

Murfreesboro Downtown City Block Redevelopment

Call for Proposals
Due Date: January 26, 2017, 3pm

DECEMBER 2016



PROPOSALS

Proposals may be submitted in any format desired. Printed and electronic versions are encouraged. The proposal should include the following information:

- Name and background of the developer and its principals
- Executive Summary of Proposal
- Outline of development experience and financial capabilities
- Vision for the project addressed within context of City's vision
- Proposed project team
- Anticipated timeline for plan development and construction
- Incentives required to undertake the project

Applicants are requested to include any public financial information that it is willing to provide. Additionally, Applicants are encouraged to identify any other partners or participants that are anticipated to work on the project, such as architect, site planner, or general contractor.

Proposals must be submitted no later than January 26 at 3 pm. They should be sent to City Manager, 111 West Vine St, Murfreesboro, TN 37129 and by email to rlions@murfreesborotn.gov .



PROPOSALS (cont'd)

Applicants must demonstrate a strong track record of successful mixed use projects, urban redevelopment, and the ability to secure the equity and financing necessary to complete the project in a timely manner. Experience with urban redevelopment and integration of historic structures would be beneficial.

Review by City staff and its Gateway Commission will begin shortly thereafter. Proposals that are determined to be feasible and consistent with the City's vision will be submitted to City Council for consideration. A tentative time for review and consideration is shown in Timeline 2.

Please note that all Proposals will be public records and open for review, reproduction, and public dissemination. Submission of a proposal to the City will be considered understanding and acceptance of this legal requirement.

The City reserves the right to reject all proposals and reopen the process, request additional information of all or any submitters, close the process, or cancel the process at any time.

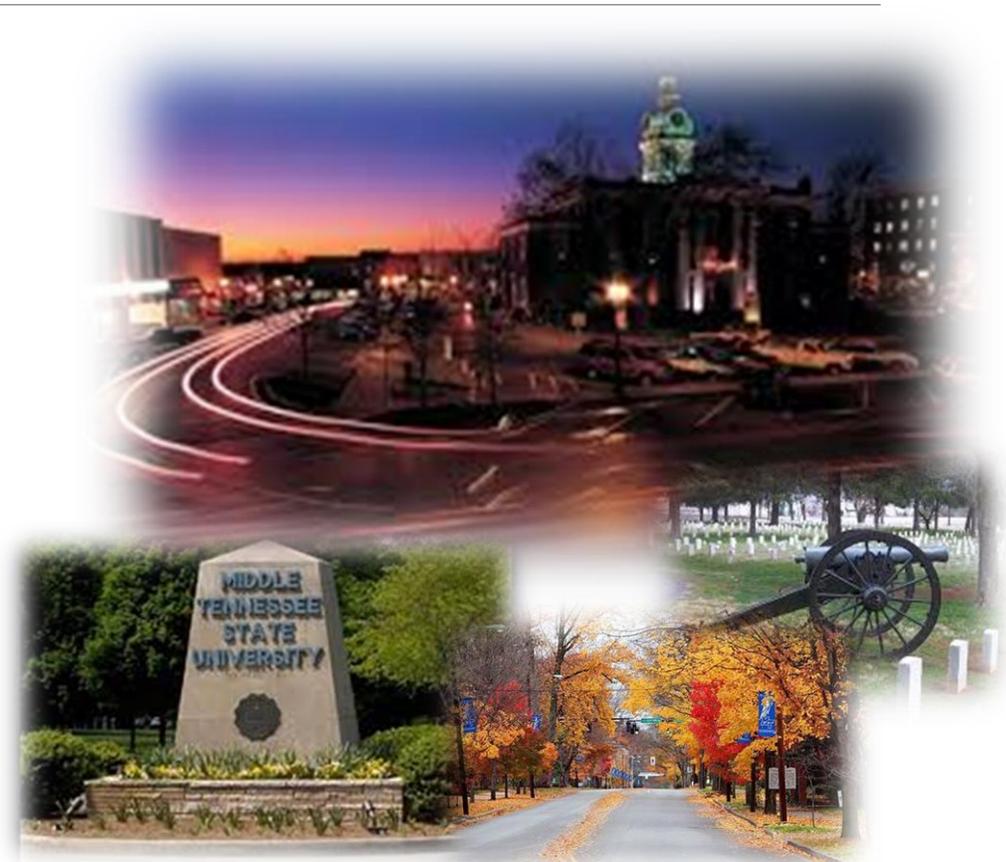


INTRODUCTION

The City of Murfreesboro is inviting experienced developers to submit proposals for redevelopment of a full city block, approximately three acres, located directly adjacent to the City's historic Public Square.

This unique project will be a high profile undertaking and its location assures that it will have a major impact on the City's downtown landscape and future development. The project offers the developer an outstanding opportunity to complete a signature development in one of the fastest growing communities in the nation and directly in the heart of Tennessee.

The project site is currently owned by the City and all parcels within the block are fully assembled and ready to be transferred. The City is fully committed to fostering the highest quality of development that will enhance the downtown and surrounding community and is willing to discuss appropriate financial incentives designed to assure the project's goals are timely achieved.



THE VISION

Community input and Council discussions clearly reflect a strong desire that development of the site serve as a signature project for the future of downtown and the surrounding area.

To that end, there is a desire for a creative mixed-use project on the site that may include retail, office, and residential elements. Most of the year, regular evening events pack the Public Square only a few steps from the project site. Franklin Synergy Bank, the current tenant, has expressed an interest in maintaining a presence on the site, and the demand for downtown residences is voiced weekly.

The interest and excitement surrounding the future of the site requires an innovative developer willing to partner with the community to create an entirely new future around a highly visible location in the center of a vibrant, growing community.



THE VISION (cont'd)

Building height limitations have not been established and are subject to further discussions. As a reference, one block from the site Rutherford County is constructing a new six story Judicial Center. The City Center Building, located on opposite side of the Public Square from the site, is 16 stories tall.

While seeking creativity and innovation, proposals must also recognize the historic aspects of the property and the downtown area. The historic church, although not on any historic registry, is a city landmark and located one block from the City's Historic District. The church's bell tower is visible from some distance on major arterial roadways leading into the Public Square. Therefore, there is a requirement that the bell tower be preserved and incorporated into the project design. There is also a strong preference to repurpose the original sanctuary building; however, consideration will be given to other proposals, such as retaining the façade.

The site is located in dense, urban area. Therefore, parking will need to be integrated in to the design.



THE MARKET

Murfreesboro's population is currently over 126,000, and the City is planning for a projected population of more than 260,000 in its urban area by 2035. Rutherford County is also projected to double during that period to over 500,000 people. Obviously, the area's potential is tremendous and ripe for development of new projects needed to service this growth.

The City is served directly by I-24 and I-840, with easy access to I-40 and I-65, making Murfreesboro a major transportation center. The City's historic antebellum County Courthouse is surrounded by a vibrant public square. In 2014, the average household income was \$68,788, which is 45% above the State's average. Retail sales in Rutherford County exceeded \$6.5 billion in 2015, and over four million square feet of retail space has been added in the last 10 years.

The Murfreesboro area was the 13th fastest growing community in the nation in 2014-15, and 5th in job growth, with an unemployment rate of 4%, which is well below state and national rates. The City's school systems consistently rank among the best in Tennessee, and it is home to Middle Tennessee State University, with over 23,000 students. Major employers in the area include Nissan, State Farm, Amazon, St. Thomas Rutherford Hospital, Bridgestone/Firestone, Asurion, Verizon Wireless, Johnson Controls (now Adeient), Taylor Farms, and Ingram Book Co.



THE PROJECT SITE

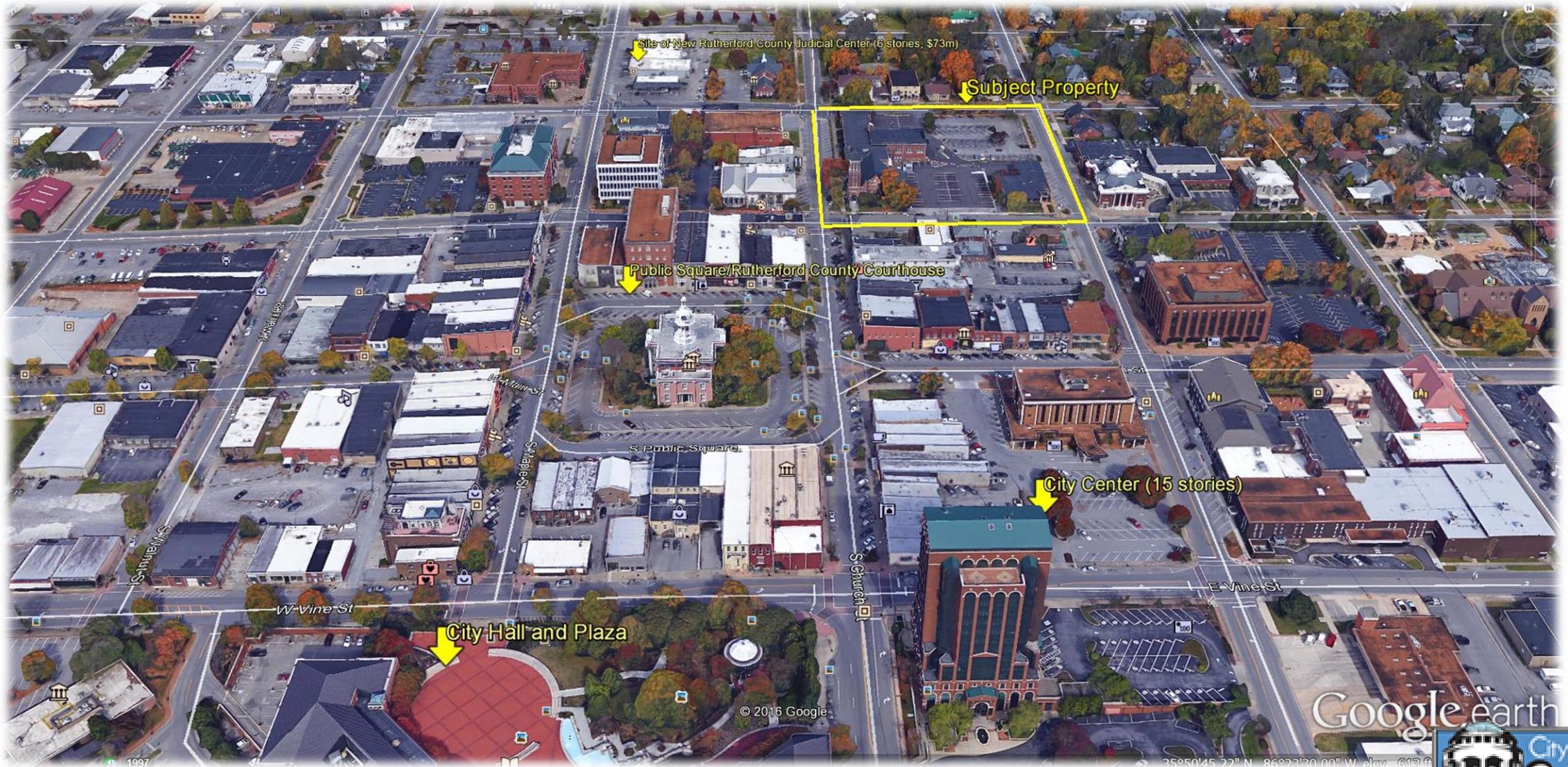
The project site is owned free and clear by the City. It encompasses a full city block just off the historic public square and is bordered on all sides by two-way arterial streets. [Aerial 1](#) provides a view of the downtown area.

Access to the site will be enhanced upon completion of two nearby major roadway improvements. These are shown on Maps 1 and 2. The state is building a bridge over the intersection of Broad Street (US-41) and Memorial Blvd (US-231). This project is scheduled for completion by December 2017. The City is also enhancing downtown access from Broad Street directly to the project site with the reconstruction of Lytle Street. This latter project will foster redevelopment of the properties west of the project site.

[Aerial 2](#) shows the site, which is approximately three level acres. A 19th century church tower and sanctuary is located in the southwest quadrant. While important to the community, these buildings are not designated historic landmarks. Nevertheless, the City desires to preserve the tower and, if possible, repurpose the sanctuary. The education buildings that fill the western portion of the site, as well as the small building located in southeast quadrant, hold no historic significance.



Aerial 1 Surrounding Area



Aerial 2 Existing Conditions



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THE PROJECT SITE (cont'd)

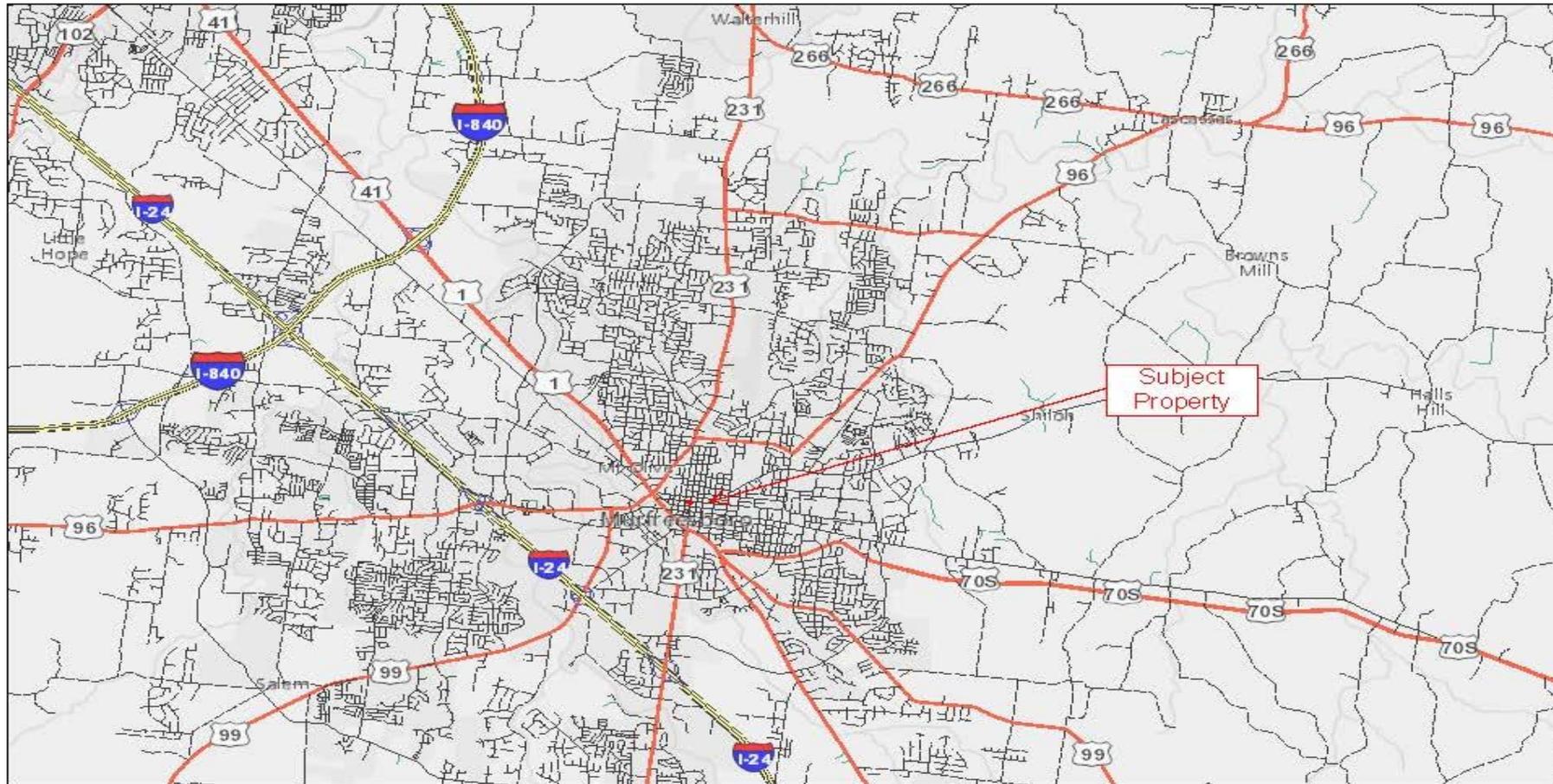
There are no major easements or encumbrances that would impede significant development of the property. It is served by City utilities and has excellent transportation access. [Map 1](#) shows the major transportation corridors and [Map 2](#) provides an overview of the Downtown area.

Currently, the City's land use plan allows for intensive development of the site. The site is zoned for General Office and Residential. The City will consider rezoning the site to accommodate a planned or mixed use development. [Timeline 1](#) reflects the process and approximate timeline for rezoning. Preliminarily, proposals will be reviewed by the City's Gateway Commission, which was established to review plans within the [Murfreesboro Gateway](#) mixed-use development corridor from I-24. Recommendations from the Commission will go to the Planning Commission and then City Council.

After acceptance of a proposal, City staff will begin working with the developer to prepare the appropriate rezoning request. All zoning requests are, however, subject to Planning Commission and City Council approval.

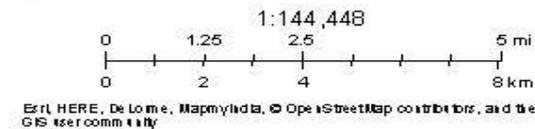


Map 1 Major Transportation Corridors



October 26, 2016

Street Centerline		Ferry	Local	Other	Resource
4WD	Interstate		Major Arterial	Ramp	Service
Collector	Highway		Minor Arterial	Recreation	Unknown



IT Department
ESRI



Map 2 Downtown Area

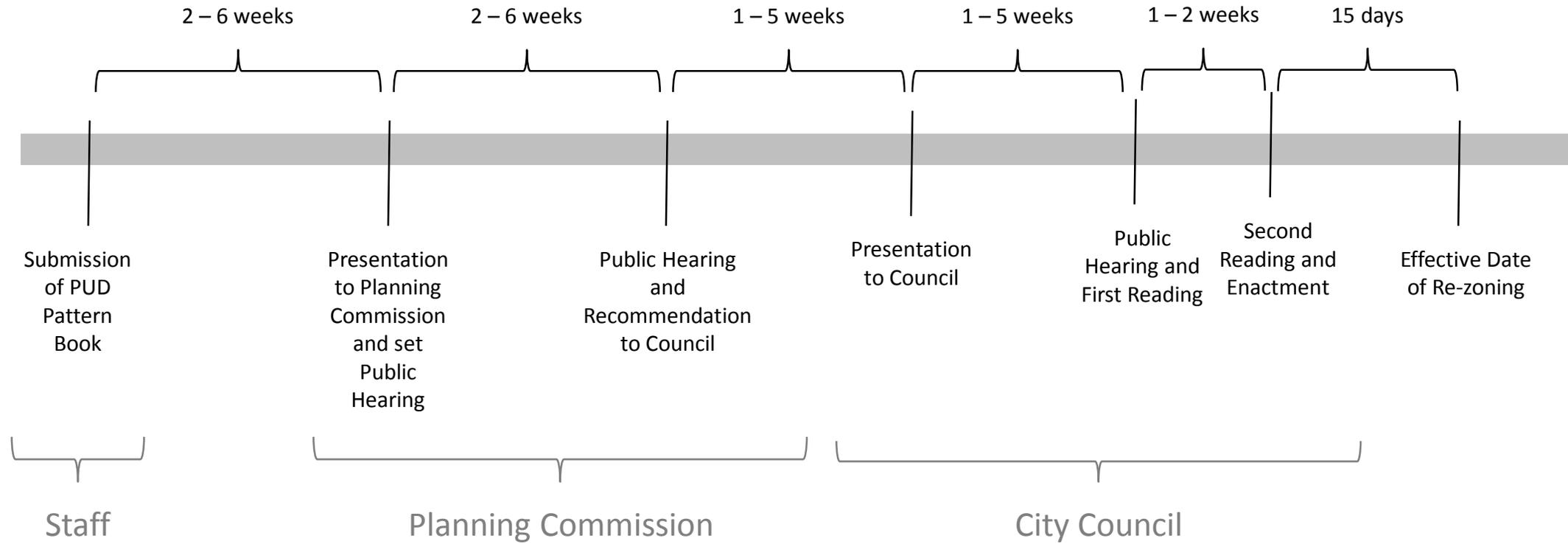


Neighborhood Analysis

- | | | | |
|--|-----------------------|--|--------------------------|
| | SF Residential | | Park |
| | MF Residential | | 1/4 mile Park Radii |
| | Section 8 Voucher | | Vacant Land |
| | Public Housing | | Agriculture / Open Space |
| | Commercial | | Floodplain / Water |
| | Grocery Store | | Bike Lane |
| | Civic | | Sidewalk |
| | School | | Greenway |
| | 1/2 mile School Radii | | City of Murfreesboro |
| | | | Rutherford County Land |



Timeline 1 Typical Re-zoning Timeline – Planned Unit Development



Note: All times are estimated and will be impacted by Applicant’s responsiveness to staff, Planning Commission, City Council requests. Applicant will be expected to work with the community in the area impacted by the proposed development, which may alter the timeline. Commission and Council meetings are subject to adjustment for holidays and other events. Council may require changes before or after first reading and such changes may require a new public hearing or referral back to the Planning Commission.



