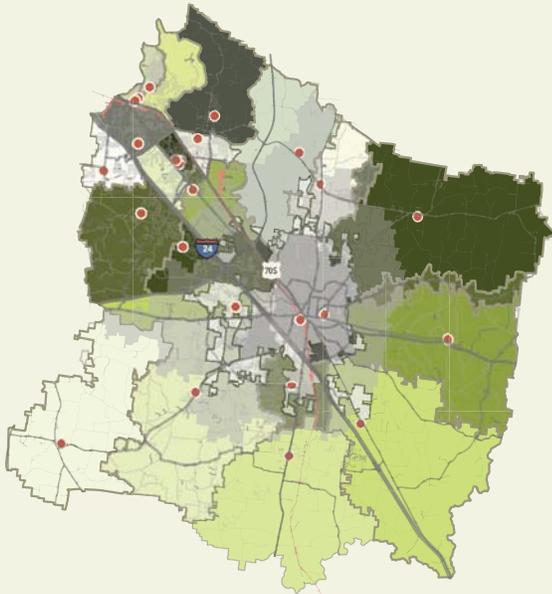
Sources: State School Report Card Rutherford County Profile; Rutherford County School District: Strategic Plan 2014.

The shared vision of Rutherford County schools is to provide students with knowledge and skills to become citizens who can adapt to meet the challenges of tomorrow.

- Rutherford County Schools Strategic Plan 2014

**FIGURE 1.30, RUTHERFORD COUNTY SCHOOLS AND ZONES**

Source: Rutherford County School District



## Rutherford County Schools Enrollment

### ELEMENTARY SCHOOLS

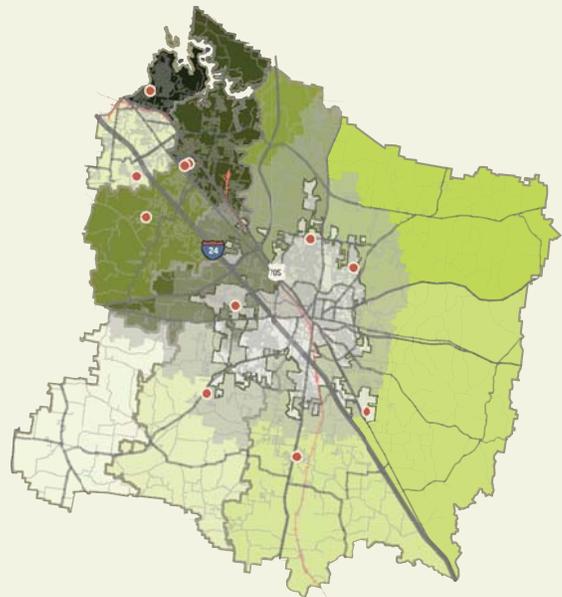
**TABLE 1.11, RUTHERFORD COUNTY ELEMENTARY SCHOOLS ENROLLMENT**

<b>Number of Elementary Schools</b>	25
<b>Enrolled Students</b>	16,378
<b>Percent of Total Enrolled Student in County</b>	39%

### MIDDLE SCHOOLS

**TABLE 1.12, RUTHERFORD COUNTY MIDDLE SCHOOLS ENROLLMENT**

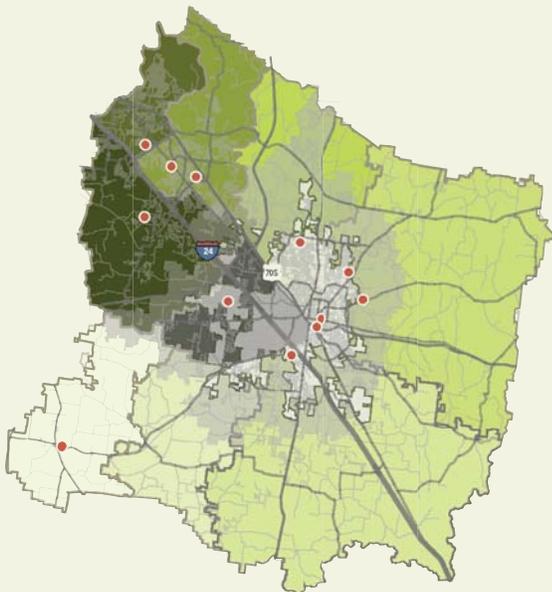
<b>Number of Middle Schools</b>	11
<b>Enrolled Students</b>	10,766
<b>Percent of Total Enrolled Student in County</b>	26%



### HIGH SCHOOLS

**TABLE 1.13, RUTHERFORD COUNTY HIGH SCHOOLS ENROLLMENT**

<b>Number of High Schools</b>	9
<b>Enrolled Students</b>	14,391
<b>Percent of Total Enrolled Student in County</b>	35%



Source: Rutherford County Schools District

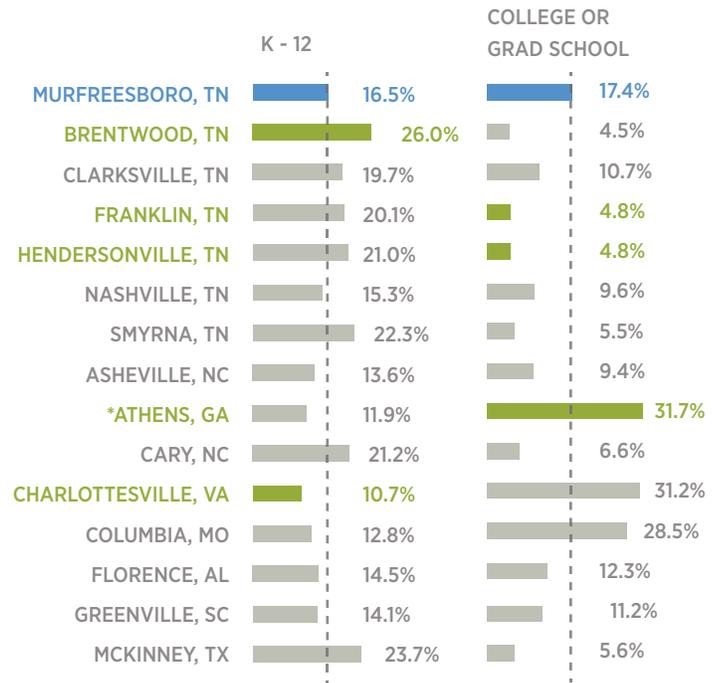
## Educational Enrollment

FIGURE 1.31, KINDERGARTEN THROUGH GRADUATE SCHOOL ENROLLMENT (2012)

Murfreesboro has the highest percentage of residents in either college or graduate school than any of the other Tennessee cities studied.

