

TULLAHOMA COMPREHENSIVE PLAN

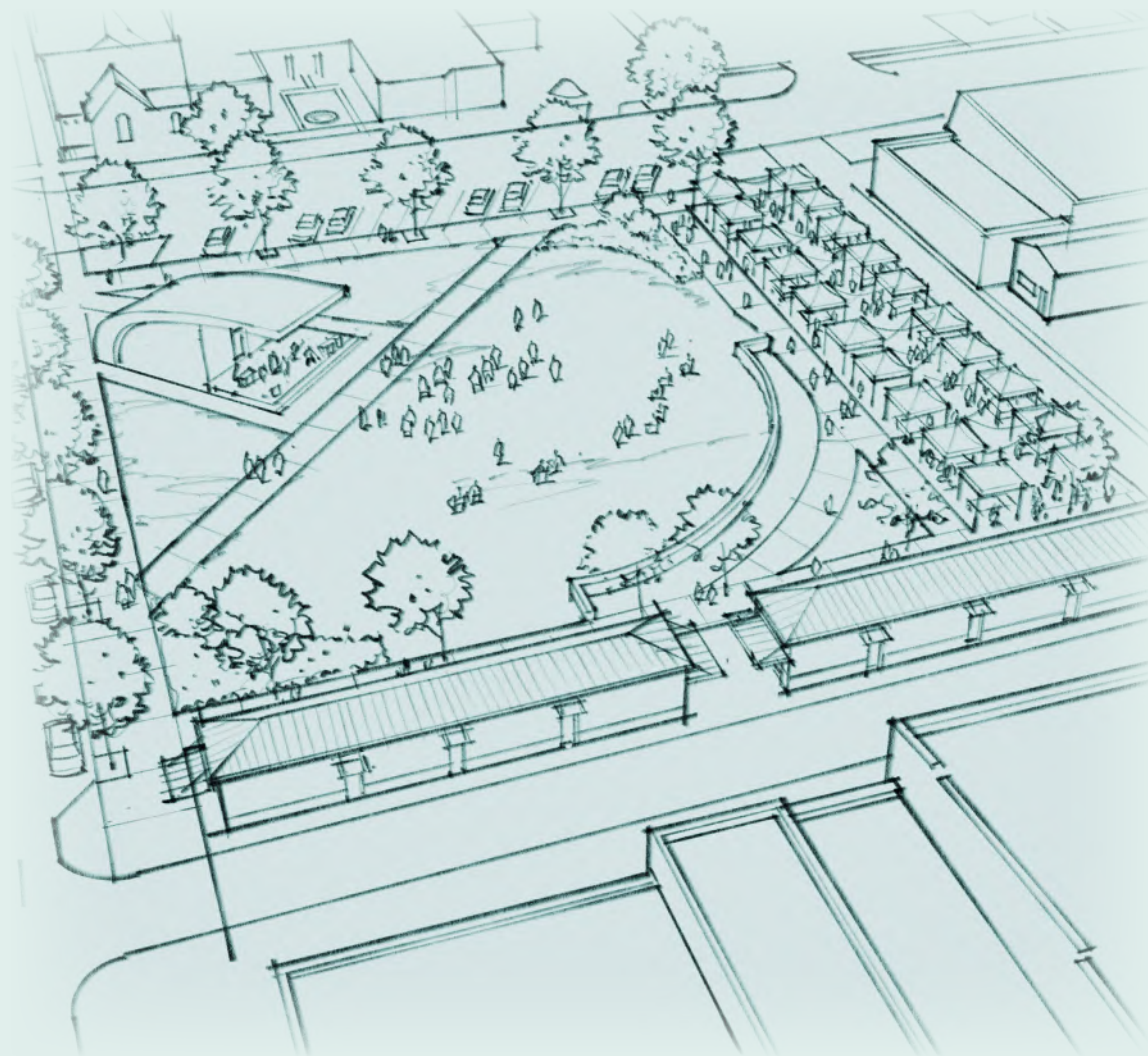


prepared for the

**CITY OF
TULLAHOMA,
TENNESSEE**



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and

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TABLE OF CONTENTS

Topic	Page
EXECUTIVE SUMMARY	i
BACKGROUND	
Community Overview	1
Plan Intent	2
Project Approach	3
Development History	4
EXISTING CONDITIONS	
Natural Features	7
Built Features	11
Socio/Economics	21
Housing Market	24
Event Venue Market	26
Public Policies and Entities	27
Future Build-Out Scenario	33
Climate Change	35
PUBLIC INPUT & PLANNING PRINCIPLES	
Public Meetings	36
Public Opinion Survey	37
Charrette Workshop Results	38
Planning Principles	39
THE PLAN	
Place Types	41
Mobility and Infrastructure & Facilities	60
Natural and Cultural Resources	74
Public Space and Recreation	77
Community Design	81
Downtown	84
Housing	89
Economic Development	97
Resiliency	100
Plan Implementation	105
	107

Topic

APPENDICES

- A. Public Opinion Survey Results
- B. Economic Baseline Analysis
- C. Housing Market Analysis
- D. Event Venue Market Analysis
- E. Economic Development Strategy

Tullahoma Comprehensive Plan



EXECUTIVE SUMMARY

PLANNING PROJECT OVERVIEW

Located in Coffee and Franklin counties in southern Middle Tennessee, Tullahoma has over 20,000 residents. It is strategically located between Nashville, which is 71 miles to the northwest, and Chattanooga, located 77 miles to the southeast.

Project Intent

The City's Request for Proposals (RFP) document to solicit proposals from consultants summarized this plan's intent as follows:

"The comprehensive development plan will serve as the guiding document for growth and development regarding land use, zoning, utility capacity and construction, economic development, traffic management, recreation, capital budgeting, provision of municipal services and facilities, housing, and community engagement."

Project Approach

The following five key steps were taken to create this Comprehensive Plan:

- Task 1.0: Project Kick-Off ~~and~~ Research
- Task 2.0: Visioning ~~and~~ Economic Assessment/Analysis
- Task 3.0: Charrette ~~and~~ Concept Plan
- Task 4.0: Draft Plan Preparation ~~and~~
- Task 5.0: Plan Presentation ~~and~~ Revisions

"We are a growing city, but still have a small town feel."

Surveyed citizen

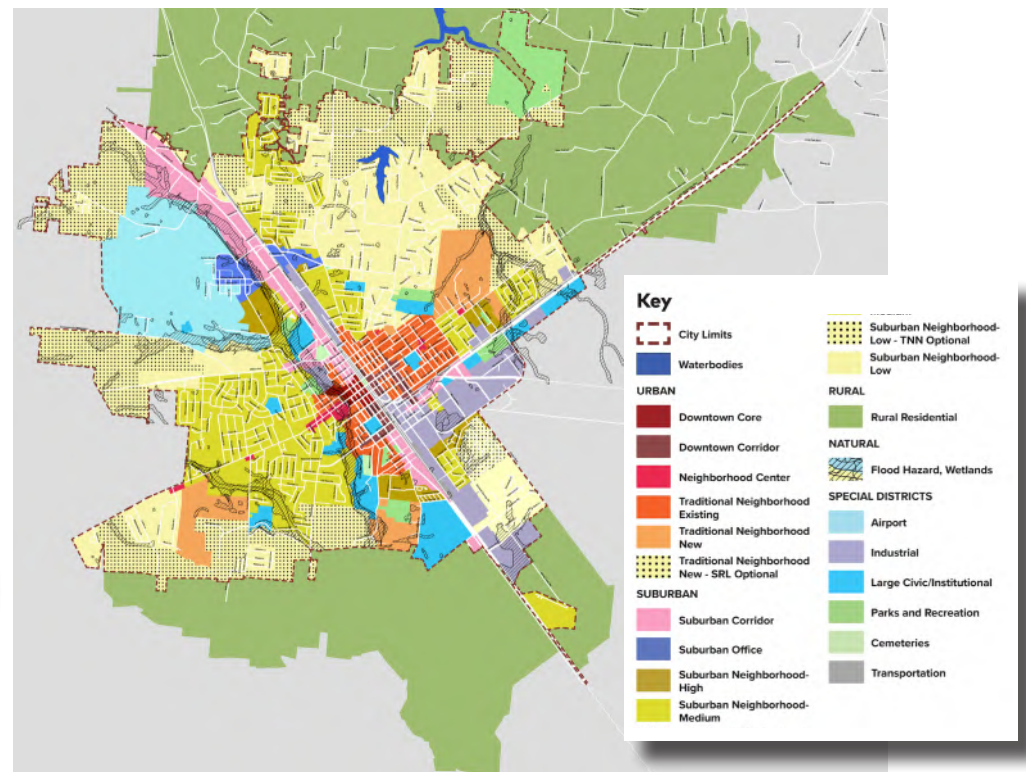
There were many opportunities for public engagement, including numerous public and stakeholder meetings, an online public opinion survey taken by over 1,000 citizens, and a five-day charrette, which included an intensive brainstorming workshop engaging the public to develop key planning ideas.



PLACE TYPES

"Place Types" are determined by land uses, density, form and character. The 20 different Place Types for Tullahoma are mapped below (bottom) and the transect illustrating the five primary Place Types is immediately below. Place Types are implemented through zoning and development standards.

TULLAHOMA PLACE TYPES TRANSECT

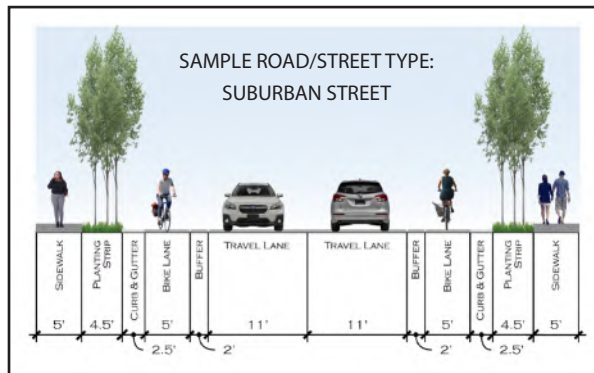


EXECUTIVE SUMMARY

MOBILITY

This plan section includes a list of planning principles, a summary of the “complete streets” concepts, a description and graphics for Tullahoma’s various Road/Street Types, proposed road/street improvements and connections, and plans for non-motorized travel, including bike lanes and greenways. As with Place Types, Road and Street Types are categorized into Rural, Suburban and Urban Types (Natural and Special are not applicable). The seven types include the following:

- Rural Parkway
- Rural Suburban Road
- Suburban Avenue
- Suburban Street
- Local Suburban Street
 - New Development
- Urban Avenue
- Urban Street
- Local Urban Street
 - New Development



and INFRASTRUCTURE & FACILITIES

This plan section addresses utilities such as public sewer and water, electricity, gas and telecommunications. There are also recommendations for “green infrastructure,” which entails alternatives to conventional piping of stormwater by allowing natural absorption into the ground. Examples include:

- Bioswales
- Rain gardens
- Wetlands restoration
- Impervious surfaces



Among the various recommendations for facilities are expanded and new schools, expanded and new emergency service facilities, new cultural venues (library, museum, and Downtown amphitheater) and renovating City Hall.

and NATURAL & CULTURAL RESOURCES

Natural Resources

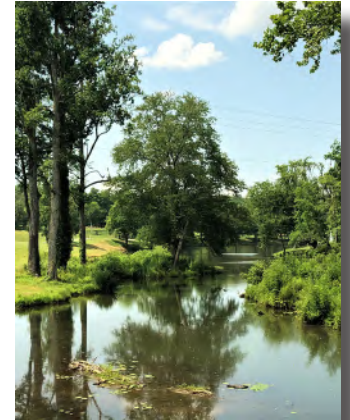
Key recommendations include:

- Discourage the disturbance of floodplains
- Continue to pursue clean-up efforts for streams
- Require street trees in the City’s subdivision regs
- Consider adopting a tree preservation ordinance

Cultural Resources

Key recommendations include:

- Explore the designation of local historic districts
- Prepare design guidelines (even if local historic districts are not designated)
- Promote federal investment tax credits for historic building rehabilitations
- Consider a payment in lieu of taxes (PILOT) program as a preservation incentive
- Pursue certified local government (CLG) status by establishing a preservation program

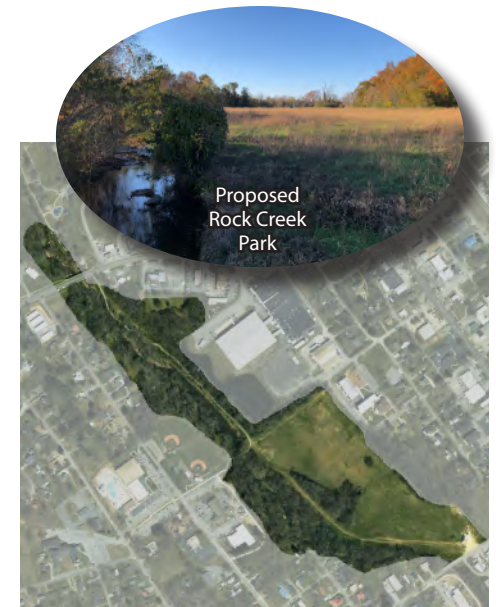


and PUBLIC SPACE & RECREATION

In addition to projects already occurring at Waggoner Park, Johnson Lane Park and Silver Street Park, the following facilities should be pursued:

- Basketball courts
- Pickle ball courts
- Skate park
- Dog park
- Short Springs parking and rest rooms

Also, a group of citizens have advocated for the creation of a new Rock Creek Park between roughly Grundy Street and Wilson Avenue (see at right).



COMMUNITY DESIGN

This section is grounded in the design principles of walkability, mixed uses, calming of motor vehicles, and generous landscaping. Specific concepts were developed, as follows:



North Jackson Street Corridor
The proposed redesign for this corridor features an urban segment (left) and a suburban segment (right) for both within and beyond the ROW.



Scenarios for Grundy Street Site

These two scenarios are for a vacant site on Grundy Street across from the Police Department and overlooking the proposed Rock Creek Park.



The concept on the left features a three-story multi-family building and nine self-parked townhouses. The concept on the right features a two-story multi-family building and five self-parked townhouses, as well as a small restaurant with spectacular views of the new park (see the illustration at right).



DOWNTOWN

Downtown Tullahoma is strongly linked to the image and economic health of the entire community. Consequently, a key recommendation is to establish a downtown revitalization entity. Whether it is affiliated with the national and state level Main Street programs or not, the entity should still follow the Main Street “Four Point” approach:

- Organization
- Design
- Economic Vitality
- Promotion

While a range of recommendations have been made, including some of the community design proposals previously illustrated, recommendations include:

explore historic zoning and design guidelines for Downtown; regulate on-street parking for turnover and create more off-street parking; use the proposed new public space for, among other uses, a farmers market (rendering above); and market analysis to create an optimal tenant mix for business retention, expansion and recruitment efforts.



HOUSING

Based on the housing market analysis and other research conducted as part of this project, primary development concepts include the following:

- Downtown Mixed-Use
- Apartment Communities
- Neighborhood Infill
- Traditional Neighborhoods

It is recommended that regional and national residential developers be recruited through a range of approaches and incentives, as well as direct City participation through tools such as land banking and master planning for sites.



EXECUTIVE SUMMARY

ECONOMIC DEVELOPMENT

While specific strategies of this plan section are too numerous and detailed to address here, key focus areas of this plan section include the following:

- *Health Services and Biomedical Industries Hub* - building on the hospital and other existing resources
- *Aviation and Aerospace Industries and Associated Technology Development* - leveraging AEDC, UTSI, the municipal airport and other facilities
- *Tourism Destination* - building upon existing themes such as whisky heritage and aviation
- *Buildings and Sites* - supporting this economic development strategy
- *Economic Development Structure* - utilizing the City's existing relevant economic development entities

Economic Development Objectives

1. Become a medical services hub and a center for technology innovation, with a focus on testing and product and process development.
2. Identify and prioritize sites and buildings for rehabilitation, redevelopment and new development (e.g., older warehouses, airport business park).
3. Enable development of diverse housing to accommodate the needs of the workforce, professional recruitment, and lifestyle changes.
4. Become a tourism destination, building existing assets and through traffic.
5. Develop a unified voice in marketing our strengths.
6. Enhance our aesthetic qualities through streetscape improvements, especially in our commercial corridors and gateways.
7. Diversify our fiscal base in order to enable more opportunities for funding and staffing projects and programs that are needed in the city.

RESILIENCY

As stated in the American Planning Association's 2020 publication "Climate Change Policy Guide": "Climate change is the most consequential world-wide environmental event that human civilization has had to confront." A few examples of recommendations in this plan section include: discouraging the disturbance of floodplains; encouraging or mandating green infrastructure for stormwater; requiring street trees in the subdivision regulations; and adopting a tree preservation ordinance.

Public Opinion Survey Sample Comments

"It is sad to see the destruction of natural areas, bulldozed for ill-conceived 'development,' and with all the problems that follow."

"Environmental concerns (eliminate plastic bags and bottles, styrofoam). Identify chemical free-mow free zones for butterfly habitat restoration, enforcement of littering fines when observed, etc."

"Quit destroying woodland areas to build housing."

PLAN IMPLEMENTATION

An effective plan implementation strategy helps the community move from vision to reality. Below is an overview of the key components of this critical plan section.

How to Apply the Plan

Primary aspects of applying the plan include the following:

Plan Implementation Committee - This group should meet periodically to review and pursue ongoing implementation, it should be supported by City staff, and it should report to the Board of Mayor and Aldermen at least annually regarding progress

Flexibility - The Comprehensive Plan should be viewed as a living document so that implementation can be adjusted for changing circumstances, although the plan's Planning Principles should always be adhered to.

Plan Updates - As new circumstances, opportunities and challenges for Tullahoma arise, the City should periodically update the plan. It should be updated at least every five years based on new circumstances and the City's implementation achievements for this plan.

Policy Revisions

Among the various recommended policy revisions are those related to zoning, development standards, and the city's Urban Growth Boundaries. This section also highlights, as a side bar, the economic costs of sprawl.

Primary Capital Projects

Examples of capital projects to implement the plan include improvements for roads, bicycling and pedestrian facilities, infrastructure (utilities, stormwater drainage, etc.), parks and recreation, and development of a new public space and additional parking Downtown.

Implementation Matrix

This matrix lists specific recommendations expressed in the plan. It provides a concise statement of each key recommendation, cites the plan pages for more detail, indicates who will be responsible, and when the recommendation should be implemented.



Tullahoma Comprehensive Plan

BACKGROUND



The Arts in Tullahoma

Tullahoma residents are proud of their diverse arts groups and offerings. The South Jackson Civic Center hosts the South Jackson Civic Association, Performing Arts for Children and Teens (PACT), and Community Playhouse, Inc. Tullahoma High School (THS) provides programs in instrumental, vocal, theatrical, and visual arts. The THS band program is recognized for its excellence across the state, and it has received numerous honors. The THS choral department started its show choir in 1976, and it was one of the first in the area. Additional venues for the performing arts include the Annual 41A Music Festival, which hosts local music talent and national artists. The Tullahoma Fine Arts Center displays new artwork monthly from local visual artists. All three organizations produce multiple shows annually, ranging from classic plays to Broadway musicals.

COMMUNITY OVERVIEW

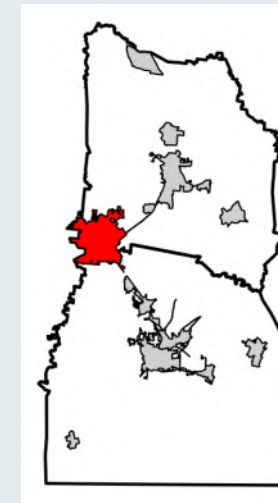
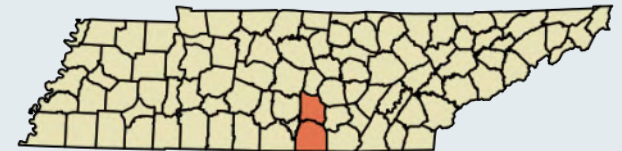
Located in Coffee and Franklin counties in southern Middle Tennessee, Tullahoma is a community of over 20,000 residents. It is strategically located between Nashville, which is 71 miles to the northwest, and Chattanooga, located 77 miles to the southeast. It is also the primary city of the Tullahoma micropolitan area of over 100,000 people. Comprised of Coffee, Franklin, and Moore counties, it is the second largest micropolitan area in the state.

Tullahoma traces its beginnings to 1852 when a work camp was established along the newly-constructed Nashville and Chattanooga Railroad. Some believe that the community's name is derived from a Choctaw word meaning "red rock," although another story is that it was named after a Choctaw chief captured by an early settler in the area. The Tullahoma railroad depot continued as a busy passenger train station for the Nashville, Chattanooga & St. Louis Railway into the 1950s. A range of lines provided service to St. Louis, Chicago, Atlanta, and various points in Florida, although most of those stopped running during the 1960s. While passenger rail service is no longer available to Tullahoma, Amtrak has reportedly considered a new Nashville-to-Atlanta line that would include Tullahoma.

Today, Tullahoma occupies a total area of approximately 23.5 square miles. The community's growth has been steady since the late-20th century based on a mixture of education, services, tourism, and retail. The presence of the Arnold Engineering Development Complex (AEDC) and the University of Tennessee Space Institute, combined with good proximity to the aerospace center at Huntsville, Alabama, has resulted in a growing aeronautical industry as well. Complimenting that facet of Tullahoma is a national

aircraft preservation museum, Beechcraft Heritage Museum, immediately south of the City's municipal airport. The community also benefits greatly from the presence of nearby Motlow State Community College.

According to statistics from the U.S. Census, Tullahoma is currently growing at a rate of 1.03% annually, and it has a population density of 852 people per square mile. The median annual household income is \$48,770, and the poverty rate is 18.27%. The median housing rental cost is \$758 per month, and the median house value is \$146,500. The median age in Tullahoma is 39.3 years, 38.9 years for males, and 39.8 years for females.



These maps illustrate the location of Tullahoma. The map above of the state highlights in red Coffee County on the north and Franklin County to the immediate south. The map at left highlights in red the city boundaries. Most of Tullahoma is located in Coffee County, but the southern portion is within Franklin County.

Graphics Source: Wikipedia

PLAN INTENT

Citywide Comprehensive Plans are called “comprehensive” because they are indeed comprehensive in nature by addressing a broad range of community planning issues. Issues that are typically addressed include land uses, development form and character, mobility, housing, economic development, natural and cultural resource preservation, parks and recreation, infrastructure, and similar issues. The City’s Request for Proposals (RFP) document to solicit proposals from consultants summarized this plan’s intent as follows:

“The comprehensive development plan will serve as the guiding document for growth and development regarding land use, zoning, utility capacity and construction, economic development, traffic management, recreation, capital budgeting, provision of municipal services and facilities, housing, and community engagement.”

Although a variety of plans have been prepared for Tullahoma over the years to address a range of issues and specific places, the most recent citywide Comprehensive Plan was prepared in 2011. While Tennessee does not mandate comprehensive plans, states that do typically require an update every five (5) years. Any effective Comprehensive Plan should answer the following questions:

- *Where are we now?* What are the community’s current conditions?
- *Where are we headed?* In what direction is the community trending?
- *Where do we want to go?* What is the community’s vision for the future?
- *How do we get there?* What is the blueprint for achieving the community’s vision?

Once this Comprehensive Plan is completed and adopted by the City, it can be implemented through a number of different means. One tool for shaping future land uses, densities, development forms and character will be zoning and development standards. Those same regulatory tools can be used to preserve and enhance Tullahoma’s natural and cultural resources. City, state, and federal investments in infrastructure will be another means of implementation. Economic-based strategies might be implemented by the community’s economic development entities, while much of the implementation will occur through the private sector, such as real estate development and new business start-ups.

State Requirements for a Comprehensive Plan

The most relevant State law related to comprehensive planning requirements in Tennessee is statute 13-4-201. *General plan for physical development*, which states:

“It is the function and duty of the commission to make and adopt an official general plan for the physical development of the municipality, including any area outside of its boundaries which, in the commission’s judgment, bears relation to the planning of the municipality.”

It goes on to provide more detail with examples of the types of information that might be included and the planning issues that might be addressed. However, it stops short of mandating specific components that must be included in the plan, as is the case for the planning laws of some states.

It is also noteworthy that another State law - Chapter 1101, was adopted in 1998. It has requirements for municipalities to designate urban growth boundaries (UGBs), but that law is focused on municipal boundaries and annexation, as opposed to comprehensive planning.

Why Prepare a Comprehensive Plan?

There are numerous reasons for a community to prepare and adopt a Comprehensive Plan, but some of the key reasons include the following:

1. **Build Consensus:** Avoid individual agendas pulling in different directions.
2. **Basis for Zoning:** The zoning map and regulations will be revised to reflect the plan.
3. **Secure Funding for Projects:** A plan makes a city competitive with other communities in securing grants.
4. **Enhance Quality of Life:** Both for citizens and for the purposes of business and industrial recruitment.
5. **Fiscal Efficiency:** Maximize infrastructure and similar public investments in a coordinated and strategic manner.

Media Coverage of the Plan

Below are excerpts from the Tullahoma New's article entitled "Citizen express concerns for city's future" on September 17, 2021:

"Tullahoma Senior Planner Mary Samaniego said the meetings were 'very well attended' and that residents who attended 'provided a lot of valuable comments.' City Administrator Jennifer Moody agreed, saying she enjoyed hearing directly from residents and participating in one-on-one discussions at the meetings. 'I have been pleased to see that those who've attended have varied in ages and interests, as well as representing all four quadrants of the city,' she told The News. 'I believe that the large attendance at these meetings and more than 1,000 residents who have completed the Think Tullahoma 2040 survey demonstrates that there is a lot of interest in planning for the future of our city.' Additionally, Walker [consultant] credited the leadership of the city staff and elected officials with the success of the meetings held so far."

PROJECT APPROACH

The approach to preparing this plan is summarized below:

Task 1.0: Project Kick-Off ~~and~~ Research

This initial task served as the research and diagnostic phase on which the balance of work relied. The Consultant Team performed the following sub-tasks prior to, during, and after the three (3) day Trip #1 to Tullahoma on July 6-8, 2021:

- Task 1.1: Kick-Off Meeting ~~and~~ Study Area Tour
- Task 1.2: Public Engagement Strategy Confirmation
- Task 1.3: Physical Analysis
- Task 1.4: Existing Conditions Mapping
- Task 1.5: Public Policy ~~and~~ Programs Review
- Task 1.6: Future Build-Out Scenario
- Task 1.7: Public Kick- Off Meeting

Task 2.0: Visioning ~~and~~ Economic Assessment/Analysis

Although public input was a key aspect of this project throughout its life, Task 2.0 featured a major push to solicit participation from the public. In addition to conducting a public opinion survey with over 1,150 participants, this task included the following steps conducted by the Consultant Team as part of a four (4) day Trip #2 to Tullahoma on August 23-26, 2021:

- Task 2.1: Key Person Interviews (5)
- Task 2.2: Stakeholder Focus Group Meetings (6)
- Task 2.3: Area Meetings (4)
- Task 2.4: Public Opinion Survey
- Task 2.5: Research for Economic Development
- Task 2.6: Housing ~~and~~ Hotel Market Analyses
- Task 2.7: Planning Principles

and

Task 3.0: Charrette ~~and~~ Concept Plan

A "charrette" is an intensive process in which numerous people work together over a limited period of time to develop creative ideas for solving problems. The charrette process has deep roots in the planning and design professions, and Task 3.0 offered the single greatest opportunity for meaningful "hands-on" involvement of Tullahoma's citizens, key community stakeholders, and City officials. The goal of the process was to provide a forum for the public to achieve a consensus. The most tangible outcome was the creation of a Concept Plan as the basis of the ultimate Comprehensive Plan. This five (5) day task comprised the Consultant Team's Trip #3 to Tullahoma, and the following sub-tasks were achieved on November 11-15, 2021:

- Task 3.1: Follow-Up Field Work (Day 1)
- Task 3.2: Public Workshop (Day 1)
- Task 3.3: Concept Strategy Preparation (Days 1-5)
- Task 3.4: Concept Plan Presentation (Day 5)

Task 4.0: Draft Plan Preparation

Based upon the public's, Steering Committee's and City's response to the Concept Plan presented during Task 3.0, a detailed draft plan was prepared. Organized into two main sections - the Background Section and the Plan Section, the details are summarized in the Table of Contents page of this plan and will not be repeated here.

and

Task 5.0: Plan Presentation ~~and~~ Revisions

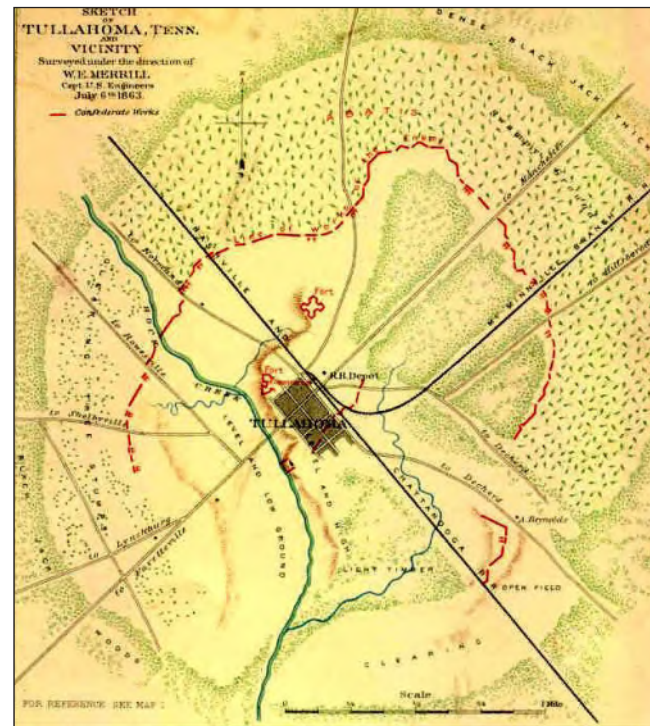
Following the City's review, key members of the Consultant Team presented the draft plan in a public forum on ~~XXXXXX X-X~~ ^{May 19, 2022}, 2021 as part of a one (1) day Trip #4 to Tullahoma. Based upon a review of the draft plan by the Steering Committee and City, input from the public presentation, and the City's submission of a single "red-lined" copy back to the team for revisions, the draft plan was revised and submitted to the City as a final document.

DEVELOPMENT HISTORY

The Tullahoma area has been occupied by people for thousands of years starting with the Paleo era and followed by the Archaic, Woodland and Mississippian cultures. Although white settlers occupied the region starting in the late-18th century, Tullahoma did not exist as a community until 1851 when a railroad camp was established as part of the new Nashville & Chattanooga Railroad. The site of Tullahoma was originally acquired by land speculators after the railroad announced its route. Key original founders included General William Moore and Pierce Anderson. As noted previously on page 1, there are multiple stories on how the town got its name, but there is agreement that Tullahoma is a Choctaw word. By the time of the town's charter in 1852, it had 469 residents, its first business had opened - the store of James Grizzard, and the Lincoln Hotel was accepting guests. That same year, a private school was established and a Methodist church opened. In 1855, the railroad finished construction of the McMinnville branch, which provided access to markets for the region's hundreds of farms. Wheat, flax, corn, and cotton arrived in town by the wagon-loads. The town also became a shipping point for livestock. The First Baptist Church was founded in 1857, and the first recorded city officials were elected in 1857. The original plan of the town founders was for the "Town Square" to be located at the 13-acre plot at the current location of the South Jackson Civic Center. However, when it was decided to move the depot farther north than originally planned to serve both the branch and main lines of the railroad, future town merchants immediately purchased business sites near the new depot instead of the "Town Square."

As with most Southern communities, Tullahoma did not escape the Civil War. When Tennessee seceded, Confederate units were formed with men of the community. After the Battle of Stones River (or Murfreesboro), Tullahoma became the headquarters for

the Army of Tennessee. However, during the Union Army's Tullahoma Campaign in the spring of 1863, the Confederates evacuated Tullahoma. Union troops occupied the town for the rest of the war. Following the war, the economic recovery process began. Fifteen retail merchants had opened stores by 1867, but a fire that same year resulted in the loss of most of those businesses. The immediate post-war years also brought Tullahoma notoriety as an excellent health and summer resort. Tullahoma was famous for its apparent immunity from epidemics and its health-giving waters.



This map was prepared by Union engineers on July 6, 1863, shortly after the Confederates withdrew from Tullahoma. It depicts the system of CS earthworks in red, Rock Creek and tributaries in blue, the Nashville & Chattanooga Railroad line aligned on a NW-SE axis, key roads, the six block town plan at the core, and the various peripheral fields, woods and swamps in green. Graphic Source: Wikimedia

Civil War History

After the Battle of Murfreesboro (or Stones River), Tullahoma became the site of General Braxton Bragg's headquarters for the Army of Tennessee. The "Duck River Line" of Confederate camps and defenses stretched from roughly Shelbyville to Tullahoma. The tenure of the Confederate Army at Tullahoma from January through June of 1863 was to become the longest undisturbed encampment of any Confederate army during the war. It lasted until mid-summer when Union General William S. Rosecrans executed his Tullahoma Campaign, forcing Bragg to give up the town. Most of the remnants of the town's fortifications have been lost over time to development. For example, the fort shown on the map at left immediately north of the historic town core was completely developed over. The only hint of its past is Fort Street, connecting Forrest Drive and North Washington Street. Over four hundred Confederate soldiers remain in Tullahoma to this day, buried in Maplewood Cemetery.

World War II History

The State of Tennessee established Camp Peay as a national guard training camp in 1926. After the attack on Pearl Harbor on December 7, 1941, it was converted into a federal induction center and renamed Camp Forrest. During the war, an estimated 250,000 soldiers passed through the gates of Camp Forrest. One estimate has the town's temporary population reaching 75,000. Camp Forrest covered 10 square miles and was crisscrossed with 55 miles of roads. The 1941 "Tennessee Maneuvers" held there included General George S. Patton. That same year, there was a \$5,000,000 appropriation for 1,300 acres to build an Army Air Force airfield. It was a training center for B-24's, B-25's and P-39 Aircobras, as well as spotter aircraft for training the army's artillery observers. A year later, Camp Forrest became a prisoner of war camp. Prisoners worked in facilities such as the hospital, the bakery, kitchens and the automotive shop. The camp received more than 22,000 POWs during the war.

DEVELOPMENT HISTORY (CONTINUED)

During this time Tullahoma was reportedly the best known summer resort in Tennessee. Key businesses during the late-19th century included saw mills and brick yards.

During the first few decades of the 20th century, numerous businesses and factories were established in Tullahoma, including

Floyd Mitchell and John Mather's wagon and lumber company established in 1919. Eight years later it became the Builder's Supply Company. In 1924, the Lannom Manufacturing Company began manufacturing baseballs and softballs, the same year that Downtown's streets were first paved. The State's establishment of Camp Peay in 1926, followed by its transformation into Camp Forrest during WWII, brought another tremendous wave of growth. See the sidebar at left regarding this era of Tullahoma's history.



Although this map is undated, because of the size of the city at this point, it may have been from several years after the Civil War. Relative to the 1863 map on the previous page, it has grown from six blocks located on the south side of the rail line to dozens of blocks straddling both sides of the tracks. Another possibility is that this map predates the Civil War and is an aspirational plan rather than documenting existing conditions. Graphic Source: City of Tullahoma

After WWII, Camp Forrest was selected as the site of the Arnold Engineering and Development Complex (AEDC). Tullahoma met the important site selection criteria which included easy access to major transportation routes, an inland location away from major natural disaster threats, and its proximity to the relatively inexpensive power produced by the Tennessee Valley Authority. When President Harry Truman dedicated the Center in 1951 he stated, "The great industrial progress of Tennessee, and of the whole South, makes it possible to build this key defense installation in this area."

The most advanced and largest complex of flight simulation and test facilities in the world, AEDC operates 58 aerodynamic and propulsion wind tunnels, rocket and turbine engine test cells, space environmental chambers, arc heaters, ballistic rooms and other specialized units, of which 27 are unique to the United States and 14 are unique in the world. It continues its operations today as part of the United State Air Force Materiel Command and has been the test and evaluation facility for aerospace and aviation through the Cold War, the Space Race, and the War on Terror. It remains the area's largest employer.

DEVELOPMENT HISTORY IN PICTURES



Perhaps the earliest photo of Downtown in the mid-1800s.



The town well and bandstand on Lincoln Street circa 1900.



Atlantic Street (near Lincoln Street) looking west in 1910.



Downtown street in the 1930s or 1940s.



Train station with Downtown in the background circa 1940.



Hotel King in the 1920s.



Aerial view of Camp Forrest barracks in the 1940s.



Camp Forrest's Gate Number 1 circa 1940.



Camp Forrest's warehouses during the 1940s.

Tullahoma Comprehensive Plan



EXISTING CONDITIONS

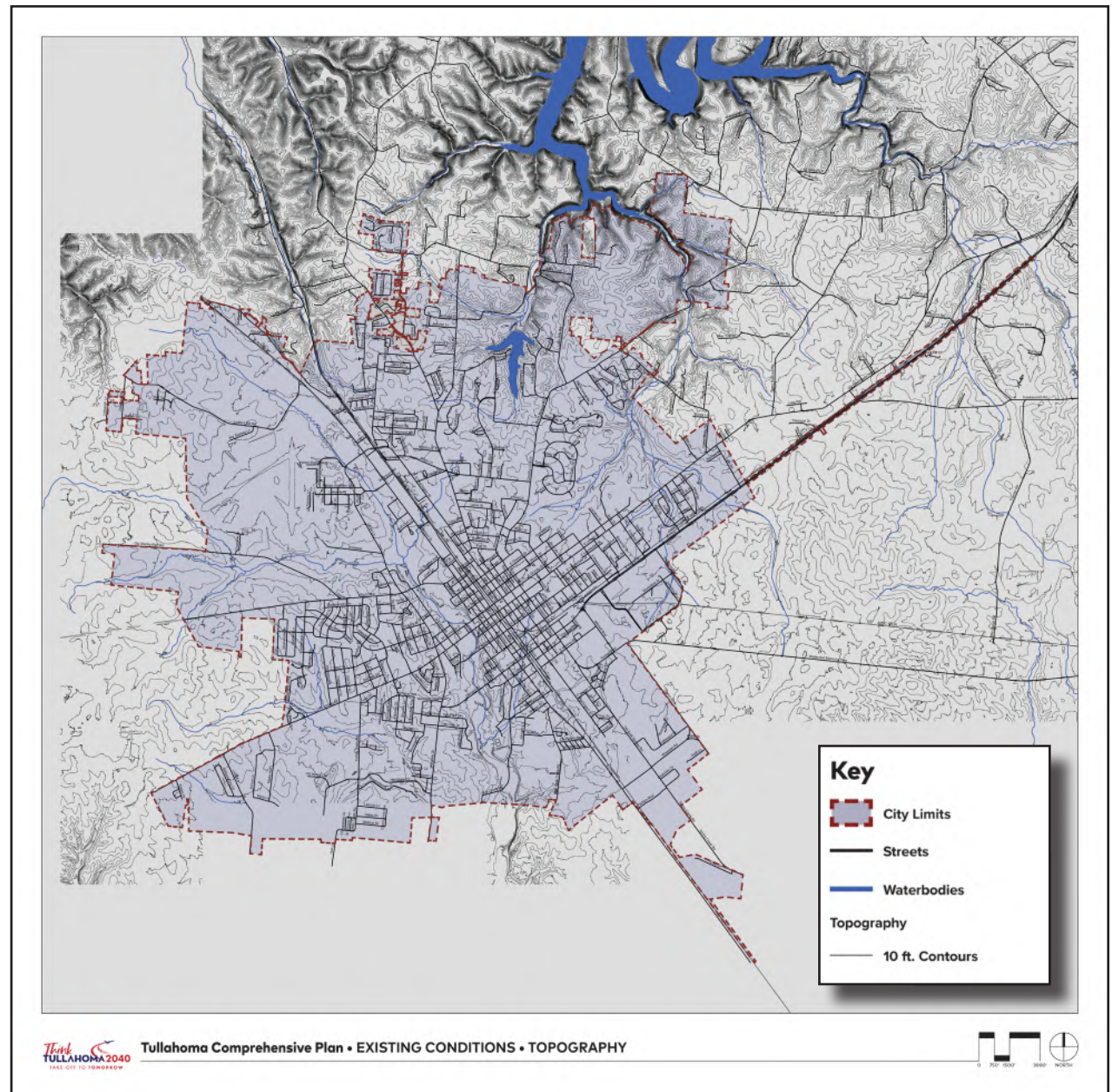
NATURAL FEATURES: TOPOGRAPHY

Why Topography is Relevant

Topography is an important planning issue for two primary reasons - the development potential of land and environmental consequences. In general, the greater the slope, the less development potential due to erosion, problematic soil types, and engineering and site preparation costs. In most locales, slopes exceeding roughly 20% are avoided for development. Some of the most environmentally sensitive lands are found at either end of the topography spectrum. Steep slopes are often forested and serve as important plant and animal habitat, in addition to the air filtration and cooling benefits of trees. Likewise, flat areas are often associated with water bodies and wetlands having rich environmental value.

Tullahoma's Existing Topography

Tullahoma is located on the edge of the Highland Rim, which is an area surrounding Tennessee's Central Basin that contains communities such as Nashville. Tullahoma's topography is somewhat flatter than surrounding areas. The city's highest elevation is 1,165 feet, the lowest elevation is 872 feet, and the average elevation is 1,056 feet. Tullahoma's steepest slopes are found in the northeast portion of the city between Lake Tullahoma and Normandy Lake, while gentler slopes exist in the historic core and to the west. The lowest elevation areas are associated with water resources, such as streams that traverse the community. For more information on Tullahoma's water resources, see the following page.



EXISTING CONDITIONS

NATURAL FEATURES: WATER RESOURCES

Why Water Resources are Relevant

Tullahoma's water resources are significant for two primary reasons - they have a high environmental value, and some are a threat to citizens and property in the form of flooding. Of the water body types illustrated on the map at right, wetlands might provide the greatest value for the following reasons:

- *Habitat:* They are the city's richest habitat for plants and animals, including the greatest biodiversity.
- *Pollution Filtering:* Wetlands are "nature's liver" by filtering pollutants from the water, including stormwater run-off from urbanized areas. Their trees and other vegetation also help to filter the air.
- *Flood Control:* After decades of "hard" solutions (culverts, flood walls, etc.), engineers now recognize the natural flood control of wetlands as "big sponges."

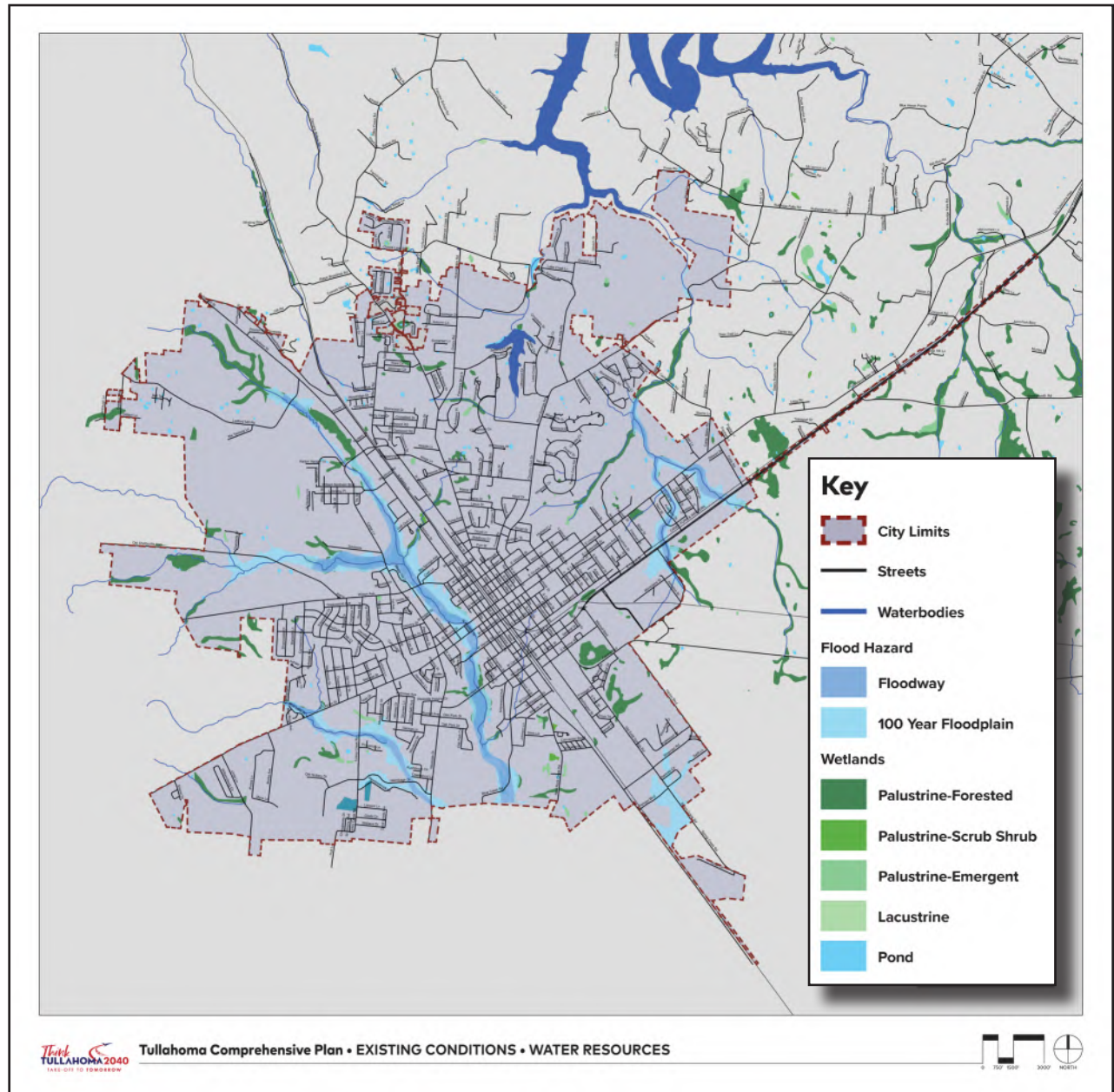
Tullahoma's Existing Water Resources

Tullahoma's primary existing water resources include:

Water Bodies: Key water bodies are: Lake Tullahoma on the north side of town; Ovoca Lake to the immediate north of Lake Tullahoma; Rock Creek and its ^{various} forks; Blue Creek and its ^{various} forks; and Bobo Creek on the northwest part of town.

^{and}
Floodways & Floodplains: Floodways and floodplains are associated with the creeks listed above.

Wetlands: In addition to ponds, Tullahoma has two types of wetlands. The Palustrine wetlands are forested, while the Lacustrine wetlands have limited trees.



NATURAL FEATURES: SOILS

Why Soils are Relevant

Soil types are significant because some soils are much better suited for development than others. The tiny particles that comprise soil can be classified by their chemical composition (mineralogy) and their size. The particle size of a soil, which determines its texture, translates into many of the properties of the soil. Gravel, sand and silt are the larger soil particles. While gravel and sand drain very well, their mobility can create challenges for the stability of building foundations. From a development perspective, the greatest drawback of soils with high levels of clay is their inability to drain well during rainfall.

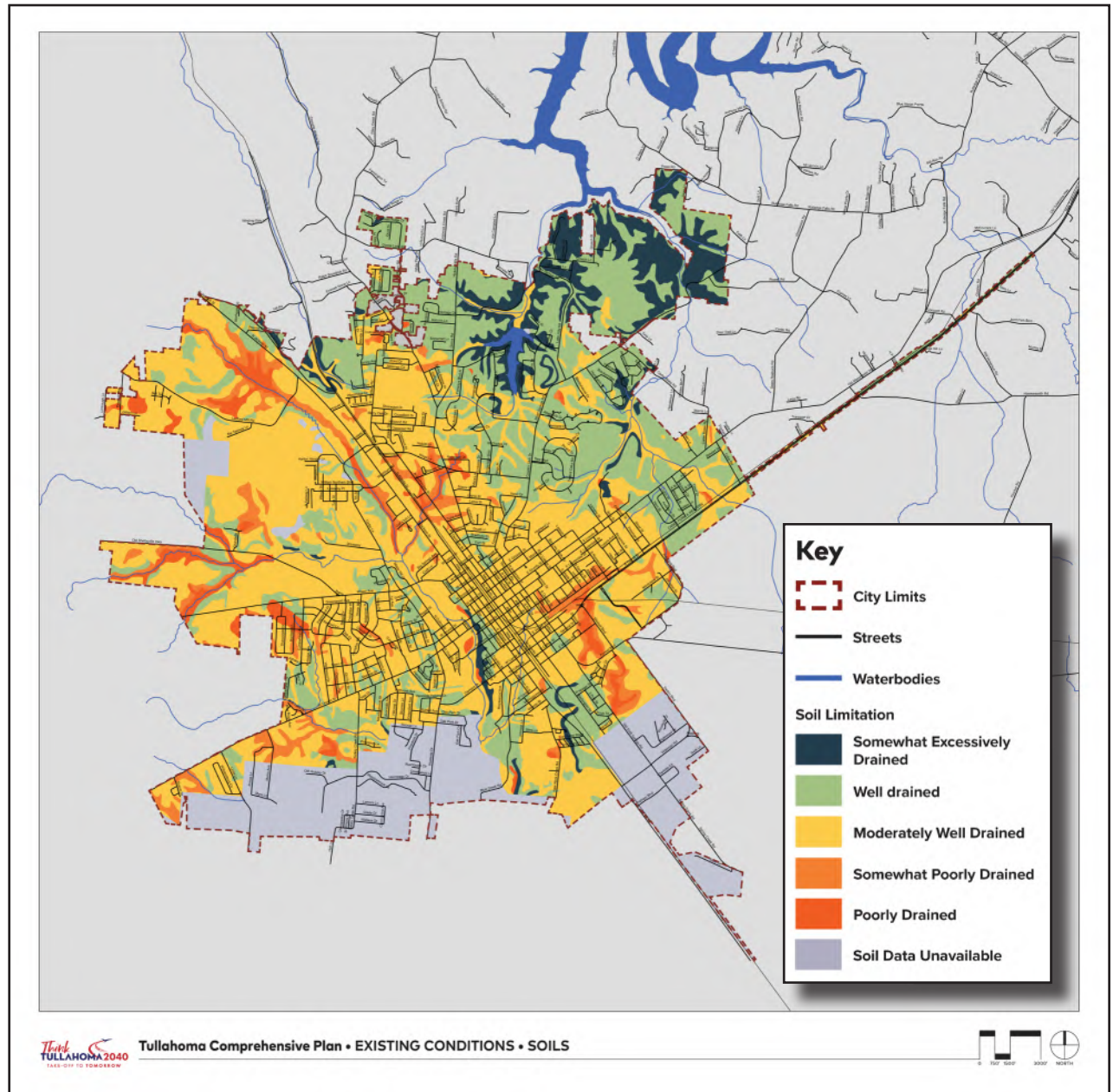
Tullahoma's Existing Soils

As illustrated by the map at right, soil data is unavailable for some parts of Tullahoma, particularly in the southern portion. Regardless, their drainage qualities can be grouped into three categories, as follow:

Somewhat Excessively Drained & Well Drained: These soil types are scattered throughout Tullahoma, but particularly concentrated in the northern portions on steeper terrain near Lake Tullahoma and Lake Normandy.