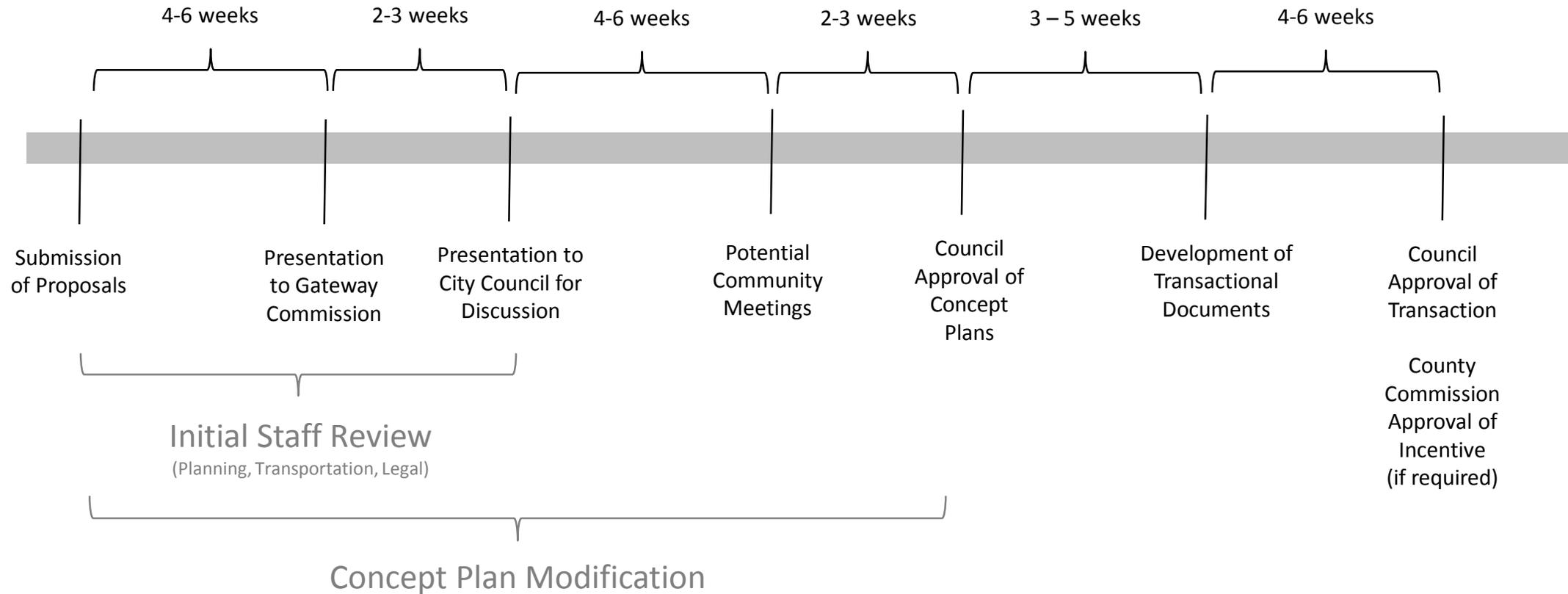
INCENTIVES

The City is prepared to consider appropriate incentives that may be beneficial to realization of the community's vision for the Site. Incentives will be performance based and tied to the timely success of the project.

Incentives may include pricing of the site, tax increment financing, or participation in infrastructure enhancement, among other potential project enhancements. Proposals should reflect the anticipated net present value of a proposed incentive that may be required. The City Council and perhaps the County Commission, must approve any incentive prior to any commitment or reliance thereon.



Timeline 2: Anticipated Review Timeline



Note: Anticipated steps may change. As with the Rezoning Timeline, all times are estimated and will be impacted by Applicant’s responsiveness to staff, Planning Commission, City Council requests. Applicant will be expected to work with the community in the area impacted by the proposed development, which may alter the timeline. Commission and Council meetings are subject to adjustment for holidays and other events. Council may require changes before or after first reading and such changes may require a new public hearing or referral back to the Planning Commission.



CITY OF MURFREESBORO

HISTORIC BOTTOMS

PLANNING STUDY

DECEMBER 1ST, 2016

DRAFT

Cannonsburgh Village

RAGAN SMITH

ACKNOWLEDGMENTS



In developing the Historic Bottoms Planning Study, the Ragan-Smith, Common Ground, Sterling Communications, and Randall Gross Development Economics team worked closely with City of Murfreesboro Officials and members of the Steering Committee. This plan could not have been possible without the time and efforts put forth by the following:



Randall Gross
Development
Economics



Steering Committee Members:

- John Harney
- Ron Washington
- Doug Cook
- Dale Robertson
- Gloria Christy
- Scott Foster
- Dave Baughman
- Tara MacDougall
- Ryan Maloney
- Paul Latture
- Chase Salas
- Lee "Ozzy" Nelson
- Sean Gilliland

City Staff Members:

Administration:

- Rob Lyons, City Manager
- Jennifer Moody, Assistant City Manager

Planning & Zoning:

- Gary Whitaker, Planning Director
- Matthew Blomeley, Asst. Planning Director
- Donald Anthony, Principal Planner

Community Development:

- John Callow, Director

Police:

- Eric Cook, Asst. Chief

Building & Codes:

- Robert Holtz, Director

Engineering:

- Katie Noel, Project Manager
- Chris Griffith, City Engineer
- Sam Huddleston, Asst. City Engineer

Parks & Recreation:

- Angela Jackson, Acting Director
- Pam Williams, Cultural Arts Coordinator
- Nate Williams, Programs Director

Water & Sewer:

- Darren Gore, Director

Transportation:

- Jim Kerr, Director
- Ram Balachandran, Traffic Engineer



Project Background		Inventory & Analysis		Strategic Development Plan		Implementation Recommendations	
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The City of Murfreesboro has recognized the importance of the Historic Bottoms in shaping its future. The primary goal of the study is to “Present possible land use patterns and development scenarios that will create a plan for future growth, create a positive sense of place, connect the surrounding community, and increase economic vitality, while preserving the historic fabric of the study area. The Murfreesboro 2035 Plan “Our Future Begins Now” suggests planning and master plan studies for specific areas like the Historic Bottoms. The first step in developing the Historic Bottoms Planning Study was to establish the key goals and objectives for the study itself. It was decided that the key goals and objectives are as follows:

Economic Growth and Development:

- *Determine existing and future market potentials for retail, office, and residential land uses in the study area and to strengthen the relationship between the Historic Bottoms and Downtown Murfreesboro. Provide an economic overview of the study area to evaluate potential market recommendations and reflect the recommendations in proposed land use patterns and development scenarios.*

A Clear Pattern to Establish Future Land Use:

- *Map a clear plan to shape specific land use patterns in the study area. Potential development scenarios along with precedent imagery will be established to help visualize how future growth and development might function and feel.*

A Strong Plan to Preserve Community Character:

- *Establishing design objectives that protect and enhance the quality of life for Murfreesboro residents and encourage visitors to return. Tap into existing historical, cultural, & environmental assets to strengthen the sense of community character.*

Planning for Good Transportation, Utility, & Environmental Infrastructure Needs:

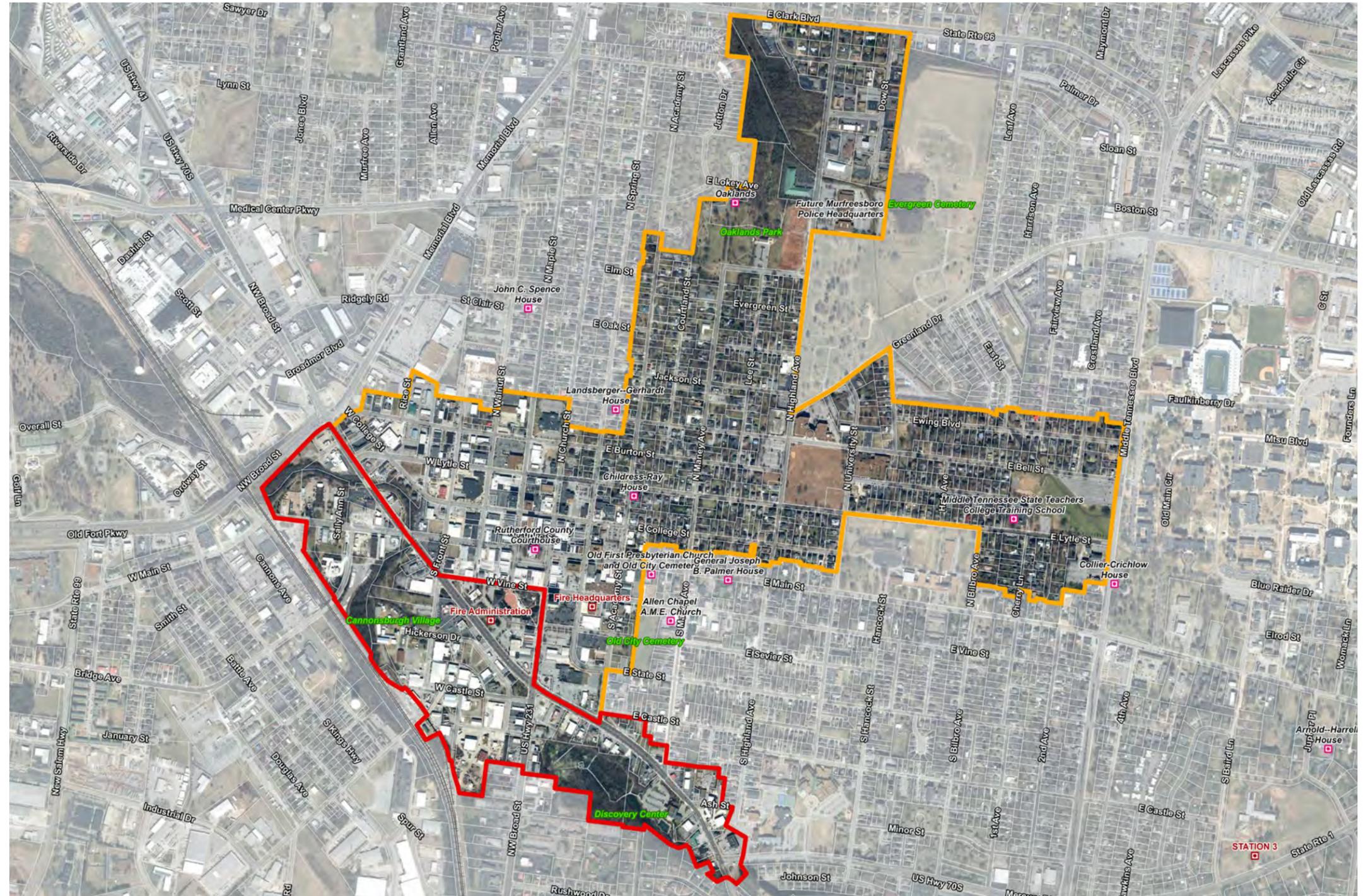
- *Anticipate the impact of redevelopment, establish a clear plan for addressing pedestrian connectivity, streetscape character, connecting to the surrounding community, and to make provisions to expand existing infrastructure to accommodate future growth in the study area.*



The Bottoms has a prominent history in Murfreesboro for its role as an African American neighborhood and for the industries associated with the railroad. During the Reconstruction era in almost every town where slavery existed, former slaves went looking for employment and shelter. Most were in extreme poverty and it came to be that any place shelter could be fabricated, it was. In a lower income neighborhood made up of roughly 20 blocks consisting of about 55 acres that bordered the south-west side of Downtown Murfreesboro, the Historic Bottoms developed. This area became known simply as the Bottoms because of its low lying terrain that was consistently flooded by rising water from Lytle Creek. Home to blue-collar, service workers and, in some out-skirted areas, some professionals and property owners. The area was predominantly African American but some white residents also lived in the vicinity. Additionally, light industrial operations and warehouses were also located in the area. Living conditions were difficult and unsanitary with no running water or plumbing, little or no electricity and nominal heating. These conditions would continue thru to the 1950's when the area went through a phase of urban renewal, triggered by the National Housing Act of 1949 and the funding of a major highway project U.S. Route 41 to connect Murfreesboro to the surrounding communities to the north and the south. U.S. Route 41 became a part of the Dixie Highway, which was a major national travel route that connected Miami, Florida in the south, to the Canadian border in the north. The historical black and working class neighborhoods were demolished and displaced in the process of this urban renewal effort. This diagonal swath of the new U.S. Route 41 cut through the heart of the Murfreesboro Downtown grid, creating a division between Downtown and the Historic Bottoms area. The hope of this planning study includes the goal of re-invigorating Downtown Murfreesboro with the Historic Bottoms area.

Project Limits Overview:

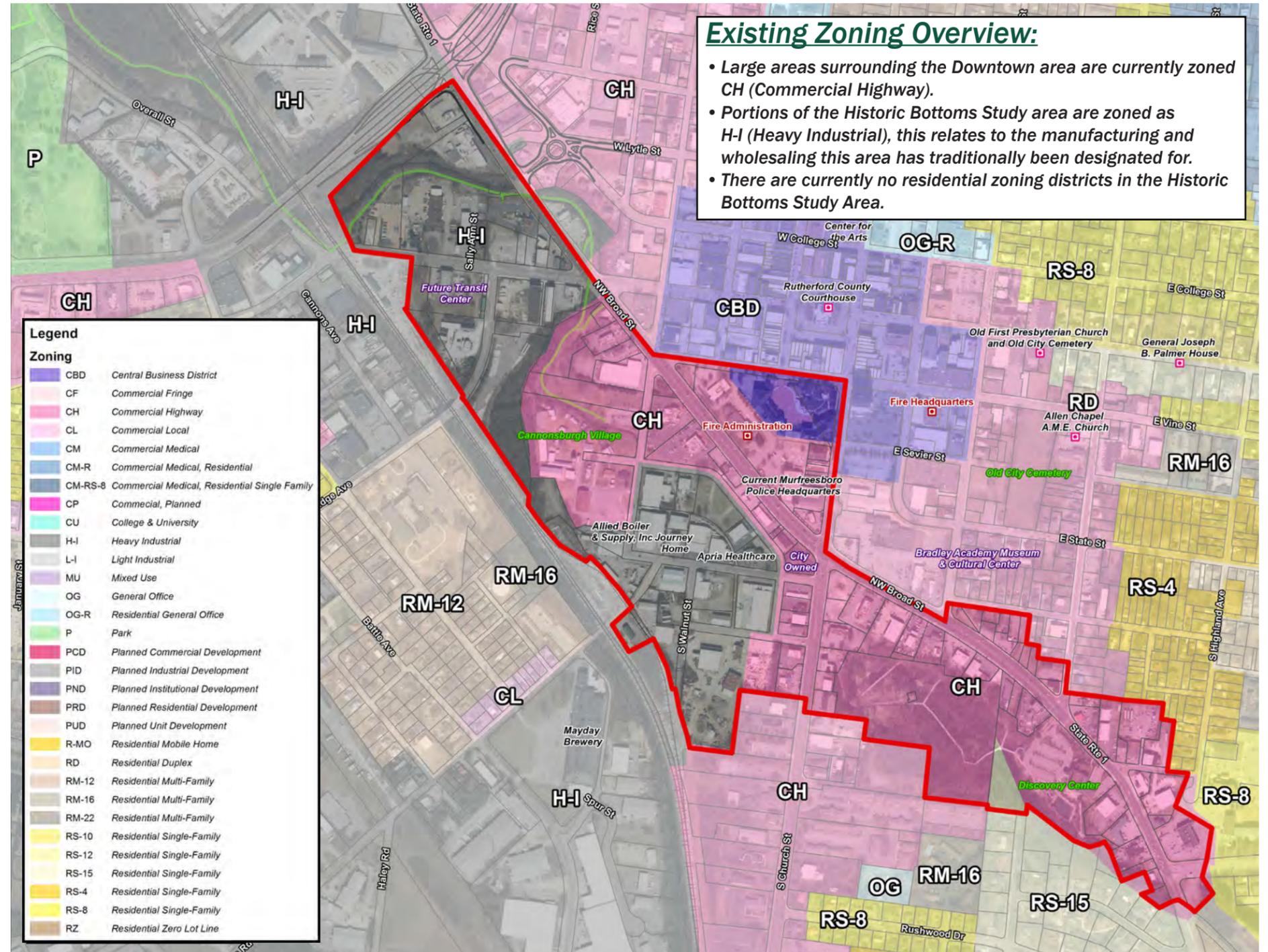
- Bound by Broad Street to the northeast (including City Hall).
- Bound by Memorial Boulevard to the northwest.
- Railroad defines the southwest edge.
- Discovery Center anchors the southeast side at Mercury Boulevard.
- The Historic Bottoms Planning Study area has an adjacent area that also is being studied, the North Highland Avenue Planning Study. The two study areas abut each-other with N. W. Broad Street between them. While the economic market analysis and planning concepts include both study areas together, each study has its own unique aspects highlighted in the findings and recommendations of the plans.
- Many of the concepts examined will overlap between the two study areas.

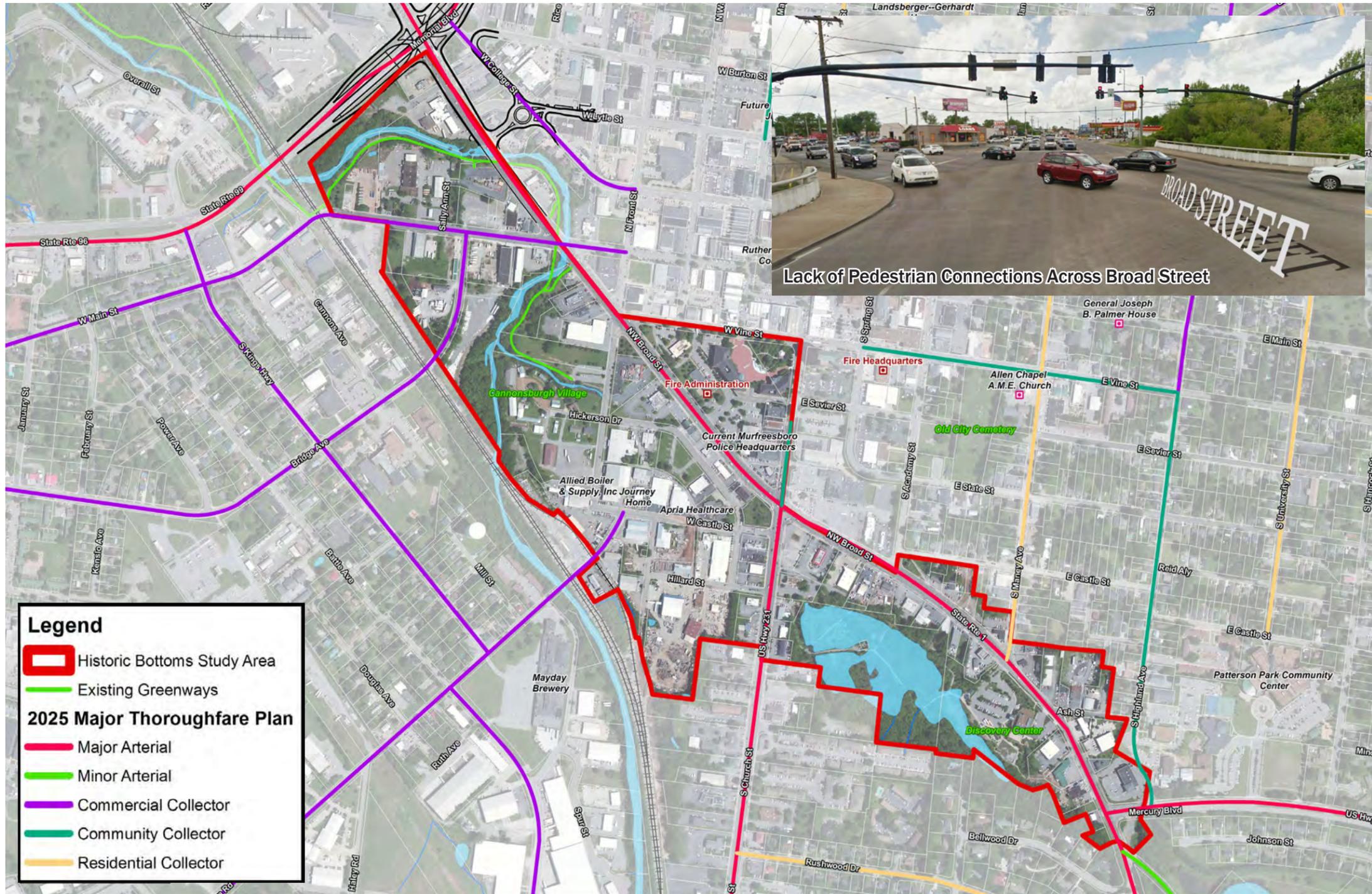


Existing Zoning Description:

Below is a list of the zoning districts that are within the N Highland Study Area along with a formal description of each:

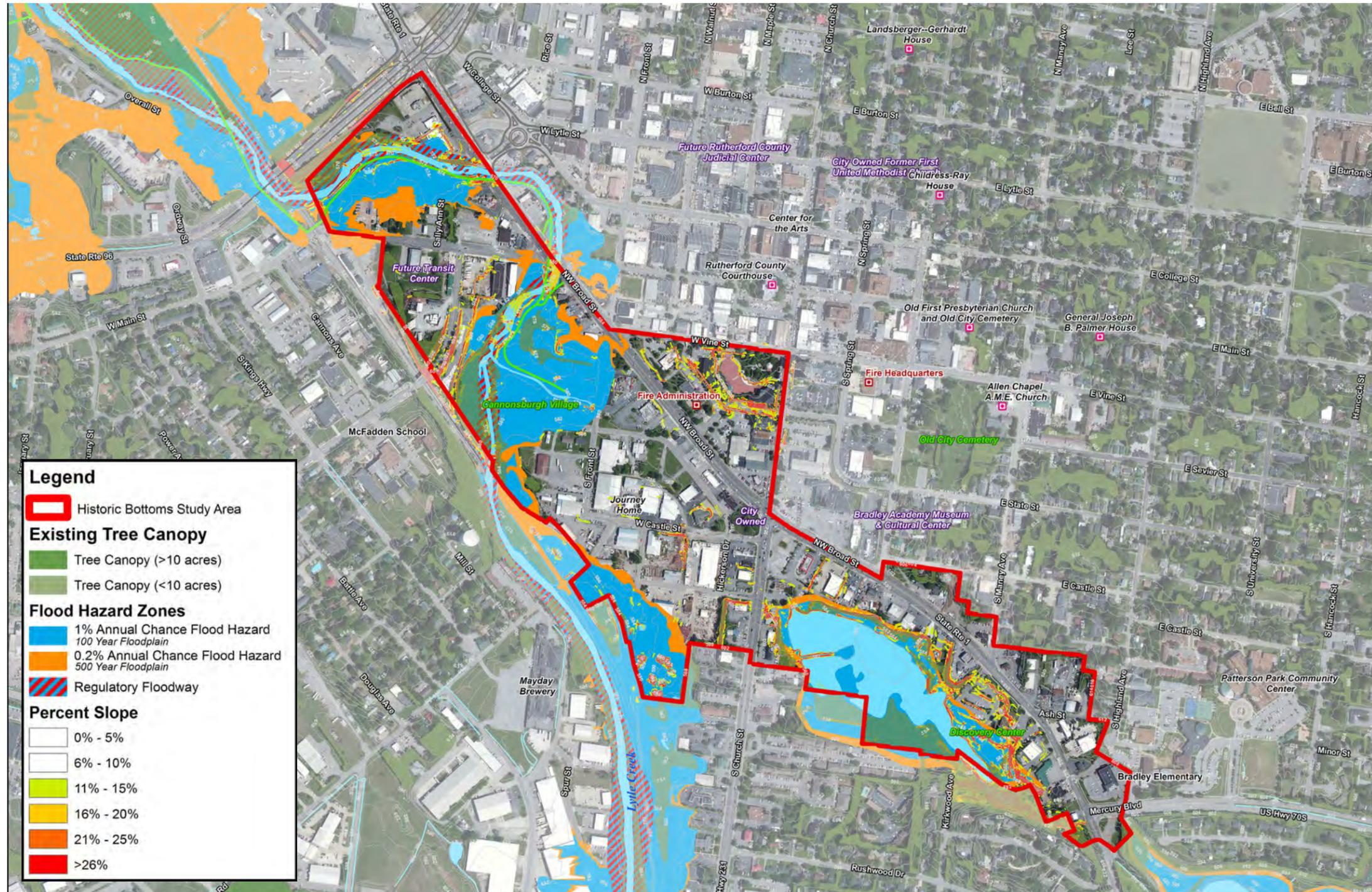
- **CBD** - This district is to provide a zoning category which allows the maintenance and development of use which will reinforce the vitality of the central business district as a residential and employment center and as the commercial, governmental, and cultural center of Murfreesboro.
- **CL** - This district is intended to permit the development and continued maintenance of commercial retail uses and personal services serving the needs of a relatively small area and developed either as a unit or on individual parcels.
- **CH** - This district is intended to permit the development and continued maintenance of general commercial uses located in a linear fashion along highways and near transportation facilities and industrial areas
- **H-I** - This industrial district is intended to provide areas in which the principal uses permitted are manufacturing, wholesaling, or warehousing and which are accessible to major transportation routes.
- **PCD** - Planned Commercial District: Any planned development for a land use, uses, or combination of uses permitted by right or special permit as indicated in the commercial section of Chat 1 (Uses Permitted by Zoning District) in The Murfreesboro Zoning Ordinance.
- **RM-12** - This district is intended to permit the development and maintenance of residential areas characterized by a broad range of residential housing types including single-family, two-family, three-family, four-family and multiple-family dwellings up to three stories in height.
- **RM-16** - This district is intended to permit the development and maintenance of residential areas characterized by a broad range of residential housing types including single and two family dwellings and multiple-family dwellings up to three stories in height.
- **RS-4** - This district is primarily intended to provide continued maintenance of single-family lots of four thousand square feet in area in the existing older parts of the City.
- **RS-8** - This district is intended to permit the development and continued maintenance of single family residential areas characterized by relatively low overall density with lots of at least eight thousand square feet per dwelling unit.
- **RS-10** - This district is intended to permit the development and continued maintenance of single-family residential areas characterized by relatively low overall density with lots of at least ten thousand square feet per dwelling unit.
- **RS-15** - This district is intended to permit the development and continued maintenance of single family residential areas characterized by relatively low overall density with lots of at least fifteen thousand square feet per dwelling unit.
- **OG-R** - This district is intended to permit offices and associated administrative, executive, and professional uses, and residential uses and specified institutional and limited retail commercial uses.