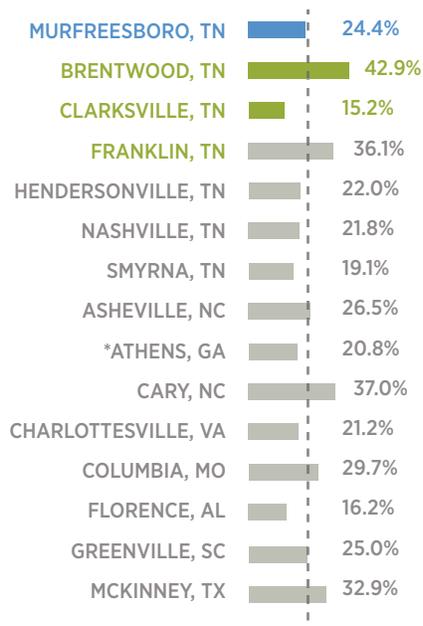
Additionally, the city ranks fifth (5th) out of the fifteen (15) cities studied nationally. This statistic represents the significant number of students enrolled at Middle Tennessee State University, one of the largest universities in the state.

Source: U.S. Census Bureau, 2008-2012 American Community Survey.



## Educational Attainment

FIGURE 1.32, ATTAINMENT OF BACHELOR'S DEGREES (2012)



Source: U.S. Census Bureau, 2008-2012 American Community Survey.

Despite having the largest university and highest college enrollment rate in Tennessee, Murfreesboro's educational attainment percentage is average across all comparison communities. One of the key strategies is to retain MTSU graduates since this is the largest source of employees in Middle Tennessee.

## CHAPTER 6 PREVIEW

# Parks, Recreation and Natural Resources

The sixth chapter of the Comprehensive Plan evaluates the community's livability and "green infrastructure" amenities, particularly its award-winning parks and greenways system, open space areas, and linkages along with critical natural resources. This analysis identifies any deficiencies in the provision of parks, recreation areas and facilities; evaluates whether existing facilities are consistent with the community's preferences; and ensures that future land acquisition and facility improvements keep pace with new development. The conservation of land for open space uses, both for agriculture and natural resources, is another focus of this chapter.

## Community Input

### KEY CONSIDERATIONS

- ▶ **Stormwater Management and Water Resource Planning.** How can drainage projects at the site, neighborhood, or district scale be enhanced with park and recreation amenities? Additional recreational or landscaping uses in coordination with disposal of the City's effluent water supply?
- ▶ **Park System Expansion.** What is the appropriate sequencing for expansion of the City's award winning parks and greenways system to accommodate a population double the size over the next 20 years?
- ▶ **Athletic Fields and Other Facilities.** How can the City expand its athletic fields, swimming facilities, and other recreation complexes to meet the needs of its current and future residents, schools, and league/club sports teams? Increased potential for tournament play?
- ▶ **Public-Private and Intergovernmental Partnerships.** How can the City continue to leverage partnerships, grants, sweat equity, and other funding streams to expand its financial reach to add new amenities to the system?
- ▶ **Balanced System.** How can the City balance the development of regional parks, such as Barfield Crescent Park, while maintaining and preserving

smaller parks and gathering spaces – a major source of community and neighborhood pride?

