

A REGION CONNECTED

nashville area chamber of commerce annual report

2014-2015



Nashville Chamber board leadership - Wayne Smith, chairman and CEO, Community Health Systems, Inc. (immediate past chair); Ralph Schulz, CEO, Nashville Area Chamber of Commerce (president); Kent Adams, president and CEO, Caterpillar Financial Services Corporation (chair); Michael Shmerling, chairman, XMI Holdings, Inc. (vice chair)

The Chamber's purpose is to facilitate community leadership to create economic prosperity, and everything we do is tied to that purpose. As Middle Tennessee enjoys unprecedented success, we'll maintain our focus on the things that keep our region moving forward.

In the year ahead, we will concentrate on our four core initiatives: increasing growth opportunities, advancing education, creating jobs and sustaining a business-friendly market. Our top priorities are education, workforce, transit, advocacy, small business resources and our new Partnership 2020 economic development strategy.

As a Chamber member, you are contributing to the growth of one of the most vibrant business climates in the nation. We are proud to create opportunities for you to belong, engage, lead and prosper.

Thank you for your support.

Ralph Schulz

Ralph Schulz
President and CEO, Nashville Area Chamber of Commerce



The purpose of the Nashville Area Chamber of Commerce is to facilitate community leadership to create economic prosperity.

Brand promise: Nashville is a thriving city filled with risk-takers. Positive energy and camaraderie fuel the spirit of the region. Every day, people find new ways to take advantage of opportunities offered, to make something from nothing, to make their mark, to realize their dreams. At the center of this spirit is the Nashville Area Chamber of Commerce.

AT THE CHAMBER, YOU:

BELONG

Collaborate with others, energized by common drive and passion;

ENGAGE

Share a vision for the future and the collective influence to make it happen;

LEAD

Impact our region and transform our future;

PROSPER

Realize opportunities that grow your business and enrich our communities.

In the words of author Joseph Campbell, “If you’re going to have a story, have a big story, or none at all.” The story of Nashville is big, and getting bigger every day. Our housing market, tourism industry and job growth are experiencing record highs. Our construction boom shows no sign of slowing, with more than \$2.4 billion in building permits issued last year. We have a new ballpark and amphitheater that are true community assets, and our growth is reflected in our skyline – and our bottom line. Nashville is a city on the move.

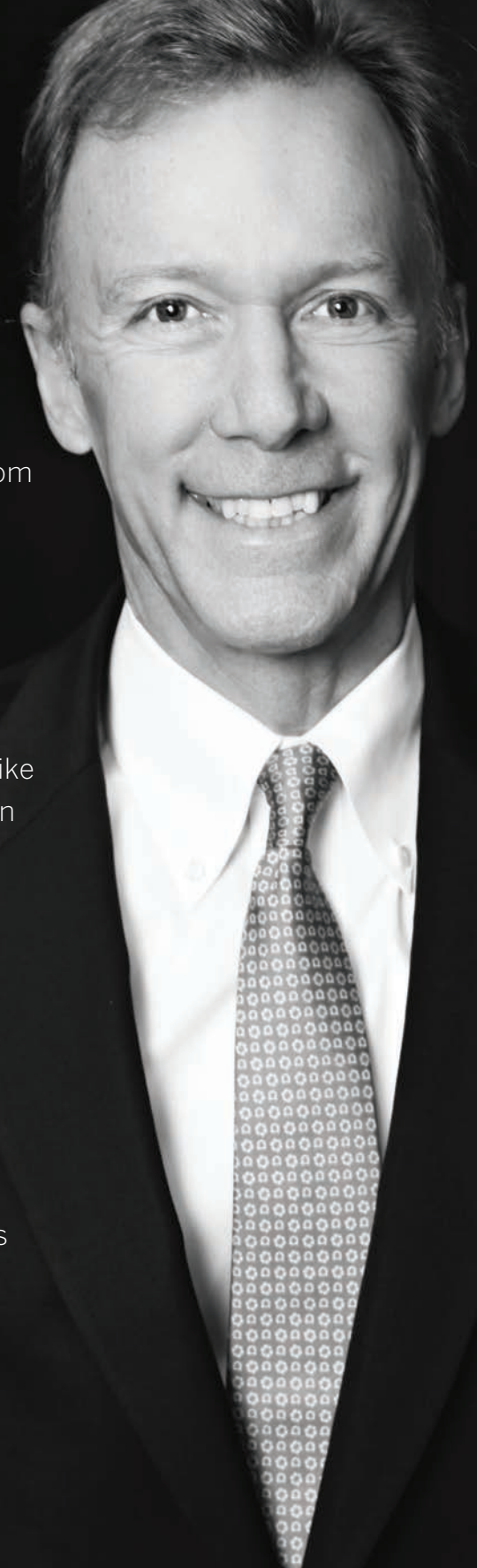
From thriving business ventures to chart-topping records, the “next big thing” is being created every day in Middle Tennessee. Leaders like you are helping maintain the momentum that’s propelling our region to new heights.

Nashville’s success story continues to be written, and we’re glad you’re part of it.



Kent Adams

Chairman, Nashville Area Chamber of Commerce board of directors
President and CEO, Caterpillar Financial Services Corporation



thank you to our 2014-2015 sponsors

The Nashville Area Chamber is grateful to our sponsors for their ongoing support, which allows us to offer programs and events that help our members grow and prosper.

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fiscal year highlights

We facilitate community leadership to create economic prosperity.

JUL 2014 NASHVILLE EMERGING LEADER AWARDS

YP Nashville honored 75 of Nashville’s top young professionals at the eighth annual Nashville Emerging Leader Awards at Lipscomb University.

AUG 2014 PICK YOUR PLACE

Chamber members attended this annual event to learn how to maximize their Chamber investment.

SEPT 2014 BUSINESS AFTER HOURS

The Chamber hosted the first of three Business After Hours events for the year at The Inn at Opryland and attracted more than 200 registrations.

OCT 2014 NASHVILLE REGION'S VITAL SIGNS

Using in-depth analysis, the Chamber published this second annual study that identifies progress and forecasts emerging issues and challenges – while we still have time to develop regional solutions.

ANNUAL MEETING

Chamber members and Partnership 2020 investors gathered to hear Jon Meacham discuss Nashville becoming “The South’s Red-Hot Town.”

NOV 2014 NEXT AWARDS

In partnership with the Nashville Entrepreneur Center, the Chamber celebrated the region’s entrepreneurial spirit, recognizing the growth in our economy.

DEC 2014 EDUCATION REPORT CARD

This 23rd annual progress report evaluates Metro Nashville’s public school system through the lens of academic performance data.

RED-HOT RALLY

The Chamber held a new member campaign involving more than 100 volunteers who brought in 172 new members over the course of two days, making this the largest month for membership in the fiscal year.

JAN 2015 BUSINESS STUDIO

Business Studio is designed for small business owners to build their business, connect with peers and customers and discover new ideas and inspiration to grow and thrive.

FEB 2015 INTERNATIONAL BUSINESS COUNCIL LUNCHEON

This event featured a panel discussion on the proposed Transatlantic Trade and Investment Partnership between the United States and the European Union.

MAR 2015 BIZAROO™

The Chamber hosted its first-ever mini-conference for small and mid-sized business professionals providing content and speakers to help grow their company.

APR 2015 LEADERSHIP/ TRANSIT STUDY MISSIONS

A record-setting local and regional delegation visited Salt Lake City to study community development best practices from Utah leaders.

MAY 2015 ACADEMIES OF NASHVILLE AWARDS

For the fifth year, the Chamber hosted a celebration of outstanding teachers, principals and business partnerships in the Academies of Nashville.

JUN 2015 MAYORAL CANDIDATE CONVERSATION

Attendees at this forum gained a deeper understanding of candidate goals for the Nashville region, based on unique data from the Chamber’s Research Center.

membership & marketing

With more than 2,200 member companies, the Chamber is Middle Tennessee's largest business federation.

MEMBERSHIP

We welcomed 522 new members this past year, the largest new member growth in more than a decade. Our members represent more than 100 industry categories, from sole proprietorships to large corporations.

MARKETING

The Association of Chamber of Commerce Executives, North America's largest trade association for chambers, recognized the Chamber's "WE" marketing campaign and the 2014 Datascope research publication for excellence awards. The "WE" campaign won the Grand Award for campaigns in the large market category, and Datascope received the Award of Excellence for publications.

AREA ADVISORY COUNCILS

CHAMBER NORTH hosted business and community leaders at quarterly meetings focusing on North Nashville's boom of activity. North Nashville leaders toured Pearl-Cohn's business academies, met Metro Council candidates and got an early glance at First Tennessee Park.

CHAMBER MIDTOWN gave midtown business leaders an opportunity to connect with candidates on the state and metro level. Chamber Midtown also hosted a panel to discuss the future of transit and development in the area.

CHAMBER SOUTH highlighted South Nashville's momentum at an economic development lunch with Mayor Karl Dean. Oldacre MacDonald, Ford Ice Center and Community Health Systems presented new projects to commercial brokers and developers.

CHAMBER WEST met monthly to connect West Nashville business and community leaders with opportunities to engage with public education, elected officials and business neighbors in Green Hills and Belle Meade.



CHAMBER EAST is working to make it easier to find business districts within East Nashville. Through a multi-year wayfinding and place-making initiative, business and community leaders are naming business districts, such as The Corners of Lockeland, featuring small businesses in the 17th Street and Fatherland area.

The branding project includes a new East Nashville logo, which was selected from several submissions by a community vote.

The logo is featured on bumper stickers, T-shirts and the first of many new murals found at the corner of Sixth and Main streets.

The mural project is gaining steam as a multiphase, collaborative project connecting building owners, businesses, artists and consumers. The next phase in the project will include a mural tour and map, inviting residents and visitors to explore all of East Nashville.

photo credit: Susan Moore, 2015



441

ATTENDEES

YP NASHVILLE
CONNECT

257

ATTENDEES

EDUCATION
REPORT CARD

118

DELEGATES

LEADERSHIP/
TRANSIT STUDY
MISSIONS

519

ATTENDEES

BUSINESS AFTER
HOURS SERIES

497

ATTENDEES

NEXT
AWARDS

376

ATTENDEES

MAYORAL CANDIDATE
CONVERSATION

7,696

ATTENDEES

100+ EVENTS

programs & events

Programs and events are an integral component of Chamber membership. Members benefit from more than 100 face-to-face networking, educational and celebratory events throughout the year.



small business initiatives

Small businesses are the foundation of Nashville's economy and the backbone of Chamber membership.

Approximately 75 percent of Chamber-member businesses have 50 employees or fewer. The Chamber launched Business Studio, a new suite of resources for these small and midsize businesses, in September 2014. We developed Business Studio after conducting a series of focus groups and surveys of local entrepreneurs to identify areas of need.