Transportation Overview:

- The volume and traffic on Broad Street is a major barrier to pedestrian crossings.
- Lytle Street roundabout will change access opportunities into Downtown.
- Memorial Boulevard will become an improved overpass with off ramps onto Broad Street.
- A stronger bike and pedestrian connection should be considered
- Current street network on the south side of Broad Street has access limitations, especially with left turns in and out. Street network in the Historic Bottoms should be addressed.
- These road classifications are based on 2025 Major Thoroughfare Plan GIS data as depicted as of September of 2016.

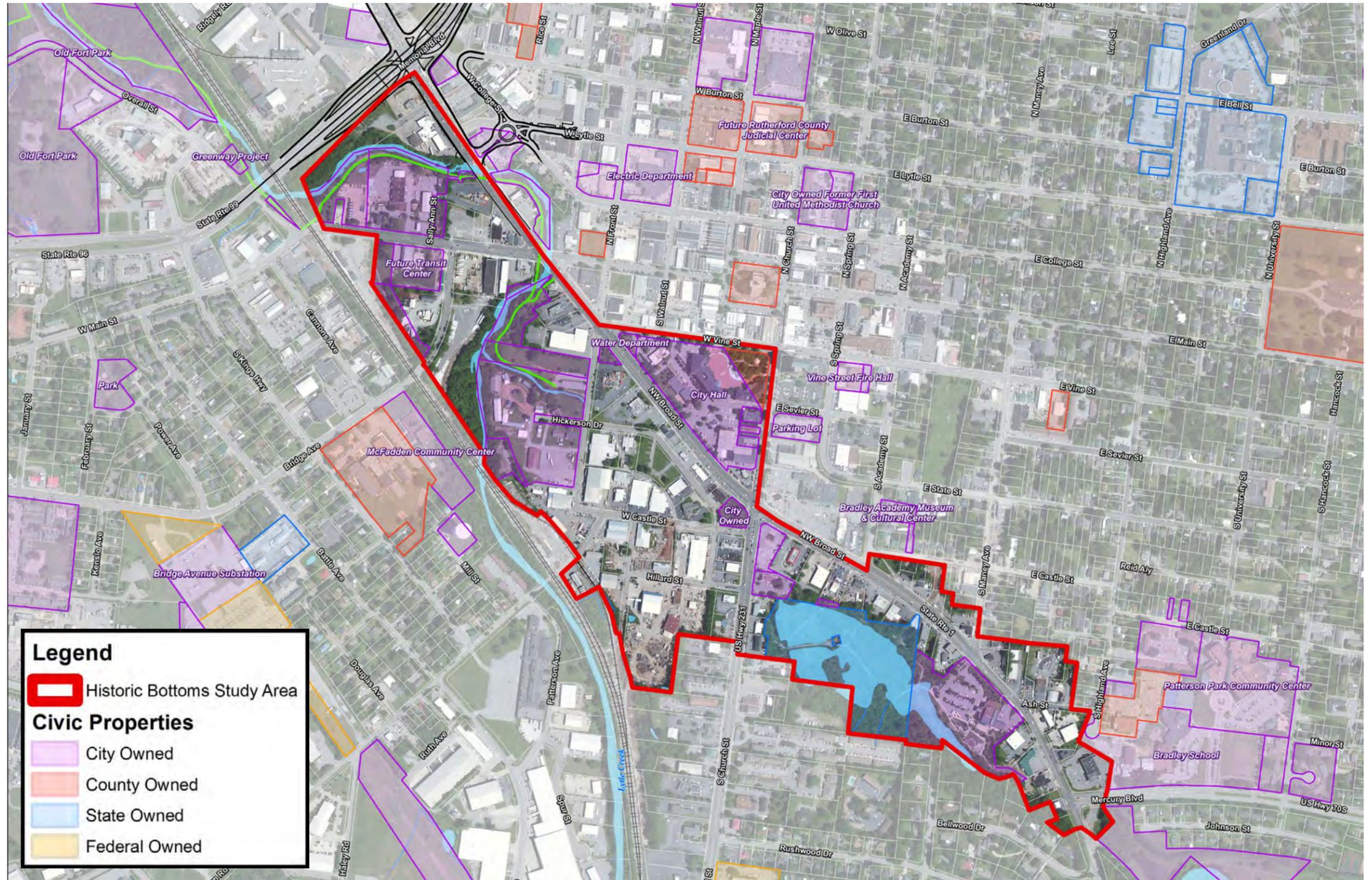


Natural & Cultural Resources Overview:

- Floodway and Floodplain from Lytle Creek is a major impact
- Major events occur (such as Uncle Dave Macon Days) at Cannonburgh. More events are planned with the incorporation of permanent outdoor stage
- Connections from the square to Cannonburgh and the Discovery Center need to be improved
- The Bradley Museum and related African American History should be emphasized as part of the cultural opportunities for both the N. Highland Ave. Study and the adjoining Historic Bottoms Study area
- Explore the possibility of “Daylighting” Town Creek and extending the Lytle Creek Greenway to the Discovery Center.
- Connect natural and cultural resources with pedestrian routes

City Owned Property:

- The City of Murfreesboro owns a significant portion of the Historic Bottoms Study Area. Many of the properties like City Hall, Cannonsburgh, and the Discovery Center are important to the character of the area.
- There are also several parcels that are vacant or under utilized that the City of Murfreesboro owns that are prime for future development.
- Additionally, the City of Murfreesboro has plans for a future transit center located on Main Street.





Industry	2009		2015		2009-2015 Change	
	Number	Percent	Number	Percent	Number	Per Year
Mining/Constructn	3,471		4,252		781	3.2%
Manufacturing	17,942		25,273		7,331	5.8%
Utilities	291		733		442	21.7%
Wholesale	4,986		5,406		420	1.2%
Retail	11,359		13,963		2,604	3.3%
Transport/Whse	3,791		5,455		1,664	6.3%
Information	2,997		2,686		(311)	-1.5%
Finance/Insurance	2,965		3,565		600	2.9%
Real Estate	1,024		1,356		332	4.6%
Prof/Tech Svcs	2,155		2,659		504	3.3%
Mgt Svcs	785		903		118	2.1%
Admin Support	8,004		10,164		2,160	3.9%
Education	487		664		177	5.2%
Health Care	7,889		13,401		5,512	10.0%
Accom/FS	8,810		12,369		3,559	5.8%
Arts/Entertainment	704		905		201	4.1%
Other Svcs	1,839		2,062		223	1.7%
Govt/Education	13,167		16,623		3,456	3.7%
TOTAL	92,666		122,439		29,773	4.6%
Note:	Non-farm employment only.					
Sources	Tennessee Department of Labor and Workforce Development and Randall Gross / Development Economics.					

Murfreesboro and Rutherford County form part of the vibrant Nashville-area economic base. Rutherford County is among the fastest-growing job markets in the country, with the U.S. Bureau of Labor Statistics ranking Rutherford fourth out of 3,144 counties nationwide in job growth from 2015 to 2016. That job growth has been accelerating, with the county's overall employment base up by one-third in only six years (for an average growth of 4.5% per year), as compared with a growth rate of 1.5% from 2000 to 2010.

Rutherford County has seen rapid job growth in nearly all sectors, especially in manufacturing, health care, accommodation services, education, administrative services, retail trade, and transportation services.

The City of Murfreesboro has also experienced rapid economic growth in recent years, with employment up by 5.5% per year on average since 2002. Much of that growth has been concentrated in health care services, accommodation, retail trade, and information services. The City and County have worked pro-actively to encourage growth such as through the establishment of the new Gateway medical and corporate node.

While the City and County are experiencing unprecedented economic growth, population and household growth are actually slowing in both the city and the county. Between 2000 and 2010, the city experienced annual population growth of 5.8%, but that growth rate fell to only 2.8% per year between 2010 and 2014, according to Census data. Similarly, the county's annual population growth rate fell from 4.4% (2000-2010) to 2.5% (2010-2014).

Some of this shift in growth is healthy, in that Murfreesboro and Rutherford County residents have an increasing array of job opportunities near home, and new commercial and industrial development helps support their tax base. On the other hand, slower household growth can translate into static labor force growth, which could put the brakes on economic expansion.

A Market Analysis was conducted to determine the potential of the North Highland & Historic Bottoms areas for office development. The complete findings from the market analysis are found in the Appendix report attached to this plan.

Existing:

Sub-Market	Total SF	Occupied	Vacant	Vac Rate	Ave Rent	Ave Age
NW/Northfield	463,676	403,848	59,828	12.9%	\$ 14.98	1995
Gateway/Medical Ctr	903,018	652,498	250,520	27.7%	\$ 19.17	2008
West Murfreesboro	83,281	69,932	13,349	16.0%	\$ 15.93	2004
Southeast	99,010	75,560	23,450	23.7%	\$ 14.56	1996
CBD / Highland Area	1,160,542	743,058	417,484	36.0%	\$ 13.02	1952
Smyrna	172,616	100,498	72,118	41.8%	\$ 14.36	2002
TOTAL	2,882,143	2,045,395	836,749	29.0%	\$ 16.03	1982
Notes:	Based on detailed CBD inventory plus market listings for sub-markets. Includes downtown space that is functionally obsolete or otherwise non-Competitive. Excludes Government offices.					
Sources:	Rutherford County Assessor, Commercial Brokers, LoopNet, web sites, Main Street, and Randall Gross / Development Economics.					

Existing Market Conditions:

The Murfreesboro-Smyrna Office Market was inventoried and analyzed for this planning effort. It was determined that this market has about 2.9 million square feet of competitive multi-tenant office space. There are six sub-markets that were identified and defined for this study. The largest of these sub-markets is the Downtown Murfreesboro/Highland Area, which has about 1.2 million square feet of office space. Nearly 420,000 square feet or 36.0% of this space is vacant, based on data collected through the County Assessor, field reconnaissance, and brokers. The inventory excludes Government offices.

Downtown-area rents are averaging about \$13.00 per square foot, which is the lowest among all sub-markets in the Murfreesboro-Smyrna area. The overall average rent is \$16.00 per foot. Much of the downtown space is functionally obsolete or otherwise non-competitive. The average downtown building was built in 1952 and is over 64 years old. This compares with the market average of 34 years (built in 1982) and with Gateway buildings built on average in 2008. Not surprisingly, Gateway rents are much higher, at nearly \$20.00 per square foot. Vacancy in Gateway buildings is also relatively high, but only because many are newer buildings still in lease-up.

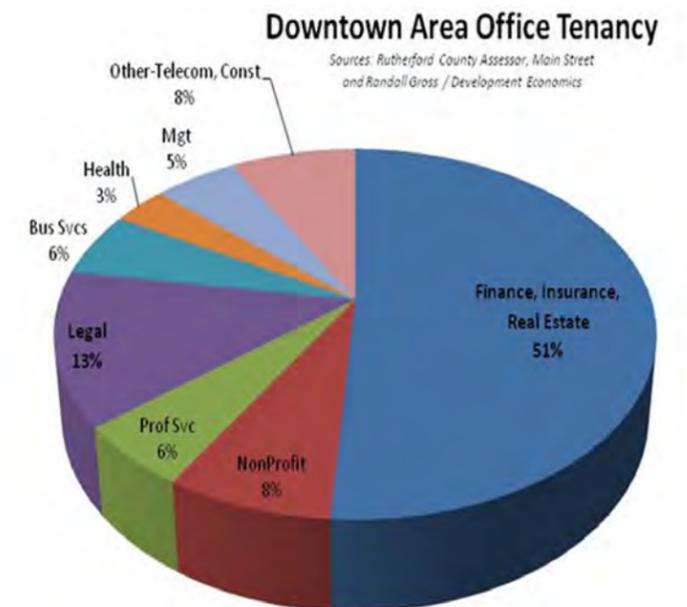
Downtown-area office tenants tend to be oriented to finance, insurance and real estate (FIRE), accounting for more than half of the total. However, law firms also comprise a substantial share (12%) of downtown space and tend to take up ground-floor retail spaces.

Potentials:

Factor	Office Potentials in Square Feet		
	2016-2021	2021-2025	TOTAL
Employment-Driven Demand	367,601	322,754	690,354
Absorption-Based Demand	300,500	332,778	633,278
Average	334,000	328,000	662,000
Historic Performance	15.9%	15.9%	15.9%
Expected Capture	53,000	52,000	105,000
Target Potentials	21.5%	30.9%	26.1%
Targeted Capture	71,500	101,500	173,000
Source:	Randall Gross / Development Economics.		

Downtown/Highland Office Potentials:

The market analysis forecasted potential for development of about 170,000 to 200,000 square feet of new office space within the competitive market. These forecasts were completed based on analysis of employment and industry sector projections, absorption trends, emerging labor force, and competitive positioning in the market. Despite the high vacancy in existing space, downtown has very little Class A office space available to attract or recruit the types of companies that are driving demand in the area. Key target tenants for this space would be move-ups among FIRE and legal firms; but also companies with young workers including administrative services & business process outsourcing, business & professional services, and management services (including headquarters offices).





The residential market potentials for the Downtown / North Highland & Historic Bottoms Areas were forecasted based on analysis of demographic forecasts among various niche markets including university-related drivers, housing market conditions, and competitive context. The demand for different types of housing products and price ranges was forecasted as a basis for housing recommendations in the plan.

Existing Conditions:

Sub-Market	Units	Vacant	Rate	Ave Rent	Units UC
Murfreesboro	10,027	460	4.6%	\$ 1,019	1,056
Smyrna/Lvn	3,449	280	8.1%	\$ 933	24
TOTAL/Ave Market	13,476	740	5.5%	\$ 997	1,080
Market	87,284	4,730	5.4%	\$ 1,050	14,741
Share	15.4%	15.6%	101.3%	95.0%	7.3%
Sources:	Real Data and Randall Gross / Development Economics.				



Potentials:

Rent Range	Area Capture		Market Rate
	Moderate	High	
\$ 200	75	93	-
\$ 400	55	78	-
\$ 600	48	77	-
\$ 900	68	122	95
\$ 1,300	85	164	124
\$ 1,800	44	90	67
\$ 2,300	29	70	49
\$ 3,000	32	104	68
TOTAL	375	625	220
Workforce	177	249	
Sources:	U.S. Bureau of the Census; Nielsen; and Randall Gross / Development Economics.		

Price Point	Area Capture		Market Rate
	Moderate	High	
\$ 106,250	11	13	-
\$ 156,250	27	38	-
\$ 218,750	44	73	58
\$ 281,250	23	46	35
\$ 343,750	7	16	11
\$ 437,500	27	134	80
TOTAL	138	321	105
Sources:	U.S. Bureau of the Census; Nielsen; and Randall Gross / Development Economics.		

Existing Market Conditions:

The combined Murfreesboro/Smyrna-Lavergne (M/SL) housing market has about 14,000 rental housing units in competitive properties throughout the area. This inventory constitutes about 15.4% of the overall Nashville-area rental housing market. There are about 740 vacant rental housing units in the M/SL market, yielding a healthy vacancy rate of 5.5%. This vacancy is relatively consistent with the market as a whole. Rents, however, tend to be lower in the M/SL market than in other parts of Nashville, with an average of \$997 versus \$1,050 market-wide.

More importantly, the M/SL market only has about 1,080 units currently planned or under construction, which constitutes just over 7.0% of the Nashville-area market or about one-half of the expected number (if based on overall inventory). The lack of multi-family housing construction in the Murfreesboro market suggests a shortfall in meeting current market demand, given the rapid increase in employment within this same market. In general, employment growth fuels demand for rental housing, since many professionals and other workers settle in rental housing first before moving up to purchase housing.

Both the number of housing units sold and the median sale price have been increasing in Murfreesboro. The number of sales fluctuates with the seasons but has increased year-on-year since the end of the recession. Median prices have increased on average from about \$150,000 in January 2013 to \$220,000 by April 2016, an increase of nearly 50% in just three years.

Downtown/Highland Housing Potentials:

The market analysis forecasted potential for both rental and for-sale housing products in the Downtown / North Highland & Historic Bottoms areas. Total demand for up to about 625 rental housing units was forecasted through 2021 for the study area. However, a substantial share of this demand would be generated by households with less than the median household income for Rutherford County. Thus, demand for up to about 250 "workforce" housing units was forecasted as a share of the total demand. Demand was forecasted by rent range, based on the amount of housing that would be affordable for each income level. The largest share of market-rate rental units would be generated in the \$900 to \$1,300 rent range.

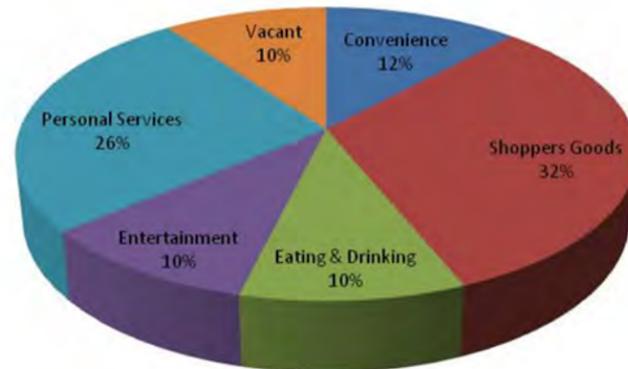
Similarly, potential for up to about 320 for-sale housing units was forecasted for the study area through 2021. This number also includes workforce housing. Demand for about 100 to 125 market-rate units would be generated within the near term. Demand was forecasted by price point, with market-rate prices ranging from about \$218,000 to \$437,000.

A retail market analysis was conducted to determine the existing and future potential for retail businesses and development in the Downtown/North Highland & Historic Bottoms Areas. Key findings are summarized below and detailed in the Appendix Report.

Existing Conditions:

Existing Study Area Retail Business Inventory by Type

Sources: Rutherford County Assessor, Businesses, and Randall Gross / Development Economics



Existing Retail Conditions:

The Downtown / North Highland & Historic Bottoms Areas has about 440,000 square feet of existing retail use in 140 businesses, including 140,000 square feet in shopper's goods (products for which consumers comparison shop), 114,000 square feet in 51 personal service establishments (hair and nail salons, tattoo parlors, etc), 52,000 square feet in convenience uses, 44,000 square feet in entertainment, and 44,000 square feet in eating and drinking establishments.

The Square has significant office use (lawyers and government offices) in ground-floor spaces, reducing overall pedestrian activity and consumer exposure in Murfreesboro's prime commercial node. Interviews with various businesses indicate that sales are increasing, albeit slowly, but they are looking for more destination appeal beyond their traditional market base. Several long-time businesses survive based on a dependence on aging but loyal customers. It's difficult for one or two restaurants or specialty shops to survive without being part of a larger cluster of businesses that establishes Downtown as a destination. There is some new excitement on the Square, with the opening of new restaurants including a local Puckett's, an ice cream shop and game business.

About 44,000 square feet of retail space is currently vacant in the area, yielding a vacancy rate of 10.0%. This vacancy rate is relatively high for centrally-managed retail shopping centers, but for disperse retail space located in older and sometimes functionally obsolete buildings, a higher vacancy is not unexpected.