Moderately Well Drained: The majority of Tullahoma's soils are moderately well-drained, including the core of the city and especially in the southern and western areas.

Somewhat Poorly Drained & Poorly Drained: The most poorly drained soils, which have a high clay content, are found along streams, which explains their linear orientation on the map.



NATURAL FEATURES: FORESTED AREAS

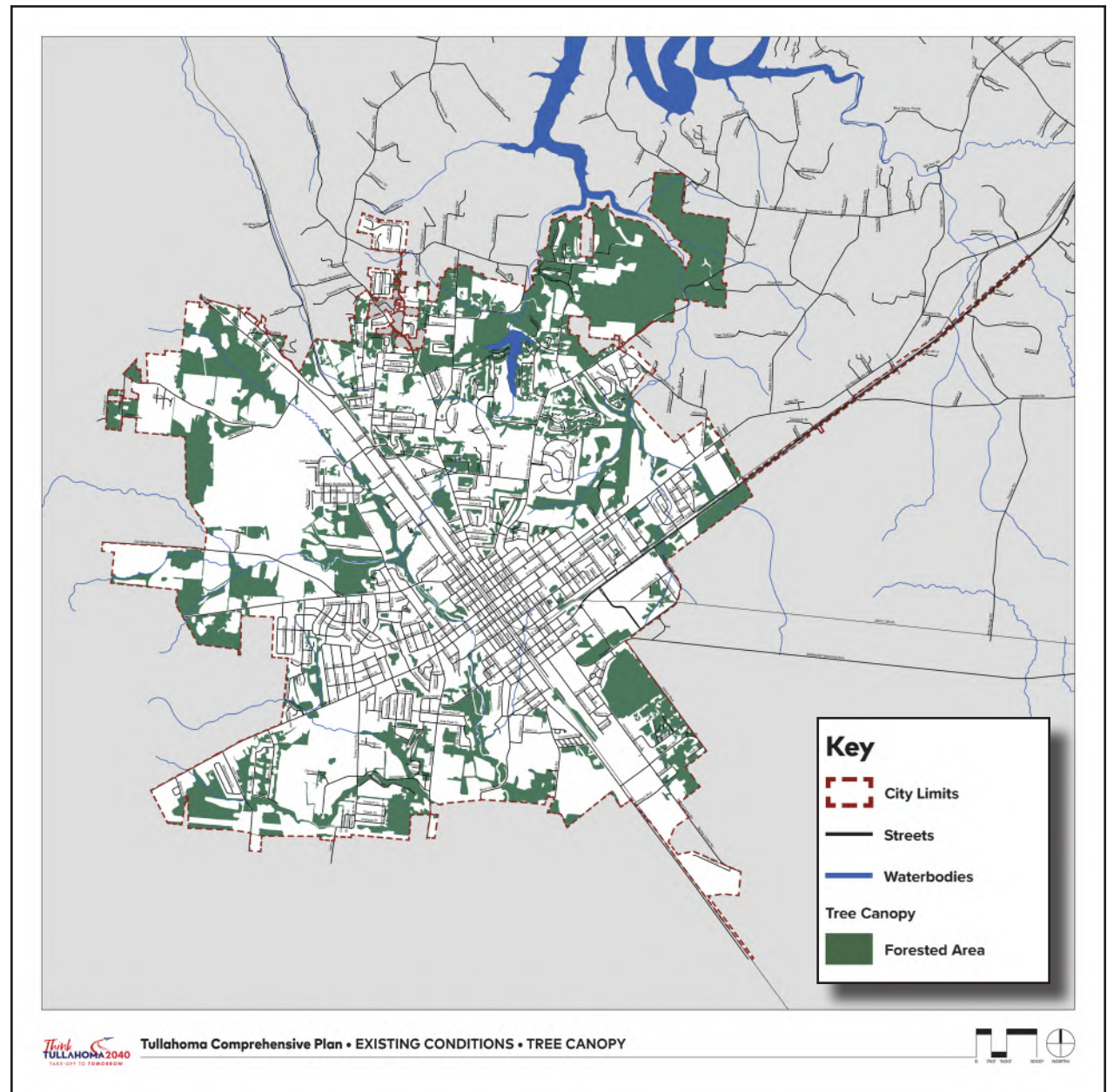
Why Forested Areas are Relevant

Forested areas and their trees are important because:

- Trees reduce the urban heat island effect, which is the phenomenon whereby urban areas have higher temperatures than other areas during the warmest months. Trees help through evaporative cooling, as well as by reducing the amount of sunlight that reaches parking lots and buildings. These benefits are particularly applicable to areas with large impervious surfaces, such as shopping center parking lots.
- Trees improve air quality for breathing by filtering harmful dust and pollutants such as ozone, carbon monoxide, and sulfur dioxide.
- Trees give off oxygen that is needed for breathing.
- Trees reduce the amount of stormwater runoff, which reduces erosion and water pollution. They also reduce the effects of flooding.
- Many species of wildlife depend on trees for their habitat. Trees provide food, protection, and homes for many birds and mammals.

Tullahoma's Existing Forested Areas

Areas with extensive tree canopy are concentrated at the edges of Tullahoma's boundaries, where there is less development and cultivation for crops. The largest expanse of forested area is found in the northeast corner where steeper terrain exists. Forested areas also tend to follow streams where floodways and floodplains result in only minimal development.



BUILT FEATURES: LAND USES

Why Land Uses are Relevant

Land uses are the foundation of any comprehensive plan and they must be carefully considered for compatibility. While the map at right provides useful information on Tullahoma's existing land uses, issues such as residential densities, nonresidential intensities, and development form and character are not reflected. The limitations of existing land use maps are underscored in the plan section addressing "Place Types." As an alternative to the traditional land use plans that comprehensive plans focused on in previous eras, the Place Types Plan addresses densities, intensities, form and character, in addition to land uses. This approach lends itself much more to translation into new zoning categories and zoning maps.

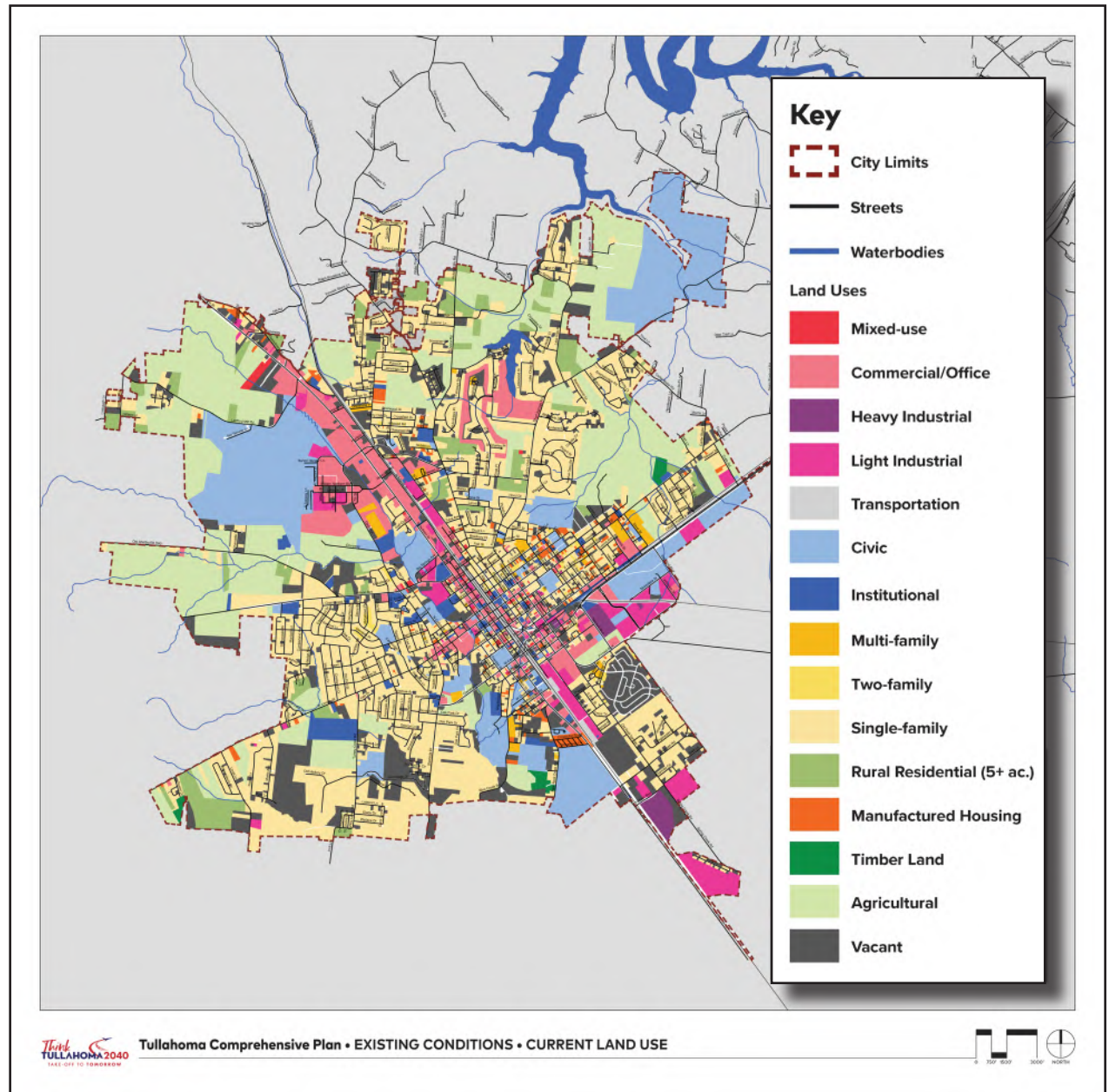
Tullahoma's Existing Land Uses

The map at right depicts 15 general land use categories, but a summary is provided below:

Commercial Uses: These uses are concentrated in the Downtown area and along Tullahoma's key corridors such as North Jackson Street, East Carroll Street, and East and West Lincoln Streets.

Residential Uses: Most of the multi-family housing is in and around Tullahoma's historic core, beyond that area is predominantly single-family housing, and the lowest density rural housing is on the periphery of town.

Other Uses: Other uses include industrial, much of which is mixed within the commercial corridors, civic uses such as the airport located in the northwest part of town, and vacant lands scattered throughout the community.



EXISTING CONDITIONS

BUILT FEATURES:

ROADWAY FUNCTIONAL CLASSIFICATIONS

Why Roadway Classifications are Relevant

Functional classifications for roadways are important because all roads and streets are part of an integrated transportation network that needs to accommodate various modes of traffic in a safe and efficient manner. The classification of each road and street segment determines its role within the larger network, as well as its intended traffic capacity and design.

Tullahoma's Existing Roadway Classifications

National Highway System roadways are critical to the nation's mobility, economy, and defense.

Principal Arterials provide regional mobility and access to major activity centers, often carrying the highest traffic.

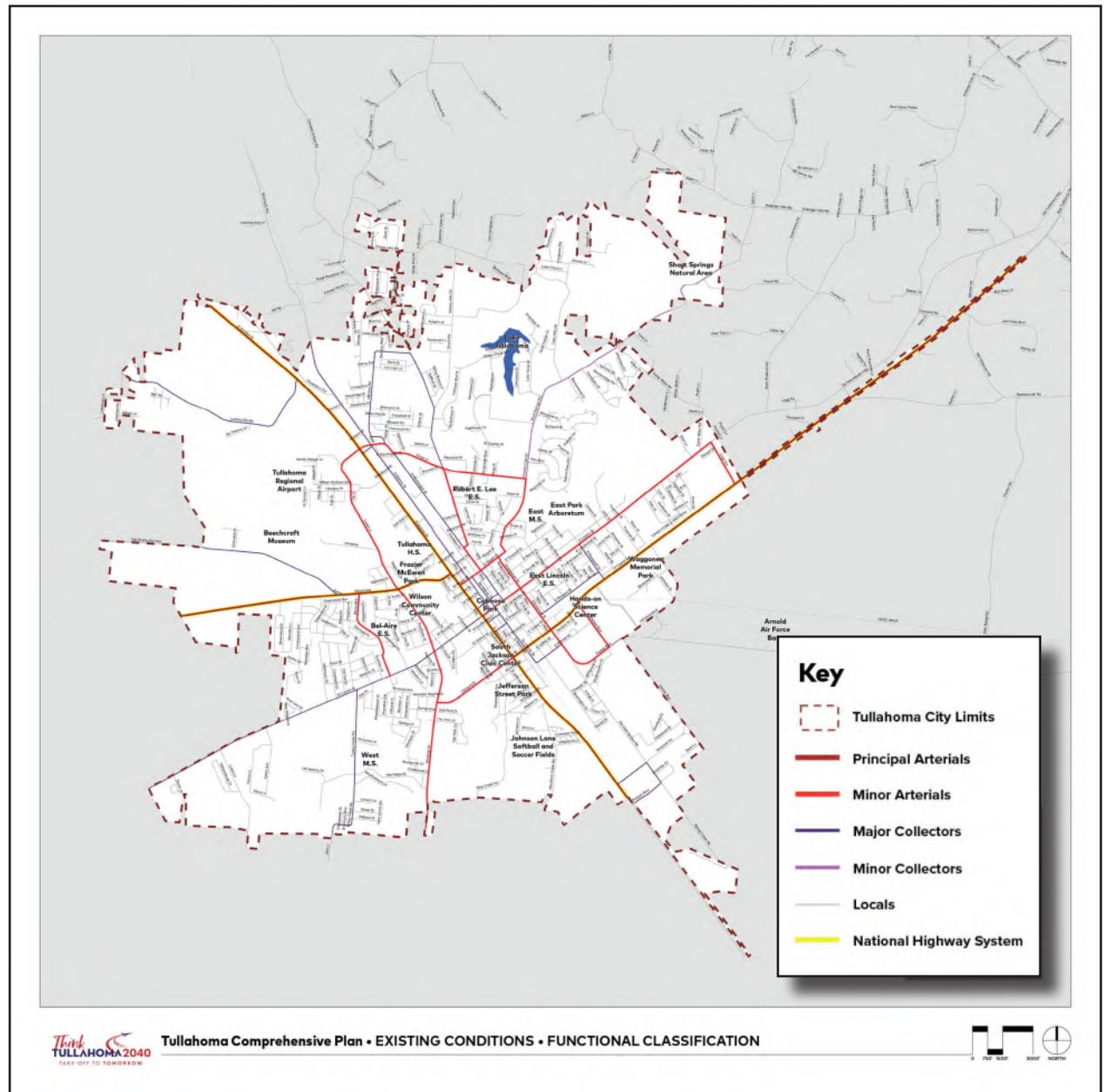
Minor Arterials also move traffic and provide access to centers, but with less mobility than a principal arterial.

Major Collectors provide a balance of access and circulation between areas of higher densities. These act as critical corridors for collecting vehicles from local streets and distributing them to higher-order roadways.

Minor Collectors are similar, but often provide access to areas with lower densities. They typically have lower speeds with fewer traffic signals than major collectors.

and
Local Roads & Streets carry the lowest levels of traffic.

Of Tullahoma's existing 180 miles of roadway, the mileage breakout by general categories is 16% arterial roadways, 14% collector roadways, and 70% local roadways.



BUILT FEATURES: ROADWAY TRAFFIC VOLUMES

Why Roadway Traffic Volumes are Relevant

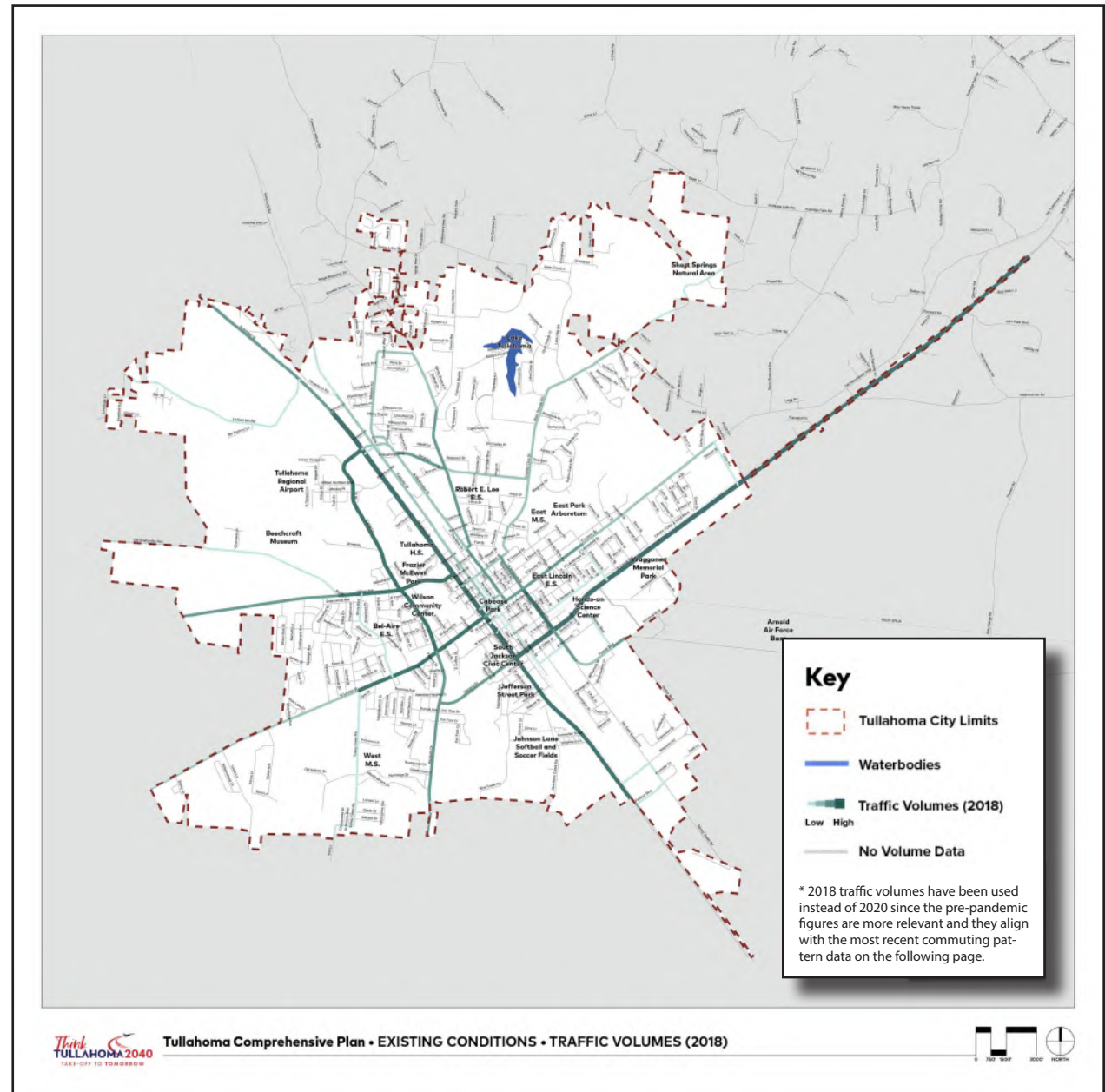
Existing traffic volumes are important to understand for any comprehensive planning project so that necessary expansions of the existing transportation system can be identified. In particular, analyzing volume trends over time can be instructive for planning purposes.

Tullahoma's Existing Roadway Traffic Volumes

As expected, volumes are heaviest along Tullahoma's east-west principal arterial, Jackson Street, the linear commercial spine of the community, as well as along New Manchester Highway/SR-55, which connects Tullahoma to Manchester and I-24. The 2018* volumes range from approximately 15,300 vehicles per day (vpd) to 22,300 vpd. Principal arterials providing connectivity to Tullahoma's south side generally have lower volumes given the prevalence of residential uses, as well as fewer regional attractors and generators south of town.

Cedar Lane, a minor arterial, provides a critical east-west alternative to Jackson Street, carrying between 9,400 vpd and 10,750 vpd. Ovoca Road, Anderson Street, Westside Drive, and Lincoln Street are also important roadways, which connect residential areas to the town's key commercial and civic destinations. These roadways generally carry between 5,000-7,500 vpd with upwards of 9,500 vpd (North Anderson Street).

Minor arterials and major collectors in and around Downtown generally carry lower traffic volumes, as compared to similarly classified roadways given the grid-like street pattern, which better disperses vehicles.



EXISTING CONDITIONS

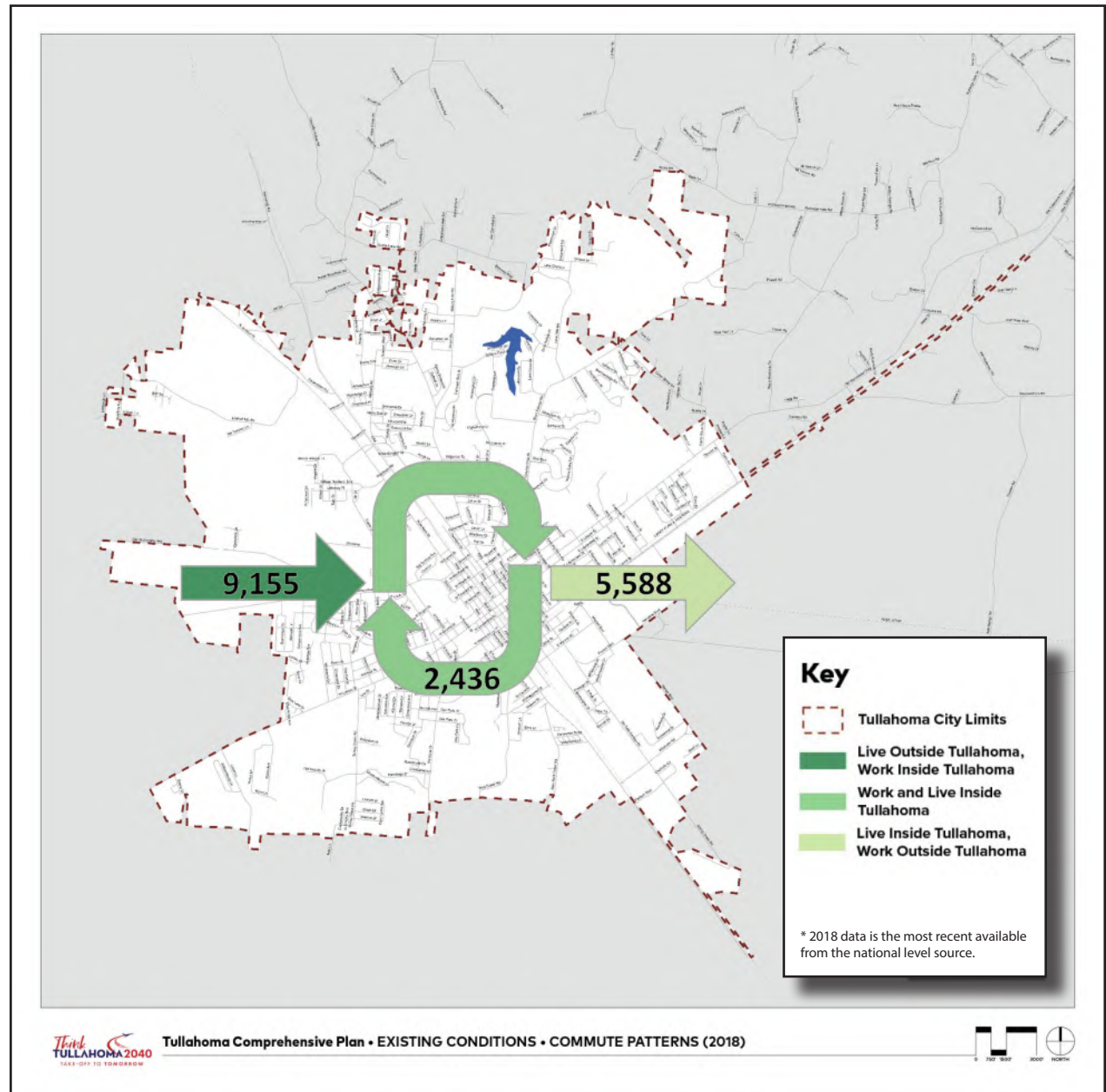
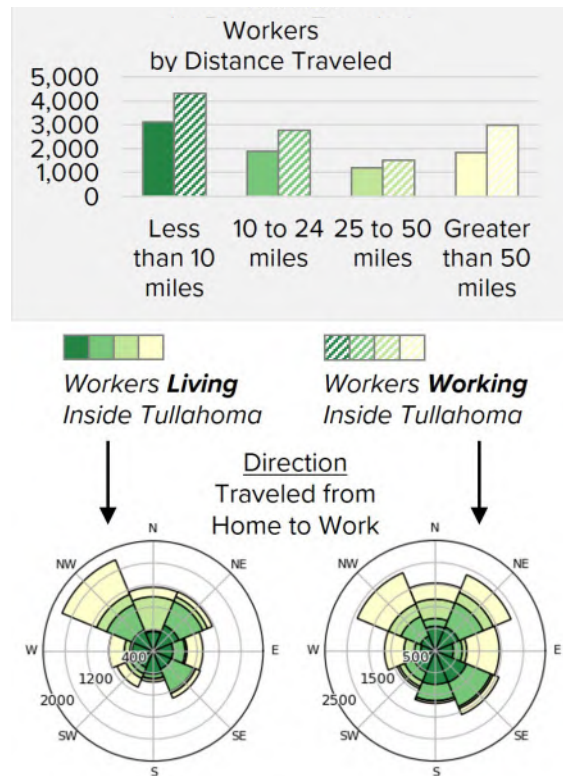
BUILT FEATURES: COMMUTING PATTERNS

Why Commuting Patterns are Relevant

Commuting patterns are important because they directly impact traffic volumes and patterns. The more people that commute to or from a community, the greater the traffic volumes. Commuting also has economic ramifications, as addressed on [page 21](#).

Tullahoma's Commuting Patterns

In 2018*, of the 11,591 people working in Tullahoma, 21% of them live in town. The map and graphs explain more.



BUILT FEATURES: ALTERNATIVE MODES OF MOBILITY

Why Alternative Modes of Mobility are Relevant

Motorized vehicles as a mode of transportation can bring several negative impacts. They add wear and tear to roadways, they use up non-renewable energy, they cause air pollution, and they are expensive to own, maintain and insure. Pedestrians and bicyclists obviously avoid those impacts. While motorized transit, such as buses, can bring those same impacts, a single vehicle can serve multiple people, so each person's negative impact is less.

Tullahoma's Alternative Modes of Mobility

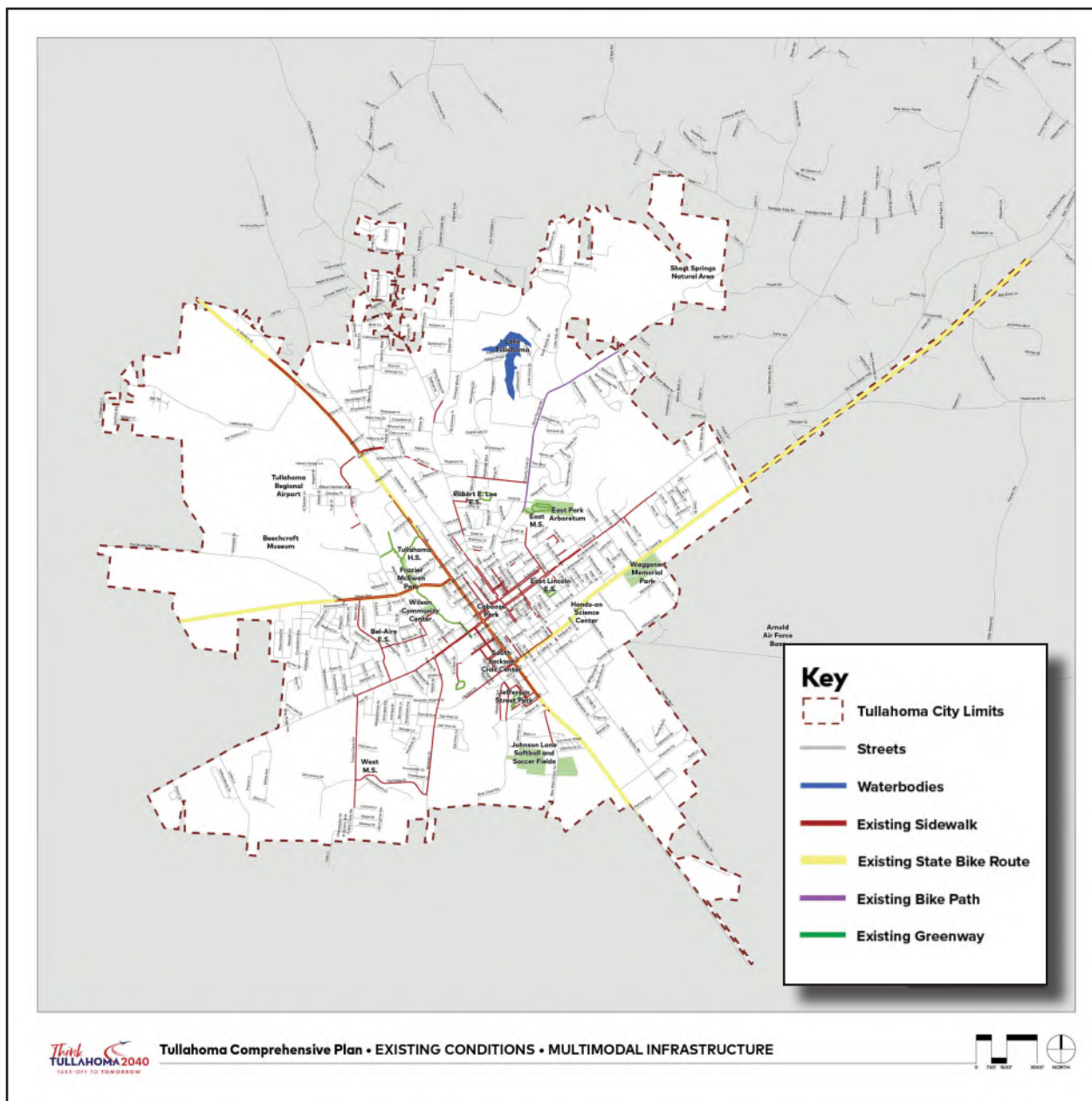
The four key alternative modes of transportation include:

Sidewalks: There are approximately 31 miles of sidewalk in Tullahoma (Source: City of Tullahoma).

Bike Routes: There are two designated state bicycle routes (i.e., signed shared roadways) traversing Tullahoma, while there is one existing asphalt bike path totaling roughly 2 miles (Source: TDOT and City of Tullahoma).

Greenways: The primary greenway is the Rock Creek Greenway, but there are also small isolated greenways associated with parks and schools and configured as loops.

Transit: The Coffee County Rural Public Transportation service is supported by state and federal funding and coordinated through the South Central Tennessee Development District (SCTDD). This on-demand service operates only on weekdays, there are no age limits or disability requirements, reservations are required, medical appointments are given priority, and round-trip service within Tullahoma is \$4 per trip.



EXISTING CONDITIONS

BUILT FEATURES: TRAFFIC CRASHES

Why Traffic Crashes are Relevant

Traffic crashes are a problem to be avoided. They result in traffic congestion and road shutdowns when they occur, costly damage to vehicles requiring repairs or even full replacement, physical injuries to those involved, and sometimes even death. By studying the characteristics and trends of crashes, problem locations can be identified and recommendations can be provided for improving the safety of such areas.

Tulahoma's Traffic Crashes

Between 2016 and 2020, there were approximately 2,800 crashes reported to the police. Crashes had the following characteristics:

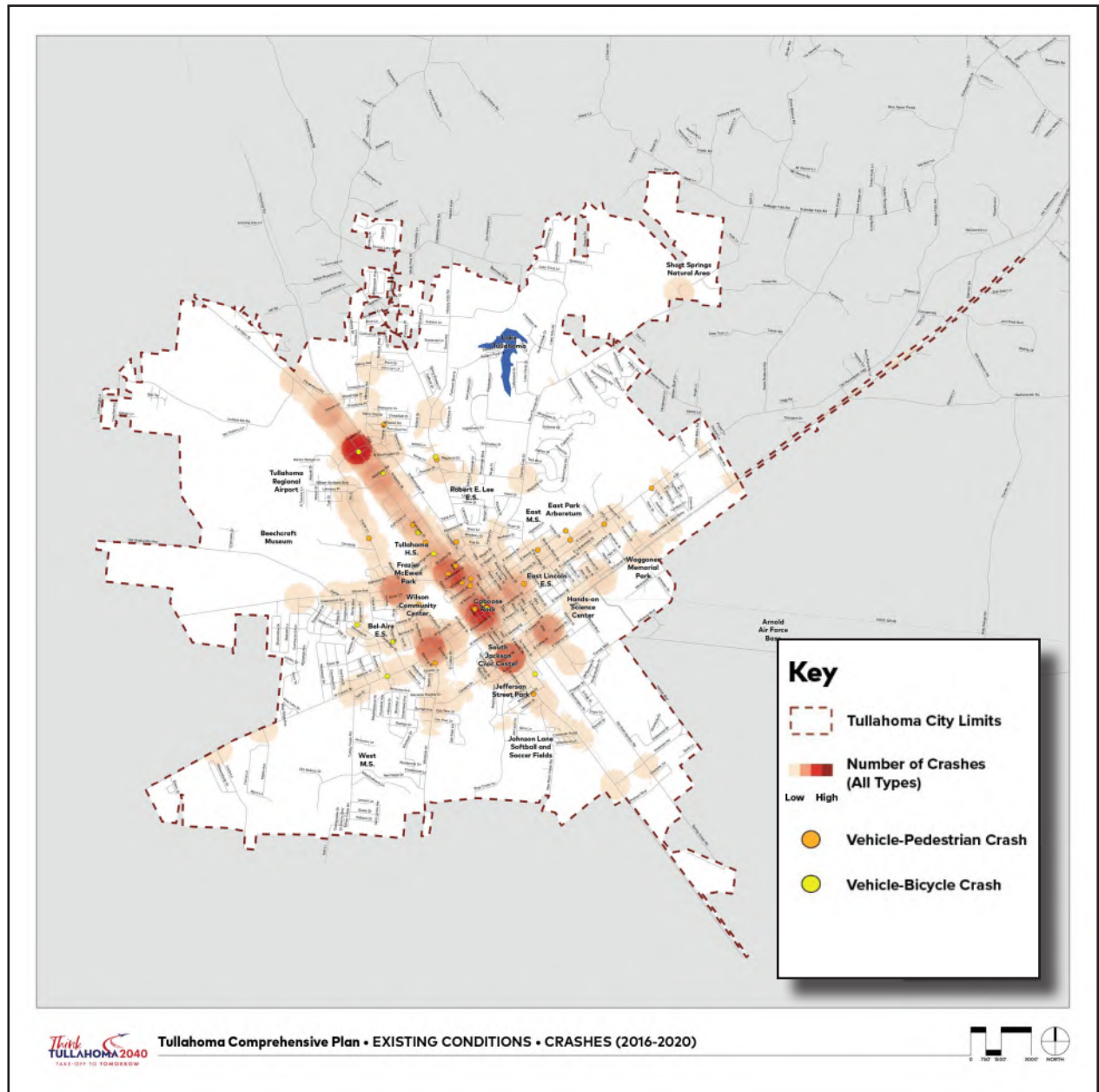
Crash Types

- Rear-end: 32%
- Angle: 25%
- No collision with vehicle (e.g., ditch, tree, etc.): 21%
- Sideswipe: 13%
- Other/unknown: 7%
- Head-on: 2%

Crash Location

- At an intersection: 70.5%
- Along a segment: 29.4%
- Ramp/railroad crossing: 0.1%

The overall number of crashes trended downward over the last five years, as did those involving pedestrians or bicyclists (who experienced a total of 34 crashes). Of those involving people on foot or bike, one was fatal, and four resulted in an incapacitating injury.



BUILT FEATURES: UTILITIES

Why Utilities are Relevant

Utilities include services such as public sewer and water, electricity, gas and telecommunications. These services are critical to the functioning of any community, and their availability can greatly impact a community's growth.

Tullahoma's Existing Utilities

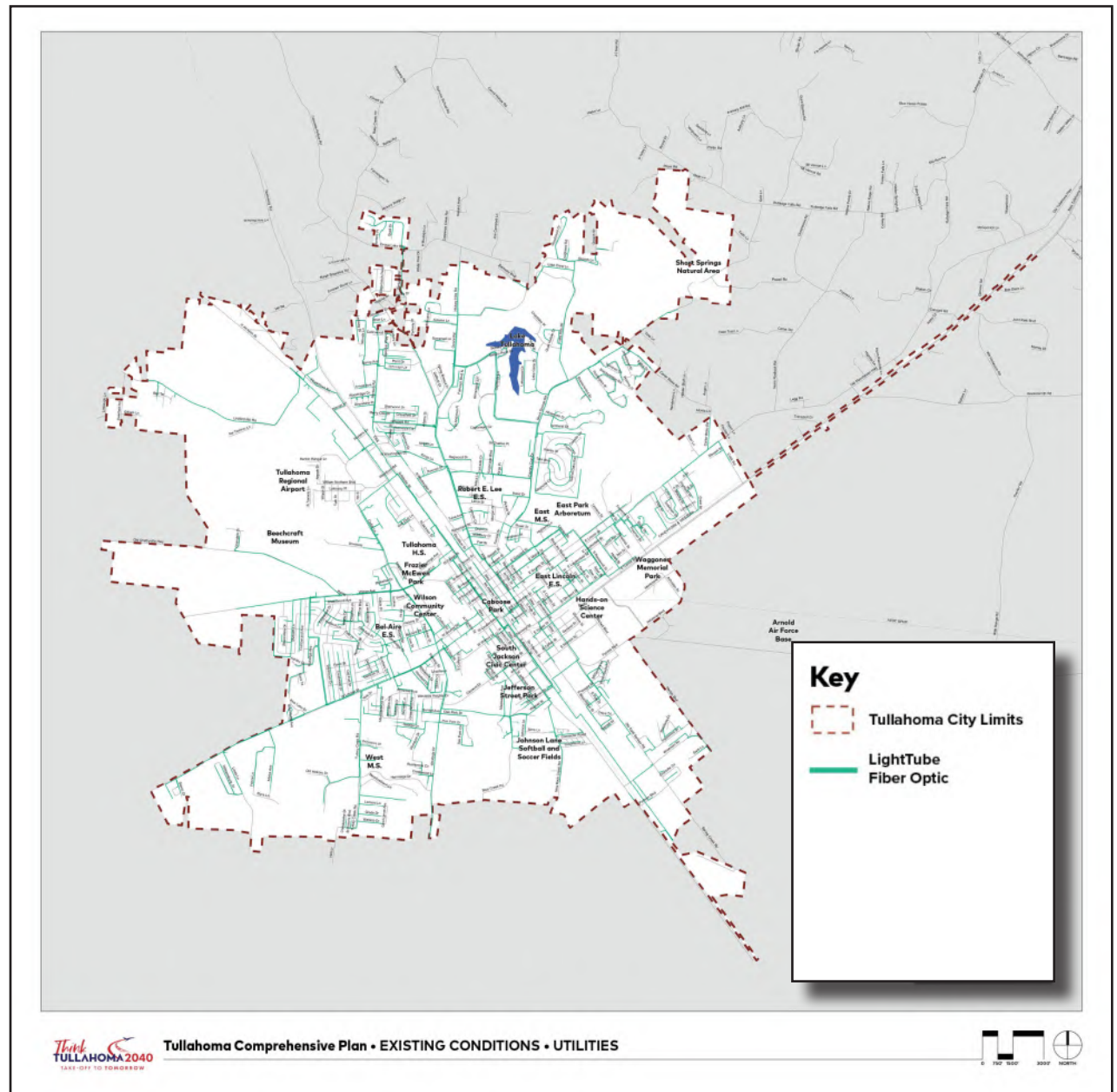
Sewer: The Tullahoma Utilities Authority (TUA) serves a large percentage of Tullahoma's acreage with sewer. The system consists of 200 miles of sewer line, 42 lift stations, and a wastewater treatment plant.

Water: Normandy Lake serves as Tullahoma's water source, which TUA purchases from the Duck River Utility Commission. A system of 270 miles of water mains serves 10,500 customers who consume approximately 3 million gallons each day.

Electricity: TUA is a distributor for the Tennessee Valley Authority (TVA), providing 11,000 customers with reliable, public power. Over 250 miles of distribution lines and two 161 kV substations make up the system.

Telecommunications: TUA's fiber-optic division, LightTube, provides television, internet, and telephone through a fiber-optic system across the city. In 2013, Tullahoma became a "gigabit city," providing affordable and fast internet that is significantly faster than the average broadband speed in the U.S.

Gas: The Elk River Public Utility District (ERPUD) provides natural gas to Coffee and Franklin Counties, serving around 17,000 customers.



EXISTING CONDITIONS

BUILT FEATURES: COMMUNITY FACILITIES

The map at right illustrates the location of the various facilities listed below.

Public Schools

1. Tullahoma High
2. East Middle
3. West Middle
4. Bel Aire Elementary
5. East Lincoln Elementary
6. Jack T. Farrar Elementary
7. Robert E. Lee Elementary

Emergency Services

1. Tullahoma Police Department
2. Tullahoma Fire Department Station #1
3. Tullahoma Fire Department Station #2
4. Coffee County Emergency Medical Service - Carroll
5. Coffee County Emergency Medical Service - Ovoca

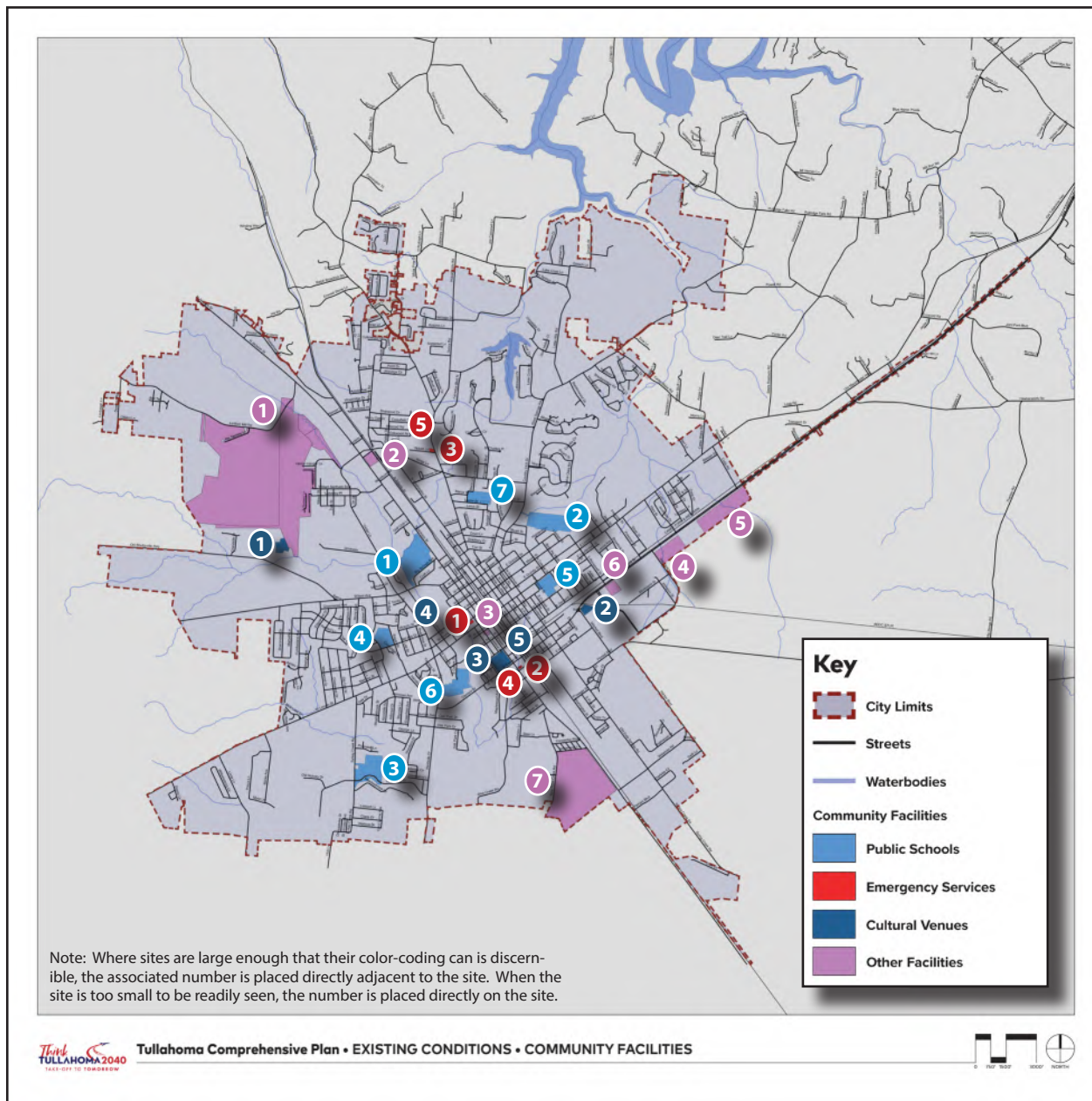
Cultural Venues

1. Beechcraft Heritage Museum
2. Hands-On Science Center
3. South Jackson Civic Center and Mitchell Museum
4. Coffee County Lannom Library
5. Tullahoma Fine Arts Center

Other Facilities

1. Tullahoma Regional Airport
2. Vanderbilt Tullahoma - Harton Hospital
3. U.S. Postal Service Office
4. Tullahoma Barracks Complex
5. Tennessee Army National Guard
6. Tennessee Army National Guard Maintenance
7. Tennessee Correctional Academy

Facilities such as community centers, parks and recreational facilities are addressed on the next two pages.



BUILT FEATURES: and COMMUNITY CENTERS & PARKS

Tulahoma is fortunate to have a range of City-operated community centers and parks. Below is an overview of those facilities, all of which are mapped on the following page.

Community Centers

The City operates two community centers, as summarized below.

- A. D.W. Wilson Community Center: Located at 501 N. Collins Street, this center was built in 1975 and was renovated in 2009. It features a fitness room, several meeting rooms, a dance studio, a multipurpose room, a gymnasium, and both indoor and outdoor pools. The fitness room includes treadmills, stair climbers, stationary bicycles, recumbent bicycles and rowing machines. Currently, regular programs include SilverSneakers®, Aerobics, and Yoga.
- B. C.D. Stamps Community Center: This center is located at 810 S. Jackson Street on the site of the former Davidson Academy. It has a gymnasium, fitness room, and two meeting rooms. The Fitness Room features treadmills, stair climbers, stationary bicycles, recumbent bicycles and rowing machines.

and Parks & Related Facilities

The City operates 11 parks and related facilities, which are described below.

1. Cascade Park: This park is located at 500 N. Collins Street along Rock Creek and across from D.W. Wilson Community Center. Little League Baseball has been played on the two fields located in the park since the early-1950s. A trailhead of the Rock Creek Greenway is located in Cascade Park.
2. East Park Arboretum and Sunrise Rotary Disc Golf Course: Located at 908 Country Club Drive, this park is adjacent to East Middle School. The disc golf course currently has 18 holes and will soon feature 27 holes. A paved walking trail includes an outdoor fitness equipment area and connects to the Russell Nelms Bike Trail along Country Club Drive. East Park Arboretum is a "Level 2" arboretum that features over 60 varieties of trees.
3. Imagination Station: At 509 W. Hogan Street, this park is located across Hogan Street from D.W. Wilson Community Center. It was the largest community-built playground

in Tennessee when it was constructed in the late-1980s, and it features a new large pirate ship play set and a sand box.

4. Frazier McEwen Park: This heavily-visited park at 216 Big Springs Avenue includes the Rotary Rocket Playground and is the venue for the Rock Creek Outdoor Concert Series, the Haunted Hayride, and the Great Candy Cane Hunt. The playground features a rubberized surface and Dream Tullahoma's aerospace rocket theme. Other amenities include two covered pavilions, a playground, restrooms, and a trailhead for the Rock Creek Greenway.
5. Jefferson Street Park: Located at 817 S. Jefferson Street, this park features newly refurbished outdoor basketball courts, a picnic pavilion, a playground, horseshoe pits, a walking track, and restroom facilities.
6. Johnson Lane Recreation Area: This park opened in 2000 at 251 Johnson Lane. It has three regulation softball fields, four full-size soccer fields, restrooms and a concession stand. It hosts multiple youth soccer leagues, Tullahoma Girls Softball, and the Motlow Ladybucks Soccer Team.
7. Rock Creek Greenway: The primary greenway in Tullahoma, it consists of an eight-foot wide, ADA-compliant paved path with bridges, benches, and picnic tables. It can accommodate walkers, joggers, roller bladders and cyclists. Built in three phases, it now covers over 1.5 miles and has tremendous potential to be extended in the future.
8. Short Springs State Natural Area: This 420-acre property is located at 2250 Short Springs Road and features an extensive trail system. As the City's website states: "The natural area provides excellent contrast between the Highland Rim and Central Basin geology and vegetation." Key landmarks include the Machine Falls trail, Machine Falls, the Upper and Lower Busby Falls, and the Bobo Creek trail. Many area residents have expressed the need for more parking.



Short Springs State Natural Area is a much loved treasure for Tullahoma's citizens.