Since its launch, Business Studio has provided more than 20 educational workshops; a half-day, multi-speaker conference, called BIZaroo™; and the Nashville Small Business Forum, hosted in partnership with Metro government. These programs have attracted a collective attendance of more than 1,000, reaching approximately 750 unique individual small business owners.

In an effort to expand its reach, Business Studio has partnered with local organizations such as the Nashville Entrepreneur Center, Pathway Women's Business Center and the Center for Nonprofit Management, among others. Business Studio will continue to evolve by offering new and unique programming tailored to meet the changing needs of small and midsize businesses throughout our region.

In November 2014, the Nashville Area Chamber of Commerce and the Nashville Entrepreneur Center partnered to host the annual NEXT Awards, an event that spotlights the companies and individuals whose drive and entrepreneurial spirit are making a significant impact on our region's economy.

03/15
1 Small business owners filled the room for the BIZaroo™ conference held in March. Designed as a half-day conference for small and midsize business owners, nonprofits and entrepreneurs, BIZaroo™ featured speakers from more than 15 Chamber-member businesses.

1/14
2 Refinery Nashville hosted a packed house to celebrate the official launch of Business Studio in January.

03/15
3 The Chamber's inaugural small business conference, BIZaroo™, was captured by Heidi Schwartz of Paint Your Event.

11/14
4 The Operation Stand Down Tennessee team with their NEXT Award for the Social Enterprise Growth category.

11/14
5 The ForceX, Inc., team celebrated their first NEXT Award as winners in the Technology Market Mover category.

education & policy

THE ACADEMIES OF NASHVILLE

The Nashville Area Chamber of Commerce proudly supports the Academies of Nashville, smaller learning academies in which students choose a thematic course of study, such as engineering, health care or International Baccalaureate, and learn in a relevant, hands-on environment with real-world application. This year, the Chamber continued its coordination of five industry-based Partnership Councils – involving nearly 100 business volunteers – who advised the district’s academies in specific industry areas. The Chamber also led the 25-member CEO Champions – a Chamber committee that advocated for public education throughout the year. The 2014 “My Future, My Way” Career Exploration Fair attracted 7,164 Metro freshmen who interacted with 98 business partners representing 318 career paths and participated in one-on-one interviews and interactive exhibits. The annual Academies of Nashville Awards celebrated excellent teachers, administrators and business partnerships before an audience of 300 community leaders. The Chamber also coordinated four VIP tours of the redesigned Middle Preps, which were attended by more than 200 community leaders. The Chamber’s support for the Academies of Nashville was recognized as an “Industry Exemplar” at the 2015 Association of Chamber of Commerce Executives annual conference in Montréal.



EDUCATION REPORT CARD

The Chamber released its 2014 Education Report Card, an annual review of the progress of Metro Schools compiled by a volunteer committee of community leaders. This year’s 25-member committee reported that MNPS made progress during the 2013-2014 year, and that strong and determined leadership at every level of Metro Schools is essential to future progress. The report outlined committee concerns related to the performance of the school system based on data and research. Committee recommendations currently being implemented by Metro Schools include developing internal processes for supporting school-level budget autonomy and rewarding teacher leaders with additional pay.

05/15 | *Antioch High School’s administrators and community partners celebrated a successful year of community engagement and student achievement at the 2015 Academies of Nashville Awards.*

12/14 | *A standing-room-only crowd attended the 2014 Education Report Card presentation to bear committee co-chairs reveal the year’s five recommendations aimed to improve academic outcomes for MNPS’ 86,000 students.*

05/15 | *The Nashville Chamber honored Mayor Karl Dean with its Chamber’s Choice Award in recognition of his critical, continued support for public education.*

12/14 | *Jesse Register, former director of schools for MNPS, Whitney Weeks of the Nashville Chamber and Kent Adams, Chamber board member and president and CEO, Caterpillar Financial Services Corporation, took full advantage of the red carpet treatment at the 2015 Academies of Nashville Awards.*

LEADERSHIP STUDY MISSION

The Chamber held its 24th annual Leadership Study Mission and second Transit Study Mission by taking a record-setting 114-member local and regional delegation to Salt Lake City to study best community development practices. More than 50 speakers in 27 sessions shared their expertise in such areas as multi-modal transit, community visioning and immigration reform. The Chamber launched its regional initiative, “Moving Forward – Transit Solutions for our Region,” during the visit.

NASHVILLE REGION’S VITAL SIGNS

Nashville Region’s Vital Signs is a collaborative process led by the Chamber and the Nashville Area Metropolitan Planning Organization to track key issues that impact the region’s economic well-being and activate community-driven solutions to address them. In 2014, the Vital Signs Action Team, a volunteer group of business and community leaders, identified the need to increase postsecondary attainment rates to meet the needs of employers as an immediate priority for action.

In partnership with regional mayors, the Action Team hosted six countywide convenings of higher education, K-12, business and other community leaders with regional mayors to determine opportunities for regional collaboration to accelerate progress in this area. Tennessee Promise, Gov. Haslam’s initiative to provide free community college for high school graduates, was targeted as a key opportunity. As a result, the Vital Signs Action Team developed a weekly dashboard to measure progress among school districts in a 15-county region in signing up high school seniors and recruiting mentors for the program. Ultimately, the region exceeded its goal on both measures, with 16,662 students applying (235 percent of goal) and 2,185 adults signing up to mentor (114 percent of goal). The coalition will continue to track student progress to and through postsecondary.



10/14 | Vital Signs Action Team Chair Christine Karbowski, Bridgestone Americas, Inc., released the 2014 Nashville Region’s Vital Signs report to the Middle Tennessee Mayors’ Caucus in October.

10/14 | Vital Signs Action Team leader Joe Harkins, Wheelhouse Marketing Advisors, and Nancy Eisenbrandt, Nashville Area Chamber, discussed regional priorities with Vital Signs Action Team leader MaryAnne Howland, Ibis Communications, during the release of the 2014 Nashville Region’s Vital Signs report in October.

10/14 | Vital Signs Action Team leaders Chuck Byrge, Harpeth Capital, LLC, and Ron Corbin, RBBC Holdings, discussed regional priorities during the release of the 2014 Nashville Region’s Vital Signs report in October.

05/15 | Leadership Study Mission delegates Christine Bradley, Vanderbilt University; Tari Hughes, Nashville Public Library Foundation; and LSM/TSM chair Mike Shmerling, XMi Holdings, deboarding TRAX, Salt Lake City’s light rail system. Credit: Deb Varallo

TENNESSEE PROMISE AND DRIVE TO 55 TIMELINE

The first Tennessee Promise dashboard, which was shared with stakeholders in early October, showed that 12 out of 15 counties fell short of meeting their goals for student applications.

- Middle Tennessee goal: 7,081
- Middle Tennessee starting point: 3,674 (52 percent of goal)

Only two of 15 counties had recruited enough mentors to work with students participating in Tennessee Promise.

- Middle Tennessee goal: 1,909
- Middle Tennessee starting point: 916 (48 percent of goal)

By the student application deadline in November, all of the counties in the region had exceeded their goal for student applications for the Tennessee Promise.

- Middle Tennessee goal: 7,081
- Middle Tennessee ending point: 16,662 (235 percent of goal)

By December, the region had exceeded its goal for mentor recruitment.

- Middle Tennessee goal: 1,909
- Middle Tennessee ending point: 2,715 (142 percent of goal)

2015 LEGISLATIVE SCORECARD

Each year, the Chamber publishes a legislative scorecard that details elected officials’ support for the Chamber’s board-adopted local and state legislative agendas.

On the state level, despite a challenging year for business on issues such as Medicaid expansion and employer property rights and firearms, the General Assembly supported 78 percent of Chamber priorities; there were also key wins in the area of economic development and K-12 education.

Tennessee will join a growing number of states by authorizing for-profit benefit corporations, a new designation which allows for-profit companies to make community impact part of their business model.

After more than a year of debate and uncertainty, Tennessee’s rigorous K-12 academic standards, formerly called Common Core State Standards, will undergo a review by state educators. New state assessments will be administered during the 2015-2016 school year, after a one-year delay.

On the local level, the Metro Council supported 87 percent of the Chamber’s legislative agenda items – this year numbering 16 pieces of legislation. These issues addressed such issues as support for small business that was part of the Chamber’s annual Partnership 2020 contract with Metro for economic development services; planning and zoning process solutions to lessen barriers to investment; and opposition to

additional government regulation of private business. To position itself with new Metro government leadership, the Chamber offered briefings throughout the year for mayoral, vice mayoral and Council candidates. Chamber staff held a total of 48 briefings and provided data and content overviews of the Chamber and its priority issues (economic development, education, transportation, regionalism).

The Chamber and the Greater Nashville Association of Realtors held a mayoral candidate forum with the seven candidates on June 8 using data points as the foundation for questions; in addition, each of the Chamber’s five Area Advisory Councils held candidate forums for Council district and at-large races respective to their areas.

ADVOCACY AND BUSINESS VOICE

The Chamber continued its advocacy partnerships with other regional partners – Rutherford County, Robertson County and Hendersonville Area Chamber members – by providing opportunities to participate in the Chamber’s annual policy survey and contact their representatives through Middle Tennessee Business Voice (midtnbusinessvoice.com), our online advocacy tool that allows businesses to learn about current legislative issues and directly contact their elected officials. Together, these Chamber members focused on 28 issues, sending close to 2,000 messages to elected officials this year.

