



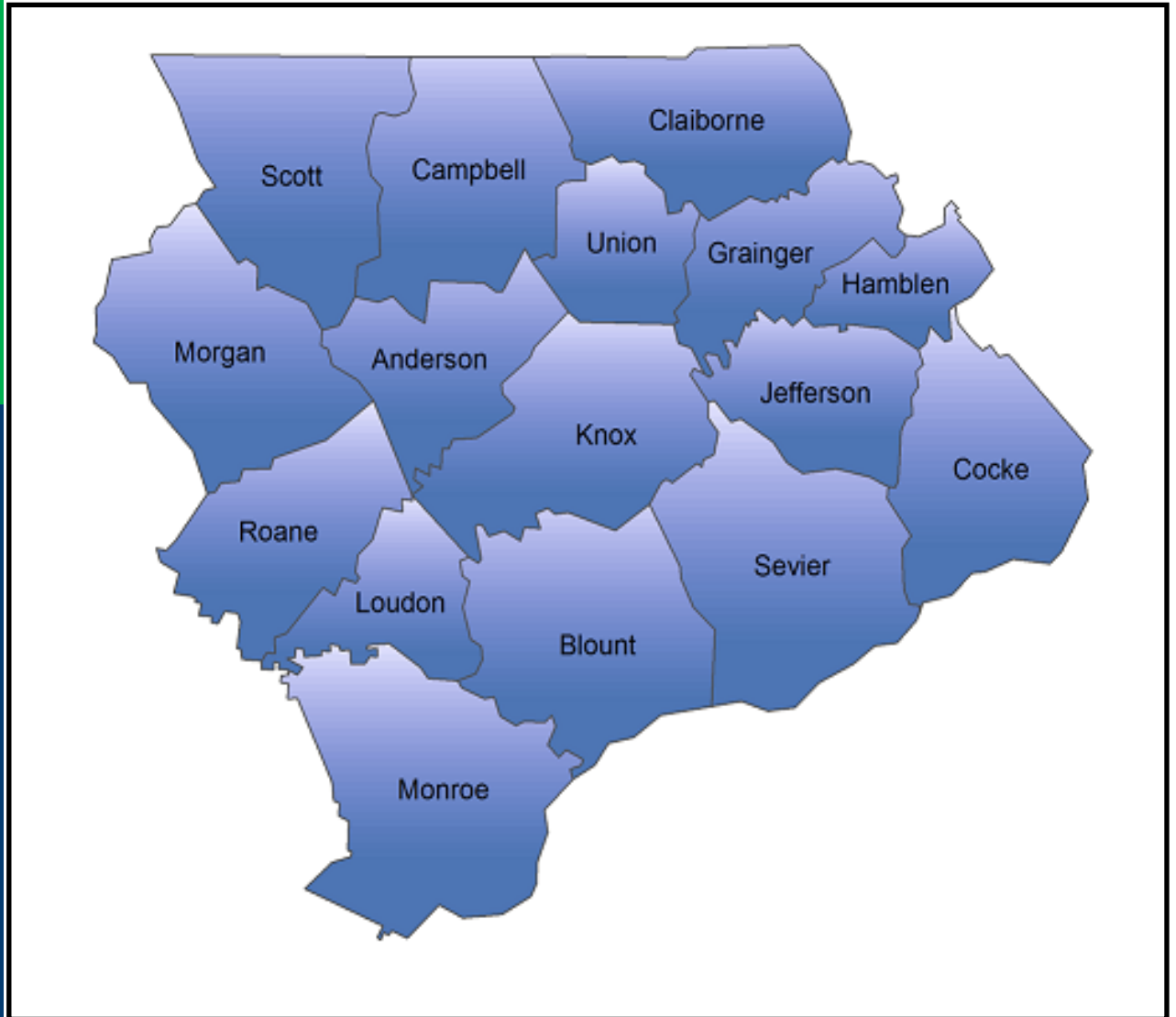
EAST TENNESSEE DEVELOPMENT DISTRICT

2018-2021

**Comprehensive Economic
Development Strategy
(CEDS)**

East Tennessee Development District
216 Corporate Place
P.O. Box 249
Alcoa, Tennessee 37701-0249

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Economic Development/CEDS Subcommittee

Tim Thompson, Chair	Anderson County, EDA
Don Mull, Vice-Chair	Mayor of Alcoa
Trey Dykes	Member-at-Large
Mike Patterson	East Tennessee Human Resource Agency
Beth Phillips	UT Institute for Public Service
Ken Yager	State Senator
Andy Wallace	Deputy Mayor of Campbell County
Bob Freeman	Citizen member
Bob Thornton	Baker Realty
Robert Campbell	Robert Campbell & Associates
John Allen	Hatfield and Allen
Mike Arms	ATVG/Public Strategies
Bill Walker	Workforce Investments Area 4 Staff
Allen Newton	Sevier County Economic Development Council
Richard Kirkland	Monroe County Economic Development Director

Cooperation of Efforts *Awareness of Issues * Convenience of Services

Introduction

East Tennessee Development District and CEDS



The *East Tennessee Development District (ETDD)* is a voluntary association of municipal and county governments that are located in the Mideast region of Tennessee. Organized in 1966, the East Tennessee Development District continues to be a vital force in helping local governments plan for the future by coordinating the establishment of regional and local priorities within the fields of economic and community development.

- *Community Development*: Includes assisting communities with local planning, grant opportunities, historical preservation, housing, transportation, and solid waste.
- *Economic Development*: Includes industrial recruitment and expansions, strategic management, project financing, existing industry outreach, and small business lending.

As a development district, ETDD serves the largest number of counties in Tennessee. *Sixteen counties and fifty-six municipalities* are supported with community planning, development services and targeted resources, while also serving as a forum for local governments to solve common challenges associated with economic development and growth in both urban and rural communities.

ETDD service counties include: *Anderson, Blount, Campbell, Claiborne, Cocke, Grainger, Hamblen, Jefferson, Knox, Loudon, Monroe, Morgan, Roane, Scott, Sevier and Union.*

Since the development district boundaries encompass multi-county areas, ETDD is able to focus on issues of regional importance – on issues that impact more than one city or county.

The 2018-2021 CEDS report is a *strategic three-year plan* that assesses current status and identifies resources and services that support regional economic and community stability and prosperity.

As presented on the previous page, the *CEDS committee* consists of duly appointed, local elected officials, business and workforce development leaders. The CEDS committee is responsible for developing, reviewing and editing the report prior to dissemination to the ETDD Executive Committee.

An *extensive public review* is conducted to allow the impacted communities input opportunity. Any public comments are recognized and addressed.



The final copy of the CEDS is transmitted to the State of Tennessee and the Appalachian Regional Commission for approval. The completed CEDS is submitted to the

Economic Development Administration and accessible via the ETDD website: www.etdd.org

This report is comprised of four main elements:

- 1) Summary of economic conditions of the area
- 2) Analysis of the regional Strengthens, Weaknesses, Opportunities and Threats (SWOT)
- 3) Strategic plan aligned with the SWOT
- 4) Evaluation framework

Any conversations or questions concerning this report are welcomed. Please contact Mr. Terry Bobrowski, ETDD Executive Director, 865-273-6003.