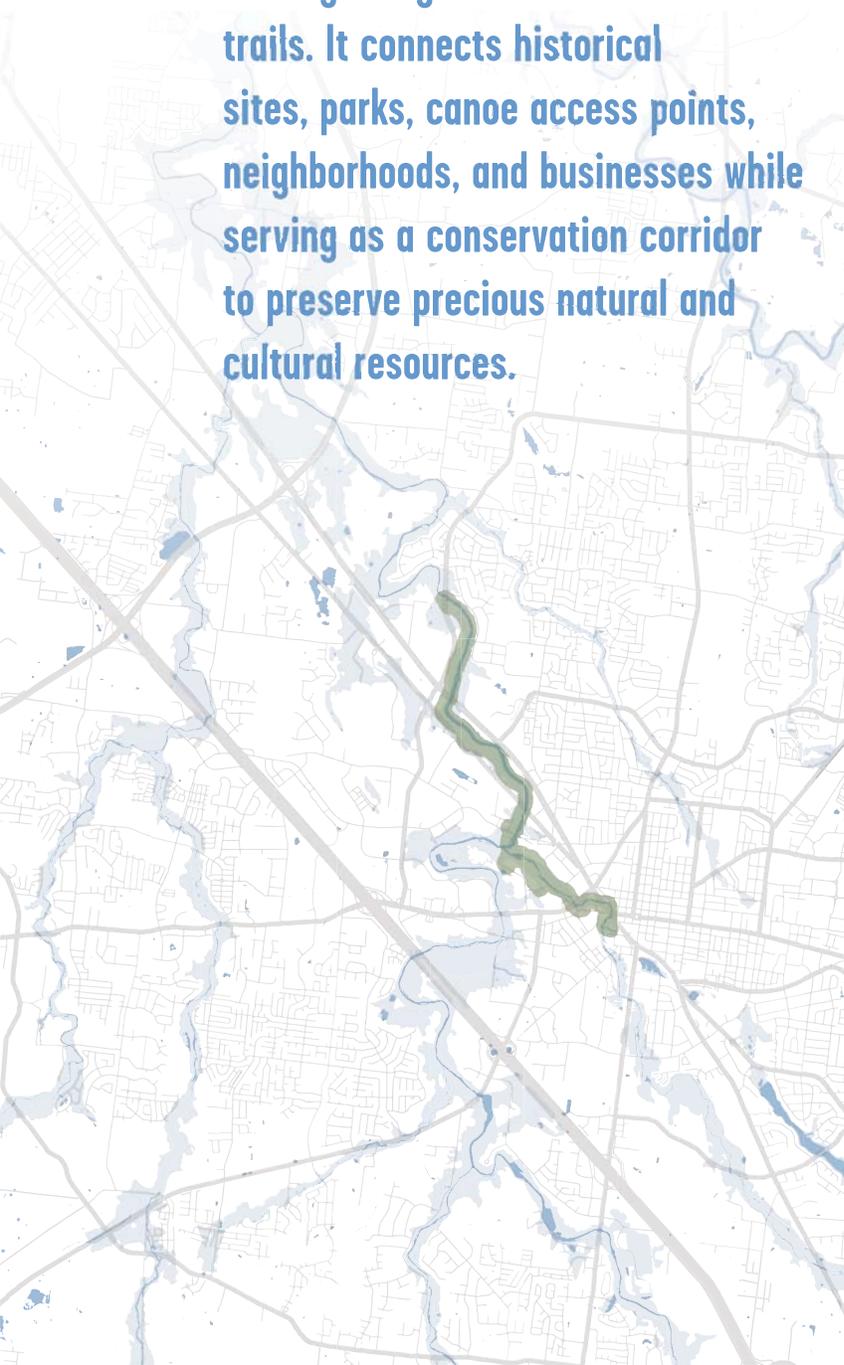
- ▶ **Passive Recreation.** How can the City append its existing system with more passive recreation opportunities, which are typically characterized as undeveloped "natural" spaces oftentimes located in environmentally sensitive areas for the purpose of wildlife habitat, outdoor education, scenic vistas, and peaceful retreats from urban living?
- ▶ **Access and Views of Waterways.** How can the City continue to optimize its access to and views of the Stones River and Lytle Creek areas for recreation and economic development purposes?

### RECENT MAJOR ACHIEVEMENTS

- ▶ 2013 - Renovations to Sports\*Com, Star\*Plex, Patterson Park Community Center, McFadden Community Center, Oakland Park and McKnight Park.
- ▶ 2013 - In partnership with Middle Tennessee State University, the City broke ground on an eight-court indoor tennis complex. The City provided the site and approximately 66% of the funding, with the University providing the balance of the \$4.0 million complex. Opening of the indoor tennis center is planned for late 2014.
- ▶ 2013 - Old Fort Golf Course obtained grant funds, commitments from the City and from other private entities to construct a six-hole learning facility.
- ▶ 2013 - State Route 99 in the west to Barfield-Crescent Park on the south was delayed due to the rerouting of the trail. Two segments of the route are scheduled for construction in early 2014.
- ▶ 2012 - 2013 - Construction of the Stones River Greenway extension to Barfield Crescent Park began.
- ▶ 2011 - In conjunction with federal grants (80 percent funding versus 20 percent match) the City has also continued work on its greenway system. The Greenway Phase III opened in the spring of 2011. The Greenway Phase IV extension to Barfield Crescent Park is expected to be bid in the summer of 2013. Appraisals of right of way acquisitions are currently under review, as well.
- ▶ 2010 - The investment in quality recreational facilities, including the City's 15 field soccer continues to bring outside interest to our area. The President's Cup soccer tournament, national girls' softball qualifying tournament, and the Tennessee state baseball tournament was held in Murfreesboro.

**MURFREESBORO GREENWAY SYSTEM**

The Murfreesboro Greenway System consists of the Stones River and Lytle Creek trails and 11 trailheads, including facilities for nature hikes, walking, running, bicycling, or in-line skating along five miles of riverside trails. It connects historical sites, parks, canoe access points, neighborhoods, and businesses while serving as a conservation corridor to preserve precious natural and cultural resources.



**Sports and Leisure Potential**

FIGURE 1.33, LIKELIHOOD OF PARTICIPATION IN SPORTS AND LEISURE ACTIVITIES IN THE PAST 12 MONTHS (2013)



Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. ESRI forecasts for 2013 and 2018.