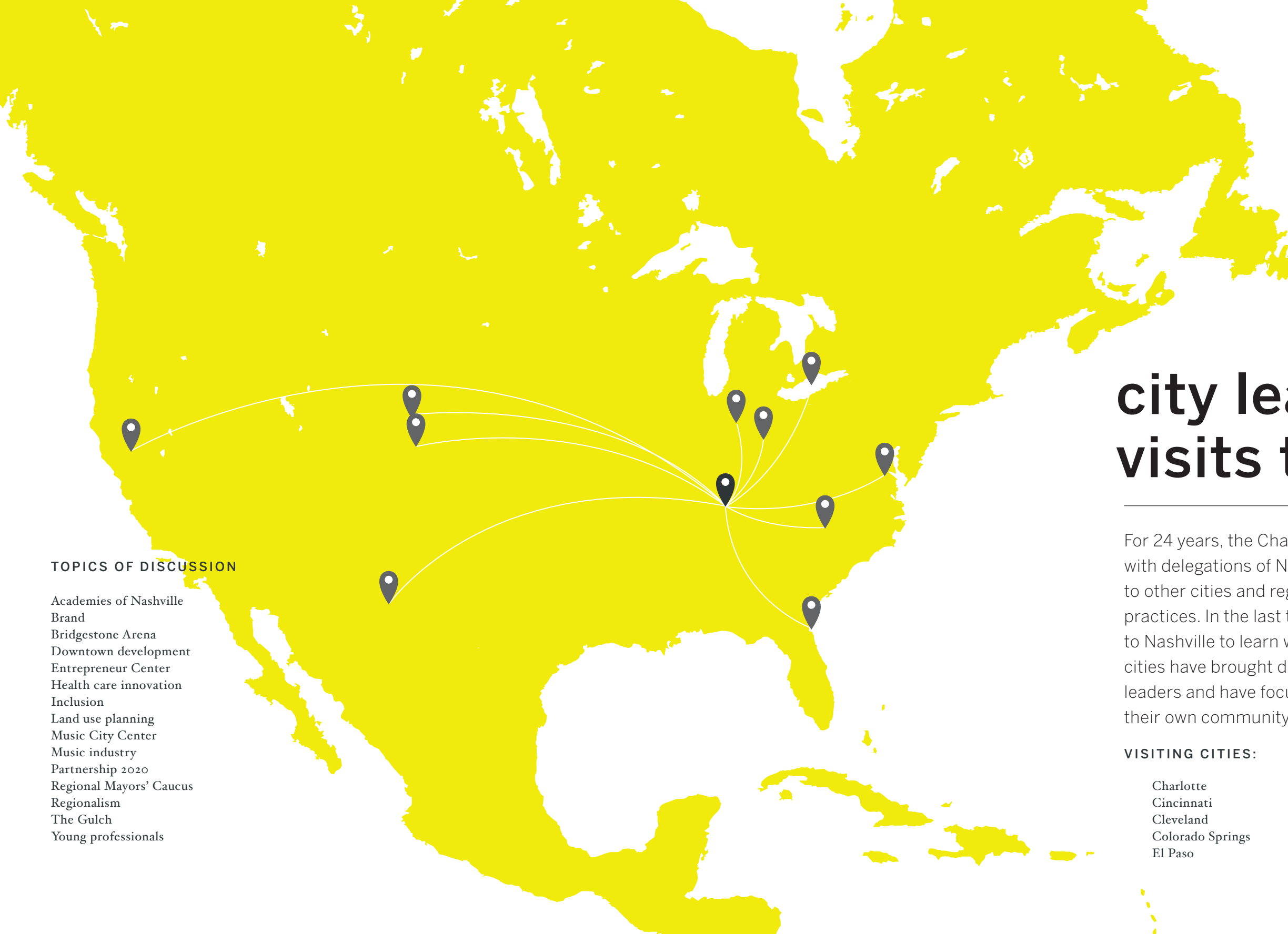


05/15
1 | The Chamber’s partnership with Metro was evident for 250 small business leaders at a business forum hosted by the Chamber and Mayor Karl Dean. The Chamber’s 2015 annual economic development contract, approved by Metro Council, includes additional dollars for small business programs.

06/15
2 | Lydia Lenker with Lipscomb’s College of Leadership and Public Service moderated a Metro mayoral candidate conversation hosted by the Chamber and the Greater Nashville Association of Realtors. In addition to presenting a series of candidate questions based upon Chamber research data, this forum was the first one in which candidates were able to ask each other questions.

06/15
3 | Chamber President and CEO Ralph Schulz spoke to reporters and downtown business owners in support of the downtown portion of Metro’s flood protection plan. The Chamber encouraged protection of the downtown core due to it being the economic engine of the county’s property and sales tax growth, funding vital services throughout Davidson County.

06/15
4 | Representing a 20-member coalition, Nashville Area Chamber of Commerce President and CEO Ralph Schulz answered reporters’ questions at a press conference about the negative impact of Metro Charter Amendment 3. The amendment requires all construction firms doing business with Metro government to allocate 40 percent of the work hours on any publicly funded project to Davidson County residents.



city leadership visits to nashville

For 24 years, the Chamber has led Leadership Study Missions with delegations of Nashville and Middle Tennessee leaders to other cities and regions to study timely and topical best practices. In the last three years, 25 delegations have traveled to Nashville to learn why we are the “It City.” These visiting cities have brought delegations that range from 25 to 200 leaders and have focused on a variety of issues important to their own community development.

VISITING CITIES:

Charlotte
Cincinnati
Cleveland
Colorado Springs
El Paso

Denver
Indianapolis
Jacksonville
Richmond
Sacramento

TOPICS OF DISCUSSION

Academies of Nashville
Brand
Bridgestone Arena
Downtown development
Entrepreneur Center
Health care innovation
Inclusion
Land use planning
Music City Center
Music industry
Partnership 2020
Regional Mayors’ Caucus
Regionalism
The Gulch
Young professionals

2015-2016 board of directors

| | |
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| Steve Turner Principal, Marketstreet Equities Company | |

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Hastings Architecture Associates, LLC
Hawkins Partners
HealthStream, Inc.
Hecate Energy
Heery International, Inc.
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Lexus of Cool Springs
LifePoint Hospitals
Lincoln College of Technology
Lithographics, Inc.
Littler Mendelson
LKQ Corp.
Loews Vanderbilt Hotel
Louisiana-Pacific Corporation
LPS Integration, Inc.
M&W Logistics Group, Inc.
Maggiano's Little Italy
Marco's Pizza - Middle Tennessee
Markraft Cabinets, Inc.
Marsh USA, Inc.
McNeely Pigott & Fox Public Relations
Meharry Medical College
Mesilla Valley Transportation
Messer Construction Company
Metropolitan Nashville Airport
Authority
Millennium Maxwell House Hotel
Morgan Stanley
Mrs. Grissom's Salads, Inc.
Nashville Airport Marriott Hotel
Nashville Cash & Carry
Nashville Marriott at Vanderbilt
University
Nashville State Community College
Neely Coble Company, Inc.
Nelson Mullins Riley &
Scarborough, LLP
Newk's Eatery
NewsChannel 5 Network - WTVF
North Highland Consulting
Northwestern Mutual Financial
Network
NSG
OakPoint Real Estate
Oberto Brands
OHL
Open Arms Care Corporation
Oracle Hospitality

Otaku South
Parsons Brinckerhoff
Paxton Van Lines, Inc.
Peak 10
Pillars Development
Pillsbury Winthrop Shaw Pittman, LLP
Premier Parking of Tennessee, LLC
Price's Collision Centers
Provista
PSC Metals, Inc.
Publishing Resources Group, Inc.
Qualifacts Systems, Inc.
Quality Industries
Quorum Health Resources
R.H. Boyd Publishing Corporation
Ragan-Smith Associates, Inc.
Rainforest Café
Raymond James
RegionalCare Hospital Partners
Remar, Inc.
ResCare Workforce Services
RICKBATSON.COM
Rio Grande Fence Co. of Nashville
RJ Young
Rogers Group, Inc.
Roof Maintenance of America
Russell Landscape
Ryan, LLC
Sandler Training
Sarah Cannon Research Institute
Schneider Electric
Second Harvest Food Bank of
Middle Tennessee
ServiceSource
Servpro of South Nashville
Siemens Industry, Inc.
Signature Healthcare of Nashville
Rehab & Wellness Center
Sitel
Skanska USA Building, Inc.
Smith Seckman Reid, Inc.
SMS Holdings Corporation
Soles4Souls
SpecialtyCare
Sprint
Sprintz Furniture Showroom
StaffMark
Standard Parking
Stephen Gould Corporation

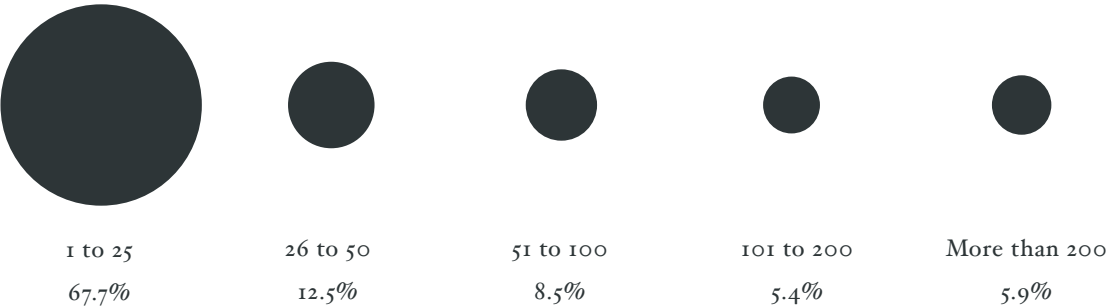
STG Design
Stites & Harbison, PLLC
Strategic Hospitality
Sunrise Contracting, Inc.
Sysco Nashville
T.W. Frierson Contractor, Inc.
Techno-Aide, Inc.
teknetex, Inc.
Tennessee Department of Human
Resources
Tennessee State University
Tessler Construction Company, Inc.
The Bank of Nashville
The Britt Hunt Company
The Buckingham Companies
The Buntin Group
The Center for Executive Education
at Belmont University
The Comfort Group
The Designory, Inc.
The Hermitage Hotel
The Human Capital Group, Inc.
The Mathews Company
The Southern Steak and Oyster
The Wealdstone Group, LLC
Thomas Nelson - HarperCollins
Christian Publishing
Thompson Machinery Commerce
Corporation
Toyota of Cool Springs
Trauger & Tuke
Trevecca Nazarene University
Tri Star Energy, LLC
Triumph Aerostructures - Vought
Integrated Programs Division
TSI
Turner Construction
Two Rivers Ford
U.S. Pest Protection, Inc.
Union Station Hotel
Union University Hendersonville
United Methodist Publishing House
United Way of Metropolitan Nashville
UnitedHealthcare
Universal Lighting Technologies
Urology Associates, P.C. & Urology
Surgery Center, L.P.
Vanderbilt University - Owen Graduate
School of Management

Vector Management
Verizon Wireless
VF Imagewear
Village Real Estate Services
Waste Management, Inc. of TN
Western Governors University
WEX | Fleet One
White Castle
Wirtgen America, Inc.
WKRN-TV, Channel 2
WSMV-TV, Channel 4
Wyatt, Tarrant & Combs, LLP
Wyndham Group
YMCA of Middle Tennessee
YouthMerch
Zycron, Inc.

financial & membership

Fiscal year 2014 - 2015

MEMBER COMPANIES BY NUMBER OF EMPLOYEES



- Partnership 2020 contributions
- Membership investment
- Program-generated revenue
- Sponsorship



- Economic development
- Investor relations
- Research and information services
- Education
- Workforce development
- Policy
- Communications
- Membership services (includes Area Advisory Councils)
- Programs and events/events support
- General and administrative (includes capital expenditures)