PRIMARY MISSION

Provide Planning Services within the fields of Economic and Community Development to the local governments

Summary

Demographics and Socioeconomics

Demographics

Per the 2017 Census information, the estimated population the State of Tennessee (6.7 million) experienced a 5.8% growth from 2010. The sixteen county ETDD area contains approximately 1.2 million people. Ten of these counties experienced positive population growth rates higher than the state average. Sevier (8.8%), Loudon (7.4%) and Knox (6.8%) counties experienced the largest population growth with Campbell (-2.6%), Roane (-2.1%) and Claiborne (-1.9) experiencing the largest negative population trends¹.

On average, the racial makeup of the entire district is, and has been, relatively consistent. The majority of the population is white (91%), followed by Hispanic/Latino (4%) and African Americans (3%). Scott (6.4%) and Hamblen (6.1%) counties have the highest percentage of children under 5 years old with Loudon (26%) and Roane (23%) housing the highest percentage of persons 65 years old and older. Loudon and Hamblen counties have the highest percentages of foreign born residents and residents who speak a language other than English at home¹.

Socioeconomic Data

The poverty rate for the State of Tennessee is 15%. Seventy percent of ETDD counties are at or above the state poverty rate. Claiborne (25%), Scott (24%) and Cocke (24%) experience the highest rates of poverty in their communities with Loudon and Blount at the lowest rates of 11%. Thirteen (80%) ETDD counties have median household income levels lower than the state average of \$46,574. Knox County has the lowest percentage of owner-occupied housing

units at 64% (\$164,000 median value of housing) with Morgan having the highest percentage of owner-occupied housing at 81% (\$94,300 median value of housing)¹. Loudon County has the highest percentage of median housing costs at \$191,000 with Scott County at the lowest percentage of median housing costs at \$70,767³⁶.

The state unemployment rate is 3.4%². Knox (2.4%) and Blount (2.5%) counties have the lowest unemployment rate with Cocke (6.5%) and Sevier (6.1%) experiencing the highest unemployment rate³. Due to current industry expansions, Scott County experienced the greatest degree of positive change in employment rates, moving from 8.1% unemployment in January 2017 to 4.8% unemployment in January 2018⁴. Among the 89 counties in Tennessee with employment below 75,000, only Roane County (\$1,355) had an average weekly wage above the national average (\$1,152). Sevier (\$570), Union (\$616) and Cocke (\$661) counties had the lowest average weekly wage reported for the first quarter of 2018¹³.

In Tennessee, 11% of the residents are without health insurance. Over 50% of the ETDD service counties have residents at or above this state rate. Hamblen (13%) has the highest rate of residents without health coverage, with Union, Monroe, Loudon and Grainger (12%) following. Seventy-five percent of ETDD counties have residents under the age of 65 who have a disability higher than the state average of 11%. Scott and Campbell (18%), Grainger and Cocke (17%) have the highest rates of residents in this category. Knox (9%) and Blount (10%) have the lowest rates of reported disabilities¹.



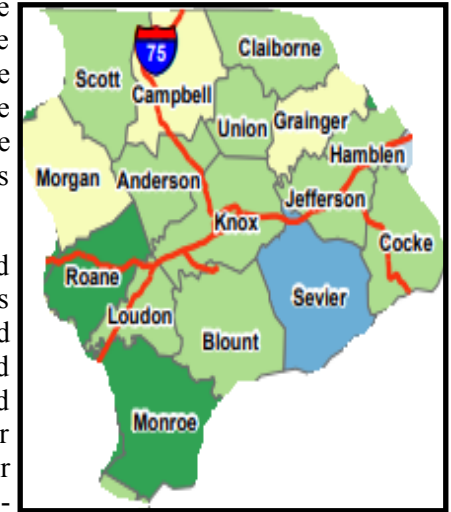
Summary

Infrastructure , Transportation and Utilities

Infrastructure

State of Tennessee: One of the greatest fiscal challenges facing our elected officials is dealing with aging infrastructure. The estimated cost of all needed public infrastructure improvements in Tennessee increased for the second straight year. Of the \$2.0 billion increase in infrastructure needs reported in this year's inventory, more than \$1.7 billion (84.6%) is attributable to increases in Education and Health, Safety, and Welfare needs, continuing a three-year trend of driving the overall increase in the inventory. The need for both clean water and jails accounts for most of the increase in the Health, Safety, and Welfare category. Information about funding for public infrastructure needs reported by officials indicates that 68.9% of the funds required to meet those needs was not available at the time the inventory was conducted, up slightly from last year's 63.4%⁵.

ETDD Counties: ETDD is attentive that an effective public infrastructure is dependent upon a skilled labor force, advanced technological resources, strong workforce development facilities with reliable water supply, wastewater treatment capacities and a communication structure that supports the needs of today and future industries. For the upcoming five-year period (2016-2021), Knox County (\$3,593,546,322) has the highest total estimated cost for infrastructure improvements, followed by Blount (\$816,350,897) and Sevier (\$659,405,512). Relative to their populations, counties with small populations need just as much or more infrastructure than counties with large populations. Of the sixteen counties served by the ETDD, over 80% have infrastructure needs from \$1,000-\$2,000 (light green), \$2,000-\$3,000 (dark green) to \$4,000- \$5,000 (blue) per capita. Sevier (\$4,000-\$5,000) has the highest total infrastructure costs per capita, followed by Roane and Monroe (\$2,000-\$3,000)⁵.



Transportation and Utilities

State of Tennessee: Transportation and Utilities is, and always has been, the largest category of infrastructure in the inventory and totals \$24.8 billion this year—55.0% of the inventory. Transportation alone, at \$24.2 billion, accounts for nearly all of this category and is larger than all other categories in the inventory. In 2017, the Improve Act raised taxes on gasoline and diesel fuel by 6 cents and 10 cents respectively, over a three-year period. Increases in the state's gasoline and diesel tax revenues will help pay for Tennessee's highly publicized \$10.5 billion transportation backlog, which includes only projects that have been approved by the General Assembly and are either in the planning and design or construction stage¹. Tennessee has also created an initiative to develop a statewide plan for future water availability. This plan, TN H2O, will assess current water resources and recommendations to ensure support for economic growth⁷. Roughly a quarter of Tennessee's rural families are without any kind of broadband access, while 23% of the total population reports that they lack a high-speed internet subscription⁶.

ETDD Counties: For the upcoming five-year period (2016-2021), transportation and water/wastewater are consistently in the top infrastructure needs of the majority of ETDD counties. In this year's (State) inventory, the estimated cost of needed water and wastewater infrastructure increased \$445 million (10.5%) and now totals \$4.7 billion. This increase is mainly caused by the addition of large projects in East Tennessee (*Anderson*, *Hamilton*, *Knox*, and *Sevier* counties). The 2018 Utility Rate Survey shows that there was a 1.5 % increase in water rates, a 3.47 % increase in wastewater rates, a 4.74% increase in gas rates. Tap fees range between \$900 and \$1,307 water and wastewater respectively. Needs reported for other utilities increased by \$200 million (65.7%) in this year's inventory and now total \$504 million. Most of this increase is attributable to the addition of \$153 million needed to replace transmission lines throughout the Knoxville Utilities Board's service area⁵.