- ▶ 2009 - The City opened Phase II of the Stones River greenway extension.
- ▶ 2009 - Murfreesboro was chosen to host the 2011 U.S. Youth Soccer regional championships. Local restaurants, hotels, retail stores and other businesses in the community benefited from the more than 10,000 players, coaches, teams and tournament officials and their families that attended this six day tournament. The economic impact of this tournament to the area exceeded \$7 million.
- ▶ 2009 - The Gateway Island Trailhead was completed and includes a 3-mile extension of the Stones River Greenway around the north side of Medical Center Parkway. The island includes a gazebo and reception center, a pond with waterfalls and a lighted walking/jogging trail. There are picnic tables and benches strategically placed in the park for residents and visitors to use. Planning continues on the North Murfreesboro Greenway, and the extension of the Stones River Greenway to Barfield Crescent Park and for a master plan to renovate and improve the Walter Hill Park that the City acquired in 2005.
- ▶ 2009 - A joint agreement between Rutherford County and the City of Murfreesboro was signed to construct 16 tennis courts at Old Fort Park. Construction began in March 2009 and the courts will be available for county school use during their tennis season and for public use during other times of the year. The City's contribution to the project was approximately \$750,000.
- ▶ 2006 - The 132-acre Richard Siegel Park Phase I, which includes 10 full-size soccer fields, was opened for community use.
- ▶ 2006 - The Richard Siegel Park, along with McKnight Park and Old Fort Park played host to the 2006 Tennessee Secondary School Athletic Spring Fling which is the state high school sports championships in soccer, girls' fast-pitch softball, and tennis. The tennis court complex at Old Fort Park was resurfaced and color-coated in preparation for this event. Phase I of the Stones River Greenway Extension was completed; a highlight of which includes the beautiful new pavilion, which seats 144 patrons, and includes restrooms and a spacious concession facility.
- ▶ 2005 - Phase I of the Richard Siegel Park was completed.
- ▶ 2005 - Phase I of the Oakland Wetlands project was completed, along with the engineering and architectural requirements for Phase II. Phase II of the Murfree Spring Wetland project was completed. The City of Murfreesboro acquired the operation and maintenance of Walter Hill Park.
- ▶ 2004 - The City of Murfreesboro Parks Department was awarded two Four-Star Awards of Excellence; one of which was for Patterson Community Park, which deemed the best new recreational facility in the state. The other award was for the best recreational program, and this award went to the Wilderness Home School Program.
- ▶ 2008 - The Old Fort Golf Course hosted the Tennessee Secondary School Athletic Association (TSSAA) State Golf Championships in September and October for both the girls and boys in all classifications. The economic impact on the City of Murfreesboro, as reported by the Rutherford County Chamber of Commerce, has been estimated at \$975,000 for the three weeks the tournaments were held.

[ Continued on page 1.56 ]

Source: Ken Robinson



### Hiking

FIGURE 1.34, LIKELIHOOD OF HIKING IN PAST 12 MONTHS (2013)



Murfreesboro residents have active lifestyles that require a wide variety of parks, recreation, and natural resource amenities. As part of the public engagement process, residents specifically requested expansion of the City's athletic complexes.

### Jogging / Running

FIGURE 1.35, LIKELIHOOD OF JOGGING / RUNNING IN PAST 12 MONTHS (2013)



### Swimming

FIGURE 1.38, LIKELIHOOD OF SWIMMING IN PAST 12 MONTHS (2013)



### Baseball

FIGURE 1.36, LIKELIHOOD OF PLAYING BASEBALL IN PAST 12 MONTHS (2013)



### Soccer

FIGURE 1.39, LIKELIHOOD OF PLAYING SOCCER IN PAST 12 MONTHS (2013)



### Canoeing

FIGURE 1.37, LIKELIHOOD OF CANOEING IN PAST 12 MONTHS (2013)



### Tennis

FIGURE 1.40, LIKELIHOOD OF PLAYING TENNIS IN PAST 12 MONTHS (2013)



Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. ESRI forecasts for 2013 and 2018.

## Road Bicycling

**FIGURE 1.41, LIKELIHOOD OF ROAD BICYCLING IN PAST 12 MONTHS (2013)**



*Source: Percentages are based on total population. These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. ESRI forecasts for 2013 and 2018.*



### WHAT ARE MURFREESBORO'S TOP ACCOMPLISHMENTS IN RECENT YEARS?

“This is becoming a first rate place to bike. But drivers have to buy-in to expanding those opportunities in town. You could make this town a real tourist destination with a solid biking community.”



## CHAPTER 7 PREVIEW

## Economic Development

The seventh chapter of the Comprehensive Plan addresses ways to strengthen and diversify the local economy. This strategy includes reviewing current conditions and initiating action steps for growing the community in a way that is both feasible and compatible with Murfreesboro's character and vision for the future. These policies outline ways to support and retain existing businesses, attract and grow new job-creating businesses, and train the community's workforce for current and future labor needs. This effort will tie-in with relevant analyses and studies by the Rutherford County Chamber of Commerce; Destination Rutherford, a 501(c)(6) not-for-profit economic development organization; influence of Medical Center Parkway developments; growing footprint of Middle Tennessee University (MTSU); and the economic impacts of the Murfreesboro Municipal Airport and Smyrna/Rutherford County Airport. Of particular importance to this plan section are the physical planning components that contribute to Murfreesboro's readiness to accommodate new development and reinvestment, as

modeled by the Gateway project and recent completion of Joe B. Jackson Parkway. The chapter will contain sufficient economic analysis and background to set out a proactive program to sustain and strengthen the community's economy in a manner that is consistent with the community's objectives for its future growth and character.

## Community Input

### KEY THEMES

- ▶ **Business and Industrial Parks.** How can the City leverage existing and prospective business and industrial parks, particularly Interstate 24 developments along Joe B. Jackson Parkway and Medical Center Parkway, to attract high quality jobs and long-term tax revenues? Where should land be set aside for the next generation of business and industrial land?
- ▶ **Competitive Advantages.** What are Murfreesboro's competitive advantages that set it apart from its neighborhoods, retail stores, industrial parks, business districts, recreational parks and trails, and other community amenities to compete for residents and businesses within Middle Tennessee?
- ▶ **Community Identity.** What is Murfreesboro's unique city brand that sets it apart from its neighbors, Franklin, Smyrna, Brentwood, and to some extent Nashville?
- ▶ **White-Collar Jobs.** How can Murfreesboro recruit more white-collar jobs to diversity the labor force and increase the median income, which will increase residents' and business owners' spending power?
- ▶ **MSTU Partnerships.** How can the community strengthen its ties to MTSU and its direct and indirect economic impacts, including a diverse pool of highly trained professionals that can both attract and retain high quality jobs?
- ▶ **Medical Tourism.** With the \$267 million investment in Middle Tennessee Medical Center (MTMC) and construction of Murfreesboro Medical Clinic, how can the City encourage medical professionals to live in the City? How can the City promote enhanced medical tourism, which would increase the City's retail sales and hotel/motel tax base?
- ▶ **Support for Businesses.** How can the City continue to expand its tax base at major mixed-use destinations, such as the Gateway , while concurrently supporting