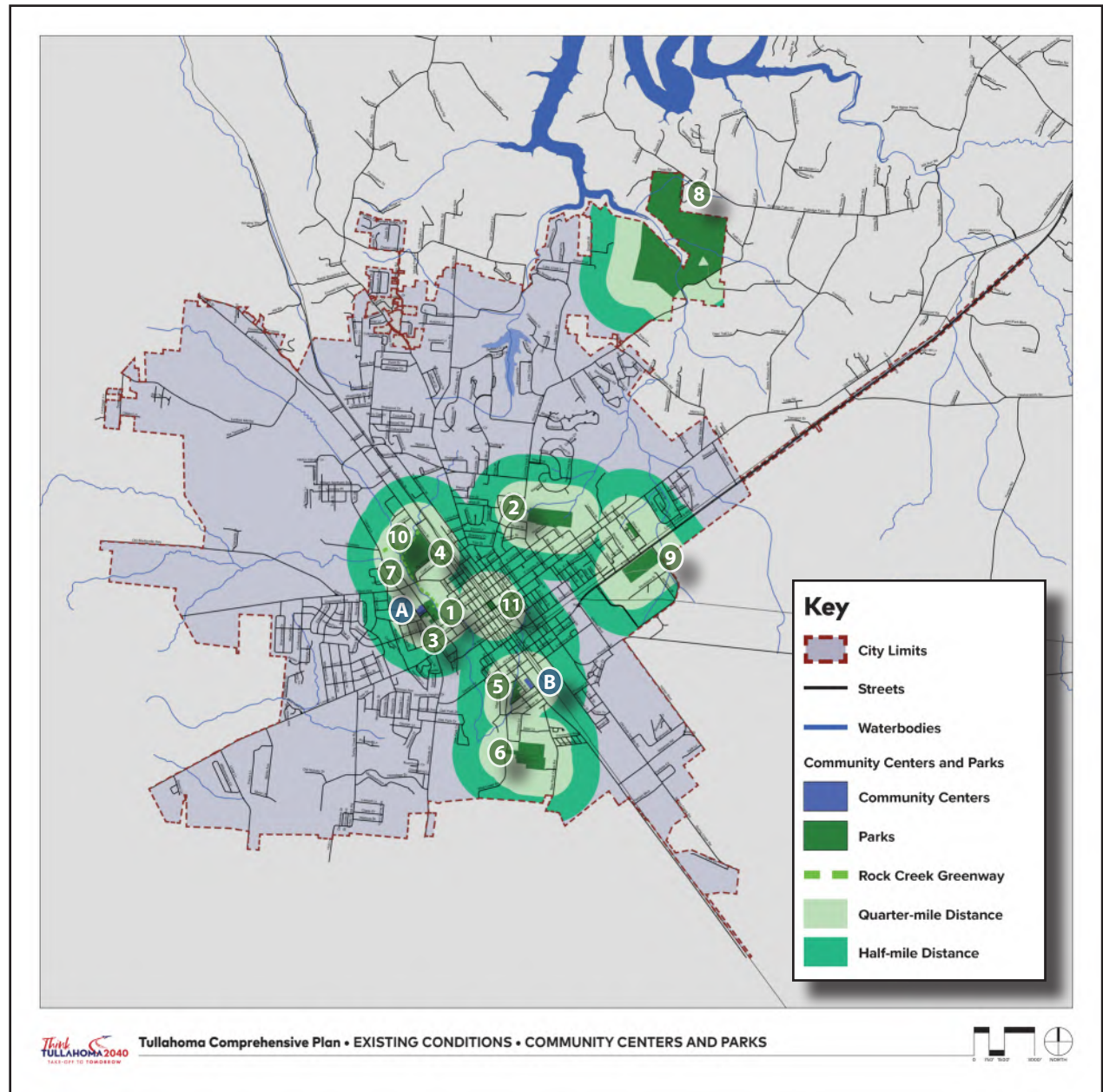
EXISTING CONDITIONS

BUILT FEATURES: and COMMUNITY CENTERS & PARKS (CONTINUED)

9. Waggoner Park: Located at 1300 E. Carroll Street, this park covers over 30 acres and features three baseball fields, a softball field, two batting cages, and a large multi-purpose field used for rugby and youth football. There are also two picnic pavilions and other shaded areas to picnic. Waggoner Park is home for Tullahoma Little League, Frank Mullins Youth Football, and the Recreational NFL Flag Football league.
10. Grider Stadium: This sporting facility is located on Big Springs Avenue behind Tullahoma High School (THS), and it was moved from North Alabama and reassembled here in 1962. It hosts a variety of events and is the home of the THS baseball team, the Tullahoma Adult Baseball League, and a 4th of July celebration attracting over 10,000 people from the region.
11. History (Caboose) Park: Located at 103 N.E. Atlantic Street, it is adjacent to the railroad tracks in Downtown. It opened in 2007 as a space for passive activities such as picnicking, and it features a 1964 L&N Railroad caboose, a veterans memorial, and historic interpretation. It is located where the original Tullahoma depot stood until World War II.

and Planned Parks & Improvements

In addition to these existing parks and facilities, the new Silver Street Park has been planned to include a playground, basketball courts, restrooms and pavilions. There are also planned improvements for Johnson Lane Park and Waggoner Park.



Socio/Economics: DEMOGRAPHICS

Key Demographic Characteristics

Tullahoma's key demographic characteristics include:

- *There has been modest population and household growth in the past decade.* The population has grown by 9.6% and households have grown by 7.6%.
- *There has been substantial income growth since the economic recession.* In the last decade, household incomes have increased by 8%.
- *Tullahoma has a relatively high poverty rate at 18.3%.* It compares to 15.3% statewide and 10.5% nationally.
- *Of citizens 25 or older, 25.1% have a college degree.* That compares with 27.3% statewide and 32.2% nationally.

Commutation Patterns

Although this issue was addressed previously on [page 14](#) from a transportation perspective, it is addressed here from a demographic and economic perspective.

Commuters Coming to Tullahoma for Work

79% of Tullahoma workers commute in from:

- Lynchburg
- Winchester
- Manchester
- Shelbyville
- Nashville
- Murfreesboro

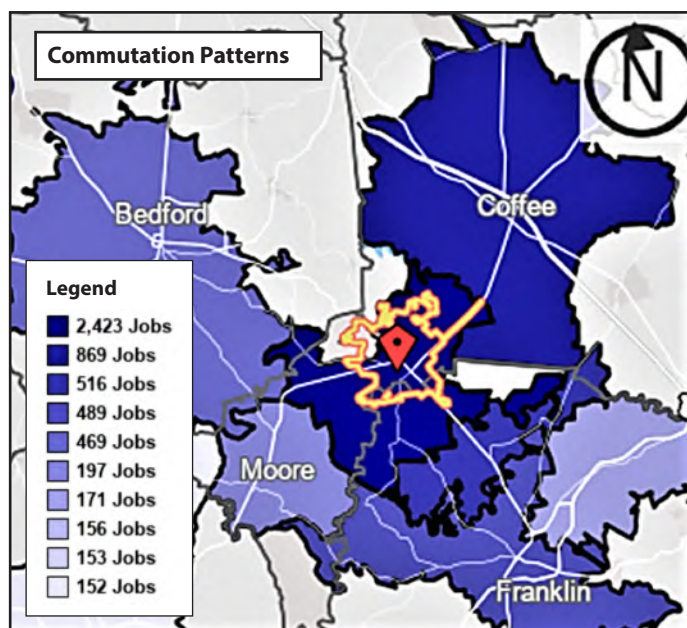
Residents Leaving Tullahoma for Work

69% of Tullahoma residents commute to the following communities for work:

- Manchester
- Winchester
- Shelbyville
- Murfreesboro
- Nashville
- Smyrna

Table. DEMOGRAPHIC TRENDS, TULLAHOMA AND MSA, 2010-2019/20				
Factor / Area	2010	2019-20	2010-2019 Change	
			Number	Percent
Population				
Tullahoma	18,561	20,339	1,778	9.6%
T-M MSA *	99,664	107,124	7,460	7.5%
Households				
Tullahoma	7,508	8,079	571	7.6%
T-M MSA *	39,015	40,564	1,549	4.0%
Household Income				
Tullahoma	\$ 45,139	\$ 48,770	\$ 3,631	8.0%
T-M MSA *	\$ 47,122	\$ 51,361	\$ 4,239	9.0%
Note: Income expressed in constant 2020 dollars.				
Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.				

* Tullahoma-Manchester Metropolitan Statistical Area



Population Over Time

Tullahoma, unlike many smaller communities across the country today, has watched its population steadily grow. Many communities have seen their populations shrink during the past few decades as people move to larger cities. The following summary of Tullahoma's population growth over time is derived from various sources, but primarily the US Census Bureau.

Year	Population	Change
1860	586	NA
1870	589	0.5%
1880	1,083	83.9%
1890	2,439	125.2%
1900	2,684	10.0%
1910	3,049	13.6%
1920	3,479	14.1%
1930	4,023	15.6%
1940	4,549	13.1%
1950	7,562	66.2%
1960	12,242	61.9%
1970	15,311	25.1%
1980	15,800	3.2%
1990	16,761	6.1%
2000	17,994	7.4%
2010	18,655	3.7%
2020	20,339	9.0%

EXISTING CONDITIONS

Socio/Economics: ECONOMIC BASE

Key Economic Characteristics

Tullahoma has a relatively diverse economic base, with about 12,000 jobs among its various industries. Arnold Air Force Base - Headquarters for the Arnold Engineering Development Complex (AEDC) is the major driver for the local economy, employing 1,736 military personnel, Defense civilians, and (primarily) private contractor personnel. In addition, TVA estimates that AEDC generates another 1,198 secondary jobs in construction, retail and other industries in the area economy. The total economic impact of AEDC is estimated at \$680.2 million in FY2020. Since AEDC is not located within the City limits of Tullahoma, these employment figures are not included in economic data for the city. However, the base has long had an outsized impact not only on the local economy, but on the local culture and the city's image in the region.

Leading Sectors:

- Health Care
- Retail
- Prof/Tech
- Manufacturing
- Accommodation

Major Employers: **Vanderbilt Tullahoma-Harton Hospital**

- AEDC, ~~Vanderbilt~~ T&E Connectivity, Cubic Transportation Systems, JSP, WISCO Envelope Corporation, Schmiede Corporation, Sonoco, ~~Micro Craft~~, Coca Cola, Tennessee Apparel

Employment Trends

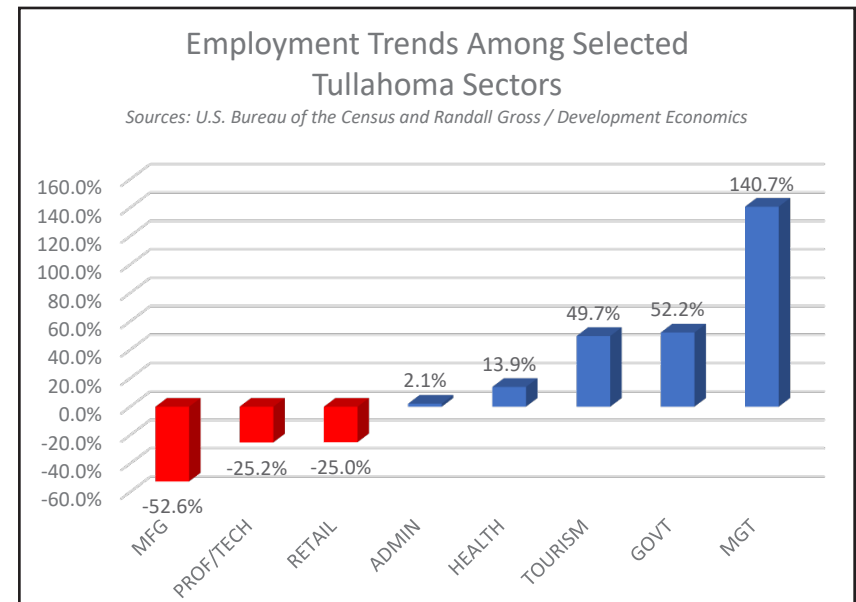
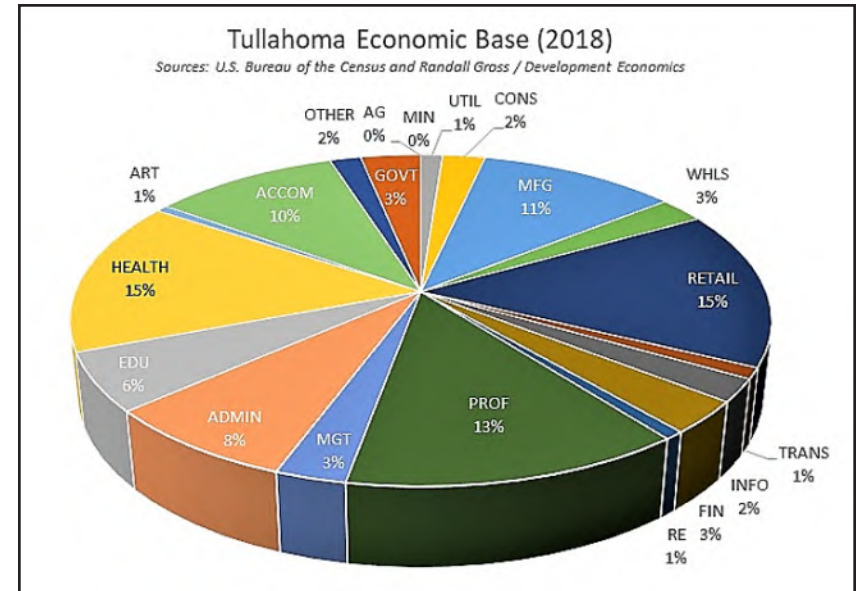
Job Losses

- Lost 2,530 jobs since 2002
- Falling share of Micro Area
- Lost 1,390 manufacturing jobs

Job Growth

- Management
- Tourism
- Health Care
- Administration
- Government

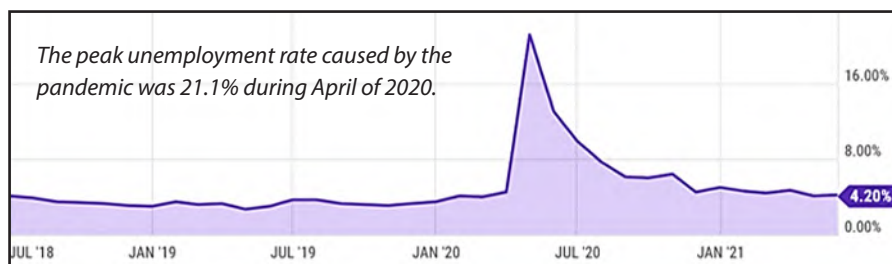
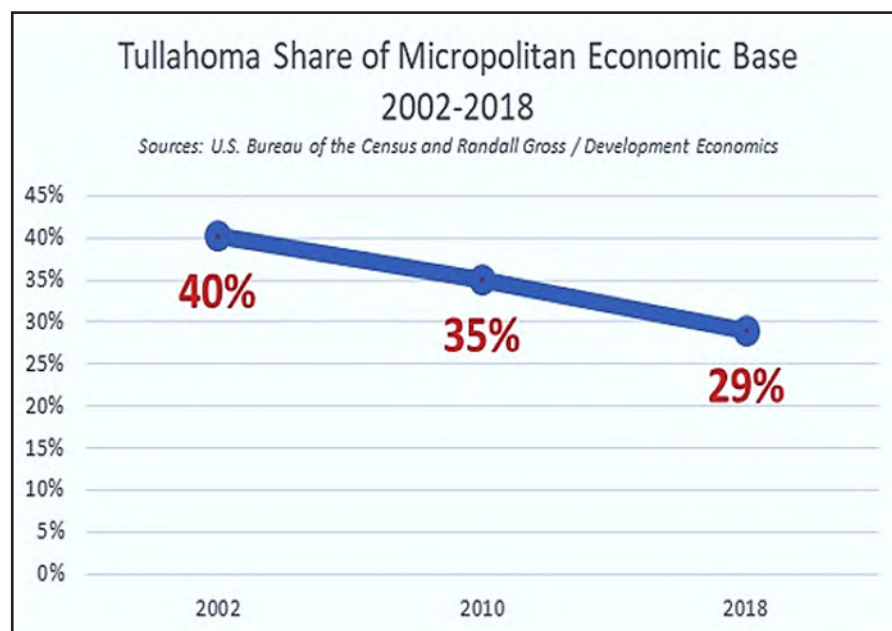
More information on this topic can be found in *Appendix B* of this report - *Economic Baseline Assessment*.



Socio/Economics: ECONOMIC BASE (CONTINUED)

Recent Pandemic Impacts

During the COVID-19 Pandemic, Tullahoma (like the country and the world as a whole) felt sudden economic dislocations that resulted in the unemployment rate skyrocketing from about 4.0% to 21.0% within the period of one month. Since that time, unemployment has fallen precipitously and has returned to pre-Pandemic rates.



and

Arnold Air Force Base & AEDC

As described previously on [page 5](#), the Arnold Engineering and Development Complex (AEDC) was established in 1951. As the most advanced and largest complex of flight simulation and test facilities in the world, AEDC operates 58 aerodynamic and propulsion wind tunnels, rocket and turbine engine test cells, space environmental chambers, arc heaters, ballistic rooms and other specialized units, of which 27 are unique to the United States and 14 are unique in the world. It continues its operations today as part of the United State Air Force Material Command and has been the test and evaluation facility for aerospace and aviation through the Cold War, the Space Race, and the War on Terror. It remains the area's largest employer. As such, below are some of its key economic benefits to Tullahoma and the broader region:

- AEDC has a \$680 million impact on the area's economy per 2020 data.
- AEDC has 1,736 employees, including 1,256 private contractors.
- AEDC has resulted in 1,198 secondary jobs.
- Other aerospace strengths for the Tullahom area include the Tullahoma Regional Airport, the University of Tennessee Space Institute, and the Beechcraft Heritage Museum. The museum was established in 1973 as the Staggerwing Museum and was renamed in 2007. It is a 60,000 square foot facility currently housing more than 35 aircraft.



Photos Source: US Air Force



EXISTING CONDITIONS

Housing Market

Key Housing Statistics

Where percentage changes over time are reflected below, they are relative to the 2010 housing statistics.

Housing Units Overview

- Total units: 8,823
- Units built since 2014: 388
- Single-family units: 87% (+10%)
- Multi-family units: 13% (-8%)

Existing Housing Tenure

- Owner-occupied units: 60% (-8.7%)
- Rental units: 40% (+16.4%)

Existing Vacancy Rates

- Owner-occupied units: 0.5% (was 3.6%)
- Rental units: 9.6% (was 5.5%)

and

Existing Rents & Values

- Median rent: \$758 (+25%)
- Median value: \$146,500 (+21%)

2021 House Sale Trends*

- Number of sales: 40
- Average days on the market: 38
- Median house sale price: \$235,134

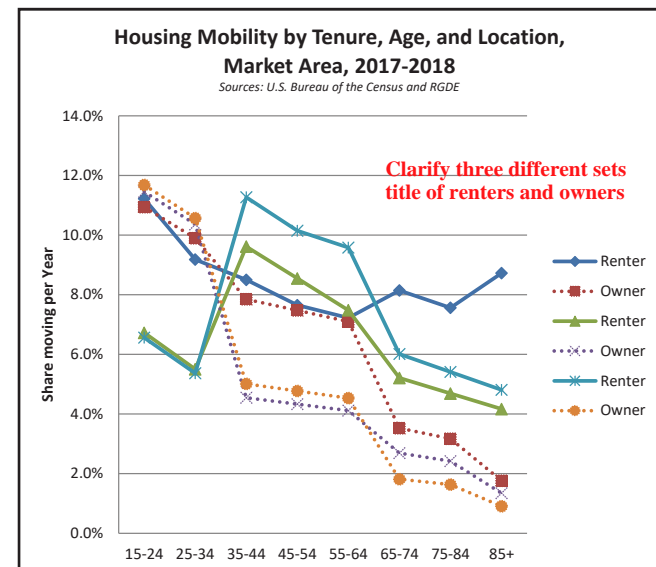
* Source: Redfin

See Appendix C: Housing Market Analysis for more details on this topic.

Units in Building	2010	2019	2010-2019 Change Number	Percent
1-Detach	6,295	6,697	402	6.4%
1-Attach	171	180	9	5.3%
2-4	510	789	279	54.7%
5-9	453	505	52	11.5%
10-19	161	134	(27)	-16.8%
20-49	194	249	55	28.4%
Mobile/Other	453	269	(184)	-40.6%
TOTAL	8,237	8,823	586	7.1%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			



Age Cohort	Renters	Owners	Total
15-24	30	11	41
25-34	(1)	(1)	(2)
35-44	24	36	60
45-54	(15)	(35)	(50)
55-64	(35)	(115)	(150)
65-74	92	316	408
75-84	12	55	67
85+	13	21	34
TOTAL	119	289	408
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		



HOUSING MARKET (CONTINUED)

Key Findings

As noted on the previous page, the details of the Housing Market Analysis can be seen in *Appendix C: Housing Market Analysis* of this plan. Below are key findings regarding market potentials for housing:

Rental Housing Development Potentials

The market analysis accounts for the competitive context and determined that *there will be potential for development of roughly 220 to 400 additional affordable and market-rate rental units within the city of Tullahoma by 2026*. This number includes up to 200 market-rate units, but only if certain conditions are met to leverage development. To put that in context, Tullahoma has had an average of only two units of multi-family housing permitted per year since 1995 and only two multi-family housing projects permitted at all since 2000. However, part of the reason for the lack of multi-family construction was the retirement of local builders and an exodus following the 2008-09 real estate recession. Because of the low inventory, occupancy rates are high within multi-family complexes. Area rents have increased markedly due to a lack of multi-family supply and unmet demand for high-quality rental apartments. Rising rents are pricing out many potential renters, some of whom are young workers employed in Tullahoma. Approximately 60 to 70 units would qualify for Extremely Low Income (ELI) support, with another 75 to 130 or more workforce housing units at 60 to 80% of Area Median Income. Turnover at key local employers remains an important driver for the rental housing market, but much of the rental demand is generated by local move-ups and first-time renters, local service workers, students and change-of-life households.

For-Sale Housing Development Potentials

There is potential for some 230 to 500 units of for-sale housing development in the study area, including 290 market-rate units. This demand may exceed recent construction trends that have added an average of roughly 66 units per year to Tullahoma's supply of single-family housing. Arnold Air Force Base and the hospital remain important demand drivers (7-10% of the market), but there is increasing demand generated by those relocating to the area (20-25%). Nevertheless, the largest share of demand is still generated by area move-ups (e.g., first-time buyers - 40-50%) and move-downs (empty nesters - 10-15%). Roughly 10-15% of the market is comprised of investors. There is also some move-up activity from the commuter market outside of Tullahoma. Tullahoma housing demand has increased, but supply is constrained, which helps push potential first-time and other homebuyers into secondary markets or wherever housing may be available. Approximately 40% of market-rate housing demand will be generated for homes in the \$200,000 range, but most houses being constructed in the area are listed at \$350,000 or higher. This demand does not account for needed for-purchase workforce housing for those with less than 80% of the area median income. At least 10% of existing single-family homes in Tullahoma are in poor condition, and there are vacant lots that could support infill development.

Rent Range	Area Capture		Market Rate
	Low	Moderate	
\$ 300	27	34	-
\$ 500	27	38	-
\$ 600	37	60	-
\$ 700	38	67	53
\$ 800	38	73	56
\$ 1,100	24	48	36
\$ 1,200	14	34	24
\$ 1,500	7	23	15
Sub-Total	211	378	184
ELI *	54	72	-
Workforce	75	127	-
Job Induced	-	-	-
Vacancy Factor	11	19	9
TOTAL	222	397	193
Sources:	U.S. Bureau of the Census; Claritas; Woods & Poole; and Randall Gross / Development Economics.		

* ELI stands for Extremely Low Income. It is an official designation by the U.S. Department of Housing and Urban Development for people who qualify for affordable and assisted housing, usually below 50% (and for public housing, 30%) of the Area Median Income (AMI).

Price Point	Area Capture		Market Rate
	Low	High	
\$ 106,250	11	14	-
\$ 156,250	60	86	-
\$ 218,750	52	130	91
\$ 247,500	15	31	23
\$ 288,750	(8)	(16)	(12)
\$ 367,500	108	269	188
Sub-Total	238	514	291
ELI *	11	14	-
Job-Induced	-	-	-
TOTAL	238	514	291
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

EVENT VENUE MARKET

The Event Venue Market Analysis (Appendix D) examines the potential for Tullahoma to attract meetings and events with a focus on activities that could generate revenue to the facility. Below is a summary of this report.

Existing Conditions

While a wide range of existing conditions require consideration, one key factor is below.

Competitive Meeting & Event Venues in the Region

- Holiday Inn Express & Suites - Tullahoma
- Manchester-Coffee County Conference Center - Manchester
- Rock Creek Springs Wedding Venue - Tullahoma
- Monterey Station - Cowan
- Raffin's Wedding ~~and~~ Event Barn - Hillsboro
- Bell Buckle Banquet Hall - Bell Buckle
- Microtel Inn & Suites by Wyndom - Shelbyville
- Circle E Guest Ranch - Belvidere
- Eddie's Retreat - Noah/Beechgrove
- Murfreesboro - dozens of competitive event spaces

Potential User Groups

Research was conducted to identify several hundred entities most likely to use meeting space in southern Middle Tennessee. An online survey was then designed and targeted specifically to those user groups. Over 100 individuals were identified at each of the entities for receipt of the link to the survey, and the Tullahoma Area Chamber of Commerce also distributed the link to its members. Some follow-up phone interviews were held, and data from the surveys and interviews helped determine a "propensity" rate at which potential users would utilize the facilities. The primary user groups identified for a meeting venue in Tullahoma include:

- Non-profit associations & organizations
- State government agencies & Department of Defense
- Colleges & universities
- Local-area businesses
- Wedding & event planners

Summary of User Group Potentials

Based on the various user group analyses, a Tullahoma meeting and event venue should be able to capture a target of about 120 to 150 events per year. Capacity for events accommodating at least 500 people would be required, suggesting a building footprint of at least 6,000 to 8,000 square feet of indoor space, flexible and divisible. The numbers below represent the total market potentials at full operation (within three to five years of initial marketing), not necessarily the recommended use of the facility.

<u>Events by Group Type</u>	<u>Annual Events</u>
• Associations and Nonprofit Organizations	65-70
• Weddings and Events	10-12
• Corporate	50-60
• Government Agencies	3-5
• University/Research Institutions	<u>2-3</u>
TOTAL	120-150

The target potential event schedule was also disaggregated by type of event, with fundraisers, social events, and sales meetings generating the largest number of events, followed by board and annual meetings, training sessions and workshops, and other meetings and events. There would also be several wedding-related events, as well as conferences and workshops each year.

<u>Events by Event Type</u>	<u>Annual Events</u>
• Board/Exec/Annual Meetings and Retreats	28-29
• Weddings and Events	7-10
• Conferences, Workgroups and Colloquia	3-4
• Fundraisers/Social Events	30-40
• Other Meetings and Events	10-12
• Training Sessions and Workshops	12-20
• Sales and Marketing Meetings	<u>30-35</u>
TOTAL	120-150

and PUBLIC POLICIES & ENTITIES: PLANS & STUDIES

As part of the process to prepare this Comprehensive Plan for Tullahoma, all of the key plans and studies prepared in the past decade were reviewed both to gain information and to understand the ideas proposed at the time. Those ideas still deemed viable have been adapted and incorporated into this plan, as relevant. Below is a summary of the documents, and they are organized by starting with the most recent plans and studies.

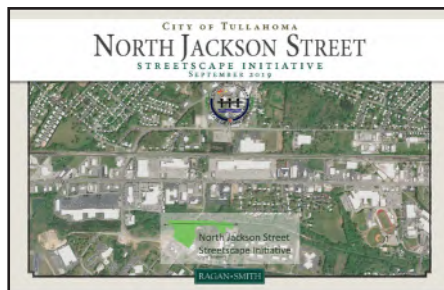
Community Mobility Plan (2019)

This TDOT-funded plan was prepared for Manchester and Tullahoma. It proposes buffered or separated bike lanes along Tullahoma's major thoroughfares, including N. Jackson St., N. Washington St., E. Lincoln St., and Cedar Ln. Bike lanes on SR-55 and Old Manchester Tullahoma Hwy. would connect the two cities. The Rock Creek Greenway would extend into the east part of town. It also proposes sidewalk extensions to fill gaps in the system and to connect activity centers, and pedestrian crossings are proposed at key locations. Finally, several roadway improvements were recommended for key corridors, many which build upon the 2013 Tullahoma Comprehensive Transportation Plan.



North Jackson Street Streetscape Initiative (2019)

The study area for this project was the roughly two-mile stretch of Jackson between Wilson Ave. on the south end and Hoover Ln. on the north end. The plan made recommendations for character areas, streetscape and street design, and adjacent private realm redevelopment. Understandably, the plan does not attempt to transform a suburban corridor into an urban corridor, but it does offer many (many what???)



to make the corridor more pedestrian friendly and attractive, including enhanced landscaping, signage and other aesthetic improvements. A series of visual simulations and precedent imagery are also included so that the public can envision changes.

National Main Street Assessment (2018)

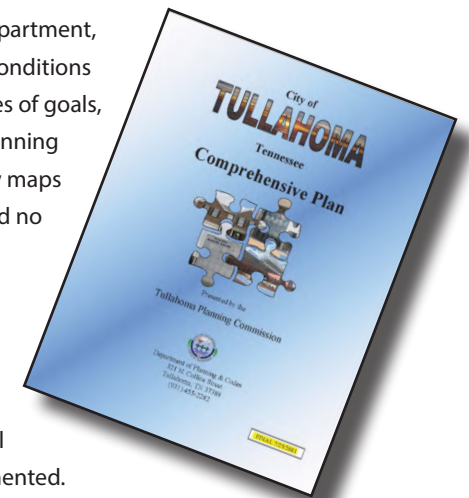
This assessment was conducted by representatives of the State Main Street program that is part of the Tennessee Department of Economic and Community Development (TNECD). The assessment document consists primarily of a list addressing Downtown's strengths, weaknesses, opportunities and threats (SWOT). An outgrowth of the assessment was the City's preparation of an application to become a designated Main Street community. The application has not yet been submitted to TNECD, as the pandemic sidetracked the effort.

Cool & Connected Strategic Plan - Downtown Broadband (2016)

This plan document, prepared by consultants, offers a strategy to provide broadband internet service to both the Downtown core and the Fine Arts District. The plan was prepared in a manner that solicited public input, and it also addresses Downtown revitalization topics not directly related to broadband service, but part of the bigger picture for Downtown Tullahoma. The plan was never formally adopted or implemented as written, although the City has since installed public internet service for the Downtown. Unfortunately, the system has not worked well and its continuation is being reconsidered.

Tullahoma Comprehensive Plan (2011)

Prepared in-house by the City's planning department, this plan features a fair amount of existing conditions analysis on the front end, followed by a series of goals, objectives and policies organized by key planning issues. Because the plan includes only a few maps (only one not tied to existing conditions) and no other graphics, it fails to paint a picture for readers of the desired future of Tullahoma. Instead, the document consists almost exclusively of text and most of that is relatively general. It also lacks an implementation section, giving it a more conceptual feel rather than being a plan that can be implemented.



EXISTING CONDITIONS

and PUBLIC POLICIES & ENTITIES: ZONING

Zoning Districts Overview

The City's current zoning ordinance was prepared by the City in-house in 2009. It has a relatively limited number of districts relative to most communities, including the following ten districts (not including overlay districts):

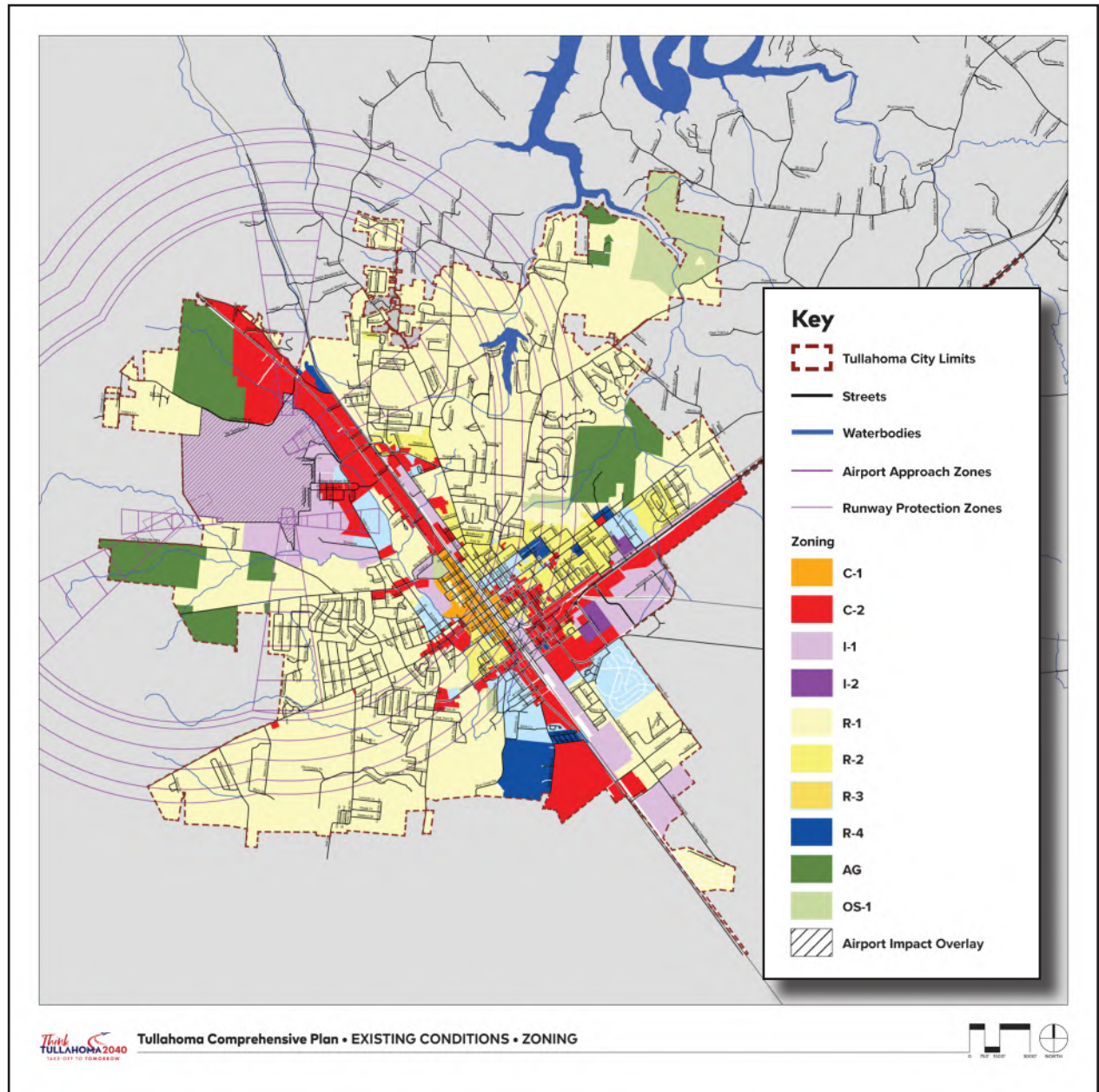
- *Agricultural (A)*: min. 5-acre lots
- *Open Space Preservation (OS-1)*: min. 2-acre lots
- *Low-Density Residential (R-1)*: min. 12,000 sq. ft. lots with sewer, and min. 20,000 sq. ft. lots without sewer
- *Large Lot Residential (R-1A)*: min. 2-acre lots
- *Medium-Density Residential (R-2)*: min. 10,000 sq. ft. lots
- *High-Density Residential (R-3)*: min. 7,500 sq. ft. lots
- *Mobile Home Park/ High-Density Residential (R-4)*: min. 7,500 sq. ft. lots
- *Central Commercial (C-1)*: no min. lot size requirement
- *General Commercial (C-2)*: no min. lot size requirement
- *Neighborhood Commercial (C-3)*: min. 5,000 to 7,500 sq. ft. lots, depending upon the use or number of units*
- *Industrial (I-1)*: no min. lot size requirement
- *Heavy Industrial (I-2)*: no min. lot size requirement

* For single-family dwellings; more space needed for more units

There are also two overlay zoning districts, one for the airport and one for floodways. The historic overlay district is addressed on the following page.

Zoning Districts Mapping

As reflected on the map at right, the vast majority of Tullahoma is zoned R-1. The C-1 district is concentrated in the Downtown, while C-2 is very linear along Jackson St. and E. Carroll St. I-1 is primarily in the SE and NW sectors of town, while AG and OS-1 are peripheral and in the north.



and PUBLIC POLICIES & ENTITIES: OTHER DEVELOPMENT REGULATIONS

Subdivision Regulations

Adopted in 2018 and with subsequent revisions, key issues for the Subdivision Regulations include:

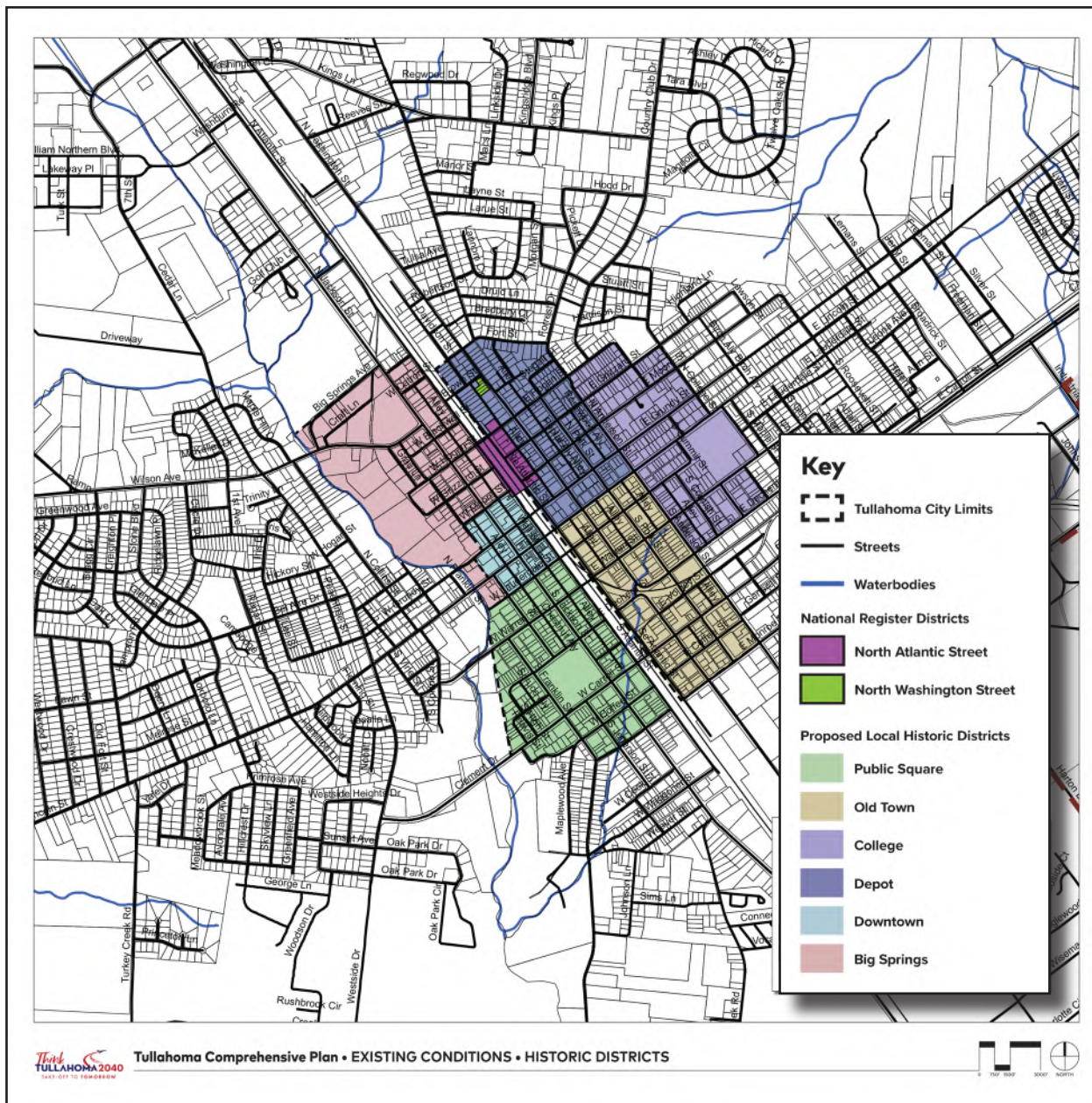
- *Street Type Standards:* There are only three types of streets design options - local, collector and arterial streets, which is very limiting.
- *Alleys:* There are no provisions for alleys for narrow-lot subdivisions, which can result in “garagescape.”
- *Sidewalks:* They are required for both sides of arterials and collectors, as well as on one side of all new major subdivision streets.
- *Street Trees:* Although the City does have landscaping regulations, there are no street tree requirements.

Floodplain Regulations

The City’s regulations and processes meet the minimum requirements per State and Federal agencies for development and floodplain management. Additional details relating to flood hazard reduction, such as the use of green infrastructure and flood-proofing structures, could be strengthened. There are also no incentives for floodplain dedication with construction, a tool used by some cities.

Historic Zoning

Tullahoma has two National Register (NR) Historic Districts (see map at right). While NR designation offers financial incentives, it provides no protections, as would local districts. The map at right shows local districts that have been proposed in the past. Section 408 of the Zoning Ordinance has provisions for designating and regulating local districts, but none have been designated yet.



and PUBLIC POLICIES & ENTITIES: ECONOMIC DEVELOPMENT POLICIES

Economic Development Policies

Tulahoma offers several economic development incentives, including Payment In-Lieu-Of Taxes (PILOT), Industrial Revenue Bonds (IRBs), and loans. The City also offers a Single Point-of-Contact program marketed as a “One-Stop Shop” to help “Fast Track” application and permitting processes or access to City services. The Tulahoma Area Economic Development Corporation (TAEDC) and its partners work with prospective companies on site selection, data collection, workforce development, and assistance with the approvals and permitting process. TAEDC publishes a guide to starting a business in the city, and it provides other guidance to incoming and expanding businesses.

PILOT Program

The PILOT program enables new and expanding companies to enter into a lease-back arrangement with TAEDC in order to reduce the tax burden for qualified projects generating large capital investments, significant employment, and high wage rates. The City can apply PILOTs on a case-by-case basis to industrial and commercial real property, as well as to personal property.

Tax-Exempt Bonds

TAEDC and the Coffee County Industrial Development Board (IDB) can issue tax-exempt bonds in order to finance manufacturing and other qualified industrial facilities. The bonds can be used to finance the acquisition of land, buildings, or equipment. Bond rates are determined based on the financial strength of the company.

Loan Programs

The City can also offer small business loans and access to the Rural Small Business and Entrepreneurship Loan Fund. A Commercial Revolving Loan Fund, originally funded through Urban Development Action Grants (UDAG) at 4% below prime, and Small Business Revolving Loan Fund (funded through the U.S. Department of Agricultural Rural Development Administration at 4% below prime) are available to assist with small business financing and development. Eligibility for loan funds is contingent, in part, on levels of employment generated.

Economic Development Entities

There are several local, state, and federal entities engaged at various levels in the Tulahoma area’s economic development. TAEDC is a primary point of contact for economic development incentives and services offered by the City of Tulahoma. The Coffee County and Franklin County IDBs offer financing through IRBs (discussed previously) for industrial development in Tulahoma. A list of these entities includes the following, among others:

City of Tulahoma Agencies, Authorities, and Committees

- Tulahoma Area Economic Development Corporation (TAEDC)
- City of Tulahoma Tourism Committee
- Tulahoma Airport Authority
- Tulahoma Utilities Authority
- Dream Tulahoma Committee

and Coffee & Franklin County Agencies

- Coffee County Joint Industrial Development Board
- Franklin County Industrial Development Board

Tennessee State Agencies

- Tennessee Department of Economic & Community Development

U.S. Federal Government Agencies

- Tennessee Valley Authority
- USDA Rural Development
- Appalachian Regional Commission (Coffee, Franklin)

and Training & Educational Institutions

- Motlow State Community College
- University of Tennessee Space Institute
- Tulahoma City Schools

Non-profit Agencies

- Tulahoma Area Chamber of Commerce
- South Central Tennessee Development District
- Southern Middle Tennessee Entrepreneur Centers
- Tulahoma Sports Council
- South Central Tennessee Tourism Association (SCTTA)

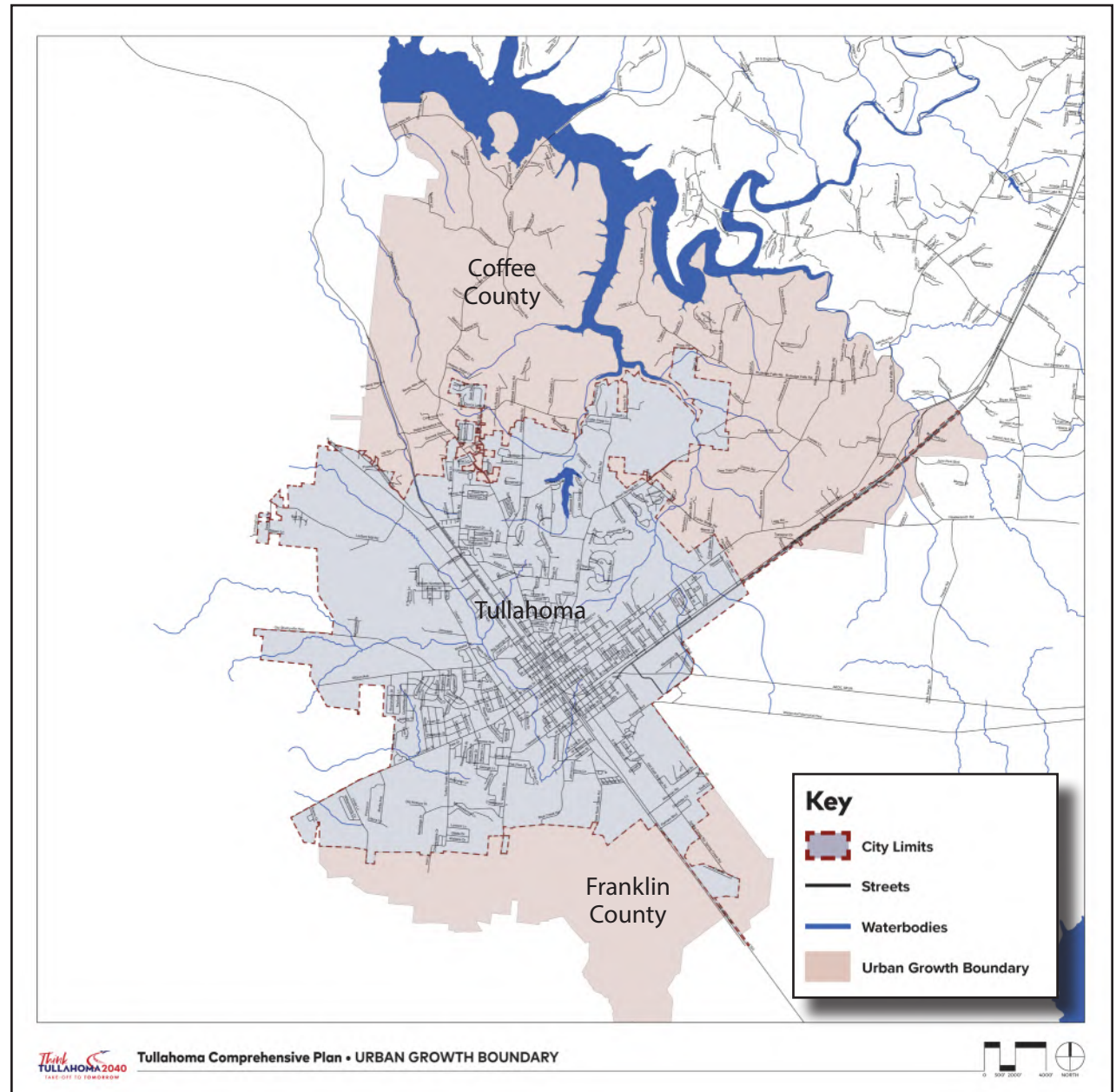
and
PUBLIC POLICIES & ENTITIES:
URBAN GROWTH BOUNDARY

Overview of UGB Legislation

Adopted in 1998, Public Chapter 1101 requires each county to develop a comprehensive growth plan in co-operation with the municipalities in its borders. County's are tasked with directing future urban growth into municipally-designated Urban Growth Boundaries (UGBs) and non-municipal county Planned Growth Areas (PGAs). Rural areas are designated for agriculture, recreation, forest and other low-density uses. Ironically, the law's intent was to reduce suburban sprawl, but the actual result has often been to encourage sprawl. The growth plans do not expire, and there is also no requirement to update them. One of the primary reasons for establishing growth plans, to define where cities could annex by ordinance without consent, has since been eliminated. However, there are still several ways growth plans determine where annexation and incorporation can occur. No city can annex territory in another's UGB, and new cities can only incorporate within planned growth areas. UGBs also delineate cities' planning and zoning authority outside city limits in counties where cities have been granted that authority.

UGB's Application for Tullahoma

Tullahoma participates in this process in both Coffee and Franklin counties, as the City's UGB impacts both. The City has been granted subdivision regulation authority and Planning Commission review authority for both of its designated UGBs, but not zoning regulation authority. As the map at right shows, Tullahoma's designated growth areas are north and south of the current city boundaries.



EXISTING CONDITIONS

PUBLIC POLICIES ^{and} & ENTITIES: ENTITIES

Although there are numerous organizations that will play into the preparation and implementation of this Comprehensive Plan, some of the primary ones are summarized here.

City of Tullahoma

- Board of Mayor ^{and} & Aldermen (BOMA):** As the City's governing body, they will vote on many issues relevant to the plan, including zoning and funding for various projects.
- Project Steering Committee:** This diverse 13-member group consists of various citizens who represent a range of interests and perspectives to help guide this project.
- Planning Commission:** This seven-member commission manages land use and development within both the city limits and the UGB. Members include the Mayor (or a person appointed by the Mayor) and an Alderman.
- Board of Zoning Appeals:** This body is empowered to grant variances from the Zoning Ordinance regulations to permit land owners a reasonable use of their land in instances where there are exceptional and unusual circumstances. There are seven members.
- Board of Adjustments ^{and} & Appeals:** This three-member board decides on appeals of decisions made by the Building Official relative to the application and interpretation of codes for the demolition or repair of buildings. It meets only when needed.
- City Departments:** In addition to the various decision-making bodies listed above, the most significant departments relative to this Comprehensive Plan include



Tullahoma's Mayor and Board of Aldermen will play a key role in adopting and implementing this new Comprehensive Plan.

Graphic Source: City of Tullahoma

Planning and Codes, Parks and Recreation, and Public Works.

Coffee County – Mayor ^{and} & County Commission

- Public Works - Highway Department:** This County department maintains roads and bridges listed on the County's "Road List," including paving, patching and mowing. The department is not responsible for State, City and other facilities not on the list.

Franklin County – Mayor ^{and} & County Commission

- Planning ^{and} & Zoning Department:** This department addresses all planning and development issues in the county, so the City of Tullahoma will need to coordinate with them.
- Highway Department:** This County department maintains roads and bridges under the direction of the Highway Superintendent. It is led by the four-member Franklin County Highway Commission, which is organized by eight districts.

Regional Agencies

- South Central Tennessee Development District (SCTDD):** The SCTDD is an association of 35 municipal and 13 county governments organized to advocate and promote economic and community development within the region. It provides technical assistance, planning, and general staff support and to help local governments and other groups develop projects and activities. SCTDD is governed by a 53-member Board of Directors, which includes a 24-member Executive Committee.
- Appalachian Regional Commission (ARC):** The ARC is an economic development partnership agency of the Federal government and 13 State governments focusing on 420 counties across the Appalachian Region, including Coffee County. ARC's stated mission is to "innovate, partner, and invest to build community capacity and strengthen economic growth within its jurisdiction..." In particular, the ARC can be a good source of grant funding for various community projects in municipalities such as Tullahoma.

FUTURE BUILD-OUT SCENARIO

Purpose of a Future Build-Out Scenario

The purpose of this exercise is to establish a point of reference for Tullahoma's current zoning. Although citizens may see a generous amount of undeveloped green space in town, that may not be what they will have in the future. It must be assumed that, over time, growth will continue and the community's current policies - zoning and development regulations - will eventually be realized to at least some degree. Once this existing point of reference is understood, alternative growth scenarios can be considered. *It is critical to keep in mind that market demand will ultimately drive future growth*, but this exercise will at least highlight where significantly too much or too little land might be zoned for various land uses.