Summary

Education and Industry Partnerships

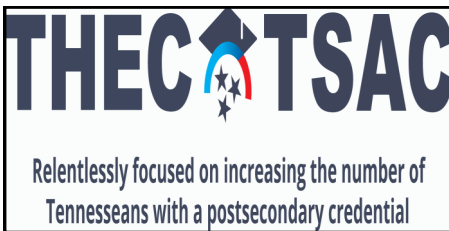
Education



Education Commissioner Candice McQueen announced that the 2017-18 high school graduation rate held steady at 89.1%, which is the highest graduation rate on record for Tennessee. This year, more than 56% of districts with high schools saw their graduation rates improve when compared to last year's rates. All ETDD county schools surpassed the state

graduation average with Morgan (99%), Scott (97%) and Grainger (97%) securing the highest graduation rates. Alcoa City Schools, located in Blount County, achieved a 99% graduation rate, with Maryville City Schools, also located in Blount County achieving a 97%⁸. Loudon County, Alcoa and Maryville City School have earned the school achievement highest distinction of Designated at Exemplary, with six ETDD county schools and five city schools within the service counties earning Designated as Advancing. Out of the 89% of Tennessee students who entered 9th grade in 2012 and graduated from high school in 2016, 63% of those graduates enrolled in a postsecondary institution in the summer or fall following graduation.

Postsecondary Education and Training



Tennessee high school graduates enrolled in large numbers at public community colleges and public universities, with Pelissippi State Community College (Knox, Blount, Jefferson counties) and University of Tennessee, Knoxville (Knox County) consistently leading with the top

enrollment classes. Offering free postsecondary education to partnering with employers on workforce training programs to identifying skills gaps, Tennessee is tackling the challenge of industry's short- and long-term labor force needs.

The initiative of "Drive to 55," has the goal of equipping 55% of Tennesseans with a college degree or certificate by 2025 through Tennessee Promise and Tennessee Reconnect. Tennessee Promise is last-dollar scholarship funding designed for Tennessee high school graduates to obtain two years of tuition-free education at any of the state's 13 community colleges or 27 colleges of applied technology. Tennessee Reconnect extends that promise to all Tennessee adults wishing to go to college for the first time or return to finish a degree.

Career Clusters

According to a new analysis by the Tennessee Department of Education, Tennessee Higher Education Commission, and Tennessee Department of Labor and Workforce Development, seventy-five percent of programs of study offered by districts in the 2017-18 school year are aligned with regional workforce needs. According to this analysis, the programs of study with the most aligned in-demand occupations are residential and commercial construction, machining technology, and mechanical, electric, and plumbing systems. Forty-seven percent of the 2016 high school graduates concentrated in a CTE career cluster by taking at least three courses within a program of study. The most common career clusters were health science, human services, and agriculture¹⁰.

Partnering Industry

The state, educational institutes and employers have partnered to make positive things happen for companies and employees alike. For example, three big auto-related employers (Nissan, Volkswagen, and Bridgestone) have each partnered with Tennessee Colleges of Applied Technology to ensure better-prepared workers. The ability to partner with the College of Applied Technology in Morristown (Hamblen County) for training helped attract a Belgian bus maker, Van Hool, to Morristown bringing a 640-job opportunities⁹.

Reference sources noted end of document

Summary

Employment Clusters

Employment/Career Clusters

The 16 career clusters are all represented throughout the ETDD region. The most impactful employment pathways within those clusters include:

→ *Education/Training*: Located in Knox County as the flagship state university and medical center, the University of Tennessee's five campuses enrolls over 50,000 students statewide, creates over 35,000 jobs, generates \$1.7 billion/annual income and secured over \$480M in research/funding in 2017¹⁵. Within the ETDD counties, there are approximately ten post-secondary institutions that not only provide career training for the residents, but also provides employment for numerous residents.

→ *Health Sciences*: With approximately 23 hospitals, psychiatric and medical centers, as well as numerous research, pharmacology, primary and specialty care practices, the ETDD service area not only benefits from access to quality healthcare, but also has strong employment and career opportunities within this field¹⁶. The Bureau of Labor Statistics has stated that healthcare jobs are "expected to have the fastest employment growth and to add the most jobs between 2014 and 2024."

→ *Agriculture, Food and Natural Resources*: Farming dominates the State's landscape, with 77,300 farms covering 10.8 million acres, or 41% of the State's 26.4 million land acres. Tennessee ranks eighth in the number of farms. The number one commodity in terms of cash

receipts is cattle and calves, followed by soybeans, broilers, nursery crops and corn. The mountainous East Tennessee region agriculture produces mainly cattle, hay, goats, vegetables (tomatoes), and tobacco¹⁸. The state is second in the nation in meat goat inventory, ninth in beef cattle¹⁹ and ranks in the top five states in production of tobacco, fresh market tomatoes, and snap beans¹⁸.

→ *Government/Public Sector and Science, Engineering Technology and Math*: The Department of Energy's impact on Tennessee totaled \$5.6 billion last fiscal year, according to a new study by the East Tennessee Economic Council. During the fiscal year, spending by DOE and its contractors increased the state gross domestic product by about \$3.4 billion. The federal reservation's quickly evolving facilities require flocks of skilled laborers. Y-12 National Security Complex in Oak Ridge has begun constructing the \$6.5 billion Uranium Processing Facility, which is the largest construction project in the history of the state²⁰. The counties of Anderson, Roane, Knox and Loudon support the employment needs of these national laboratories, research facilities and technology based companies.

→ *Manufacturing*: In 14 of the 16 ETDD counties, skilled production workers have the highest occupation cluster employment²⁹.

Automotive Parts manufacturing, located in virtually all ETDD counties, and Boat Manufacturing, located in Loudon, Knox and Monroe counties provide over 14,000 jobs collectively.

Furniture manufacturer England, Inc. will invest \$31 million to expand its operations in New Tazewell, TN. The expansion will create 202 jobs in Claiborne County. The furniture manufacturer is an independent division of La-Z-Boy Incorporated and has been located in New Tazewell since 1964²⁶.

BMT Manufacturing, a trailer company, plans for to expand their operations into Campbell County, investing a total of \$3.7 million and creating 148 new jobs²⁵.

Takahata will add 13,000 square feet to its existing facility in Scott County and introduce new equipment to meet growing demand. The plastic injection molding automotive manufacturer will invest \$9.7 million and create 81 new jobs in Scott County²⁴.

→ *Food Service, Restaurant Industry*: The restaurant industry accounts for 10% of the employment in the state and approximately \$12.2 billion in estimated sales in Tennessee. Approximately 4,000 eating/drinking establishments and over 80,000 East Tennesseans are employed in this industry²⁸. ETDD is the corporate headquarters to many large food service corporations, including Ruby Tuesdays, Sysco, The Copper Cellar, Aubrey's and Buddy's Barbeque.