2015-2016 Budget

2014-2015 Actuals

| 2015-2016 Budget | | | | | 2014-2015 Actuals | | | | |
|--|---------------------|-------------------|-------------|---------------------|--|---------------------|-------------------|-------------|---------------------|
| REVENUE | PARTNERSHIP 2020 | EDUCATION 2020 | CHAMBER | COMBINED CHAMBER | REVENUE | PARTNERSHIP 2020 | EDUCATION 2020 | CHAMBER | COMBINED CHAMBER |
| Investor contributions (includes education) | \$3,741,951 | | | \$3,741,951 | Investor contributions (includes education) | \$3,483,000 | \$50,000 | | \$3,533,000 |
| Membership dues | | | \$1,776,545 | \$1,776,545 | Membership dues | | | \$1,750,460 | \$1,750,460 |
| Program revenue | \$728,530 | | \$598,599 | \$1,327,129 | Program revenue | \$414,130 | \$500 | \$461,206 | \$875,835 |
| Sponsorship revenue | | | \$978,836 | \$978,836 | Sponsorship revenue | | | \$779,675 | \$779,675 |
| | | | | | | | | | |
| TOTAL REVENUE | \$4,470,481 | | \$3,353,980 | \$7,824,461 | TOTAL REVENUE | \$3,897,129 | \$50,500 | \$2,991,340 | \$6,938,969 |
| | | | | | | | | | |
| EXPENSES | | | | | EXPENSES | | | | |
| | | | | | | | | | |
| Economic development | \$1,178,598 | | | \$1,178,598 | Economic development | \$946,084 | | | \$946,084 |
| Investor relations | \$366,798 | | | \$366,798 | Investor relations | \$297,290 | | | \$297,290 |
| Research and The Research Center | \$456,405 | | | \$456,405 | Research and The Research Center | \$451,000 | | | \$451,000 |
| Education | | \$658,624 | | \$658,624 | Education | | \$560,833 | | \$560,833 |
| Talent development | \$454,163 | | | \$454,163 | Talent development | \$315,371 | | | \$315,371 |
| Policy | \$715,360 | | \$4,000 | \$719,360 | Policy | \$600,823 | | \$1,584 | \$602,407 |
| Communications | | | \$409,812 | \$409,812 | Communications | | | \$289,825 | \$289,825 |
| Membership services | | | \$622,958 | \$622,958 | Membership services | | | \$647,114 | \$647,114 |
| Programs and events/events support | | | \$1,087,079 | \$1,087,079 | Programs and events/events support | | | \$958,073 | \$958,073 |
| General and administrative (includes capital expenses) | \$ 392,490 | | \$1,375,862 | \$1,768,352 | General and administrative (includes capital expenses) | \$392,429 | | \$1,244,701 | \$1,637,129 |
| | | | | | | | | | |
| TOTAL EXPENSES | \$3,563,814 | \$658,624 | \$3,499,711 | \$7,722,149 | TOTAL EXPENSES | \$3,002,997 | \$560,833 | \$3,141,297 | \$6,705,126 |
| | | | | | | | | | |
| NET EXCESS | \$906,667 | -\$658,624 | -\$145,731 | \$102,312 | NET EXCESS | \$894,133 | - \$510,333 | - \$149,957 | \$233,843 |

about the spirit of the chamber awards

The Chamber's work is made possible by the support of our members, particularly those who devote their time and energy to helping advance key priorities. Since 2008, the Spirit of the Chamber Awards have honored volunteers who have contributed the most toward the organization's purpose of facilitating community leadership to create economic prosperity. These volunteers help the Chamber accomplish results and position Middle Tennessee for continued success.

spirit of the chamber award: mike shmerling

In the past year, Mike Shmerling, XMi Holdings, has been involved in two initiatives that have a long-term impact on the future of our city and region – regional transit and Metro government fiscal stability. As chair of the 2015 Leadership/Transit Study Missions, he led one of the largest delegations in Chamber history to Salt Lake City, where community leaders learned from national models in multi-modal transit infrastructure, community visioning and immigration reform. The best practices from this visit have already been implemented in the recently unveiled Moving Forward regional transit initiative, which will unite leaders and organizations committed to creating a regional mass transit solution through a collaborative effort. Shmerling's other leadership role – as chair of Metro's Study & Formulating Committee – grew out of his role as chair of a Chamber board-appointed Metro Benefits Systems Task Force in 2012. The Study & Formulating Committee assesses the long-term fiscal integrity of Metro employee benefit plans. As committee chair, Shmerling presented recommendations earlier this year that could save Metro taxpayers from \$890 million to \$1.05 billion over time.





spirit of the chamber award: john aron

As a small business owner in the manufacturing sector, John Aron, The Pasta Shoppe, has been a longtime member of the Chamber's International Business Council (IBC) and an advocate for international trade and exporting. As a member of the IBC executive committee, he was instrumental in helping craft the IBC charter and strategic plan. He has also participated in IBC Day on the Hill, an annual event that educates and informs elected officials about the positive impact international companies bring to our region and state, and the effect immigration laws have on these businesses.

spirit of the chamber award: john morgan

John Morgan, Tennessee Board of Regents, is a strong ally and champion in the Chamber's postsecondary attainment initiatives and strategies. He supported the formation of the Middle Tennessee Regional Workforce Alliance, a public/private partnership between higher education, the public workforce system and business to address skills gaps and align higher education supply with business demand. To proactively tackle workforce challenges, the alliance created three business-led skills panels in high-growth, high-demand sectors vital to Middle Tennessee's economy: advanced manufacturing, health care and information technology. Morgan has committed senior staff to support the skills panels and a Lumina Community Partnership for Attainment grant that is being used to increase the number of Middle Tennessee residents with postsecondary credentials.





spirit of the chamber award: maryanne howland

MaryAnne Howland, IBIS Communications, has brought her enthusiasm and knowledge to several volunteer leadership roles as a Chamber member. She served three years as a Prosperity Leader; in this role, she was extremely engaged in helping ensure the Chamber achieved its state legislative agenda. She has also been part of the Vital Signs Action Team since the initiative was launched in 2013. Her strategic leadership has helped identify issues for regional action and community-driven solutions, particularly in the areas of postsecondary attainment and regional transit. She serves on the Chamber's board of directors and has been active in the newly formed Moving Forward initiative.

spirit of the region award: j.d. elliot

J.D. Elliott's presence will be missed, but his myriad leadership legacies will continue to shape the region for many years. His role in the health care industry qualified him as a leader even before he came to Nashville to run Nashville Memorial Hospital and the Memorial Foundation. Elliott's service and commitment to the priorities of Middle Tennessee nonprofits such as the Chamber never wavered over the decades. The Chamber's No. 1 priority – public education improvement – was his passion. As a member of the Chamber's Education 2020 leadership team, he helped transform teaching and learning in the Academies of Nashville. Due to Elliott's vision, the Memorial Foundation and the Chamber partnered to create the first-ever externships for Metro high school teachers. In an externship, teachers spend several days shadowing a business to see how their academic standards are applied in that industry or career. Over the past five years, 512 MNPS teachers have participated in 92 externships. Elliott continued his focus on education and health and wellness issues as a member of the Chamber's Vital Signs Action Team, which he served on since the initiative launched in 2013.



Clockwise from top right: J.E. Malone installs J.D. Elliott as president of the Nashville Memorial Hospital board in 1974.

The Memorial Foundation staff members: Donna Kay Vick, J.D. Elliott, Joyce Douglas, Scott S. Perry and Judy Milliken.

Anita and J.D. Elliott

J.D. Elliott leads a board meeting at Nashville Memorial Hospital in the mid-'70s.

J.D. Elliott, Stan Hardaway, Kem Hinton, Steve Johnson and Crews Johnston at the announcement of building the first phase of Bluegrass Commons.



spirit of the chamber recipients

2007-2008

Michelle Boucher, LP Building Products
Ron Samuels, Avenue Bank
Nelson Andrews, Brookside Properties
Jack Bovender, HCA
Bobby Mathews, The Mathews Company (posthumous award)
Greg Coleman, Colliers International

2008-2009

Tami Ross, THE original basket boutique
Charles Sueing, Nationwide Insurance/The Sueing Agency
Joyce Searcy, Bethlehem Centers of Nashville
Doug Brandon, Colliers Turley Martin Tucker
Tom Negri, Loews Vanderbilt Hotel

2009-2010

Bill Rochford, Vanderbilt University Medical Center
Thom Druffel, Holiday Inn Vanderbilt
Michael Shmerling, Choice Food Group, Inc.
and XMi Holdings, Inc.
Keith Herron, Regions Bank
The People of Nashville (accepted by Mayor Dean)

2010-2011

Pam Thomas, Piedmont Natural Gas
Renee Bradford, Hospice Compassus
Beth Chase, c/3 Consulting, LLC
Dave Berryman, Gibson Guitar
Clayton McWhorter, Entrepreneur Center
Nashville Predators

2011-2012

Steven André, Hutton Hotel
Lucia Folk, CMT
Eduardo Minardi, Bridgestone Corporation;
Bridgestone Americas, Inc.; Bridgestone Americas
Tire Operations
David Oliphant, Lithographics
Ben Freeland, Freeland Chevy Superstore
Jim Wright, Tractor Supply Company

2012-2013

Paula Lovell, Lovell Communications, Inc.
Ron Corbin, RBBC Holdings
LeShane Greenhill, Sagents Partners, LLC
Jeff Cogen, Nashville Predators
Ashley Segroves, Ashley Segroves Photography
& Bombshell Creative
Bert Mathews, The Mathews Company
George Lazenby, Emdeon

2013-2014

Kent Adams, Caterpillar Financial Services Corporation
Chris Holmes, FirstBank
Holley West, Applied Health Analytics
Roland Yarbrough, FedEx Office
Dr. Mike Schatzlein, Saint Thomas Health Services
Don Enfinger, BNY Mellon
Ken Knight, GM Spring Hill
Sheila Stern, Ascension Health

A REGION CONNECTED

partnership 2020 annual report

2014-2015

partnership 2020

The Nashville Area Chamber of Commerce's Partnership 2020 is the Nashville region's public-private economic development initiative, dedicated to the long-term vision for Middle Tennessee's economic prosperity. The Partnership was formed in 1990 to maintain and grow the Nashville region's economy by creating jobs through working with relocating and expanding businesses, attracting a talented and creative workforce, and developing and promoting a quality of place and livability. P2020 is supported by more than 275 business and community investors and measures key indicators over each five-year program cycle to ensure success, including job growth, income growth, population growth and public education gains.

PARTNERSHIP 2020 STRATEGIC DRIVERS

The P2020 plan focuses on four strategic drivers for the region's economy to continue to prosper and thrive.

ECONOMIC DIVERSITY

Providing quality employment opportunities, with emphasis on corporate operations, health care, advanced manufacturing, music, entertainment and creative fields, and supply-chain management;

TALENT DEVELOPMENT

Having a workforce that exceeds the needs of the employers that are starting, expanding and relocating in the region;

PLACE/LIVABILITY

Having a quality of life that continues to be a key asset to the region's economic prosperity; and

REGIONALISM

Collaborating with business leaders in the 10-county Nashville region to develop a unified approach to key issues that impact the region's economic future.

