



2019-2020

ANNUAL REPORT

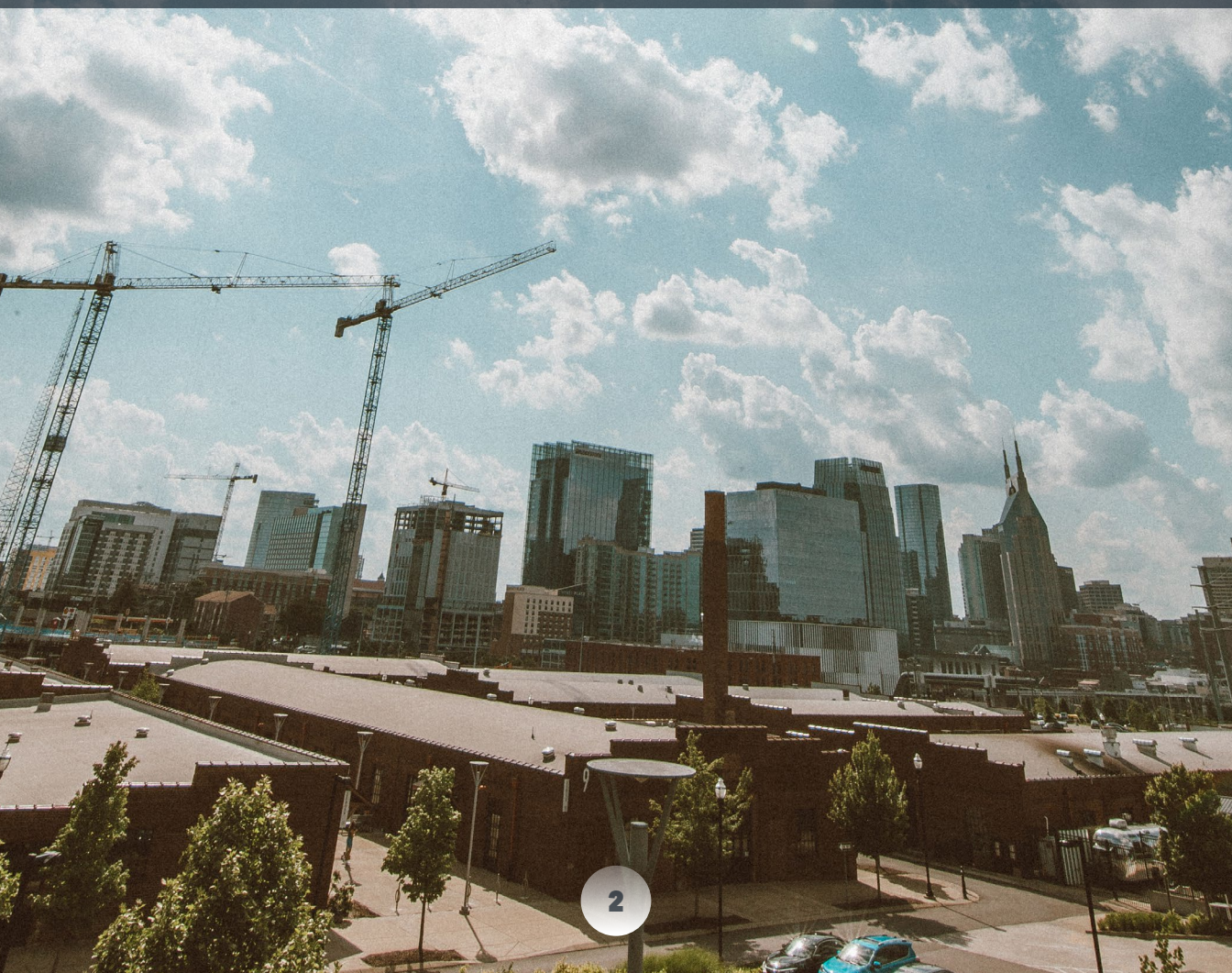
STRONGER. TOGETHER.



OUR PURPOSE:

TO CREATE ECONOMIC PROSPERITY BY FACILITATING COMMUNITY LEADERSHIP

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.



2019-2020

THANK YOU TO OUR SPONSORS

PIVOTAL PARTNERS



FRIENDS OF THE CHAMBER



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- Damon Hininger**, President & CEO, CoreCivic
- Chris Holmes**, President & CEO, FirstBank
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- Decosta Jenkins**, President & CEO, Nashville Electric Service
- Milton Johnson**, Retired Chairman & CEO, HCA Healthcare
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- Brad Southern**, Chairman & CEO, LP Building Solutions
- Flora Tydings**, Chancellor, Tennessee Board of Regents
- Barry Vandevier**, Chief Operating Officer, Asurion
- Dave Walton**, Vice President, Caterpillar Inc. and President & CEO, Caterpillar Financial Services Corporation
- Sally Williams**, President of Nashville Music & Business Strategy, Live Nation Entertainment
- Kate Wood**, Founder & President, K8 Co



The strength of our economy has given us an advantage when faced with a global pandemic and economic downturn. Our diverse economy and strong job creation track record have helped position us for economic restoration and a faster recovery.

We continued to see growth and interest in the past year, despite the interruption of the pandemic.

The Chamber has 2,000 member companies and gained 244 new members and 16 new Partnership investors in 2019-2020. Our members enable us to deliver on our purpose.

As a Chamber member, your contributions to our region set Nashville apart. Business and community leaders like you play a vital role in leveraging opportunities and providing leadership to advance our region and provide more of our neighbors a chance to share in the region's prosperity.

Our region has experienced tremendous growth. This year, we welcomed 29 new company relocations and 35 corporate expansions creating over 5,700 new jobs in the region. We know that growth and opportunity come from strategic decisions along the way. Your involvement and leadership are at the heart of this region's momentum.

As we move into the next year, we have much work to do, but we're encouraged by the resilient spirit of our region. We can be assured that we'll continue to grow and prosper for generations to come.

Ralph Schulz
President and CEO
Nashville Area Chamber
of Commerce

Robert A. McCabe, Jr.
2019-2020 Nashville Area
Chamber of Commerce
Board Chair
Chairman, Pinnacle
Financial Partners



IMPACT

As our highest-level investors, Impact members recognize the relationship between the prosperity of the region and the success of their own businesses. Their investment supports influential advocacy initiatives that protect the business environment. Members at our Impact level value the Chamber's influence and view regional collaboration and growth as a key priority to achieving their firms' business objectives.

IMPACT MEMBERS

Bank of America
Bridgestone Americas, Inc.
Butler | Snow
Dollar General Corporation
Fifth Third Bank
Gaylord Opryland Resort & Convention Center
HCA Healthcare
Ingram Industries Inc.
LifeWay Christian Resources
Metropolitan Government of Nashville & Davidson County
Metropolitan Nashville Airport Authority
Nashville Electric Service
Nissan North America, Inc.
Regions Bank
Ryman Hospitality Properties
Tennessean | LOCALiQ
TriStar Health
Truist
Uppercut Box Company
Walmart Stores, Inc.



PROSPER

With your community-minded focus and growth goals in mind, the Chamber offers opportunities to foster prosperity throughout the region. Our Prosper members broaden their reach and gain strength through meaningful collaboration with their peers. Members at our Prosper level value large-scale regional influence and collaboration with other influencers across the region.

PROSPER MEMBERS

Amazon	Southwest Airlines
Ascension Saint Thomas	Southwestern Family of Companies
Bass, Berry & Sims PLC	Summit Constructors, Inc.
Berry Global, Inc.	T-Mobile
BKD CPAs & Advisors	TVV Capital
Caterpillar Financial	U.S. Bank N.A.
Services Corporation	UBS Financial Services, Inc.
Claritas Capital	United Rentals
First Horizon	Vanderbilt University
Google	Verizon
Google Fiber	Waller
Grand Hyatt Nashville Hotel	Wells Fargo Commercial Banking
Jackson National Life	
Insurance Company	
JW Marriott Nashville	
KeepTruckin	
Nashville Convention & Visitors Corp.	
OUTFRONT media	
Pinnacle Financial Partners	
SmileDirectClub	



LEAD

At the Lead level, our members collaborate with other influencers in the region. These members value large-scale regional leadership opportunities and view their community leadership as a major extension of their brand.

LEAD MEMBERS

3P America

American Blue Ribbon Holdings

Asurion

AT&T

Belmont University

Bradley

Cambria Downtown Nashville

Carlex Glass America, LLC

City Enterprises

Comcast

Cracker Barrel Old Country Store

Crawford Custom Consulting

Crown Castle

Cushman & Wakefield

Deloitte LLP

F&M Bank

Frost Brown Todd LLC

Genesco Inc.

Gino's East & The Comedy Bar

Gresham Smith

Hankook Tire

HIPPIE Radio 94.5

Humana

ICON Entertainment Group

**icon Mechanical Construction &
Engineering, LLC**

Kroger

Lendlease (US) Public Partnerships LLC

Lipscomb University

Mars Petcare

**Matthew Walker Comprehensive
Health Center**

Middle Tennessee State University

Pepsi Bottling Co.