→ *Hospitality and Tourism*: The Great Smoky Mountains, Dollywood, Ober Gatlinburg and numerous TVA lakes contribute to the profound effect this industry has on the economy of East Tennessee, employing over 550,000²².

Reference sources noted end of document

Summary

Workforce, Opportunity Zone, Jobs Tax Credit Enhancement Incentives and Headquarters

Workforce

Tennessee experienced an improvement in unemployment from 2017 (5.0%) to 2018 (3.8%)¹⁴. Job growth in Tennessee outpaced national employment growth of 0.6 percent per year, which represented an increase of 8.4 million workers¹¹. Tennessee is projected to see more job growth in both 2018 and 2019, 1.4 percent and 1.2 percent, respectively¹⁷.

The service-providing sector is expected to grow the most rapidly, at a compound annual growth rate of 1.5 percent, while the goods producing sector will grow about a third as fast at 0.6 percent¹¹. The most in-demand career fields include Administrative and Information Support, (deficiency 4,788 jobs without qualified applicants to fill) Production (deficiency 6,824 jobs), Selling and Sales Management (deficiency 3,917 jobs), and Restaurants and Food Services (deficiency 2, 712 jobs)¹².

Conversely, a number of career paths are oversupplied. These fields include Cosmetology, Engineering Technology, Journalism, and Recreation and Attractions²¹.

Opportunity Zone

The Opportunity Zone Program is a community development tool established by the U.S. Congress in the Tax Cuts and Jobs Act of 2017. This program is designed to drive long-term capital to low-income communities. The new law provides a federal tax incentive for investors to re-invest their capital gains into Opportunity Funds, dedicated to revitalization in designated low-income areas. Each state could nominate up to 25% of its low-income census tracts to the Secretary of the Treasury. The Secretary of the Treasury certifies the nominations and designated tract(s) as a qualified opportunity zone. The Tennessee Department of Economic and Community Development (TNECD) manages the program²³.

Within the ETDD service area, twelve counties were qualified with opportunity zone status. These counties and number of census tracks approved²³ include:

- Roane, Claiborne, Scott, Union : 1 each
- Anderson, Loudon, Monroe, Cocke, Blount, Hamblen, Sevier: 2 each
- Knox: 9

Job Tax Credit Enhancements

The Tennessee Job Tax Credit Enhancement program provides incentives for companies expanding or relocating to the state and committed to creating new full-time positions. Incentives are available for counties that have been Tier 2, Tier 3 and Tier 4, progressively deemed those with greater economic distresses. ETDD has the highest number of counties statewide (7) that have been classified at the enhancement Tier 4 level³¹. These incentives are available for companies that create or relocate their headquarters, are in the manufacturing industry, data centers, warehouse and distribution and call centers³⁰.

Major Companies Headquarters In ETDD^{27,32}

- Regal Entertainment Group- Knox County
- Ruby Tuesday- Maryville
- TeamHealth– Knox County
- Pilot Corp./Pilot Flying J - Knox County
- SSC Service Solutions– Knox County
- Janus Global Operations –Lenoir City
- Alcoa, Inc.– Alcoa
- MasterCraft and SeaRay- Vonore
- Clayton Homes, Inc.-Maryville
- Weigel’s - Knox County
- Scripps Networks Interactive, Inc.– Knox
- The H.T. Hackney Co.– Knox County

Reference sources noted end of document

 **TAKAHATA**



Summary

Tourism, Environmental, Geographic and Cultural Impacts

Tourism

For the 12th consecutive year, tourism topped \$1 billion in state and local sales tax revenue, reaching \$1.8 billion. This marks a 7.6% increase over 2016, higher than the national growth of travel related state tax revenues of 4.6%. Tourism also generated 184,300 jobs for Tennesseans, a 3.1% growth year over year. All 95 counties enjoyed an increase in tourism expenditures. Each county saw more than \$1 million in direct travel expenditures in the economic impact of tourism. Two of the five counties that exceeded \$1 billion in travel expenditures are located in the ETDD service area. The five counties are Davidson (\$6.505 billion), Shelby (\$3.503 billion), *ETDD Sevier* (\$2.276 billion), Hamilton (\$1.112 billion), and *ETDD Knox* (\$1.097 billion)²².

Opioid Use

The opioid crisis has swept across the nation with catastrophic consequences. Most discussions of this epidemic have appropriately focused on adverse health consequences including addiction, overdoses and mortality. However, one facet of the problem that has received relatively scant attention is the

potential consequences for the labor market. Tennessee has had ample experience in dealing with the opioid crisis. The state ranked third in the nation in 2016 for opioid prescriptions dispensed per capita. Tennessee ranks 15th with the highest rates of drug overdose deaths with the majority of those deaths related to opioids³⁴. A large share of individuals in Tennessee Department of Mental Health and Substance Abuse Services treatment facilities had opioid-related abuse problems with an estimated \$422.5 million spent on hospitalizations associated with opioid abuse³⁴. All opioid-related hospitalization costs have been estimated at \$442.6 million per year, and TennCare costs at \$76.9 million annually³³.

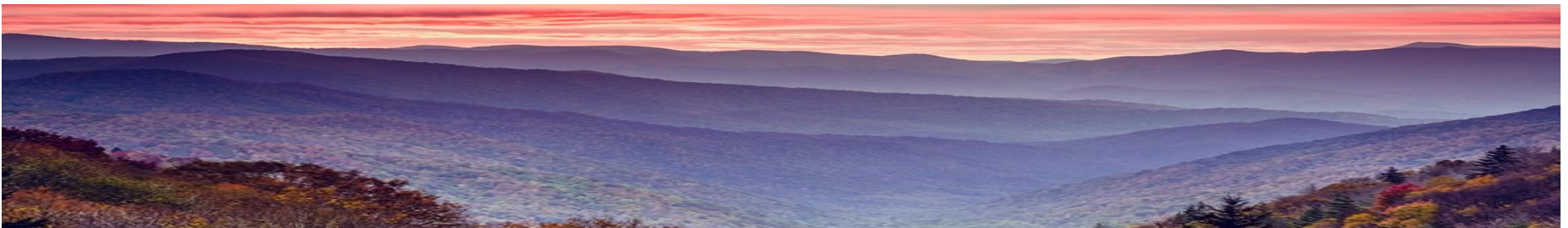
ETDD has several counties that are ranked in the nation's top 50 for opioids prescribed per capita using morphine mg equivalents in 2015. These counties included Campbell (3rd), Claiborne (7th), Cocke (20th), Anderson (34th) and Hamblen (44th)³⁴. Knox County ranks third in the state for opioid-related deaths. The opioid problem is worse in East Tennessee than anywhere else in the state. East Tennessee's locale is the reason behind these staggering numbers. It is part of the Appalachian region,

where socio-economic disparities put people more at risk for additions according to the National Institute on Drug Abuse. It also is situated on the I-40/I-75 corridor, putting it at the end of the drug pipeline that begins in Michigan³⁴.