Mission Champions

HCA



REGIONS

Throughout Partnership 2020's 25-year history, the vision of our investors has led the Nashville region to national and global prominence as a top destination for talent, tourism and corporate investment.

Since its formation in 1990, the Partnership has supported the creation of more than 349,000 jobs in Middle Tennessee. In the last year alone, 154 companies announced relocations or expansions in the Nashville region, creating 17,562 new jobs and investing more than \$2.7 billion. Global brands such as Under Armour, HCA, Community Health Systems, Amazon, Bridgestone Americas and Warby Parker are growing and thriving here.

Last year, for the third year in a row, *Site Selection* magazine named the Nashville Area Chamber of Commerce one of the nation's top economic development groups, and the Bureau of Labor Statistics ranked Nashville as a top 10 metro for job growth. In addition, the WorkIT Nashville technology recruitment campaign received the highest award for communications excellence from Association of Chamber of Commerce Executives. And, in February, the Nashville Area Chamber unveiled the next five-year regional Partnership 2020 economic development strategy to ensure our region's future prosperity.

Our former Nashville mayor and P2020 co-chair Karl Dean often said that Nashville's best days are ahead of us, and his optimism is well-placed. Thank you for your investment, which helps make Middle Tennessee one of the best places in the world to live, work and grow a business. Let's continue to lead the way.

R Milton John

Milton Johnson
2013-2015 Co-chairman, Partnership 2020
Chairman & CEO, HCA

AUG 2014
OUTBOUND
MARKETING
TRIP TO NYC

The Partnership 2020 team travels to New York City for a marketing trip in conjunction with the Americanafest NYC music festival.

WORKIT
NASHVILLE
RECOGNITION

The WorkIT Nashville Recruitment Guidebook receives “Best in Show” for Communications Excellence from Association of Chamber of Commerce Executives.

SEP 2014
NEW SISTER
CITY IN JAPAN

Chamber leaders travel to Japan for the 37th annual SEUS-Japan meeting and signing of a formal Sister City agreement with Kamakura, Japan.

WARBY PARKER
RELOCATION

Warby Parker announces plans to open a Nashville office, its first outside of New York, creating 250 jobs in Davidson County.

OCT 2014
UNDER ARMOUR
RELOCATION

Under Armour, Inc. announces plans to invest \$100 million to build a new 1-million-square-foot distribution and warehousing facility that will create 1,500 new jobs in Wilson County.

FOREIGN
AMBASSADORS
VISIT

The International Business Council hosts 23 foreign ambassadors representing countries spanning five continents as part of the U.S. State Department’s Experience America program.

NOV 2014
BRIDGESTONE
AMERICAS
EXPANSION

Bridgestone Americas announces plans to invest \$232 million to build a new 500,000-square-foot office tower for its corporate headquarters, bringing 600 new jobs and 1,100 existing jobs downtown.

DEC 2014
M-TEK
HEADQUARTERS

M-TEK announces plans to build a new headquarters in Murfreesboro, investing more than \$13 million and adding 250 new jobs in Rutherford County.

JAN 2015
#2 TECH JOB
GROWTH

Fortune magazine recognizes Nashville as the No. 2 fastest-growing city for technology jobs.

FEB 2015
NEW ECONOMIC
DEVELOPMENT
STRATEGY

Partnership 2020 unveils its new five-year regional economic development strategy to investors.

#1 ADVANCED
MANUFACTURING
JOB GROWTH

Brookings Institute recognizes Nashville as the No. 1 metro for advanced manufacturing job growth.

UNIPRES
EXPANSION

Unipres USA Inc. announces a \$250 million expansion to its Portland facilities, creating 1,100 new jobs in Sumner County.

MAR 2015
TOP 10 FOR JOB
GROWTH

According to the Bureau of Labor Statistics, Nashville is one of the top 10 cities for job growth for the third year in a row, ranking eighth among large metros for job growth in 2014.

WHITE HOUSE
VISITS MIDDLE
TENNESSEE

Jerry Abramson, director of the White House Office of Intergovernmental Affairs, visited Goodlettsville-based manufacturer Des-Case to highlight the link between exports and job growth.

NISSAN
EXPANSION

Nissan North America announces plans to bring 1,000 new jobs to Smyrna as part of a \$160 million expansion to add a 1.5-million-square-foot supplier park.

APR 2015
YP MAYORAL
CANDIDATE
FORUM

YP Nashville hosts a mayoral forum at the Nashville downtown library, convening young professionals to engage with the seven candidates on issues related to their vision for Nashville’s future.

MAY 2015
TOP 10 ECD
ORGANIZATIONS

Site Selection magazine names the Nashville Area Chamber one of the top 10 economic development organizations in the nation.

CHS EXPANSION

Community Health Systems announces plans to invest more than \$66 million to expand its operations by constructing a new 240,000-square-foot shared services center in Antioch, creating 1,500 new jobs in Davidson County.

JUN 2015
MARKETING
TRIP TO SAN
FRANCISCO
BAY AREA

The Partnership 2020 team travels with investors and regional partners on a marketing trip to the San Francisco Bay area as Southwest Airlines launches nonstop service to Oakland, Calif., from Nashville International Airport.

fiscal year highlights

Partnership 2020 is the Nashville region’s public/private economic development initiative responsible for the creation of jobs and capital investment through business expansions and relocations.

past partnership chairmen

| | | | |
|---|---|---|--|
| 1990–1992 | 1992–1993 | 1993–1994 | 1994–1995 |
| Thomas J. Sherrard <i>Sherrard & Roe, PLC</i> | Richard W. Carden <i>Arthur Andersen (retired)</i> | Dennis C. Bottorff <i>Council Capital Management</i> | Owen (Bob) G. Shell, Jr. <i>Bank of America (retired)</i> |
| 1995–1996 | 1996–1997 | 1997–1998 | 1998–1999 |
| Clayton McWhorter <i>Clayton Associates, Inc.</i> | Craven Crowell <i>Tennessee Valley Authority (retired)</i> | Robert A. McCabe, Jr. <i>Pinnacle Financial Partners</i> | Doyle Rippee <i>Morgan Keegan & Company</i> |
| 1999–2000 | 2000–2001 | 2001–2004 | 2004–2005 |
| Terry London <i>Gaylord Entertainment Company</i> | Marty Dickens <i>AT&T (retired)</i> | Beth Mooney <i>AmSouth Bank</i> | Tom Beeman <i>Saint Thomas Health Services</i> |
| 2005–2008 | 2008–2010 | 2010–2013 | 2013–2015 |
| Jack O. Bovender, Jr. <i>Hospital Corporation of America (retired)</i> | C. Keith Herron <i>Regions Bank</i> | Jim Wright <i>Tractor Supply Co. (retired)</i> | Milton Johnson <i>Hospital Corporation of America</i> |

partnership 2020 marketing initiatives

The Partnership 2020 team maintained an aggressive marketing calendar in 2014-2015. With our regional partners and P2020 investors, the economic development team visited New York City, Los Angeles, San Francisco, Chicago, Austin, Atlanta, Phoenix, Vail and Puerto Rico. These proactive out-of-market trips included meeting with site consultants and active relocation and expansion prospects, as well as various company executives, to promote the advantages of doing business in Middle Tennessee. The P2020 team also hosted several top executive events and inbound marketing events to showcase the business assets of the Nashville region, build stronger relationships with our existing companies and welcome new CEOs to Nashville.



02/15 | Courtney Ross, Rhonda Rice and Heidi Smith represented Tennessee at the Site Selectors Guild annual conference in Puerto Rico.

06/15 | Business leaders and airport officials gathered in Oakland for a ribbon-cutting ceremony to celebrate Southwest Airlines' new nonstop service connecting Nashville and the Bay area.

Expansions

| | | | |
|-------------------------------------|----------------------------------|---------------------------------------|-------------------------|
| AAA Industries, Inc. | Davidson | Kennametal | Rutherford |
| Acadia Healthcare | Williamson | KHS America - <i>China</i> | Wilson |
| Advance Financial | Davidson | Kyowa - <i>Japan</i> | Robertson |
| Aegis Sciences Corp. | Davidson | Lochinvar LLC | Wilson |
| AIG | Davidson | Loden Vision Centers | Davidson |
| Amazon | Davidson and Rutherford | LogicForce Consulting | Davidson |
| American Addiction Centers | Williamson | Magna International - Canada | Maury |
| AspireHealth | Davidson | Mayekawa - <i>Japan</i> | Wilson |
| ATA Retail | Sumner | MediCopy Services, Inc. | Davidson |
| Atwood Mobile Products | Robertson | Medsolutions | Williamson |
| Avanti Manufacturing | Montgomery | Metal Quest, Inc. | Robertson |
| B & B Machine | Robertson | Metrican - <i>Canada</i> | Dickson |
| B&G Foods | Wilson | Morning Pointe Assisted Living | Williamson |
| Banc Card of America | Davidson | MSS | Davidson |
| Bavarian Polymers | Dickson | NASG | Sumner |
| Bedroc | Williamson | Nashville Shores | Davidson |
| BNI Corp. | Davidson | Nashville Wire Products Corporation | Davidson |
| Bridgestone Americas - <i>Japan</i> | Davidson, Rutherford and Dickson | National HealthCare Corporation | Davidson |
| Butler Snow | Davidson | NaviHealth | Williamson |
| Caleres | Wilson | Nissan - <i>Japan</i> | Rutherford |
| CapStar Bank | Davidson | Olhausen Billiards | Robertson |
| Cigna-HealthSpring | Davidson | Peakro | Williamson |
| Colson Tennessee | Sumner | Perma-Pipe | Wilson |
| Community Health Systems | Davidson | Pershing Yoakley & Associates | Williamson |
| Complete Holdings Group | Williamson | PFG Customized Distribution | Wilson |
| Confirmation.com | Williamson | Pinnacle Financial Partners | Davidson |
| Covance | Davidson | PwC | Davidson |
| Cowan Benefits | Williamson | QC Industrial Solutions | Cheatham |
| Cutwater Law | Davidson | R&B Motormite Dorman Products | Robertson |
| DAIDO | Robertson | Rae Products | Davidson |
| DeKalb Office | Davidson | Razor & Tie | Davidson |
| Delek US Holdings - <i>Israel</i> | Davidson | ReviveHealth | Davidson |
| Dell | Davidson | Schrader Electronics | Robertson |
| DePor | Robertson | Sekisui Plastics - <i>Japan</i> | Maury |
| DVL Seigenthaler | Davidson | ServiceSource | Davidson |
| Eco-Energy Global BioFuels | Williamson | Shiloh | Dickson |
| Emdeon | Williamson | Sperry Van Ness | Williamson |
| Fat Bottom Brewery | Davidson | Surecan, Inc. | Wilson |
| Federal-Mogul | Rutherford | TechnologyAdvice | Davidson |
| FedEx | Wilson | Tennsco | Dickson |
| FoxFuel Creative | Davidson | The Lampo Group | Williamson |
| GAP Distribution Center | Sumner | Topre America - <i>Japan</i> | Rutherford |
| General Mills | Rutherford | Tractor Supply Co. | Williamson |
| General Motors | Maury | TriStar Southern Hills Medical Center | Davidson |
| Gresham Smith and Partners | Davidson | Truform | Dickson |
| Haemonetics | Wilson | TWB/Worthington Industries | Davidson |
| Healthstream | Davidson | UBS | Davidson and Williamson |
| Healthways | Williamson | Unipres USA, Inc. - <i>Japan</i> | Sumner |
| Ingram Content Group | Davidson | VantagePointe Village | Cheatham |
| InsBank | Davidson | Verizon Wireless | Williamson |
| Internal Revenue Service | Williamson | Willis North America, Inc. | Davidson |
| Interstate Warehousing | Rutherford | Worthy Publishing | Williamson |
| IQTalent | Davidson | Xerox | Davidson |
| Jagemann Precision Plastics | Rutherford | | |
| Johnson Electric - <i>Hong Kong</i> | Robertson | | |