Permobil

Piedmont Natural Gas

PNC Bank

PwC

Randstad USA

Raphah Institute

Renaissance Nashville Hotel

Sam's Club - Regional Office

Topgolf Nashville

Tractor Supply Co.

**U.S. Smokeless Tobacco Co.
(an Altria Company)**

Ultimate Air Shuttle - Cincinnati

Willis Towers Watson Southeast, Inc.

ENGAGE

The Chamber sets the stage for Engage members to share their voices as part of Middle Tennessee's business community. In this role, our members gain greater visibility and expand their market through increased access to area leaders. Members at our Engage level value a "seat at the table" and being part of the conversation shaping our city.

ENGAGE MEMBERS

4Patriots, LLC
7 Springs Orthopedics
A. Ray Hospitality
A.O. Smith Corporation
Adams and Reese LLP
Advance Financial
Adventure Science Center
Agile Ticketing Solutions
Ajax Turner
AKIVA SCHOOL
Alignment Nashville
AllianceBernstein
Allstate Insurance Company
American Constructors
Anesthesia Medical Group, PC
Ankura Consulting Group
Apex Revenue Technologies
Ardent Health Services
Armor Concepts LLC
Arroyo Consulting
Artisan Custom Closets
Austin Peay State University
Automated Health Systems
Avaya
Avison Young - Tennessee, Inc.
B.L. Harbert International
Baker Donelson
BAM! Social Business, LLC
Bank of Tennessee
Barge Design Solutions, Inc.
Bavarian Bierhaus
Baylor Company
BDO USA, LLP
BEDROC
Bell & Associates Construction, L.P.
BentoLiving Chestnut Hill
Bernhard
Big Machine Vodka
BlueCross BlueShield of Tennessee, Inc.
Boy Scouts of America
Brentwood Academy
Brian Taylor, Broker - BenchMark
Commercial Realty
Brookfield Properties
Brookside Properties, Inc.
Buckeye Partners/Titan Partners
Buckingham Companies
Burr & Forman LLP
C Spire Business
C.B. Ragland Company
C4 Operations Background Check Services
Calvert Street Group
Capital City Construction
Catalyst Collective
Center for Medical Interoperability
Center for Nonprofit Management
Centerstone
CGS Administrators, LLC
Change Healthcare
Choice Food Group, Inc.
Cigna HealthSpring
City Tap
City Winery
CityInk Company
Clark Construction Group, LLC
CMT
Coca-Cola Bottling Co.
College of Business at
Austin Peay State University
Colliers International
Commerce Bank
Commonwealth Commercial Partners
TN, LLC
Community Health Systems

Comprehensive Security Inc.
 Contour Aviation
 Convene
 CoreCivic
 Council Capital
 Covert Results
 Crescent Communities, LLC
 CrossMediaPartners
 Cushion Employer Services Corporation
 CycleBar The Gulch
 Dean Foods Company
 DECA Inc
 Delek US Holdings, Inc.
 Dell Nashville
 DET Distributing Company
 DevMar Products
 Don Kennedy Roofing Company
 DoubleTree by Hilton
 Nashville - Downtown
 duGard Communications
 DVL Seigenthaler/FINN Partners
 Dynamic Lifecycle Innovations
 E&D Enterprise, LLC
 eCard Systems
 ECS Southeast, LLP
 Elliott Davis, LLC
 Embraer Aircraft Maintenance
 Services, Inc.
 Emma Email Marketing
 Ensworth School
 Enterprise Solutions
 Envision Healthcare
 EOA Architects PLLC
 ESa
 event logistics, inc.
 Evolution Event Solutions
 Executive Aura
 EY
 Faith Technologies
 Father Ryan High School
 Fayette Janitorial Services, LLC
 FedEx Ground
 FedEx Office
 Ferguson Enterprises, Inc.
 Fiber Solutions
 FIDELITONE
 Findley
 First South Financial Credit Union
 FirstBank
 Flexential
 Flying Axes
 FocusWorks Consulting Group, LLC
 Foundry Commercial
 FoxFuel Creative

Fraport Tennessee
 Freeland Chevrolet Superstore
 FW Publishing
 Gallagher Benefit Services
 Genesis Protective Services
 GEODIS | Contract Logistics
 Gibson Brands Inc.
 Goodwill Industries of Middle TN, Inc.
 Goodwyn, Mills and Cawood
 Gould Turner Group
 Graduate Nashville
 Gray Line of Tennessee
 Greater Nashville Regional Council
 Groups360
 Grove Group
 Habitat for Humanity of Greater Nashville
 Harmony Medical Solutions
 HarperCollins Christian Publishing
 HASTINGS
 Hawkins Partners
 Healthcare Bluebook
 HealthStream, Inc.
 Hemphill Brothers Coach Company
 Hilton Nashville Downtown
 HNTB Corporation
 Holiday Inn Express & Suites Nashville
 Southeast - Antioch
 Horton Group
 Hotel Preston
 HUB International Insurance Services
 Hughston Clinic Orthopaedics
 Hull's Environmental Services
 Hutton Hotel
 I.C. Thomasson Associates, Inc.
 IES - Ingram Express Services
 Infinity Hospitality Group
 InfoWorks, Inc.
 Inked Beauty
 Jack Daniel Distillery
 Janna Landry
 JetRight Aerospace Holdings
 Jimmy John's
 Jody Lentz
 Joe C. Davis Foundation
 Johnson Controls Security Solutions
 JSM Associates, LLC
 Juicy Seafood
 KFC
 KGV Studios
 Kimley-Horn and Associates Inc
 knowledgeBANK
 KPMG LLP
 KraftCPAs PLLC
 Kuehne + Nagel

La Quinta Inn and Suites
 Goodlettsville - Nashville
 Las Palmas Mexican Restaurants
 Law Office of Tara A. Davis
 LBMC & Affiliates
 Lee Company
 Lexus | Cool Springs
 LHP Management, LLC
 Life Promotions Installing Hope in Youth
 LifePoint Health
 LifeStorage
 Lifest 2021 - A Party With a Purpose -
 Bon Aqua July 29-31
 Lightning 100
 Liquor Lab Nashville, LLC
 Lithographics, Inc.
 LKQ Corp.
 Loews Vanderbilt Hotel
 Louisiana-Pacific Corporation
 Lumina Foods, LLC
 Lyon Koncession, LLC
 M3 Technology Group
 Macy's
 Maggiano's Little Italy
 Margaritaville Nashville Hotel
 MarkKraft Cabinets
 MARQ Labs
 Meharry Medical College
 Mercedes-Benz of Music City
 Messer Construction Company
 MF Restaurant Group
 Millennium Maxwell House Hotel
 MODA Image and Brand Consulting
 ModusLink
 Moody Nolan, Inc.
 Morph Hospitality
 MP&F Strategic Communications
 Mrs. Grissom's Salads, Inc.
 Music City Baseball
 Nashville Airport Marriott Hotel
 Nashville Civic Design Center
 Nashville Downtown Partnership
 Nashville Entrepreneur Center
 Nashville Marriott at Vanderbilt University
 Nashville Soccer Club
 Nashville Sports Council
 Nashville State Community College
 Nashville Underground
 Nashville Veterinary
 Specialists + Animal Emergency
 Nashville Yards
 Neely Coble Company
 Nelson Mullins Riley & Scarborough, LLP
 NewsChannel 5 Network-WTVF

Northwestern Mutual
 NSG
 Ole Smoky Moonshine Distillery
 Omega Hotel Group
 Omega Recycling Solutions
 oneC1TY
 OZ Arts Nashville
 Page Resource Group
 Philips North America
 Pillsbury Winthrop Shaw Pittman LLP
 Platinum Rule Advisors
 Polsinelli PC
 Powerplay Studios
 Premier Parking of Tennessee, LLC
 Preserve at Highland Ridge
 ProScout
 PSC Metals, Inc.
 PYA
 Quality Industries
 Quovant
 R.H. Boyd Publishing Corporation
 Ragan-Smith Associates, Inc.
 Rainforest Café - Opry Mills
 Reed Public Relations
 Reliant Bank
 Renewal House
 Republic Services
 Reynolds & Reynolds Facility Services, Inc.
 Richland Country Club
 RJ Young
 Robertson County Chamber of Commerce
 Rogers Group, Inc.
 RSM US LLP
 Rutherford County Chamber of Commerce
 S&ME, Inc.
 S+H Group
 Sarah Cannon
 Schneider Electric
 Second Harvest Food Bank
 of Middle Tennessee
 Seneca Group
 ServiceMaster Facilities Maintenance
 ServiceSource
 Showpiece Solutions LLC
 Simmons Bank
 Sinclair Broadcasting Group
 - Fox17/CW58/MyTv30
 Sitel
 siY, LLC
 Skanska USA Building Inc.
 Skilled Workforce
 Sleep Number
 Slim & Husky's
 Smith Gee Studio, LLC