Potentials:

Table 1. SUMMARY RETAIL POTENTIAL BY PRIMARY USE STUDY AREAS, MURFREESBORO, 2016-2021

Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2016	2021		
Convenience	108,708	125,395	52,234	73,161
Shoppers Goods	273,763	358,491	139,683	218,808
Eating/Drinking	101,834	128,952	43,933	85,019
Limited Service	32,222	37,323	17,584	19,739
Full Service	53,089	72,593	26,349	46,244
Entertainment	96,147	137,149	44,079	93,070
Personal Services	43,260	52,427	114,349	(61,922)
TOTAL	623,711	802,415	394,277	408,138
Existing Vacant			43,901	
Net New Space				364,236

Source: Randall Gross / Development Economics.

Table 2. RECOMMENDED RETAIL MIX, DOWNTOWN MURFREESBORO, 2021

Type of Business	Square Feet
Multi-Use Entertainment Center	100,000
Full-service Restaurants	32,000
Drinking Places	12,000
Sandwich Shops	8,000
Pharmacies, Cosmetics	18,000
Furniture/Art Galleries/Antiques	12,500
Urban Outfitters/Anthropologie, Kinnucans Nielsc	30,000
Outdoor Sports/Rec/Bike	4,000
Book, Music	9,500
Gift, Antiques, Novelty Stores	15,000
Toy/Hobby Store	10,000
Boutiques	10,000
Smoke/Liquor	7,500
Specialty Food Stores	12,000
Jewelry, Accessories, Shoes	10,000
Office Supply	8,000
Florist	3,500
Expanded Art Supply	5,000
Total	307,000

Downtown/Highland Retail Potentials:

Retail potentials were forecasted for the Downtown / North Highland & Historic Bottoms Areas through 2021 based on an analysis of existing market conditions, demographic forecasts within the retail trade area(s), competitive market conditions, and other factors. It was determined that the Downtown/Highland area will generate potential for about 400,000 square feet of warranted additional retail, restaurant, personal service, and entertainment use within the next five years.

There would be potential for about 219,000 square feet of shopper's goods stores, 93,000 square feet in entertainment, 85,000 square feet of eating and drinking space (including nearly 50,000 square feet in full-service restaurants), and 73,000 square feet of convenience goods space. There will be an oversupply of personal services establishments such as hair and nail salons, at least in the near term.

Recommended Retail Tenant Mix:

Based on the findings of the Market Analysis, a recommended tenant mix is provided to inform broader marketing, management and development strategies explained elsewhere in this plan. The recommended tenant mix includes a target of about 310,000 square feet of net new retail uses, with an emphasis on entertainment (80,000 to 100,000 square feet of entertainment uses), full-service restaurants, and urban-scale general merchandise or department stores that target a young, college-educated niche market (e.g., Urban Outfitters, Anthropologie, etc).

Other target uses include specialty food stores (e.g., ethnic or organic groceries), gifts/antiques and novelties stores, jewelry/accessories and shoe stores, toy & hobby store, women's clothing boutiques, drinking places, pharmacies/cosmetics, home furnishings, outdoor sports & recreation, and other businesses. Overall, the recommended mix of businesses would target a younger professional niche market, college students/graduates, day trippers (from Nashville or surrounding counties), and others.



The planning study was conducted in 4 main phases with the intent of allowing careful analysis of the existing data and identification of key opportunities and constraints followed by the exploration of strategic concepts and the selection and documentation of the best solutions. The 4 main phases of the study include:

1. *Public Input*
2. *Market Analysis*
3. *Land Use Planning Study*
4. *Public Relation Services*

The study was done using a collaborative approach by assembling a project team that included:

- *City of Murfreesboro Staff, Project Steering Committees and Key Community Stakeholders*
- *The Ragan-Smith team of land planners, transportation engineers and landscape architects*
- *Common Ground Urban Design + Planning*
- *Randall Gross / Development Economics*
- *Sterling Communications*

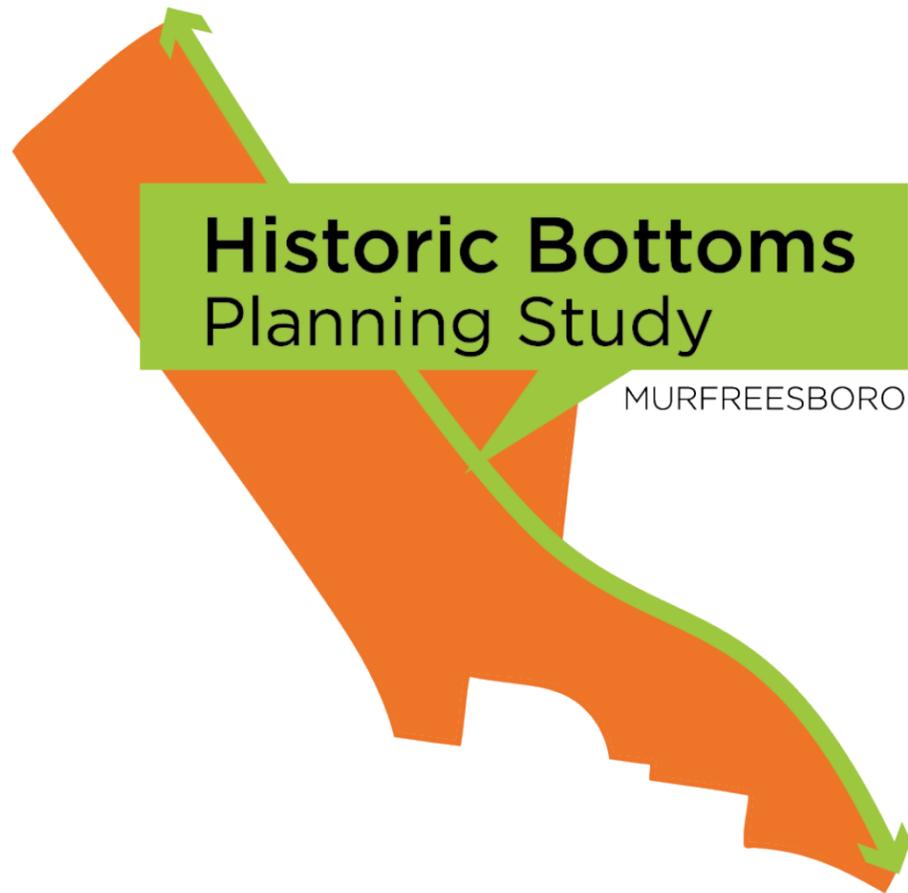
Ragan-Smith was the lead firm to coordinate efforts throughout all phases of the project.

Project Schedule:

January 26, 2016:	Kick-off Meeting
March 8, 2016:	Site reconnaissance & inventory update meeting with City Staff
March 18, 2016:	On site walking tour led by State Historian
April 12, 2016:	Community Stakeholder Interviews <i>(43 Participants Interviewed - Combined with North Highlands Study)</i>
June 6, 2016:	Team meeting with City Staff
July 12, 2016:	Steering Committee #1
August 9, 2016:	Project Visioning Workshop
September 13, 2016:	Steering Committee #2
October 11, 2016:	Steering Committee #3 Public Open House #1 <i>(78 Attendees - 121 comments logged on charts)</i>
October 19, 2016:	Preliminary Planning Commission Review
November 10, 2016:	Steering Committee #4 Public Open House #2 <i>(52 Attendees - 118 comments logged on charts)</i>
December 6, 2016:	Steering Committee #5
December, 2016:	Planning Commission Review
January-Feb. 2017:	Planning Commission & City Council Review

*(*63 comments were logged on Facebook over the length of the project)*

Community input was gathered through multiple sources including stakeholder focus groups, Facebook comments, input boards at community events on the square, email input to City staff, public visioning sessions and open house presentations. From this body of commentary, a list of the most common thoughts and ideas have been summarized below.



Top Issues

from Stakeholder Interviews:

1. Study area to reconnect Downtown
2. Produce multi-modal connectivity throughout the study area and especially along Broad Street and Church Street
3. Recognize homeless presence
4. Focus on community, walkability and historical interpretation
5. Work to reduce crime and the perception of unsafe areas in the study area
6. Provide for more residential options
7. Draw students to stay in town during evenings and weekends
8. Recognize and enhance the history of the study area
9. Look for opportunities to brand this area

Top Big Ideas

from Public Visioning Session & Social Media:

1. Expand Downtown Across Broad Street
2. Pedestrian Crossings on Broad Street / Slow Down Traffic
3. Adjust Existing Road Network
4. Create an Art & Entertainment District
5. Celebrate History & Culture
6. Daylight & Re-introduce Town Creek into Development
7. Greater Mixture of Uses & Increased Density
8. Create a Place of Destination with an Emphasis on Connections to Downtown
9. Collaborate with the City's Task Force Regarding the Homeless in the Area



Throughout the planning study process, community involvement, stakeholder input, and steering committee review were given a high priority. Several workshops and public input meetings were held to discuss the project goals, review design concepts, and to gather public input which proved invaluable in the planning process. Nine Big Ideas emerged during the analysis and strategic development process for the Historic Bottoms Study. During the open house process, public input was gathered regarding the priorities attached to the Big Ideas. The priority summarization outlined in the table below indicates that the idea of expanding the Downtown District is seen as a very high priority. Increasing mobility across Broad Street involving more opportunities for pedestrians, bicycles, and mass transit routes along with strengthening connections to MTSU's campus is also seen as a high priority. Addressing the opportunities and constraints associated with homeless services in this area is also seen as an important issue. All of the Big Ideas received enough prioritization to warrant them as important.

Big Ideas:	1st Priority:	2nd Priority:	3rd Priority:	Total:
Expand Downtown Across Broad Street <i>The Downtown needs to include more area and to include opportunities for more restaurants, retail, and residential. Consider an Art & Entertainment District as part of the Downtown area. Continue to reinforce the Courthouse as the ceremonial, formal civic space in the heart of Downtown.</i>	11	16	1	28 ^{1st}
Pedestrian Crossings on Broad Street / Slow Down Traffic <i>Provide for more pedestrian, bicycle, and mass transit opportunities especially on streets designated as community and commercial connectors. Stronger connections between MTSU campus, the Downtown Area, and stronger pedestrian connections across Broad Street.</i>	8	12	7	27 ^{2nd}
Adjust Existing Road Network <i>Enhance connections at Church & Lytle as gateways to Downtown. Extend Old Salem to create a new intersection between Vine & Church St. Extend a one way approach from St. Rt. 96 to create a direct connection to Main St. and the square. Develop three strong signalized at-grade crossings (Vine, Old Salem, & Church</i>	7	6	8	21
Create an Art & Entertainment District <i>Function to encourage establishments with a cultural entertainment, art, and creative enterprise work space and housing as a focus.</i>	13	7	3	23 ^{4th}
Celebrate History & Culture <i>Celebrate the history of Murfreesboro with monuments, interpretive signage and art in public space. Connection to the rich musical history deserves special attention.</i>	5	3	9	17
Daylight & Re-introduce Town Creek into Development <i>There are numerous benefits of daylighting Town Creek including providing wildlife habitat, flood protection, natural cooling, and an invaluable aesthetic and recreation amenity to the surrounding neighborhood. Economic benefits include increased property values and commercial activity in the area.</i>	13	4	5	22
Greater Mixture of uses & Increased Density <i>Concentrate a greater density and a mixture of commercial / office and residential uses at key development "nodes" in the Historic Bottoms area.</i>	4	0	7	11
Create a Place of Destination with an Emphasis on Connections to Downtown <i>Connect the existing parks, squares, and green space with trails, walkways, and urban greenways. Plan for acquiring and preserving open space in the Historic Bottoms Study Area to balance the anticipated increase in development density of the Downtown Area and improve health and recreational opportunities.</i>	6	4	5	15
Collaborate with the City's Task Force Regarding the Homeless in the Area <i>Coordinate with the evaluation of opportunities and constraints associated with the current services that are provided to the homeless in the Historic Bottoms Study Area.</i>	19	2	3	24 ^{3rd}



NW Broad St & Old Salem Rd Intersection



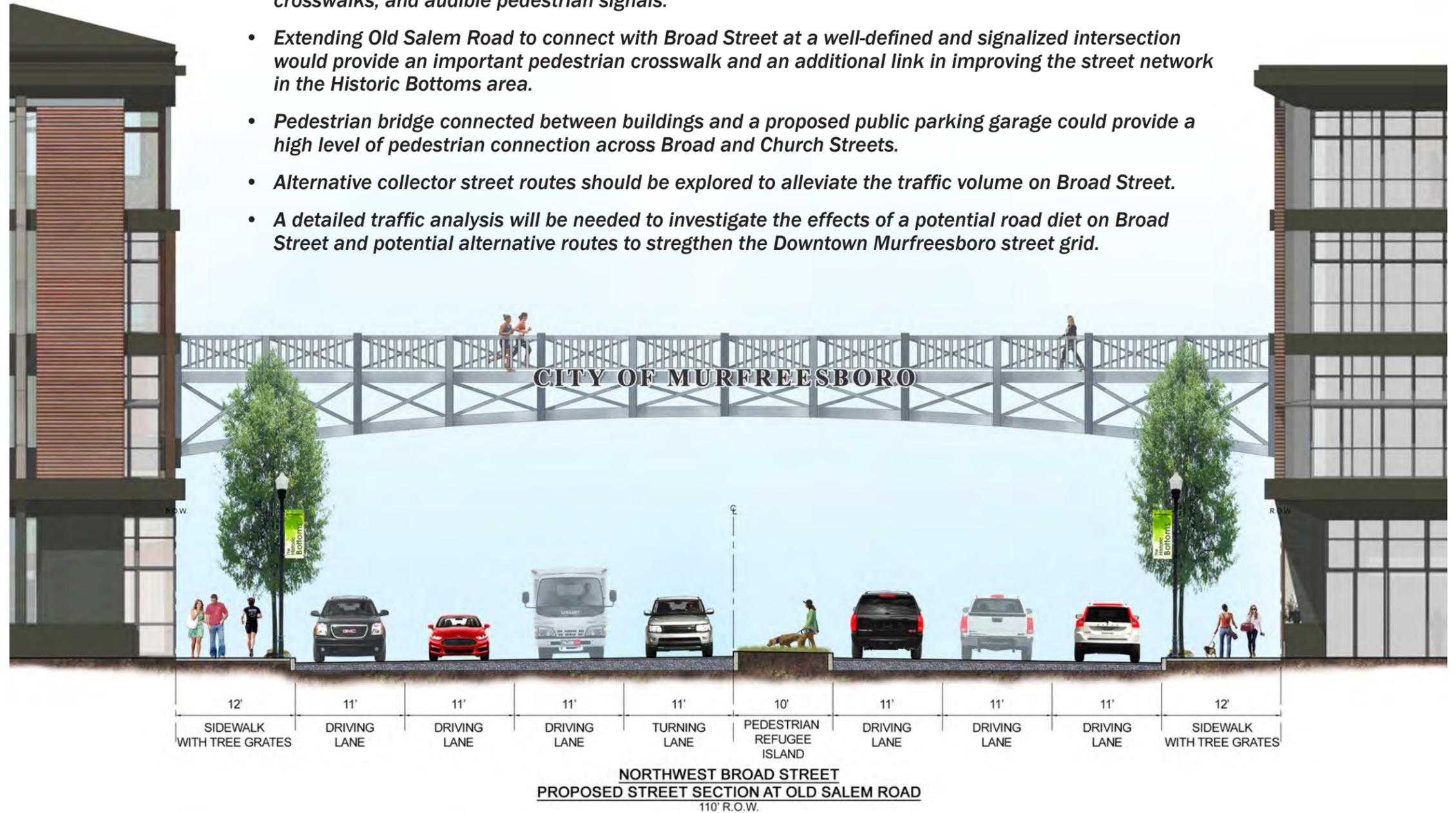
NW Broad St & W Main St Intersection

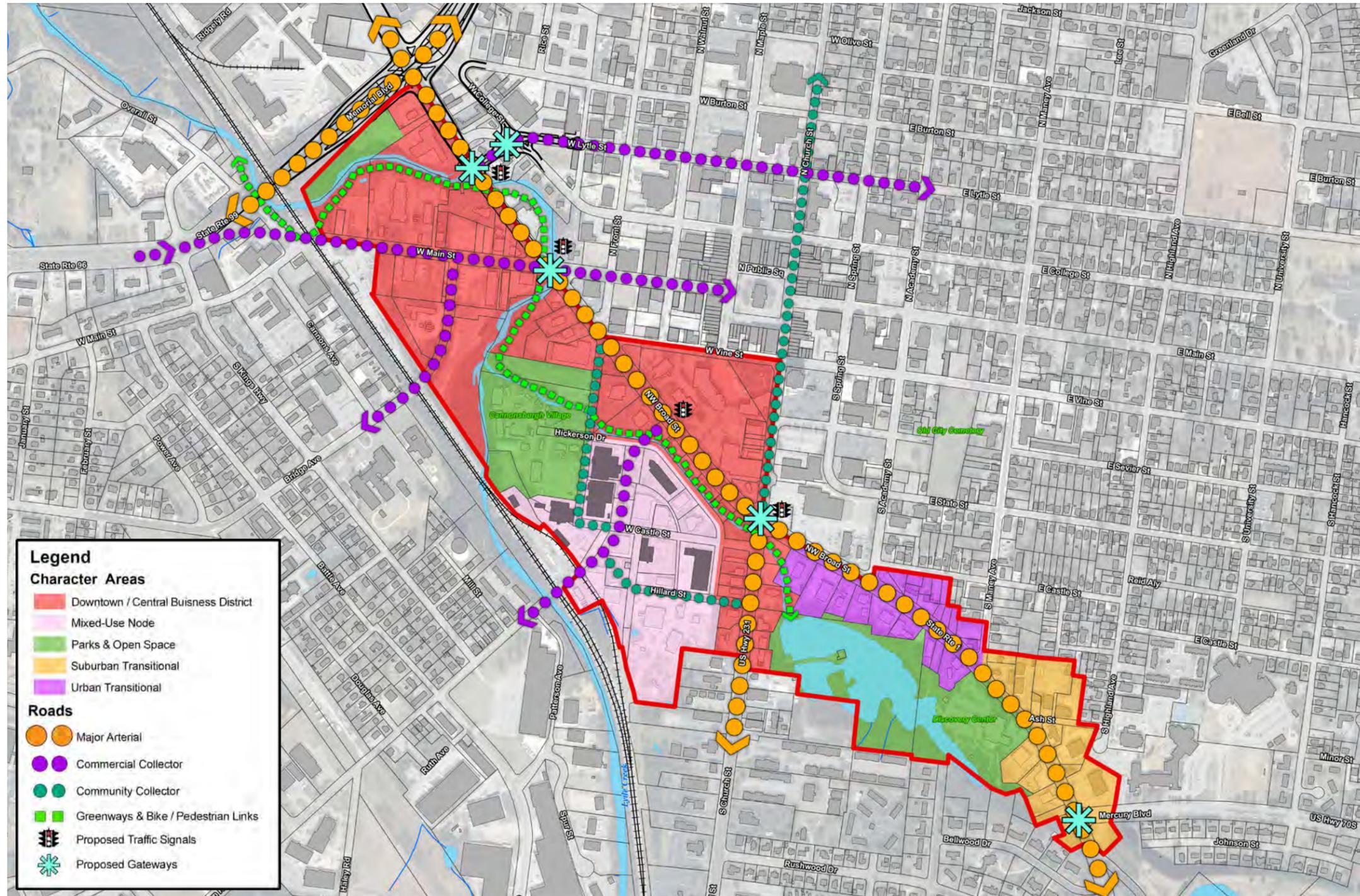


NW Broad St & S Church St Intersection

Proposed Transportation Network:

- Pedestrian crossings on Broad Street will be very important. Clearly defined walk systems are needed at signalized intersections, along with safe haven islands, well designed curb ramps, clearly marked crosswalks, and audible pedestrian signals.
- Extending Old Salem Road to connect with Broad Street at a well-defined and signalized intersection would provide an important pedestrian crosswalk and an additional link in improving the street network in the Historic Bottoms area.
- Pedestrian bridge connected between buildings and a proposed public parking garage could provide a high level of pedestrian connection across Broad and Church Streets.
- Alternative collector street routes should be explored to alleviate the traffic volume on Broad Street.
- A detailed traffic analysis will be needed to investigate the effects of a potential road diet on Broad Street and potential alternative routes to strengthen the Downtown Murfreesboro street grid.





Land Use Designations:

The future land uses were defined by analyzing the existing land use patterns, existing land features, future growth opportunities and the unique qualities of different parts of the study area. These character areas are not proposed zoning changes, but they could be used to shape future zoning policy.

- **Downtown / Central Business District:** Retail sales, services, hotels/motels, residential, office, recreational services and restaurants that are predominantly privately owned and operated for profit.
- **Mixed-Use Node**
Opportunities exist to create mixed-use nodes of dense developments at key intersections. These areas are ideal for blending a mixture of residential, commercial, & office space together in multi-level buildings. This area can also accommodate existing industrial uses.
- **Urban Transitional**
Transition from high density to moderate-high density mixed-use development, or free standing commercial or office buildings. Opportunities also exist for attached or multi-family residential development.
- **Suburban Transitional**
Areas appropriate for a mixture of residential, commercial, and office use, typically at medium densities.