**WHAT IS THE ONE "GAME CHANGER" IN MURFREESBORO THAT WILL DEFINE THE CITY'S FUTURE?**

**"STEM jobs. We have a large health care industry sitting in our back yard. Where are the health care technology jobs and research facilities? We need to bring in more of these jobs to keep our metro a top destination for health care. Technology is the way of the future, not manufacturing."**



**AMAZON FULFILLMENT CENTER**

Amazon opened a fulfillment center in Murfreesboro in 2012 along Joe B. Jackson Parkway. The 1 million square foot distribution center space represents an investment of over \$76 million. Year round employment includes approximately 1,150 people, but during the Christmas season, employment increases to over 3,500 jobs. The facility shipped its first package on September 21, 2012. Amazon recently completed a \$9.2 million expansion of the automated storage and retrieval system, now used in approximately 50% of the facility work space. With this improvement, employment increased by 200 people during most of the year and an additional 1,500 temporary positions during the Christmas season.



small businesses through programming, technical support, incubation services, funding, and consumer spending?

- ▶ **Arts and Culture.** How can the City's vibrant performing and fine arts scene be enhanced and co-marketed?
- ▶ **Airport Corridor.** How can the City and its regional partners solicit buy in to a southeast Nashville area airport corridor, which links MTSU's top-ranked aerospace degree program with the Murfreesboro Municipal Airport, Smyrna/Rutherford County

Airport, and Nashville International Airport. How can the City increase its share of positive economic impacts from the presence of growing airport needs?

**RECENT MAJOR ACHIEVEMENTS**

- ▶ 2015 - Construction of a \$147 million MTSU Science Building, a 257,000 square foot state of the art-facility. The City pledged \$1 million over three years to assist in funding.
- ▶ 2014 - Construction of the \$16 million Student Services and Admissions Center Building east of the new Student Union and adjacent to Campus Recreation.



- ▶ 2014 - Ongoing construction of the Schwan Cosmetics headquarters and manufacturing, representing an investment of \$38 million and is expected to create 250 new jobs over the next five years. The total number of people employed will eventually reach 450.
- ▶ 2013 - CNN ranked the county eleventh (11th) overall in the country for job growth.
- ▶ 2013 - Nissan added a third shift, increasing its Smyrna facility by 900 jobs. Nissan added 400,000 square feet of warehouse space to the back of the previous Singer Sewing factory. The project will house some call center, engineering and IT workers. The building will be shared by the Nissan Export Center and a parts-return operation. Approximately 400 new jobs were created. The City has maintained the existing level of property tax for 15 consecutive years without an increase (2013).
- ▶ 2013 - \$6.9 million expansion of the NHK campus located just west of the Amazon site. NHK, a manufacturer of automobile seat components, had constructed two buildings on site and has begun operations. Employment currently tops 150 jobs with an investment of over \$55 million in facilities and equipment. 2012 - Rutherford County saw an increase of 7.92 percent in tourist spending (according to the Tennessee Department of Tourist Development and the U.S. Travel Association).
- ▶ 2013 - Construction of a \$700,0000 MTSU Flight Simulator Building at the Murfreesboro Airport. The building will support the Aerospace Department's flight training coursework.
- ▶ 2013 - Murfreesboro Medical Clinic (MMC) expanded their office with a 155,043 square foot, three story addition to the existing 78,549 square feet building on the 19.95 acre campus fronting Garrison Drive with access to Carl Adams Drive. MMC will utilize the new addition in conjunction with the existing structure to provide over 204,000 usable square feet of medical treatment and office building.
- ▶ 2012 - Amazon opened a fulfillment center in Murfreesboro in 2012 along Joe B. Jackson Parkway. The 1 million square foot distribution center space represents an investment of over \$76 million. Year round employment includes approximately 1,150 people, but during the Christmas season, employment increases to over 3,500 jobs.
- ▶ 2012 - City approved a new website and enhanced its social media presence (2012).
- ▶ 2011 - Murfreesboro's Embassy Suite and adjoining 89,000 square foot Conference Center was selected to serve as host of its first annual meeting of the Tennessee Municipal League, bringing over 1,300 municipal elected and appointed officials to the City for a four day conference.
- ▶ 2010 - Construction of the Middle Tennessee Medical Center (MTMC). The \$267 million facility replaced an aging hospital landlocked in the center of Murfreesboro. The hospital is licensed for 286 beds (a 27 percent capacity increase from the previous building) in two patient towers, one a seven story wing and the other a five story structure. The new building is 556,000 square feet and was designed in a manner that future expansions can occur as needed. MTMC broke ground on their second medical office building in November 2010. The Seton Medical Office building is an 113,100 square foot, four-story structure to the west of the main hospital and to the north of the original DePaul Medical Office Building.
- ▶ 2010 - Rutherford County Visitors Center and Chamber of Commerce opened on Medical Center Parkway in December 2010. This 33,000 square foot building houses the offices of the Chamber, a Visitors Center, and the Small Business Center of Middle Tennessee State University. Total cost of the project was \$6.6 million from a variety of Federal, State and local funding sources.
- ▶ 2008-2009 saw the Opening of a 283-room Embassy Suites with an attached 80,000 square foot Conference Center at the intersection of Medical Center Parkway and Interstate 24. The hotel and meeting space are another private investment stemming from the City's Gateway Initiative to create new retail, hospitality, medical and office development along a new northern entrance corridor from Interstate 24 to the center of Murfreesboro.

[ Continued on page 1.62 ]



WHAT ARE MURFREESBORO'S TOP ACCOMPLISHMENTS IN RECENT YEARS?

“The development at Joe B Jackson. Joe B Jackson industrial area has brought much needed activity to a part of Murfreesboro which had needed industry. We should not stop there but should develop and compete with Cool Springs for large corporate office developments and head quarters.”