SMS Holdings Corporation
Soles4Souls
South College Nashville
Southeast Financial Credit Union
SpecialtyCare
Spin Scooters
Sprintz Furniture Showroom
SSR
Stansell Electric Company, Inc.
State of Tennessee -
Department of Human Services
STG Design
Stites & Harbison, PLLC
Stones River Group
Strategic Hospitality
Strategy and Leadership LLC
Studio Bank
Sunrise Contracting, Inc.
Sunrise Promotions
Synovus Bank
Sysco Nashville, LLC
T.W. Frierson Contractor, Inc.
TECT Aerospace
Tennesseans for Student Success
Tennessee Air National Guard
- 118th Wing, Berry Field
Tennessee Department
of Human Resources
Tennessee Education Association
Tennessee Minority Pages
Tennessee State University
Tennessee Valley Authority
Tessler Construction Company, Inc.
The Bradford Group
The Buntin Group
The Comfort Group
The Creighton Company, LLC
The Hermitage Hotel
The Jack C. Massey College of Business
- Belmont University
The Mathews Company
The Memorial Foundation, Inc.
The Roman Catholic Diocese of Nashville
The UPS Store at Belmont University
The Ville Branding / The Ville Merch
The Westin Nashville
ThinkThru
Thomas & Hutton
Thompson Machinery
Commerce Corporation
Thompson Nashville
TN Human Rights Commission
TomKats Hospitality
Total Group LLC

Tracy Guarino
Trauger & Tuke
Trevecca Nazarene University
Tri Star Energy
TRICOR
TTL, Inc.
Turner Construction Company
U.S. Army Recruiting Battalion
Union Station Hotel
United Methodist Publishing House
United Way of Greater Nashville
UnitedHealthcare
Universal Capacity Solutions
Universal Lighting Technologies
Vanderbilt University - Owen Graduate
School of Management
Vanderbilt University Medical Center
Vector Management
VF Imagewear
Virgin Hotels Nashville
Visionary Results, LLC
Warby Parker
Warner Music Group
Western Governors University
WIRTGEN AMERICA, Inc.
WKRN-TV, Channel 2 / ABC
Wood Environment & Infrastructure
Solutions, Inc.
Worthington Advisory
WSMV-TV Channel 4 Nashville
WSP
Wyatt, Tarrant & Combs, LLP
Yazoo Brewing Company
YMCA of Middle Tennessee
YMG Coaching & Consulting
YouScience
ZYCRON, A Division of BG Staffing, Inc.

ECONOMIC DEVELOPMENT

The Nashville Chamber economic development team continues to position the Nashville region as a top location for business expansions and relocations. Having hosted delegations from around the world and traveling to cities across the country, the economic development team works with industry influencers to promote Nashville as a great place to do business. Nashville has been ranked as a top ten metro in the U.S. for job growth eight years in a row. Nashville was also ranked the #1 Metro for Economic Strength in 2019 by *Policom*. At the beginning of 2020, the *Wall Street Journal* named Nashville the 2nd hottest job market in the country.

ECONOMIC DEVELOPMENT REGIONAL PARTNERS

The success of Partnership 2020 is due in large part to the collaboration between the Nashville Chamber and regional economic development partners, government and chamber organizations throughout the 10-county economic market.

SAM HAZEN

CHIEF EXECUTIVE OFFICER, HCA HEALTHCARE



“Nashville has long been known for its collaborative and entrepreneurial spirit, and in recent years, the city has gained a national reputation for cutting-edge technology and innovation.

As a result, established healthcare companies like HCA Healthcare- along with startups and professional partnerships- are moving industry forward and improving patient care not just here but everywhere.”

These regional organizations work together to continue our region's economic prosperity:

Cheatham County Economic and Community Development

City of Gallatin Economic Development Agency

City of Goodlettsville

City of Hendersonville

City of Portland

Clarksville-Montgomery County Economic Development Council

Dickson County Economic Development Alliance

Forward Sumner Economic Partnership

Greater Nashville Regional Council

Joint Economic and Community Development of Wilson County

Maury County Chamber and Economic Alliance

Metropolitan Government of Nashville and Davidson County

Middle Tennessee Industrial Development Association

Robertson County Economic Development Board

Rutherford County Chamber of Commerce

State of Tennessee Department of Economic and Community Development

Tennessee Valley Authority

Williamson, Inc.

JOB & INVESTMENT SCORECARD

64
TOTAL
ANNOUNCEMENTS

35
EXPANSIONS

29
RELOCATIONS

JOBS

5,737 NEW JOBS

3,594 FROM EXPANSIONS

2,143 FROM RELOCATIONS

CAPITAL INVESTMENT

\$442,362,776 CAPITAL INVESTMENT

\$263,816,133 FROM EXPANSIONS

\$178,546,643 FROM RELOCATIONS

SQUARE FEET

1,981,234 SQUARE FEET

1,312,580 FROM EXPANSIONS

668,654 FROM RELOCATIONS

EXPANSIONS

Accenture*	Davidson
Agero	Montgomery
Airtech Advanced Materials	Robertson
AllianceBernstein	Davidson
Asurion	Davidson
Athena-SCE, Inc.*	Maury
Baker Donelson	Davidson
Bison Countertops Inc.	Cheatham
Built Technologies	Davidson
Celero Commerce LLC	Williamson
Citizens Bank	Davidson
Concord Music Group	Davidson
Crestmark Bank	Williamson
Enexor BioEnergy LLC	Williamson
FirstBank	Davidson
Genesco, Inc.	Davidson
Gibson Brands, Inc.	Davidson
Guaranty Home Mortgage Corp.	Davidson
Hub International Ltd.	Davidson
Hunter Fan Company	Rutherford
LBMC & Affiliates	Williamson
Live Media Group Holdings	Davidson
Napa Auto Parts	Wilson
naviHealth	Williamson
Ramsey Solutions	Williamson
Red Collar Pet Foods	Williamson
Reliant Bank	Montgomery
Robert W. Baird	Davidson
Staffing as a Mission	Davidson
SteelSummit Holdings	Rutherford
Stevens Aerospace and Defense Systems	Rutherford
Sumitomo Wiring System*	Rutherford
Topre America Corp.*	Rutherford
Vaughn Manufacturing	Cheatham
Xsolis	Davidson

* Foreign Direct Investment

RELOCATIONS

Allegiant Travel Company	Davidson
Briye	Davidson
Central Research Inc.	Sumner
Choate Construction Co.	Davidson
Cintas Corporation	Rutherford
Cleerkut Inc.	Davidson
CloudOne	Davidson
Composite One	Wilson
Cryoport Inc.	Williamson
Fisher Phillips	Davidson
Global Shares*	Davidson
iHeartRadio	Davidson
Ketner Group Communications	Davidson
Live Oak Bancshares	Davidson
Maynard Cooper & Gale	Davidson
Mechanical Licencing Co	Davidson
Mersen*	Maury
Mid Atlantic Roofing Supply (MARS)	Sumner
MSouth Partners	Williamson
Parker Marine	Cheatham
QTC	Davidson
Saltworks Security	Rutherford
Shore Capital Partners	Davidson
SiLo	Davidson
Spirit Airlines	Williamson
TECT Aerospace	Davidson
Thnks	Williamson
UDig	Williamson
VK Integrated Systems	Montgomery

* Foreign Direct Investment

2019-2020 HIGHLIGHTS

Agero

Driver assistance services company, Agero, announced plans to expand its operations in Clarksville. The expansion will include **\$2 million** in capital investment and **900 jobs** in Clarksville over the next five years. Moreover, Agero has expanded its operations by nearly **14,000 square feet**.

Cintas Corporation

Cintas Corporation announced the opening of a regional operations center in Murfreesboro. Cintas is a leading provider in specialized services, such as uniforms, supplies and safety materials. The new facility will be located at the West Point Development in Murfreesboro and will house management and production teams. Cintas is expected to produce **\$20 million** in capital investment and provide **144 new jobs**.

iHeartMedia

iHeartMedia announced that it has selected Nashville as the location for iHeartRadio's second digital headquarters, further expanding its current New York-based digital team. Since it launched as an all-in-one digital service in 2011, iHeartRadio has grown to become the country's No. 1 streaming broadcast radio platform. It currently has **858 broadcast stations** nationwide in **150 markets**. The company has also expanded internationally with licensed partners in Mexico, Canada, Australia and New Zealand.

Mersen

Headquartered in France, Mersen is a global leader in electrical power and advanced manufacturing. Mersen designs innovative solutions that enable clients to optimize their manufacturing performance. Mersen announced the establishment of manufacturing operations in Columbia. Beginning operations in late 2020, Mersen will invest up to **\$65 million** and create approximately **100 jobs**.

QTC

QTC announced the opening of an operations center in Nashville. The announcement includes **\$5 million** in capital investment and **410 new jobs** in Davidson County. QTC is a subsidiary of Leidos Holdings, Inc. and provides disability and occupational health examination services for veterans, federal employees and the commercial industry.

Genesco Inc.

Genesco Inc., founded in Nashville in 1924, is a retailer and wholesaler of footwear, apparel and accessories. Genesco announced plans to relocate and expand its Nashville headquarters. Genesco will create **60 new jobs** in Davidson County and invest **\$31 million** over the next five years. Genesco's new location will be 535 Marriot Dr., where it is expected to occupy two-thirds of the existing 310,000 square foot facility.

Global Shares

Global Shares is a fast-growing Irish financial services technology software company. The company has offices in 15 cities around the globe. The company announced an opening of a Nashville office that will contribute **200 jobs** to the local economy.