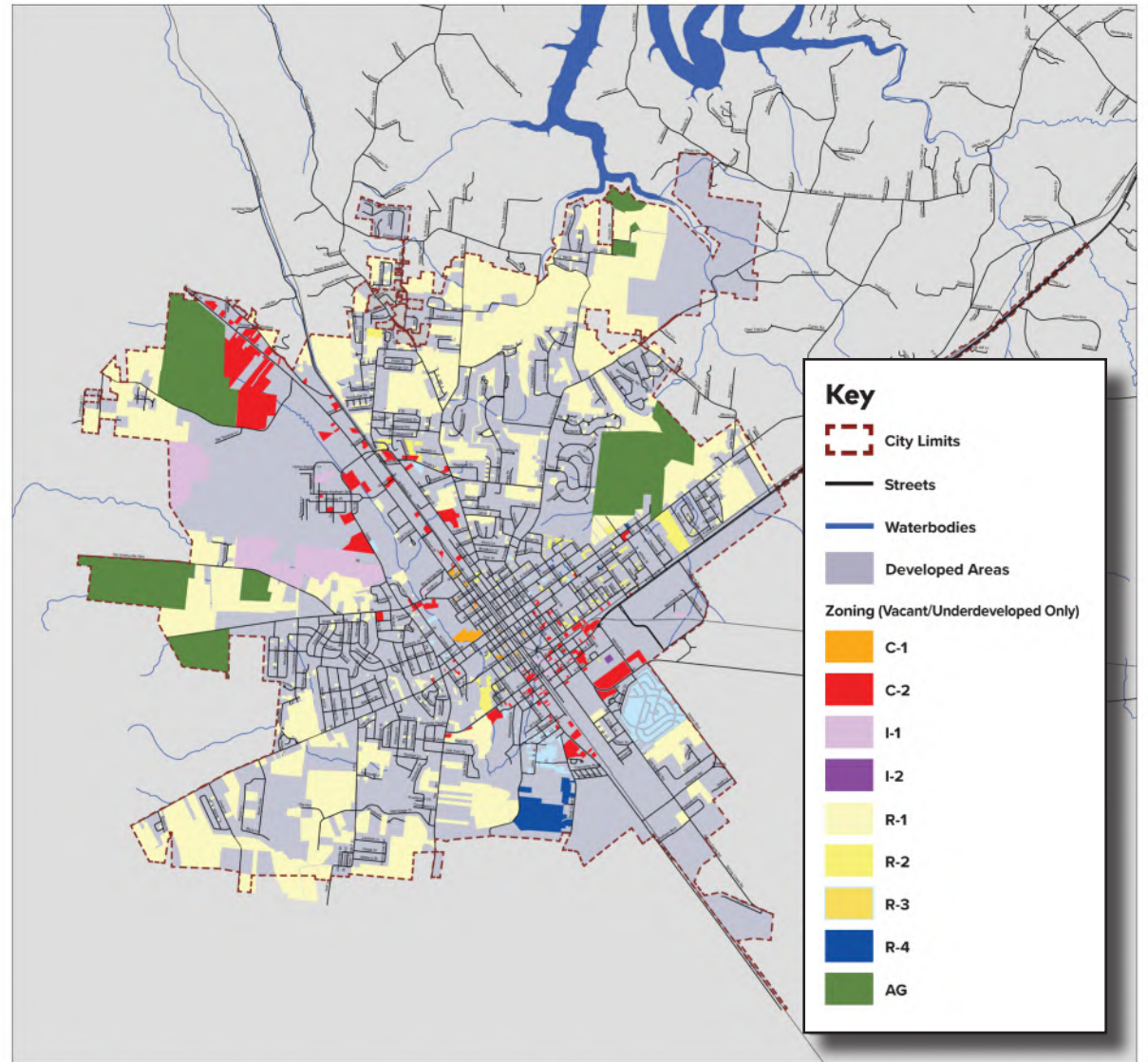
and

Existing Development & Population

The first step in determining a future build-out scenario is to account for existing development and populations. Based upon the most current Census data, the following statistics will be considered:

- Current Population: 20,339
- Total Households: 8,079
- Average Residents Per Household: 2.51

Build-out scenarios sometimes address commercial and industrial development, but that cannot be addressed here because of a lack of data on such existing space. Therefore, this analysis will focus on Tullahoma's residential population.



EXISTING CONDITIONS

FUTURE BUILD-OUT SCENARIO (CONTINUED)

Potential Development ^{and} Population Per Zoning

The map on the previous page illustrates undeveloped and underdeveloped land that has potential for development (natural constraints such as flood hazard areas and steep slopes may reduce the buildable area in the table below). It shows such areas in light of the existing zoning. The matrix below projects the potential development yields by considering the undeveloped and underdeveloped areas by zoning district, eliminating the undevelopable ROW areas, and then calculating development based on density standards per zone. For zoning districts allowing various types of uses and development, the most dense likely scenario is being used. While land zoned OS-1 does actually exist, because it is park land and will never be developed, it is shown as 0 acres. Finally, although the Neighborhood Commercial (C-3) zoning district allows both commercial and residential uses, there is no way to predict what ratio of such uses might be developed. Therefore, since the future potential residential population that the existing land policies might yield is so significant, an all-residential scenario has been used for the C-3 district. However, since 0 acres are currently zoned for this district, it is a non-issue until C-3 zoning actually occurs.

Future Build-Out Scenario Results

Land Use	Existing Units / Sq. Ft.	Potential Units / Sq. Ft.	Total Future Build-Out
Residential	8,823 housing units	14,576 housing units	23,399 housing units

Zone	Total Area (Acres)	Undeveloped & Underdeveloped Areas (Acres)	% of Land Undeveloped	Developable Land Minus ROW Areas - 15% (Acres)	Housing Units or Building Sq. Ft. Permitted Per Acre (maximum)	Housing Units or Building Sq. Ft. Yield (maximum)
A	1059.3	1037.1	97.9%	881.53	0.20	176.31
OS-1	418.8	0.0	0.0%	0.00	0.50	-
R-1	7813.1	3540.0	45.3%	3008.99	3.63	10,922.64
R-1A	0.0	0.0	0.0%	0.00	0.50	-
R-2	561.9	99.9	17.8%	84.89	4.35	369.27
R-3	520.5	166.2	31.9%	141.30	14.50	2,048.78
R-4	211.6	85.9	40.6%	73.02	14.50	1,058.72
C-1	107.0	17.7	16.5%	15.05	160,000.00	2,408,560.00
C-2	1310.2	337.5	25.8%	286.87	8,712.00	2,499,180.95
C-3	0.0	0.0	0.0%	0.00	14.50	-
I-1	1473.8	306.4	20.8%	260.45	8,712.00	2,269,027.33
I-2	52.7	2.2	4.2%	1.90	8,712.00	16,513.60
Total	13529.0	5592.9	NA	4754.0	NA	NA

Implications of Future Build-Out Scenario Results

Again, this build-out scenario is based purely on existing land use policies and not future market demand. Market demand for residential development is addressed elsewhere in this plan document. Below are key implications of this build-out scenario.

^{and} Housing & Population Yields

Tullahoma's current 8,823 residential units houses a population of 20,339. Using the existing figure of 2.51 people per unit, the potential new 14,576 units could result in an additional 36,586 residents. Combining the current housing units and population with the existing zoned potential based upon zoning would result in a total of 23,399 housing units and a population of 58,731 residents. That population would be 2.9 times the current population or nearly triple the current population.

Comparison with Housing Market Analysis

According to this project's housing market analysis, there will be potential for development of roughly 220 to 400 additional rental housing units in Tullahoma by 2026. There is also potential for 230 to 500 units of for-sale housing. Thus, the total projected market demand for the next five years is between 450 and 900 housing units of all types, which would result in approximately 1,107 to 2,214 new residents. By comparison, the build-out potential for new housing per the existing zoning, which is tied to no particular time horizon, is 14,576 units and roughly 36,586 new residents.

Conclusions

The City's current zoning features much more residentially zoned land than will be needed to satisfy market demand for many years to come.

CLIMATE CHANGE

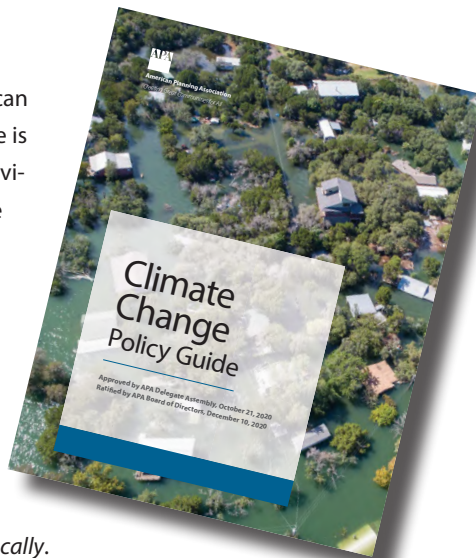
The Issue

The following is an excerpt from the “Climate Change Policy Guide” (page 3) prepared by the American Planning Association in 2020, and it summarizes the issue clearly and concisely:

“Climate change is the most consequential worldwide environmental event that human civilization has had to confront. The scientific consensus that climate change is being largely driven by humans has long been clear, and it has also now been well established that the long-range impacts of that change will have major implications for human civilization and all life on earth. As documented in the recent work of the Intergovernmental Panel on Climate Change and the U.S. Global Climate Research Program, those impacts (coastal and low-lying inundation, severe health impacts from extreme heat and air quality deterioration, endangerment of life and property through extreme weather events, etc.) will have very negative consequences for many people, especially minority and lower-income communities. The planning community has the obligation and the opportunity to use its planning processes, skills, and knowledge to help reduce the severity of those impacts, and to help humanity adapt swiftly, intelligently, and equitably to their negative consequences.”

The Science

In a NASA-published document, the American Association for the Advancement of Science is quoted saying “Based on well-established evidence, about 97% of climate scientists have concluded that human-caused climate change is happening.” The basis for climate change is the fact that a significant portion of the world’s energy production and use involves burning fossil fuels, which produce the majority of Greenhouse Gas (GHG) emissions. GHGs are driving most of the changes to the earth’s climate, which prompts the old adage, *think globally, act locally*.



Implications for this Plan

Over the past few years, the community planning profession has placed a much greater emphasis on planning for sustainability and resiliency, which includes avoiding development that contributes to climate change and mitigating the negative impacts of climate change.

Avoid Contributing to Climatic Change

Development that is climate-friendly is very consistent with “smart growth” planning principles that have been well-entrenched in the US for decades now. Examples of approaches intended to minimize the use of motorized vehicles that burn fossil fuels, thereby minimizing GHGs, include the following:

- Encouraging mixed-use compact development patterns for increased walkability.
- Expanding bike-ped facilities to accommodate walking, cycling and similar modes.
- Requiring the installation of charging stations for electric-powered vehicles.

Coping with the Impacts of Climatic Change

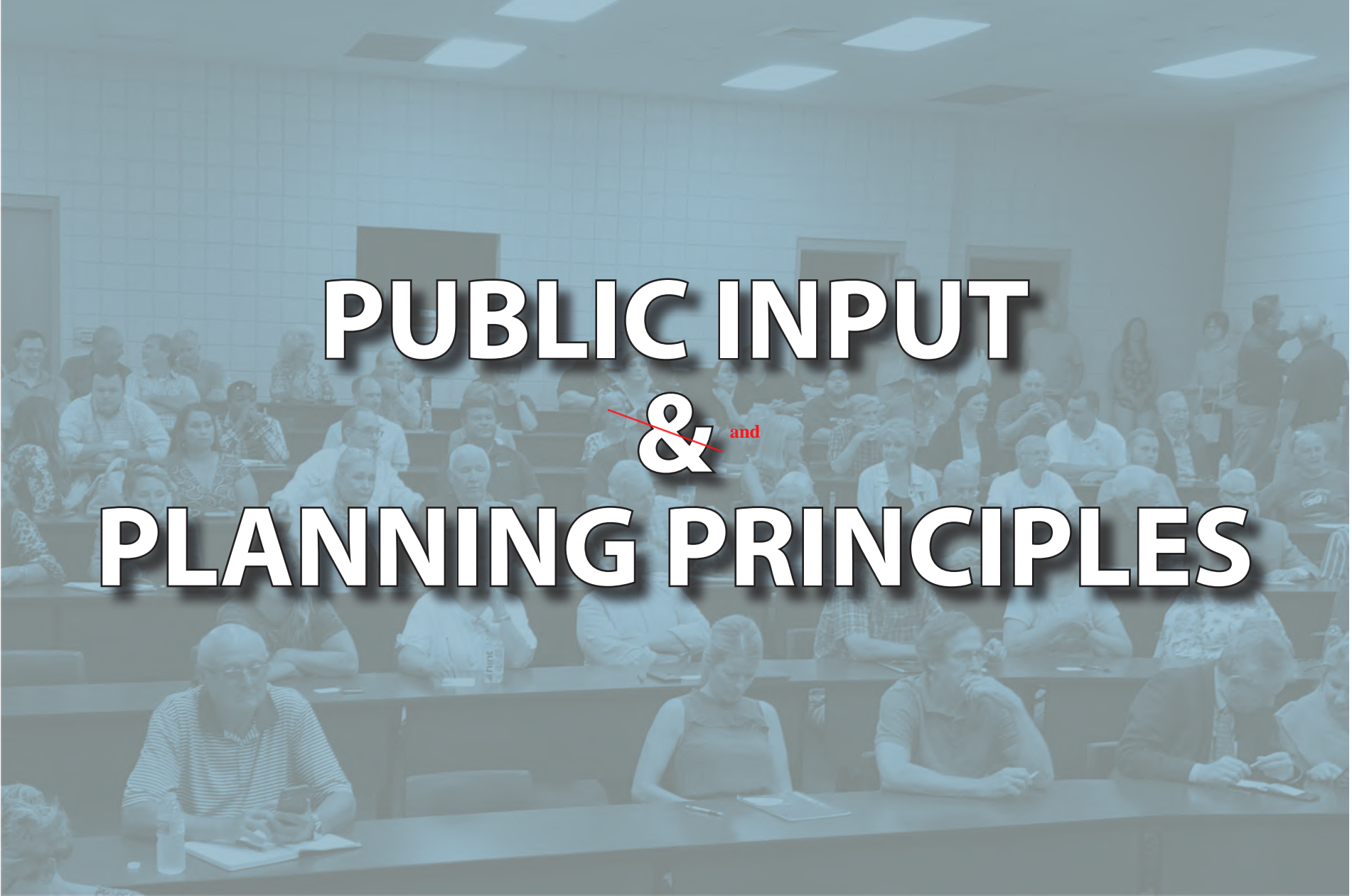
The other side of the coin is figuring out how to avoid the negative consequences of climate change, particularly those tied to natural disasters caused by dramatic weather events. The most significant threat for a location such as Tullahoma is flooding triggered by excessive rainfall, in addition to year round air pollution and excessive heat levels during the summer months. Examples of tools intended to combat the impacts of climate change include:

- Stormwater and floodplain regulations that avoid development in flood-prone areas.
- Preservation of the existing tree canopy through tree preservation regulations that prohibit clear cutting of development sites.
- Requirements for planting trees on sites that are developed, including street trees for subdivisions and shade trees in parking lots.
- Encouraging or requiring “green infrastructure” to avoid too much piping and storage of stormwater, such as through the use of bio swales and rain gardens.
- Preservation of wetlands that function as a sponge for floodwaters and as a liver to filter pollutants from stormwater.

The recommendations portion of this plan will seriously consider all of these issues.



Tullahoma Comprehensive Plan



PUBLIC INPUT & and PLANNING PRINCIPLES

Sample Meeting Comments

"Recent changes in the Codes Department have been an improvement. Some builders want to build more diverse housing - smaller and affordable - but the City has been oriented toward large-lot single family houses."

"We need more shopping. It's too limited now. We need more local restaurants like the ones currently in Downtown."

"Tulahoma could use more recreation facilities. The west side of town has more than the east side. The greenway system needs to be expanded."

"There's a great need for more sidewalks connecting to schools, as well as other places."

"Downtown should be a top priority. Landscaping is needed. We need to fill empty building space, including upper floors. The Main Street program needs to be established again."

"I'd like to see the tree canopy increased, but we also need to bury overhead lines, starting with the Downtown area."

"Our aerospace industry should be leveraged more."

PUBLIC MEETINGS

For any community planning project, public input is an extremely important aspect. Multiple opportunities should be available for meaningful public engagement throughout the life of the project, as was provided in this case for Tullahoma's Comprehensive Plan. The following is an overview of the numerous meetings held as part of this project's public engagement component.

Public Kick- Off Meeting

Conducted on July 6, 2021, this interactive forum featured the following:

- Introduction of City representatives and the Consultant Team
- Explanation of the project process and objectives
- Identification by public participants of Tullahoma's challenges and opportunities
- Identification by public participants of model communities

Key Person Interviews

Four key person interviews were conducted by members of the Consultant Team on August 23-25, 2021. Involving one to three individuals at a time, interviewees included political, business and institutional leaders in the community. Also, dozens of meetings were led by the Consultant team's economist as part of his work focused on economic development and real estate markets.

Stakeholder Focus Group Meetings

The City identified and recruited a diverse range of stakeholders who could provide useful information and perspectives on the various issues affecting Tullahoma. Six meetings were conducted, with each meeting including roughly a dozen individuals having a common interest in the community. Meetings were held with the following groups on August 24-26, 2021:

- Public officials (City, County, etc.)
- Business owners, environmentalists, social service providers
- Planning Commission members
- Property owners, developers, designers, and real estate profs.
- Institutional reps. (religious, educational, military, airport, etc.)
- Downtown stakeholders

Area Meetings

A series of four Area Meetings were held on August 23-26, 2021, at area schools in each of the city's geographic quadrants. The roughly three-hour meetings included following components:

- Map exercise for participants to indicate where they live, work, go to school, and play (shop, recreate, etc.) using colored dots.
- Presentation by consultants to participants providing an overview of the project and initial findings.
- Solicitation of input from participants regarding various issues.
- Open house for the duration of the meeting time, with each consultant located at a different topic-based station.

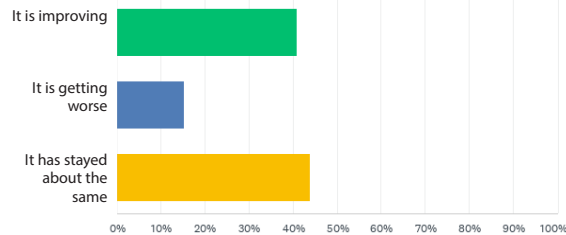


Roughly 100 citizens attended the Public Kick-Off Meeting held for the plan on July 6, 2021, at Tullahoma High School.

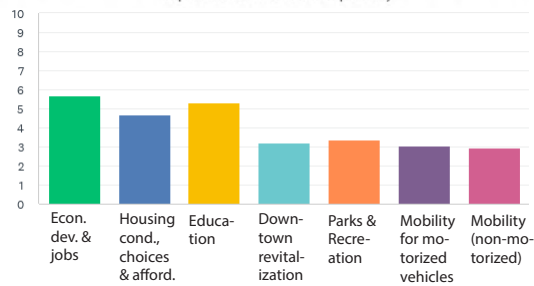
PUBLIC OPINION SURVEY

As one of several approaches to solicit public input for this plan, the City conducted a public opinion survey to gain opinions on a range of issues related to the plan. It primarily featured multiple choice questions for automated tabulation of the results. However, there were also a few opportunities for written statements to provide a richer level of input. A total of 1,157 people took the survey, which was available online. For a full version of the results, see *Appendix A: Public Opinion Survey Results*, as summarized here.

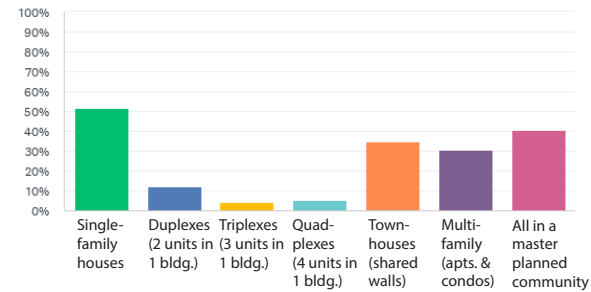
Q1 How would you describe the overall quality of life for you as a Tullahoma resident? For example, your housing, job opportunities, education, a vibrant downtown, availability of goods and services, parks, recreation and open space.



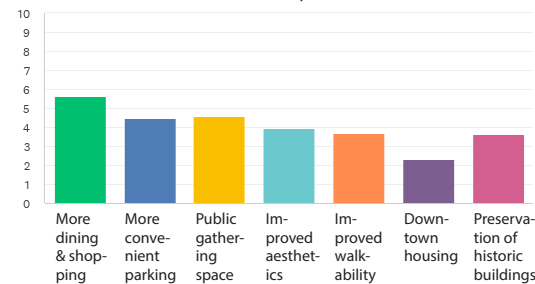
Q2 How would you rank the importance of the following issues for Tullahoma? (1 is most important and 7 is least important)



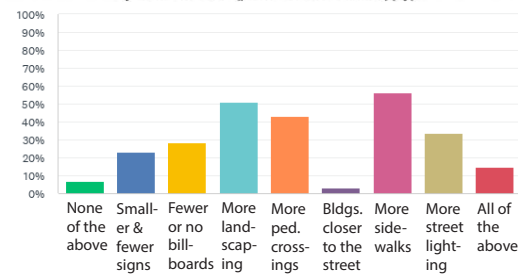
Q4 What types of housing do we need more of in Tullahoma? (please select all that apply)



Q5 Please rank the following needs for Downtown. (1 is most needed and 7 is least needed)



Q8 Jackson Street / Hwy. 41A is a key thoroughfare for Tullahoma. If this thoroughfare and adjacent lands were to be physically improved, what types of specific improvements would you like to see? (please select all that apply)



Sample Survey Comments

"We are a growing city, but still have a small town feel."

"We cannot take our family on a safe walk or bike ride directly from our home due to not having sufficient sidewalks."

"I like that we have lots of community events, a nice downtown area, and less traffic."

"There needs to be more activities that are family oriented and kid friendly, as most in Tullahoma have young kids."

"Tullahoma needs to be strategic in our small city planning and development. We should not proceed with urban sprawl, but rather using city spaces already developed (revitalizing, reinventing them). We need to focus on attractive concentrated city centers that will draw our community in to shared spaces that are able to be maintained."

"Do not become another big city. Improvements in the downtown area and historic building preservation is all it needs."

Top Consensus Ideas from the Public Workshop

- *Expand the greenway system throughout Tullahoma.*
- *Enhance existing parks in terms of parking, rest rooms, lighting, etc.*
- *Improve key roads with features such as street trees, bike lanes and sidewalks.*
- *Address stormwater issues to avoid future flooding.*
- *Revitalize Downtown to be a more attractive, economically robust and vibrant place.*
- *Provide more housing options in terms of housing types and pricing.*
- *Improve the Jackson Street corridor in terms of its function, appearance and adjacent development.*
- *Create more attractive entry ways into Tullahoma for a better first and last impression for visitors.*
- *Leverage the airport more for economic development benefits.*

CHARRETTE WORKSHOP RESULTS

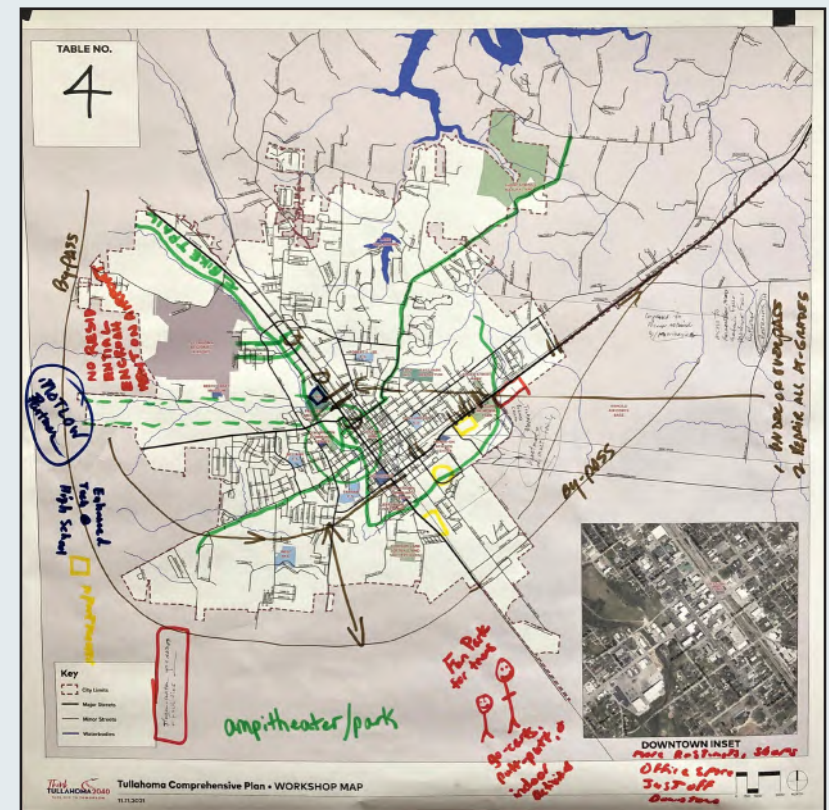
Within the context of city planning, a “charrette” is an intensive multi-day brainstorming session to generate the main ideas for a plan. It is typically conducted in a manner that engages stakeholders in a very hands-on manner. The charrette held to create the Concept Plan for Tullahoma’s Comprehensive Plan occurred on November 11-15, 2021. A key event of the charrette was the Public Workshop held at the Tullahoma High School cafeteria on November 11th, as described below.

Public Workshop

Following a presentation on the key findings of this project’s background research, as well as an orientation for Workshop instructions, the public participants were effectively “deputized” to be city planners for the evening, and the following steps occurred:

- Participants were split up into multiple teams of people.
- Each team had a base map of the city, supporting information (aerial photo maps, etc.) and a set of colored markers.
- Each team developed a plan reflecting their vision for the future of Tullahoma. The marker colors were correlated to specific planning issues.
- After roughly an hour of planning, all of the participants reconvened as one group and each team presented their plan.

Workshop photos and a sample citizen team Concept Plan



PLANNING PRINCIPLES

1. **Preserve open space and environmentally sensitive lands.** Discourage development in areas such as floodplains, wetlands, steep slopes and important plant and animal habitats. Preserve trees where possible, as well as open spaces connected to a broader open space network. Enhance the natural environment through approaches such as increased tree plantings and “green infrastructure” to help absorb and filter stormwater runoff.
2. **Maximize and leverage Tullahoma’s existing community assets.** Examples of important community assets include the downtown, older buildings throughout the city, civic destinations such as the South Jackson Civic Center and Hands-On Science Center, open spaces, streams, and other natural resources. Steer future development toward areas already developed with existing infrastructure, including the continued revitalization of the downtown.
3. **Foster safe, vibrant and walkable neighborhoods offering a high quality of life.** Tullahoma’s neighborhoods should feature a variety of housing types where appropriate, parks and recreational opportunities, strong pedestrian and biking accessibility, and small commercial nodes where appropriate. The character of existing historic neighborhoods should be protected through the preservation and maintenance of existing buildings and compatible infill development.
4. **Create a range of housing opportunities and affordable choices for Tullahoma’s residents.** While single-family detached houses will continue to dominate the community, a variety of housing types and sizes should be available, including accessory units, attached housing, and multi-family

housing to support individuals and families during all stages of life. Higher-density housing should be located where infrastructure can support it and where nearby areas can provide needed amenities, including shopping, dining and recreation.

5. **Mix Tullahoma’s land uses to create pedestrian-friendly places.** Provide locations where a mixture of land uses can be physically integrated, including commercial, office, residential and civic uses. The integration of land uses should be both horizontal and vertical (mixed use buildings). The result should be pedestrian-friendly places that can require less driving and parking, while encouraging physically and socially active environments.
6. **Promote high-quality development in Tullahoma with a strong sense of place.** High-quality development includes attractive architectural design, quality building materials, generous landscaping, and minimal visual impacts from vehicle parking areas. Buildings should have a strong physical relationship with their street, and development should reflect Tullahoma’s historic development patterns and character, where appropriate.
7. **Provide ample recreational and cultural amenities for Tullahoma’s residents.** For a high quality of life for Tullahoma’s residents, provide sufficient recreational and cultural facilities, including performing arts, visual arts, and both passive and active recreational opportunities. The community already has some top-rate museums. These amenities will benefit residents directly, and also help with economic development by attracting new job-creating businesses, as well as attracting needed employees for existing business.

Purpose & Approach

Purpose of the Principles

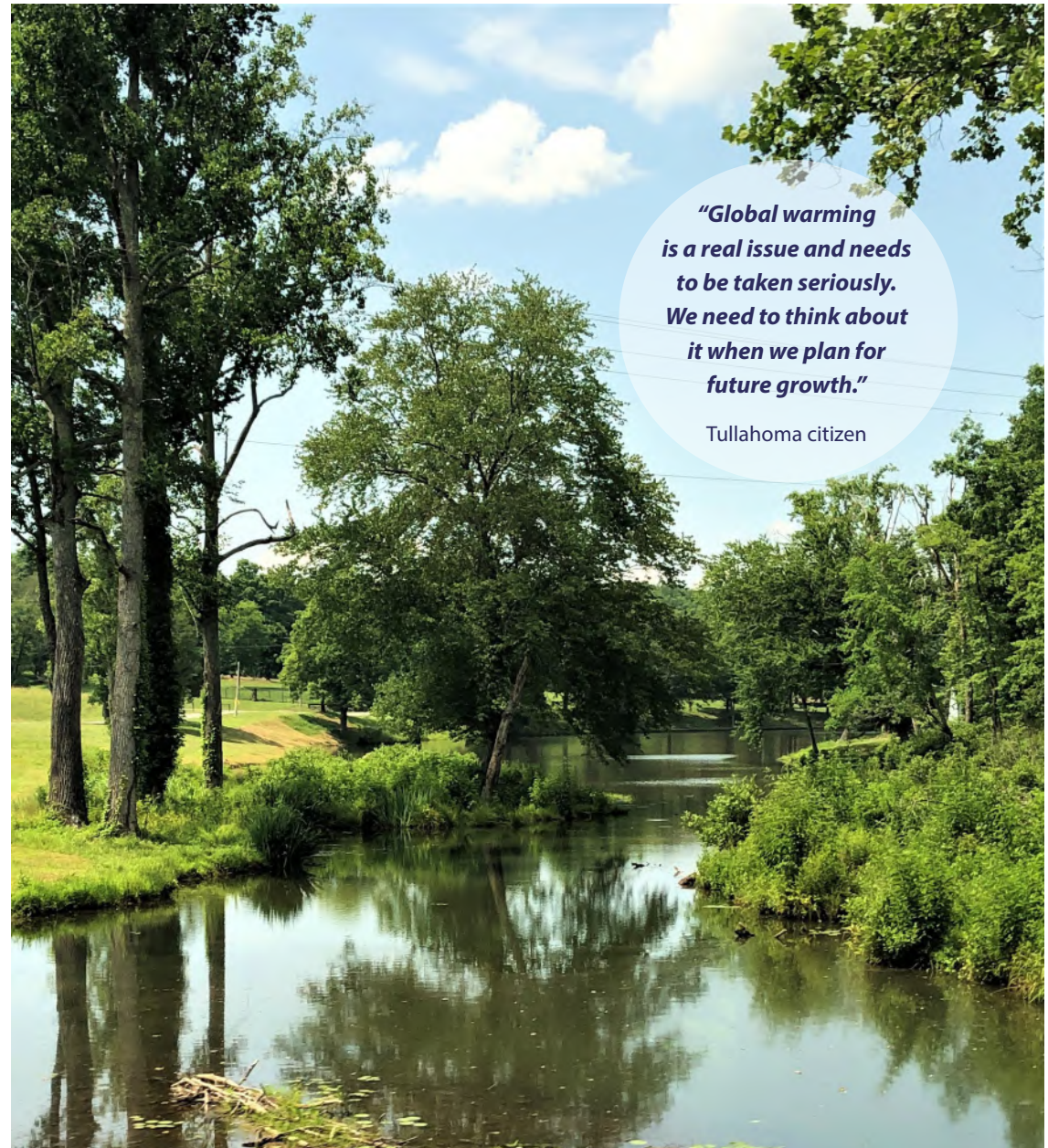
To conduct a valid, intuitive and logical planning process, it is important to bridge the research and public input phase with the plan development phase through the creation of a set of planning principles. The adopted principles should be broad objectives for which a strong consensus can be generated to help guide the more detailed planning process. When complex issues need to be resolved, it is helpful to step back and revisit the agreed upon planning principles. Their sequencing is unrelated to priorities.

Approach to the Principles

At right are the principles adopted for this plan. They were created prior to the charrette based upon recognized planning “best practices” and then adjusted based upon public feedback. These principles were then used by the public workshop participants in crafting their team plans, which are explained on the previous page.

PLANNING PRINCIPLES (CONTINUED)

8. **Provide a variety of transportation alternatives and high-quality transportation corridors within Tullahoma.** Tullahoma should be easy and convenient to navigate. Traffic congestion should be minimized, and motorized traffic should be “calmed.” Streets should be context-sensitive and accommodate a range of transportation modes, including motorized vehicles, bicyclists and pedestrians. The existing greenway system should also be expanded.
9. **Expand economic development opportunities in Tullahoma.** Tullahoma offers a business-friendly climate that welcomes new businesses that offer jobs and add to the City’s tax base. In addition to a focus on business retention and entrepreneurship, a variety of business types should be pursued for a diversified economy, including those featuring high-technology and manufacturing jobs. Tourism should also be expanded, including leveraging destinations beyond the city, but within the region.
10. **Maintain public policies and processes in Tullahoma that are equitable to both residents and developers.** Encourage meaningful resident participation in Tullahoma’s growth and development decisions, while making decisions for development applications predictable, fair, and cost-effective within a framework of policies that reflect the City’s adopted citywide Comprehensive Plan.



“Global warming is a real issue and needs to be taken seriously. We need to think about it when we plan for future growth.”

Tullahoma citizen

Tullahoma Comprehensive Plan



THE PLAN

Understanding “Urban”

The “Urban” Place Type category is one of five main categories for Tullahoma, but it has the greatest potential to be misunderstood. For many people, the term “urban” conjures up images of skyscrapers, honking car horns, and rat-infested alleys. However, urban areas are distinguished from suburban areas primarily by the following traits:

- How buildings relate to their associated streets;
- Where parking is located;
- How different land uses spatially relate to one another.

Another way of thinking of “urban” is to think “pedestrian-friendly.” Even a small country crossroads village or hamlet with one-story buildings can be urban in form if the buildings are set relatively close to the street, off-street parking is located behind buildings, land uses are physically integrated, and the overall environment is walkable. In short, “urban” places should be no more feared than Tullahoma’s cherished Downtown is feared.

PLACE TYPES OVERVIEW

In previous decades, the primary feature of a comprehensive plan was the Land Use Plan. However, such an approach failed to consider important issues that go beyond the two-dimensional topic of land use. Consequently, current planning practice takes a more holistic approach and considers a wide range of issues to determine what are referred to as “Place Types.”

Place Type Determinants

The following characteristics are considered to determine Place Types:

- Land use
- Spatial patterns
- Intensity/density
- Scale
- Form
- Character

The combination of these factors adds up to “places.” This approach differs from earlier planning practices and is a substantial improvement over those earlier approaches.

Key Place Type Categories

The five broadest Place Type categories include the following:

- Natural
- Rural
- Suburban
- Urban
- Special Districts

Within each of those categories are a series of more specific Place Type sub-categories.

Relationship of Place Types to Zoning

Zoning is one of many tools to implement a plan such as this plan for Tullahoma. Although the determination of Place Types for any specific location is driven strongly by existing land uses and devel-

opment form, *Place Types* are recommendations for the future rather than serving as an existing conditions inventory. The Place Types map on [page 43](#) should be used in the future for zoning purposes, although the fine-grained nature of zoning may require the creation of more or fewer zoning districts than the number of Place Types contained in this plan.

“We don’t want a plan based on land uses. We want a plan based on experiences. Who visits downtown to see land uses?”

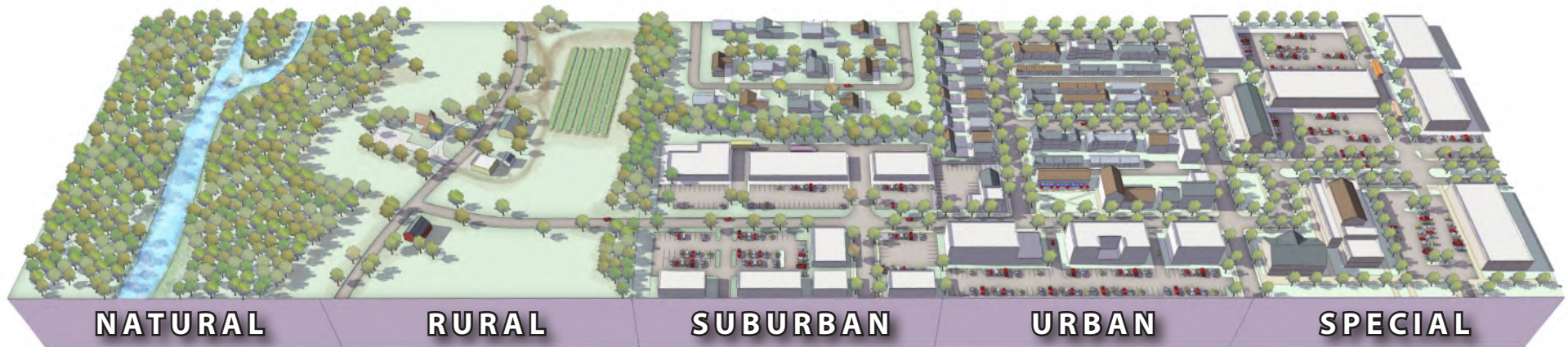
Mitchell Silver - Former President - American Planning Association

Factors Considered for the Place Types Map

Below are the various factors that were considered in preparing the Place Types map for Tullahoma illustrated on [page 43](#):

1. *Inherent land features*, including the presence and extent of environment constraints, such as steep slopes and floodplains.
2. *Existing land uses*, including the area’s context.
3. *Current density or intensity, form, and character* of development, including the area’s context.
4. *Existing and potential infrastructure*, including the availability of roads, sewer, water, and power to the area.
5. *Real estate market conditions*, including those identified by this plan’s housing market analysis.
6. *Public and stakeholder preferences* based upon this project’s public engagement process.
7. *Current public policies*, including zoning and development policies.
8. *“Best Practices” for city planning*, including Smart Growth and sustainability approaches in pursuit of a high quality of life for Tullahoma’s citizens.

TULLAHOMA PLACE TYPES



NATURAL

Locations

Throughout the city, but particularly in the southeast and west. It is associated with creeks and related floodplains, particularly along Rock Creek.

Geographic Form

Irregularly shaped linear and curvilinear forms following the natural contours of streams.

Optimal Land Uses

Undeveloped areas for outdoor passive recreation and greenways.

Density & Form

Not applicable because of the very limited development in such areas.

RURAL

Locations

Peripheral to the city and exclusively within Tullahoma's Urban Growth Boundary areas in Coffee and Franklin Counties.

Geographic Form

Nodal in form, irregularly shaped and expansive.

Optimal Land Uses

Undeveloped open space, agriculture, and low-density single-family housing.

Density & Form

Other than Natural areas, the lowest density for Tullahoma (min. 3-acre lots). Houses, outbuildings, and agricultural structures in generally informal patterns.

2 acre lots

SUBURBAN

Locations

Throughout the city, including corridors along key roads such as Jackson Street.

Geographic Form

Based on the sub-category, as commercial and mixed use areas are linear, while residential areas are nodal.

Optimal Land Uses

A wide range of residential, commercial and civic uses.

Density & Form

A range of residential densities, including lots generally no less than 10,000 sq. ft., and relatively low-density commercial. An automobile orientation with segregation of most land use types.

URBAN

Locations

Core areas around Downtown, as well as throughout the city with respect to new traditional neighborhoods.

Geographic Form

Primarily nodal and rectilinear in shape because they are bound by property lines.

Optimal Land Uses

A wide range of residential, commercial and civic uses.

Density & Form

Buildings fronting on streets with on-street parking, parking lots behind buildings, alleys, sidewalks, integrated land uses, parks/plazas, and relatively small residential lots. These are the highest density areas of town.

SPECIAL

Locations

Generally scattered, but particularly in the northwest and southeast areas of town.

Geographic Form

Most areas are nodal, but some are linear along the key highways and rail lines.

Optimal Land Uses

Depending upon the specific place type, but institutional uses, industrial uses and large community facilities.

Density & Form

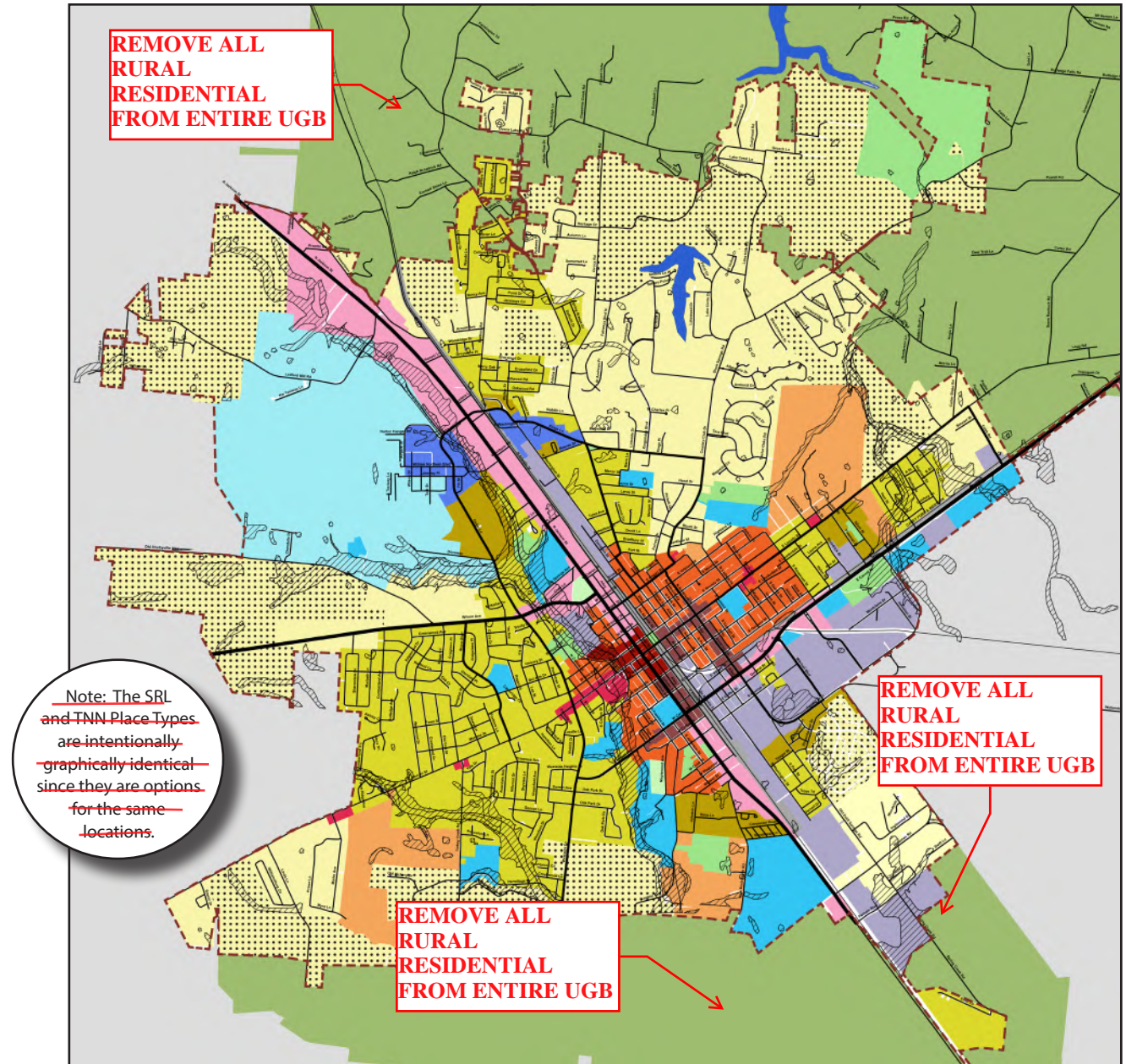
Varies greatly depending upon the use. Industrial uses can be large and should be buffered at the periphery. Institutional uses are often campus-like. Most areas are relatively low-density.

PLACE TYPES MAP

At right is the Place Types map that serves as the overall foundation of this plan, including the map legend indicating the various Place Type categories and sub-categories. The number of sub-category areas are listed below for each of the main Place Type categories:

- Natural - 1
- Suburban - 6
- Special - 6
- Rural - 1
- Urban - 6

The following pages explain each Place Type and their sub-categories. It is noteworthy that, if Place Types are transformed into Zoning districts at some point in the future, they would only become relevant when new development is proposed because of the “grandfathering” of all existing land uses and development. Also, the introduction of new roads may change some Place Types.



NATURAL AREAS

Natural Areas consist of water bodies, floodplains, and wetlands, as illustrated with cross hatching on the map.

Locations

Natural areas are located throughout the city, but particularly in the southeast and west portions of Tullahoma. They are associated with creeks and related floodplains and wetlands, particularly along Rock Creek.

Geographic Form

Natural areas feature irregularly-shaped linear and curvilinear forms following the natural contours of streams.

Optimal Land Uses

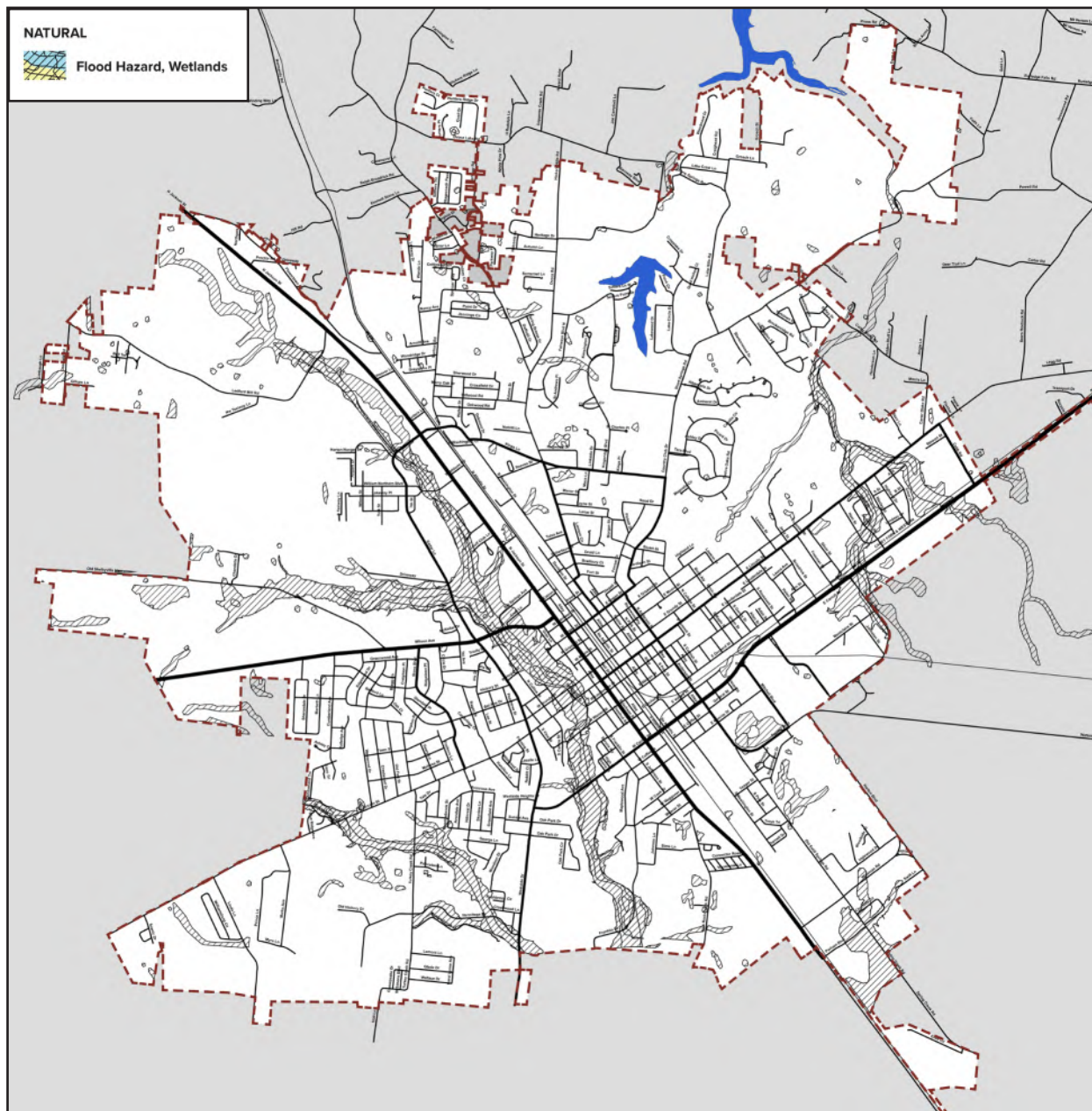
The optimal land uses for Tullahoma's Natural areas include undeveloped areas for environmental value, outdoor passive recreation, and greenways and their associated trailheads.

and

Density & Form

This consideration for Natural areas is not applicable because of the very limited development that should occur in such areas. Consequently, these areas comprise Tullahoma's lowest density and intensity lands. However, land owners can always raise the elevation with fill material so that new buildings are elevated above the floodplain.

It is noteworthy that, because environmental resources are typically protected through development regulations such as floodplain regulations rather than through zoning, a zoning district specific to Natural areas is unlikely to be designated. Consequently, other Place Types are illustrated beneath the cross hatching for the Natural areas.



NATURAL AREAS (CONTINUED)

"The beneficial use of the flood plain is our best protection against floods. The preservation of wetlands protects a natural sponge for floodwaters...."

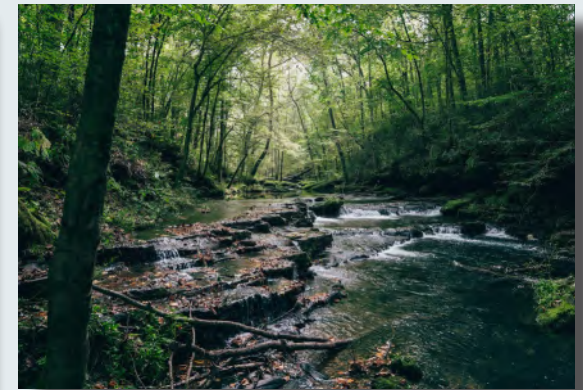
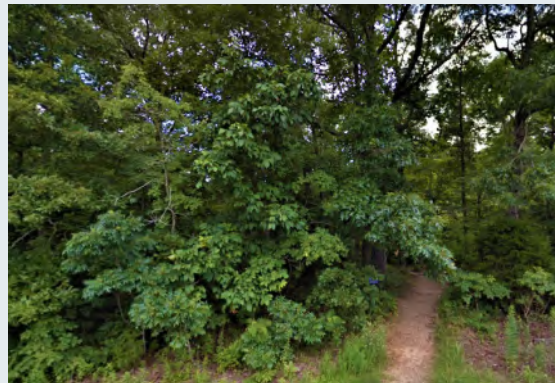
- Senior FEMA Official

Source: Earthquake Engineering Research Institute's Mitigation Center



REPRESENTATIVE AERIAL PHOTO

CHARACTER IMAGERY: NATURAL AREAS



RURAL AREAS

With the exception of Natural areas, which are also shown on the map at right, Rural areas should have the lowest density levels for development. These areas are highlighted in the olive shade of green in the map at right.