SCHWAN COSMETICS

Schwan Cosmetics is constructing a \$38 million headquarters and manufacturing facility in Murfreesboro. The investment will create 250 new jobs over the next five years. The total number of people employed will eventually reach a total of 450.



Schwan Cosmetics  
Source: Kendig Keast Collaborative

Employers

TABLE 1.14, LARGEST EMPLOYERS IN MURFREESBORO (2014)

One of the most important economic development strategies for the City is to retain its existing employers.

Rank	Employer	Sector	Employees (FTEs <sup>1</sup> )
1	Rutherford County Government	Government	6,073
2	Middle Tennessee State University	Education	2,205
3	National HealthCare Corporation (NHC)	Healthcare	2,071
4	State Farm Insurance Companies	Insurance	1,662
5	Alvin C. York Veterans Administration Medical Center	Healthcare	1,461
6	Amazon.com	Distribution & Warehousing	1,200
7	Middle Tennessee Medical Center	Healthcare	1,100
8	Verizon Wireless	Telecommunications	1,068
9	City of Murfreesboro	Government	960
10	Johnson Controls	Automobile Manufacturing	885

(1) Full Time Equivalents (FTEs)  
Source: Chamber of Commerce.

## Largest Industry Sectors

TABLE 1.15, LARGEST INDUSTRIES IN MURFREESBORO (2014)

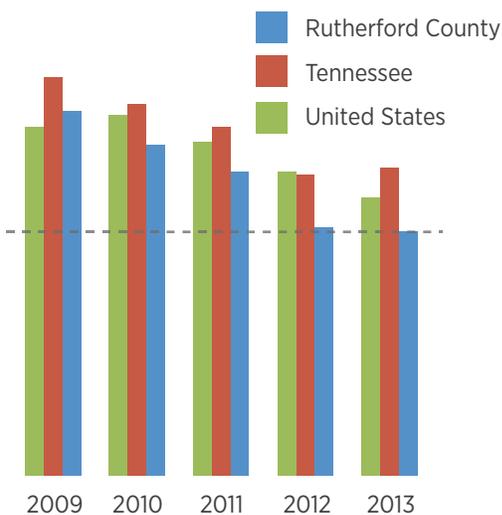
	Businesses		Employees (FTEs <sup>1</sup> )		
	Number	Percent	Number	Percent	
1. Manufacturing	187	2.4%	11,038	20.2%	
2. Retail Trade	793	10.3%	8,385	15.4%	
3. Accommodation & Food Services	351	4.6%	5,207	9.5%	
4. Health Care & Social Assistance	543	7.1%	4,441	8.1%	
5. Educational Services	165	2.1%	3,816	7.0%	

(1) Full Time Equivalents (FTEs)  
Source: Dun & Bradstreet, Inc.

Rutherford County has consistently had lower unemployment rates than the state and has typically performed better than the nation.

## Unemployment

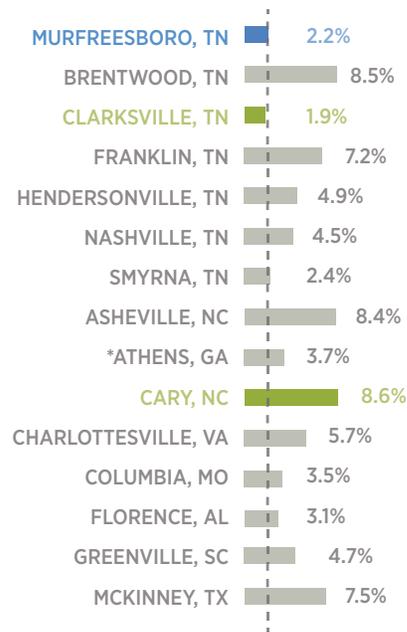
FIGURE 1.42, UNEMPLOYMENT AVERAGE ANNUAL RATES (2009 - 2013)



Source: Bureau of Labor Statistics.

## Working at Home

FIGURE 1.43, RESIDENTS THAT WORK AT HOME (2012)

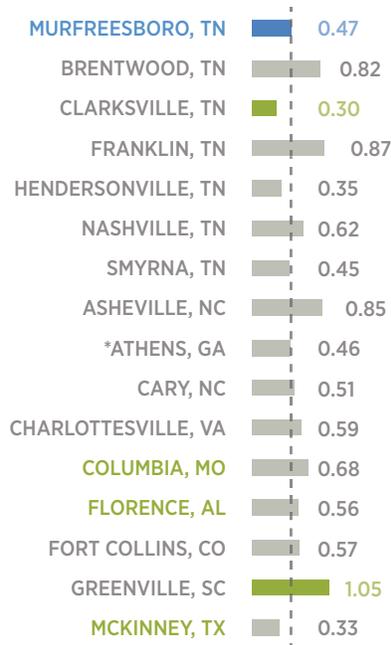


Source: U.S. Census Bureau, 2008-2010 American Community Survey.

Murfreesboro has a very low percentage of workers who work primarily from home compared to the study group. Only 2.2% of employees work from home in Murfreesboro. Only the City of Clarksville with 1.9% had a lower percentage. Growth in this sector could justify increased support for business incubator programs.

## Employee-Resident Ratio

FIGURE 1.44, EMPLOYEE-RESIDENT RATIO (2014)



Source: Dun & Bradstreet, Inc. ESRI Total Residential Population forecasts for 2014.

Murfreesboro has a relatively low employee to resident ratio of 0.47. The city currently has 115,999 residents and only 54,532 employees. Out of the cities compared nationally, Murfreesboro ranks eleventh (11th) out of fifteen (15). However locally, Murfreesboro ranked fourth (4th) out of seven (7).