Relocations

| | |
|---|------------|
| Airtech International | Robertson |
| Automated Health Systems, Inc. | Davidson |
| Bear Communications | Sumner |
| Boyden and Youngblutt Advertising and Marketing | Williamson |
| Brown Brothers Harriman and Co. | Davidson |
| Canaccord Genuity - <i>Canada</i> | Davidson |
| Comprehensive Logistics | Maury |
| ComputeCycles | Williamson |
| DCI | Sumner |
| DENSO Logistics - <i>Japan</i> | Wilson |
| Diasol | Wilson |
| Different Drummer | Davidson |
| Go West Creative Group | Davidson |
| Gruppo Concorde - <i>Italy</i> | Maury |
| Iron Yard | Davidson |
| Leavens, Strand & Glover LLC | Davidson |
| Madison Mill, Inc. | Cheatham |
| Manhead Merchandising | Davidson |
| Maplehurst Bakeries | Wilson |
| McAngus Goudelock & Courie | Davidson |
| Mizzouri | Williamson |
| M-TEK - <i>Japan</i> | Rutherford |
| Omega Apparel | Davidson |
| Polsinelli | Davidson |
| Propper International | Dickson |
| Relevant Communications | Davidson |
| RocketFuel | Davidson |
| Rubin Brown | Davidson |
| Rural Media Group | Davidson |
| Samuel Son & Co. | Maury |
| Scott Hamilton Proton Therapy Center | Williamson |
| Shiloh Industries | Montgomery |
| Sony Music | Davidson |
| Steriliz | Williamson |
| Under Armour | Wilson |
| Warby Parker | Davidson |
| Wilson County Tire & Retreading | Wilson |

partnership 2020 progress report

| | 2014-2015 ONE-YEAR GOAL | 2014-2015 ONE-YEAR ACTUAL | 2011-2015 FIVE-YEAR GOAL | PERCENT OF FIVE-YEAR GOAL ACHIEVED <i>(after four years)</i> |
|---|----------------------------|------------------------------|-----------------------------|---|
| Employment growth averaging 1.5% per year in the region | 10,000 | 43,175 | 50,000 | 221.6% |
| Population growth averaging 1.5% per year in the region | 26,814 | 38,678 | 119,796 | 111.0% |
| Per capita income increase by 1.6% average per year in the region | \$677 | \$1,218 | \$3,305 | 205.4% |
| GDP increase of 2.3% on average per year in the region | \$1,973,308,000 | \$3,479,000,000 | \$9,892,000,000 | 193.3% |
| Recruit new employers to Middle Tennessee: | | | | |
| Total announced relocations | 30 | 37 | 150 | 102% |
| Percentage of relocations in five target industry sectors | 75% | 92% | n/a | n/a |
| Support the retention & expansion of existing businesses: | | | | |
| Total announced expansion projects | 50 | 117 | 250 | 158% |
| Percentage of expansions in five target industry sectors | 75% | 91% | n/a | n/a |

jobs & investment scorecard 2014-2015

Relocations

37
announced projects

5,109
announced jobs

\$526,462,900
capital investment announced

3,165,725
square footage of space to be occupied

Expansions

117
announced projects

12,453
announced jobs

\$2,209,336,740
capital investment announced

6,343,958
square footage of space to be occupied

7,410
jobs retained by existing companies

Total

154
announced projects

17,562
announced jobs

\$2,735,799,640
capital investment announced

9,509,683
square footage of space to be occupied

7,410
jobs retained by existing companies

28%
of jobs created through foreign direct investment

economic development regional partners

Partnership 2020 has succeeded largely because of collaboration among the Nashville Area Chamber and our regional partners throughout the 10-county economic market. These organizations understand that teamwork is the key to prosperity. We appreciate the regional economic development, government and chamber organizations that support P2020:

- Cheatham Connect
- City of Gallatin Economic Development Agency
- City of Goodlettsville
- Clarksville/Montgomery County Economic Development Council
- Dickson County Chamber of Commerce
- Forward Sumner Economic Council
- Joint Economic and Community Development Board of Wilson County
- Maury County Chamber and Economic Alliance
- Metropolitan Government of Nashville and Davidson County
- Robertson County Chamber of Commerce
- Rutherford County Chamber of Commerce
- Tennessee Valley Authority
- Williamson, Inc.

MONTGOMERY
2 announcements
170 jobs

ROBERTSON
11 announcements
618 jobs

SUMNER
7 announcements
1,808 jobs

CHEATHAM
3 announcements
295 jobs

DICKSON
7 announcements
267 jobs

DAVIDSON
63 announcements
6,659 jobs

WILSON
15 announcements
2,457 jobs

WILLIAMSON
29 announcements
1,997 jobs

RUTHERFORD
11 announcements
2,463 jobs

MAURY
6 announcements
828 jobs

international business

The purpose of the Chamber’s international business efforts is to create economic prosperity by promoting the growth and development of Middle Tennessee as a place where international businesses thrive by:

- BUILDING AND CULTIVATING RELATIONSHIPS**
which create opportunities for foreign direct investment;
- CONNECTING**
global companies with critical resources;
- SERVING**
as Middle Tennessee’s international information resource;
- PROMOTING**
the Nashville region as a center for international business; and
- ENGAGING**
Middle Tennessee’s international business community.



TOP COUNTRIES DOING BUSINESS IN MIDDLE TENNESSEE:
Japan
UK
Canada
Germany
Switzerland

Foreign Direct Investment in the Nashville Region

- Foreign-owned company locations: 277
- Employment: nearly 49,000

Exports

- Nashville MSA: \$9.6 billion (10.5 percent increase from 2013)
- Nashville MSA exports account for 30 percent of state export total (\$33 billion)

10/14

1

Nashville Area Chamber President and CEO Ralph Schulz was interviewed by international media outlet CCTV about how Nashville’s “creative class” of musicians and songwriters create an environment of innovation and risk-taking in Music City.

02/15

2

UK Consul General Jeremy Pilmore-Bedford, German Consul General Christoph Sander, Klint Alexander with Baker Donelson and FedEx Express Senior Counsel David Short discuss the Transatlantic Trade and Investment Partnership.

06/15

3

IBC Board Member John Scannapieco (left) addresses the SEUS-CP Alliance heads of delegation.

03/15

4

Jerry Abramson, deputy assistant to the President Obama and director of intergovernmental affairs, joined Mayor Karl Dean and Des-Case Corporation CEO Brian Gleason for a tour of their Goodlettsville facility.

03/15

5

6

Des-Case CEO Brian Gleason explains the production process to Congressman Jim Cooper, IBC board member John Scannapieco, White House official Jerry Abramson and Mayor Karl Dean.



GLOBAL MEDIA COVERAGE

News of Nashville’s growth has reached beyond U.S. borders. In addition to buzz-generating profiles in national publications like the *New York Times*, global media outlets like Chinese national media giant CCTV have come to Music City to gather insight on the music scene and how Nashville’s creative class impacts the local economy. London-based magazine *The Economist* also sent columnist David Rennie to Nashville to interview Chamber President and CEO Ralph Schulz about the business community’s role in defeating the English-only ballot referendum in 2009 and in maintaining a welcoming environment for immigrants.

2014-2015 INTERNATIONAL BUSINESS COUNCIL ADVISORY BOARD LEADERSHIP

The International Business Council Advisory Board is comprised of a cross-section of the region’s international business leaders. This volunteer group serves as advisors to the Chamber and as advocates for international businesses operating in or considering investing in Middle Tennessee.

Chairman

Bert Quintana
President and CEO, Sitel

Vice chairman

Jim Shepherd
President, Carlex Glass

Immediate past chairman
Rick Olszewski
Executive vice president, sales and marketing, LP Building Products

EXECUTIVE COMMITTEE

John Aron
President and CEO, The Pasta Shoppe, LLC (past chairman)

Gabriel Asbun
President, Latin America, Bridgestone Americas Tire Operations

Dave Berryman
President, Gibson Brands, Inc. (past chairman)

Bob Percy
Managing director, Embraer



07/14
1 | 2014 Nashville Emerging Leader Awards emcee Laura Hollingsworth with 2014 Human Resources recipient Jessika Poirier and 2013 judge Angela Ellis.

07/14
2 | Recognizing several of the 2014 Nashville Emerging Leader Award finalists, including Aaron Dorn, Laurel Fisher and Dalila Duarte.

07/14
3 | Emcee Laura Hollingsworth and 2013-2014 YP Nashville Chair Mary Beth Ikard with Impact Award recipient Dr. Jesse Register.

09/14
4 | Representing WorkIT Nashville at the third annual SoBro Fest, a festival designed to highlight businesses in the South Broadway neighborhood.

WORKIT
NASHVILLE.COM

MORE THAN
2,600

candidates in 45
states and 121
countries have
conducted

MORE THAN
386,000

job searches.

SEVENTY-FIVE
PERCENT

have a bachelor's
or master's degree,
and 51 percent of
the candidates have
more than five years
of experience.

YP NASHVILLE

YP Nashville
partnered with

MORE THAN 50

young professional
organizations
in Middle Tennessee,
resulting in a

98 PERCENT
RETENTION RATE

of our YP partner
organizations. We
also reached

MORE THAN
30,000

individuals through
events and digital
communications.

talent development

WORKIT NASHVILLE

Since launching in February 2013, WorkIT Nashville has been a strong platform to attract and retain highly qualified technology talent to the Nashville region. The WorkIT Nashville Guidebook has been a driving force in selling the region's quality of place and life, and was awarded "Best in Show" for Communications Excellence by the Association of Chamber of Commerce Executives, a national organization for chambers, in 2014.