Locations

Tallahoma's Rural areas ~~are located exclusively~~ ^{typically located} in the Urban Growth Boundary (UGB) portions of the community beyond the city limits and within Coffee and Franklin Counties. It is recognized that the respective Counties have authority within these areas and this is merely a recommendation in case any future annexations might occur.

Upon annexation into the City, Place Type designations will be determined on an individual basis through the Plan Map amendment process.

Geographic Form

Rural areas are nodal in form (not linear), irregularly shaped and expansive.

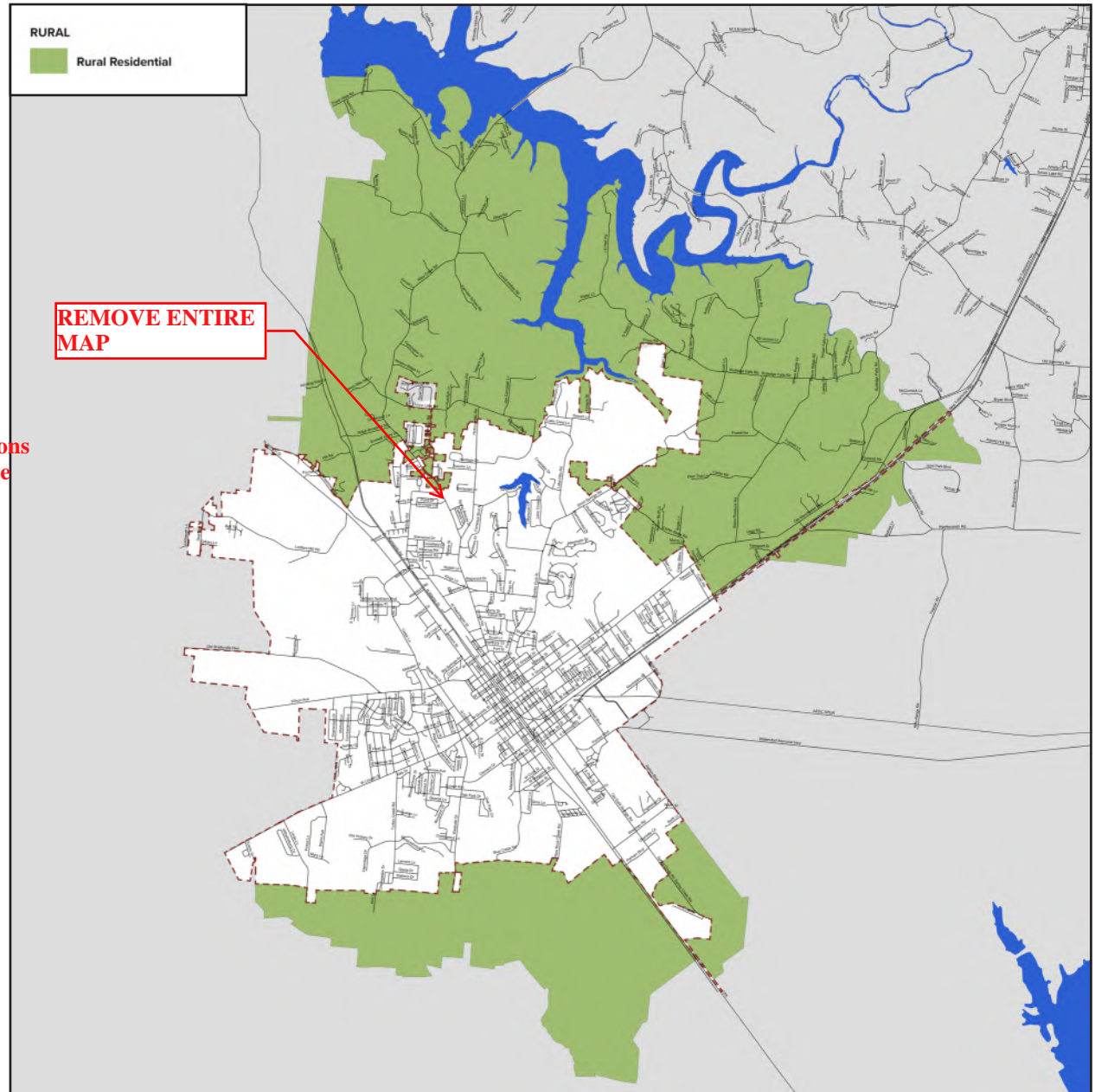
Optimal Land Uses

The primary land uses within Tallahoma's Rural areas include undeveloped open space, agriculture, low-density single-family houses and associated outbuildings.

and Density & Form

Other than the Natural areas, Tallahoma's Rural areas have the lowest density with minimum lot sizes of ²~~3~~ acres. Building heights should not exceed 35 feet. Front, side ^{75'}~~and rear~~ setbacks for building should be at least 100 feet. Houses, outbuildings, and agricultural structures are scattered in generally informal patterns.

See [pages 107-108](#) in this plan's "Plan Implementation" section for more on Tallahoma's Urban Growth Boundary.



RURAL AREAS (CONTINUED)

"The care of the earth is our most ancient and most worthy and, after all, our most pleasing responsibility. To cherish what remains of it, and to foster its renewal, is our only legitimate hope."

- Wendell Berry - poet and environmental activist



CHARACTER IMAGERY: RURAL AREAS



SUBURBAN AREAS

Suburban areas are too developed to be Rural, and too low-density and auto-dependent to be Urban. Suburban areas occupy more of Tullahoma than any of the other primary Place Types. The six Suburban Place Types can be categorized into two general groups, as follow:

Commercial / Mixed Use Areas

There are two Suburban Commercial / Mixed Use areas:

Suburban Corridor Areas

These are linear places oriented along Tullahoma's primary highways that feature a range of commercial uses.

Suburban Office Areas

There are only two such areas and they flank either side of Jackson Street near the airport.

Neighborhoods

There are four categories of Neighborhood Place Types:

Suburban Neighborhoods - Low

These primarily residential areas have the largest lot sizes for single-family detached houses.

Suburban Neighborhoods - Low / TNN Option

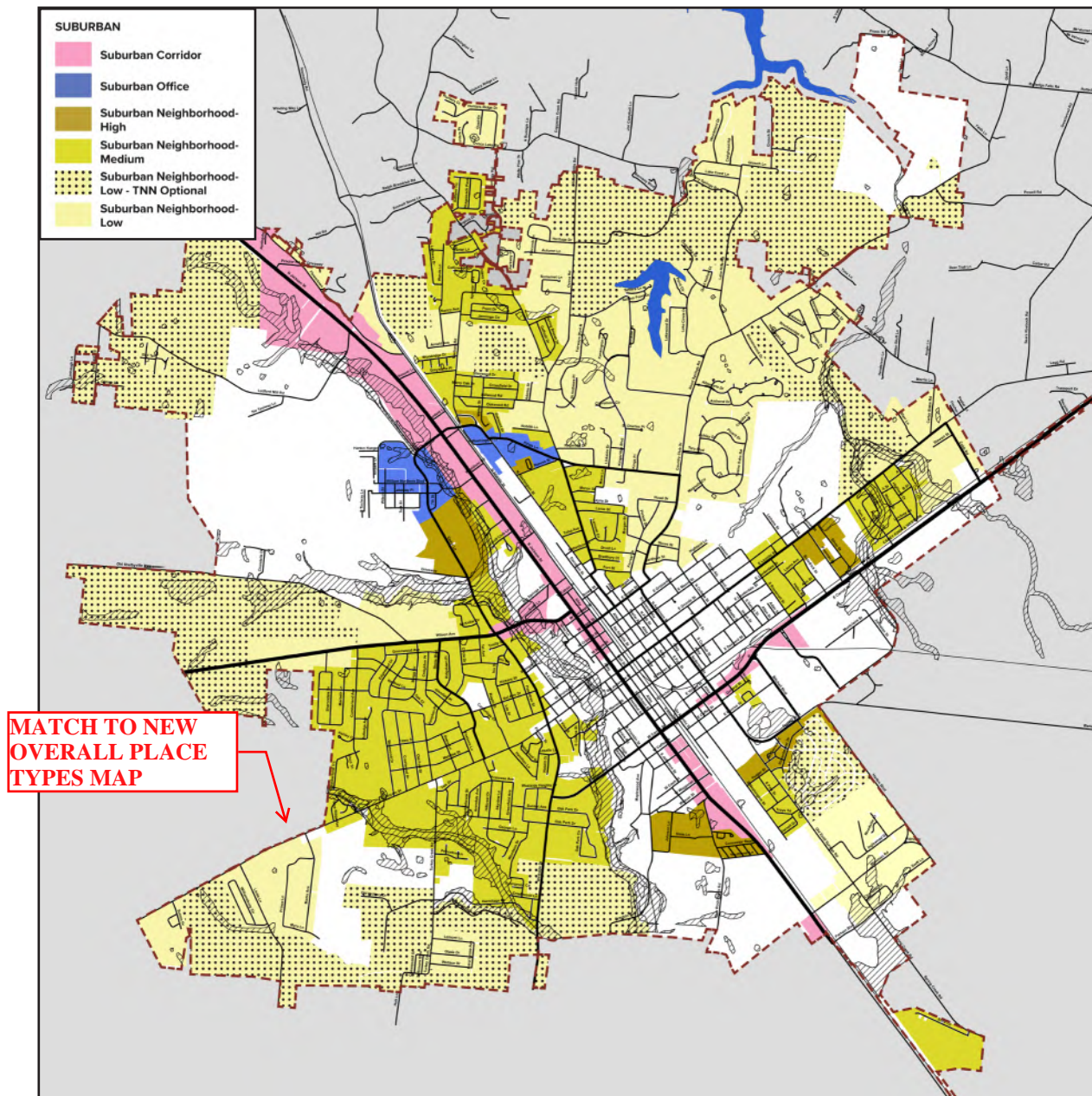
This option is explained in the Urban Place Types section regarding Traditional Neighborhood - New (TNN).

Suburban Neighborhoods - Medium

Similar to the "low" category above, these areas have slightly smaller residential lots.

Suburban Neighborhoods - High

Very limited in land area, this Place Type features the highest density of Suburban residential areas.



SUBURBAN AREAS (CONTINUED)

"The two elements of the suburban pattern that cause the greatest problems are the extreme separation of uses and the vast distances between things."

- James Howard Kunstler - planning critic



CHARACTER IMAGERY: SUBURBAN AREAS



SUBURBAN AREAS (CONTINUED)

SUBURBAN CORRIDOR AREAS

These areas feature primarily post-1950s development with a strong automobile orientation. Planning objectives for these important and high-profile areas include smaller and less signage, more landscaping, expanded sidewalks, fewer and narrower driveways, cross-access between adjoining sites, and less front parking and more to the sides and rear of buildings.

Locations

This Place Type is located along just two key roads - North and South Jackson Streets (Hwy. 41A) and East Carroll Street (Hwy. 55)

Geographic Form

Tulahoma's Suburban Corridors have a linear form flanking either side of their associated roads for the majority of their lengths. However, they have the future potential to be more nodal at key road intersections.

Optimal Land Uses

Optimal land uses for this Place Type include retail, dining (including fast food with drive-thru windows), personal services, and related uses. While not currently prevalent, there is also future potential for multi-family housing.

Density ^{and} Form

This Place Type features buildings with a wide range of building footprints from small, single-use structures to large big-box commercial. Most buildings are one-story in height. This Place Type is generally suburban in form and character, including frequent curb cuts / driveways and parking that is typically located between the road and buildings. Front setbacks are typically at least 35 feet. The City's objective is that, in the future, such areas will have fewer curb cuts / driveways, more parking on the sides of buildings, and less parking between buildings and their associated streets.

SUBURBAN OFFICE AREAS

There are only two areas that have been designated as Suburban Office Place Types, and the planning objectives are similar to those of the adjacent Suburban Corridor areas.

Locations

There are only two Suburban Office areas, and they flank either side of the North Jackson Street corridor in the general vicinity of the airport. Rather than fronting directly onto North Jackson Street, these areas are located behind those Suburban Corridors.

Geographic Form

Tulahoma's Suburban Office areas have a nodal form, which is preferable relative to the linear form of the adjacent Suburban Corridors.

Optimal Land Uses

Optimal land uses for this Place Type include offices of various types, including medical offices and corporate headquarters. ← and office support retail uses

Density ^{and} Form

As with Suburban Corridors, this Place Type features buildings with a range of building footprints. However, building heights can range from one to three or four stories. Front setbacks are typically at least 35 feet. This Place Type is generally suburban in form and character, including frequent curb cuts / driveways and parking that is typically located between the road and buildings. However, as noted previously, it is a planning objective to improve the parking locations, access, signage and landscaping of such places.

SUBURBAN NEIGHBORHOODS - LOW*

These primarily residential areas have the largest lot sizes for single-family detached houses in Tulahoma, and they are located relatively peripheral within the city boundaries. Key planning objectives for such areas include the preservation of common open space and strong multi-modal connectivity.

Locations

This Place Type is located in peripheral areas of Tulahoma in all directions, although the most expansive such area is in the northeast quadrant of the city.

Geographic Form

This Place Type is nodal in form and has generally rectilinear shapes given that they are dictated by linear property lines.

*The Traditional Neighborhood - New (TNN) option is explained in the Urban Place Types section.

SUBURBAN AREAS (CONTINUED)

Optimal Land Uses

Optimal land uses for this Place Type are single-family detached houses and any ancillary uses, including outbuildings and institutional uses that support housing.

and Density & Form

Lots in these areas are 20,000 square feet (or a half-acre) and greater. Minimum lot widths are 75 to 100 feet and minimum front setbacks are 35 to 50 feet. This Place Type is suburban in form and character, including generous front setbacks for houses. While lots are typically accessed by a front driveway, the visual impact of garages should be minimized by: 1) placing it at the rear of a lot; 2) recessing it behind the front facade if the garage doors face the street; or 3) turn it so that the garage doors do not face the street.

SUBURBAN NEIGHBORHOODS - MEDIUM

These primarily residential areas feature lots for single-family detached houses that are moderate in size relative to the other Suburban Neighborhood areas in Tullahoma. Key planning objectives for such areas include the preservation of common open space and strong multi-modal connectivity, including sidewalks and street trees.

Locations

This Place Type is located primarily in the north, northeast and southwest parts of town, with the most expansive area being in the southwest.

Geographic Form

As with the other Suburban Neighborhood areas in Tullahoma, this Place Type is nodal in form and has generally rectilinear shapes because of the linear property lines.

Optimal Land Uses

Optimal land uses for this Place Type are single-family detached houses and any ancillary uses, including outbuildings and institutional uses that support housing. Two-family dwellings can occur if designed to resemble single-family houses in form and massing.

and Density & Form

Lots in this area are generally 10,000 square feet (or a 1/4 acre) and greater. This Place

Type is suburban in form and character, including relatively generous front setbacks for houses at a minimum of approximately 35 feet. While lots are typically accessed by a front driveway, it should be encouraged that the visual impact of garages be minimized by: 1) placing it at the rear of a lot; 2) recessing it behind the front facade if the garage doors face the street; or 3) turn it so that the garage doors do not face the street.

SUBURBAN NEIGHBORHOODS - HIGH

While somewhat limited in land area, this Place Type features the highest density of Suburban Neighborhood areas in Tullahoma. Key planning objectives for such areas include the preservation of common open space and strong multi-modal connectivity, including sidewalks and street trees.

Locations

This Place Type is limited mainly to the southern portions of town and along Cedar Lane.

Geographic Form

This Place Type is nodal in form and has generally rectilinear shapes because of the linear property lines.

Optimal Land Uses

Optimal land uses for this Place Type are single-family detached houses, attached houses (duplexes, triplexes, quads and townhouses), and multi-family housing, as well as any ancillary uses, including outbuildings and institutional uses that support housing.

and Density & Form

The smallest lot size for single-family detached houses should be 5,000 square feet with minimum lot widths of 50 feet. This Place Type is suburban in form and character, although the front setbacks for houses can be more shallow than those of the other Suburban Neighborhood Place Types in Tullahoma (minimum of 20 to 25 feet). While lots are typically accessed by a front driveway, it should be encouraged that the visual impact of garages be minimized by: 1) placing it at the rear of a lot; 2) recessing it behind the front facade if the garage doors face the street; or 3) turn it so that the garage doors do not face the street. Alleys should be encouraged (and perhaps even required) when lot widths are 50 feet or less. The gross density for multi-family should not exceed 15 dwelling units per acre. To avoid repetition, developments will need design variation.

URBAN AREAS

Tulahoma's Urban areas are the oldest, most dense, diverse, and walkable parts of town. As in the case of the Suburban Place Types, they can be categorized into two general groups, as follow:

Commercial / Mixed Use Areas

There are three Urban Commercial / Mixed Use areas:

Downtown Core

This area features the most dense part of the historic Downtown and includes 16 blocks on the west side of the rail line.

Downtown Corridors

These corridors extend from the Downtown Core along streets such as South Jackson Street, Lincoln Street and South Anderson Street.

Neighborhood Centers

There are roughly a half dozen of these small mixed-use areas and most are located at various intersections along Lincoln Street.

Neighborhoods

There are two categories of Neighborhood Place Types:

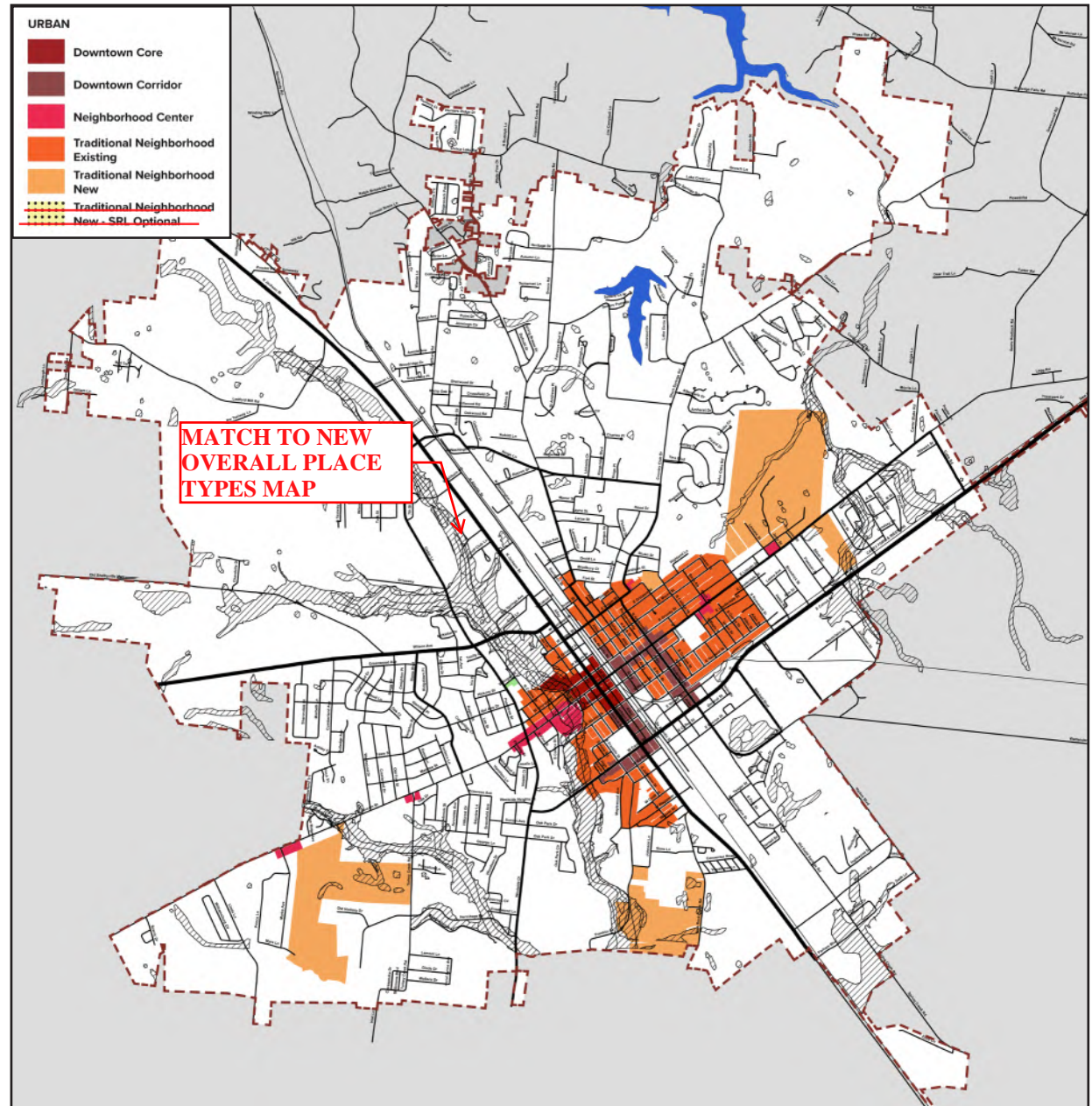
Traditional Neighborhoods - Existing

These areas are older, relatively high density, and located around the Urban Place Types.

Traditional Neighborhoods - New

Newer versions of the "existing" Traditional Neighborhoods, these areas are located beyond the city's core area.

Urban Place Types are described on the following pages.



URBAN AREAS (CONTINUED)

"It's really kind of hard to be a suburb of nothing. If you don't have a downtown, you really don't have anything. It's hard to build a community around parking lots and subdivisions."

- Ed McMahon - Senior Fellow at Urban Land Institute



REPRESENTATIVE AERIAL PHOTO

CHARACTER IMAGERY: URBAN AREAS



URBAN AREAS (CONTINUED)

DOWNTOWN CORE

This area features the most dense part of Tullahoma's historic Downtown and includes 16 blocks on the west side of the rail line. Key streets include Jackson, Atlantic and Lincoln. See [pages 89-96](#) of this plan for the section on how to further revitalize Downtown.

Locations

This Place Type features the most central portion of the historic Downtown. It is bound roughly by Moore Street at the north, Warren Street at the south, Atlantic Street at the east, and the Rock Creek floodplain on the west.

Geographic Form

This Place Type is nodal in form and has rectilinear shaped boundaries following block and lot lines.

Optimal Land Uses

Primary land uses for the Downtown Core include retail, dining, personal services, offices, institutional uses, lodging, high-density housing, and public space.

~~Density~~ ^{and} ~~Form~~

This Place Type is the most densely developed part of Tullahoma. Building footprints occupy most of their lots, and most buildings are one or two stories in height. This Place Type features buildings fronting directly onto streets, on-street parking, parking lots located behind buildings, preserved historic buildings (although many current buildings have been altered), and broad sidewalks accommodating outdoor dining. Future new infill buildings should be compatible with the existing historic buildings.

DOWNTOWN CORRIDORS

Tullahoma's Downtown Corridors are linear extensions or "tentacles" projecting outward from the Downtown Core area. Their relatively high traffic levels provide economic energy for the commercial uses that line their streets.

Locations

These corridors extend from the Downtown Core along streets such as South Jackson Street, Lincoln Street and South Anderson Street.

Geographic Form

This Place Type is linear in form because it is oriented along key Downtown area streets, but it has rectilinear shaped boundaries following block and lot lines.

Optimal Land Uses

Primary uses include retail, dining, personal services, offices, institutional uses, lodging, moderate to high-density housing, and public space.

~~Density~~ ^{and} ~~Form~~

Although this Place Type has relatively high densities, it is not as dense as the adjoining Downtown Core Place Type. Overall, this Place Type features many older buildings fronting directly onto streets, and it is more walkable than Tullahoma's Suburban areas. Connectivity of streets and for non-motorized travel should be a high priority. However, there are segments of this Place Type, such as Atlantic Street south of Lincoln Street, where buildings are set back further from the street (10 to 20 feet) or missing altogether, resulting in vacant lots providing infill building opportunities. Despite buildings set back from the street in portions of this Place Type, parking should generally be located to the side and/or rear of buildings, unlike the more auto-dominated suburban areas. Additionally, this area contains older houses that have been converted to commercial uses, while maintaining their residential form, and this is an appropriate pattern.

NEIGHBORHOOD CENTERS

There are roughly a half dozen of these small mixed-use areas in Tullahoma, and they offer conveniently-located businesses and services for nearby residents, as well as for through traffic.

Locations

All of the Neighborhood Centers are located at various intersections along Lincoln Street. Only one is located east of the rail line, and the most expansive one is comprised of a four-block segment that extends west from the Rock Creek floodplain.

Geographic Form

Some Neighborhoods Centers, such as those limited to a single block, are nodal in form. Others that feature more than one block in length are more linear. All have rectilinear shapes because their boundaries consist of streets and lot lines.

URBAN AREAS (CONTINUED)

Optimal Land Uses

Primary uses include small-scale retail, dining, and personal services. However, these uses are more neighborhood-oriented than those of the other two commercial and mixed-use Urban Place Types. There is also potential for small-scale residential uses.

and

Density & Form

Similar to the Downtown Place Types, Neighborhood Centers feature building footprints occupying much of their lots, but it is slightly less dense/intense. This Place Type features buildings either fronting directly onto streets or with modest front setbacks, on-street parking, parking lots behind and/or beside buildings, preserved historic buildings, compatible new buildings, and relatively wide sidewalks accommodating outdoor seating. Neighborhood Centers are intended to function as a convenient center for their neighborhoods, and their relatively small scale fits comfortably with nearby residential areas.

Move this entire section to after the "Suburban Residential Low on Page 51"

TRADITIONAL NEIGHBORHOODS - EXISTING

These areas are older (pre-1950s), relatively high-density, and primarily residential. They are located around the commercial and mixed-use Urban Place Types.

Locations

The most expansive and contiguous existing Traditional Neighborhood area begins immediately east of the rail line and extends east to Roosevelt Street, and it extends roughly five blocks to the north and south of Lincoln Street. Other locations are on the west side of Jackson Street and on both sides of the Rock Creek floodplain.

Geographic Form

This Place Type is generally nodal in form. The boundaries are rectilinear because they follow lot lines and streets.

Optimal Land Uses

Land uses in this Place Type are primarily residential, and most housing consists of single-family detached houses. However, there are also opportunities to provide a variety of housing types that are compatible with the historically single-family residential character in form and placement on the lot. Multi-family housing that resembles the

placement, form, and massing of single-family detached dwellings on larger lots is appropriate as long as there are no more than three of these type buildings built in a row. Additionally, lots may be consolidated to allow for a group of smaller single-family detached or two-family attached dwellings around a central courtyard. Such courtyard types should maintain some frontage to the street and not dominate a single block. For all building types, parking should be located to the side and/or rear of dwellings.

and

Density & Form

Relative to other parts of Tullahoma, this Place Type's residential densities are somewhat high, but a range of lot sizes should be allowed to accommodate a range of housing types. Minimum density ranges of 4 units per acre apply to single-family detached houses, while a maximum density of 15 units per acre applies to higher density housing types. This Place Type features many older buildings fronting directly onto streets, and it is generally more walkable than Tullahoma's Suburban areas. Infill buildings should look to surrounding older buildings to determine the appropriate building setbacks.

SUBURBAN RESIDENTIAL LOW - TRADITIONAL NEIGHBORHOODS NEW OPTION

~~TRADITIONAL NEIGHBORHOODS - NEW~~

~~These areas are yet-to-be developed, relatively high-density, and primarily residential. They are located around the commercial and mixed-use Urban Place Types (not including the Suburban Residential - Low areas with the TNN option).~~

Locations

There are several undeveloped areas that have been designated with this Place Type. All of them are located relatively peripheral with respect to the community's boundaries. One objective with this Place Type's locations is to avoid too much "leap frog" development from occurring just beyond the city boundaries, as this Place Type has the incentive of fairly high densities.

For zoning purposes, this Place Type should also be treated as a "floating zone" in that it may occur in additional locations that are designated Suburban Residential - Low when the site and development meet certain minimum criteria. Examples of criteria include:

- Minimum site size ~~(20 or 25 acres)~~ **10 acres**
- Proximity to one or more community facilities (school, park, etc.)
- Providing a range of housing types
- Inclusion of at least a small commercial/institutional component

PLACE TYPES

URBAN AREAS (CONTINUED)

The last criterion might be dependent upon a site with a relatively major road so that through traffic can help to support the commercial and/or institutional use(s).

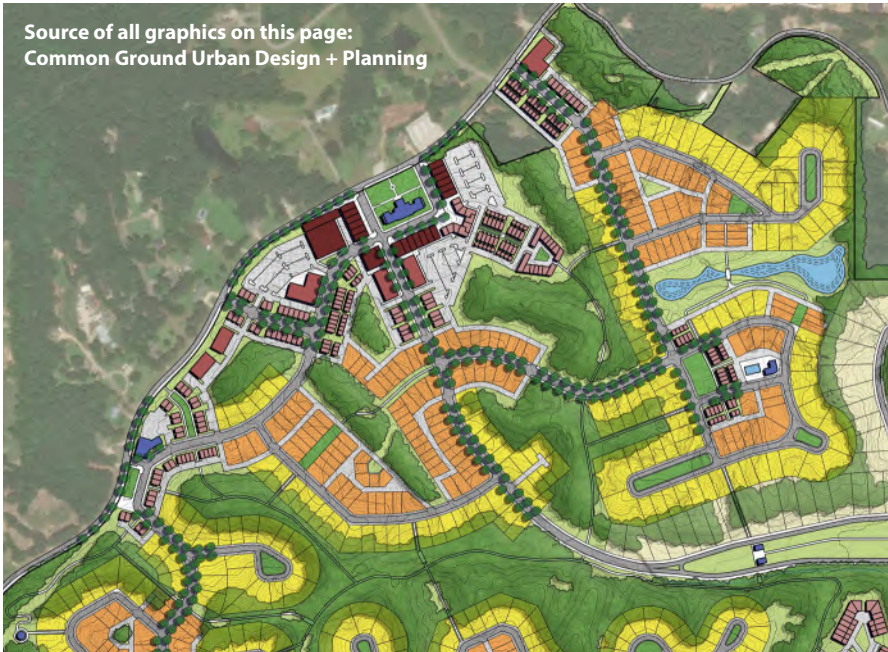
Geographic Form

This Place Type is irregularly-shaped and varies, depending on the specific area.

Optimal Land Uses

Land uses in this Place Type are primarily residential, and most housing consists of single-family detached houses. However, there can be a range of lot and house sizes, and there are opportunities at appropriate locations for attached housing, including townhouses, as well as multi-family housing (condominiums and/or apartments).

Source of all graphics on this page:
Common Ground Urban Design + Planning



This example of new development from another community (Oxford, MS) illustrates the wide range of uses within a new traditional neighborhood, including retail, housing in a variety of types, institutional uses, and both formal and informal open spaces.

Density & Form

Relative to other parts of Tullahoma, this Place Type's residential density could reach as high as 20 units per acre for specific housing types, but the gross density should be much less. That is because this Place Type has a very different character than Suburban Neighborhood – High areas. Traditional Neighborhood - New areas are master planned developments that are compact, interconnected, and highly walkable. They feature a network of streets and blocks with a variety of building types, not pods of single uses. Buildings front streets or civic spaces rather than parking lots. Streets are narrow and feature on-street parking to help calm traffic and create a more pedestrian-friendly environment. In addition to preserving the most environmentally valuable natural areas, these communities feature usable civic spaces in the form of squares, greens, and parks. In limited instances when adjacent to a key thoroughfare, these areas feature small neighborhood-serving commercial and/or civic uses.



Proposed typical ratios of 10% non-residential development and 20% duplex/apartment/townhome development and the remaining and majority of the development with a single family residential use.

Relative to other parts of Tullahoma, this Place Type's residential density could reach as high as 20 units per acre for specific housing types, but the gross density should be much less. That is because this Place Type has a very different character than Suburban Neighborhood – High areas. Traditional Neighborhood - New areas are master planned developments that are compact, interconnected, and highly walkable. They feature a network of streets and blocks with a variety of building types, not pods of single uses. Buildings front streets or civic spaces rather than parking lots. Streets are narrow and feature on-street parking to help calm traffic and create a more pedestrian-friendly environment. In addition to preserving the most environmentally valuable natural areas, these communities feature usable civic spaces in the form of squares, greens, and parks. In limited instances when adjacent to a key thoroughfare, these areas feature small neighborhood-serving commercial and/or civic uses.

and is approved through the Planned Development process as outline in the Zoning Ordinance.

SPECIAL AREAS

This category of Place Types is a “catch all” for places that do not fit neatly into any of the other categories. When they occur on a small scale, they can be part of another Place Type. For example, a small church can be part of another Place Type, but a large church that features a range of ancillary uses and activities might be more appropriately designated as a Special Area. Below is a brief summary of each Special Area category:

Airport

The Tullahoma Regional Airport is located in the north-west corner of the city and is the only airport in the city.

Industrial

These areas are scattered but primarily around the airport and along South Washington and East Carroll Streets.

Large Civic/Institutional

These schools and similar uses are throughout the city.

and Parks & Recreation

As with large civic/institutional uses, this Place Type is evenly located throughout Tullahoma.

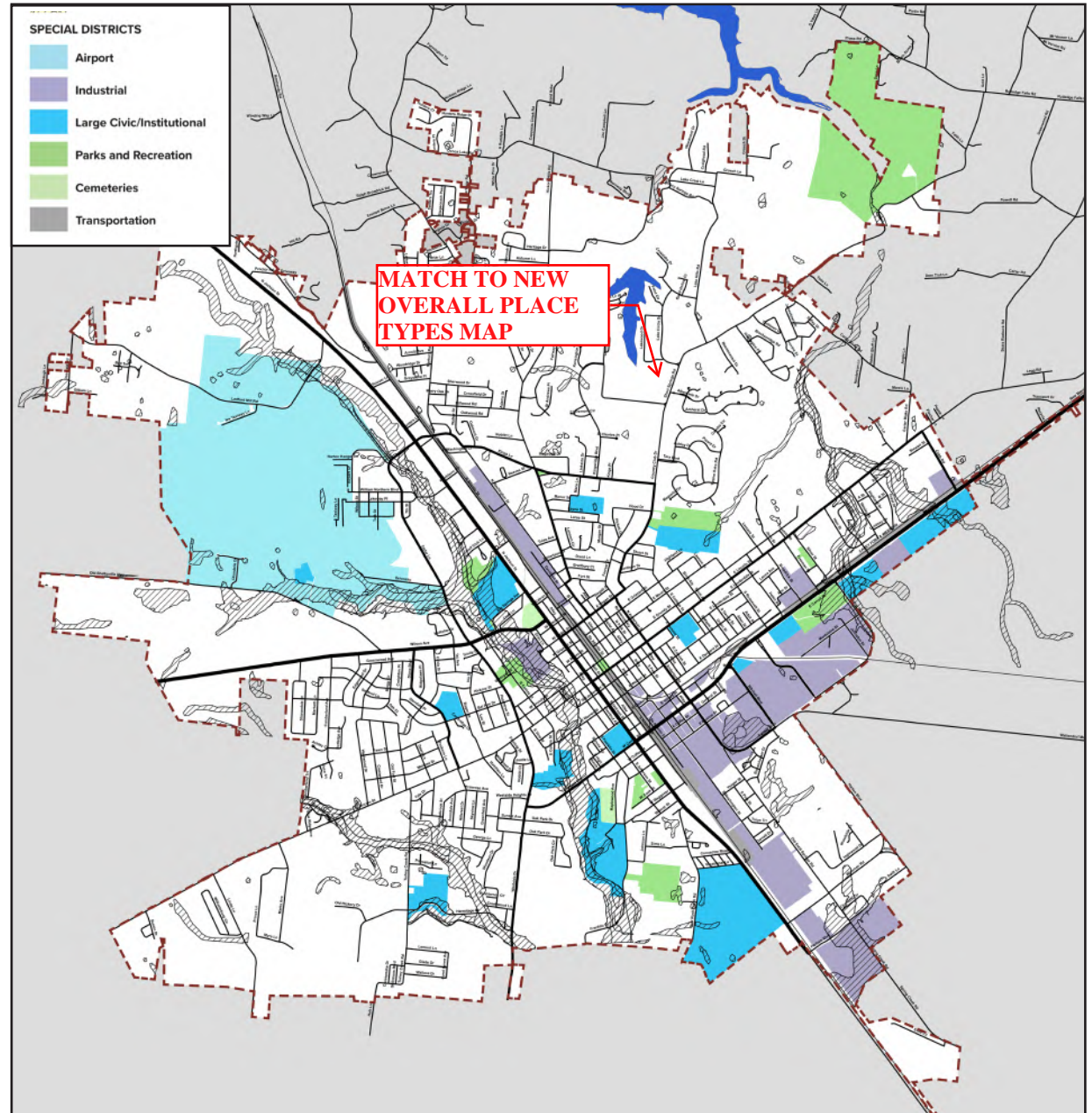
Cemeteries

There are only a few major cemeteries in Tullahoma and they are described on the following pages.

Transportation

Unlike other types of ROW in Tullahoma, these rail line ROWs are actually owned by the railroad companies.

The following pages explain each of these Special Area Place Types in more detail.



PLACE TYPES

SPECIAL AREAS (CONTINUED)

"My perfect weekend is going for a walk with my family in the park. I don't think there's anything better."

– Anne Wojcicki - American entrepreneur



CHARACTER IMAGERY: SPECIAL AREAS



SPECIAL AREAS

and AIRPORT & INDUSTRIAL AREAS

These are two similar, but separate, Place Type categories. Any specific distinctions will be pointed out below.

Locations

The Airport is located in the northwest quadrant of the city, and there are Industrial areas abutting it along its southern edges. The balance of Industrial areas are located along South Washington Street and south of East Carroll Street.

Geographic Form

These Place Types comprising and near the Airport are generally nodal, while the Industrial areas associated with the main corridors referenced above are more linear in form.

Optimal Land Uses

Optimal land uses for the *Airport area* include any sort of aeronautic activities and ancillary uses, including airplane maintenance/repair services and distribution centers for air cargo. Flex/office, research and development (R&D), and industrial uses are also viable for the Airport area. Uses that might be negatively impacted by air traffic noise, particularly housing, should be discouraged in the vicinity of the Airport. In fact, discouraging such new uses in the future is critical to the future growth and success of the Airport. Potential uses in *Industrial areas* include manufacturing, assemblage, warehousing, and office support uses that are ancillary to industrial uses.

and Density & Form

Because of the broad range of specific uses and development forms that might be part of this Place Type, no development densities are specified here. This Place Type's form can vary greatly, depending upon the specific uses. However, Industrial areas are often in an insular campus-like setting that features extensive peripheral buffering to mitigate potential impacts to nearby areas, particularly housing.

LARGE CIVIC / INSTITUTIONAL AREAS

This Place Type is usually owned and operated by a governmental entity or some non-profit group, although for-profit academic institutions are also a possibility.

Locations

This Place Type is scattered throughout Tullahoma, but is generally central to the community, which is typical of such uses (which does not include small-scale civic/institutional uses integrated into the Downtown area).

Geographic Form

This Place Type is typically nodal, and sometimes rectilinear, in shape.

Optimal Land Uses

Optimal land uses for the Large Civic / Institutional Place Type are community centers (including the South Jackson Civic Center), schools (often in a campus setting), and religious uses.

and Density & Form

Because of the broad range of specific uses and development forms that might be part of this Place Type, no development densities are specified here. This Place Type's form can also vary greatly, depending upon the specific uses. However, it is often in an insular campus-like setting that features peripheral buffering and is relatively self-contained, as might be found with a school's campus.

OTHER SPECIAL PLACE TYPES

Within the broader Place Type category of Special areas, the remaining ones not yet addressed are Parks & Recreation, Cemeteries and Transportation. *Parks* are not a use that translates into zoning regulations, unlike most of the other Place Types, and recommendations related to individual City parks are contained on [pages 81-83](#) of this plan. Similarly, standards for *Cemeteries* are not typically contained in a municipal comprehensive plan. Finally, the sole areas for the *Transportation* Place Type designated in this plan for Tullahoma are the rail lines. The northwest-southeast oriented line that traverses Downtown, as it did even prior to the Civil War, is operated by CSX, and has the potential for an Amtrak stop to be provided in the future if Amtrak elects to establish a stop in ~~Tullahoma~~ ^{Tullahoma}. The leg extending from that line to the northeast along East Carroll Street is operated by the Caney Fork & Western Railroad (CFWR). It extends northeast 61 miles through Manchester, McMinnville and Sparta. Since the railroad companies and federal regulatory agencies dictate what occurs within the rail line ROWs, standards are not relevant, so none are included here.

and Road & Street Type Principles for Tullahoma

- Roads/streets will respect the natural and built contexts which they traverse ("roads" are rural/suburban and "streets" are suburban/urban).
- Roads/streets will support all modes of travel (where contextually appropriate) to foster the ability for people to choose how they move about Tullahoma.
- Roads/streets will strike a balance between appropriate vehicular operational efficiency and safety for all users, regardless of their choice of travel mode.
- Road/street design will support the types of development and redevelopment appropriate for the Place Types in which they occur.
- The City will work with TDOT and the MPO on facilities under their jurisdictions to achieve roads/streets that are as complete as they can be within the state system ("complete streets").

spell out
MPO
abbreviation

MOBILITY OVERVIEW

This plan section includes a list of planning principles (at left), a summary of the "complete streets" concept (below), a description and graphics for Tullahoma's various Road/Street Types, proposed road/street improvements, and plans for non-motorized travel. This plan section builds upon the City's 2013 and 2019 transportation plans. For the purposes of this plan, the word "road" is applied for natural, rural and some suburban conditions, while "street" applies to some suburban conditions and all urban conditions.

"Planning of the automobile city focuses on saving time. Planning for the accessible city, on the other hand, focuses on time well spent."

Robert Cevero - Transportation Consultant and former faculty member at the University of California, Berkeley

COMPLETE STREETS

Complete Street Characteristics

Complete streets should include one or more of the following features:

- Driving lanes for motorized vehicles
- Parking lanes for on-street parking
- Bicycle lanes for cyclists
- Sidewalks for pedestrians

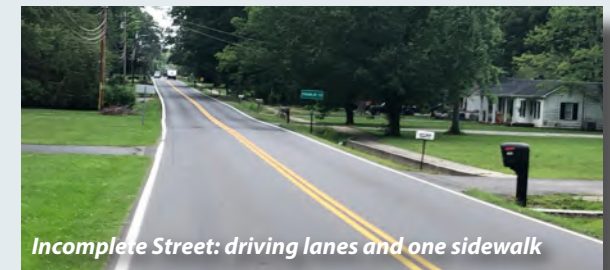
"Complete Streets are streets for everyone. They are designed and operated to enable safe access for all users, including pedestrians, bicyclists, motorists and transit riders of all ages and abilities." - Smart Growth America

Complete Streets Application

This approach may not apply to many streets in Tullahoma, but it might apply to a few key streets (especially collectors). Examples include West-side Drive, Cedar Lane, and East Lincoln Street.

and ROAD & STREET TYPES DESIGN

Road/Street Types might be viewed as the Mobility version of Place Types, which are addressed in the previous plan section. Prior to the consideration of Place Types becoming a common planning practice, the focus was on land uses. However, that approach failed to consider the design and character of places. Similarly, many comprehensive plans of the past focused on the function of roads and streets by categorizing them as arterials, collectors, locals, and with various degrees in between. Road/Street Types, on the other hand, also consider the design and character of these mobility facilities and adjacent corridors. The following pages provide design parameters for the various Road/Street Types identified and proposed for Tullahoma. They are grouped into Rural, Suburban and Urban categories.

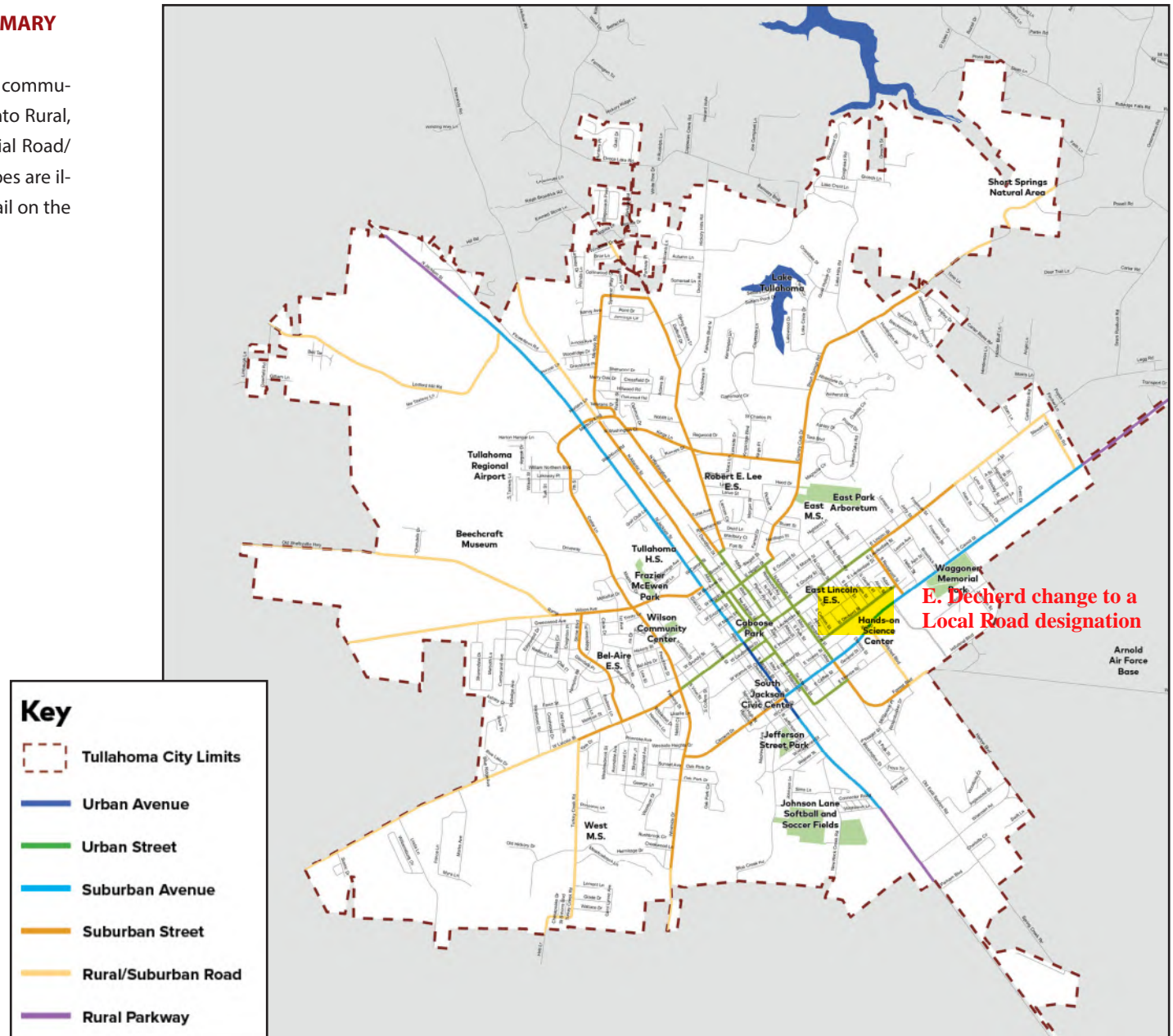


and ROAD & STREET TYPES MAP & SUMMARY

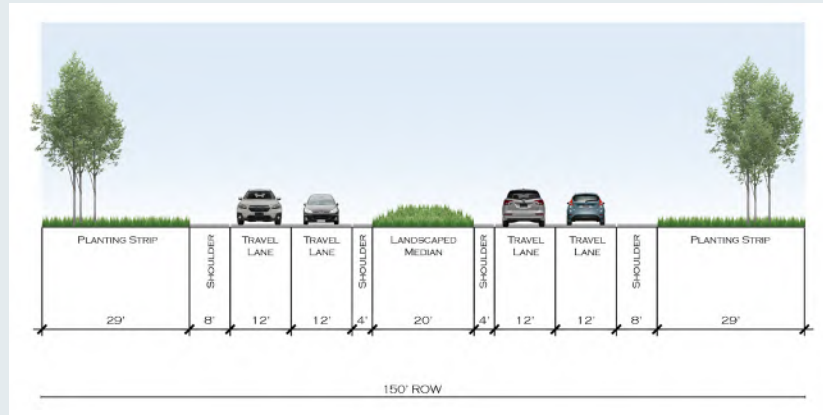
As in the case of Tullahoma's Place Types, the community's Road and Street Types are categorized into Rural, Suburban and Urban Types (Natural and Special Road/Street Types are not applicable). The seven types are illustrated on the map at right, described in detail on the following pages, and listed below:

- Rural Parkway
- Rural Suburban Road
- Suburban Avenue
- Suburban Street
- Local Suburban Street - New Development
- Urban Avenue
- Urban Street
- Local Urban Street - New Development

It is important to keep in mind that Road/Street Types are context-sensitive. Consequently, a single road/street might feature distinct Rural, Suburb and Urban segments based upon the specific areas through which they are passing. Also, while they might often reflect existing conditions, *these Road/Street Types are ultimately aspirational*, as with the Place Types. Thus, a particular road might currently be considered a Rural/Suburban Road, but it might be proposed in this plan as a Suburban Street in the future.



RURAL PARKWAY



Right-of-Way (ROW): 150 ft.

Travel Lanes: Four

- Two 12 ft. wide travel lanes in each direction

Parking Lanes: None

Edge Treatment:

- One 8 ft. wide shoulder on each side
- One 2 ft. wide shoulder between travel lanes and each side of the median

and
Pedestrian & Bicycle Accommodations: none (although shoulders might be used)

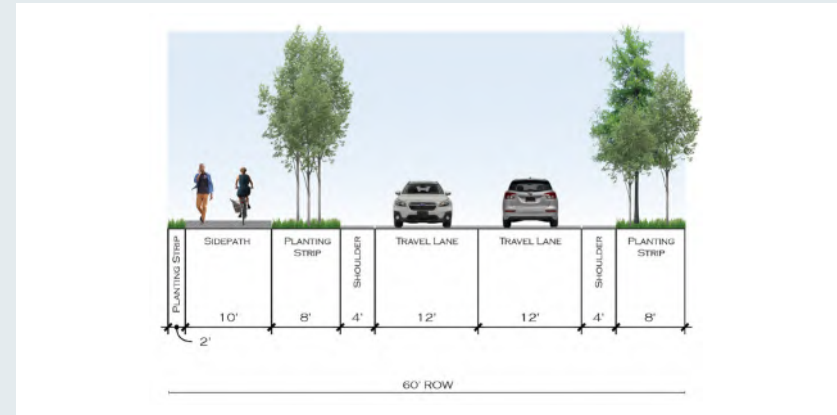
Landscaping:

- One 29 ft. wide planting strip with street trees on the outside of both sides
- One central 20 ft. wide landscaped median

Local Example: New Manchester Hwy. / SR 55



RURAL/SUBURBAN ROAD



Right-of-Way (ROW): 60 ft.