It is possible to show that higher per capita opioid prescription rates lead to higher county unemployment rates, lower rates of labor force participation and diminished employment to-population ratios. Having 1% of the workforce out correlates to \$1.29 billion in lost income³⁴. A back of the envelope calculation indicates that a 10% reduction in per capita opioid prescriptions would lead to an additional \$825 million in income for Tennesseans from enhanced labor market participation³³.

Eliminating opioids entirely is not a realistic option. The question is how to find the right balance for a drug that produces benefits for some but high costs for others³³. "Those addicted to opioids need treatment so they can return to the wholeness of life, including the workforce", Dr. Matt Harris, UT Knoxville, Assistant Professor of Economics³⁴.

Reference sources noted end of document



SWOT Analysis

Strengths, Weaknesses, Opportunity and Threats

The ETDD SWOT analysis has been developed by the CED Advisory Board to identify the regional strategic plan, goals, objectives and performance measures for the upcoming three years. The following presents the summary received for each of the SWOT categories:

- **Strengths (S):** Assets and advantages
- **Weaknesses (W):** Challenges, disadvantages and shortcomings
- **Opportunities (O):** Possibilities for improvements and progress
- **Threats (T):** Internal and external factors the could compromise or contribute to regional decline



SWOT Analysis

Highlighted Strengths

Low Cost of Living/Affordability: Based on second quarter 2018 averages, Tennessee has the 6th lowest cost of living in the nation at approximately 10% below the national average. The state has no tax on income, although there are taxes on investments and dividends. Tennessee state tax rate is 7% when supplemented by local rates that can be as high as 2.75%. On average, the total rate paid by Tennessee residents is 9.46%. The sales tax rate for food and food ingredients is 5%³⁷. There are no taxes on prescription drugs or retirement income. Across the 16 ETDD counties, the average home price is \$126,216³⁶. Fifteen of the 16 ETDD counties have a cost of living rate lower than the national average³⁶.

Business -friendly environment with Education aligned to producing Skilled workers



- No personal income tax on wages and salaries
- A right-to-work state and Successful overhaul of our tort and workers compensation laws
- Lowest state debt per capita in the country—The Tax Foundation
- Second lowest in the U.S. for state and local tax taxes paid per capita—The Tax Foundation
- Triple ‘A’ rate by all major rating services³⁸
- Seven of the 16 ETDD counties have Tier 4 Tax Credit Enhancements for a new or expanding companies
- For 2013 and 2015, Tennessee was ranked as the No. 1 state in the United States for new jobs from Foreign Direct Investment (“FDI“), according to IBM’s Global Location Trends report. In 2017, FDI accounted for nearly one-third of all Tennessee’s new jobs and 56% of all capital investment committed in the state⁴⁴.

Tennessee continues as the No. 1 state for job growth among small businesses, according to data collected by the nation's biggest payroll provider, Paychex. Tennessee's average wage rate of \$22.71 last month was up 3.61% in the past year, the third biggest gain among the 50 states behind Arizona and California³⁸. A skilled worker is any worker who has specialized knowledge and acquired abilities who can be immediately placed in employment situations with little, to no, additional skills training. The number of post-secondary completions has increased by 14.5% during the same period. The percentage of Tennesseans, age 25-64, with an Associate’s Degree or higher increased from 29.9% to 35.7% from 2006-2016. This 5.8 percentage points ranks Tennessee #5 in the nation. In addition, the number of Tennesseans with a Bachelor’s Degree or higher increased by 5.1% over this same period³⁸. Tennessee Promise and Tennessee Reconnect are pioneering programs being recognized nationwide as a proven strategy to impact workforce development.



Transportation: Home to the 2nd busiest cargo airport in the world, 3rd largest rail center in the US, the nation’s 5th largest inland port, and 1st in the southeast for trucking, courier and messengers sector employment, Tennessee is conveniently accessible within a day’s drive to a majority of US markets. The Tennessee River provides southern access to the Tennessee-Tombigbee waterway and western access to the Mississippi River, both of which provide access to the waterways of the world. The transportation network within ETDD has three major interstates (I-40, I-75, I-80). McGhee-Tyson Airport, located in Blount County, is the premier air facility in East Tennessee. Daily, the airport handles commercial airline, air cargo, military aviation and general aviation air traffic. With parallel 9,000 feet runways, McGhee Tyson Airport can accommodate any size aircraft in today’s inventory. Located 12 miles south of downtown Knoxville, the airport occupies more than 2,000 acres of land with space for additional air cargo facilities or economic development. McGhee Tyson Airport has five major airlines serving 21 non-stop destinations The Tennessee Air National Guard’s 134th Air Refueling Group operates out of McGhee Tyson Airport.

Reference sources noted end of document

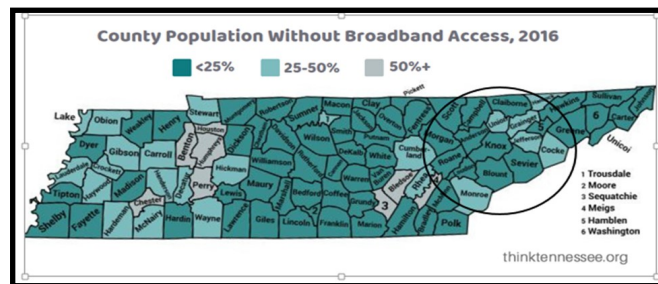
SWOT Analysis

Highlighted Weaknesses

Rural Services: “Many of the state’s rural areas are not sharing in the success of their urban counterparts. Based on rankings of unemployment rate, per capita market income and poverty rate, 17 of Tennessee’s counties, all in rural areas, are in the bottom 10% of the nation with an additional 35 counties ranking in the bottom 25%. When the Governor’s Rural Task Force began its work, the numbers were even higher with 21 counties in the bottom 10% of the nation. With more than half of our counties in the bottom quarter of the country in economic indicators, our rural areas struggle with building capacity for key functions and developing their local assets to create thriving communities”⁴⁰. From community infrastructure capacities, recruitment of highly qualified teachers, healthcare services, business/corporation recruitment and workforce skills development, the rural communities are vastly in need of support.

Eleven of the 16 ETDD counties are defined as Rural. Nine ETDD service counties have been identified by the Tennessee Housing Development Agency as Targeted Areas of chronic economic distress and have allowances to promote homeownership in these areas⁴¹. Seven ETDD counties have been identified as a Federal Health Professional Shortage Area for mental health services, with the remaining nine ETDD counties identified as lacking mental health services countywide for the low income residents⁴². Fourteen ETDD counties have been identified Federal Health Professional Shortage Areas for primary care countywide for the low income residents, with the remaining two counties (Cocke and Union) lacking primary care services for all residents⁴³.