Downtown/Central Business District:

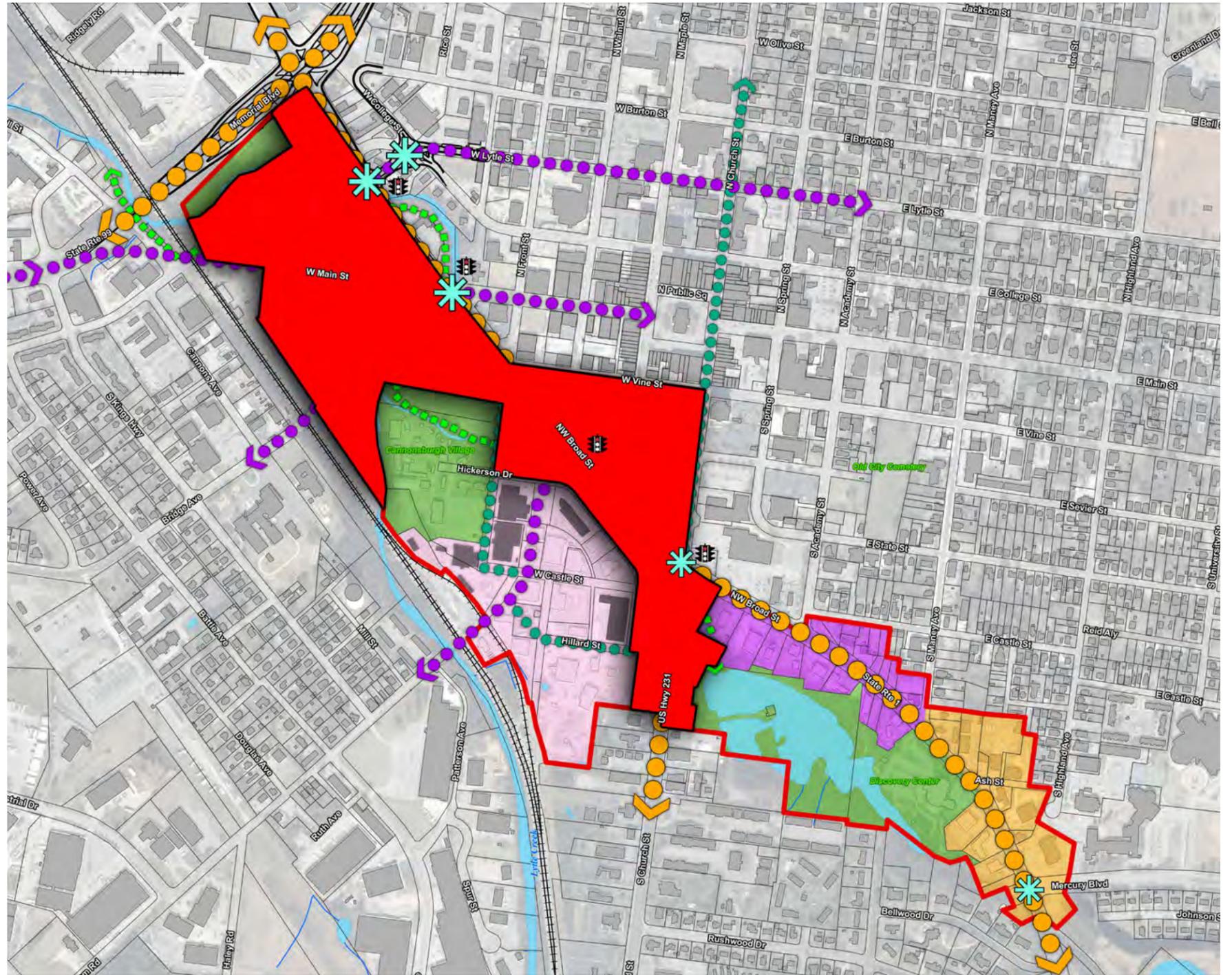
The downtown area in Murfreesboro has its focus on the square and the historic courthouse surrounded by mostly two-story buildings. The area has a historic feeling and a personal scale. However, the size of the existing downtown area is small in scale relative to the population of Murfreesboro. The ground floor use around the square is predominantly office space.

It would be beneficial to expand the area classified as downtown on current zoning maps. This includes expanding the downtown “feeling” to the northwest of the square and across N.W. Broad Street. It would also be good to capture more opportunities for a mixture of retail and restaurant establishments and residential housing opportunities in the expanded downtown area. Capturing residential development is important in providing a spectrum of housing opportunities that respond to the age and economic needs of Murfreesboro residents. Residential development also helps to drive the success of downtown retail and restaurant businesses.

The expanded downtown district needs to become a stronger destination point for visitors and tourists. The district could benefit from a stronger connection to MTSU and should seek to capture the current market demand for urban living and urban amenities.

As highlighted in the Murfreesboro 2035 Comprehensive Plan, growth should “Encourage infill development and redevelopment, which maximizes existing infrastructure, maintains the existing character of neighborhoods, and preserves a compact community form.” The infill and redevelopment opportunities in the expanded downtown district serve to meet this goal.

Specific recommendations that have been discussed for achieving some of the redevelopment goals for the Downtown Central Business District include a possible tax increment financing district, flexibility in code requirements to help reinvestment in older buildings around the square (where possible) and creation of an Art & Entertainment district.





Streetscape:

- Wide Sidewalks (6-12 ft. min.) along public streets
- Street Trees (Appropriate Compact Urban Species)
- Formal On-Street Parking outdoor cafes, plazas, pocket parks, and street amenities encouraged
- Pedestrian scaled street lighting required

Character Setbacks:

- Mixed-use and commercial buildings are placed close to sidewalk
- Residential buildings have shallow setbacks
- Institutional buildings have setbacks appropriate to purpose
- Structured parking placed close to sidewalk with active uses at street level

Use:

- Retail/Restaurant/Entertainment
- Office
- Residential (Multi-family, Single-family Attached)
- Institutional/Civic
- Structured Parking

Building Design:

- Greater emphasis on building design and materials
- Encourage materials consistent with existing downtown character
- Require a high percentage of door and window area on front facades

Landscaping & Screening:

- Allow for greater amount of impervious surface permitted
- Service areas, garage collection and utility boxes and connections provided at the rear of buildings
- Greater emphasis on hardscape details
- Less emphasis on foundation plantings
- Encourage a high level of detail in public spaces (Plazas, Pocket Parks, Streetscapes)

Height:

- 2 Story encouraged
- 4 stories maximum without residential use
- 6 stories maximum with density bonus for including residential

Parking & Access:

- Parking located behind or below buildings
- Access primarily from secondary streets and/or alleys
- Central parking garages utilized



Art & Entertainment District Overview:

The Art & Entertainment District established over the Downtown Square and part of the extended Downtown District would function to encourage establishments with a cultural entertainment, art and creative enterprise work space and housing as a focus. The district can target incentives for art and cultural businesses, entertainment venues, and organizations, such as sales or use tax breaks for art supplies, galleries, and public assembly venues. The Art & Entertainment District would be best associated with mixed-use and moderate to high density space.

Key elements for the district include:

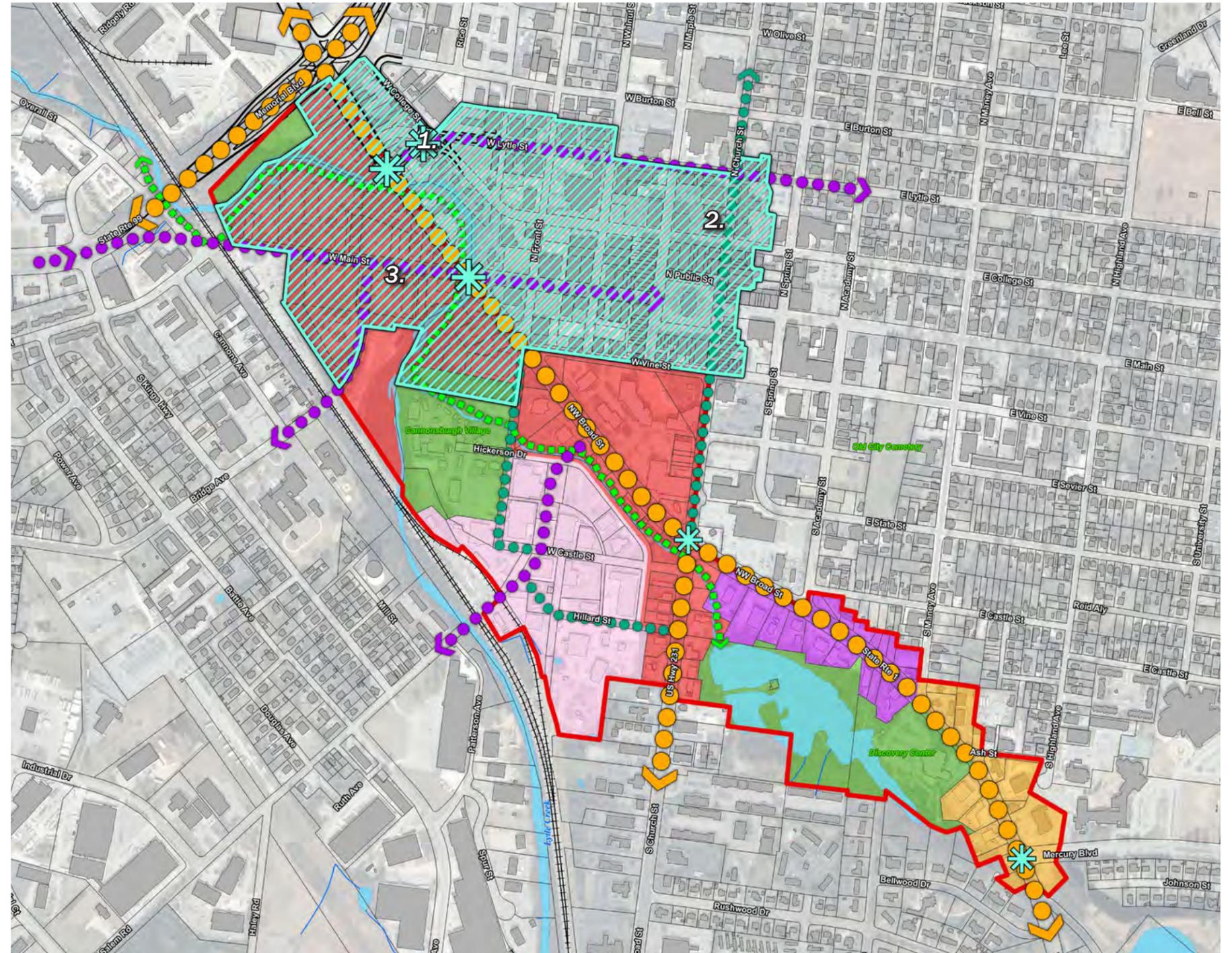
- Walkable area small enough yet sufficient for clustering of entertainment and associated activity.
- Inclusion of existing cultural and/or entertainment anchors and venues.
- Provide developable sites and opportunities for rehabilitation and leveraging of revitalization.
- Use of historic / vintage character existing buildings as venues.
- Provide opportunities for restaurants, bars, and mixed-use in existing buildings or new infill development.
- Clear signage and monuments for wayfinding and market branding opportunities
- Locations for public art display

Potential Elements:

- Restaurants & Drinking establishments
- Food Trucks
- Public Art Displays
- Outdoor Amphitheaters
- Community Events & Art Shows
- Art Galleries
- Outdoor Cafes
- Specialty Retail
- Performing Arts / Theaters
- Cultural Trail

Art & Entertainment Focus Areas:

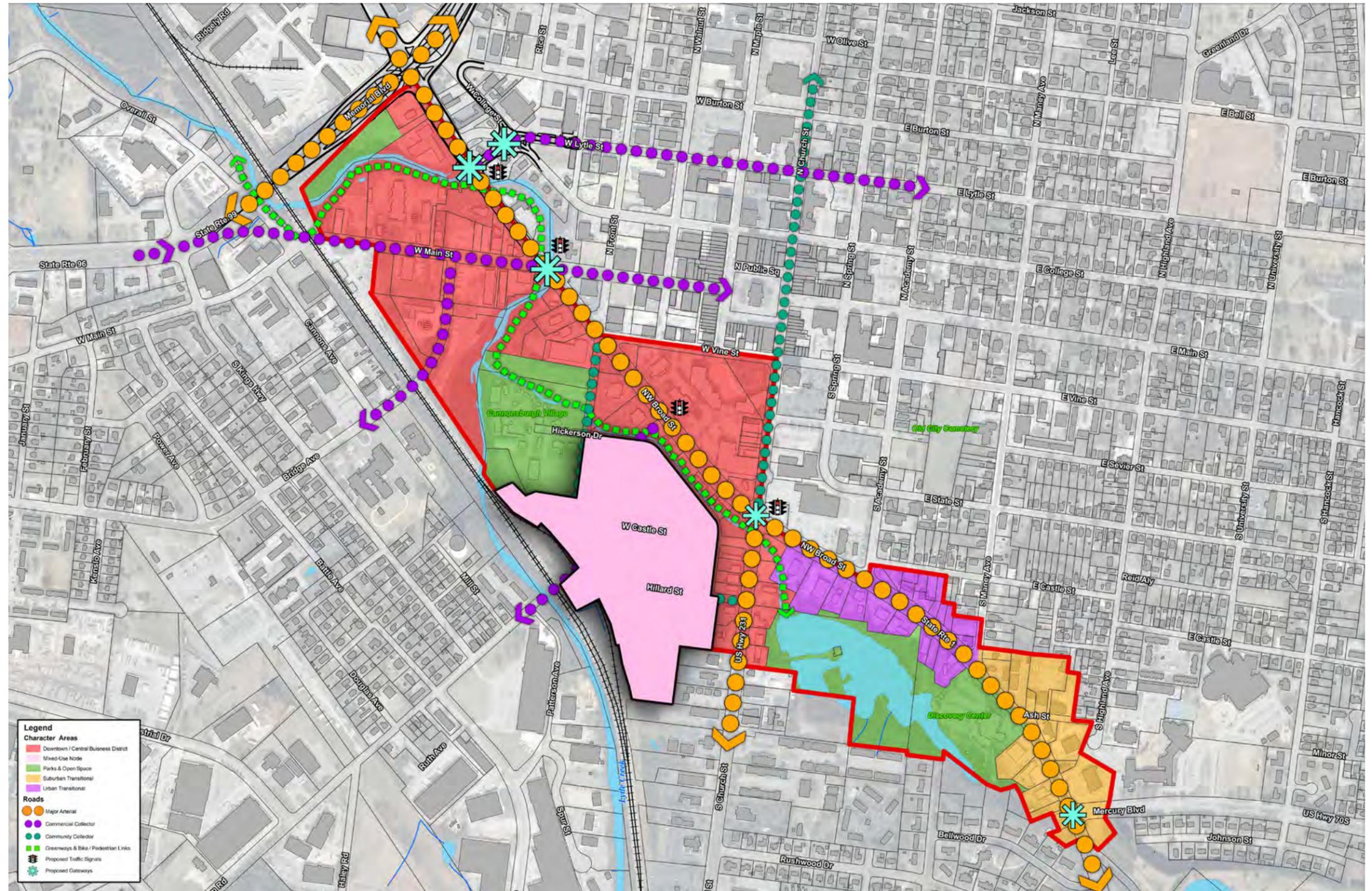
1. Lytle Street improvements serving as gateway
2. Existing Center for the Arts and connection to City Square. Strong historic, but limited opportunity for new development
3. Main Street Corridor prominent relationship to City Square. Existing Buildings have strong character connection to adjoining Cannonsburgh





Mixed-Use Node:

The Mixed-Use Node District in the Historic Bottoms study area would promote the opportunity for development of a higher density in nature. This area will also fit well with the idea of blending a mixture of residential, commercial and office space together in multi-level buildings. Existing industrial uses could be integrated with new mixed-use development. The form that many mixed-use developments take allows for integrated parking and good pedestrian connections. This node will be a good place to provide medium to high density residential units that help meet the need for work force housing units. Mixed-use development zones provide flexibility in space and response to market conditions. Mixed-use sites typically have opportunities for a strong sense of place with common open space and plaza areas.





Streetscape:

- Wide Sidewalks (6-12 ft. min.) along public streets
- Street Trees (Appropriate Compact Urban Species)
- Formal On-Street Parking
- Outdoor cafes, plazas, pocket parks, and street amenities encouraged
- Pedestrian scaled street lighting required

Character Setbacks:

- Mixed-use & commercial buildings are placed close to sidewalk
- Residential buildings have shallow setbacks
- Institutional buildings have setbacks appropriate to purpose
- Structured parking placed close to sidewalk with active uses at street level

Use:

- Retail / Restaurant
- Office
- Residential (multi-family, Single-family Attached)
- Institutional
- Structured Parking

Building Design:

- Greater emphasis on building design & materials
- Street level & front facades maintain a high percentage of door and window space
- Flexibility in architectural style

Landscaping & Screening:

- Allow for greater amount of impervious surfaces
- Service areas, trash collection, utility boxes & connections provided at the rear of buildings
- Greater emphasis on hardscape details
- Less emphasis on foundation plantings
- Encourage a high level of detail in public spaces (Plaza's, Pocket Parks, Streetscapes)

Height:

- 3 story maximum
- 4 story maximum (bonus with residential use)

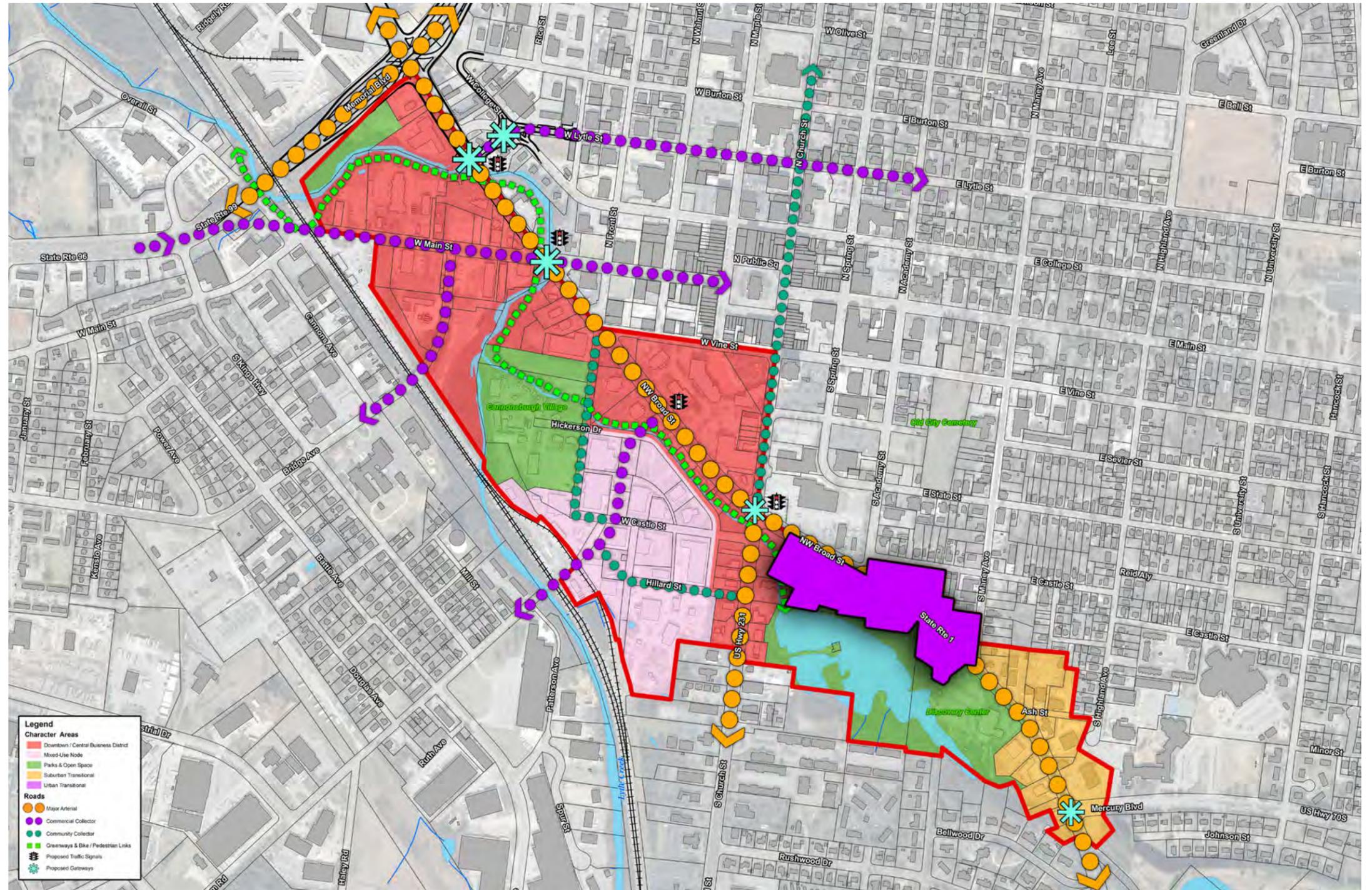
Parking & Access:

- Parking located behind or below buildings, or in combined lots
- Access from secondary streets and/or alleys
- Combined parking lots & garages

Urban Transitional:

The Urban Transitional area relates to the Downtown - Central Business District but acts as a transition to areas with less density. This development area has potential for a moderate to high density residential development with a mix of ground floor commercial retail and/or office. New development should have buildings close to the street with parking at the side and the rear of lots. Lots are of moderate size with limited depth and access to Broad Street. Many of these lots would be good acquisitions for the Discovery Center and Murfree Spring Park if they were to become available.

- This portion of Broad Street still relates to the Downtown District but acts as a transition to areas with less density.
- Land use includes commercial, office, and residential.
- 2 story buildings with an allowance for 3 story if residential is included.
- Lots are of moderate size with limited depth and access of Broad.
- Encourage new development to have buildings close to the street with parking at the side and rear of lots.
- Some of these lots would be good acquisition to the Discovery Center and Murfree Spring Park if they became available.





Streetscape:

- 6' wide sidewalks & 6' min. planting strip between sidewalk and street
- Street trees
- Formal on-street parking
- Dedicated bike lanes

Character Setbacks:

- Residential buildings have shallow setbacks
- Commercial or Office related to street with shallow setbacks

Use:

- Residential (multi-family, Single-family Attached)
- Ground Floor Office
- Ground Floor Retail Commercial, i.e. Coffee Shop, Home Furnishings
- Free Standing Commercial or Office Buildings

Building Design:

- Greater emphasis on building design, materials, & quality.
- Flexibility in architectural style

Landscaping & Screening:

- Foundation plantings encouraged
- Parking, loading, and service areas to be screened with landscape

Height:

- 2 story maximum, with allowance for 3 stories if residential is included.