NAPA Auto Parts

NAPA Auto Parts- Genuine Parts Company announced a distribution center in Wilson County. GPC specializes in the distribution of automotive parts and accessories. The opening will include **150 new jobs** in Wilson County, **\$48 million** in capital investment and **330,000 square feet** of space.

Ramsey Solutions

Ramsey Solutions announced that it will expand its headquarters in Williamson County. Ramsey Solutions will invest **\$52 million** and create an additional **600 jobs** in Franklin. The expansion includes the construction of a second office building in the Berry Farms development that will measure approximately **192,000 square feet**.



INTERNATIONAL BUSINESS

In an ever-complex global marketplace, consuls generals, ambassadors and senior trade officials put Nashville at the top of the list for visits and conversations with business leaders. Delegations from China, Cambodia and the United Kingdom traveled to Nashville to learn more about the region's dynamic business climate.

2019-2020 IBC ADVISORY BOARD LEADERSHIP:

CHAIR

CHRIS HILLS - WILLIS TOWERS WATSON

VICE CHAIR

ELIZABETH RANDALL WINKLE - STR, INC.

IMMEDIATE PAST CHAIR

MIKE FEDELE - MITSUI & CO. (U.S.A.), INC.

EXECUTIVE COMMITTEE

LISA FERRELLI - BANK OF AMERICA

MIKE MCCOOEY - ASURION

The International Business Council Advisory Board is comprised of a cross section of the region's international business leaders. These volunteers serve as advisors and advocates for international businesses operating in or considering investing in Middle Tennessee.

CONSULATES AND TRADE OFFICIALS VISITING THE NASHVILLE REGION IN 2019-2020

Canada
European Union
Finland
France
Ireland

Japan
London
Northern Ireland
China
Poland

South Korea
Netherlands
United Kingdom

INBOUND DELEGATIONS

★ Basildon, England

★ Edmonton, Canada

VISITS PLANNED BUT IMPACTED BY COVID-19

★ Lord Mayor of Belfast, Northern Ireland

★ Irish Ambassador to the US, Daniel Mulhall

★ Japanese Business Federation, Keidanren

HIGH LEVEL VISITS

★ Ambassador Chris Hill

★ US Ambassador to the Republic of Korea, Harry Harris

★ Irish Minister of Business, Enterprise and Innovation, Heather Humphreys

★ Embassy of the People's Republic of China to the US, Minister Xu Xueyuan

★ French Ambassador to the US, Phillipe Etienne

PARTNERSHIP

Founded in 1990, Partnership 2020 is the Nashville region's public/private economic development initiative responsible for the creation of jobs and capital investments, talent development and enhanced quality of life.

Nearly 250 Nashville Chamber members have made an additional investment in the Chamber to support Partnership 2020's strategic priorities.

Since 1990, the Nashville Chamber's Partnership 2020 initiative has been the economic development strategy for the Nashville region. The Nashville region has seen tremendous success through the 30-year initiative with a more diverse economy, an increased per capita income and significant job growth.



In 1990, a group of visionary leaders recognized the Nashville region lacked a strategic economic development plan for its future. These leaders came together to create the economic development powerhouse, Partnership 2000. Today the Partnership has evolved into nearly 250 organizations invested in the Nashville region's economic vitality, talent and livability.

Because of the leadership and vision of Partnership investors, the Nashville region is continually recognized as a top destination for corporate investment, entrepreneurship and talent. Over the past 30 years, the Partnership has supported the creation of more than 520,000 jobs in Middle Tennessee and has played an important role in many regional successes, including relocations and expansions of global leaders such as Amazon, Bridgestone Americas, Asurion, Google, Louisiana-Pacific, Nissan North America, UBS, AllianceBernstein and many more.

While our region remains successful in attracting new businesses and growing existing businesses, the competition for quality, high-paying jobs and skilled talent is more intense than ever. At the same time, we are addressing the economic impacts of a global pandemic. As regional leaders, innovators and risk-takers, Partnership investors stand up to these challenges and are ready to continue moving the region's momentum forward. I am proud to work alongside my fellow Partnership investors to plan the new regional economic development strategy.

Our Partnership investors are crucial to the region's continued growth and success. As we look ahead, we will need the support of our Partnership investors more than ever. Thank you for your leadership, vision and support.

Sincerely,

C. Wright Pinson, MBA, M.D.
Deputy CEO, Chief Health System Officer
Vanderbilt University Medical Center
Chair, Partnership

PARTNERSHIP PROGRESS REPORT

	2016 BASELINE YEAR	2018-2019 ONE YEAR NET CHANGE
EMPLOYMENT GROWTH	973,025	+43,303
% OF ADULTS WITH A COLLEGE DEGREE	41.9%	-1.1%
GROSS DOMESTIC PRODUCT	\$115.3 B	+\$7.8 B
NET MIGRATION	25,358	+21,125
MEDIAN HOUSEHOLD INCOME	\$61,522	+\$1,452
	2016 -2021 FIVE-YEAR GOAL	PERCENT OF FIVE-YEAR GOAL ACHIEVED
EMPLOYMENT GROWTH	+100,000	129.3% <div><div></div></div>
% OF ADULTS WITH A COLLEGE DEGREE	49%	90.0% <div><div></div></div>
GROSS DOMESTIC PRODUCT	\$144.1 B	94.4% <div><div></div></div>
NET MIGRATION	+ 100,000	94.2% <div><div></div></div>
MEDIAN HOUSEHOLD INCOME	\$68,000	98.9% <div><div></div></div>

PARTNERSHIP INVESTOR COMPANIES

PLATINUM INVESTORS

Ascension Saint Thomas
Community Health Systems
First Horizon Foundation
HCA Healthcare
Ingram Industries Inc.
Lawrence Gateway
LifePoint Health
Metropolitan Government
of Nashville & Davidson County

Nashville Electric Service
Pinnacle Financial Partners
Regions Bank
Tennessee Valley Authority
Truist Bank
Vanderbilt University
Vanderbilt University Medical Center

GOLD INVESTORS

AllianceBernstein
Amazon
Asurion
Baker Donelson
Bank of America
Barge Design Solutions, Inc.
Bass, Berry & Sims PLC
Belmont University
BKD CPAs & Advisors
Bradley
Bridgestone Americas, Inc.
Butler | Snow
CapStar Bank
Caterpillar Financial Services Corporation
CBRE
CoreCivic
Country Music Association Inc.
Cushman & Wakefield
Delek US Holdings, Inc.
Deloitte LLP
Delta Dental of Tennessee
Envision Healthcare
ESa
EY
Fifth Third Bank
FirstBank
Frost Brown Todd LLC
Gaylord Opryland Resort
& Convention Center

Genesco Inc.
Gresham Smith
James Stephen Turner Family Foundation
KPMG LLP
LBMC & Affiliates
Louisiana-Pacific Corporation
Mars Petcare U.S.
Metropolitan Nashville Airport Authority
Nashville Predators
Office Resources, Inc. (ORI)
Philips North America
Piedmont Natural Gas
PNC Bank
Polsinelli PC
PwC
Renasant Bank
Ryman Hospitality Properties
SpecialtyCare
Synovus Bank
Tennessean | LOCALiQ
Tennessee Titans
The Memorial Foundation, Inc.
UBS
U.S. Smokeless Tobacco Co., LLC
(an Altria Company)
Waller
Wells Fargo

SILVER INVESTORS

Atiba
Avison Young - Tennessee, Inc.
Bell and Associates Construction, L.P.
British Airways
Cheekwood Estate & Gardens
Comcast Cable Communications, Inc.
Crain Construction
Dell Nashville
DET Distributing Company
DPR Construction

Google Fiber
Highwoods Properties
Lipscomb University
Rogers Group, Inc.
Stites & Harbison, PLLC
Turner Construction Company
U.S. Bank N.A.
Vanderbilt University Executive Education

BRONZE INVESTORS

A. Marshall Hospitality
Adams and Reese LLP
Ajax Turner Company
Albany Road Real Estate Partners
Alfred Williams & Co.
American Constructors, Inc.
Amerigroup Tennessee, Inc.
Ankura Consulting Group
Armstrong Relocation
Ascend Federal Credit Union
Austin Peay State University
Bank of Tennessee
Batch Nashville
BDO USA, LLP
Berkshire Hathaway Home Services
Woodmont Realty
Bernhard
Big Visual Group
BlueCross BlueShield of Tennessee, Inc.
Boyle Nashville, LLC
Brasfield & Gorrie, LLC
Building Ideas | Marcelle Guilbeau
Interior Design
Burr & Forman LLP
Carter Group, LLC
C.B. Ragland Company
CBI | Workplace Solutions
Centric Architecture
Charles Hawkins Co.
Cheatham County Joint Economic &
Community Development Board
Choice Food Group
City of Gallatin Economic
Development Agency
City of Goodlettsville, ECD
City of Hendersonville
Civil Site Design Group, PLLC