Health Status: Tennessee has the 15th highest adult obesity rate in the nation⁴⁷ with consistent distribution of the percentages of adults within the rural, suburban and urban area being obese. African Americans present with a much higher prevalence of obesity than their white or Latino counterparts. Yet, the more alarming trend is the fact that Tennessee children are now the heaviest kids in the nation. Thirty-eight percent of Tennessee kids are either overweight or obese. The new rating is a distressing milestone in Tennessee’s obesity crisis, which threatens the long-term health of the state⁴⁶. Preventable chronic diseases directly related to obesity are cumulative and present added issues of healthcare costs and needs, as well as lost productivity. The rural, urban and suburban geographic regions of the state have similar percentage rate of obesity, yet the significant concern for treatment of the associated chronic diseases caused and correlated from obesity is for the rural population. These areas experience the most significant medical professional shortages and have some of the highest rates of uninsured. Several of ETDD’s most rural counties with whole county, as well as access to care for the low income, also have the highest rates of negative health factors. The Tennessee Department of Health rates Scott, Cocke, Campbell, Union, Morgan, Monroe and Claiborne counties with the highest negative health factors.



Broadband Access: ThinkTennessee and the Center of Rural Strategies’ report states that “roughly a quarter of Tennessee’s rural families are without any kind of broadband access, while 23% of the total population reports that they lack a high-speed internet subscription”. One in four rural families live in areas without access to broadband. The East Tennessee Development District service region has the highest number of counties statewide that fall into the data category reflecting up to 50% of the population lacks access to broadband service. These ETDD counties include Grainger, Union, Jefferson, Cocke and Monroe. Though progress is being made by the Tennessee Broadband Accessibility Act, the brief finds that thousands of Tennesseans, especially those in rural areas, do not have access to broadband internet. Further impacts include, many who live in these areas where the service is provided,

cannot afford it. Even where broadband is available, a quarter of all households and nearly half (49.6%) of the poorest Tennesseans (<\$20,000 annual income) do not have a broadband subscription. The cost of subscription is a key barrier for low-income Tennesseans, as 81% of those with incomes below \$30,000/year cite affordability as a main concern in adopting internet service. This fiscal fact could have significant impacts for the residents in the 9 of the 16 ETDD counties of as the median household income reported by the Census Bureau has historically been in the \$30,000 range with poverty levels, above the state average, ranging from 15%-25% in 11 of the 16 ETDD counties³⁹. A direct correlation to the economy of a community is the impact to the lack of broadband on current and future business productivity, lack of job creations, lost income and increased unemployment gaps³⁹.

Reference sources noted end of document

SWOT Analysis

Highlighted Opportunity

Rural Initiatives:

In alignment with the statewide mission of the Rural Taskforce⁴⁰, ETDD has the ability to collaborate with our rural counties to create opportunities that build stronger infrastructures to improve economic and workforce development, digital infrastructure, entrepreneurial opportunities and asset-based economic activities. Improvement in these above areas will also have beneficial efforts on the local education systems, teacher recruitment and school capital funds. Supporting rural healthcare development initiatives that targets community-based health resources has significant opportunities to grow, especially in our shortage and distressed counties. The crisis of shortage of primary care and mental health care in the rural communities has the opportunity and priority need to align impactful capacity alliances to resolve.

Employment Growth- Business Recruitment and Expansion:

Tourism, Recreation and Natural Resources: Winters are mild with the average temperature of 40 degrees. Summer months are a prime time for outdoor recreation, with an average temperature of 83 degrees. Contained within the ETDD region are many world-class recreation facilities and destinations including the Great Smoky Mountains National Park, the Cherokee National Forest, Dollywood, and six TVA lakes. These facilities attract well over 11 million visitors per year. Tourism agencies in Sevier County reported earlier this year that their marketing budgets, while experiencing regular growth, were back in a “normal” range after a yearlong surge of spending intended to convince travelers their favorite attractions survived the 2016 wildfire⁴⁸. Every county in the state saw more than \$1 million in direct tourism impact, but only five counties topped \$1 billion with Sevier at \$2.3 billion followed by Knox at \$1.1 billion⁴⁸. “Tourism pays the bills, but also strains roads, police and wastewater infrastructure” (Leon Downey, ED of Tourism Dept.). East Tennessee has many opportunities to continue to prosper and expand the tourism industry.

Reference sources noted end of document

Employment Growth- Business Recruitment and Expansion:

East Tennessee is home to many vital workforce clusters and employment opportunities. The Auto industry suppliers, boating manufacturers, data centers, customers service centers, distribution and logistics, film/television industry, aeronautical, tourism, national research and manufacturing all continue to be positioned for positive growth.

Broadband:

The think tank and officials with the Center for Rural Strategies also think policies like the “dig once” approach can help expand broadband connections while reducing the cost for the infrastructure. The strategy calls for utilities to coordinate road construction and other infrastructure improvements with broadband installation³⁸.

Healthy Initiatives:

In alignment with the Healthier Tennessee⁴⁹ movement, many ETDD’s service counties have already been recognized as Healthier Tennessee Communities. This recognition, to prioritize preventable health efforts, has been awarded to Blount, Anderson, Hamblen, Roane, Sevier and Loudon counties⁵⁰. There are many opportunities for ETDD counties to be recognized for supporting their communities, workplaces, campuses and residents to participate in more healthy lifestyle choices.



SWOT Analysis

Highlighted Threats

Fifty percent of ETDD counties are **Designated 'Distressed' or 'At-Risk' Counties** in Tennessee by the Appalachian Regional Commission (ARC). Fiscal Year (FY) 2018 reports four of the ten ARC Designated Distressed Counties in Tennessee are located in the ETDD service area. These counties included Campbell, Cocke, Morgan and Scott. FY 2019 has ARC designating Campbell County improving from 'Distressed' classification to 'At-Risk' status. Five of the fifteen 'At-Risk' counties in the Tennessee ARC areas are located in the ETDD service area. These counties include: Campbell, Claiborne, Grainger, Monroe and Union. Distressed counties are the most economically depressed counties. These identified counties rank in the worst 10% of the nation's counties. At-Risk counties are those at risk of becoming economically distressed. These identified counties rank between the worst 10% and 25% of the nation's counties.

Tennessee **wages still averaged nearly 12% less** than the U.S. average wage rate of \$25.76³⁸.



Having the financial means to **afford broadband services** is directly linked to a positive employment situation, as employed Tennesseans are more likely to have the means to have a broadband internet subscription than those who are unemployed. Ironically, online job searches decrease the time of unemployment by 25%. Cocke County is one of the most negatively impacted counties with limited or no broadband access and has one of the highest unemployment rates (6.5%).

Population migration

Population increases are anemic at best in most of ETDD's rural counties. Five counties had a **negative growth rate** the last three year comparison. The lack of employment opportunities is a major reason for the outmigration of people, especially young people. A lack of jobs and a lack of well-paying jobs causes skilled workers to migrate to wherever good jobs are to be found. This is a particular problem in rural areas as young people leave to acquire training/education and simply never return to their home county to establish residency.