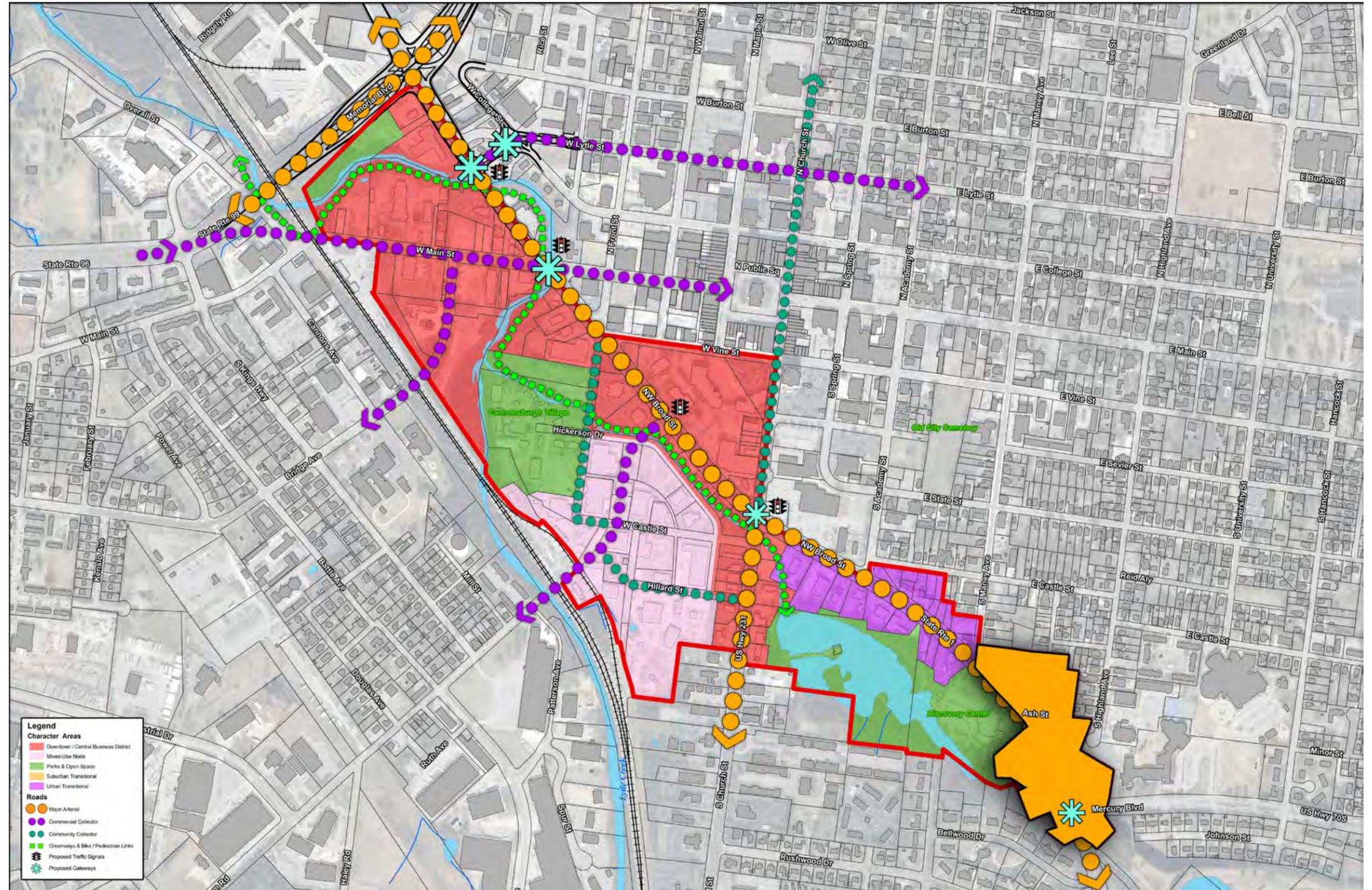
Parking & Access:

- Parking located behind or below buildings, or in combined lots
- Access primarily from secondary streets and/or alleys.

Suburban Transitional:

The Suburban Transitional area is placed on the southeast side of the Historic Bottoms where Broad Street narrows. This development area has potential for a moderate density residential development with a mix of commercial retail. It continues in the context of Downtown / Central Business District and the Urban Transitional areas along Broad Street. This area continues to act as a transition to the Downtown area.

- Broad Street narrows in this area
- Maximum building height is 2 stories
- Proposed uses include commercial and residential





Streetscape:

- 6' wide sidewalks & 6' min. planting strip between sidewalk and street
- Street trees
- Formal on-street parking
- Dedicated bike lanes

Character Setbacks:

- Residential buildings have shallow setbacks
- Commercial or Office related to street with shallow setbacks

Use:

- Residential (Single-family, Single-family Attached)
- Ground Floor Retail Commercial, i.e. Household Supply, Gym
- Free Standing Commercial or Office Buildings

Building Design:

- Greater emphasis on building design, materials, & quality.
- Flexibility in architectural style

Landscaping & Screening:

- Foundation plantings encouraged
- Parking, loading, and service areas to be screened with landscape

Height:

- 2 story maximum

Parking & Access:

- Parking located behind or below buildings, or in combined lots
- Access primarily from secondary streets and/or alleys.

Parks & Open Space Overview:

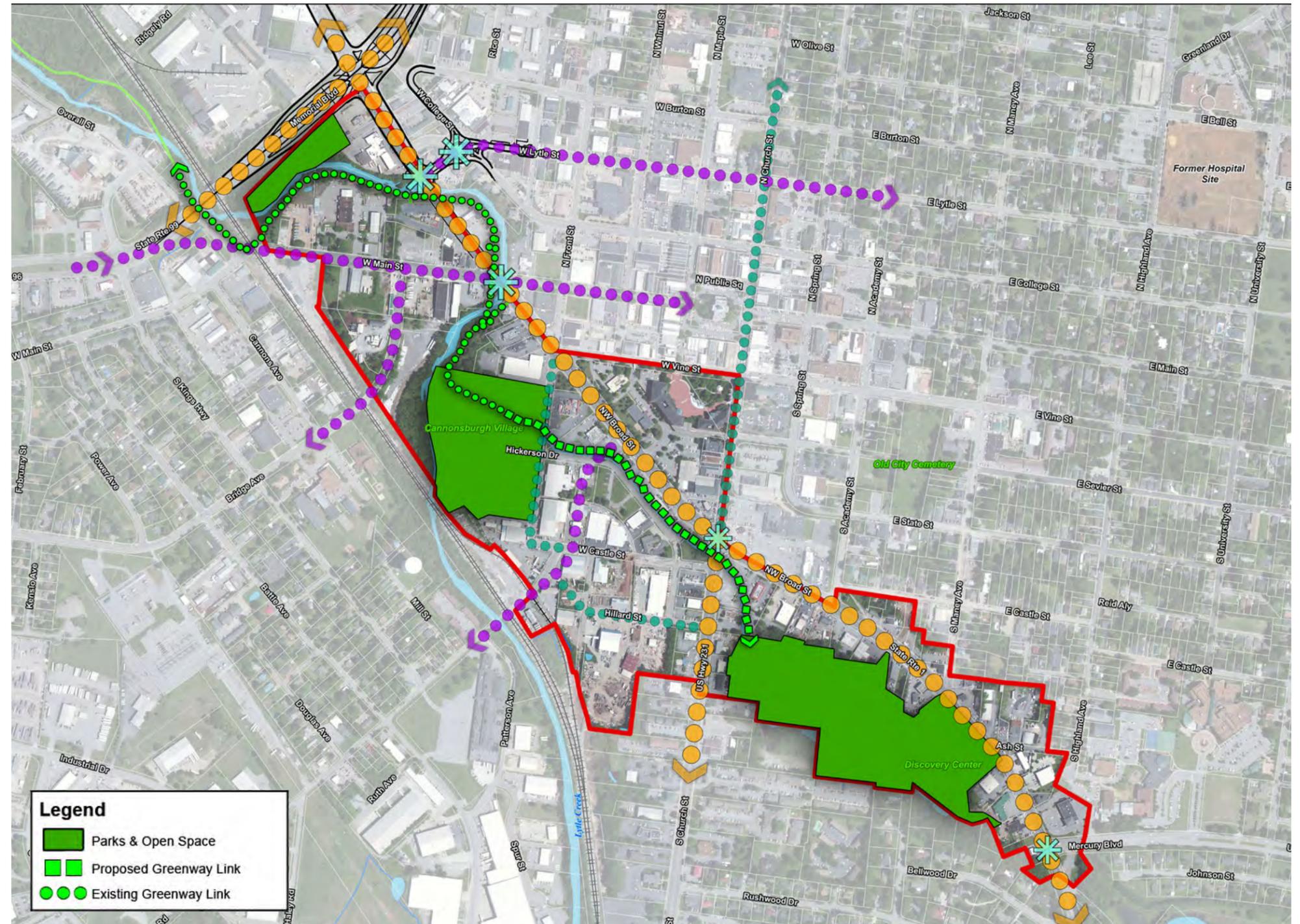
The Historic Bottoms is home to two community treasures in Cannonsburgh Village and the Discovery Center. These parks provide unique hands-on opportunities for education in history and nature. However, it is important for a community to have a mixture of parks that balance passive and active recreational needs for its residents and its visitors. It is also important for these park systems to be linked together with trails, pedestrian walkways, multi-use greenways and multi modal streets (streets designed for people, bikes, cars and mass transit). The benefits of each park and open space facility are greatly enhanced by connecting them.

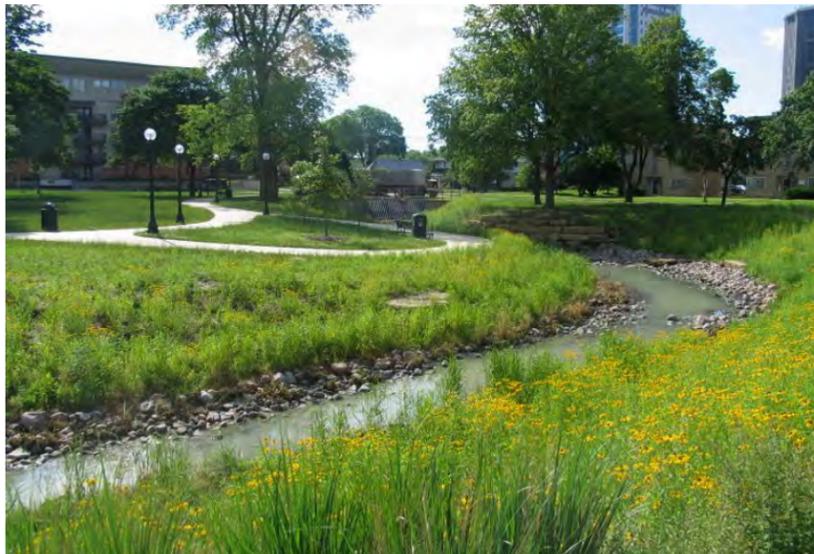
As the development density of the Historic Bottoms Area increases it will be important to balance commercial and residential growth with the parks and open space needs of the community. As highlighted in the Murfreesboro 2035 Comprehensive Plan; "As cities across the country find that populations are being attracted back into more urbanized areas, revitalized park systems and recreation facilities are becoming central themes of this urban renaissance. The role of parks in cities and urban metropolitan areas has become much greater as the scope and impact of parks increasingly influences quality of life, economic development, health, and many other aspects of urban life."

The Historic Bottoms area and Downtown Murfreesboro are currently within the service area of some excellent special use and community parks however there is some significant challenge in connecting to these parks. Broad Street serves as a barrier to pedestrian and bicycle connections to the Downtown Square and the Oaklands Mansion. Its suburban commercial feeling and relative high speed travel discourages access and recognition of these valuable community assets.

A strong connection from the existing Lytle Creek Greenway to the Discovery Center is needed. There is an existing opportunity for this connection by "day-lighting" Town Creek. In addition to existing park and open space facilities, there is a need for small pocket parks, public open space amenities and urban plazas to be incorporated into future mixed-use development areas and the expanded Downtown District. These are especially important assets for establishing the Downtown District of Murfreesboro as a stronger destination place for visitors and potential tourists.

Cannonsburgh Village has the potential to serve as a stronger community space with continual seasonal events to draw tourism and local programs, such as outdoor theater space and community garden space.





Existing Park Summary:

Special Use / Regional Parks:

- Stones River National Battlefield & Fortress Rosecrans
- Oaklands Mansion
- Cannonsburgh Village
- Murfree Spring & Wetlands
- Bradley Academy Museum & Cultural Center
- Murfreesboro Square & Historic County Courthouse
- City Hall Plaza

Community Parks

(1-2 mile service area):

- Oaklands Park
- Patterson Community Center Park
- Old Fort Park

Neighborhood Park & Schools

(½ mile service area):

- Murfreesboro Little Theater & Park
- Central Magnet School
- Homer Pittard Campus School

Linear Park & Greenway:

- Lytle Creek Greenway

Future Proposed Park Acquisitions:

- Pocket Parks
- Urban Plaza Space
- Public Art Displays

Development Scenario Overview:

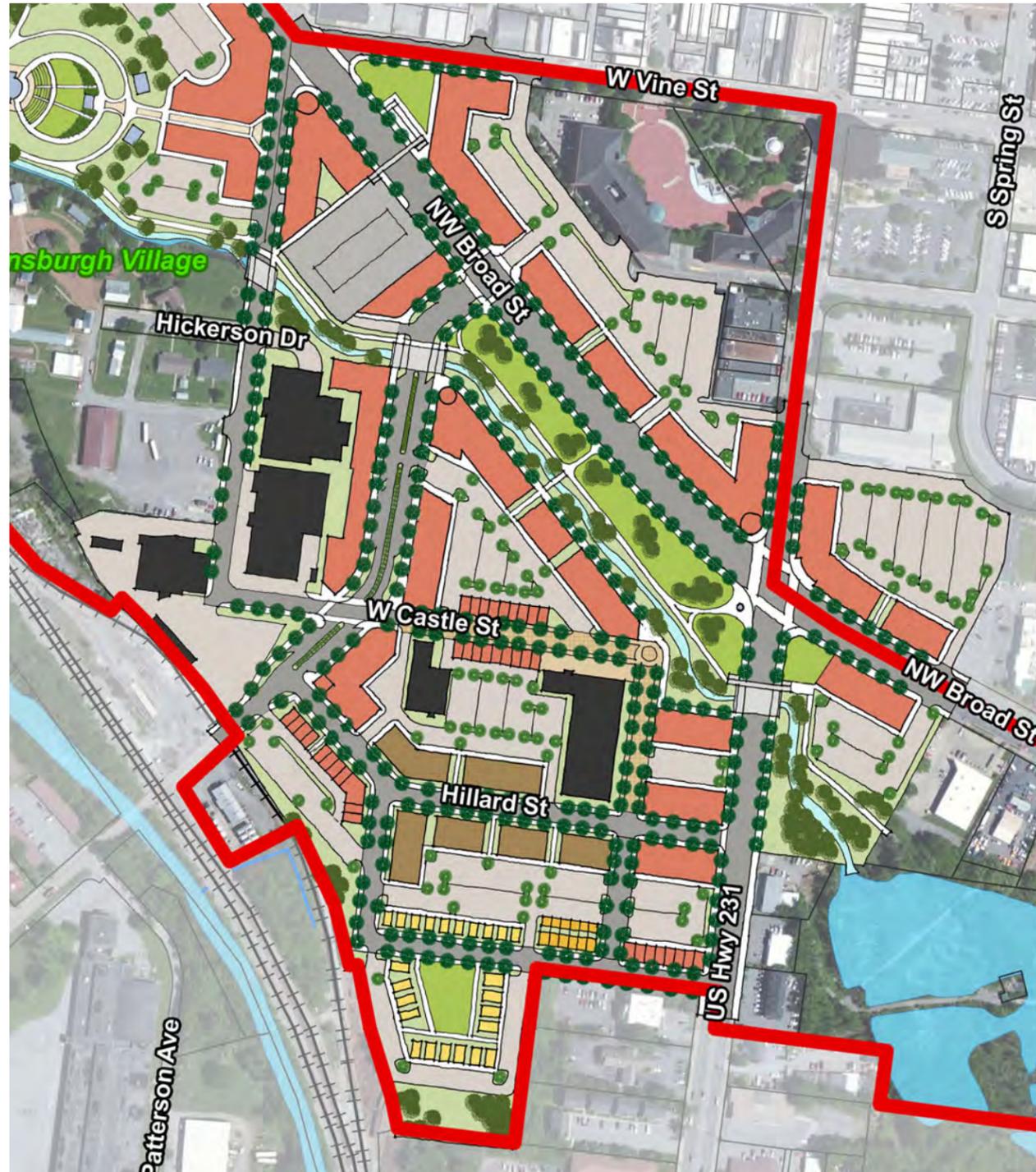
Specific areas of the Historic Bottoms Study Area were examined to explore how development patterns might look as growth occurs in the Downtown Murfreesboro area. The development areas start with the established street network as a framework. In some cases new street networks are created and lots are consolidated to provide better geometry for typical building patterns. Existing buildings that contribute to the desired future character are left in tact (black buildings in the scenario). Potential new infill buildings that fit the desired future character of the area are also illustrated (colors correspond to building type and use). The pattern depicted is only one of many possible alternatives.

Based on the market analysis for this study area, square footages for additional office, residential and retail spaces are calculated to fit into the new development footprint. This provides a sketch for how an area might shape out in the future based on the potential demands for a ten year market window.

Parking requirements are roughly calculated and open space opportunities are also evaluated to determine how much building footprint can be accommodated in an area. In this study potential commercial and retail buildings are generally depicted in red, multi-family apartments, condominiums or mixed-use residential buildings are shown in brown, attached single family or townhome units are shown in orange and single family detached homes are shown in yellow. Potential office or institutional buildings are depicted as blue and potential hotel space is depicted as purple.

Precedent imagery for some of the building and site characteristics are shown on enlargement graphics for each scenario.





The Bottoms Core Development Scenario 1 highlights the daylighting of Town Creek along Broad Street to create a linear park and a greenway connection between Cannonsburgh and the Discovery Center. The existing street network was used as the original frame work for the scenario, then was reworked to be more functional and efficient. Old Salem Road is shown extending to Broad Street with the addition of diagonal on-street parking, landscaped medians, and mixed-use development occurring on both sides. Portions of Castle Street and Hickerson Drive are shown as a “shared street” with live/work units and existing buildings to frame the new shared boulevard giving it a more pedestrian scale. Additionally, this scenario shows the potential for a municipal parking structure including a pedestrian bridge that would connect over Broad Street into the North Highland Study Area.

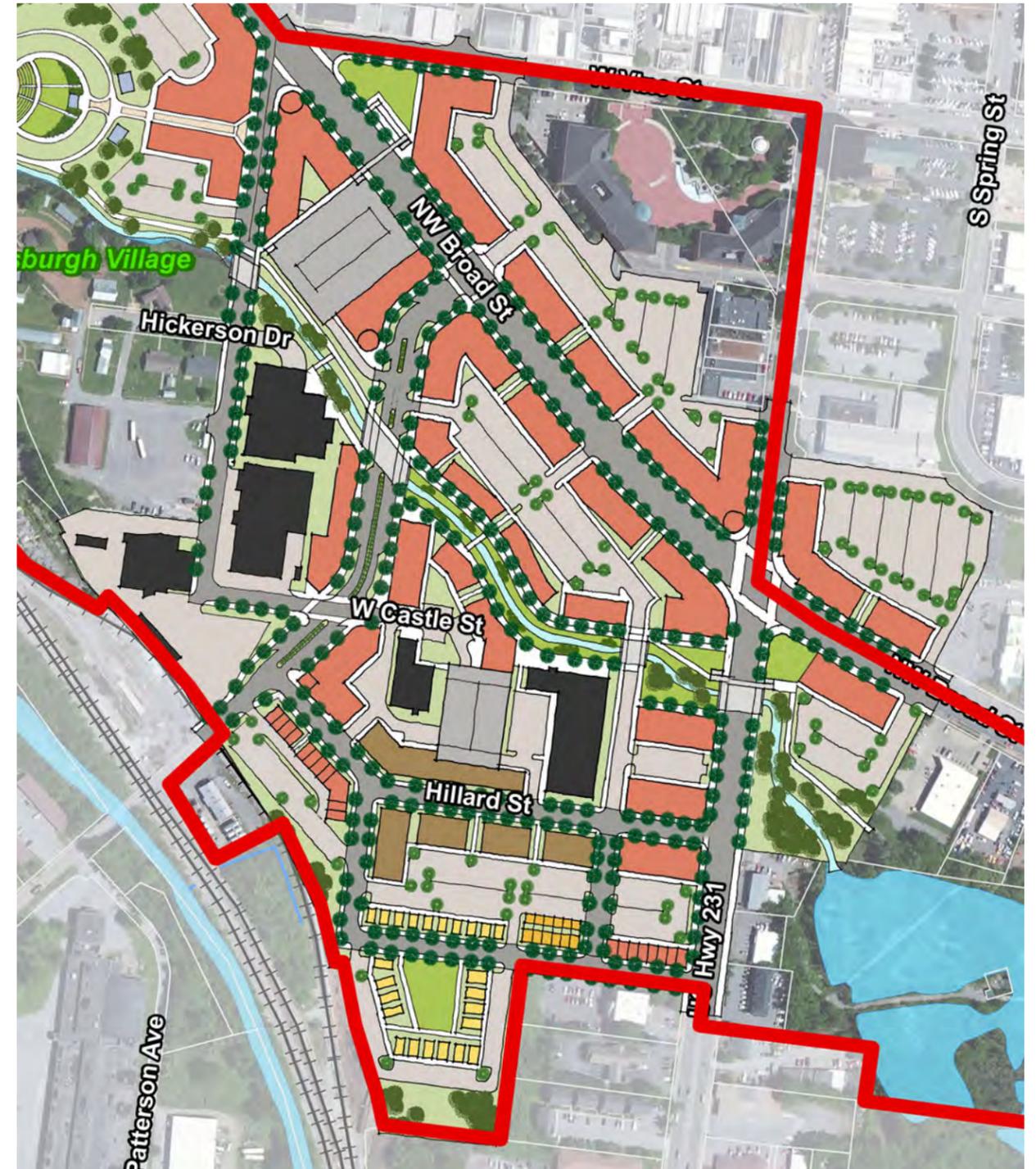
Legend

- Mixed-Use
- Multi-Family
- Townhouses
- Cottages
- Civic
- Existing Buildings

Similar to the Bottoms Core Development Scenario 1, the Bottoms Core Development Scenario 2 highlights the daylighting of Town Creek. However, this scenario shows Town Creek taking an interior route creating a linear park and greenway connection between Cannonsburgh and the Discovery Center along Hickerson Drive. This route would allow for mixed-use development to take place along Broad Street and along both sides of Town Creek that was not possible in the previous scenario. Much like the previous scenario, the existing street network was used as the original frame work for development, then was reworked to be more functional and efficient. Old Salem Road is again shown extending to Broad Street with the addition of diagonal on-street parking, landscaped medians, and mixed-use development occurring on both sides. Additionally, this scenario also shows the potential for a municipal parking structure including a pedestrian bridge that would connect over Broad Street into the North Highland Study Area. Structured parking and surface parking will be confined to the interior of blocks to create a more urban feel with buildings set to the street.