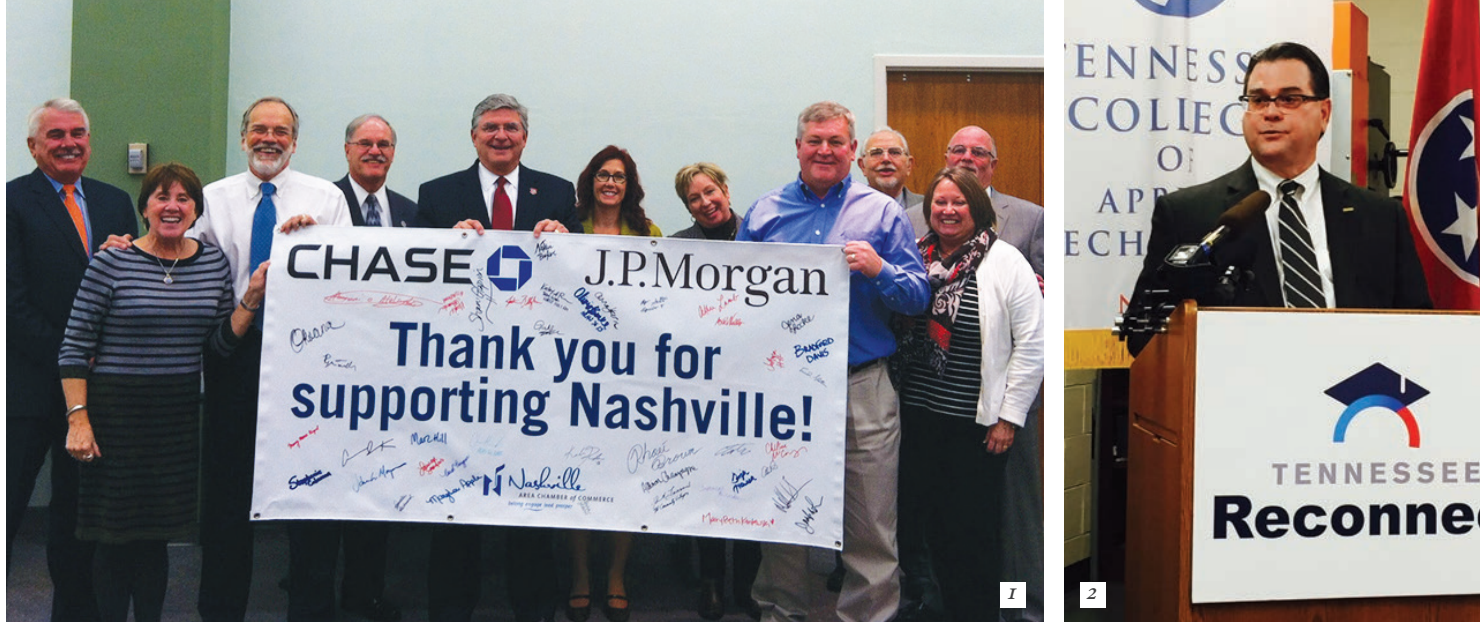
In 2014, Susan Ringley, senior recruiter for UBS Nashville, was recognized as our WorkIT Nashville Advocate of the Year for her work to spread the word about Nashville's growing technology community.

YP NASHVILLE

Each year, YP Nashville exceeds its goal of connecting with the best and brightest young professional talent, engaging them in work across the community and empowering them to be the future leaders of our region.

In July 2014, YP Nashville celebrated the eighth annual Nashville Emerging Leader Awards, recognizing 75 finalists and 15 winners under age 40 for accomplishments in their respective fields, demonstrated leadership and involvement in community-service activities throughout Middle Tennessee.





LUMINA COMMUNITY PARTNERSHIP FOR ATTAINMENT

As a result of our regional workforce alliance collaboration, Lumina Foundation invited Nashville to apply to join their Community Partnership for Attainment. In October 2014, the Nashville Area Chamber received a \$170,000 grant to increase postsecondary attainment among Middle Tennessee adults who attended college, but didn't complete a degree. The funds will be used through the end of 2016 to accomplish four main objectives:

UNDERSTANDING

Build and improve institutional understanding and support for adult learners.

CONNECTION

Connect adults to career opportunities and the necessary credentials and degrees by building career pathway maps in the skills panel sectors.

SUPPORT

Build employer and community support for adult learners to complete credentials and degrees and leverage Gov. Haslam's Drive to 55 initiative.

GUIDANCE

Build the workforce and institutional system capacity to guide and support adult learners.



To improve practices to support the unique needs of adult students, the grant also funds assessments of adult learning-focused institutions. Four community colleges and two Tennessee Colleges of Applied Technology in the region completed the assessment, enabling them to apply for adult learning improvement grants through the Tennessee Higher Education Commission. Lumina Foundation funded an additional \$50,000 in technical assistance to deploy the resources of the Graduate! Network in our region. The Graduate! Network is a national leader in effective processes, marketing, training and measurement tools to engage and support adults to return to college. Eight counties have formed the Middle Tennessee Reconnect Network to build community and employer support for adult learners. We will leverage Drive to 55 and Tennessee Reconnect resources, along with Lumina Foundation funding and technical assistance, to build a workforce-ready region and increase prosperity of our citizens and the region's economic prosperity.

THE MIDDLE TENNESSEE WORKFORCE ALLIANCE AND SKILLS PANELS

Launched in July 2013, the regional skills panels are a best practice model in establishing a regional collaboration with business, the public workforce system and postsecondary education to align education to business needs and address key skills gaps. Volunteers and staff have made numerous presentations at national workforce meetings and to city delegations visiting Nashville over the past year.

Tennessee has 13 community colleges, and over time, inconsistencies have developed across curricula within the same degree programs. Skills panel businesses are advising Tennessee Board of Regents staff as they work to streamline community college curricula across the state. Information technology skills panel businesses were asked to help review curricula for IT programs from the 13 community colleges. Before this review, the colleges offered two information technology degree programs, 35 concentrations and more than 400 courses. As a result of the input from the IT skills panel employers, the community colleges agreed on one IT degree, seven concentrations and some 100 courses. The advanced manufacturing skills panel has begun a similar curriculum review with the manufacturing degrees offered by community colleges.

11/14

1

The members of the Skills Panel Governance Board thank JPMorgan Chase & Co. for making the 2015 workforce study possible.

04/15

2

Joey Hatch, Vital Signs Postsecondary Education co-leader, speaking at the Tennessee Reconnect Launch.

06/15

3

Sumner County leaders build adult pathways to college.



p2020 strategic plan

In February, Partnership 2020 introduced a new five-year economic development strategy.

Leaders of the Nashville Area Chamber of Commerce’s Partnership 2020 economic development initiative unveiled the next phase of P2020’s five-year strategy for increasing the economic vibrancy of the Nashville region before a crowd of P2020 investors. P2020 co-chairs Nashville Mayor Karl Dean and HCA Chairman and CEO Milton Johnson discussed how the initiative will broaden its focus on a number of measures being tracked as indicators of economic health.

metropolitan product. The new strategy focuses on three key strategic drivers that will not only build on Middle Tennessee’s achievements, but also identify areas of progress and critical need to ensure the region’s future economic vitality. These are economic prosperity, talent development and maintaining Nashville’s quality of life/sense of place. Commitment to effective regionalism is the unifying attribute that supports all three strategic drivers.

The new P2020 plan has identified additional metrics related to traffic congestion and educational attainment, in addition to its traditional measurements of job growth, wage growth, increases in population and gross

The new strategy will launch in July 2016 with an action plan developed by regional business and community leaders that is designed to drive progress in each of the strategy’s key measures.



02/15

1

Partnership investors and business leaders attended the February launch of the Partnership 2020 new five-year economic development initiative at the Bridge Building.

2

06/15

3

In July, Jim Schmitz, executive vice president and Middle Tennessee area president for Regions Bank, was named the new co-chairman of Partnership 2020 for the 2015-2016 fiscal year. In this role, Schmitz will work with the Chamber’s economic development staff and P2020 investors to continue economic growth in Middle Tennessee.

p2020 investors

LEAD INVESTORS \$101,000 AND HIGHER

Bank of America
Bass, Berry & Sims, PLC
Bradley, Arant, Boulton, Cummings LLP
Caterpillar Financial Services Corporation
Deloitte, LLP
Fifth Third Bank
First Tennessee Foundation
Genesco, Inc.
HCA
Ingram Industries, Inc.
LifePoint Health, Inc.
Louisiana-Pacific Corporation
MarketStreet Enterprises, LLC
Metropolitan Government of Nashville and Davidson County
Nashville Electric Service
Pinnacle Financial Partners
Regions Bank
Ryman Hospitality Properties
Saint Thomas Health
Shoney's, Inc.
SunTrust Bank
Tennessee Valley Authority
The Memorial Foundation, Inc.
TN Media
Tractor Supply Company
U.S. Smokeless Tobacco Company, LLC
Vanderbilt University
Waller

LEAD INVESTORS \$75,000-\$100,000

Adams and Reese, LLP
AmSurg Corporation
Asurion
Baker Donelson
Barge, Waggoner, Sumner & Cannon, Inc.
Bell and Associates Construction, LP
BKD, LLP
BNY Mellon
Branch Banking & Trust Co. (BB&T)
Bridgestone Americas, Inc.
Butler, Snow, O'Mara, Stevens & Cannada, PLLC
CBRE
CCA
Cheekwood Botanical Garden and Museum of Art
CLARCOR
Community Health Systems, Inc.
Country Music Association, Inc.
Cushman & Wakefield
Delek US Holdings, Inc.
Delta Dental of Tennessee
Dollar General Corporation
Emdeon, Inc.
Ernst & Young LLP
ESa
FirstBank
Gaylord Opryland Resort & Convention Center

Grand Avenue Worldwide
Gresham Smith & Partners
Interior Design Services, Inc.
Jackson National Life Insurance Company
JPMorgan Chase & Co.
KPMG, LLP
LBMC & Affiliates
Mars Petcare U.S.
Metropolitan Nashville Airport Authority
Nashville Predators
Ogletree, Deakins, Nash, Smoak & Stewart
Piedmont Natural Gas
PNC Bank
PwC
RE/MAX Elite
Skanska USA Building, Inc.
SpecialtyCare
The Bank of Nashville
The Lawrence Group
UBS
Wells Fargo

PARTNERSHIP 2020 INVESTORS

365 Data Centers
Ajax Turner Company
Alex S. Palmer & Company
Alfred Williams & Co.
American Constructors, Inc.
AmUSA
APEX & Robert E. Lee Moving and Storage
Armstrong Relocations
AT&T
Avenue Bank
Avison Young
BancorpSouth
Bank of Tennessee
BDO USA, LLP
Belmont University
Berkshire Hathaway HomeServices Woodmont Realty
BlueCross BlueShield of Tennessee, Inc.
BOHAN Advertising / Marketing
Boyle Nashville, LLC
Brand Imaging Group
Brasfield & Gorrie, LLC
Burr & Forman, LLP
Bytes of Knowledge
C.B. Ragland Company
c/3 consulting, LLC
CapStar Bank
Carter Group, LLC
Centric Architecture

CGS Administrators, LLC
Chas. Hawkins Co., Inc./CORFAC International
Choice Food Group
City of Gallatin Economic Development Agency
City of Goodlettsville
Civil Site Design Group, PLLC
Clarksville-Montgomery County Economic Development Council
CMT
Colliers International | Nashville
Cordia Management, Inc.
Crain Construction
Cresa Nashville
Crye-Leike Relocation Services
Cummins Station/DZL Management Co.
D. F. Chase, Inc.
Dell, Inc.
DET Distributing Co.
Dickinson Wright, PLLC
Dickson County Chamber of Commerce
Direct Travel
Diversified Trust Company
DoubleTree by Hilton Hotel Nashville-Downtown
Duke Realty Corporation
DVL Seigenthaler
DWC Construction Company, Inc.
Dynamic Edge, Inc.