Travel Lanes: Two

- One 12 ft. wide travel lane in each direction

Parking Lanes: None

Edge Treatment: One 4 ft. wide paved shoulder on each side

and
Pedestrian & Bicycle Accommodations: 10 ft. wide side path on one side

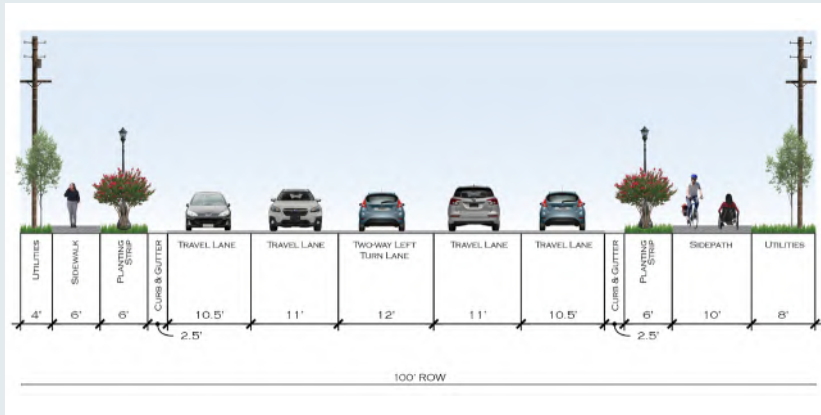
Landscaping:

- One 8 ft. wide planting strip with street trees on outside of shoulder on each side
- One 2 ft. wide planting strip between side path and ROW edge

Local Example: Ledford Mill Road



SUBURBAN AVENUE



Right-of-Way (ROW): 100 ft.

Travel Lanes: Five

- One 11 ft. wide travel lane in each direction
- One 10.5 ft. wide travel lane in each direction
- One 12 ft. wide left turn lane

Parking Lanes: None

Edge Treatment: 2.5 ft. wide curb and gutter on both sides

Pedestrian and Bicycle Accommodations:

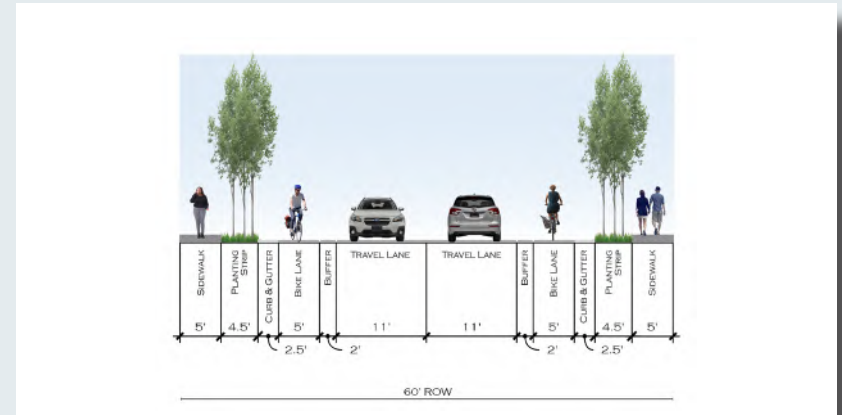
- One 6 ft. wide sidewalk on one side
- One 10 ft. wide side path on one side

Landscaping: 6 ft. wide planting strip with street trees between curb and sidewalk on both sides of street

Local Example: Not applicable



SUBURBAN STREET



Right-of-Way (ROW): 60 ft.

Travel Lanes: Two

- One 11 ft. wide travel lane in each direction

Parking Lanes: None

Edge Treatment: One 2.5 ft. wide curb and gutter on each side

Pedestrian Accommodations: One 5 ft. wide sidewalk on each side

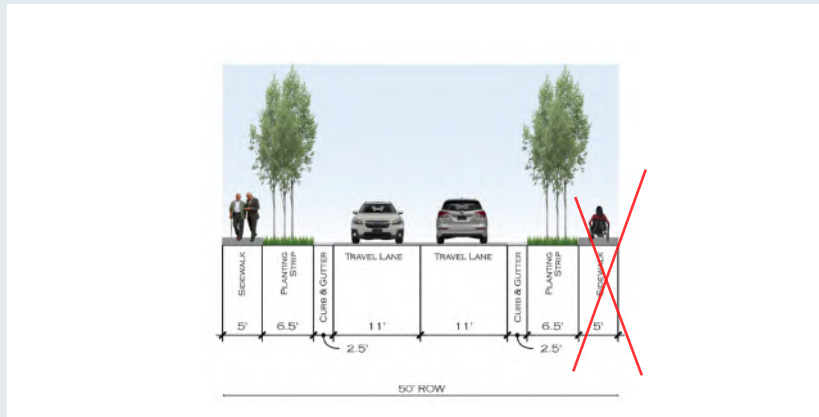
Bicycle Accommodations: One 5 ft. wide bike lane on each side with 2 ft. wide buffers

Landscaping: One 4.5 ft. wide planting strip with street trees between curb and sidewalk on both sides of street

Local Example: Westside Drive



LOCAL SUBURBAN STREET - New



Right-of-Way (ROW): 50 ft.

Travel Lanes: Two

- One 11 ft. travel lane in each direction

Parking Lanes: None

Edge Treatment: One 2.5 ft. wide curb and gutter on each side

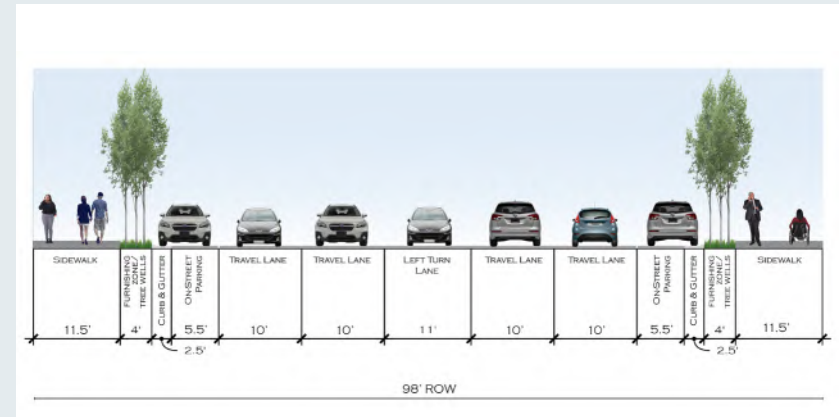
Pedestrian ~~and Bicycle~~ Accommodations: One 5 ft. wide sidewalk on each side ^{one}

Landscaping: One 6.5 ft. wide planting strip with street trees on each side

Local Example: None



URBAN AVENUE



Right-of-Way (ROW): 98 ft.

Travel Lanes: Five

- Four 10 ft. wide travel lanes / two in each direction
- One 11 ft. wide central left turn lane

Parking Lanes: Two

- One 5.5 ft. wide parallel parking lane on each side

Edge Treatment: One 2.5 ft. wide curb and gutter on each side (also part of the parking lanes, providing a total width of 8 ft. for parked cars)

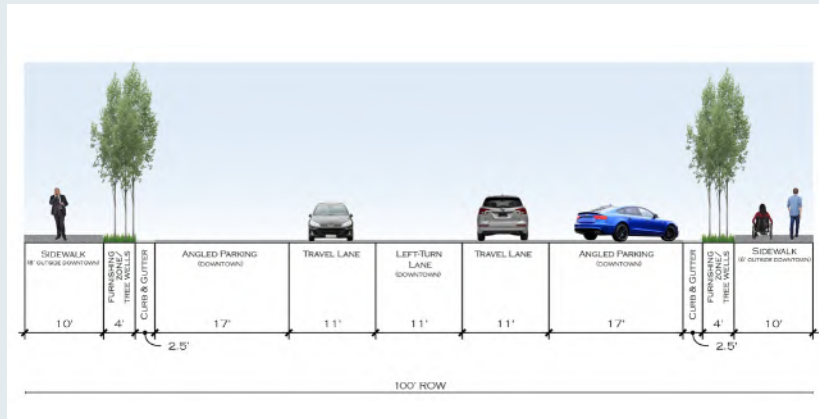
Pedestrian ~~and Bicycle~~ Accommodations: One 11.5 ft. wide sidewalk on each side

Landscaping: One 4 ft. wide planting strip on each side between the curb and sidewalk with street trees in tree wells

Local Example: North ~~and~~ South Jackson Street



URBAN STREET



Right-of-Way (ROW): 100 ft.

Travel Lanes: Three

- One 11 ft. wide travel lane in each direction
- One 11 ft. wide left turn lane

Parking Lanes: Two

- One 17 ft. wide angled parking lane on each side (Downtown)

Edge Treatment: One 2.5 ft. wide curb and gutter on each side

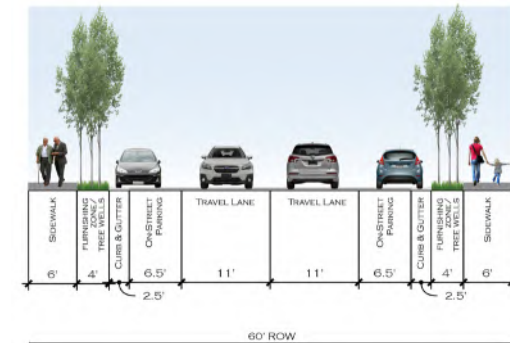
Pedestrian Accommodations: One 10 ft. wide sidewalk on each side (6 ft. wide outside of Downtown)

Landscaping: One 4 ft. wide planting strip on each side between the curb and sidewalk with street trees in tree wells

Local Example: West Lincoln Street



LOCAL URBAN STREET - NEW DEVELOPMENT



Right-of-Way (ROW): 60 ft.

Travel Lanes: Two

- One 11 ft. wide travel lane in each direction

Parking Lanes: Two

- One 6.5 ft. wide parallel parking lane on each side

Edge Treatment: 2.5 ft. wide curb and gutter on both sides (also part of the parking lanes, providing a total width of 9 ft. for parked cars)

Pedestrian Accommodations: One 6 ft. wide sidewalk on each side

Landscaping: 6 ft. wide planting strip with street trees between curb and sidewalk on both sides of street

Local Example: Not applicable



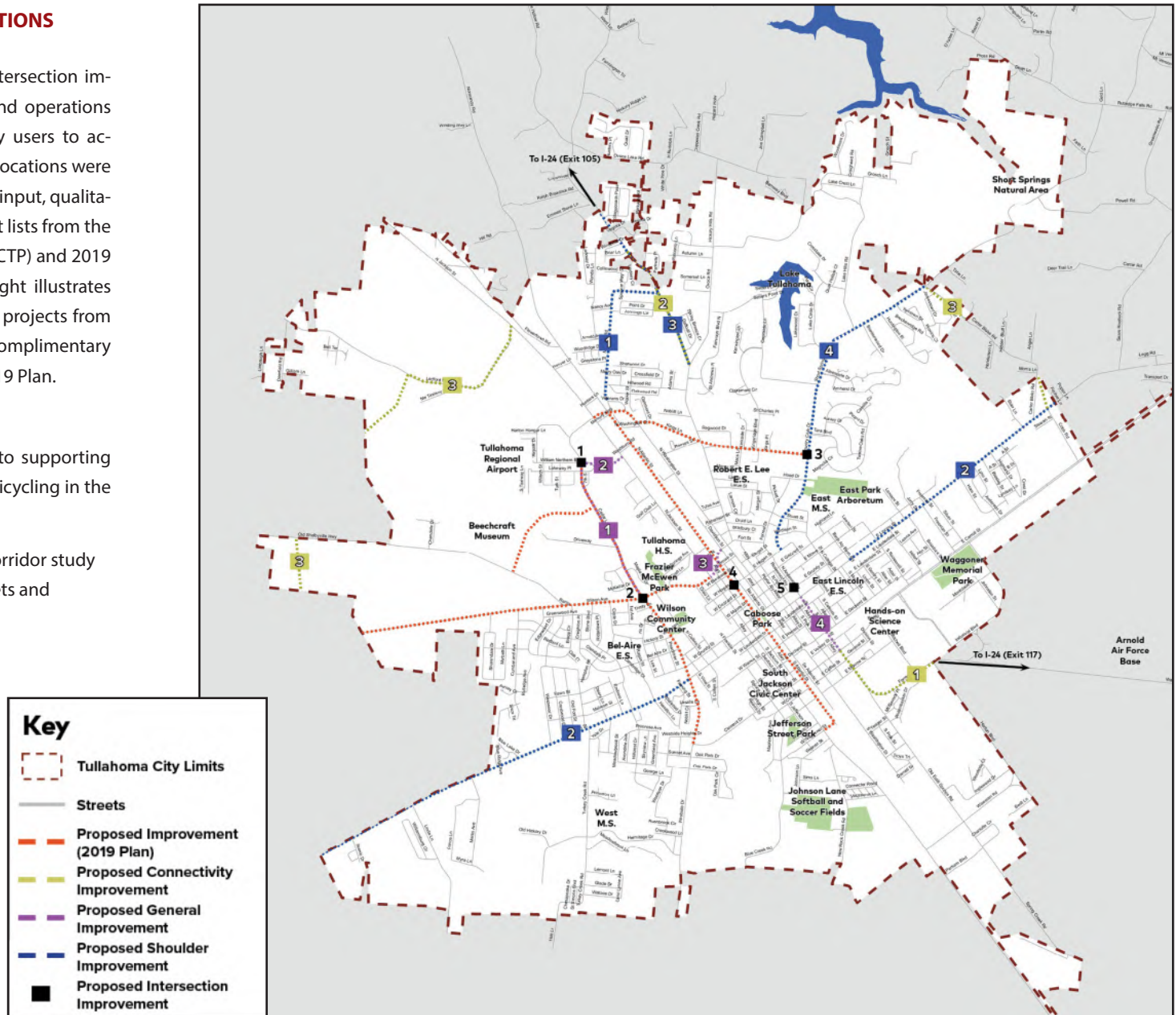
and ROAD IMPROVEMENTS & CONNECTIONS

Recommended near-term roadway and intersection improvements seek to improve the safety and operations of motorized and non-motorized roadway users to accommodate existing and future demand. Locations were identified based on stakeholder and public input, qualitative and quantitative data, as well as project lists from the 2013 Comprehensive Transportation Plan (CTP) and 2019 Community Mobility Plan. The map at right illustrates newly identified and/or reaffirmed priority projects from this planning effort, while illustrating the complimentary critical corridor improvements from the 2019 Plan.

Improvements: General ■

The following improvements are integral to supporting efficient traffic flow and safe walking and bicycling in the near term.

1. *Cedar Lane Improvements* – complete corridor study and implement planned complete streets and streetscape improvements
2. *William Northern Blvd. Improvements* – eliminate Lake Way Place / William Northern Blvd. intersection and add sidewalks
3. *Wilson Avenue / Ovoca Road Railroad Crossing* – explore feasibility of above-grade railroad crossing
4. *Anderson Street Improvements* – implement planned complete streets and streetscape improvements



and ROAD IMPROVEMENTS & CONNECTIONS (CONTINUED)

Improvements: Intersections ■

Further engineering study of the following intersections should be completed to identify improvements that address peak-hour operations and improve safety for those walking, bicycling, and driving.

1. William Northern Blvd. / Cedar Lane
2. Cedar Lane / Wilson Avenue
3. Kings Lane / Country Club Drive
4. Hogan Street / NW. Atlantic Street
5. Anderson St. / Grundy Street

Improvements: Shoulders ■

Paved shoulders provide numerous safety benefits for roadway users, especially in reducing run-off-roadway crashes by increasing vehicle maneuvering space. The following important mobility corridors currently have minimal shoulders, if any.

1. Marbury Road
2. East and West Lincoln Street
3. Riley Creek Road
4. Country Club Drive / Short Springs Road

Increased Connectivity ■

A well-connected roadway network has numerous benefits for both vehicular traffic and active transportation users. As connectivity increases, route options increase, travel distances and times decrease, traffic is dispersed, and walkability and bikeability are improved.

Increased Connectivity to I-24: Freight

Logistics-heavy industries rely upon the transportation network to efficiently move goods. Therefore, these businesses select locations that are easily accessible to the national rail and/or interstate systems. Given the community's desire to increase opportunities in the manufacturing sector, improving accessibility to I-24 is an important component in attracting businesses to the area.

Wattendorf Highway is a few miles longer to I-24 compared to New Manchester Highway/SR 55; however, minimal development, roadway connections, and traffic signals, as well as

generally lower traffic volumes make it a desirable route for accessing the interstate. Further limiting access along this roadway, specifically at AEDC Gates 1 and 2 (via interchanges), would further improve access to not only I-24, but also the Manchester Industrial Park, new truck stop, and weigh station near Exit 117.

This highway, however, is owned, operated, and maintained by the Federal Government. General truck traffic is currently prohibited from using the roadway, as it is designed and maintained for non-freight vehicles. On the heels of new investments in hypersonic testing capabilities at AEDC, the City should work with TDOT, the Federal Government, and state elected officials to explore the potential for improving this roadway to allow for truck access as part of an economic development strategy for the region. This concept would likely require the State to pay for highway upgrades, interchange construction, and long-term maintenance. Large investment bills (e.g., Tennessee's IMPROVE Act and the nation's Infrastructure Investment and Jobs Act) offer potential opportunities to implement such a sizeable investment and effort.



Enhanced access for truck traffic between Tullahoma and I-24 could result in economic gains for the city.

Increased Connectivity to I-24: Commuters and Tourism

Improving connectivity to I-24 (Exit 105) along Riley Creek Road, Lyndell Bell Road, Blanton Chapel Road, and U.S. Highway 41 was also identified as being important for accommodating existing and future demand, especially as the Nashville metropolitan region continues to grow rapidly. The rising cost of living and increase in population has pushed residents further and further out, making Tullahoma an attractive option. For those commuting or traveling to the Nashville region, residents often utilize this connection. Furthermore, this route provides direct access to George Dickel Whisky Distillery and Normandy Lake for tourists traveling along I-24. The identified roadways, with exception of U.S. Highway 41, lack paved shoulders and are curvy in nature. While most of the route is located in the unincorporated County, the City should work with the County and TDOT to ensure that safety and operational improvements keep pace with anticipated growth along the corridors.

and ROAD IMPROVEMENTS & CONNECTIONS (CONTINUED)

Increased Connectivity: In and Around Tullahoma

As part of this planning project, residents have expressed a desire for greater mobility in and around Tullahoma. A few even noted the need for a bypass to circumvent the community, altogether. However, there are numerous factors that make this untenable. A few of these factors include the following:

- Projected traffic volumes and levels of service (LOS) for the year 2040 on Tullahoma's major corridors do not support the need for such a large investment from a traffic engineering perspective.
- The cost of such a facility, particularly the City's required match for federal funding, would be in the millions of dollars and it is already a challenge to maintain existing infrastructure and fund improvements already planned.
- A bypass does not align with the community's desire to revitalize downtown and capture pass-through traffic (i.e., generate local revenue through sales tax).

Tullahoma should, instead, focus on improving the city's existing arterial and collector roadways and signalized intersections, including those identified in the 2013 CTP.



This new Tullahoma subdivision lacks some of the design features that are recommended for future design standards at right, including sidewalks and street trees.

DESIGN STANDARDS

The improvements discussed so far for Tullahoma's roads and streets have been remedial in nature. However, it is important to avoid problems on the front end by having good standards. Relative to the City's current standards, the following recommendations are offered (most or all of these relate to the Subdivision Regulations):

Cul de sacs: The goal for every community should be a well-connected transportation network to make travel easier, more time efficient, more fuel efficient, and to make roads less costly to build and maintain. Consequently, cul de sacs should be discouraged and only allowed when natural or man-made barriers preclude connections, such as steep slopes, water bodies, and railroad lines.

Driveways: Driveways that are excessive in number and/or width decrease the roadway's capacity and increase conflict points, stormwater runoff, pavement maintenance costs, and disruptions to sidewalks. Standards should:

- Minimize the number and width of driveways.
- Consolidate commercial driveways and require cross-access between parcels.
- Encourage or require alleys for narrow-lot subdivisions (50 ft. widths and less) as an alternative to driveways.

Street widths: Typical street sections should be updated to allow for a range of travel lane widths (10'-12') in order to avoid streets being wider than necessary.

Sidewalk minimum widths: Adjust minimum widths to ensure adequate width for comfortable pedestrian movement, including for the mobility challenged. See the Road/Street Type cross-sections on the previous pages to confirm appropriate widths.

Street trees: Street trees should be mandatory for all new subdivisions and development for aesthetic and environmental benefits, as well as for the comfort shade provides to pedestrians during the warmer months.

and BICYCLE & PEDESTRIAN MOBILITY

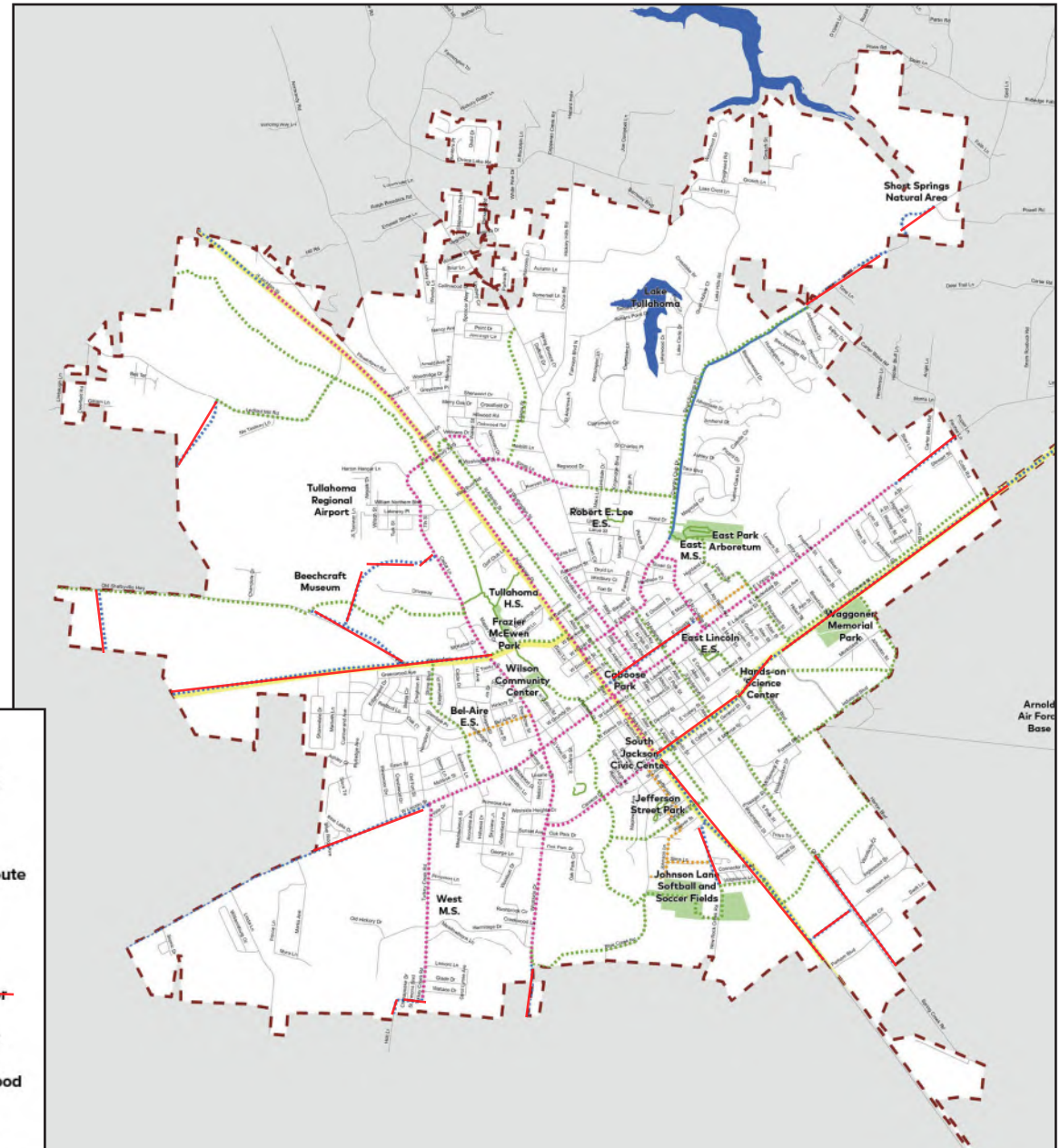
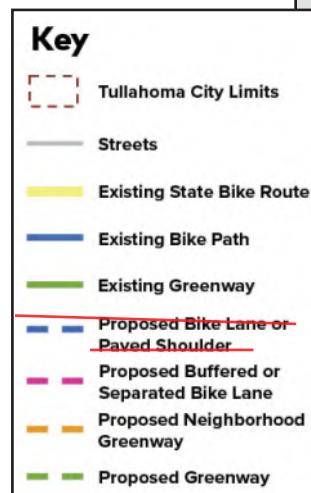
Overview

Safe and comfortable streets for walking and bicycling is a high desire of residents and is an important component to community livability and health. Those walking, bicycling, or using another mobility device are also the transportation system's most vulnerable users given their lack of protection. They should be accommodated to create a more equitable transportation system that offers safe mode choices for all residents. The lack of school buses further supports the need for safe walking and bicycling opportunities (including shared streets), particularly around Tullahoma's schools.

Bicycle Mobility

Tullahoma has limited infrastructure for bicycles, only consisting of a bike path (which resembles and functions more like a sidewalk) along a portion of Country Club Drive / Short Springs Road, leaving most to ride on shared roadways. While many of Tullahoma's residential streets are lower volume and lower speed, most arterials and collectors lack the dedicated infrastructure needed to create safe and comfortable bicycling opportunities for all ages and abilities (i.e., separation and/or protection from vehicles).

The recommended bicycle network provides a long-term vision framework for bicycling infrastructure in Tullahoma. Facility types range from neighborhood greenways, which are essentially shared streets accompanied by traffic calming, signage, and pavement markings, to multi-use paths, both on-corridor and off-corridor along streams and other rail and utility easements. More robust facility types (i.e.,



and BICYCLE & PEDESTRIAN MOBILITY (CONTINUED)

buffered or separated bike lanes) are envisioned for major arterials and collectors, or are identified to have an alternative connection off-corridor, while roadways expected to accommodate fewer (and likely more experienced) bicyclists in less developed areas are envisioned to include a bike lane or paved shoulder of at least 4'.

Bikeway Facility Selection Guide

Should opportunities arise for the City to construct interim facilities or facilities on roadways not specifically identified in this plan, the following basic design criteria for each facility type should be used. Illustrations for these facilities are shown to the right. In general, the greater the traffic volumes and/or speeds, the greater the separation and protection desired for those bicycling.

Neighborhood Greenway

- Maximum Traffic Volume: 2,000 AADT
- Maximum Speed: 25 MPH
- Minimum Width: 4 ft.

Paved Shoulder (rural roadways only)

- Maximum Traffic Volume: 20,000 AADT
- Maximum Speed: 60 MPH

Bike Lanes

- Maximum Traffic Volume: 4,000 AADT
- Maximum Speed: 30 MPH
- Minimum Width: 5 ft. (6 ft. preferred)

Buffered Bike Lanes

- Maximum Traffic Volume: 7,000 AADT
- Maximum Speed: 35 MPH
- Minimum Bike Lane Width: 5 ft.
- Minimum Buffer Width: 2 ft.

Separated Bike Lanes

- Maximum Traffic Volume: 10,000 AADT
- Maximum Speed: 55 MPH
- Minimum Bike Lane Width: 5 ft. (6 ft. preferred)
- Minimum Buffer Width: 3 ft.

Multi-Use Path

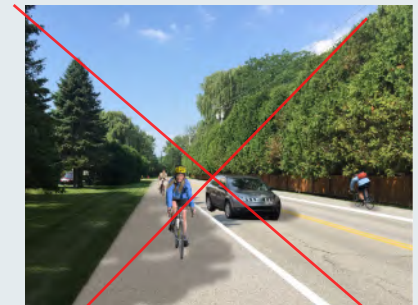
- Maximum Traffic Volume: >10,000 AADT
- Maximum Speed: 65 MPH
- Minimum MUP Width: 8 ft. (10 ft. preferred)
- Minimum Buffer Width: 10 ft. (absolute minimum if adjacent to a roadway with a shoulder / curb and gutter)

Examples of Bicycle Facilities

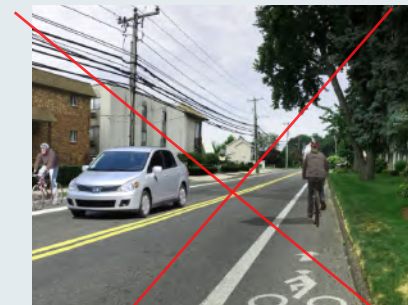
Source: USDOT / Federal Highway Administration - "Bikeway Selection Guide" (2019)



Neighborhood Greenway



Paved Shoulder



Bike Lanes



Buffered Bike Lanes



Separated Bike Lanes



Multi-Use Path

and BICYCLE & PEDESTRIAN MOBILITY (CONTINUED)

Pedestrian Mobility

Like bicyclists, pedestrians use a variety of facilities ranging from shared streets to greenways. Tullahoma currently has approximately 34 miles of existing sidewalks and 3.7 miles of greenways and pathways. Sidewalks are generally located within historic areas and along key corridors, while the greenway system includes the Rock Creek Greenway, as well as pathways on school and park properties. The envisioned pedestrian network for Tullahoma includes both sidewalks and greenways focusing on critical corridors and connections to schools, parks, and commercial areas.

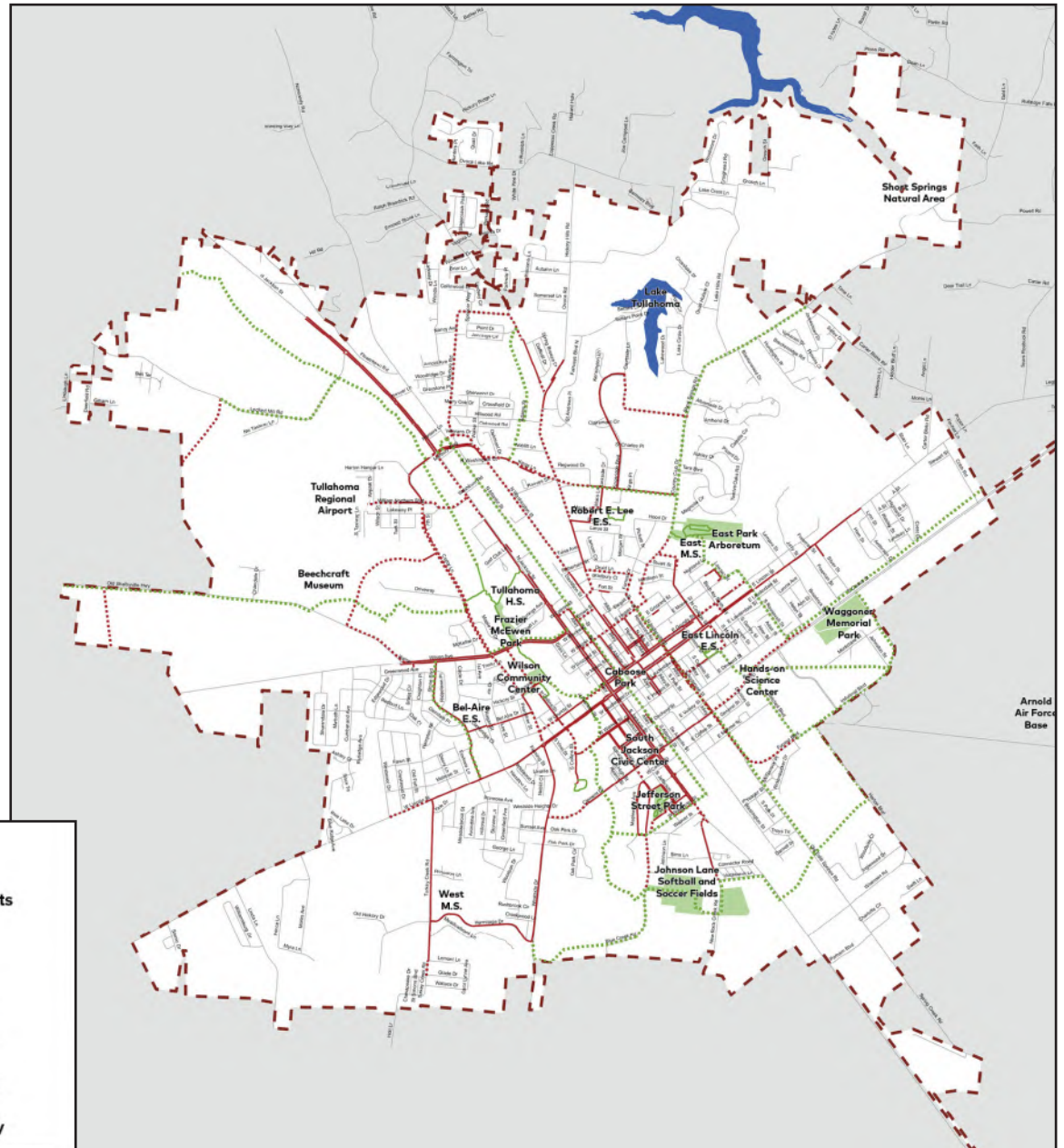
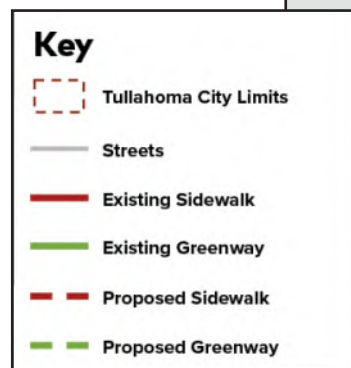
Near-term sidewalk priorities include, but are not limited to, the addition of sidewalks along:

- Cedar Lane, Ovoca Road near Kings Lane and W. Warren Street for those walking to the elementary schools, and
- Along William Northern Boulevard between Cedar Lane and N. Jackson Street.

** Within 1 mile of all schools: along Arterial and Collector roads (sidewalks on both sides) and along Local roads (one side).*

Near-term greenway priorities include:

- Extending the Rock Creek Greenway to Cedar Lane / Forest Gallery Shopping Center
- Extending the Greenway along the West Fork of Rock Creek to connect to the Beechcraft Museum and planned campground
- Constructing a new greenway to provide connectivity to nearby parks and destinations from the envisioned Hap Arnold Library and Aviation History Museum along Industrial Boulevard.



OTHER MOBILITY RECOMMENDATIONS

Additional transportation-related recommendations include the following:

Electric Vehicle Infrastructure

Electric and autonomous vehicles are the major trends in 21st-century transportation, particularly electric in the near term. The State of Tennessee and several stakeholders developed the Drive Electric Tennessee Roadmap in 2018, a framework for addressing primary electric vehicle (EV) market gaps over the next ten years. An important component to achieving this vision is the availability of charging infrastructure. Under the federal Infrastructure Investment and Jobs Act, Tennessee is expected to receive \$88 million over five years for the expansion of the state's EV charging network, as well as the opportunity to apply for grant funding (\$2.5 billion available across the U.S.) dedicated to EV charging.



Currently, Tullahoma has two EV charging stations, one located at the Hampton Inn on North Jackson Street and one at TUA Headquarters. The City should begin to expand charging capacity by installing chargers in highly-visible locations Downtown and at major City buildings. Ideally, DC Level 3 chargers, which provide an 80% charge in 30 minutes, would be installed (and promoted) for Downtown locations to capture tourists and other long-distance travelers as they visit local establishments. Furthermore, the availability of EV infrastructure can be attractive for residents looking to locate in the region, setting Tullahoma apart from other smaller, rural communities.

and Protect & Leverage the Airport

The Tullahoma Regional Airport, a public-use airport, encompasses 594 acres, features three runways, and is home to over 160 aircraft. It is one of 16 regional airports located in Tennessee, and is one of the busiest "small" airports experiencing 30,000+ flight operations a year. The Airport has been, and continues to be, a key asset to Tullahoma's economy for a number of reasons. The Airport Business Park, Chandelle Airpark, Beechcraft Aviation Museum, Vanderbilt LifeFlight, UTSI Flight Research Center, and SkyDive Tennessee call the

Airport home, to name a few. Large events and employers, such as Bonnaroo and Jack Daniel's Distillery, also utilize the Airport for business travel to the region.

SkyDive Tennessee and the Museum draw visitors to the facility and greater community, offering opportunities to encourage local spending (thus, generating sales tax revenue). The Museum's week-long "Beech Party" (i.e., fly-in) continues to expand, drawing 150-160 airplanes from all over the country in 2020. With plans to expand permanent infrastructure for the event, including a campground, the City and Airport Authority should work to support and enhance coming improvements, as well as market the community to these visitors. Finally, alternative sources of income should be evaluated as the State's Aviation grants are expected to significantly decrease over the next five years. Fortunately, however, the federal Infrastructure Act may provide opportunities for relief. For more ideas on better leveraging the airport, see [pages 101-102](#) of this plan's Economic Development strategy.

Monitor Amtrak

Evaluating the feasibility of an Amtrak line connecting Atlanta to Nashville was stalled in the State legislature by the pandemic. However, the Infrastructure Investment and Jobs Act offers funding to complete the study. Tullahoma has initially been identified as a potential stop along the commuter line. The City should closely monitor the outcomes of this study and voice support to the State legislature, TDOT, and other relevant agencies. If a stop is indeed designated for Tullahoma, the station should be located Downtown and within close proximity of businesses that might benefit from the added market support provided by passengers and others associated with Amtrak.

Federal-Aid Highway and Bicycle/Pedestrian Funds

Tennessee is expected to receive \$5.8 billion for federal-aid highway apportioned programs, such as the Surface Transportation Block Grant Program (STBG), and \$302 million for bridge repairs. Communities across the state can compete for dollars to complete important transportation infrastructure projects, such as those previously mentioned. The City should monitor the influx of dollars into these programs and pursue funding for project implementation.



OTHER MOBILITY RECOMMENDATIONS (CONTINUED)

North Jackson Street Streetscape Plan

Jackson Street serves as the spine of the community. A 2019 streetscape plan for the portion between Wilson Avenue and Hoover Lane identified landscaping, hardscape, and infrastructure improvements to support the economic vitality, aesthetics, and pedestrian and bicycle safety of this critical corridor. The City should continue to work to identify funding sources to implement recommendations, while ensuring that codes are being enforced relating to signage, property maintenance, and landscaping. In addition, the City should extend the application of walking and bicycling infrastructure, landscaping, and other principles to Jackson Street south of Wilson Avenue. See [pages 85-86](#) for recommendations on implementing this plan for North Jackson Street.



When respondents to the public opinion survey were asked "What specific types of recreational facilities are needed in Tullahoma?" the vast majority indicated "Greenways/trails." In fact, over 64% of citizens made this selection, with the next most popular facility being community centers / gyms at only 33%.



Sample opinion survey responses from people when asked how they "would like to see Tullahoma change."

"Would like to see safer walking areas downtown. Also improved street paving. Some areas need work, not just country club area."

"Jackson St. needs to update along downtown. Sidewalks need to be put in in residential areas."

"Sidewalks are desperately needed for the kids to walk safely to school."

"More walking sidewalks and bicycle lanes."

"Need to expand and maintain sidewalks on busy streets. e.g., East Lincoln needs to extend sidewalks on the north side, too busy to safely cross. Same street, many sections of the existing sidewalk have fallen into disrepair."

"More sidewalks and crossways for pedestrians."

"The community needs to be more pedestrian friendly."

"The city is not accessible to those without a car. The city needs more walkability. I would love to see a city-wide connected trails system!"

"More sidewalks along busy thoroughfares."

*"More sidewalks for those without cars. None of the side roads have sidewalks **and** it's extremely dangerous for those in our community whom have to walk. Especially for the CHILDREN who walk home!!!"*

"Sidewalks and crosswalks along Jackson."

"More sidewalks, better parking downtown, bike paths... to be able to get around town safely with or without a vehicle."

"More choices for pedestrian movement."

"Shoulders for high traffic roads. Why are there no shoulders on the roads in this town?"

"Improved traffic flow and better connectivity to I-24."

INFRASTRUCTURE

The term “infrastructure” encompasses a broad range of issues. Because topics such as roads, streets and non-motorized transportation facilities were previously addressed within the “Mobility” section, this section relative to infrastructure will focus on utilities such as public sewer and water, electricity, gas and telecommunications. These services are critical to the functioning of any community, and their availability can greatly impact a community’s growth.

Sewer

The Tullahoma Utilities Authority (TUA) serves a large percentage of Tullahoma’s acreage with sewer. The system consists of 200 miles of sewer line, 42 lift stations, and a wastewater treatment plant.

Sewer Recommendations:

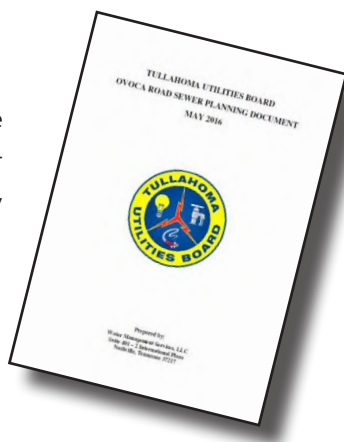
- Ensure the wastewater system plan for both incorporated and unincorporated areas within Tullahoma’s UGB is consistent with the Comprehensive Plan, specifically the Place Types plan.
- Coordinate with other utility providers and transportation agencies regarding expansion, extension, and maintenance projects for possible consolidation of rights-of-way and/or project bundling to minimize disruptions and project costs.

Water

Normandy Lake serves as Tullahoma’s water source, which TUA purchases from the Duck River Utility Commission. A system of 270 miles of water mains serves 10,500 customers who consume approximately 3 million gallons each day.

Water Recommendations:

- Continue to work with the Duck River Utility Commission to help ensure the availability of a reliable, high-quality water supply for all households and businesses in a manner consistent with this Comprehensive Plan and protection of the natural environment.
- Implement stormwater management and land development best practices to support the overall health of the Duck River watershed, one of the most biologically diverse river



of its size in North America.

Electricity

TUA is a distributor for the Tennessee Valley Authority (TVA), providing 11,000 customers with reliable, public power. Over 250 miles of distribution lines and two 161 kV substations make up the system.

Electricity Recommendations:

It is recommended that the City continue to require that all electrical lines be buried for new development. If future Downtown streetscape redevelopment projects occur, overhead lines should be buried (or moved to alleys at a minimum, as has already occurred).

Gas

The Elk River Public Utility District (ERPUD) provides natural gas to Coffee and Franklin Counties, serving around 17,000 customers.

Gas Recommendations:

- Work with the Elk River Public Utility District (ERPUD) to ensure that service is available for locations within Tullahoma and its Urban Growth Boundary (UGB).
- Consider local rebates/incentives to encourage homes and businesses to be more energy efficient.

Telecommunications

TUA’s fiber-optic division, Light-Tube, provides television, internet, and telephone through a fiber-optic system across the city. In 2013, Tullahoma became a “gigabit city,” providing affordable and fast internet that is significantly faster than the average broadband speed in the US. See the map on page 17 of this plan for information on fiber service areas.

Telecommunications Recommendations:

- Market Tullahoma’s 1-gigabit municipal internet service to draw residents and businesses as part of an economic development strategy, while maximizing existing community investments.
- Explore opportunities to work with telecommunication providers to expand quality cellular service in the area.



INFRASTRUCTURE (CONTINUED)

Stormwater Management

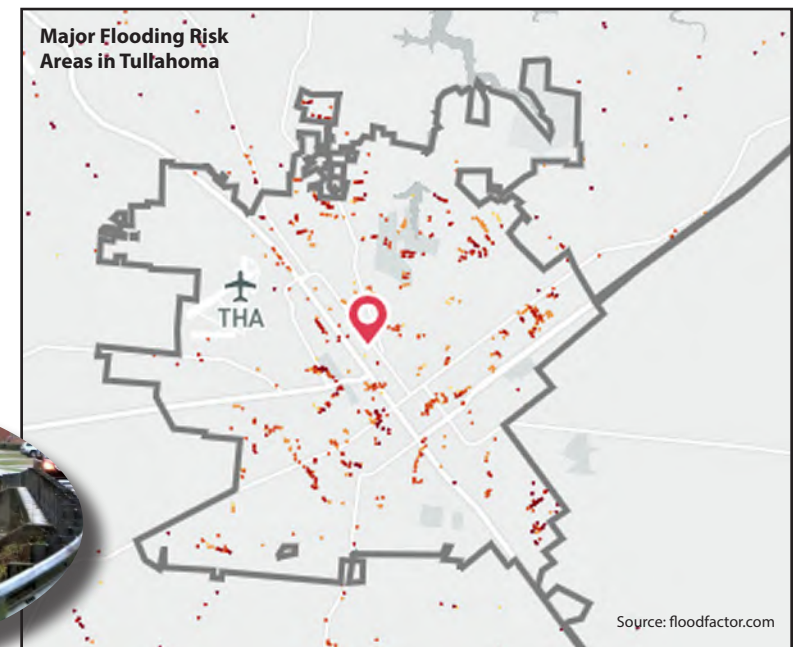
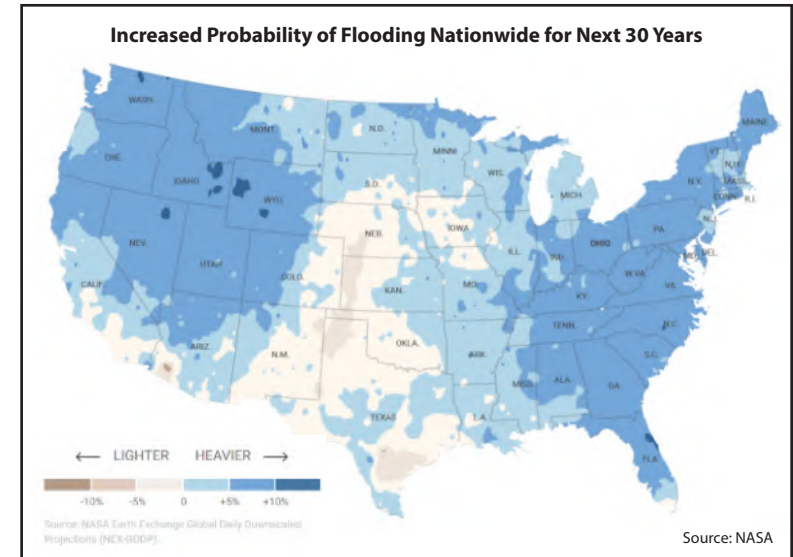
Background

According to NASA Earth Exchange, the portion of Tennessee that includes the City of Tullahoma is from 5% to 10% more likely to experience a 100-year flood event in the next 30 years, as illustrated on the map at right. There are 630 properties in Tullahoma that have greater than a 26% chance of being severely affected by flooding over the next 30 years. This statistic represents 7% of all properties in the city. In addition to damage on properties, flooding can also cut off access to utilities, emergency services, transportation, and may impact the overall economic well-being of an area. Overall, Tullahoma has a moderate risk of flooding, meaning flooding is likely to impact day to day life (source: floodfactor.com).

Recommendations

The problem of localized flooding will increase as extreme weather events continue to produce more flood events, while water quality is important for the region's sustainability. Therefore, the City should:

- Expand City stormwater inspection and drainage maintenance capabilities by increasing staffing.
- Consider upgrading existing City retention/detention facilities as new, more efficient technologies evolve.
- Continue and expand the City's program of drainage maintenance to include pipe cleaning, debris removal, and inlet cleaning.
- Pursue grant funding, such as the EPA's Building Blocks for Sustainable Communities Program, to develop a green infrastructure plan that identifies key green corridors to improve community resiliency and support outdoor recreation opportunities, as well as wildlife habitat.
- Explore a program that includes off-site stormwater mitigation or payment into a stormwater fund.
- Continue to educate citizens, elected officials, and decision-making bodies on the importance of stormwater management.
- Continue to work with TDEC to implement Tullahoma's submitted plan for requiring permanent stormwater pollutant removal for development/redevelopment projects.
- Consider expanding opportunities for the disposal of household hazardous materials/liquids to avoid illegal dumping (i.e., negative impacts to surface water and groundwater).



INFRASTRUCTURE (CONTINUED)

Green Infrastructure

Typical stormwater management in the City of Tullahoma has consisted of open ditches, closed piping system, and detention ponds. While this treatment may have met the immediate need for stormwater management at the time it was designed and constructed, it no longer functions in a holistic manner in which modern stormwater management is expected to perform. Stormwater systems can no longer be expected to only carry water, but they must also fulfill other community objectives, such as:

- Sustaining and improving water quality through natural filtering
- Providing open space for public enjoyment
- Providing linear facilities for public recreation (greenways, etc.)
- Providing habitat for wildlife habits

Green infrastructure should be considered as an alternative to traditional approaches. Tullahoma's development standards should encourage (or even mandate) the following:

- *Bioswales*: used to move rain water to another location, while absorbing some of it.
- *Rain gardens*: bioswales move water to rain gardens, where it is held and absorbed.
- *Wetlands restoration*: restoring the natural hydrology and introducing wetlands plants.
- *Impervious surfaces*: permeable paving surfaces in parking lots, etc.



Source: American Society of Landscape Architects

Bioswales can be installed between a street's curbing and the planting strip. They are designed for stormwater to drain into them so the water can be absorbed into the soil and plant materials to protect the more conventional drainage systems from being overwhelmed.

FACILITIES

Page 18 of this plan maps and summarizes Tullahoma's primary community facilities. Using the same four categories as that page, below are suggestions for facilities:

Public Schools

Tullahoma's public schools are a very positive asset to the community. The school district, which conducts its own planning, is currently considering the following improvements:

- Expansion of Farrar Elementary School
- Replacement of Tullahoma High School
- Remodeling of East Middle School
- Studying the feasibility of a fifth elementary school in Tullahoma's northern area

Emergency Services

The City's most recent achievement regarding emergency services is the development of a new police headquarters, but the following other improvements should be pursued:

- Explore the feasibility of a third fire station
- Provide updates to Fire Station #1
- Explore the feasibility of an Emergency Shelter

Cultural Venues

See Appendix D for an analysis on the potential to establish a new event venue for the area.

- New library (perhaps Downtown)
- City museum (perhaps Downtown or at the South Jackson Civic Center property)
- Red Cross building renovation
- New amphitheater (proposed for Downtown per plan)

"I would like to see a plan for the future that includes a new library with more space for community programming and greater technological services. The current library has expanded as far as it can."

Public Opinion Survey

Other Facilities

The City's current top goals are: 1) Renovating City Hall, including repurposing the former police department space; and 2) Constructing a new maintenance equipment building.