Legend

-  Mixed-Use
-  Multi-Family
-  Townhouses
-  Cottages
-  Civic
-  Existing Buildings





In the Bottoms Core Development Scenario 3, an effort to preserve the existing street network and buildings was taken. Industrial uses can continue to work with the mixed-use development approach for all three Bottoms Core Scenarios. The timing and pattern of property acquisition and consolidation will shape which buildings remain and where new buildings are developed. The exact location of a redesigned street network and the path of daylighting Town Creek has flexibility. The key objective is to provide a new future signalized intersection with Broad Street that will make this area more accessible.

Legend

- Mixed-Use
- Multi-Family
- Townhouses
- Cottages
- Civic
- Existing Buildings

In the Main Street Development Scenario, preserving existing buildings that contribute to the “downtown” vision for the area was a main goal. It was also important to show the opportunity for vertical mixed-use developments that are consistent with the Central Business District along West Main Street, Broad Street, and at the Bridge Avenue / West Main Street intersection. Additionally, this scenario shows the transition of uses from mixed-use developments along major streets to the surrounding neighborhoods with multi-family residential. Furthermore, this scenario shows the opportunity for an enhanced transit center and an outdoor amphitheater at Cannonsburgh.



- Legend**
- Mixed-Use
 - Multi-Family
 - Townhouses
 - Cottages
 - Civic
 - Existing Buildings



Downtown Marketing and Development Concepts

Murfreesboro is now the fifth largest city in Tennessee, with a population of 150,000 plus a large university student enrollment, within a fast-growing county of 300,000. Murfreesboro deserves a downtown that reflects the growth of its population and economic base, as well as its stature as a major city and home to one of the state's largest universities. Ultimately, downtown Murfreesboro can extend beyond the Square and offer significant opportunities for shopping and entertainment, cultural venues, diverse housing stock, entrepreneurship and business development, civic space, historical context and tourism, all within a walk-able mixed-use urban environment. Downtown Murfreesboro can offer a "college town" feel but can also be much more than a college town. Key components of this concept are summarized below:

Arts & Entertainment District Development Scenario

The market analysis identified significant potential for more commercial entertainment, eating & drinking and other uses that can activate downtown Murfreesboro and create a destination for residents and visitors alike. An arts and entertainment district could be developed that builds on downtown's inherent strengths, its existing base of arts and cultural organizations and venues, and its market potentials. This district would be anchored by 180,000 to 200,000 square feet of performing arts, cultural, and entertainment venues, as well as restaurants, clubs, drinking establishments, and specialty retailers serving a young and diverse clientele. There would also be 10,000 to 30,000 square feet of office space, 50 to 80 residential units, and a hotel integrated into this mix.

Redevelopment & Vision for the Broad Street Corridor

Broad Street is Murfreesboro's "main street," and offers significant opportunities for redevelopment as a more urban and pedestrian-friendly boulevard through downtown. Broad Street can also be positioned as the "zipper" or link between downtown and the Historic Bottoms area, providing exposure and access to and between them. Broad Street is a prime location for hotels and mixed-use development. While the market potential for hotel development was not tested as part of this planning effort, hotels were identified as a market opportunity to fill a gap within the downtown area.

Rethinking Institutional Role in Downtown

There are opportunities for MTSU to extend more of its academic and institutional functions off campus to downtown Murfreesboro. Many other universities have developed strong linkages with the downtown core in their home communities, such as through relocation of programs like culinary arts and entrepreneurship training, retail uses like university bookstores, and public venues like museums and performing arts facilities into downtown areas. The advantages for universities include direct public service training and exposure, enhanced marketing identity (a stronger downtown can help in marketing a university to prospective students and faculty), and revenue growth due to increased participation in institutional programs. Better physical linkages can also be provided between downtown and the campus.

County Government is expanding its presence downtown with new court facilities and offices, providing a strong anchor for downtown. There are additional opportunities to consolidate other government functions away from commercial space in order to free up space for active retail, restaurant, and entertainment functions.

Pro-Active Business Recruitment and Development

A program for business recruitment and development is recommended to strengthen downtown by targeting and attracting new development and businesses to the area. This program is described in more detail in the Appendix Report for this plan.



MARKETING:

- **Marketing Strategies (HB, NH)**
 - **Build amenity value to support housing and tourism development**
 - Mixed-use/Retail Amenities
 - Existing Tourism Assets
 - Existing Music Venues, Events
 - Existing Greenways, Railroad
 - Industrial Character/Assets
 - **Establish Destination Marketing**
 - Arts & Entertainment District (portions of HB and NH)
 - Expand/Strengthen Tourism Offering: Cannonsburgh, music venues, industrial, hotel (NH/HB)
 - Entrepreneurial Dev District: incubator, IT, design, artisanal manufacturing



DEVELOPMENT, FINANCING, & MANAGEMENT:

- **Development & Financing Strategies (HB, NH)**
 - **Preserve/Celebrate Historic, Cultural, & Natural Resources**
 - Historic / Industrial Character
 - Preservation Incentives for adaptive use as maker space, residential, etc
 - **Target Business Development**
 - Small Business/Entrepreneur Incentives
 - Infrastructure improvements
 - Broad Street focus for Redevelopment
 - TIF district (HB and NH)
 - Pro-active Business and developer recruitment strategies
 - **Encourage Affordable Workforce Housing**
 - TIF district & inclusionary bonuses
 - Site assembly, parking / infrastructure
- **Management Strategies (HB, NH)**
 - **Create City Development Agency or Division**
 - Authority to manage TIF district
 - Recruit and negotiate with developers, businesses
 - Manage incentives
 - Work with Community Development on workforce & affordable housing issues
 - **Consider Downtown BID**
 - Self-funding
 - Manage safety, security, parking, cleanliness, etc
 - Work with Main Street on strengthening marketing initiatives
 - Work with City Development on development initiatives, leasing, assembly, preservation, etc

EXISTING CONDITIONS:

Economic Base

Rapid Job Growth but Downtown/HB Not Capturing its "Fair Share"

Office Market Potentials

Downtown-Area Potential for 200,000 square feet

HB: Back Office, Design, Emerging Tech Firms

Residential Market Potentials

Increasing Demand + Limited Supply = Rapidly-Increasing Prices

HB Rental: 144-260 Loft, Apt, Live/work. 100-140 Affordable / Workforce

HB For-Sale: 100-170 For-Sale Lofts, Mixed-Use, Cottages: Workforce

Retail Market Potentials

Downtown-Area Potential for 370,000 sf (90,000sf in entertainment)

HB: 60,000 square feet of Mixed Commercial

RECOMMENDED RETAIL BUSINESS MIX, HISTORIC BOTTOMS AREA	
Existing Assets	
Cannonsburgh Village	
Discovery Center at Murfree Spring	
Bradley Academy Museum/(S Maney Street)	
Uncle Dave Macon Days	
Industrial Heritage/CSX Station/Buildings & Industry	
Main Street Music Venue	
Town Creek, Springs, and Greenways	
Grocery, gym, restaurants, amenities	
New Retail/Commercial Uses	
Distillery/Brewpubs	10,000
Restaurants, Drinking Establishments	15,000
Expanded Main Street Music Venue	5-10,000
Home Furnishings	4,000
Lighting, Other Household Supply	10,000
Antiques "Warehouse"	7,500
Relocated/Expanded Gym	10,000
	56,500

POTENTIALS:

Opportunities Assessment

"Maker" Industrial Spaces

- Artisanal manufacturing, consistent with industrial loft residential, existing industry, & coffee culture in walk-able district
- Incubator Space

Hotel(s)

Arts & Cultural Venue(s)





At the beginning of the planning process for the Historic Bottoms Planning Study, specific goals were established. They can be summarized as: Providing opportunity for economic growth and development, mapping a clear plan to shape land use patterns, establishing a design pattern to preserve and enhance community character, and planning for good transportation, utility and environmental infrastructure. An extensive inventory, analysis and public input process have shaped several “big ideas” that communicate how these goals are translated into a real plan for the study area. These ideas are the important keys to create momentum for the plan to move forward and impact real and positive change for those who live, work, play and visit the Historic Bottoms Study Area. An executive summary of implementation steps for these big ideas is as follows:

Economic Growth and Development:

• Expand Downtown:

The Downtown needs to expand beyond the immediate square and include areas on the southwest side of Broad Street. The downtown area for Murfreesboro should be perceived to include all of west main street and part of the Historic Bottoms district. Driving through Murfreesboro on Broad Street should feel like driving through a part of downtown. Development patterns should promote more opportunities for restaurants, retail, and residential and community events in the heart of the city. The Courthouse and square need to continue to function as ceremonial and formal civic spaces at the center of town. The proposed expanded Downtown Area (central business district) has been mapped on the Future Land Use Map and defined with some precedent imagery and conceptual design guidelines. The recommendation to implement this idea involves three plans of action. The first is to adopt this planning study as a guiding policy document to shape future growth and development in the Downtown Area. This would help in the review and approval process for any proposed rezoning or development that is proposed within the Downtown Area. The second is to expand the existing CBD zoning to match all or a portion of the character area mapped as Downtown / Central Business District as shown on page eighteen. This would establish a larger footprint for the CBD zoning district. The third step would be to review the CBD guidelines and standards for possible revisions to match the proposed future land use objectives. Every step outlined in this plan of action could be done independently with or without the other steps if desired.

• Promote the Historic Bottoms area as a Destination point for tourism:

Events like Uncle David Macon Days should be replicated in the Historic Bottoms area. Cannonsburgh Village is a facility that holds high potential for hosting regional events that establish “destination marketing” opportunities. Recommendations to expand tourism in the Historic Bottoms area include physical, planning and management facets. Improving the physical infrastructure to address increased parking and better access to the area is one key. This is further discussed under the Transportation Infrastructure recommendations. A second key is providing zoning that allows for a mixture of commercial, office and residential uses in addition to the existing industrial uses that occur in the Historic Bottoms area. A third key is establishing strong collaboration between a potential art and entertainment district, the city parks and recreation department (and other city departments), Middle Tennessee State University, and the local chamber of commerce. This collaboration would help facilitate a high level of programing and marketing to draw visitors at both the local and regional level. It would also help to cross pollinate good strategies for attracting visitors to Murfreesboro and connecting them to attractions and establishments that would extend their visit in the Historic Bottoms and downtown area.

• Master Plan Proposal

The City of Murfreesboro may wish to establish the opportunity to drive a collaborative master plan process for the Historic Bottoms area. This could target the Mixed Use Node currently shown on the Future Land Use Map. Such a process would invite existing property and business owners to collaborate to form a potential development plan that would collectively benefit their interests through parcel consolidation and the creation of an improved road network and development “blocks”. This plan could also be connected to interested development investors through a formal or informal RFD (Request For Development) solicitation.

A Clear Pattern to Establish Land Use:

• Increase High Density Residential Opportunities:

Provide more residential options in specific parts of the Historic Bottoms Study Area, including high density residential housing. Residential options are important providing living space in the Downtown Area. When people live in a place they tend place a high value on it. Residents downtown encourage amenities that help establish a marketable destination place. This in turn helps generate economic return for the commercial establishments in the area. Recommendations to implement this idea include zoning that promotes housing density in the mixed-use node and central business district area. Another tool to encourage more residential in the mixed-use and central business districts is the provision of bonus densities and / or additional building height for buildings that include a mixture of residential in addition to office and / or commercial uses. Residential density at the right locations with the right design parameters helps provide for the needs of work force and young urban professional housing demands.

• Greater Mixture of Uses & Increased Density:

A greater concentration of density and a larger mixture of uses that include commercial, office and residential should be promoted within the Historic Bottoms area. The especially holds true for the Central Business and Mixed Use Node land use areas established on the Future Land Use Map. Mixed-use Nodes District has been mapped on the Future Land Use Map and defined with some precedent imagery and conceptual design guidelines. The recommendation to implement this idea involves the same plan as expanding the Downtown Area. The first step is to adopt this planning study as a guiding policy document for these areas. The second is to create a distinct zoning district that would be approved for the Historic Bottoms Mixed Use Node. This would likely require the creation of a new zoning or overlay district with new standards to meet specific objectives and achieve a high quality of development. An alternative interim approach to develop this area would be to promote the use of an existing planned development district for this node. This would require a site specific plan to allow flexibility, create efficiency and insure a high quality of development that fits in the context of its surroundings. These steps could be taken independently with or without the other steps if desired.

• Collaborate with the City’s Task Force Regarding the Homeless

There are currently existing facilities in the Historic Bottoms area that serve the needs of the homeless. These facilities have met an important need. The redevelopment of this area has raised concerns on two fronts. One concern is properly anticipating a different location for these services should they chose to relocate. The proposed mixture of uses associated with the Future Land Use Map for the Historic Bottoms does not prohibit these facilities from remaining, but the anticipated infrastructure improvements and increased land values may make it impractical, and it has been recognized by some of the organizations providing services that this may not be the best long term location for their facilities. The second concern that has been voiced during public input is the concern for creating a safe environment for those who use the greenway and public park spaces in the Historic Bottoms area. A task force has been created by the City of Murfreesboro to examine these issues from a citywide perspective to look for solutions that benefit the entire community.



At the beginning of the planning process for the Historic Bottoms Planning Study, specific goals were established. They can be summarized as: Providing opportunity for economic growth and development, mapping a clear plan to shape land use patterns, establishing a design pattern to preserve and enhance community character, and planning for good transportation, utility and environmental infrastructure. An extensive inventory, analysis and public input process have shaped several “big ideas” that communicate how these goals are translated into a real plan for the study area. These ideas are the important keys to create momentum for the plan to move forward and impact real and positive change for those who live, work, play and visit the Historic Bottoms Study Area. An executive summary of implementation steps for these big ideas is as follows:

A Plan to Preserve Community Character:

• Preservation & Enhancement of :

There is a rich fabric of historical elements and some classic architectural buildings within the Historic Bottoms Study Area. The Bradley Academy Museum and Cultural Center, The Discovery Center at Murfree Spring and Cannonsburgh Village are all connected to the Historic Bottoms area and are all within a walkable distance from each other. One of the big ideas to emerge from the study is to establish an Art & Entertainment District in the Downtown Area. Specific feedback was evaluated during the planning study process from stakeholders, steering committee members and the general public regarding the value and location of a proposed district. A proposed district boundary has been mapped with the Art & Entertainment District Map on page 21. The district is anchored on one end by the square and existing Center for the Arts and anchored on the other end with the edge of Cannonsburgh Village and the historic buildings and promenade to the courthouse created along West Main Street. Implementation of this idea would include creating an official overlay district and an Art & Entertainment task force and committee to govern its administration and marketing efforts. Zoning flexibility and incentives could be offered to developments that provide live-work studio units for artisans interested in establishing themselves in the Downtown Area. The establishment of an Art & Entertainment “cultural trail” with clear and creative signs, trail markings and public art displays would link together existing and future places of interest within the Downtown Area.

• Preserve & Connect Parks & Open Space:

Connecting existing parks, squares and green space greatly increases their use and value. Connecting Downtown to the existing Lytle Creek Greenway is a very important plan of action for the Historic Bottoms area. Strong pedestrian linkage across N.W Broad Street at West Main and other intersections is a top priority to create the link between Downtown and the Historic Bottoms area. Additional Greenway should also be explored along Town Creek, if it becomes “daylighted”, because of its valued connection to the Discovery Center and Cannonsburgh Village. Pocket Parks and open space amenities and urban plazas should be planned in any future developments areas in the Downtown District. Coordination with the Parks and Recreation Department and an Art & Entertainment Committee should be integrated into the development process for all downtown and mixed-use development areas with the goal of having a pocket park, plaza or public art display established at no more than two block intervals. These elements do not have to be large or elaborate only creative comfortable places with some type of noteworthy element. Another implementation tool is the option of creating a nominal park and public art development fee in lieu of dedicating pocket park space. Pursuit of a corporate or institutional sponsor for pocket parks, plazas or public art is worth exploring. Institutional sponsor for pocket parks, plazas or public art is worth exploring.

Transportation Infrastructure:

• Increase Mobility:

More provisions are needed for pedestrian, bicycle and mass transit options in the study area. The desire for a more walkable community was expressed as a high priority from those participating in the public input meetings. One of the key steps to implement this goal is to integrate pedestrian walks as a requirement for all street networks and new development in the study area. This is already a provision in the City of Murfreesboro Street Design Specifications. A good general rule of thumb is “sidewalks everywhere for everybody”. Dedicated or shared bike lanes should be considered standard design elements for all collector streets. Expansion of Rover routes and dedicated transit stops should be specifically evaluated in connection with the downtown and campus areas and with potential key tourism sites. This includes provision of a public parking facility on the southwest side of Broad Street to serve the Historic Bottoms area. A parking garage would serve both large community events and local retail and commercial establishments. Improving pedestrian access across Broad Street will be another key infrastructure improvement. This will require better crossings at existing and future intersections. A pedestrian bridge connected to a potential parking garage could also be an important piece of infrastructure.

• Improve Street Network:

The existing street network in the Historic Bottoms has some major limitations. The angled intersections and limited signalization make it extremely difficult to navigate left turn movements both in and out on S. Front and W. Castle Street. A new street network that extends Old Salem Road to Broad Street creating a new intersection could much better serve the properties in the Historic Bottoms area. This intersection would also be a good location for an additional signal and pedestrian crossing on Broad Street when traffic volumes would warrant it. Increased development and pedestrian crossings on Broad Street will create slower traffic patterns along this portion of Hwy 41. This is a positive thing for promoting a stronger connection to surrounding land use and for pedestrian safety. It may also divert more traffic to surrounding streets. It would be appropriate to examine strengthening surrounding collector routes to accommodate the possibility of increased traffic as people may look for alternative routes through Murfreesboro.

• Broad Street as a Zipper:

One of the big ideas related to transportation and land use together is the concept of rebuilding Broad Street to become an urban, pedestrian-friendly street. This concept will help to bring together Downtown and the Historic Bottoms area making it a destination rather than simply a conduit for cars. The redesign of Broad Street will require elements such as wider sidewalks, pedestrian safe havens, and clear crosswalks with audible and countdown signals. Outside of the right-of-way, future development along Broad should be mixed-use and built close to the sidewalk to encourage a more pedestrian-friendly environment. Implementation of this plan will require coordination with TDOT to evaluate possible design solutions. If adequate crossings at street level cannot be provided, pedestrian bridges in one or two places may be warranted.

North Highland Planning Study

Summary of Key Recommendations:

***Market Analysis
& Strategic Recommendations***

Prepared for Ragan-Smith and the City of Murfreesboro
October 28, 2016

Downtown Marketing and Development Concepts

Murfreesboro is now the fifth largest city in Tennessee, with a population of 150,000 plus a large university student enrollment, within a fast-growing county of 300,000. Murfreesboro deserves a downtown that reflects the growth of its population and economic base, as well as its stature as a major city and home to one of the state's largest universities. Ultimately, downtown Murfreesboro can extend beyond the Square and offer significant opportunities for shopping and entertainment, cultural venues, diverse housing stock, entrepreneurship and business development, civic space, historical context and tourism, all within a walk-able mixed-use urban environment. Downtown Murfreesboro can offer a "college town" feel but can also be much more than a college town. Key components of this concept are summarized below:

Arts & Entertainment District Development Scenario

The market analysis identified significant potential for more commercial entertainment, eating & drinking and other uses that can activate downtown Murfreesboro and create a destination for residents and visitors alike. An arts and entertainment district could be developed that builds on downtown's inherent strengths, its existing base of arts and cultural organizations and venues, and its market potentials. This district would be anchored by 180,000 to 200,000 square feet of performing arts, cultural, and entertainment venues, as well as restaurants, clubs, drinking establishments, and specialty retailers serving a young and diverse clientele. There would also be 10,000 to 30,000 square feet of office space, 50 to 80 residential units, and a hotel integrated into this mix.

Redevelopment & Vision for the Broad Street Corridor

Broad Street is Murfreesboro's "main street," and offers significant opportunities for redevelopment as a more urban and pedestrian-friendly boulevard through downtown. Broad Street can also be positioned as the "zipper" or link between downtown and the Historic Bottoms area, providing exposure and access to and between them. Broad Street is a prime location for hotels and mixed-use development. While the market potential for hotel development was not tested as part of this planning effort, hotels were identified as a market opportunity to fill a gap within the downtown area.

Rethinking Institutional Role in Downtown

There are opportunities for MTSU to extend more of its academic and institutional functions off campus to downtown Murfreesboro. Many other universities have developed strong linkages with the downtown core in their home communities, such as through relocation of programs like culinary arts and entrepreneurship training, retail uses like university bookstores, and public

venues like museums and performing arts facilities into downtown areas. The advantages for universities include direct public service training and exposure, enhanced marketing identity (a stronger downtown can help in marketing a university to prospective students and faculty), and revenue growth due to increased participation in institutional programs. Better physical linkages can also be provided between downtown and the campus.

County Government is expanding its presence downtown with new court facilities and offices, providing a strong anchor for downtown. There are additional opportunities to consolidate other government functions away from commercial space in order to free up space for active retail, restaurant, and entertainment functions.

Pro-Active Business Recruitment and Development

A program for business recruitment and development is recommended to strengthen downtown by targeting and attracting new development and businesses to the area. This program is described in more detail in the Appendix Report for this plan.

North Highland Neighborhood Concepts

Residential neighborhoods within the North Highland study area would retain and build on their historic ambiance as attractive urban communities. The market analysis identified growing market demand for walk-able urban neighborhoods near downtown Murfreesboro, generated by Millennial professionals, empty nesters, university faculty and staff, graduate students, and others.