Eakin Partners, LLC
Elmington Capital Group
eMids Technologies, Inc.
ESCU
Facility Planners, Inc.
First Advantage Bank
ForceX, Inc.
Forward Sumner Economic Council
Franklin Road Academy
Fridrich & Clark Realty, LLC
Frost Brown Todd, LLC
Gallagher Benefit Services, Inc. | Arthur J. Gallagher Risk Management Services
Gobbell Hays Partners, Inc.
Goodwyn | Mills | Cawood
Greater Nashville Association of Realtors, Inc.
Green & Little, L.P.
GS&F
Gullett Sanford Robinson & Martin, PLLC
Hall Strategies, LLC
Harpeth Capital, LLC
Hastings Architecture Associates, LLC
HDR | ICA
Highwoods Properties
Hilton Nashville Downtown
Hoar Construction
Holladay Properties

HST Interior Elements
Hutton Hotel
IASIS Healthcare, LLC
InfoWorks, Inc.
Internpreneur, LLC
IRIS Networks, LLC
Jack B. Turner and Associates
Jackson Thornton
Joint Economic & Community
Development Board of Wilson County
Jones Lang LaSalle
Journal Communications, Inc.
Kabat Real Estate Solutions
KraftCPAs, PLLC
Kroger
LDA Engineering, Inc.
Lee Company
LifeWay Christian Resources
Lincoln Property Co.
Lipscomb University
Littlejohn Engineering Associates, Inc.
Littler Mendelson, P.C.
LoJac Companies
Lovell Communications, Inc.
Maury County Chamber &
Economic Alliance
McNeely Pigott & Fox Public
Relations, LLC
Messer Construction
Middle Tennessee State University

Mitsui & Co. (U.S.A.), Inc.
Nashville Business Journal
Nashville State Community College
Nelson Mullins Riley & Scarborough LLP
North Highland
Now Leasing, LLC
OakPoint Real Estate
OHL
Onora Group
Paradigm Group
Paramore | the digital agency
Parks
Patterson Intellectual Property Law
Peak 10, Inc.
Pilgrim Consulting
Quanta Manufacturing Nashville
Quorum Health Resources, LLC
R.C. Mathews Contractor/The
Mathews Company
Randstad USA
Renaissance Nashville Hotel
Renasant Bank
Robertson County Chamber of
Commerce
Rogers Group, Inc.
Rutherford County Chamber of
Commerce
Ryan Search & Consulting
Ryan, LLC
S&ME, Inc.

Schneider Electric
Second Harvest Food Bank of
Middle Tennessee
ServiceSource
Sharpe Enterprises
Sherrard & Roe, PLC
Siemens Industry, Inc.
SmartSpace, LLC
Smith Seckman Reid, Inc.
Soles4Souls
Southeast Venture LLC
Southwest Airlines
Spectrum Properties I Emery, Inc.
SSOE Group
Standard Functional Foods Group
STG Design
Stites & Harbison, PLLC
Synergy Business Environments
T. W. Frierson Contractor, Inc.
Tennessee State University
Terracon
The Ashton Real Estate Group of
RE/MAX Elite
The Buntin Group
The Frist Foundation
The Human Capital Group, Inc.
The Lipman Group | Sotheby's
International Realty
TMPartners, PLLC
Trevecca Nazarene University

Truxton Trust
TTL, Inc.
Tuck Hinton Architects
Turner Construction Company
TVV Capital
United Way of Metropolitan Nashville
University of Tennessee - Center for
Industrial Services
Vaco, LLC
Virsys12
Virtus Benefits, LLC
Western Express
Wieck Construction, LLC
Williamson, Inc
Willis
Wolverton & Associates
Wood Personnel Services, Inc.
Wright Travel
Yates Construction
YMCA of Middle Tennessee
Zeitlin & Co., Realtors
Zycron, Inc.

the research center

The Nashville Area Chamber of Commerce's Research Center provides each client with hands-on research rooted in a data-driven approach that has been nationally recognized.

Led by Dr. Garrett Harper, the Research Center's work has appeared in *The Wall Street Journal*, *TIME*, *Billboard* and *The Atlantic*, among others. One-on-one interviews, focus groups and surveys of stakeholders and industry leaders elicit a full understanding of the context behind the numbers and trends. Chamber research does not merely take quantitative data at face value; trends often mask part of an industry's story. End products for research clients engage many levels of planning and analysis to support industry needs and goals for growth. Regardless of the scope of your project, the Chamber's Research Center is equipped to deliver the data you need to feel confident in your results.

The Research Center worked with Washington, D.C.-based FTI Consulting's Center for Healthcare Economics and Policy to publish a groundbreaking report titled *Assessment of Nashville Region Health, Cost, Access and Quality*. This study, the result of a two-year collaboration, establishes an innovative model of

stakeholder involvement to develop strategies and application of the model and research findings.

As part of ongoing research into the regional dynamics of the Nashville and Clarksville MSAs, the Research Center developed key material addressing the importance of Ft. Campbell and the military to the region and published *Joint Metro Region: International Community*, a report examining the role of international businesses and foreign-born residents in the Nashville and Clarksville areas. Findings were issued at the Department of Defense listening session in January and at the fourth annual Clarksville Growth Summit in May.

For the Leadership Study Mission to Salt Lake City, the Research Center authored the 2015 Datascape report. This annual publication provides context for Leadership Study Mission delegates by comparing the Nashville area's economic performance and demographic breakdown

to the visit host city. Association of Chamber of Commerce Executives, North America's largest trade association for chambers, recognized the 2014 Datascape with the Award of Excellence for publications.

The Research Center also analyzed data for the 2014 *Nashville Region's Vital Signs*, the second annual report showcasing action-oriented data and analysis on major topics in the Nashville region, including an indicators dashboard and featuring trends in education, health and transportation. For the first time, the report included data from the Clarksville MSA.

Supported by Welcoming America, a national organization focused on the issues and opportunities of immigrant populations, the Research Center produced *Welcoming Nashville: Perspectives and Trends*, a report highlighting the perspective of business and community leadership on the contribution of immigrant populations to the economic performance of the region.



01/15
I

Army Brig. Gen. Roger Cloutie addressed attendees at a public hearing on the future of military staffing at Ft. Campbell. The Chamber's Research Center supplied a detailed analysis of the economic impact of force reductions at the post on surrounding communities to educate Pentagon officials on potential GDP losses from military budget cuts.

01/15
3

Gov. Bill Haslam spoke to a panel of Pentagon officials about the effect of Ft. Campbell budget cuts on Clarksville and surrounding communities. Force reductions that were initially placed at 16,000 soldiers were eventually reduced to a cut of only 363.

06/15
2

Jeremy Kane, one of seven Metro Nashville mayoral candidates, responds to a question about economic development during the Chamber and the Greater Nashville Association of Realtors mayoral candidate conversation. The Chamber's Research Center staff analyzed data that was projected during the event and served as the basis of the event's questions.

06/15
4

Garret Harper, vice president of the Nashville Area Chamber's Research Center, confers with the outgoing chair of the Chamber's Business Conditions Council Rob Gordon of Nashville Public Radio and incoming chair Paula Harris of engineering and architectural firm Barge Waggoner.

nashville health care council

Celebrating its 20th anniversary this year, the Nashville Health Care Council is a premier association of health care industry leaders working together to further establish Nashville’s position as the nation’s health care industry capital.

Supported by nearly 300 corporate members, the Council serves as a trusted source for information on trends that influence the health care industry. The organization provides members with one-of-a-kind networking opportunities and access to Nashville’s elite health care business community.

ABOUT NASHVILLE’S HEALTH CARE INDUSTRY

LARGEST ECONOMIC SECTOR

Health care is Nashville’s largest economic sector, with an impact of \$39 billion and 250,000 jobs to the local economy annually.

REVENUE & JOB CREATION

Globally, Nashville’s health care industry generates more than \$73 billion in revenue and 500,000 jobs.

REGIONAL & INTERNATIONAL

Nearly 400 health care companies have operations in Nashville and work on a multi-state, national or international basis. Nashville is also home to more than 400 professional service firms that provide expertise in the health care industry.

NASHVILLE AS HEADQUARTERS

Sixteen publicly traded health care companies are headquartered in Nashville.



02/15 | Marcus Osborne, vice president of health and wellness payer relations at Walmart, speaks at a Council “Trends and Influencers” event. The Nashville Health Care Council hosted more than 70 events for more than 7,500 attendees this year.

08/14 | Nashville Health Care Council programs provide member executives with unparalleled access to national policymakers, industry innovators and thought leaders. Elizabeth Holmes, founder and CEO, Theranos, leads a discussion along with Sen. Bill Frist, M.D. and Larry Van Horn, health care management and economics professor at the Owen Graduate School of Management at Vanderbilt University.

05/15 | Fellows is directed by Former U.S. Senate Majority Leader Bill Frist, M.D. (pictured), and Larry Van Horn, health care management and economics professor at the Owen Graduate School of Management at Vanderbilt University.

05/15 | LHC assembles events year-round, allowing members to discuss current health care issues with leading decision makers. Pictured: Anne Filipic, president, Enroll America, speaks at LHC’s annual delegation to Washington, D.C.

03/14 | The Nashville Health Care Council’s board of directors is made up of world-class health care executives like Milton Johnson, chairman and CEO, HCA, and Dee Anna Smith, CEO, Sarab Cannon.

THE COUNCIL FELLOWS INITIATIVE

In 2015, Nashville Health Care Council Fellows, an annual initiative to engage, educate and foster leadership among those who will carry the health care industry forward, completed its third class. Thirty-six senior executives met for eight daylong sessions to explore new solutions that meet the challenges facing the U.S. health care system in years ahead.

LEADERSHIP HEALTH CARE

Leadership Health Care (LHC) is a Council initiative to foster the next generation of health care leaders by creating educational and networking opportunities for members. With 1,000 individual members, LHC is the foremost organization for emerging leaders in the field.