Clarksville-Montgomery County
Economic Development Council
CMT
Colliers Nashville
Concept Technology, Inc.
Conexión Américas
Crosslin
Cummins Station/DZL Management Co.
Dickson County Economic
Development Alliance
Digital Group, LLC
DVL Seigenthaler/FINN Partners
DWC Construction Company, Inc.
Eakin Partners, LLC
Elevation Search Solutions
Elmington Capital Group
emids
Enterprise Holdings
Findley
Forward Sumner Economic Partnership
Fourth Capital
Fridrich & Clark Realty, LLC
Gallagher
Geodis Logistics, LLC
GHP, Inc.
Goodwyn | Mills | Cawood
Gould Turner Group
Greater Nashville REALTORS ®
Greater Nashville Regional Council
Green & Little, LP
Gullett Sanford Robinson & Martin, PLLC
Hall Emery | Brookfield Properties
Hastings Architecture Associates, LLC
HDR
Hire Dynamics
Holladay Properties
HSBC Bank US

BRONZE INVESTORS

HST Interior Elements
Hutton Hotel
IDR
IRIS Networks, LLC
Jack B. Turner and Associates
Jackson National Life Insurance
JetRight
JLL
Joint Economic & Community
Development Board of Wilson County
Journal Communications, Inc.
JPMorgan Chase & Co.
KraftCPAs, PLLC
Lee Company
LifeWay Christian Resources
LKQ Corporation
Lose Design
Lovell Communications, Inc.
Maury County Chamber
& Economic Alliance
Mayer Electric Supply
Messer Construction
Middle Tennessee State University,
Jones College of Business
Mitsui & Co. (U.S.A.), Inc.
MP&F Strategic Communications
Nashville Business Journal
Nashville LGBT Chamber of Commerce
Nashville Soccer Club
Nashville State Community College
Nashville Yards
Nelson Mullins Riley & Scarborough LLP
Nissan North America Inc.
NOW Leasing, LLC
Ogletree, Deakins, Nash, Smoak
& Stewart, P.C.
Omni Nashville Hotel
oneC1TY Nashville
Onora Group
Pathway Lending
Quanta Manufacturing Nashville
R.C. Mathews Contractor |
The Mathews Company
Randstad USA
RE/MAX Homes And Estates:
Lipman Group
Renaissance Nashville Hotel
Robertson County Economic
Development Board
RSM US LLP
Rutherford County Chamber of Commerce
Savills

Second Harvest Food Bank
of Middle Tennessee
ServiceSource
Sherrard Roe Voigt and Harbison, PLC
Skanska USA Building, Inc.
Smith Seckman Reid, Inc.
Snapshot Interactive
Soles4Souls
Southeast Venture LLC
Southwest Airlines
SpringHill Suites/Residence Inn/AC Hotel
by Marriott Nashville Downtown
SSOE Group
Staffing as a Mission, LLC
STG Design
Synergy Business Environments
T. W. Frierson Contractor, Inc.
Tennessee State University
Terracon
The Ashton Real Estate Group
of RE/MAX Advantage
The Bohan Agency
The Buntin Group
The Frist Foundation
The Wilson Group Real Estate Services
TMPartners, PLLC
Topgolf
Truxton Trust
TTL, Inc.
Tuck Hinton Architects
TVV Capital
United Way of Greater Nashville
Urban League of Middle Tennessee
Vaco
Wesley Financial Group
Western Express
Wieck Construction, LLC
Williamson, Inc.
Wilson Bank & Trust
Wood Personnel Services, Inc.
YMCA of Middle Tennessee
Zeitlin Sotheby's International Realty
Zycron, A Division of BG Staffing, Inc.

PAST PARTNERSHIP CHAIRS

2017 - 2019

WILLIAM F. CARPENTER III

LIFEPOINT HEALTH

2015 - 2017

JIM SCHMITZ

REGIONS BANK

2013 - 2015

MILTON JOHNSON

HCA HEALTHCARE

2010 - 2013

JIM WRIGHT

TRACTOR SUPPLY CO.

2008 - 2010

C. KEITH HERRON

REGIONS BANK

2005 - 2008

JACK O. BOVENDER, JR.

HCA HEALTHCARE

2004 - 2005

TOM BEEMAN

SAINT THOMAS HEALTH SERVICES

2001 - 2004

BETH MOONEY

AMSOUTH BANK

2000 - 2001

MARTY DICKENS

AT&T

1999 - 2000

TERRY LONDON

GAYLORD ENTERTAINMENT COMPANY

1998 - 1999

DOYLE RIPPEE

MORGAN KEEGAN & COMPANY

1997 - 1998

ROBERT A. MCCABE, JR.

PINNACLE FINANCIAL PARTNERS

1996 - 1997

CRAVEN CROWELL

TENNESSEE VALLEY AUTHORITY

1995 - 1996

CLAYTON MCWHORTER

CLAYTON ASSOCIATES, INC.

1994 - 1995

OWEN (BOB) G. SHELL, JR.

BANK OF AMERICA

1993 - 1994

DENNIS C. BOTTORFF

COUNCIL CAPITAL MANAGEMENT

1992 - 1993

RICHARD W. CARDEN

ARTHUR ANDERSEN

1990 - 1992

THOMAS J. SHERRARD

SHERRARD & ROE, PLC

The background image is a composite. The top half shows a hazy, high-angle view of the Nashville skyline with several skyscrapers, including the AT&T Building. The bottom half shows a clear, high-angle view of a large, modern roundabout with multiple lanes and green landscaping. A semi-transparent white box is overlaid on the skyline portion, containing the title and introductory text.

RESEARCH

Original research is a cornerstone of the Nashville Area Chamber's ability to effectively execute our mission. The Chamber's Research Center conducts a wide array of studies on economic, demographic and geographic topics as part of the mission of enhancing and expanding prosperity in the region. The Research Center works with businesses, social institutions, communities and entrepreneurs to help them function better and make strategic decisions which has been especially important during this global pandemic and recession. Fiscal Year 2020 began with new Research Center staff and an ambitious plan of work.

VITAL SIGNS

The Research Center began the year by revamping the Vital Signs 2019 survey to provide greater insight into Middle Tennesseans' lives and opinions with regard to workforce, transportation, infrastructure, solid waste and education. While previous surveys had typically garnered **750 responses** via phone across the 13-county Nashville Metropolitan Statistical Area, the Research Center utilized a multimodal delivery that gathered over **5,000 responses** across the 22-county region that is served by the Greater Nashville Regional Council (which underwrites Vital Signs) with statistically significant sampling in all large counties and at least **150 respondents** from smaller counties. This allowed the Research Center to cross tabulate answers to questions regarding how people in the region work, their benefits and commuting patterns as well as their views on their community, transit, housing, taxation, school systems and infrastructure.



WORKFORCE STUDY

The Research Center partnered with the Northern Middle Tennessee Workforce Alliance to undertake an extensive Workforce Study that incorporated both a target market assessment, an industry opportunities analysis, a workforce assessment and the impacts of automation and AI. Additionally, the Workforce Study incorporates the Chamber's work in deep prosperity by looking at the barriers to work faced by Middle Tennesseans including transportation and housing cost burdens, childcare, and lack of education and certification. As the work began to reach its conclusion in March 2020, COVID-19 struck and changed many aspects of the industry and occupational structures. The study was altered to acknowledge the industry, occupational and infrastructure shifts that resulted from both a supply side and demand side economic shock.

ECONOMIC IMPACT OF MUSIC INDUSTRY ON MUSIC ROW

The Research Center partnered with Metro Nashville-Davidson County Planning Department to develop an economic impact analysis of Music Row and its contribution to the Music Industry. This involved asset mapping and evaluation of music-related businesses on Music Row. This report will be a part of a larger Research Center study on the Music Industry to be released in November 2020. The broader study includes a partnership with Exploration Group LLC and a team of student interns from Nashville, Virginia, North Carolina and Chicago. This work comes at a crucial time for the music industry and its workforce which has been significantly damaged by COVID-19 and remains a significant industry in the Middle Tennessee economy.

BUSINESS CONDITIONS COUNCIL

The Business Conditions Council (BCC) has experienced significant growth and change over the year. The last regularly scheduled BCC meeting was held in the first quarter of 2019. At this meeting, the BCC heard a presentation from Nashville Area Chamber of Commerce CEO Ralph Schulz about the Chamber's work in Deep Prosperity and a presentation giving an economic overview of the region from the Vice President of Research. In April, due to the global and regional circumstances imposed by COVID-19, the BCC moved to weekly meetings offering timely insights into the current economic and business climate during the pandemic. It was in these meetings that Chamber staff received industry updates from BCC members, shared information as it pertained to the economic impact of the March tornado and provided a forecasting model of the economic impact of COVID-19. Additional topics of discussion included small business funding, applying for federal relief aid, and reopening plans. Currently the Business Conditions Council is meeting virtually on the second Tuesday of every month.

RESEARCH WORK ON COVID-19

In response to COVID-19, the Research Center created a model to measure the economic impact of COVID-19 and project when and how the State's economy, Middle Tennessee's economy, as well as individual industries would recover. The model was used by the State of Tennessee's Economic Recovery Group and Metro Nashville-Davidson County government. This model has allowed the Chamber to inform both policy and industry leaders on the expected severity of the COVID recession as well as the expected recovery model.