Aging Population

Tennessee Commission on Aging and Disability (TCAD) conducted a statewide survey of both older adults and their providers. Currently, the two main challenges to meeting the **needs of the ever-increasing aging population** are financial constraints and lack of program capacity to meet current and future demand. The long-term challenge will be the ability to keep up with the increasing demand for programs and services with stagnant or decreasing resources⁵¹. This strain on the ability to provide adequate resources will be most felt in the rural communities where services are already limited or non-existent.

Sevier (37%), Blount (35%), Union (35%), Jefferson (33%), Grainger (30%), Knox (31%), and Loudon (30%) are expected to have the highest percentage growth in the number of individuals ages 65+ between 2015 and 2030⁵².



Reference sources noted end of document

Strategic Direction

Action/Implementation Plan

ETDD Vision statement

The East Tennessee Development District will utilize its staff and resources to actively support the economic and community development efforts of local jurisdictions in order to foster job creation, new investment and improve the overall quality of life in the region.

The below Goals and Objectives will be achieved by the collaborative efforts working with the respective counties and municipalities' leadership and staff, business and corporations, community residents and stakeholders, as well as engaged state or federal officials.

Goals and Objectives

Goal 1: Maintain and improve the region's competitive advantages by investing in the improvement of existing industrial parks and encourage the development of new, high quality industrial and business parks

- Objective A: Create high skill, high wage jobs for the emerging labor force
- Objective B: Raise per capita income levels in rural areas by providing access to high wage manufacturing jobs
- Objective C : Limit out-migration by providing a pool of local jobs
- Objective D: Provide adequate new industrial property for the expansion of existing clusters within the automotive, boating building and technology industries
- Objective E: Increase the manufacturing output of the region
- Objective F: Tie industrial recruitment and marketing efforts to target industries identified by strategic plans authored by the State of Tennessee, TVA, ETEDA and the Innovation Valley
- Objective G: Promote new Foreign Trade Zone subzone opportunities in all 16 counties
- Objective H: Support the development of cross county boundary sites that can accommodate the location of large production facilities, i.e., automotive manufacturing plants
- Objective I: Improve rail service facilities and freight terminal facilities within the region

Goal 2: Invest in the installation of basic infrastructure in order to improve the overall quality of life in the region and protect and conserve the region's water resources

- Objective A: Extend adequate wastewater collection services to areas that are unserved or under-served and are under heavy development pressure
- Objective B: Improve local wastewater treatment capacity in order support the expansion of existing industry or the location of new industry
- Objective C: Protect water quality by reducing sources of non-point pollution
- Objective D: Extend public water service to unserved areas in order to provide a safe and reliable source of potable water to area residents
- Objective E: Develop strategies for consolidation of existing utility providers in order to maximize economies of scale and coordination of services

Goal 3: Provide broadband access to all areas of the region

- Objective A: Work closely with the State of Tennessee and TVA to prepare high speed broadband development plans for all counties in the District
- Objective B: Work closely with local governments' utilities and private sector to acquire funding for the installation of high speed telecommunications infrastructure

Strategic Direction

Action/Implementation Plan

Goal 4: Improve the region's workforce development institutions and programs

- Objective A: Enhance distance learning capabilities throughout the region
- Objective B: Provide in-county access to Career Center programs and services
- Objective C: Support and participate in programs that establish a synergy between companies, technology centers and community colleges to address emerging needs for job training skills and continuing education
- Objective D: Establish a community college satellite campus in every ETDD county
- Objective E: Actively support a regional leadership program for the rural counties in the ETDD region
- Objective F: Support and participate in programs that initiate workforce development housing that is available and affordable.
- Objective G: Promote high school career academy pipelines to support the need for skilled labor pools and workforce development
- Objective H: Promote innovative training programs to support re-entry to workforce for rehabilitated, incarcerated and/or released individuals

Goal 5: Support small business development and entrepreneurial business development

- Objective A: Provide financing for the development and expansion of small businesses
- Objective B: Develop sources of micro-loan financing for start-up business, especially those of minority and women entrepreneurs

Goal 6: Focus on technology driven economic development opportunities

- Objective A: Support commercialization of emerging technologies that are developed at the Oak Ridge National Laboratory and the University of Tennessee
- Objective B: Provide support to small businesses that are capable of fulfilling procurement opportunities for the new Uranium Processing Facility (UPF) in Oak Ridge
- Objective C: Continue to develop and expand incubator space within each county
- Objective D: Focus on business development within "green" technology areas
- Objective E: Plan for the next phase of technology driven skills within the skilled labor force. (i.e. Robotics, Logistics)

Goal 7: Promote economic resilience and enhance the region's capability to quickly recover from economic downturns and natural or man-made disasters

- Objective A: Identify opportunities for interconnection of public utilities in order to provide redundant sources of public services
- Objective B: Diversify the economic base by supporting the creation of locally owned small businesses
- Objective C: Support pre-disaster planning and preparedness efforts at the local level such as program funding for local governments to have equipment that interacts with the States communication and radio system.
- Objective D: Promote development regulations that limit development in flood prone and sinkhole prone areas
- Objective E: Develop plans to quickly respond to major economic contraction events
- Objective F: Decrease reliance on the power grid by promoting energy efficiency programs in the residential sector
- Objective G: Develop strategies to construct low and moderate income housing opportunities to serve support workers in the local economy

Evaluation Framework

Performance Measures

For the three year time period from October 1, 2018 to September 30, 2021 that is covered by the updated CEDS, the following performance measurements will be used to evaluate the implementation of the strategy within the East Tennessee Development District:

1. **Job creation:** It is expected that the implementation of the CEDS will result in the creation of 750 new, state average wage level jobs within the region on an annual basis.
2. **Job retention:** It is expected that the implementation of the CEDS will result in the retention of 500 existing jobs within the region on an annual basis.
3. **EDA investments:** It is expected that the implementation of the CEDS will result in three new EDA investments that relate specifically to the strategic objectives developed for the ETDD region. Each EDA investment is estimated to be in the \$600K range and will be matched by local investments of \$600K per project.
4. **Private investment:** It is expected that the implementation of the CEDS will result in the location or expansion of seven (7) industrial companies in the region. Total private investment is expected to be in the range of \$100 million to \$120 million on an annual basis.
5. **Small business development:** It is expected that the implementation of the CEDS will result in the approval of twelve (6) new loans for small businesses in the region. Total loan investment will be in the range of \$200,000 per project and private investment will be in the range of \$250,000 per project.
6. **Change in the economic environment:** It is expected that the implementation of the CEDS will assist the region to achieve parity with the State of Tennessee and the nation as a whole in terms of per capita income levels. Performance will be measured by an annual assessment of the gap between individual county levels and state/national averages. It is expected that individual county levels will improve when compared to state/national averages each year.
7. In conjunction with the State of Tennessee, provide action-oriented, short-terms and long-term goals for economic development for two counties in the region.