NATURAL RESOURCES

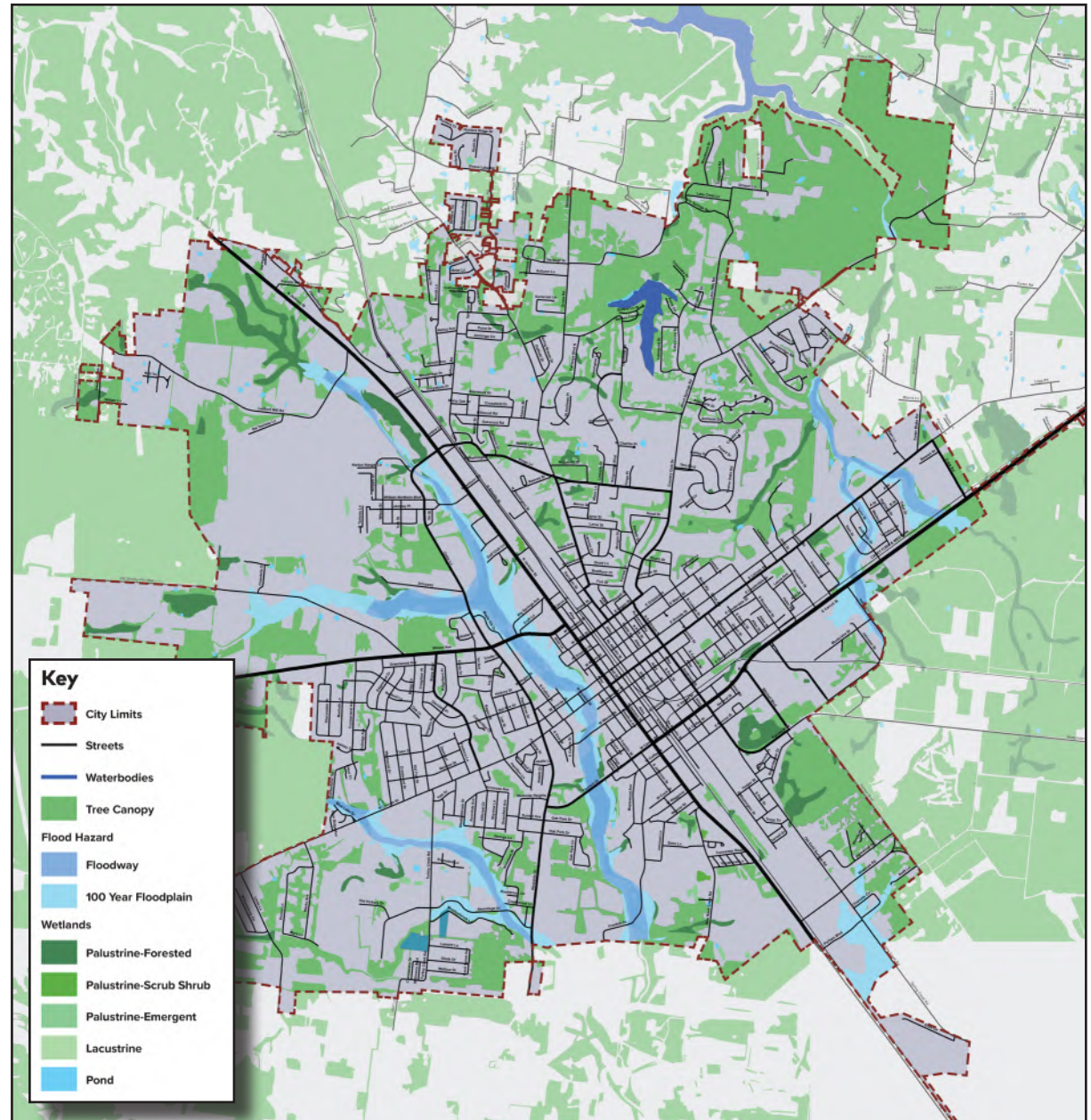
Pages 7-10 of this plan include information and a series of existing conditions maps related to natural resources. Recommendations for the protection of Tullahoma's natural resources are focused on water resources and trees, as mapped at right and explained below.

Water Resources

Water bodies, wetlands and floodplains are an important habitat for plant and animal species, particularly endangered species. They also pose a serious barrier to development and a hazard to safety for both people and their property. State buffer requirements already exist for development near water bodies, so that issue does not call for duplicative policies from the City. Also, pages 75-76 of this plan provide recommendations for stormwater management and the City's recommended utilization of "green infrastructure" standards, whether voluntary or mandatory. This plan's primary recommendations for water resources focus on floodplains and streams.

Discourage the disturbance of floodplains

While development is technically prohibited within floodplains (from an elevation perspective), development can still occur through the addition of fill material in floodplains that raises the elevation of the grade level to a safe condition. However, such a system can be problematic, as floodplain maps are often inaccurate since floodplains are constantly changing, and isolated development can be cut off from access by surrounding flooded areas. Consequently, *it is recommended that the disturbance of floodplains in Tullahoma be discouraged.* Below are a few alternatives to consider:



NATURAL RESOURCES (CONTINUED)

- *Limiting the amount of floodplain that can be disturbed:* First, as the map on the previous page reflects, the amount of acreage occupied by floodplains in Tullahoma is relatively limited, particularly when the floodway areas are subtracted. Floodway areas are already off limits for development in any circumstances. This option would be to limit the amount of disturbance that can occur by requiring either: 1) Any development within the floodplain shall leave undisturbed a minimum of fifty percent (50%) of the natural floodplain area, including all of the floodway area, or 2) All of the floodway area, plus fifty feet (50 ft.) on each side of the waterway, whichever is greater, be left in its natural state.
 - *Transfer of Development Rights (TDR):* TDR is a tool that helps to compensate property owners who have their land's development potential reduced by regulations. ^{in the floodway.} It involves first designating on a map two distinct areas - "sending" areas and "receiving" areas. Sending areas are the lands being protected by eliminating or lessening their development potential. The receiving areas are those where increased development density is sought, such as in and near a downtown or a new mixed-use center. TDR allows land owners in the sending areas to sell density credits to developers to apply to the receiving areas to exceed the zoned density. Thus, the prohibited density in the sending areas is sent to the receiving areas as part of a development credits market.
- Challenges clearly exist to installing a TDR program. First, a study must be conducted to determine that it is viable from a real estate market and economics perspective. In short, will there actually be demand for density credits and will the local development community embrace such a system. Also, City staff have to be equipped to be able to operate a TDR program, which is not easy in smaller communities with less staffing.
- *Other potential incentive programs:* If the City is interested in protecting floodplains, other types of incentives might be explored. They might be tied to either: A) greater density for lands not impacted by floodplains (like TDR, but shifting densities within a single large site); or B) some type of property tax and/or development fee reductions.

Continue to pursue clean-up efforts for streams

According to the Tennessee Department of Agriculture (TDA), non-point source pollution (NPS) is the nation's largest source of water quality problems and is the main reason that

40 percent of surveyed rivers, lakes and estuaries are not clean enough to meet basic uses such as fishing and swimming. NPS pollution occurs from a range of sources, including agriculture, forestry, grazing, septic systems, recreational boating, urban runoff, construction, physical changes to stream channels, and habitat degradation. To address this issue, Congress established the Nonpoint Source Program funded by the EPA through Section 319 of the Clean Water Act, and TDA administers the program in Tennessee. The City recently applied for a 319 grant from TDA to clean up a segment of Rock Creek traversing the Airport property, as this segment is on the State's list of impaired and threatened waters. The grant program requires a 40% match from the municipality, but some of that can be in-kind services. If the City is successful in securing a \$90,000 grant for the estimated \$150,000 project cost, and *if the project proves to be a success, it is recommended that additional stream clean-up projects be pursued for Tullahoma in the future.*

Sample opinion survey responses from people when asked how they "would like to see Tullahoma change."

"Quit destroying woodland areas to build housing."

"More progressive with sustainable infrastructure."

"I would like to see more trees."

Trees

As explained previously on [page 10](#) of this plan, trees provide many environmental benefits. The following recommendations are offered:

Recommend

Require street trees as part of the City's subdivision regulations

There should be minimum spacing requirements to ensure a sufficient number of trees, and there should be minimum caliper sizes. Trees will also increase the aesthetic value.

Consider adopting a tree preservation ordinance

Many great model ordinances exist from across the country. Common features include:

- Require a tree inventory for sites prior to land disturbance.
- Focus the inventory and protections on species having environmental value and exceeding a minimum caliper (6+ inches).
- Require no net loss of environmentally valuable trees after development, and perhaps even exceeding the original number.

CULTURAL RESOURCES

Notwithstanding the cultural resources already addressed within the section of this plan addressing cultural venues as part of the public facilities discussion (pages 73), such as the library, Tullahoma's primary cultural resources consist of historic buildings. While historic buildings are located throughout the community, they are particularly prevalent in and around the historic Downtown. The development history of Tullahoma was overviewed on pages 4-6 of this plan, and below are recommendations for historic resources.

and

Local Historic Districts & Design Guidelines

Tullahoma has two National Register (NR) Historic Districts (see map on page 29). The North Atlantic Street district consists of a few blocks just north of the Downtown core that straddle both sides of the railroad tracks. The North Washington Street district, to the immediate north, consists of only a few residential lots. Although NR designation brings awareness and helps with financial incentives through the investment tax credits for historic building rehabilitation, it offers no protections for historic resources. The only exception is the limited protections from the Section 106 review process for federally-funded and licensed projects negatively impacting resources (road widenings, etc.). Consequently, the following recommendations are offered:

Explore the Designation of Local Historic Districts

It is recommended that the designation of local historic districts with actual protections be explored for both Downtown and the surrounding historic neighborhoods. In addition to NR districts, the map on page 29 also shows local districts that have been proposed in the past. In fact, Section 408 of the City's Zoning Ordinance has provisions for designating and regulating local districts, but none have been designated yet. Thus, the following approach is recommended for this objective:

1. *Prepare public information regarding districts designation.* The differences between the process and benefits of NR designation and local designation are considerable, so both should be addressed. The pros and cons of local historic districts should be covered in an objective, clear and balanced manner.
2. *Disseminate the public information.* Once prepared, the information should be provided to the public on the City's website and in the form of hard copy brochures for people

who do not utilize the internet.

3. *Hold a series of area-specific meetings.* Multiple public meetings should be held in the areas where districts are being considered. The City should solicit the attendance of staff from the Tennessee Historical Commission (CLG Coordinator) to help explain local historic district designations.
4. *Pursue local designations where support exists.* District designations work best when a substantial majority of affected property owners support designation.
5. *Prepare design guidelines.* Guidelines are implemented through a design review body (preservation commission) and they should address both the treatment of existing buildings and the design of new buildings.

While these recommendations have centered on locally-designated districts since those are the type with actual protections, the geographic expansion of the two small NR districts should be pursued as well, perhaps on a parallel track. Expanding the NR districts will expand the potential for property owners to take advantage of investment tax credits for historic building rehabilitations.



Prepare Design Guidelines

Even if local districts are not designated, the City should still pursue the preparation of design guidelines for the historic areas, for the following reasons:

- They can serve as a resource for historic property owners
- They can be incentivized by requiring that they be followed to get financial incentives
- If they are initially voluntary, the community may develop enough of a comfort level over time to support their adoption as mandatory standards.

CULTURAL RESOURCES (CONTINUED)

Incentives for Building Rehab

Promote Federal Investment Tax Credits for Historic Building Rehabs

Owners of National Register (NR) properties (and eligible properties) who pursue qualified building rehabilitation projects are eligible for federal investment tax credits. Taking advantage of this incentive, a federal tax credit worth 25% of the total project costs, requires:

- The project costs must exceed the property's adjusted cost basis (investments to date)
- The property must be income-producing (which can include residential if rental)
- The project must follow federal preservation standards (Secretary of the Interior's)

Since many people are unaware of this financial incentive, it is important that the City vigorously promote it. However, until the existing small NR districts are geographically expanded, this incentive will have very limited benefits unless individual property owners pursue designations, which is a viable option throughout the city.

Consider a Payment in Lieu of Taxes (PILOT) Program

PILOT is an incentive program enabled by the State that allows municipalities to lease government-owned property to private businesses at an alternative amount associated with a cost of development or job creation, rather than the normal property tax amount that would be due on the property. Some jurisdictions, such as Shelby County, Knox and Hamilton Counties, have used PILOT programs to leverage economic development and private investment, particularly rehab/reuse of buildings and developing manufacturing facilities.

Certified Local Government (CLG)

Pursue CLG Status by Establishing a Comprehensive Preservation Program

CLG status is provided by the Tennessee Historical Commission (THC) for local governments that have a comprehensive historic preservation program. Features of CLG programs include a historic preservation ordinance, locally-designated historic districts, a preservation commission, and design guidelines to apply to properties within the local districts. CLGs are qualified for a special funding source that is allocated annually by THC for various preservation projects. If the City follows this plan's recommendations for achieving a preservation program, CLG should then be pursued as well.

Atlantic Street: Then ^{and} Now



The top photo is Atlantic Street in 1910, versus its appearance today, as depicted below. The facades of most of these buildings have been substantially altered, and not in a positive way. Local historic district designation applied years ago might have salvaged much of the original appearance, but it is never too late.



EVALUATION OF CURRENT FACILITIES

Pages 19-20 of this plan list and map out all 13 of Tullahoma's existing parks and community centers. This information also features a map showing the service area for active recreational parks in 1/4 mile and 1/2 mile radii relative to surrounding populations. When the facilities inventory was initially mapped for this project, Silver Street Park was still in the planning stage, but it is now being developed and constitutes a 14th facility.

NRPA Park Metrics

Until recent years, the National Recreation ^{and} Parks Association (NRPA) maintained a set of "standards" for communities to provide parks and recreational facilities based upon their population. However, the NRPA recently abandoned such standards, as explained below in a 2019 article posted on their website:

"There is not a single set of standards for parks and recreation that could possibly encompass the uniqueness found in every community across the country. Communities vary greatly by size, needs and desires; so too should their park and recreation agencies' offerings."

Consequently, the NRPA has since steered away from standards and now speaks in terms of "metrics." The table at right details how Tullahoma's existing park and recreation facilities measure up against the NRPA metrics. To echo what NRPA now stresses, every community is very different and no one size fits all. Regardless, below is a summary of the key findings from the table at right.

Substantially Exceed

Relative to the NRPA metrics, Tullahoma substantially exceeds them for the following facilities:

- Park lands
- Baseball fields
- Softball fields
- Soccer fields

Substantially Short

Relative to the NRPA metrics, Tullahoma falls substantially short for the following facilities:

- Multi-use courts/fields*
- Skate parks - 0
- Ice rinks* - 0
- Dog parks - 1

* May be a non-issue

Comparison of National Statistics vs Tullahoma

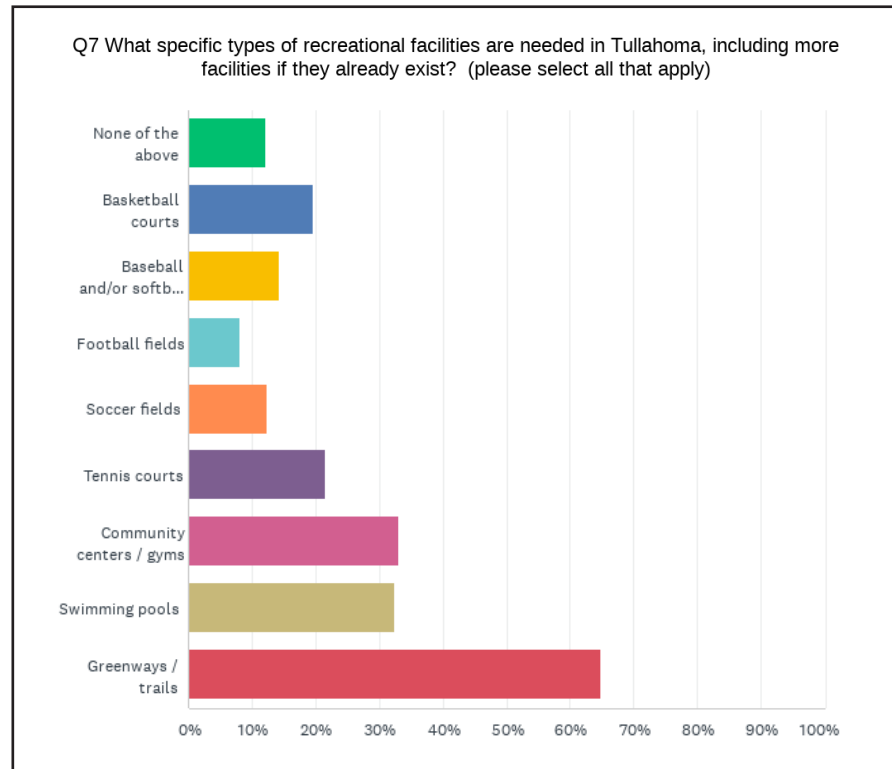
Below is a comparison of Tullahoma with the national median number for communities of 20,000 people and less. The number of park acres and facilities for an average community of 20,000 people are compared with Tullahoma. The actual number of acres/facilities are indicated in parenthesis (), while the numbers not in parenthesis represent the park acres per 1,000 people or the number of people per facility.

Resource Type	National Med. #s		Tullahoma #s	
	Acres Per 1,000 Pop.	Total Acres	Acres Per 1,000 Pop.	Total Acres
Parks	12	(240)	30	(605)
Facilities	People Per Facility	Total Facilities	People Per Facility	Total Facilities
Playgrounds	2,523	(7.9)	3,333	(6)
Basketball courts	4,090	(4.9)	5,000	(4)
Tennis courts	2,922	(6.8)	3,333	(6)
Multi-use courts	7,866	(2.5)	10,000	(2)
Baseball fields	7,804	(2.6)	3,636	(5.5)
Softball fields	5,072	(3.9)	3,636	(5.5)
Soccer fields	3,294	(6.1)	2,500	(8)
Multi-use fields	4,683	(4.3)	NA	(0)
Swimming pools	8,023	(2.5)	10,000	(2)
Skate parks	10,118	(2.0)	NA	(0)
Ice rinks	9,860	(2.0)	NA	(0)
Dog parks	10,000	(2.0)	20,000	(1)

Although Tullahoma has two football fields, there are no national standards for football fields. Tennis courts are located on the Arnold air force base. Since there are 11 fields that serve both baseball and softball, that figure has been split in two for this table.

PUBLIC INPUT

Appendix A includes the results of the public opinion survey conducted for this plan. One question focused specifically on parks and recreation. Below is a summary of the results.



Clearly, the most popular recreational facility is greenways/trails, at nearly double the demand for the next highest rated facility (community centers/gyms). The next most demand is for swimming pools and tennis courts. Tullahoma's number of existing pools are close to the national average, as are tennis courts. While the existing six tennis courts are not part of public parks, four are located at the high school and two are at the air force base.

RECOMMENDATIONS

In addition to continuing to pursue funding to rebuild Imagination Station, the following recommendations are provided for the City's Parks ~~and~~ Recreation Department.

Projects in the Works

These projects are already occurring now and should obviously be completed:

- *Waggoner Park* – improvements (see site plan alternative below)
- *Johnson Lane Park* - expansion
- *Silver Street Park* – new park

New Facilities to Pursue

Based on the NRPA metrics and public input, the following facilities should be pursued:

- *Basketball courts* - only a few are needed
- *Pickle ball courts* - none exist, but popular
- *Skate park* - none exist
- *Dog park* - only one exists at present
- *Short Springs parking and restrooms* - at intersection of Powell Road & Short Springs Roads

Change image to Johnson Lane or Silver Street Site Plan



RECOMMENDATIONS (CONTINUED)

Rock Creek Park

This concept for a major new park in Tullahoma has been recently proposed by a group of visionary private citizens. The property in question, illustrated below, is comprised of floodplain along Rock Creek, so it has very limited development potential. Because it is privately owned, the owners would need to be willing sellers to the City or a non-profit group well-suited to own the park. Regardless of ownership, maintenance would likely fall to the City's Parks & Recreation Department. *The vision is that Rock Creek Park could essentially become Tullahoma's Central Park.* The park, and a future greenway traversing it, would provide a physical connection with Cascade Park and the other nearby facilities, including Imagination Station, D.W. Wilson Community Center and the library. While the park could contain limited recreational facilities, such as a children's playground, it would be primarily intended to passive recreation and special events. See [pages 87-88](#) regarding potential new development that might occur adjacent to this proposed park.

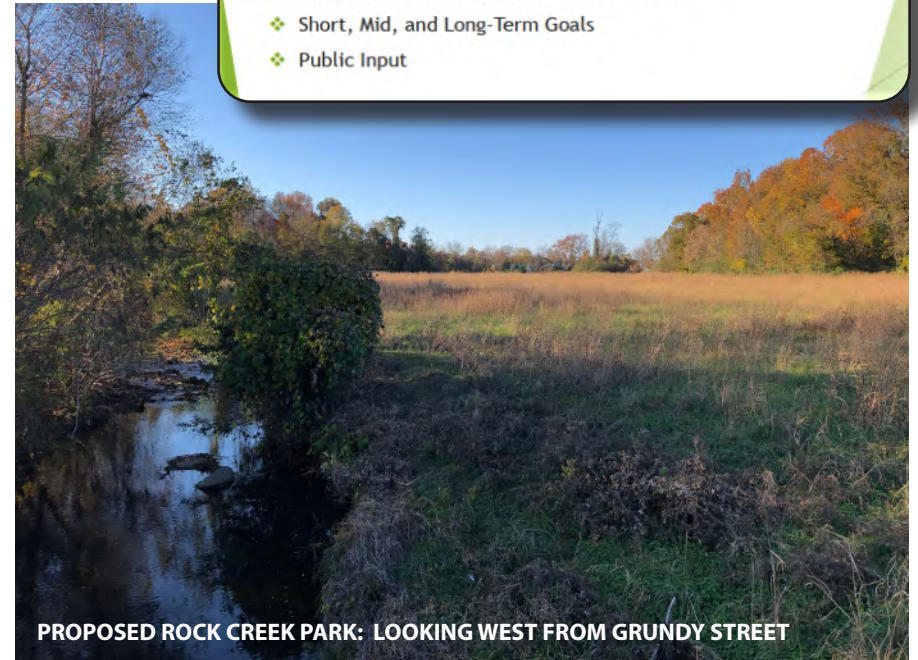


Parks & Recreation Master Plan

A citywide comprehensive plan, such as this one, can only go into a certain amount of detail for any given topic. Consequently, it is recommended that the City ^{continue} pursue the creation of a detailed Parks & Recreation Master Plan. In particular, such a plan is needed for the City to acquire Local Parks and Recreation Fund (LPRF) grants from the Tennessee Department of Environment & Conservation (TDEC). At right is a list created by TDEC for the requirements of a plan that can qualify for LPRF grant funding.

Minimum Components of a Parks and Recreation Systemwide Master Plan

- ❖ Strategic Planning type component including a focus group that represents a cross section of the community. A Strength, Weakness, Opportunity, and Threat (S.W.O.T.) Analysis is often included.
- ❖ Community Recreational Needs Assessment/Survey
- ❖ Facility inventory with facilities and current conditions included
- ❖ Parks and Recreation Program offerings list
- ❖ Short, Mid, and Long-Term Goals
- ❖ Public Input



DESIGN PRINCIPLES

A primary objective of this Comprehensive Plan is for Tullahoma to benefit in the future from more attractive, pedestrian-friendly and sustainable neighborhoods and mixed-use districts. The City's existing development regulations should be adjusted to achieve this objective. Below is a summary of important design principles to follow:

Walkability

A pedestrian-friendly environment is not based merely on the provision of sidewalks, although sidewalks are obviously an important starting point. An area must also be safe, interesting, attractive and comfortable to attract pedestrians. Such areas are lined with storefronts and street trees rather than blank walls and parking lots. Parking lots should be located behind buildings to encourage walkability within urban areas.

Mixed Uses

Another way to promote walkability is to develop areas with a mixture of land uses located within convenient proximity to one another. The potential should exist for someone to live, work, shop and play within the same general vicinity rather than having to drive from place to place. Many people are either too young, old or financially-challenged to be able to own, maintain, insure and operate a motorized vehicle, so their limited means should be accommodated through better community design.

Calming of Motor Vehicles

The term "traffic calming" often refers to remedial measures taken by communities to slow down speeding traffic through techniques such as speed bumps/humps/tables, traffic circles, chicanes, neckdowns, chokers, pedestrian bulbs, road narrowings, raised intersections, and changes in road texture. However, it is important that streets be designed from the beginning for people rather than only motorized vehicles.

Generous Landscaping

Landscaping can bring many advantages to the built environment. First, plant materials provide environmental benefits, including cooling shade, absorption of stormwater and animal habitat. Landscaping can also visually screen undesirable views, such as parking lots and blank walls. Finally, it also adds aesthetic value and market value to properties because landscaping simply makes any place more attractive.

DESIGN PRINCIPLES FOR TULLAHOMA



NORTH JACKSON STREET

Existing Conditions

Jackson Street is Tullahoma's primary spine through the community and it offers a first and last impression for visitors. The importance of it has not been lost on the City, as it prepared a streetscape plan for the corridor in 2019. However, that plan deals only with some aesthetic and traffic safety issues, as opposed to a more fundamental transportation of the corridor that would also address the adjacent development.

It is recommended that the City attempt to improve this corridor in a more all-encompassing way. This plan proposes that the core segment between Wilson to the north and Carroll to the south be treated in a more urban form, while the other segments to the north and south might be a better form of suburbia, including more landscaping and access control.

Current Challenges

Among the many challenges posed by Jackson Street's current design are the following:

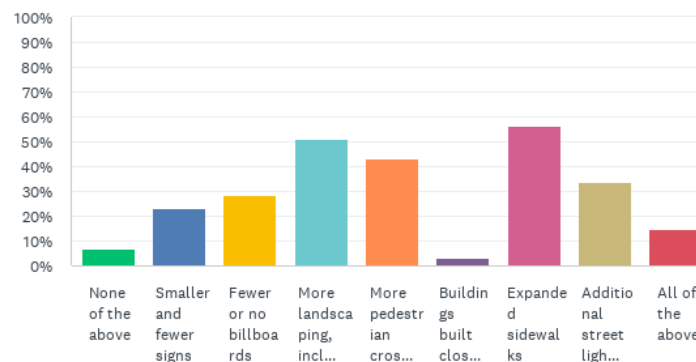
- Gaps in the sidewalk system
- Lack of street trees
- Large barren front parking lots
- Difficult street crossings
- Large signs/billboards
- Excessive driveways (number ~~&~~ width)
- Limited cross-access between properties



Public Opinions

As reflected in the public survey question below, the primary objectives of citizens for this corridor include the following (in order of priority): expanded sidewalks, more landscaping, more pedestrian crossings, additional street lighting, and fewer or no billboards.

Q8 Jackson Street / Hwy. 41A is a key thoroughfare for Tullahoma. If this thoroughfare and adjacent lands were to be physically improved, what types of specific improvements would you like to see? (please select all that apply)



NORTH JACKSON STREET (CONTINUED)

Proposed Improvements

Within the ROW

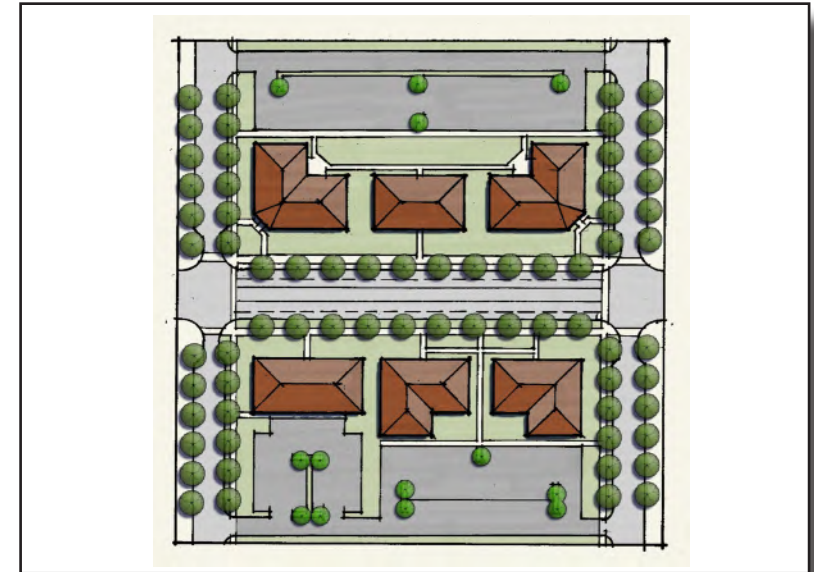
The portion of Jackson Street within the public right-of-way (ROW) was addressed in the City's 2019 streetscape plan. Recommended improvements include the following:

- *Continuous sidewalks and pathways:* Developers should provide them as their properties are developed, but the City may need to fill the gaps where redevelopment is unlikely in the near future.
- *Street trees:* They should be shade trees well-suited for highway ROWs, and coordination with TDOT will be necessary. As with sidewalks, developers should provide them when they develop their property and the City may need to fill the voids where they exist.
- *Enhanced street crossings:* This approach will require pavement treatment and/or coloring, signage to draw the attention of drivers, and pedestrian-controlled lights.
- *Fewer and narrower driveways:* Driveways should only be as wide as are needed for safe ingress and egress by vehicles. This approach minimizes stormwater run-off, decreases development and maintenance costs, is more attractive, and increases the safety for both pedestrians and drivers.

Beyond the ROW

- *Buildings closer to the street:* Not only will this approach give the corridor a more human scale, but it will result in less front parking, if any (depending on the location).
- *Shallower front parking lots with more side and rear parking:* As reflected above at right, there should be no parking between the building and street within the Urban Segment of the corridor.
- *Landscaping in parking lots:* Landscaping includes shade trees along the perimeter of lots, evergreen landscaping to screen particular views, and shrubs to help screen parking, where needed.
- *New sign standards:* New standards should result in fewer signs, smaller signs, and no new billboards. In fact, the amortization of billboards should be considered to eventually eliminate existing ones.
- *Cross-access between sites:* Functioning like alleys, cross-access should be required as part of any development approvals so that drivers can access adjacent properties without having to reenter the flow of traffic on Jackson Street.

Urban Segment



Suburban Segment



NEW HOUSING

The overall topic of housing for Tullahoma is addressed on [pages 97-99](#) of this plan, in addition to the *Appendix C. Housing Market Analysis*. This section of the Community Design section focuses on the design aspects of new housing.

Downtown Housing

According to both this project's housing market analysis and public input, there is a need for a much broader range of housing types than currently exist in Tullahoma. It is recommended that much of this new housing occur Downtown to provide market support to businesses and to provide Downtown with a more "lived in" atmosphere that, in turn, attracts others.

Locations

Developing most or all of a block is more efficient and financially feasible than scattered site development. Also, the demolition of historic buildings should be avoided, particularly in light of the substantial alterations that have occurred to many existing historic buildings.

Design Features

- *Buildings that address the street*, including the primary entrance fronting it
- *Parking in the rear* that is screened from adjacent streets
- *Can feature ground floor commercial* on a shopping street
- *Facade massing for a human scale* by using facade off-sets, features and material changes
- *Sidewalks and street trees* that blend the building with the urban streetscape

Housing Outside of Downtown

Locations

See [pages 48-56](#) in the Place Types section for both the Suburban and Urban Place Types to see appropriate locations for new housing outside of the Downtown.

Design Features

- *Variety of housing types*, including single-family detached, attached and **multi**-family
- *Highly-connected street network*, meaning few or no cul de sacs
- *Peripheral street connections*, including ROW access to adjacent undeveloped property
- *Strong walkability*, including destinations to walk to (parks, commercial uses, etc.)
- *Formal and informal spaces* ranging from plazas, formal parks, and informal green space

ALTERNATIVES: NEW DEVELOPMENT ON GRUNDY



All Housing Scenario:

This development scenario includes a 3-story multi-family building fronting Grundy Street with nine self-parked townhouses featuring spectacular views to the proposed new Rock Creek Park below to the north and west.



Mixed-Use Scenario:

This development scenario includes a 2-story multi-family building fronting Grundy Street with five self-parked townhouses featuring spectacular views to the proposed new Rock Creek Park. Utilizing a shared parking scenario and a reduction in density, there is also an opportunity to create a small restaurant on the west end of the main building with outdoor dining overlooking the park.

New Housing (CONTINUED)

RENDERING: NEW MIXED-USE DEVELOPMENT OVERLOOKING ROCK CREEK PARK



"In most American cities, you can sense almost instantly and instinctively whether it is living or dying by its downtown."

The Tennessean (2005)

"After decades of marginally effective single-solution approaches... downtown is now viewed as a multifaceted organism of economic, physical and social elements that must be addressed in a holistic manner. In short, planning, development, and management must be integrated into a seamless process."

Doug Loesch - Director of the National Trust Main Street Center (2009)

"Vibrant, attractive, user friendly downtowns don't just happen. They are the product of vision, dedicated leadership, effective partnerships and.... good planning. The result is a road map that can help communities get the kind of downtown that everyone needs and wants - and deserves."

Richard Moe - Former President of the National Trust for Historic Preservation (2009)

OVERVIEW

This is the only section of this Comprehensive Plan that focuses on one particular place. The reason is that, based upon this project's community engagement process and economic analysis, the Downtown area is extremely important to Tullahoma. The rich history, physical form, character, and rich mix of land uses make it unique. It is noteworthy that some of the recommendations in this plan section are repeated from other plan sections, such as issues tied to economic development and historic zoning, which reflects the complexities of any downtown that require a multi-disciplinary perspective for planning purposes.

Main Street Four Point Approach

The National Trust for Historic Preservation's Main Street America program has been in the downtown revitalization business since the 1970s. Grounded in historic preservation, hundreds of local Main Street programs across the country have had great success with revitalization efforts. All Main Street programs follow the same "four point approach" to revitalization, which includes:

- *Organization* - board, committees, staffing, volunteers, etc.
- *Design* - buildings, streetscapes, public spaces, parking, etc.
- *Economic Vitality* - business development, incentives, etc.
- *Promotion* - marketing, special events, social media, etc.

State Main Street programs serve as a bridge between the national level and local level programs. In Tennessee, the state program is operated by the Tennessee Department of Economic & Community Development (TDECD). Tullahoma is one of the state's 46 communities that have gone through Main Street program training, but it currently lacks an active Main Street program. Regardless, because the four points are an effective framework for downtown planning, this plan section is organized accordingly.

Why Downtown Tullahoma is Important

There are many reasons why Downtown Tullahoma is so important to the overall community, including:

Downtown is where much of Tullahoma's history occurred.
While significant history happened throughout the area that constitutes today's Tullahoma, much of it occurred in Downtown Tullahoma.

Downtown defines Tullahoma's sense of place.

In light of the generic franchise architecture found in most suburban commercial corridors referred to as "strip commercial development," including segments of Jackson Street, Downtown Tullahoma offers a rare sense of place that conveys Tullahoma's unique character and identity.

Downtown is the institutional and cultural center of town.
Downtown is the location of civic parades, City Hall, the US Post Office, the historic train depot, and various other institutional offices and facilities. It is clearly the civic heart and soul of Tullahoma.

Downtown has the "Smartest Growth" in Tullahoma.
"Smart Growth" is a nation-wide community planning philosophy that encourages environmental, economic, fiscal and social sustainability. It recognizes that downtown area growth translates to less peripheral growth encroaching on outlying rural and natural areas, leverages existing urban infrastructure, and accommodates a mixed-use walkable environment that minimizes automobile trips.

Downtown is your postcard location.
Rarely would a Tullahoma resident entertain out-of-town guests without taking them to Downtown Tullahoma.

Downtown is owned by everyone.
While most areas of Tullahoma outside of the Downtown are only the focus of people living or working in those areas, there is a shared sense of ownership for Downtown.

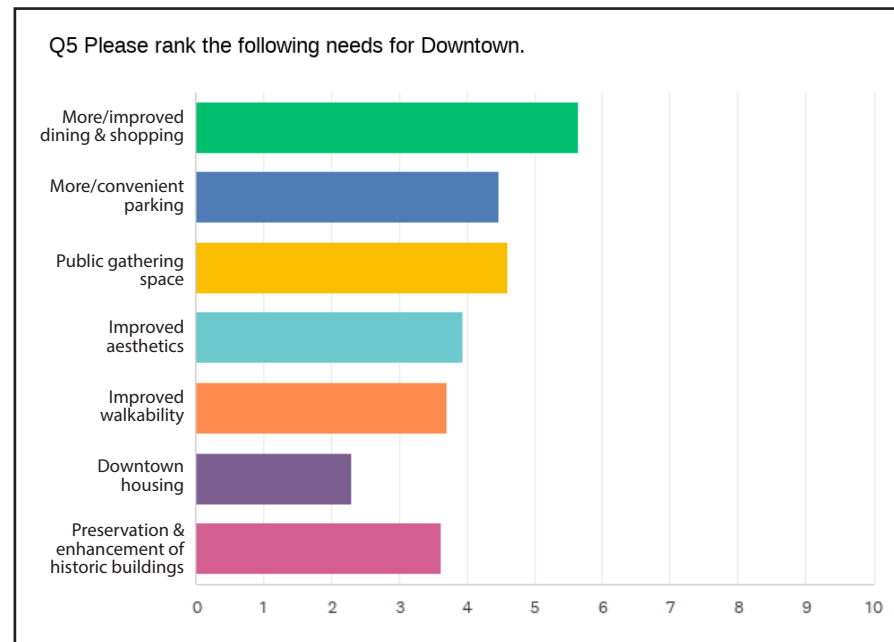
EXISTING CONDITIONS ^{and} OPINIONS

Physical ^{and} Economic Challenges

Relative to most communities roughly the same size and age, Downtown Tullahoma has a general lack of surviving architectural fabric because so many buildings have been lost or altered over time. Unlike many historic downtowns, Tullahoma's does not have local historic district designation to provide protections to buildings and to ensure compatible new infill development. There are also substantial building vacancies, and Downtown lacks a central gathering place, as is found in most downtowns. Fortunately, there is a core group of restaurants, shops and similar businesses that continue to attract Downtown visitors.

Public Opinions

Among the needs for Downtown, housing typically gets the lowest priority in public opinion surveys such as the one conducted in Tullahoma for this plan. The reason is not that housing is an unimportant facet of revitalization. Instead, the people taking the survey already have housing that they are content with, so it is a low priority for them personally.



ORGANIZATION

Establish a Downtown Revitalization Entity

In 2018, Tullahoma went through the required preliminary steps toward adopting a Main Street program, including securing a Mentor Assessment by TDECD and preparation of a Main Street application. While a Main Street program is one option, it is important to recognize that many successful downtown programs are not affiliated with Main Street. Regardless of whether it is independent or not, *it is strongly recommended that the City follow through with establishing a downtown revitalization program, as follows:*

Funding

A downtown program will need roughly \$125,000 to \$150,000 annually to hire a full-time Director, rent office space, and fund other various expenses. Most programs get their primary funding from their municipal government, and that approach is most likely for Tullahoma. It is critical that the City commit to at least three years to attract good candidates for the job, but with the intent of funding long after that initial time frame. Supplemental funding should also be sought from private sector contributions and sponsorships.

Organizational Structure

Consider the following recommendations for the program's organizational structure:

- *Organize the program as a 501c3 non-profit entity* led by a Board of Directors who are Downtown stakeholders. While funding from, and coordination with, the City will still be very important, the downtown program should have a separate identity, including separate office space.
- *Pursue the employment of a full-time Director* who is highly-qualified in downtown revitalization, including substantial past success.
- *Establish a set of working committees* based upon the key issues being faced by Downtown Tullahoma. The committees should consist of both Board members and others in the community who are willing to lend a hand.

Annual Work Plan

Prepare and adopt an annual Work Plan as a guide and benchmark from year to year. Model Work Plans can be gathered from other programs and then adapted for Tullahoma.

DESIGN

Within a Main Street program context, “design” refers to just about any topic related to physical improvements. It is recognized that some ideas of this plan could fall under multiple “four point” categories, but those having a primarily physical planning aspect will be addressed in this plan section.

Buildings

As noted previously in this plan, buildings are one of the most fundamental components of any downtown, including Downtown Tullahoma. **Pages 79-80** of Natural ^{and} Cultural Resources section recommends the following ideas and details are included:

- *Explore historic zoning* via a local historic district that can provide protections to historic buildings and shape the form and character of new buildings.
- *Prepare design guidelines* regardless of whether local historic districts are designated as a resource for property owners that might also be tied to incentives.

Streetscapes

There is a long history of communities that have focused most of their downtown revitalization efforts on redeveloping streetscapes, but with limited long-term benefits. The core area of Downtown Tullahoma (Lincoln and Atlantic Streets) has streetscapes that have been redeveloped relatively recently, as well as recent intersection improvements with pedestrian bulbs and paved crosswalks. These newer streetscapes are well-designed and combine primarily scored concrete with brick accenting, human-scaled streetlights, and street trees. It is recommended that any future streetscape expansions follow this same basic design for cohesion, and the top priority should be Jackson Street. However, new streetscape should be used sparingly and strategically as a way to stimulate adjacent private sector development when opportunities arise.



Parking

At present, despite what many Downtown citizens might feel, there are very few challenges to finding convenient and free parking in Downtown Tullahoma. However, as the Downtown begins to revitalize, demand for parking will increase, so strategies should be mapped out now. Below are recommendations to consider.

On-Street Parking

On-street parking should always be intended for Downtown shoppers and diners, and those who work or live Downtown should park in less convenient parking lots.

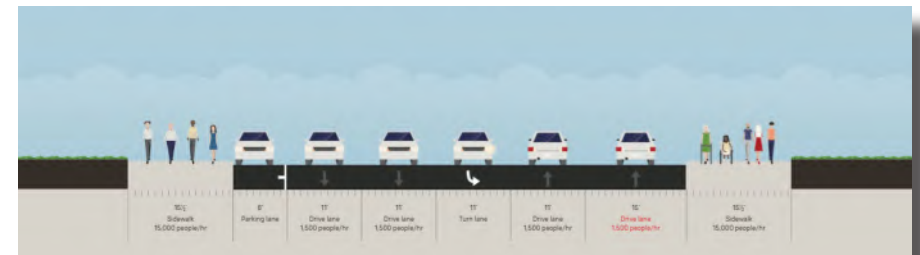
Regulate On-Street Parking

On-street parking should be signed for no more than 3-hour parking. Parking meters are not necessary, but the City must enforce parking to generate the desired turnover.

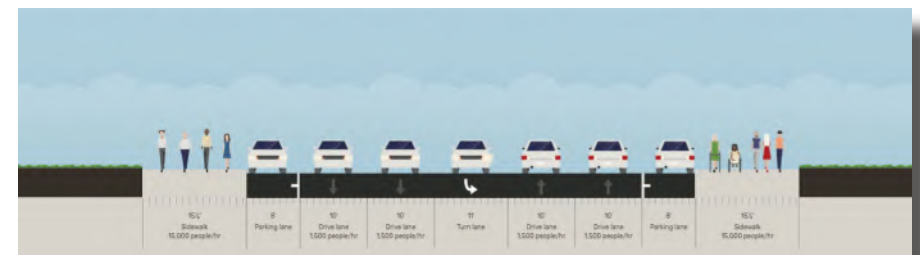
Create More On-Street Parking

Jackson Street is just one example of where new on-street parking might be created. While TDOT approval would be required, the cross-sections below illustrate how driving lanes might be narrowed slightly to free up an 8 ft. width to add a parallel parking lane.

Existing Jackson Street: 4 driving lanes, 1 turn lane, 1 parking lane



Proposed Jackson Street: 4 driving lanes, 1 turn lane, 2 parking lanes



DESIGN (CONTINUED)

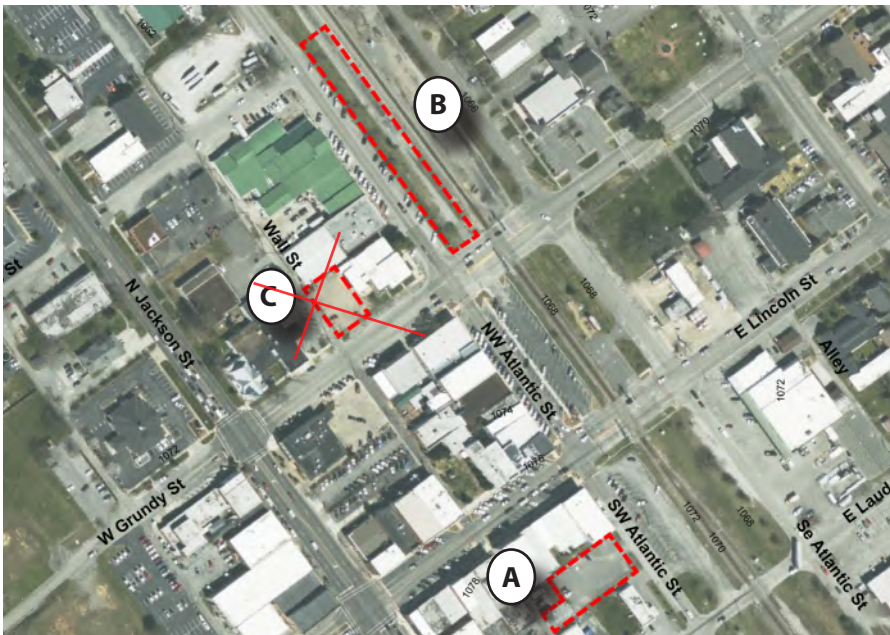
Off-Street Parking

Off-street parking facilities that should be pursued for Downtown Tullahoma are listed here and mapped below (letters in the list are tied to the map below):

A. *Enhanced City lot on Atlantic Street*: Located on the west side of Atlantic Street between Lincoln and Lauderdale Streets, this already-paved lot only needs some landscaping (optional), lighting, paint-striping to delineate spaces, signage and promotion.

B. *Parking Along Rail Line*: Extending the existing parking areas between Atlantic Street and the rail line between Moore and Grundy, this lot would begin just north of Grundy. Extending parking to the south to Warren Street is another option if demand warrants it.

~~C. *Explore Transforming Vacant Lot into Parking*: Located on the northeast corner of Lincoln and Wall Streets, this undeveloped site could be developed as a parking lot with access off of the alley-like Wall Street. However, since this privately-owned space has been used in recent years as an outdoor open space, there may be a lack of support for this idea.~~



New Public Space

It is difficult to think of any highly successful downtown that does not have a central gathering space that is used for both passive purposes and special events. However, no such space currently exists in Downtown Tullahoma. Thus, one is recommended, as follows:

Purpose

A public space for Downtown Tullahoma could serve the following purposes:

- A space for passive use by individuals (strolling, reading, picnicking, etc.)
- A public gathering place for special events (including a stage for performances)
- A location for public restrooms that can benefit Downtown on an ongoing basis
- A means for leveraging economic spin-off benefits to nearby businesses
- A site for a new Downtown Farmers Market (see more on this issue on the next page)

Location

While there may be other alternative sites, it is proposed at this point that the new public space occur at the southeast corner of Jackson and Grundy Streets. This site is privately

Model Public Spaces: Wilkesboro, North Carolina

Although the design would differ some for Tullahoma's proposed space, Wilkesboro's park has many potential parallels. It was developed following a 2011 downtown planning project, and it includes a stage area for performances, open space for seating during events, and the main part of the property can be used for passive uses and even parking during non-event times. The park has also been key to the revitalization of Downtown Wilkesboro. Another public space worth mentioning is the Gallatin, Tennessee Downtown multi-use pavilion. An outgrowth of their 2004 downtown plan, this facility is used for both performances and a regular farmers market, which is why half of the pavilion's funding was from a USDA grant.



DESIGN (CONTINUED)

owned and features Traders Bank and parking. The bank building, which would be demolished, is not historic and, in fact, it is incompatible with Downtown from a design perspective. While it is acknowledged that parking is important for Downtown, the previous section outlines ways to create even more parking, in addition to recommendations for managing on-street parking. Obviously, this concept is contingent upon the cooperation of the affected property owners.

Design

Design features for this roughly one-acre site might include the following features:

- A combination of paved and lawn surfaces, and peripheral shade trees
- A stage, concessions area, and public restrooms in the western corner of the site
- Movable seating (rather than less flexible fixed seating)
- Farmers market tents located along the west side of Wall Street (alley)

More on the Farmers Market

While this plan proposes a new Downtown Farmers Market as part of the new public space, it must be recognized that there are currently two existing markets in town (neither of which leverages economic spin-off because of their locations):

- Church parking lot at Wilson ^{and} Cedar: it operates every Wednesday morning and has a relatively long history
- South Jackson Civic Center: it operates on Monday afternoons and has existed for roughly two years

As indicated on the previous page, there may be potential funding for the market component of the proposed new public space from the US Department of Agriculture (USDA), as other communities have done. The farmers market might be operated by either the City's Parks & Recreation Department, or the proposed new Main Street program, or perhaps a partnership between the two. The non-profit Farmers Market Coalition is a wonderful resource for starting a new program: <https://farmersmarketcoalition.org/>.



Proposed New Downtown Public Space: Short-Term Scenario

This scenario retains London's parking area, but provides food trucks for special events.



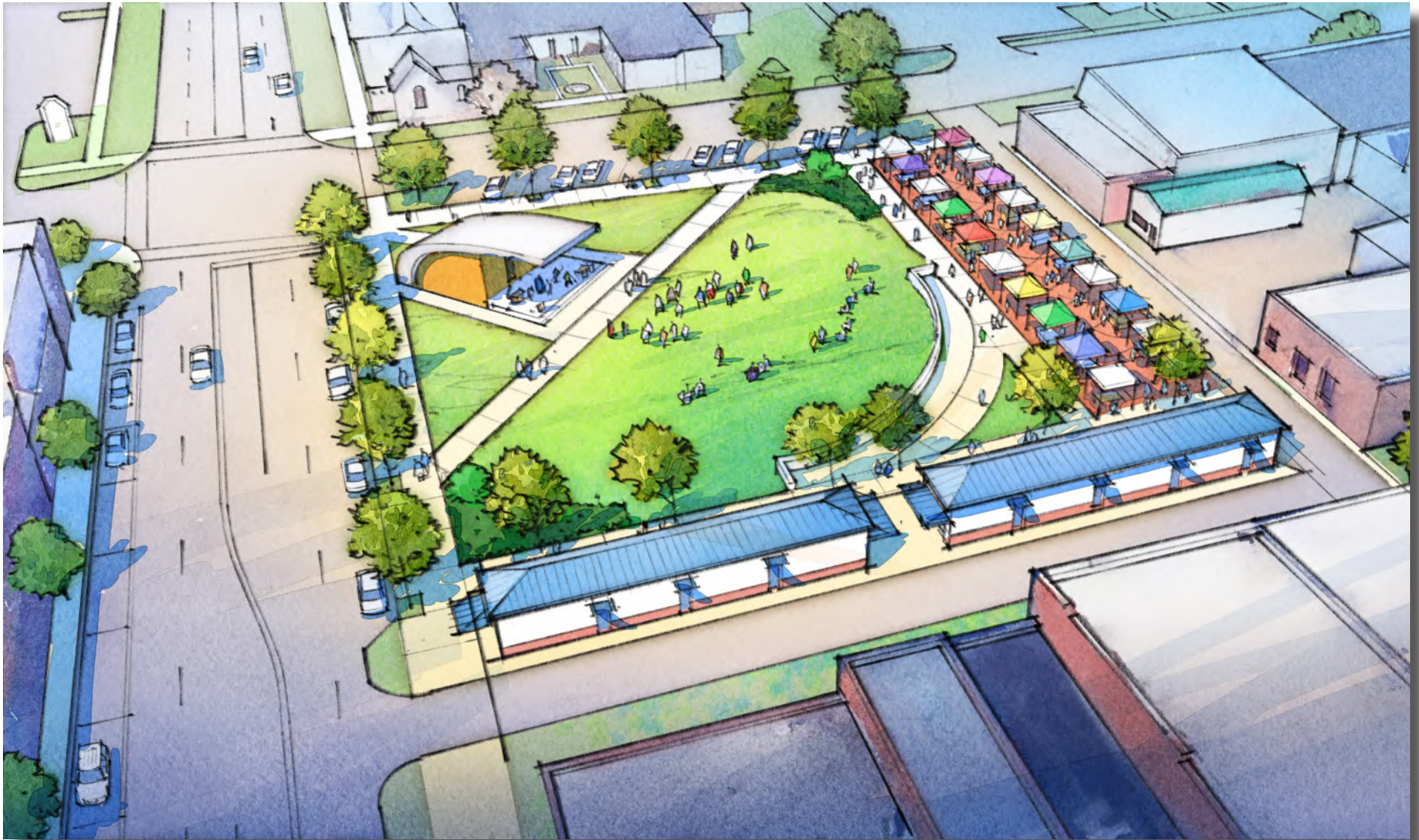
Proposed New Downtown Public Space: Long-Term Scenario

This scenario proposes two shallow one-story retail building in place of London's parking.