EDUCATION & TALENT DEVELOPMENT

Members of the Chamber share a vision for the future of Middle Tennessee, and we are working together to support community development, regional transit and improvements in education to ensure our region continues to prosper. Chamber staff convene educational committees, public forums and events that empower members to engage with and advocate on behalf of the issues surrounding PreK - 12 education, postsecondary, young professionals and adult education. Our work ensures that high school graduates, Opportunity Youth, adults and current workers are equipped with the credentials and experience (internships, apprenticeships, etc.) necessary to increase the availability and preparedness of Nashville area talent.

PRE-K-12 EDUCATION

In December 2019, the Chamber released the 28th annual Education Report Card, focused on “Whole City.” Over the course of several months, they spoke with city and district leadership, school administrators, Metro departments, non-profit partners and other stakeholders to better understand how the broader Nashville community can be accountable to the public education system. The committee outlined three recommendations, alongside a corresponding “whole city” commitment:

1. The Mayor’s Office should convene MNPS, Metro departments, the nonprofit sector, business leaders and community stakeholders to craft a 2030 vision and aligned plan for a whole city approach to public education that is informed by an assessment of the needs of the school system and outlines cross-sector collaboration in addressing the gaps in support.

As a whole city, we must elect and hold accountable city and district leaders who make education the top priority.

2. MNPS should provide the community with an aspirational funding amount that reflects what a high-quality education costs in order to guide budgetary conversations and encourage more private-public partnerships.

As a whole city, we must determine what it means to sufficiently fund our public school and find a mechanism to get us there.

3. MNPS should prioritize the reinstatement of a district leader to implement the equity framework that was developed prior to the dissolution of the Office of Equity and Diversity to drive the equity work in Metro Schools.

As a whole city, we must provide for and invest in equitable community investment across the school district.

In 2020, the Chamber in collaboration with MNPS piloted Career Launch, the first pre-apprenticeship program for the Academies of Nashville. This first cohort included nearly 70 9th grade Fellows focused on three career pathways – electrical, culinary and healthcare. Three schools and five business partners participated in this pilot year: Maplewood (Electrical) – Stansell Electric and Empower Electric, McGavock (Culinary) – Gaylord Opryland, Pearl-Cohn (Healthcare) – HCA Healthcare and Meharry Medical College. Business partners have committed to providing Fellows with monthly mentor meetings and additional experiential learning opportunities (e.g., field trips, job shadows) throughout their four years of high school and into their first year of postsecondary.

LEADERSHIP PUBLIC EDUCATION

The Nashville Area Chamber of Commerce launched the inaugural cohort of Leadership Public Education (LPE), a 6-month public education leadership development program empowering individuals with the knowledge and skills to serve in community leadership roles at all levels of Metro Nashville Public Schools (MNPS). Twenty-two participants, known as fellows, learned and discussed the structures, challenges, and opportunities that impact MNPS with experts in public education. Sessions included: public school funding; the MNPS budget process; education policy, law, and equity; roles and responsibilities of the Board of Education and director of schools; teacher and principal talent attraction and retention; and conflict resolution and effective communication. LPE fellows are now actively pursuing a community leadership position, including Academies of Nashville Partnership Council, the Chamber's Education Report Committee, MNPS Board of Education, Metro-Nashville Davidson County boards and commissions, parent-teacher organizations, district-wide advisory councils, nonprofit board of directors and Tennessee State Board of Education.





NASHVILLE RECONNECT

Nashville Reconnect is part of Tennessee Reconnect, an initiative to help adults return to higher education to gain new skills, advance in the workplace, and fulfill lifelong dreams of completing a degree or credential. The legislation makes community colleges and Tennessee Colleges of Applied Technology (TCATs) tuition-free to any adult in Tennessee who wishes to begin or complete a postsecondary degree or credential. Nashville Reconnect focuses on two primary areas: supporting the Nashville Talent Hub work with staff providing neutral navigation and connection to wraparound resources in two Reconnect Cafes located on Nashville campuses at Nashville State and working with employers to leverage Reconnect Grants to build internal and external pipelines of talent. In 2019-20, Nashville Reconnect served **931 Reconnectors**, **563 pre-enrolled** and **368 enrolled**.

NASHVILLE TALENT HUB

Lumina Foundation announced Nashville as one of **17 designated Talent Hubs** in Fall 2017. Communities earned this designation by meeting rigorous standards for creating environments that attract, retain and cultivate talent, particularly students of color, the first in their families to go to college and those from low-income households. The Nashville Talent Hub work is a partnership of the Nashville Area Chamber of Commerce, Metro Nashville, Nashville State Community College and TCAT Nashville. This work brings together community-based organizations, churches, employers and government agencies to align programs and services to increase college enrollment, persistence and success. The Nashville Talent Hub trained **160 people** across churches, community-based organizations and employers to serve as a link to Reconnect Navigation services and as supports for adults completing degrees and credentials across the Nashville Promise Zone.

INFORMATION TECHNOLOGY

On May 8, 2019, the Chamber announced the launch of a two-year project with support from JPMorgan Chase focused on building competency-based education (CBE) courses aimed at advancing adults toward careers in information technology. Competency based education offers students flexibility in an online environment to complete a degree or credential at their own pace. The format is especially helpful for working students seeking to change or advance in their careers, for adults with childcare, transportation or other barriers to attending classes in a traditional on-campus format. JPMorgan Chase Foundation is funding the development of Competency Based IT Education at two area community colleges. Nashville State and Columbia State Community Colleges will offer four Computer Programming courses in Spring of 2021 and by Fall of 2021 will have a complete Computer Programming Credential available in the CBE format. Courses will be marketed to adults living in Nashville's Promise Zone through the Talent Hub with the goal of increasing the number of Black residents in IT careers. The project will provide opportunities to engage business leaders to confirm the skills and competencies prospective new hires need to master and offer work-and-learn opportunities for current and prospective employees.

ADVOCACY FOR MIDDLE SKILLS

National Skills Coalition awarded grant funds to build a statewide coalition to create Tennessee Chapters of Business Leaders United (BLU) and SkillSPAN. BLU is comprised of employers and chambers from across Tennessee to address policy barriers that keep employers from filling middle skills jobs, jobs that require at least some education beyond high school, at minimum, a credential beyond high school. SkillSPAN brings together education, community-based organizations and policy makers to determine how policy and legislation is impacting those served by these organizations. The coalitions include chambers of commerce, employers, community college and workforce leadership and those working in state organizations to develop a state policy agenda and talk to legislators at the federal and state level to inform future policy and legislation.



YOUNG PROFESSIONALS

Building the next generation of leaders, YP Nashville is a partnership between the Nashville Area Chamber of Commerce and 50 young professional organizations working together to engage, connect and empower young professionals to actively shape the future of the Nashville region.

YP NASHVILLE

YP Nashville connects, empowers and engages young professionals in the development of the Nashville region. Nine new partner organizations joined YP Nashville to include more than **50 partner organizations** young professionals can seamlessly engage for meaningful volunteer and community leadership opportunities. In addition to the events and programs offered by YP Nashville partners, YP Nashville expanded to year-round programming with professional development (Leadership Series) and high-value networking and learning from an expert on a regional topic (Drinks and Dialogue). Sessions included regional economic development, business development with purpose, young professional voter turnout and civic engagement. YP Nashville Connect included more than **600 young professionals** connecting with YP Nashville partners in a trade-show style to learn about opportunities to help advance the Nashville region and to enjoy local food and drink.

YOUNG TALENT COUNCIL

The Young Talent Council consists of human resource leaders from **17 employers** advising the development of YP Nashville and designing the Nashville Region Young Talent Guidebook. Based on a best practice from the Greater Philadelphia Chamber of Commerce, the guidebook will focus on **10 key strategies** to retain and attract young talent and include profiles of Nashville area employer and research on the workplace qualities, environment and priorities of young talent.

A photograph of the Nashville State Capitol building, a large neoclassical structure with a prominent dome and columns, set against a clear blue sky. The building is partially obscured by a dark blue semi-transparent rectangular overlay that contains the text.

POLICY

Through changes in elected leadership, Nashville's fiscal struggles, a global health crisis and recession, the Nashville Area Chamber continues to set the community agenda as the voice of business throughout Middle Tennessee. By focusing on community development and advocacy, the Chamber supports our members and creates an environment where businesses can succeed and our local economy can thrive.

SUPPORT FOR BUSINESSES DURING COVID-19

Since the first cases of COVID-19 were reported in Tennessee, Chamber policy staff have actively tracked and shared Safer at Home Orders; provided updates on business and employee assistance offered by Congress, the State and Metro Nashville-Davidson County; and conveyed guidance and regulation around reopening. Our marketing and communications team shared information with members through our Coronavirus Resources and Reopening webpages. The policy team continues to track and lobby when necessary for legislation and regulation to benefit Middle Tennessee businesses impacted by COVID-19 and help businesses prepare to thrive in recovery.