Economic Resilience

“Steady State Initiatives” Action Plan

The action plan for ETDD to support bolstering the long-term economic durability of the region includes the following components:

- Work closely with counties, cities, chambers of commerce, industrial development boards, tourism organizations and other economic development entities to implement the goals and objectives established within the current CEDS document. Collaborate with the State of Tennessee, TVA, ETEDA, Innovation Valley and local economic development groups to actively recruit new investment within target industry groups such as automotive manufacturing, boat manufacturing, distribution centers, call centers, carbon fiber industries, media production industries and tourism
- Create new small businesses by providing staff assistance to the Areawide Development Corporation (ADC) for loan packaging and servicing of SBA 504 Program loans. Administer ADC's Revolving Loan Fund (Rural Development Intermediary Relending Program) and ETDD's EDA Loan Fund to stimulate small business development and expansion throughout the region. Continue to administer funding from the Tennessee Department of the Treasury that capitalized a loan program that primarily benefits minority and women owned business enterprises
- Assist local governments with acquiring grant/loan funding for the expansion or improvement of public water/wastewater infrastructure. Provide grant application and grant administration assistance to communities wishing to apply for funding through the Economic Development Administration, the Environmental Protection Agency, the State of Tennessee CDBG Industrial Grant/Loan Funds or the Tennessee FastTrack Infrastructure Development Program. Assistance provided by the District will include project design and review, prospect consultation, application packaging, project liaison functions, and project administration
- Enhance the asset base to create collaboration in the county with government, school, health, tourism, economic development leaders by identifying the assets in the county, prioritized needs and develop plans to improve those assets
- Participate with an education and workforce development coalition to administer an America's Promise Job Driven grant program. The coalition would include Pellissippi State, Chattanooga State, Cleveland State, Roane State, Walters State, Northeast State community colleges and the East Tennessee, First Tennessee and Southeast Tennessee development districts
- Cooperate with Appalachian Voices to begin implementation of a “pay as you save” market based residential energy efficiency program. Program would be based on electric cooperatives providing low cost loan funds to residential homeowners to purchase energy efficiency improvements. Amortization of the loan would be accomplished by applying the savings from the energy efficiency improvements to re-pay the utility
- Utilize ARC funding to prepare a high speed broadband infrastructure development plan for Campbell County.
- Promote sustainable development practices at the local and regional level
- Utilize data provide by Retail Strategies to provide assistance in the recruitment of commercial establishments into at least five counties
- Monitor and implement the Comprehensive Economic Development Strategy (CEDS) for the ETDD region on an annual basis through 2020
- Join the collective efforts to impact the opioid crisis in East Tennessee and the nation

Economic Resilience

“Responsive” Initiatives

The East Tennessee Development District serves as a network among various stakeholders in the region to support active and regular communications between the public, private, education and non-profit sections during economic challenges and post-disruption stages. Supports that have been identified to assist with continuing to enhance the ability for ETDD and regions response to any, anticipated or unanticipated, negative impacts include:

- Focus on the issue of economic resilience and acquire funding for a prototype recovery plan for one rural county in the District
- Assist one local government with the acquisition of pre-disaster grant funds from the US EPA
- Provide professional local planning services to up to 33 local planning commissions in the region
- Educate local planning commissioners on the National Flood Insurance Program and the impact of development within flood zones and sinkhole prone areas



Data Tables

Overview

County	Economy ³⁶ Job Growth	Cost of Living ³⁶ Compared to National Average	Real Estate ³⁶ Home Appreciation in last 10 years	Home Costs ³⁶ Median	Transportation ³⁶ Average Commute Time National 26mins
Anderson	(+) 1.5%	6.60% lower	12.27%	\$136,000	23mins
Blount	(+) 1.44%	.30% lower	6.92%	\$176,000	24mins
Campbell	(+) 1.39%	13.50% lower	6.73%	\$96,800	25mins
Claiborne	(+) 1.07%	16.10% lower	7.85%	\$98,000	25mins
Cocke	(+) .23%	16.80% lower	21.57%	\$87,500	27mins
Grainger	(+) 1.11%	8.00% lower	15.05%	\$114,700	33mins
Hamblen	(+) 1.38%	9.60% lower	7.70%	\$121,000	21mins
Jefferson	(+) 1.36%	5.70% lower	5.32%	\$135,000	26mins
Knox	(+) 1.55%	2.50% lower	7.22%	\$170,500	21mins
Loudon	(+) 1.26%	3.20% higher	10.55%	\$191,000	25mins
Monroe	(+) .93%	12.20% lower	12.94%	\$117,200	27mins
Morgan	(+) 1.49%	14.20% lower	9.81%	\$83,100	31mins
Roane	(+) 1.52%	7.4% lower	4.15%	\$127,000	27mins
Scott	(-) .14%	18.70% lower	8.14%	\$70,767	29mins
Sevier	(+) 2.93%	3.30% lower	7.08%	\$174,000	25mins
Union	(+) 1.23%	6.90% lower	12.59%	\$120,900	34mins

Green: Higher, Positive or Most Beneficial
Orange: Lower, Negative or Most Concerning

Data Tables

Overview

County	Population ¹ Growth since 2010	Percentage Poverty ¹ State Average 15%	County Economic Status ³⁵ 2019	Percentage Unemployed ²¹ Jan. 2018	Unemployment Rate change ²¹ Jan 2017- Jan 2018	Education ¹ High School or higher State Average 86%	Median Household Income ¹ 2012-2016
Anderson	(+) 1.5%	14%	Transitional	3.9%	(-) 1.1	86%	\$44,241
Blount	(+) 5.5%	11%	Transitional	3.7%	(-) 1.2	88%	\$49,532
Campbell	(-) 2.6%	24%	At-Risk	5.1%	(-) 2.3	74%	\$33,628
Claiborne	(-) 1.9%	25%	At-Risk	4.7%	(-) 2.1	77%	\$33,428
Cocke	(-) .2%	24%	Distressed	6.5%	(-) 2.1	79%	\$31,081
Grainger	(+) 2.2%	20%	At-Risk	4.5%	(-) 1.3	80%	\$37,522
Hamblen	(+) 2.8%	19%	Transitional	4.3%	(-) 2.7	82%	\$39,270
Jefferson	(+) 4.2%	16%	Transitional	4.5%	(-) 1.3	84%	\$43,673
Knox	(+) 6.8%	15%	Transitional	3.1%	(-) 1.0	91%	\$50,366
Loudon	(+) 7.4%	10%	Transitional	3.7%	(-) 1.2	85%	\$52,995
Monroe	(-) 1.6%	19%	At-Risk	4.0%	(-) 1.5	80%	\$37,054
Morgan	(+) 3.9%	22%	Distressed	5.2%	(-) 1.9	79%	\$39,728
Roane	(-)2.1%	14%	Transitional	4.5%	(-) 1.7	85%	\$42,299
Scott	(-) 1.1%	22%	Distressed	4.8%	(-) 3.3	77%	\$30,897
Sevier	(+) 8.8%	15%	Transitional	6.1%	(-) 2.2	84%	\$42,586
Union	(+) 1.7%	22%	At-Risk	4.4%	(-) 1.8	77%	\$38,540

Green: Higher, Positive or Most Beneficial
Orange: Lower, Negative or Most Concerning

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