Of the seven cities studied locally Murfreesboro has the second highest percentage of residents who work within their home county. 71.1 percent of residents who live in Murfreesboro work in Rutherford County. Only the City of Nashville at 82.8 percent has a higher percentage who residents who also work in the same county. This is a significant statistic that goes against the perception that Murfreesboro is a bedroom community for Nashville. However Murfreesboro did not rate as well on the national statistic placing ninth (9th) out of fifteen (15). This statistic however could be somewhat misleading because the majority of cities selected nationally for the study are central metropolitan cores instead of suburban communities. However one could also argue that Murfreesboro's relatively high score locally and low score nationally is a function of a sprawling Nashville region.

## Employees and Businesses

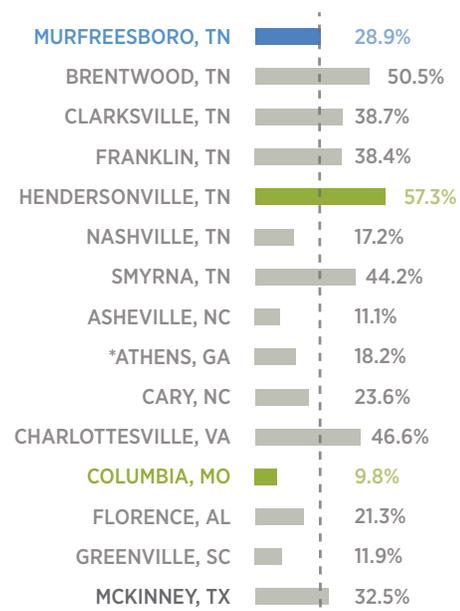
TABLE 1.16, TOTAL RESIDENTS, EMPLOYEES, AND BUSINESSES (2012)

	Total Residents	Total Employees	Total Businesses
Murfreesboro	115,999	54,532	7,699
Brentwood	40,057	32,854	5,055
Clarksville	146,001	43,175	6,615
Franklin	67,602	59,023	7,567
Hendersonville	54,350	19,187	4,040
Nashville	627,382	390,181	51,279
Smyrna	43,011	19,453	2,696
Asheville, NC	88,296	75,145	11,962
Athens, GA*	121,528	55,802	8,092
Cary, NC	148,666	76,342	12,387
Charlottesville, VA	45,078	26,633	4,675
Columbia, MO	115,069	78,419	8,085
Florence, AL	40,053	22,328	2,929
Greenville, SC	61,414	64,487	7,750
McKinney, TX	148,225	48,412	11,863

Source: ESRI Total Residential Population forecasts for 2014.

## Location of Jobs

FIGURE 1.45, PERCENTAGE OF RESIDENTS WORKING OUTSIDE OF COUNTY (2012)



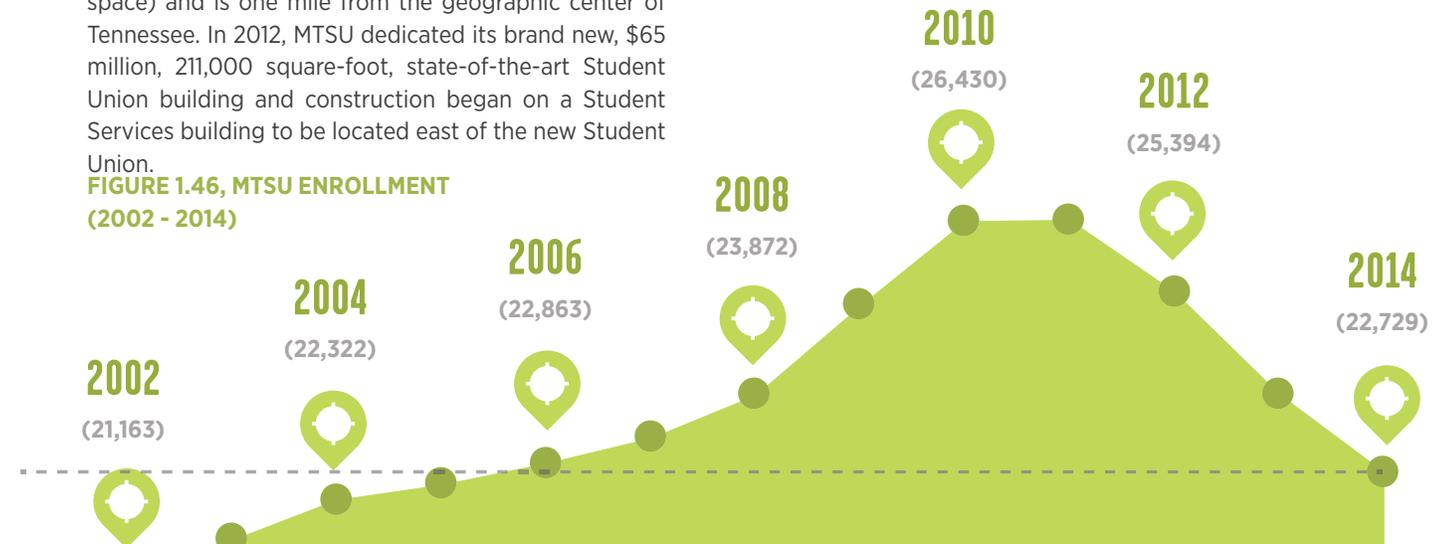
Source: U.S. Census Bureau, 2008-2010 American Community Survey.

## Middle Tennessee State University

Middle Tennessee State University (MTSU) in Murfreesboro, founded in 1911, is a Tennessee Board of Regent institution and one of the largest public universities in the state. MTSU enrolled approximately 23,000 students in fall 2014. The university offers more than 140 programs including Master's degrees in ten (10) areas. The university also has nationally and internationally recognized programs in aerospace, business, mass communication and the recording industry. MTSU has developed the nation's only four-year program of study and a degree in Concrete Industry Management.