METRO

RELEASE OF THE METRO FINANCE STUDY

On February 28, 2020, the Nashville Area Chamber of Commerce, in partnership with the Greater Nashville REALTORS® released an independent study of Metro finances conducted by Elliott Davis. This study determined that Metro's financial difficulties were primarily a revenue issue. The Metro Finance Study helped inform the Chamber Board in their discussion of Metro's budget. The Board issued a statement of support for Mayor Cooper's proposed FY21 Metro Operating budget and Council member At-Large Bob Mendes' substitute operating budget, which was adopted by Metro Council. The Metro Finance Study can be found at [**nashvillechamber.com**](https://nashvillechamber.com).

AFFORDABLE HOUSING

On February 18, 2020, the Chamber hosted an affordable housing engagement event designed to connect members who work in affordable housing with those in the community who wanted to learn more. The event stressed the importance of cross-sector partnerships in the Nashville region to develop and preserve affordable housing.

MIDDLE TENNESSEE REGION

VITAL SIGNS

Vital Signs 2019 was released in spring 2020. The topics for Vital Signs 2019 were workforce development, transit/transportation, housing, infrastructure and solid waste and were selected in consultation with the mayors of Middle Tennessee. Vital Signs 2019 included a regional resident survey and data from the Census and other sources. It reflects the region's workforce and economy pre-COVID-19. Vital Signs 2019 remains relevant, however, because the issues that Middle Tennessee faced before the pandemic – especially around workforce – remain and the region's rate and path to recovery depends, in large part, on how these issues are addressed during the current crisis.

STATE

TENNESSEE STATE LEGISLATURE

In light of the COVID-19 outbreak in Tennessee, the General Assembly abruptly adjourned on March 19th after a feverish few days of legislators debating “essential” bills, primarily related to Governor Lee’s adjusted budget proposal which was cut by nearly a billion dollars from his initial proposal. Following a 10-week recess, the House of Representatives returned to work on May 26th and the Senate returned on May 28th to complete the legislative session. Leadership adhering to its plans as announced in April, the House picked up where it left off with legislation discussed in March, while the Senate focused only on legislation related to COVID-19, the budget or “mission critical items.” Over the following three weeks, neither body deviated from their plans with the House debating hundreds of bills and the Senate only discussing and passing a few bills. During this time, the Chamber achieved a legislative win with the Pregnant Workers Fairness Act, but had to wait for the Governor to call a special session on August 10 before Tennessee COVID-19 Recovery Act was passed.

PREGNANT WORKERS FAIRNESS ACT

This legislation has been debated since 2015, but this was the first year that the Nashville Area Chamber and other urban chambers have been involved and supportive. Following several revisions made at the request of the business community, language was drafted to ensure that pregnant workers are provided common sense, reasonable accommodations that are not burdensome to employers. With a long list of bipartisan sponsors, the legislation passed the Senate 29-0 and the House 92-0-1.

TENNESSEE COVID-19 RECOVERY ACT

The Chamber joined the Tennessee Business Recovery and Safe Harbor Coalition which consisted of more than 30 industry associations to support legislation protecting Tennessee businesses from frivolous lawsuits tied to COVID-19 exposure. After failing in the final moments of the legislative session (reconvened in June), the General Assembly reconvened for a special session on August 10 and the Tennessee COVID-19 Recovery Act was passed on August 12. The law provides protection to businesses, schools, hospitals and other entities from frivolous lawsuits alleging the contraction of COVID-19 if they are taking reasonable safety measures by following local, state and federal guidance. Plaintiffs will have to meet a higher standard of clear and convincing evidence and they may only prevail if an entity acted with gross negligence or willful misconduct. The House approved the proposal with a vote of 80-10-1 and the Senate approved it with a vote of 27-4. The law will remain in effect until July 2022 when it will be repealed.

MOVING FORWARD

TENNESSEE STATE LEGISLATURE

On January 8, 2020, the Moving Forward Mobility Policy Task Force released the *Regional Coordination Study*. The Task Force considered the experience of seven peer and aspirational regions from across the country to understand how Middle Tennessee coordinates to create regional transit compared to how other regions have collaborated across jurisdictions to provide transit options. The review of peer regions revealed that there is no single model that ensures successful creation of regional transit. There are regions that have created regional entities that encompass all or portions of multiple cities and counties to conduct governance and planning, collect and disseminate transit funding, etc., on the regional level. There are as many regions, however, that utilize the federally required Metropolitan Planning Organization (MPO) to conduct planning and then use inter-governmental agreements to work across jurisdictions on constructing and operating transit systems. This is a model that has been successful in peer regions and is a model that Middle Tennessee is well-suited to replicate. While there are multiple models of regional coordination, the review of peer regions revealed that **all** the regions offering transit to their residents have funding streams dedicated solely to transit. To read the full *Regional Coordination Study*, visit **movingforwardmidtn.com**.

MAYOR COOPER'S TRANSPORTATION PLAN

On March 12, Moving Forward hosted a meeting for Moving Forward volunteers, Nashville Chamber members and other transit partners to directly voice their values, priorities and goals for Mayor Cooper's forthcoming transportation plan. It complemented the numerous community meetings and stakeholder meetings held by Mayor Cooper's office on how Metro Nashville should prioritize transportation investments. A budget exercise, where each person was able to choose how to invest "\$20" of limited public resources among several transportation investments, revealed transit as the top vote getter among Moving Forward volunteers, followed by sidewalks, signals/traffic operations and working with TDOT on interstates, state routes and freight movement.

After that engagement opportunity for Moving Forward members, the Moving Forward Coordinating Committee issued a recommendation on the forthcoming Transportation Plan, outlining elements that should be included for a comprehensive and equitable Transportation Plan. At the date of publication of the Annual Report, the city has recently released the draft Transportation Plan for public comment.

TRANSIT DURING COVID-19

Moving Forward has continued to champion mobility and investment in transit throughout the COVID-19 pandemic. Transit is crucial in our region's response to COVID-19 serving the essential workers that work in hospitals, groceries and pharmacies among other needed businesses.

Transit is also critical in Middle Tennessee's economic recovery enabling more residents to access jobs and training as the economy reopens. Safe, high-quality, high-frequency, multi-modal transportation is important to our region. The pandemic has demonstrated that transit systems with dedicated funding are better equipped to continue to serve essential workers and facilitate equitable recovery. For this reason, Moving Forward remains committed to securing dedicated funding for transit.

Moving Forward will host a Speaker Series in the fall of 2020. Open to the public, the speaker series will explore how COVID-19 could change the design of cities and infrastructure, how the federal government could respond to aid transit during COVID-19 and recovery, and how policymakers at the state, regional and local level are adjusting to changes in transit usage and preparing for transit and transportation in the future. More information can be found at ***movingforwardmidtn.com***.



A man with a beard, wearing a light-colored blazer over a white shirt, is speaking into a microphone. He is gesturing with his right hand. The background is blurred.

SMALL BUSINESS & ENTREPRENEURSHIP

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. From July 2019 through June 2020, more than **4,000 small business owners and employees** were served through the Chamber's small business programs. In-person programming served **342 participants** and virtual programming served **3,716 participants**. The Chamber continues to enhance its focus on small business with new programming including a suite of virtual programs implemented to support business recovery from COVID-19.

#BEAGOODNEIGHBOR

The Chamber launched the "Be a Good Neighbor" campaign to spotlight businesses that have worked to be a part of the solution for COVID-19 and have pivoted their own business to support recovery efforts.

BUSINESS STUDIO

Business Studio offers monthly workshops and professional development programs to help small business owners improve their operations and grow their bottom line. This year, virtual programs provided resources for small business owners impacted by the tornado and COVID-19.

GROWING TOGETHER – WOMEN IN SMALL BUSINESS

This program was launched in May 2020 to help women succeed in business by providing training, resources and mentoring opportunities. The four-part Growing Together series focused on realigning, rebooting, redesigning and rerouting your business in response to COVID-19.

LEADERSHIP CONNECT

Each year, a small class of entrepreneurs come together to collaborate and learn from the region's top leaders on how to become more involved in affecting positive change in the Nashville community. Participants meet with CEOs and community experts to develop a deeper understanding of what is needed to move our region forward.

NASHPRENEURS CONFERENCE

The second annual Nashpreneurs Conference featured small business leaders, entrepreneurs and creatives for an interactive two-day “Roadmap to Recovery” themed conference. Topics included equitable access to capital, pivoting to new technology, building consumer confidence, leading through crisis and doubling down during a crisis.

NEXT NORMAL & CARES ACT WEBINARS

While many businesses are adjusting to their “new normal,” many are also strategizing and planning for the “next normal.” During these times of uncertainty, the Chamber launched a webinar series specific to business reopening and recovery efforts. The Chamber also hosted a two-part informational webinar in for small business owners on the details of the Paycheck Protection Program, including the payment schedule, eligibility requirements for loan forgiveness, and other options available under the CARES Act.

SMALL & DIVERSE BUSINESS FORUM

This annual event connects small and diverse-owned businesses to major employers. It is hosted through a partnership with the Nashville Area Chamber of Commerce, Music City Center and First Horizon Bank.



MEMBERSHIP

The collaborative spirit of our region allows Middle Tennessee to thrive economically. The Chamber's work is made possible by our members who are driving our region's future. Through Chamber events, programs and initiatives, our members have grown their businesses, taken leadership roles in the community, mentored each other, and helped Middle Tennessee grow and prosper.