Quality and Amenity Value

A key component of marketing and development among these residential communities is an emphasis on amenity value. Building on the historic character of these neighborhoods, their parks and open space, walk-ability and access to downtown and MTSU will be critical for marketing. There is a need to encourage small-scale infill retail development or rehabilitation of historic commercial spaces where the market supports such use, as these small businesses add amenity value for marketing walk-able residential neighborhoods. Not all commercial spaces will be viable, but where traffic is sufficient or where there are higher-density housing developments within walking distance, there will be opportunities for small-scale retail uses such as personal service establishments (hair salons, shoe repair), small convenience stores and cafes, or art galleries and other destination-oriented small businesses.

Branding

It will be important to establish or re-establish names for each of the individual neighborhoods (e.g., “Oaklands”) within the North Highland study area, to help in strengthening identity, building market, and attracting high-quality infill development.

Infill Development

The City should encourage infill residential development that strengthens the historic character of surrounding housing and North Highland neighborhoods. Again, an emphasis should be on quality. The market analysis suggests demand for single-family, zero-lot line, and townhouse development within these residential neighborhoods. There is also the need to encourage some “corner” infill retail development and where possible, rehabilitation of older neighborhood commercial spaces as noted above to build amenity value.

Highland Center Development Scenario

The medical office complex located on North Highland should be master planned for gradual redevelopment as a mixed-use housing development with ancillary office and retail space. The market analysis supports development of 100 to 130 medium-density housing units, such as townhouse condominiums, zero-lot line homes and other “maintenance-free” housing geared to empty nesters and young families. The market analysis also supports integration of 90,000 to 100,000 square feet of office space at this location, including upgrading of existing space. About 10,000 to 13,000 square feet of ancillary retail uses such as coffee shop, pet store, personal services, etc would also be supportable at this location. Ultimately, the area would be marketed and developed as an alternative, higher-density and walk-able location for those who do not want a large yard to maintain.

Housing Rehabilitation Programs

There is a need for rehabilitation and upgrading of existing housing, in addition to development of infill housing projects, in portions of the study area west of North Highland. Stronger enforcement of existing building and occupancy codes is encouraged in tandem with provision of a package of incentives. The incentives would help encourage property owners to upgrade their properties or promote infill development to avoid further code enforcement.

Marketing Strategies

General marketing strategies are provided herein as a guide for more detailed marketing plans and revitalization strategies. Several of these strategies capture some of the recommendations made for individual concept areas discussed above.

Build Amenity Value

As noted earlier, there is a need to build amenity value to support housing and tourism development in the area. Key components of this strategy relate to development of retail and mixed-use amenities, strengthening of existing tourism assets, creation of more music venues and events, enhancing existing greenways and other components.

Establish Destination Marketing

Marketing strategies focus on establishing destination draw to help build market support for retail/commercial and tourism uses in the downtown area. Such uses in turn help strengthen the market for housing and employment-generating office uses in downtown Murfreesboro.

A key component of the destination marketing strategy relates to designation and development of an arts & entertainment district (portions of which may straddle the line between North Highland and Historic Bottoms).

Another key component of this strategy is expansion and strengthening of the tourism offering in the downtown area, including Oaklands, Cannonsburgh, Discovery Center, Stones River, various music venues, hotels and tourism services.

Finally, there is the need and opportunity to establish an entrepreneurial development district that incorporates the downtown and Historic Bottoms areas that can accommodate and support information technology, design, artisanal manufacturing, and similar companies that show a preference for these types of urban locations. The office market analysis determined that there is significant untapped potential for space to accommodate these emerging design and technology uses in addition to finance, insurance, real estate, government, non-profit and other uses. A program of incentives coupled with facilitation and business recruitment is recommended to help capture this opportunity for downtown Murfreesboro.

Development and Financing Strategies

Several strategies have been developed for development and financing to effect change in support of the proposed plan. Several of these strategies are summarized below and are discussed in more detail in the Appendix Report.

Preserve/Celebrate Historic, Cultural and Natural Resources

There is a need identified as part of the marketing strategy for preserving and celebrating the area's historic character. In order to encourage preservation, incentives are recommended that focus on adaptive use of existing buildings for maker space, neighborhood retail, live/work residential and other uses. Façade grants and PILOT programs are among the recommendations for encouraging preservation and sensitive infill development in the study area.

Target Business Development

There are a number of programs and incentives proposed to assist in business recruitment, retention and development in the downtown area and in the Historic Bottoms. Among these incentives are small business & entrepreneurial development business loans and grants, infrastructure improvements, and creation of a downtown-area Tax Increment Financing (TIF) district to support infrastructure and capital investment. Broad Street would become a focus for redevelopment in the downtown area, because of its undervalued land with excellent exposure and potential for various types of commercial and mixed-use development. Urban design improvements are recommended for Broad Street, the Arts & Entertainment District, and Historic Bottoms to help strengthen identity branding, business recruitment, and marketing. A pro-active business and developer recruitment strategy is also recommended that focuses on downtown Murfreesboro and the Historic Bottoms.

Affordable Workforce Housing

The residential market analysis identified a clear need and strong market for workforce housing in central Murfreesboro to support business and economic development in the city. Attractive, affordable housing resources can help attract and retain a labor force in support of job creation. Importantly, the already high-density downtown and Historic Bottoms areas provide opportunities for multi-family housing and mixed-use development that has no direct impact on other residential neighborhoods in the city.

In fact, higher-density housing development in the downtown area can help take some of the development pressure off of suburban neighborhoods while still providing a needed product for young professionals and other workers in Rutherford County's growing labor force. Finally, higher-volume housing development in the downtown area and Historic Bottoms can help strengthen the built-in market for walk-able downtown retail and businesses located in Murfreesboro that are desired by the general population.

Key tools for leveraging in development of affordable workforce housing include the use of a TIF district (described above) along with density bonuses

and other planning and regulatory tools. The City can also assist with site assembly, structured parking and infrastructure as well as facilitation to encourage more diverse and inclusionary housing development in the downtown area.

Management Strategies

In order to effect change and implement marketing, development and financing strategies, there are also recommendations provided for management mechanisms to assist in these efforts. Some of these strategies are summarized here, with more detail provided in the Appendix.

City Development Agency or Division

It is strongly recommended that the City of Murfreesboro establish a municipal development agency, or a division within the planning department, with authority to manage and promote development, financing, and business development in the city. This agency or division would have the authority to manage a tax increment financing (TIF) district, recruit and negotiate with developers and businesses, manage financial or fiscal incentives, and work with the Community Development department on workforce and affordable housing issues.

Downtown Business Improvement District (BID)

Murfreesboro should also consider creation of a Downtown Business Improvement District (BID) with the approval of the required majority of property owners, to manage marketing, safety, security, parking, cleanliness and other aspects of downtown management. This entity would be self-funding in the same way as other BIDs across Tennessee (like Downtown Nashville's) and nationwide. The BID would also work with Main Street on strengthening marketing initiatives and providing financial, management and technical support to Main Street for some of its marketing and event initiatives. The BID would also work with the proposed City Development agency on development initiatives, leasing, assembly, preservation, and other efforts to encourage development and investment in the downtown and Historic Bottoms areas.



A retail market analysis was conducted to determine the existing and future potential for retail businesses and development in the Downtown/North Highland area. Key findings are summarized below and detailed in the Appendix Report.

Existing Conditions:

Existing Study Area Retail Business Inventory by Type



Existing Retail Conditions:

The Downtown/Highland area has about 440,000 square feet of existing retail use in 140 businesses, including 140,000 square feet in shopper's goods (products for which consumers comparison shop). 114,000 square feet in 81 personal service establishments (hair and nail salons, tattoo parlors, etc), 52,000 square feet in convenience uses, 44,000 square feet in entertainment, and 44,000 square feet in eating and drinking establishments.

The Square has significant office use (lawyers and government offices) in ground-floor spaces, reducing overall pedestrian activity and consumer exposure in Murfreesboro's prime commercial node. Interviews with various businesses indicate that sales are increasing, albeit slowly, but they are looking for more destination appeal beyond their traditional market base. Several long-time businesses survive based on a dependence on aging but loyal customers. It's difficult for one or two restaurants or specialty shops to survive without being part of a larger cluster of businesses that establishes downtown as a destination. There is some new excitement on the Square, with the opening of new restaurants including a local Puckett's, an ice cream shop and game business.

About 44,000 square feet of retail space is currently vacant in the area, yielding a vacancy rate of 10.0%. This vacancy rate is relatively high for centrally-managed retail shopping centers, but for disperse retail space located in older and sometimes functionally obsolete buildings, a higher vacancy is not unexpected.

Potentials:

Type of Good	Gross Demand (SF)		Existing Uses	Warranted Demand
	2016	2021		
Convenience	108,700	126,396	52,224	73,161
Shoppers Goods	273,763	306,491	139,683	216,808
Eating/Drinking	101,834	133,962	43,633	85,018
Limited Service	22,222	37,222	17,594	19,739
Full Service	83,089	72,593	26,349	46,244
Entertainment	56,147	137,149	44,076	83,070
Personal Services	43,260	82,427	114,348	(61,022)
TOTAL	623,711	802,416	394,277	406,138
Existing vacant			42,801	
Net New Space				364,238

Source: Retail Sites, Development Economics.

Type of Business	Square Feet
Multi-Use Entertainment Center	100,000
Full-Service Restaurants	32,000
Drinking Places	15,344
Specialty Shops	6,000
Pharmacies, Cosmetics	18,000
Furniture Art, Galleries, Antiques	12,000
Urban Outfitters, Anthropologie, Fitness, Yoga	30,000
Outdoor Sports Rec. Bldg	4,000
Book, Music	4,000
Opt., Antiques, Novelty Stores	16,000
Toy/Hobby Store	10,000
Bookstore	10,000
Breakfast Cafe	7,500
Specialty Food Stores	12,000
Jewelry, Accessories, Shoes	10,000
Office Supply	5,000
Florist	3,000
Expanded Art Supply	5,000
Total	307,990

Downtown/Highland Retail Potentials:

Retail potentials were forecasted for the Downtown/North Highland area through 2021 based on an analysis of existing market conditions, demographic forecasts within the retail trade area(s), competitive market conditions, and other factors. It was determined that the Downtown/Highland area will generate potential for about 400,000 square feet of warranted additional retail, restaurant, personal service, and entertainment use within the next five years.

There would be potential for about 219,000 square feet of shopper's goods stores, 93,000 square feet in entertainment, 85,000 square feet of eating and drinking space (including nearly 50,000 square feet in full-service restaurants), and 73,000 square feet of convenience goods space. There will be an oversupply of personal services establishments such as hair and nail salons, at least in the near term.

Recommended Retail Tenant Mix:

Based on the findings of the Market Analysis, a recommended tenant mix is provided to inform broader marketing, management and development strategies explained elsewhere in this plan. The recommended tenant mix includes a target of about 310,000 square feet of net new retail uses, with an emphasis on entertainment (80,000 to 100,000 square feet of entertainment uses), full-service restaurants, and urban-scale general merchandise or department stores that target a young, college-educated niche market (e.g., Urban Outfitters, Anthropologie, etc).

Other target uses include specialty food stores (e.g., ethnic or organic groceries), gifts/antiques and novelties stores, jewelry/accessories and shoe stores, toy & hobby store, women's clothing boutiques, drinking places, pharmacies/cosmetics, home furnishings, outdoor sports & recreation, and other businesses. Overall, the recommended mix of businesses would target a younger professional niche market, college students/graduates, day trippers (from Nashville or surrounding counties), and others.



The residential market potentials for the Downtown & North Highland Area were forecasted based on analysis of demographic forecasts among various niche markets including university-related drivers, housing market conditions, and competitive context. The demand for different types of housing products and price ranges was forecasted as a basis for housing recommendations in the plan.

Existing Conditions:

Table. EXISTING RENTAL MARKET CONDITIONS, NORTH HIGHLAND/DOWNTOWN MARKET AREA, 2016						
Sub-Market	Units	Vacant	Rate	Ave Rent	Units UC	
Murfreesboro	10,027	480	4.8%	\$ 1,019	1,058	
Smyrna/Lin	3,449	280	8.1%	\$ 933	24	
TOTAL/Ave	13,476	740	5.5%	\$ 997	1,080	
Market	87,284	4,730	5.4%	\$ 1,050	14,741	
Share	15.4%	15.6%	101.3%	95.0%	7.3%	
Sources:	Real Data and Randall Gross / Development Economics.					



Potentials:

Table. RENTAL HOUSING POTENTIALS, NORTH HIGHLAND AREA, 2016-2021				Table. FOR-SALE HOUSING POTENTIALS, NORTH HIGHLAND AREA, 2016-2021			
Rent Range	Area Capture		Market Rate	Price Point	Area Capture		Market Rate
	Moderate	High			Moderate	High	
\$ 200	78	83	-	\$ 100,250	11	13	-
\$ 400	55	73	-	\$ 150,250	27	38	-
\$ 600	43	77	-	\$ 210,750	41	73	58
\$ 900	32	127	35	\$ 281,250	23	40	35
\$ 1,300	22	184	107	\$ 343,750	7	58	11
\$ 1,800	14	90	33	\$ 437,500	27	134	80
\$ 2,500	28	70	49				
\$ 3,000	22	104	68				
TOTAL	375	625	220	TOTAL	138	321	165
Workforce	177	249					
Sources:	U.S. Bureau of the Census; Nielsen; and Randell Gross / Development Economics.			Sources: U.S. Bureau of the Census; Nielsen; and Randall Gross / Development Economics.			

Existing Market Conditions:

The combined Murfreesboro/Smyrna-Lavergne (M/SL) housing market has about 14,000 rental housing units in competitive properties throughout the area. This inventory constitutes about 15.4% of the overall Nashville-area rental housing market. There are about 740 vacant rental housing units in the M/SL market, yielding a healthy vacancy rate of 5.5%. This vacancy is relatively consistent with the market as a whole. Rents, however, tend to be lower in the M/SL market than in other parts of Nashville, with an average of \$997 versus \$1,050 market-wide.

More importantly, the M/SL market only has about 1,080 units currently planned or under construction, which constitutes just over 7.0% of the Nashville-area market or about one-half of the expected number (if based on overall inventory). The lack of multi-family housing construction in the Murfreesboro market suggests a shortfall in meeting current market demand, given the rapid increase in employment within this same market. In general, employment growth fuels demand for rental housing, since many professionals and other workers settle in rental housing first before moving up to purchase housing.

Both the number of housing units sold and the median sale price have been increasing in Murfreesboro. The number of sales fluctuates with the seasons but has increased year-on-year since the end of the recession. Median prices have increased on average from about \$150,000 in January 2013 to \$220,000 by April 2016, an increase of nearly 50% in just three years.

Downtown/Highland Housing Potentials:

The market analysis forecasted potential for both rental and for-sale housing products in the Downtown and North Highland area. Total demand for up to about 625 rental housing units was forecasted through 2021 for the study area. However, a substantial share of this demand would be generated by households with less than the median household income for Rutherford County. Thus, demand for up to about 250 "workforce" housing units was forecasted as a share of the total demand. Demand was forecasted by rent range, based on the amount of housing that would be affordable for each income level. The largest share of market-rate rental units would be generated in the \$900 to \$1,300 rent range.

Similarly, potential for up to about 320 for-sale housing units was forecasted for the study area through 2021. This number also includes workforce housing. Demand for about 100 to 125 market-rate units would be generated within the near term. Demand was forecasted by price point, with market-rate prices ranging from about \$218,000 to \$437,000.



A Market Analysis was conducted to determine the potential of the North Highland area for office development. The complete findings from the market analysis are found in the Appendix report attached to this plan.

Existing:

Sub-Market	Total SF	Occupied	Vacant	Vac Rate	Ave Rent	Ave Age
Murrieffed	453,676	403,848	59,828	12.9%	\$ 14.98	1995
Gateway/Medical Ctr	603,010	602,400	206,620	27.7%	\$ 18.17	2004
West Murfreesboro	63,251	59,902	13,349	16.0%	\$ 15.00	2004
Southeast	69,010	75,920	23,450	23.7%	\$ 14.50	1999
CBD / Highland Area	1,160,542	743,028	417,454	36.0%	\$ 13.00	1992
Smyrna	172,816	100,466	72,118	41.9%	\$ 14.38	2002
TOTAL	2,892,343	2,045,395	836,748	29.0%	\$ 16.03	1992

Notes: Based on detailed CBD inventory plus market listings for sub-markets. Includes downtown space that is functionally obsolete or otherwise non-competitive. Excludes Government offices.

Sources: Rutherford County Assessor, Commercial Brokers, LoopNet, Web sites, Main Street, and Randall Gross / Development Economics.

Potentials:

Factor	Office Potentials in Square Feet		
	2016-2021	2021-2025	TOTAL
Employment-Driven Demand	367,601	322,754	690,354
Absorption-Based Demand	300,500	332,778	633,278
Average	334,000	328,000	662,000
Historic Performance	15.9%	15.9%	15.9%
Expected Capture	53,000	52,000	105,000
Target Potentials	21.5%	30.9%	25.1%
Targeted Capture	71,500	101,500	173,000
Source	Randall Gross / Development Economics.		

Downtown/Highland Office Potentials:

The market analysis forecasted potential for development of about 170,000 to 200,000 square feet of new office space within the competitive market. These forecasts were completed based on analysis of employment and industry sector projections, absorption trends, emerging labor force, and competitive positioning in the market. Despite the high vacancy in existing space, downtown has very little Class A office space available to attract or recruit the types of companies that are driving demand in the area. Key target tenants for this space would be move-ups among FIRE and legal firms; but also companies with young workers including administrative services & business process outsourcing, business & professional services, and management services (including headquarters offices).

Existing Market Conditions:

The Murfreesboro-Smyrna Office Market was inventoried and analyzed for this planning effort. It was determined that this market has about 2.9 million square feet of competitive multi-tenant office space. There are six sub-markets that were identified and defined for this study. The largest of these sub-markets is the Downtown Murfreesboro/Highland Area, which has about 1.2 million square feet of office space. Nearly 420,000 square feet or 36.0% of this space is vacant, based on data collected through the County Assessor, field reconnaissance, and brokers. The inventory excludes Government offices.

Downtown-area rents are averaging about \$13.00 per square foot, which is the lowest among all sub-markets in the Murfreesboro-Smyrna area. The overall average rent is \$16.00 per foot. Much of the downtown space is functionally obsolete or otherwise non-competitive. The average downtown building was built in 1992 and is over 64 years old. This compares with the market average of 34 years (built in 1992) and with Gateway buildings built on average in 2008. Not surprisingly, Gateway rents are much higher, at nearly \$20.00 per square foot. Vacancy in Gateway buildings is also relatively high, but only because many are newer buildings still in lease-up.

Downtown-area office tenants tend to be oriented to finance, insurance and real estate (FIRE), accounting for more than half of the total. However, law firms also comprise a substantial share (12%) of downtown space and tend to take up ground-floor retail spaces.

Downtown Area Office Tenancy

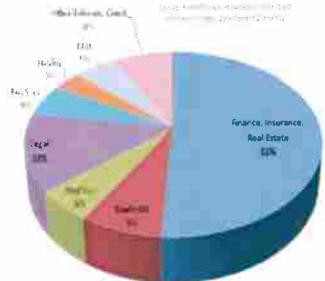




Table. AT-PLACE EMPLOYMENT TRENDS, RUTHERFORD COUNTY, 2009-2015

Industry			2009-2015 Change		
	2009	2015	Number	Percent	Per Year
Mining/Construct	3,471	4,252	781	22.5%	3.2%
Manufacturing	17,042	25,273	7,031	40.9%	5.8%
Utilities	201	730	442	151.9%	21.7%
Wholesale	4,655	5,406	749	16.1%	1.2%
Retail	11,959	13,593	2,634	22.0%	3.3%
Transport/Whse	3,751	5,455	1,704	45.9%	6.3%
Information	2,997	2,600	(311)	-10.4%	-1.5%
Finance/Insurance	2,965	3,565	600	20.2%	2.9%
Real Estate	1,024	1,206	182	18.2%	4.6%
Prof/Tech Svcs	2,155	2,459	304	14.1%	3.3%
Mgt Svcs	785	903	118	15.0%	2.1%
Adm Support	6,004	10,164	2,160	27.0%	3.9%
Education	487	694	207	42.3%	5.2%
Health Care	7,659	13,401	5,742	74.9%	10.0%
Accom/FS	6,310	12,309	3,559	40.4%	5.8%
Arts/Entertainment	754	965	201	26.6%	4.1%
Other Svcs	1,639	2,062	223	12.1%	1.7%
Govt/Education	13,317	16,023	3,456	26.2%	3.7%
TOTAL	92,666	122,436	29,773	32.1%	4.6%
Note	Nonfarm employment only.				
Sources	Tennessee Department of Labor and Workforce Development and RandoGross Development Economics				



Murfreesboro and Rutherford County form part of the vibrant Nashville-area economic base. Rutherford County is among the fastest-growing job markets in the country, with the U.S. Bureau of Labor Statistics ranking Rutherford fourth out of 3,144 counties nationwide in job growth from 2015 to 2016. That job growth has been accelerating, with the county's overall employment base up by one-third in only six years (for an average growth of 4.5% per year), as compared with a growth rate of 1.5% from 2000 to 2010.

Rutherford County has seen rapid job growth in nearly all sectors, especially in manufacturing, health care, accommodation services, education, administrative services, retail trade, and transportation services.

The city of Murfreesboro has also experienced rapid economic growth in recent years, with employment up by 5.5% per year on average since 2002. Much of that growth has been concentrated in health care services, accommodation, retail trade, and information services. The City and County have worked pro-actively to encourage growth such as through the establishment of the new Gateway medical and corporate node.

While the city and county are experiencing unprecedented economic growth, population and household growth are actually slowing in both the city and the county. Between 2000 and 2010, the city experienced annual population growth of 5.8%, but that growth rate fell to only 2.8% per year between 2010 and 2014, according to Census data. Similarly, the county's annual population growth rate fell from 4.4% (2000-2010) to 2.5% (2010-2014).

Some of this shift in growth is healthy, in that Murfreesboro and Rutherford County residents have an increasing array of job opportunities near home, and new commercial and industrial development helps support their tax base. On the other hand, slower household growth can translate into static labor force growth, which could put the brakes on economic expansion.