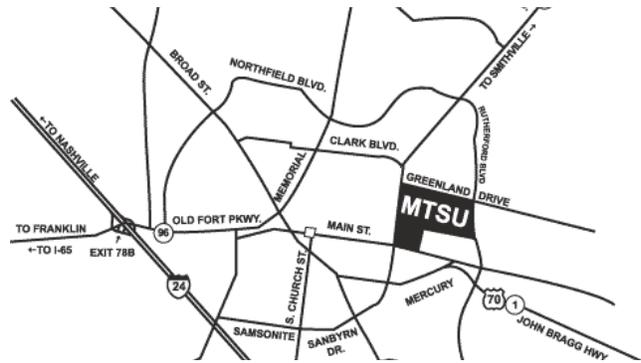
Located on a 500+acre campus, the university has 109 permanent buildings (3.8 million square feet of space) and is one mile from the geographic center of Tennessee. In 2012, MTSU dedicated its brand new, \$65 million, 211,000 square-foot, state-of-the-art Student Union building and construction began on a Student Services building to be located east of the new Student Union.

**FIGURE 1.46, MTSU ENROLLMENT (2002 - 2014)**



**MTSU's enrollment has almost quadrupled in the past 43 years from 6,779 students in 1968 to 26,442 in fall 2011.**

*MTSU continues to be the number one producer of college graduates for the greater Nashville job market.*



Construction of the new, \$125 million MTSU Science Building began in the summer of 2012. The facility is planned for completion by spring 2015.

**Middle Tennessee State University Science Building**  
Source: MTSU



**WHAT IS THE ONE “GAME CHANGER” IN MURFREESBORO THAT WILL DEFINE THE CITY’S FUTURE?**

“The Gateway District needs to add more white collar corporate jobs. It needs to be zoned mixed use to add more retail, restaurants, and commercial activity. Landing these types of jobs will finally catapult Murfreesboro into a more independent city. Right now, residents with advanced degrees are either unemployed, underemployed, or have to drive to Nashville or Franklin to work. Murfreesboro needs these jobs right here at home....”



**Gateway Project**  
Source: Kendig Keast Collaborative

The gateway project has boosted the City's retail and restaurant inventory, introducing many upscale options not previously offered in Murfreesboro.

## Regional Retail Leakage

TABLE 1.17, RETAIL TRADE AND FOOD AND DRINK INDUSTRIES (2013)

The retail gap represents the difference between Retail Potential and Retail Sales. A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area.

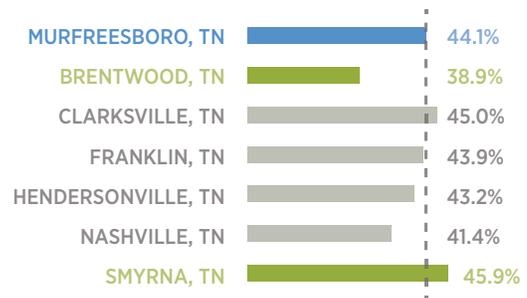
	Retail Trade Gap	Food and Drink Gap
Murfreesboro	(\$645,704,895)	(\$58,121,942)
Brentwood	\$57,696,706	(\$3,728,500)
Clarksville	(\$264,854,918)	(\$34,967,961)
Franklin	(\$818,016,376)	(\$24,852,332)
Hendersonville	(\$43,423,932)	(\$8,396,349)
Nashville	(\$3,241,565,411)	(\$470,709,629)
Smyrna	(\$94,670,116)	(\$15,489,445)

Sources: ESRI and Dun & Bradstreet

When employment rises, it's often positive for the restaurant industry, as people who didn't have a job now have income. As income rises, there's less incentive to spend time cooking at home and more incentive to eat out or trade up, which increases the market size of the restaurant industry. Higher disposable income, which also depends on employment growth, is another factor that can affect restaurant sales. When disposable income grows, consumers will often trade up on their eating habits.

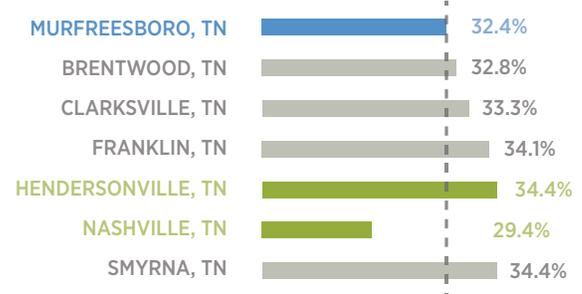
## Fast-Food or Drive-In Restaurants

FIGURE 1.47, LIKELIHOOD TO HAVE DINED AT A FAST-FOOD OR DRIVE-IN RESTAURANT IN PAST 12 MONTHS (2013)



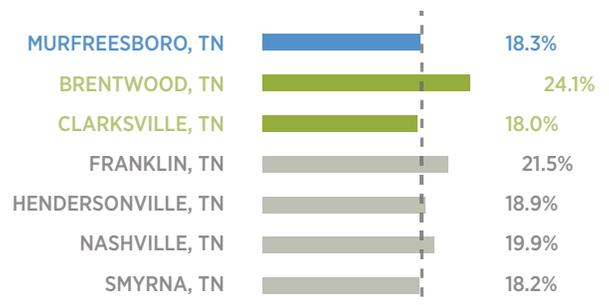
## Family Restaurants

FIGURE 1.48, LIKELIHOOD TO HAVE DINED AT A FAMILY RESTAURANT IN PAST 12 MONTHS (2013)



## Organic Foods

FIGURE 1.49, LIKELIHOOD TO HAVE PURCHASED ORGANIC FOODS IN PAST 12 MONTHS (2013)



Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. ESRI forecasts for 2013 and 2018.

# Retail Potential

FIGURE 1.50, RETAIL GAP ANALYSIS (2013)



# 39.4%

of Murfreesboro residents agree buying American is important