BY THE NUMBERS

As Middle Tennessee's largest business federation, the Chamber represents **2,000 member companies** and welcomed **244 new members** last year. Our members range from sole proprietorships to corporations with more than **10,000 employees** and represent more than **100 industry categories**. This year, the member and investor relations teams proactively reached out to all members and investors to check in and understand their needs, particularly in light of COVID-19. The team also hosted **49 ribbon cuttings** and **336 engagement meetings** for new and existing members to share opportunities to get engaged with the Chamber and grow their business.

AREA ADVISORY COUNCILS

Area Advisory Councils continue to create programming that fosters business development and community impact within six geographical areas. Each council provides an opportunity for businesses in these areas to get involved in solving problems, discussing issues and implementing special projects for the benefit of the areas in which they work. In response to COVID-19, the Area Advisory Councils collectively launched a bi-monthly webinar series called "Content, Coffee & Conversation" to provide content that is relevant to businesses while offering tangible action steps for recovery.

ENGAGEMENT

SINCE JULY 1, 2019
**9,500 INDIVIDUALS
ATTENDED MORE
THAN 100 CHAMBER
EVENTS & WEBINARS,**
A **22% INCREASE**
FROM LAST YEAR

**THE HIGHEST ATTENDED
IN-PERSON EVENT WAS
YP NASHVILLE CONNECT
WITH 650 PARTICIPANTS.**

**THE HIGHEST ATTENDED
WEBINAR WAS "MANAGING
YOUR BUSINESS
THROUGH COVID-19"
WITH 890 PARTICIPANTS.**

BETWEEN MARCH AND
JUNE 2020, **NEARLY
4,000 PARTICIPANTS
JOINED THE CHAMBER'S
VIRTUAL PROGRAMS.**

MARKETING & COMMUNICATIONS

Our Marketing and Communications team is charged with growing our brand, maximizing engagement and connecting our brands to target audiences in meaningful ways. This team supports internal Chamber departments to communicate with numerous audiences including Chamber members, prospective members, government officials, the community and media. Our Marketing and Communications team has focused intensely on overlaying strategic thinking and marketing analytics to how we approach our brand, brand messaging and our brand position.

TRANSFORMATIVE STORYTELLING & DATA-DRIVEN RESULTS

We continue to achieve strong results from our marketing strategies and campaigns driving online conversions for membership, increasing leads through our marketing funnel with our sales enablement print and digital collateral, growing event attendance year-over-year with a record number of event registrations (even virtually during COVID-19) and increased social engagement across all digital platforms. Our agency level design and storytelling has transformed our consumer-facing brand image and produced results.

WEBSITE STATS

740K PAGE VIEWS
390K WEBSITE SESSIONS

SOCIAL MEDIA STATS

1.6 MILLION IMPRESSIONS
50K ENGAGEMENTS
64K FOLLOWERS ACROSS ALL PLATFORMS
37.2K TWITTER FOLLOWERS
16.1K LINKEDIN FOLLOWERS
9.3K FACEBOOK FOLLOWERS
3.2K INSTAGRAM FOLLOWERS



SPIRIT OF THE REGION

The Spirit of the Region Awards recognize individuals who are propelling this region forward by devoting their time and energy to helping advance key regional priorities. Since 2008, the Chamber's annual awards have honored individuals and companies that have contributed the most toward the organization's purpose of creating economic prosperity by facilitating community leadership. These individuals embody the Chamber's brand promise to Belong, Engage, Lead and Prosper while helping position Middle Tennessee for continued success.



AWARD RECIPIENTS



MISSY ACOSTA

VICE PRESIDENT, BRAND STRATEGY,
DELTA DENTAL OF TENNESSEE

Missy Acosta serves as vice president of brand strategy for Delta Dental of Tennessee and is the chair of the Nashville Area Chamber of Commerce's Business Conditions Council (BCC). The BCC is comprised of business leaders from a cross-section of the region's economy who gather regularly to provide insight into current and emerging economic conditions. Acosta's leadership of the BCC has come at a critical time for Nashville's economy, providing regular updates on the impact COVID-19 has had on Nashville's key industries. Acosta has more than 25 years of experience in consumer branding and marketing across a diverse set of industries including insurance, healthcare, technology, economic development, public utilities, entertainment and consumer products. She values community engagement, having served as a board and committee member for Big Brothers Big Sisters of Middle Tennessee, American Diabetes Association, Scott Hamilton CARES Foundation, St. Jude Children's Research Hospital, Dismas, Inc., Kiwanis of Nashville Foundation and Nashville Cable.



SAMUEL H. HOWARD

POSTHUMOUS AWARD

The legacy of the late Samuel H. Howard will be felt for many generations. He became the first African American chairman of the Nashville Area Chamber of Commerce Board of Governors in 1998 and was actively involved as one of the region's top business and community leaders for nearly five decades. Originally from Oklahoma, Howard was the one of the first Black White House fellows in the 1960s. Howard founded Phoenix Holdings, Inc. and Phoenix Communications Group, Inc. in the 1970s. His career included roles at Meharry Medical College, Hospital Affiliates International, the Hospital Corporation of America and Xantus Corporation. Among his many community leadership roles, Howard chaired the Urban League of Middle Tennessee and co-founded 100 Black Men of Middle Tennessee. While his awards and accolades are many, he will best be remembered as a leader who always reached back to help and mentor others. He is survived by his wife Karan and two children, Anica Lynne Howard and Samuel H. Howard II.

AWARD RECIPIENTS



A. ALEX JAHANGIR, M.D
PROFESSOR OF ORTHOPAEDIC SURGERY
AND ORTHOPEDIC TRAUMA SURGEON,
VANDERBILT UNIVERSITY MEDICAL CENTER

Dr. Alex Jahangir is a Nashville native and top civic leader serving as chair of Metro Nashville’s Coronavirus Task Force and chair of the Metropolitan Nashville Board of Health. An expert in health policy and the delivery and business of healthcare, Dr. Jahangir is a professor of orthopaedic surgery and an orthopedic trauma surgeon at Vanderbilt University Medical Center. He also serves on the board of the Adventure Science Center. Since March of 2020, Dr. Jahangir has become a household name in the Nashville area through his role on Metro’s Coronavirus Task Force. In a time of uncertainty, he provides guidance and assurance to Nashvillians to help curb the spread of the virus and promote a safe and healthy recovery.



C. WRIGHT PINSON, M.B.A., M.D.
DEPUTY CEO AND CHIEF HEALTH SYSTEM
OFFICER, VANDERBILT UNIVERSITY
MEDICAL CENTER

In addition to his leadership roles at Vanderbilt University Medical Center (VUMC), Dr. Wright Pinson is the chair of the Nashville Area Chamber’s regional economic development initiative, Partnership 2020. Since July 2019, Dr. Pinson has been leading the effort to develop the next five-year economic prosperity plan for the Nashville region, Partnership 2030. The impact of COVID-19 has altered the timeline for the plan rollout requiring a thoughtful approach to ensure the plan meets current and future needs of Middle Tennessee. While providing critical leadership to the Chamber, Dr. Pinson serves a key role in VUMC’s COVID-19 response. Prior to the pandemic, Dr. Pinson had already made a lasting impact on the region’s healthcare industry. He helped organize and lead the Vanderbilt Health Affiliated Network, a 50-hospital affiliated system covering the state of Tennessee. He co-founded the Management in Health Care master’s program at Vanderbilt’s Owen Graduate School of Management. He has been an active clinical and laboratory investigator in the field of transplantation surgery receiving numerous awards for his work.

2019 - 2020 ACTUALS

REVENUE	CHAMBER COMBINED
Investor Contributions	\$3,499,397
Membership Dues	\$1,573,595
Sponsorship Revenue	\$778,385
Program Revenue	\$888,784
Total Revenue	\$6,740,161
EXPENSES	
Economic Development	\$958,526
Investor Relations	\$810,863
Marketing & Communications	\$498,506
Research	\$437,983
Talent Development	\$735,334
Education	\$149,341
Policy	\$914,379
Membership Services	\$863,936
Programs & Events	\$669,621
General & Administrative	\$690,414
Capital Expenditures	\$777,643
Total Expenses	\$7,506,546
Net Excess/Deficit	\$766,385

2020 - 2021 BUDGET

REVENUE	CHAMBER COMBINED
Investor Contributions	\$2,979,061
Membership Dues	\$1,400,374
Sponsorship Revenue	\$923,120
Program Revenue	\$1,360,408
Total Revenue	\$6,662,963
EXPENSES	
Economic Development	\$870,217
Investor Relations	\$656,454
Marketing & Communications	\$481,196
Research	\$462,383
Talent Development	\$466,899
Education	\$302,067
Policy	\$781,324
Membership Services	\$792,123
Programs & Events	\$1,136,532
General & Administrative	\$680,270
Capital Expenditures	-----
Total Expenses	\$6,629,465
Net Excess/Deficit	\$33,498

CREATING ECONOMIC PROSPERITY BY FACILITATING COMMUNITY LEADERSHIP



NASHVILLE
AREA
CHAMBER
OF COMMERCE