DOWNTOWN

Proposed New Downtown Public Space: Long-Term Scenario

This scenario proposes two shallow one-story retail building in place of London's parking.



ECONOMIC VITALITY

This section addresses land uses, business development and financial tools.

Land Uses

As reflected in the previous pages, a farmers market is proposed for Downtown Tullahoma. In addition to that idea and the more basic uses already existing Downtown, such as restaurants and retail shops, the following uses should be pursued:

Housing

More housing in and near Downtown will support retail and dining businesses, provide Tullahoma with more diverse needed housing options, and will help in recruiting new businesses to the Downtown. An increased number of residents will also give the Downtown area a more “lived in” atmosphere to attract visitors. For more information on this concept, see [pages 97-98](#) in this plan’s section on Housing, as well as the *Appendix C. Housing Market Analysis*.

Meeting Venue

Appendix D of this plan entails an Events Venue Market Analysis, as there is presently a lack of meeting venue options within the city limits. That report has determined the viability of a venue that should be located either Downtown or at a lake side location that leverages the natural environment. Either way, below are some of its key characteristics:

- Number of events per year: 120-150
- Capacity of the venue: 500+ people
- Building size: minimum of 6,000 to 8,000 square feet of indoor space
- Indoor space design: flexible and divisible

Given the importance of Downtown revitalization to Tullahoma, it is recommended that a Downtown be prioritized as the location if at all possible.

Lodging

At present, the only lodging within the Downtown area is the Grand Lux Inn. Although this inn is well-located and has a lot of charm, it features only six rooms and two efficiency apartments (for longer stays). The city’s hotels are in suburban locations in the Jackson Street corridor. This plan does not include a hotel market analysis to gauge the market

potential for any new lodging in Tullahoma. However, since the lack of an associated hotel has been pointed to as the reason that many meeting venues in Middle Tennessee have failed, lodging may be important to the feasibility of a new meeting venue for Tullahoma.

Brewery and/or Distillery

As with lodging, this plan does not include an analysis of the feasibility of a brewery or distillery in Tullahoma. The city already has one brewery - Ole Shed, but it is not located in the Downtown area. The closest distillery is George Dickel at Cascade Hollow, and it is a major operation and destination. With that understanding, many downtowns have found that small-scale breweries (micro breweries) and distilleries can go far towards revitalization. Perhaps the existing brewery could relocate to Downtown, new operations might be started, and/or a Downtown tasting room might open as another way to further animate Downtown.

Business Development

Once a revitalization program can be established for Downtown Tullahoma, a key focus should be the retention, expansion and recruitment of existing and new businesses, including restaurants, live music and shops. Although many downtown entities focus their efforts on business recruitment, the retention and expansion of existing businesses is equally important, if not more important, to the extent that such existing businesses are consistent with the optimal tenant mix for Downtown. To achieve successful business development, it is recommended that the following steps occur in the following sequencing:



Anderson, South Carolina’s, downtown group has made a strong connection between business recruitment and property owners.

ECONOMIC VITALITY (CONTINUED)

1. *Conduct a Retail Market Analysis* (including dining) to determine the optimal tenant mix so that business development can be extremely targeted toward the types of businesses that can be viable in Downtown Tullahoma.
2. *Maintain a constant dialogue with existing business owners* to be able to assist struggling businesses and to be sure that expanding businesses remain in the Downtown area.
3. *Create marketing materials* promoting Downtown's optimal tenant mix based upon the recommended Retail Market Analysis in a manner that convincingly conveys the pent-up market demand as a powerful marketing tool for recruitment.
4. *Conduct and maintain a building inventory* to understand the availability of space so that new tenants being recruited can be matched to potential spaces, including their owners/representatives.
5. *Establish a Business Development Team* to meet with owners of businesses being recruited. It should include, at a minimum, the Downtown program Director and a current Downtown business owner.
6. *Target successful "mom and pop" businesses* located in other communities in the region and encourage them to open another such business in Downtown Tullahoma.

Financial Tools

Incentives for individual properties were previously addressed on [page 80](#) of this plan. Other potential financial tools include the following:

- *Explore the designation of a tax increment financing (TIF) district* for Downtown Tullahoma. This concept is based on future increased tax revenues generated by a development being used to retire a loan for funding infrastructure and similar improvements tied to the development. See more on this topic on [page 103](#) regarding economic development.
- *Consider a business improvement district (BID)* if there is substantial property owner interest. While the timing is likely not yet ripe to gain sufficient support for a BID, a BID features an increase in property taxes by which the additional revenues go towards various services to benefit the downtown beyond those normally provided by the City, such as increased clean-up and maintenance in ROWs, enhanced policing, marketing, and similar services. Also, the BID funds can support a revitalization entity such as the proposed Main Street program.

PROMOTION

Promotion is the fourth point of the Main Street "Four Point" approach. Big pushes in promotion are often embarked upon following an initial focus on the other three points so that a certain level of "product improvement" can first occur. Therefore, the proposed Downtown program may want to stall attracting numerous first-time visitors who might otherwise be underwhelmed by their experience, thereby missing an opportunity for a more positive first impression that might have been achieved if more implementation had occurred beforehand. Below are recommended key promotional strategies.

Digital Media

Once established, it is important that the proposed Downtown program create an attractive and user-friendly website. The program should also utilize social media effectively given the strong returns for such a relatively affordable marketing tool.

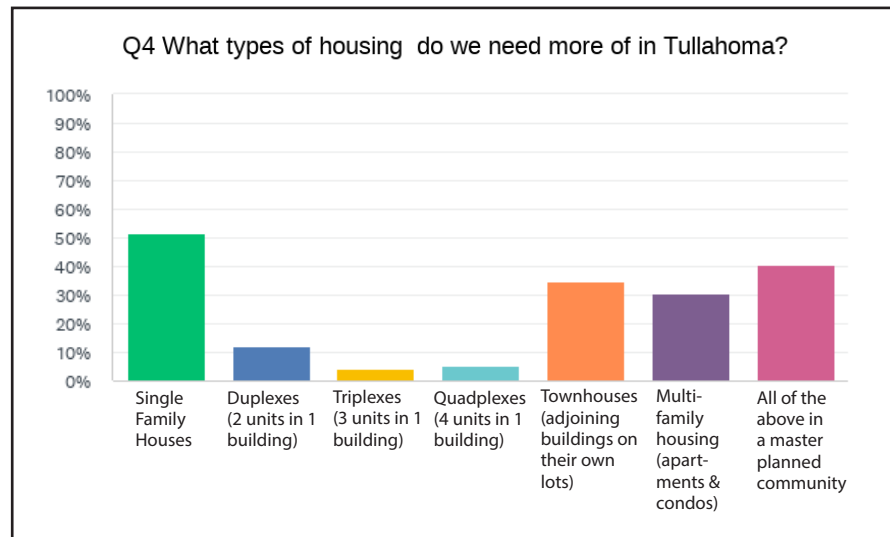
Events

It is important that all events that currently occur in Downtown continue in Downtown. However, once a Downtown program is established, working closely with the City's Parks and Recreation Department, public events Downtown should be expanded. The development of a new public space, as recommended on [pages 92-94](#), will greatly expand the opportunities for more public events. Once developed, there should be a series of regular events (monthly and even weekly). Regardless of the specific events and their frequency, the mantra should be "quality over quantity."

Other Strategies

- *Conduct a "Shop Local" campaign* to be spearhead by the Tullahoma Area Chamber of Commerce and the Downtown program once established.
- *Encourage food trucks to operate in Downtown* as a supplement the existing mix of restaurants. The City should adopt regulations and designate appropriate locations in underutilized parking lots. One obvious location might be the parking lots between Atlantic and the rail line. There are numerous model food truck ordinances, and one to consider as a starting point is Franklin, Tennessee's.

Appendix C of this plan contains the full version of the Housing Market Analysis, while [pages 24-25](#) in the plan's Existing Conditions section provides a summary of those key findings. This section presents several housing development concepts and opportunities for Tullahoma. Recommendations are also made for housing rehabilitation, and for marketing and branding to attract investment. Finally, strategies are presented to capture funding for specific redevelopment projects and to overcome obstacles to investment. These strategies are meant to help inform other elements of this Comprehensive Plan for Tullahoma.



Although opinions cannot take the place of the realities of market demand and genuine needs, it is always instructive to understand what citizens believe regarding issues such as housing. As the graph above illustrates from the public opinion survey conducted as part of this Comprehensive Plan, single-family housing was identified as the most needed housing type. The next most popular housing types in order of preference were:

- All of the above in a master planned community
- Townhouses
- Multi-family housing
- Duplexes, quadplexes and triplexes

DEVELOPMENT CONCEPTS

Several development concepts are offered as input to the planning process and to help guide redevelopment efforts in the city. Even where the market supports them, development concepts such as these will typically require some type of public intervention or leveraging because private developers may not otherwise enter the market with these products.

Downtown Mixed-Use

There are opportunities to strengthen Downtown Tullahoma through the development of apartments or mixed-use projects that enliven Downtown's streets and bring a "built-in" market for Downtown businesses. Given the resistance of some residential neighborhoods to multi-family development, Downtown provides an opportunity to integrate apartments into a commercial business hub away from single-family housing.

New Housing

New mixed-use development with ground-floor retail and upper-floor rental apartments or condominiums could provide competitive new space for retail businesses, while also providing a new residential product to help diversify the housing offerings in Tullahoma. The housing market analysis indicated that there is potential for both condominiums and rental apartments, but it will be more challenging to obtain financing for condominiums in this market. *A project with 20 to 40 rental units and ground-floor retail may be an appropriate scale as a start-up project for Downtown Tullahoma.* Development of an infill project could be leveraged, in part, with investment in a Downtown public event space, restaurants, and other amenities that enhance the Downtown lifestyle and walkability.

Building Rehabilitation

In addition to new construction, there are some limited opportunities for upper-floor renovations and rehabilitation of existing buildings in the Downtown area. The Veranda House Apartments has already proven at least a basic market exists for rental apartments Downtown in an historic setting. These apartments rent from \$525 to \$675, so they are priced at the lower end of the market. High insurance and rehabilitation costs, coupled with low rents, have prohibited owners from investing in these spaces. However, there may be opportunities for consolidation of spaces to help reduce the cost and increase market exposure on a marginal basis.

DEVELOPMENT CONCEPTS (CONTINUED)

The City might consider facilitating partnerships between building owners and providing them with incentives to combine upper-floor spaces that may otherwise be too small or inefficient to rehabilitate on their own. Some potential incentives are described later in this section. Reconnaissance seems to indicate that there may only be a handful of these spaces with potential for rehab, but even having a few “loft” apartments in historic buildings helps to diversify the offering for housing Downtown and in Tullahoma overall.

Neighborhood Infill

There are a number of vacant and under-utilized lots in the city that could, if consolidated, support neighborhood infill development of townhouses and single-family detached and “zero lot-line” housing. Some lots could support development of some of the *50 to 200+ for-sale workforce housing units for which there is forecasted demand* in Tullahoma. Again, some of this housing might be clustered near commercial corridors and transportation routes. Ideally, if a public transportation system is expanded to Tullahoma, then workforce housing should be located along bus routes. But there are also opportunities for infill market-rate housing to meet some of the *demand for up to 300 market-rate units over the next five years*. Some opportunities for market-rate and workforce housing might be enabled through public land banking and site consolidation, as discussed later in this section.

Apartment Communities

Tullahoma has a need and a market for development of townhouse and garden-style apartment communities that offer modern amenities, contemporary design, and standards comparable to those being built in Murfreesboro and other competitive cities. Again, *the market supports development of up to about 190 market-rate rental units*, and there is also *potential for 75 to 140 workforce rental units*. High-quality design standards would be essential for promoting multi-family development in communities that are otherwise resistant to that form of housing. Locating such development in or near commercial corridors not only helps avoid direct conflict with single-family neighborhoods, but also provides amenity value to renters who then have direct access to goods and services. Ideally, specific locations for apartments can be identified by the City to help secure development opportunities against any future opposition. The Place Types section of this plan identifies locations for such housing in Suburban Corridor and Suburban Neighborhood areas.

Traditional Neighborhoods

The increasing incomes and affluence of residents entering the Tullahoma market indicates that demand for higher-end product will continue to grow. The market analysis suggests that there would be *demand for 150 to 190 for-sale housing units priced in the \$300,000 range*. However, there will continue to be unmet demand for more moderate-priced housing in the \$200,000 range, along with both market-rate and workforce rental housing. There are opportunities to accommodate a mix of housing styles, tenure, and pricing in traditional neighborhood developments (TNDs) that also help to capture regional market base.

TNDs can allow for some measure of cross-subsidy of lower-priced product, although those opportunities have become severely constrained during the COVID Pandemic due to the rising cost of materials and labor. Still, Tullahoma’s relatively low land costs can help create opportunities that may not exist elsewhere in Middle Tennessee’s cities.



Traditional Neighborhood Developments feature a range of housing types, including the types of housing currently needed in Tullahoma. They come with strong design standards that maintain their value over time.

In terms of location, the Place Types section of this plan includes a “Traditional Neighborhood - New” category with TND-type development in mind. There are several undeveloped areas that have been designated with this Place Type. For example, one is on the eastern edge of town just north of East Lincoln Street, and it abuts Bobo Creek on its northeast corner. Another is in the southwest corner of town just south of West Lincoln Street and south and southwest of the North Fork of Blue Creek. Yet another is located along the southern edge of Tullahoma a bit west of South Jackson Street and immediately east of Rock Creek.

and MARKETING & DEVELOPER RECRUITMENT

There is a need to package and promote sites for housing development within the city limits of Tullahoma to potential housing developers. Tullahoma has lost some of its local housing building industry, but the regional development community has not yet “found” the community or discovered its potential for housing development. Area builders continue to find sites for low-cost development outside of the City limits, foregoing the City’s regulatory authority, while holding down costs. But there are regional and national developers active in the Murfreesboro market that are more familiar with the need for sidewalks, street trees, and other higher development standards. These types of developers should be targeted for recruitment to Tullahoma, rather than maintaining lower standards to meet the nominal cost requirements of low-cost builders. Elsewhere in this plan are recommendations to enhance Tullahoma’s development standards (see [pages 68, 76 and 84](#)). Also, a marketing package should be created with information on incentives and other important information to use as a tool to recruit developers.

Some of these regional developers have discovered opportunities in Shelbyville and other smaller Middle Tennessee markets. Targeting outreach to these residential builders (both rental and for-sale) should be a part of the City’s economic and business development efforts. This Comprehensive Plan, which would be shared with potential developers, will help in that regard by establishing locations and parameters for housing development and by indicating the depth of market potential.



There are many regional and national developers active in Middle Tennessee communities such as Murfreesboro and Shelbyville, but they do not seem to have discovered the strong market potential in Tullahoma. It will be important for the City to actively recruit such developers, who are also not discouraged by high-quality design standards such as sidewalks and street trees.

and FUNDING & LEVERAGING

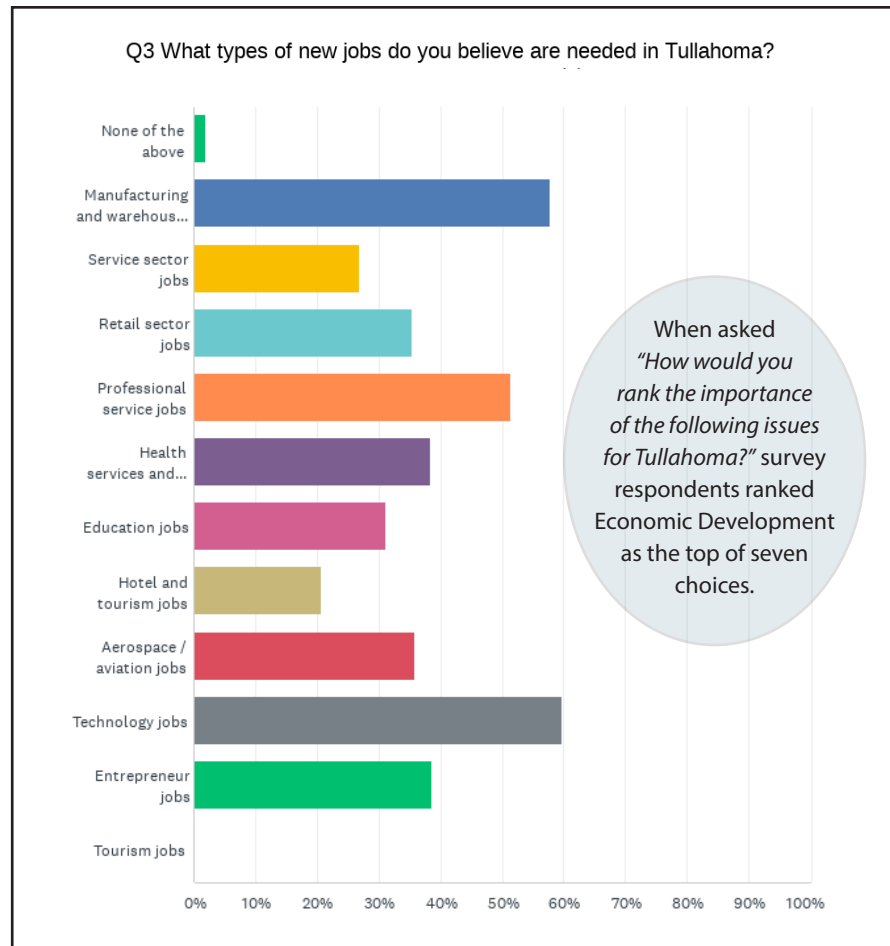
Coupled with an effort to discourage sprawl and growth outside of the City’s regulatory authority, Tullahoma can offer incentives to develop in town. As noted above, there is the opportunity to consolidate vacant and under-utilized sites in the city and to package them with public amenities like parks, high-quality schools (which is an incentive in itself), and recreation facilities. The City can accomplish this task in several different ways, such as through a “Land Bank” approach that allows the City to acquire land strategically through purchase, condemnation through codes enforcement, default, tax liens, gifting, consolidation with City land or of City agency facilities, and/or partnerships with property owners for equity investment. The City can then promote sites for master planning and development.

Whether or not the City plays a pro-active role in accumulating land, it can help facilitate the creation of sites for development or redevelopment such as by encouraging private property owners to form equity partnerships to consolidate vacant or underutilized parcels. The City can leverage development through technical assistance such as:

- Funding the creation of master plans, engineering studies, or other due diligence
- Working on behalf of property owners to recruit developers (such as through an RFP process)
- Improving the streetscape (e.g., underground utilities in the downtown area) and upgrading infrastructure (e.g., adding sidewalks)
- Fast-tracking the regulatory process and reducing fees for designated sites, and
- Creating or packaging infrastructure and grant incentives for targeted sites.

Such incentives might also include a payment in-lieu of taxes (PILOT) program or, for more complex mixed-use projects Downtown, a tax increment financing (TIF) program. The City should also use these programs to help target and promote the inclusion of workforce housing units in new development.

Appendix B of this plan contains the full version of the Economic Baseline Assessment, while pages 21-23 in the plan's Existing Conditions section provides a summary of those key findings. Tullahoma. As noted in the previous section, public opinions do not replace objective economic analysis based on statistics. However, the graph below reflects how people ranked, in their opinions, the types of jobs needed in Tullahoma. Technology jobs had the greatest support, which is a good fit for AEDC and the UT Space Institute, while the next highest rankings were for manufacturing/warehousing and professional service jobs.



BACKGROUND

This plan section is adapted from Appendix E of this plan - the Economic Development Strategy. It features only the key highlights from that report, so please refer to the full report for details.

VISION STATEMENT

A Unified Message of Tullahoma in 2040:

Tullahoma is a vibrant economic hub and a city on the move; a tourism destination with natural assets and a culture of innovation in aviation testing technologies and medical services; a proud, attractive and walkable community with great schools, diverse housing, and a small town lifestyle.

Economic Development Objectives

The following objectives were forged through a series of focus group meetings with various representatives of Tullahoma's economic development community.

1. Become a medical services hub and a center for technology innovation, with a focus on testing and product and process development.
2. Identify and prioritize sites and buildings for rehabilitation, redevelopment and new development (e.g., older warehouses, airport business park).
3. Enable development of diverse housing to accommodate the needs of the workforce, professional recruitment, and lifestyle changes.
4. Become a tourism destination, building existing assets and through traffic.
5. Develop a unified voice in marketing our strengths.
6. Enhance our aesthetic qualities through streetscape improvements, especially in our commercial corridors and gateways.
7. Diversify our fiscal base in order to enable more opportunities for funding and staffing projects and programs that are needed in the city.

and HEALTH SERVICES & BIOMEDICAL INDUSTRIES HUB

Tullahoma is recognized as a medical hub for Coffee, Franklin, and surrounding counties. The ~~Vanderbilt Tullahoma-Hartom Hospital~~ serves as an important anchor for medical and health care services in southern Middle Tennessee. Health care remains one of the nation's fastest growing economic sectors. There is an opportunity to grow this hub and concentrate more health care services in the city as a spur for high-value and high-wage jobs.

and Anchor Uses & Activities

- ~~Vanderbilt Tullahoma-Hartom Hospital~~ **Vanderbilt Tullahoma-Hartom Hospital**
- *LifeFlight* - helicopter service based at Tullahoma Municipal Airport
- *Health care cluster* - providers, services, suppliers, and associated support activities

Educational Resources

- *Motlow State Community College* - offers relevant programs in Bioinformatics, Health Sciences, Nursing, Preclinical Lab, and Pro-OT & PT

and Health Care Services & Related Business Recruitment

- *Identify significant gaps* in the supply of health care services or related businesses that provide an opportunity for business recruitment or development.
- *Potential opportunities include* small medical device and equipment manufacturers, suppliers, or repair services given Tullahoma's strength as a center for aviation and aerodynamic testing technologies.

See page 6 of Appendix E for the full list of recruitment opportunities.

Operating Structure

It is recommended that the City and its economic development partners establish a committee charged with outreach, research, and support for this sector. The committee would inform the broader efforts of the City's economic development and marketing team.



Vanderbilt Tullahoma-Hartom Hospital
**Vanderbilt-Tullahoma
Hartom Hospital**

and AVIATION & AEROSPACE INDUSTRIES AND ASSOCIATED TECHNOLOGY DEVELOPMENT

Tullahoma has long been a center for innovation, with the testing and development of aviation and aerospace technologies. The presence of the Arnold Engineering Development Complex (AEDC) has driven this innovation. While AEDC has had an enormous impact on the local economy, driving demand for local services and supporting local business development, the base has not yet spun-off an active, sustainable cadre of private companies developing and manufacturing commercial products in Tullahoma based on the base's technology innovation and strengths. Yet, there are opportunities to build on the local skills, expertise, and possibly facilities and equipment that are unique to AEDC to spur entrepreneurial development and attract businesses to commercialize emerging technologies. Opportunities and strategies are identified here to leverage local assets, including AEDC, the U.T. Space Institute, and the Tullahoma Municipal Airport for the purposes of economic development.

and Anchor Uses & Activities

- AEDC is the primary existing anchor for this set of strategies
- *Military contractors* with specialized expertise and experience
- *Tullahoma Regional (Municipal) Airport* is situated adjacent to under utilized land that could be further developed for associated activities
- *Redstone Arsenal* in Huntsville and its contractors provide opportunities for further spin-off in aerospace innovation and technology development

Educational Resources

The University of Tennessee Space Institute (UTSI) is another anchor use and educational resource available for leveraging and growing the technology sector in Tullahoma. Research Centers at the institute include:

- BEAMS (Biomedical Engineering and Materials Science)
- CEAR (Computational and Experimental Aerospace Research)
- CLA (Center for Laser Applications)
- HORIZON (High-Speed Original Research and Innovation Zone)
- Mossbauer Lab (experimentation and analysis of spectra)

and AVIATION & AEROSPACE INDUSTRIES AND ASSOCIATED TECHNOLOGY DEVELOPMENT (CONTINUED)

and Entrepreneurial Development & Business Recruitment

There were opportunities identified for both entrepreneurial development and business recruitment relating to the AEDC hub, UTSI educational resources, and innovation activities clustered in Tullahoma. Some of these opportunities relate directly to aviation and aerospace, but also to broad-based testing and product development.

and Arnold Heritage Center & Innovation Park

A proposal has been developed by a group of citizens for the creation of an Arnold Heritage Center and Innovation Park, which would focus on several different objectives, namely:

- A space for accommodating technology-related innovation, entrepreneurship, and business development
- A tourism hub to celebrate Hap Arnold and AEDC heritage including innovation in aviation and aerospace technology
- A recreational facility and park to promote better health and to fulfill a DoD directive to enhance quality of life and recruitment **U.S. Department of Defense**

Although Air Force innovation hubs already exist or are under development, it is assumed that the City will submit this proposal to the US Air Force/AFWERX program for funding consideration.

Technology Park

A longer-term opportunity rests in the concept of a technology park anchored perhaps by the proposed Arnold Heritage Center and potentially by specialized functions or spin-off operations of UTSI and AEDC, as key drivers for innovation activity. The park would be focused on product development, commercialization and manufacturing that would maximize entrepreneurship and job creation. Components of the park might include:

- and
Aviation & Aerospace Technologies
- Medical-Related Technologies
- Aerodynamics Technologies **Information**

A feasibility study should be prepared for this concept to confirm its economic and financial viability. See page 11 of *Appendix E* for details on funding and management.

TOURISM DESTINATION

Economic analysis and stakeholder visioning has indicated a need for the City of Tullahoma and its partners to become more directly engaged in marketing, developing, and promoting the city as a tourism destination.

and Anchor Uses & Activities

Key anchor uses and activities that are described in detail on pages 12-13 of *Appendix E* (Economic Development Strategy) include the following:

- **Whiskey Trail - Distillery** - connecting the Jack Daniel's and George Dickel distilleries, it may pose an opportunity for one or both, or another distillery, to operate a micro-distillery, bar/restaurant, or retail establishment in Downtown Tullahoma, although market analysis would need to confirm the viability.



- **Aviation & Aerospace Heritage** - the Beechcraft Heritage Museum's collections could be augmented through the proposed Arnold Heritage Center and a new City library Downtown area that houses special collections relating to Air Force history, aviation, and aerospace.



- **Recreation Amenities** - existing destinations already include the Short Springs State Natural Area, Lake Normandy, Woods Reservoir, and the Tims Ford State Park, while new ones can include the proposed Rock Creek Park and an expanded greenway system.
- **Live Music and Special Events** - building upon the area's existing events, this plan's proposed development of a Downtown public space, to include a stage for performances, could add further to Tullahoma's draw for live music and events.

TOURISM DESTINATION (CONTINUED)

Business Recruitment ^{and} Development

To promote business development relating to 1) the whiskey trail, 2) aviation, aerospace, and military-related tourism, and 3) recreation-oriented tourism businesses, it is recommended that the findings of past or future market analysis completed for the City be used as a basis for identifying specific business targets and opportunities for business leveraging and commercial development. Market analysis should provide forecasts on tourism-generated market support for specific categories, businesses and brands, as well as the requirements for recruitment and leveraging. Pages 13-14 of *Appendix E* of this plan elaborate on business recruitment and development recommendations for tourism in Tullahoma.

Marketing ^{and} Development Structure

The Tullahoma Area Chamber of Commerce already plays an important role in marketing and promoting tourism to the city, and there is an appointed Tourism Committee for the City. Regardless, there is a need for an entity engaged more on the product development side of tourism, as opposed to marketing alone. The City of Columbia has created a tourism director staff position, who oversees both the development of tourism products, as well as marketing for the city. This position is funded through the City's hotel/motel lodging tax. Tullahoma may not have the resources by itself to create a municipal tourism position, but there may be opportunities to collaborate with other agencies (e.g., AEDC, County/IDB) in funding a broader development authority position dedicated to various development projects, including tourism product development. The development component of this position is oriented to conducting outreach, such as to AEDC, Marshall Space Flight Center, Jack Daniel's, George Dickel, resort lodging developers, Beechcraft Heritage Museum, potential recreation retailers, and others to facilitate discussions on potential products and development opportunities. This position would also work within the various City agencies to coordinate on planning and zoning, permitting, master planning, proposals, grant funding, and development relating to the various potential tourism projects (such as the proposed Rock Creek Park, the Arnold Heritage Center, and others).

BUILDINGS ^{and} SITES

Stakeholders have noted a dispersed presence of under-utilized buildings and sites throughout the city, but especially near Downtown and along key corridors radiating from the city. Several strategies for enhancing the utilization of these sites and buildings are summarized below and detailed on pages 15-16 of *Appendix E*.

Recommendations Summary

- *Inventory ^{and} Assessment:* An inventory of buildings and sites should assess their conditions for reuse, rehabilitation, or redevelopment (a retail market analysis will often provide such an inventory of each commercial building and use).
- *Marketing Program:* Once an inventory occurs and a list of priority sites has been established, the City should work with owners and brokers to ensure that they are actively marketed, and offer to facilitate or fast-track permits, approvals, and utilities.
- *Building Rehabilitation ^{and} Redevelopment District Incentives:* The City should designate redevelopment district(s), such as the Downtown and South Jackson area, and offer a package of incentives (depending on the specific area) such as tax increment financing (TIF), public improvements, building façade grants, a co-op purchasing program, and loan guarantees.
- *Streetscape Program:* As already addressed in the Mobility and Downtown sections of this plan, streetscaping can help leverage the revitalization of buildings and sites by encouraging more private investment, and might be accomplished in well-planned phases that allow time for the City to generate sufficient advance funding.
- *Workforce Housing:* Targeting vacant or under-utilized sites and buildings, the City might acquire properties in high-priority redevelopment districts or corridors and establish a request for proposals (RFP) process to recruit workforce housing developers.



ECONOMIC DEVELOPMENT STRUCTURE

Stakeholders noted a disconnect between the myriad agencies, committees, and organizations conducting various elements of economic development in Tullahoma and surrounding areas. There is a need for collaboration, but also for consistent marketing and for designating responsibilities and resources to the appropriate parties to carry out specific strategies as outlined herein. The recommendations summarized below aim to refine the existing economic development processes in which the City and its partners are currently engaged, and the details can be found on pages 17-19 of *Appendix E* of this plan.

Tullahoma Area Economic Development Corporation (TAEDC)

The existing TAEDC should fulfill much of the role of directing economic development efforts for the City. However, there appears to be a lack of strategic planning, oversight, delegated powers, and tracking to ensure that economic development efforts are accomplishing goals and objectives set forth for the city. To shore up this position, enhance its mandate, and strengthen outcomes, the following strategies are recommended.

- *Develop an Economic Development Strategic Plan:* The elements should build upon this plan and include goals and objectives, projects list and status report, accomplishments, recruitment targets, marketing and branding plan, funding and incentives, sites and buildings, and a list of metrics and benchmarks to be used to measure success.
- *Target Implementation Actions:* An Implementation Action Plan should be developed as part of the recommended Strategic Plan and should include specific timetables, designated responsibilities, funding requirements, and sources of funding where applicable.
- *Restructure the Committee System:* The existing and recommended new City committees relating to Economic Development should serve in an advisory role to the TAEDC, rather than solely as independent committees acting on economic development matters. A Marketing Committee should also be formed with representatives of economic development entities to coordinate a consistent and “unified” messaging and branding strategy.
- *Adopt Metrics and Benchmarking:* In addition to standard measures (business starts and failures, job change, relocations, unemployment statistics, etc.), metrics should also examine fiscal returns from projects, expansion and diversification of the tax base, building reuse and revitalization, new development, housing diversification, and labor force re-

cruitment. The City should also identify comparable communities and benchmark them against key factors.

- *Apply Adherence and Council Oversight:* There is a need for adherence to the recommended Strategic Plan and for Council oversight of the TAEDC to ensure that it is meeting objectives. Staff performance needs to be measured, in part, based on adherence to the Strategic Plan and accomplishments, as well as metrics, benchmarks, and such measures as: the number of business outreaches; retention and recruitment meetings; incentives communicated and utilized; and marketing plans developed.

Tullahoma Area Chamber of Commerce

It is recommended that the Chamber have responsibility for tourism marketing, but should work closely with the City (and its prospective development entity) in developing new tourism products. The Chamber also has responsibility for business networking and retention, and working with existing businesses to ensure that they get the resources they need.

~~Tullahoma Development Director/Authority~~ Expand TAEDC to Include Project Development

~~A need has been identified for a development entity, such as a Tullahoma Development Authority (TDA), that focuses on project development and business recruitment in the city. Many cities have a local development authority, often focused on their downtown or sometimes working in tandem with the industrial development board. The City Manager currently serves to some extent as the de facto development director, but there is a need for a position dedicated to development. There are three models for consideration:~~

- ~~Tullahoma Development Authority (TDA) created as a new agency with some financing capacity to support the efforts of the TAEDC, Chamber, Airport Authority, and other entities on tourism and economic development efforts.~~
- ~~TAEDC Director Position in the existing agency, expanded to comprise skills in both economic development (business recruitment, etc) and project development.~~
- ~~TAEDC transitions to have a broader combined ED and development function, including financing and policy capacity. This agency might have added staff capacity as well to handle development projects, as well as business recruitment.~~

A need has been identified for a development entity, such as a Tullahoma Development Authority (TDA), that focuses on project development and business recruitment in the city. Many cities have a local development authority, often focused on their downtown or sometimes working in tandem with the industrial development board. The Community Development department currently serves to some extent as the de facto development director, but there is a need for a position dedicated to development. Models for consideration: • Expanded responsibilities to comprise skills in both economic development (business recruitment, etc) and project development by partnering with Community Development. • TAEDC transitions to have a broader combined ED and development function, including financing and policy capacity. This agency might have added staff capacity as well to handle development projects, as well as business recruitment.

OVERVIEW

What is Resiliency?

According to the Merriam-Webster dictionary, resiliency is:

“The ability of something to return to its original size and shape after being compressed or deformed. An ability to recover from or adjust easily to adversity or change.”

How Does Resiliency Relate to Planning?

Within the context of city planning, resiliency is the ability for communities to rebound from natural disasters such as flooding, mud slides, and wild fires. While this topic was rarely address in the comprehensive plans of past decades, it is now becoming a standard plan component. The reason for this change is that science has identified climate change as the culprit for dramatic weather conditions that were less extreme in previous decades. For example, the 100 year floodplains that once flooded an average of once every century can now flood multiple times in a ten-year span. As stated in the American Planning Association’s 2020 publication “Climate Change Policy Guide”:

“Climate change is the most consequential worldwide environmental event that human civilization has had to confront.”

Pages 7-10 of this plan provide background information on the following existing natural conditions in Tullahoma: topography, water resources, soils and forested areas. Also, page 35 addresses climate change specifically. The purpose of this plan section is to address measures that the City might take to improve its resiliency in the face of climate change.

Sample Comments from the Public Opinion Survey

“It is sad to see the destruction of natural areas, bulldozed for ill-conceived “development,” and with all the problems that follow.”

“Environmental concerns (eliminate plastic bags and bottles, styrofoam). Identify chemical free-mow free zones for butterfly habitat restoration, enforcement of littering fines when observed, etc.”

“Quit destroying woodland areas to build housing.”

“One change [we need] is a new recycle building.”

POLICIES & ACTIONS

This section identifies some policies and actions for resiliency that already exist, while others are recommended. The focus here is on preventative measures, as opposed to dealing with the aftermath of events that might challenge Tullahoma’s resiliency. The resiliency issues most relevant to Tullahoma and addressed below include:

- Floodplains and water bodies
- Tree canopy
- Energy
- Recycling

As indicated below, many of the proposed policies and actions have already been recommended elsewhere in this plan, which is not surprising given this plan’s alignment with “Smart Growth” planning philosophies that place a strong emphasis on environmentally friendliness. Where already addressed by this plan in more detail, page references will be provided.

and
Floodplains & Water Bodies

This topic may be the single most important one for Tullahoma related to resiliency, as flooding can be a tremendous threat to lives and property. The primary streams and their related floodways and floodplains consist of Rock Creek, Blue Creek, Bobo Creek and their various forks, as mapped on page 8 of this plan. Existing and proposed policies and actions include the following:

and
Existing Policies & Actions

- Stream buffers per State regulations (page 77)
- City drainage maintenance program of pipe cleaning, debris removal, and inlet cleaning (page 75)
- City’s pursuit of a grant from the Tennessee Department of Agriculture (TDA) for Rock Creek cleanup (page 78)

and
Proposed Policies & Actions

- Discourage the disturbance of floodplains, which might include incentives such as transfer of development rights (pages 77-78)
- Encourage or mandate green infrastructure for stormwater (page 76)

and **POLICIES & ACTIONS** (CONTINUED)

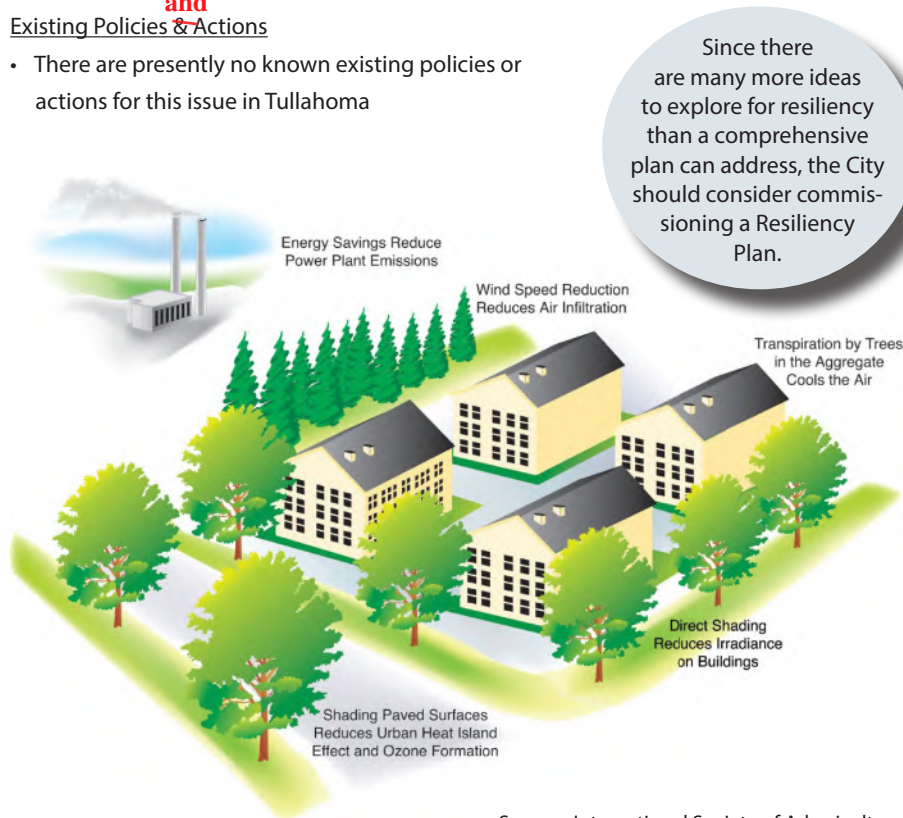
- Initiate a program to increase stormwater detention/retention (page 75)
- Revise drainage and detention design standards (page 75)
- Revise stormwater ordinances for development to better address impacts (page 75)

Tree Canopy

As explained previously in detail on page 10 of this plan, trees provide many benefits to the natural and built environments. The diagram below makes this same point, although it overlooks the stormwater absorption qualities of trees. Tree canopy policies and actions are summarized below:

and Existing Policies & Actions

- There are presently no known existing policies or actions for this issue in Tullahoma



Source: International Society of Arboriculture

and Proposed Policies & Actions

- Require street trees in the subdivision regulations (page 78)
- Adopt a tree preservation ordinance (page 78)

Energy

Energy is an important resiliency issue for two key reasons. First, some forms of energy result in air pollution, such as those that burn fossil fuels. Secondly, energy sources that are not renewable (unlike hydro, solar and wind-based sources) can eventually be used up. Below are existing and proposed policies and actions related to energy sources in Tullahoma.

and Existing Policies & Actions

- The City has constructed a greenway system and bike facilities that can minimize the use of motorized vehicles that burn fossil fuels

and Proposed Policies & Actions

- Expand the greenway and bike lanes throughout the community (pages 69-71)
- Require electric vehicle charging stations at civic buildings, private sector developments of a minimal magnitude, hotels, and encourage them elsewhere (page 72)
- Solar panels might be required for public sector buildings and incentivized for private sector buildings

Recycling

Recycling reduces energy costs for production and keeps materials out of landfills.

and Existing Policies & Actions

- Tullahoma already has a home pick-up recycling program, although glass is not included (it is noteworthy that many communities do not pick up glass due to the costs)

and Proposed Policies & Actions

- The City is already exploring options for glass recycling, and efforts should continue
* Encourage the purchasing of materials with a higher recycled content.

It is also noteworthy that other aspects of this plan contribute to resiliency for Tullahoma. For example, many of the proposed Place Types are for walkable mixed-use areas that are environmentally friendly. Similarly, some of the proposed Road/Street Types accommodate pedestrian and bicycling mobility, which are also good for the environment.

OVERVIEW

An effective plan implementation strategy helps the community move from vision to reality. The intent of this plan section is for the plan to be successfully implemented through the actions of the City, including elected and appointed bodies (boards and commissions) and staff. Other entities and individuals will also be needed to implement the plan, including the local real estate and business community. The City's required actions may include ordinance amendments, budget approvals, and similar activities and tools. Capital projects that are part of this plan should be included in the City's capital improvements program and budgeted accordingly. Regardless of the specific responsibilities of the City government, it will take the entire Tullahoma community, public sector, private sector and non-profits, working together to achieve the full vision expressed in this plan.

How to Apply the Plan

Plan Implementation Committee

Just as the City appointed a diverse group of citizens to spearhead this comprehensive planning project, a similar committee should be appointed to implement the plan. The plan might include some members of the Project Steering Committee, along with other citizens not previously directly involved with the project. This new committee should:

- Meet periodically to review and pursue ongoing implementation
- Be staffed by City planning staff to provide the needed support and implementation
- Report to the Board of Mayor and Aldermen at least annually regarding progress

Flexibility

The Comprehensive Plan should be viewed as a living document so that its implementation can be adjusted for changing circumstances. However, regardless of revisions, the City should adhere to the plan's Planning Principles, as listed on [pages 39-40](#) of this plan.

Plan Updates

As new circumstances, opportunities and challenges for Tullahoma arise over time, the City should periodically update the plan. It should be updated at least every five years based on new circumstances and the City's implementation achievements for this plan. In fact, in states that mandate comprehensive planning (not including Tennessee), five year updates are typically required, as well as zoning that is consistent with the community's plan.

POLICY REVISIONS

There are multiple ways to implement this plan, but key examples include the following policy revisions (to the extent that the City can build consensus on these ideas).

Zoning Revisions

Per the recommended Place Types section of this plan, revisions will include:

- Revise the zoning map consistent with this plan's Place Types map ([page 43](#))
- Revise zoning standards consistent with this plan's Place Types section ([pages 44-59](#))

Development Standards Revisions

- Adopt this plan's proposed Road/Street Type standards ([pages 62-65, 67](#))
- Adopt stormwater and green infrastructure regulations and/or incentives ([pages 75-76](#))
- Discourage the disturbance of floodplains ([page 77](#))
- Adopt a tree preservation ordinance and require street trees for subdivisions ([page 78](#))

Other Policy Changes

- Explore designating local historic districts and adopt design guidelines ([pages 79-80](#))
- Adopt incentives for historic building rehabilitations and pursue CLG status ([page 80](#))
- Regulate Downtown's on-street parking with time limits, but without meters ([page 91](#))
- Pursue financial incentives for property improvements, business development and other economic development efforts of the private sector ([pages 96, 99, 103](#))
- Require electric vehicle charging stations at civic buildings, private sector developments of a minimal magnitude, hotels, and encourage them elsewhere ([page 72, 106](#))
- Explore requiring solar panels for public sector buildings and incentivizing them for private sector buildings ([page 106](#))

Urban Growth Boundaries

[Page 31](#) of this plan features a map and information regarding the adopted Urban Growth Boundary (UGB). The following recommendations are offered for Tullahoma's UGB:

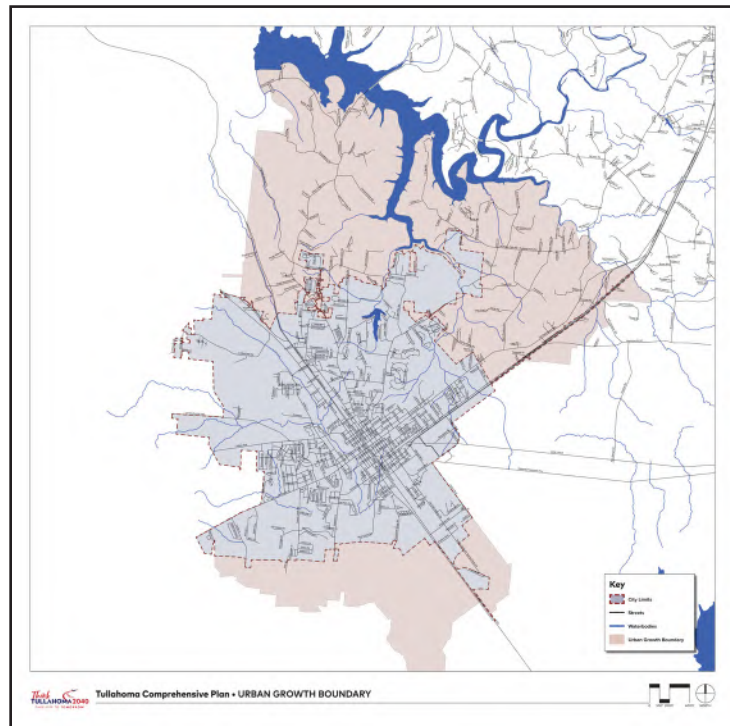
Pursue Zoning Authority in UGB Areas

As explained previously on [page 31](#), the City has been granted by Coffee and Franklin Counties subdivision regulation authority and Planning Commission review authority for both of its designated UGBs, but not zoning regulation authority. While this planning proj-

ect has not identified any reasons to change the UGB map, *it is recommended that the City revisit both Counties to pursue the authority to employ zoning regulations within both growth areas.*

Designate Areas in the UGB with the Rural Place Type

As described earlier on [page 46](#) in the Place Types section, this plan designates the Rural Place Type for all portions of the UGB areas. ~~The objective is to avoid sprawl, which can have numerous negative impacts (see the sidebar at right regarding the fiscal implications of sprawl). The one exception to this approach relates to the Traditional Neighborhood - New (TN-N) Place Type.~~ It is proposed that, when a TN-N located in a peripheral area of the City straddles the UGB, the TN-N designation could extend into the UGB area so long as it is physically contiguous with the portion of the TN-N already within the city limits. Also, the development should meet the standards of the City regarding street design, utilities and other infrastructure issues.



Tullahoma's Urban Growth Boundary (UGB) is limited to areas to the north in Coffee County and areas to the south in Franklin County. The City should continue to pursue zoning authority for both of these areas.

Economic Costs of Sprawl

The following information was assembled by the Greenbelt Alliance, a non-profit that advocates for Smart Growth, and adapted for this sidebar:

- *Providing and maintaining water, sewer, roads, and other infrastructure to far-flung neighborhoods is very costly for local governments.* A 2015 study by the Global Commission on the Economy and Climate found that policies limiting density in large cities cost America over \$1 trillion, and can increase per-capita land consumption by up to 80% and car use by up to 60%. The estimated yearly cost to provide roads in the most sprawled communities averaged \$804.74 per household, compared to \$19.87 in the highest density communities.
- *Sprawl results in higher transportation and energy costs, and reduced access to jobs, services, and amenities in more centralized locations.* These additional costs can outweigh the typically-reduced housing prices that residents may pay to live in outlying areas. Residents in sprawl neighborhoods can expect to drive about three times as many miles as urban drivers, who rely more heavily on walking, biking, and public transit. A 2012 San Francisco State University study found a 10% increase in dense development and smart growth amenities - including increases in housing density, jobs per capita and public transit infrastructure - resulting in a 20% decrease in vehicle miles traveled.
- *Public services are more expensive for low-density sprawl development than for infill development.* For example, a new development on the outskirts of a city requires new police and fire services. Because sprawl development is more distant and less dense, more officers may need to be working at a time to cover the additional area. Regarding fire services, the further a home is from a fire station, the higher its property insurance rates are in order to address a low fire rating. A Charlotte, North Carolina study in 2012 found that neighborhoods with low densities and disconnected streets require four times the number of fire stations at four times the cost compared with more compact and connected neighborhoods. The "Cost of Sprawl" analysis found that a city's annual average household cost for public services is \$1,416 in high-density areas, and up to \$3,462 in sprawling areas (as of 2012).

PRIMARY CAPITAL PROJECTS

Capital projects of the City are another important plan implementation method, including the following.

Mobility Improvements

Policies related to mobility, including road and street design standards, were summarized on the previous page. Actual key initiatives related to mobility include the following:

- Road improvements and connections per this plan's Mobility section (pages 66-68)
- Bike and pedestrian mobility facilities (bike lanes, greenways, sidewalks, etc. (pages 69-71)

Other Improvements

Other improvements that should be initiated by the City include the following:

- Infrastructure improvements for utilities, stormwater drainage, etc. (pages 74-76)
- Parks and recreation improvements (page 82-83)
- Development of a new public space and additional parking Downtown (pages 92-94)



"There is no design so good that it can't be messed up by bad implementation."

- Sravani Saha Nakhro (physician and author)

"Aspirations without implementation is little more than a wish list."

- Professor Salam Al Shereida (occupational health and safety expert)

"Dreaming is good, but implementation is success."

- Paballo Seipei (social media manager)

PLAN IMPLEMENTATION MATRIX

The Implementation Matrix on the following pages lists specific recommendations expressed throughout this plan. It provides a concise statement of each key recommendation, cites the pages of the plan that provide more detail on the recommendation, indicates who will be responsible for implementation, and when the recommendation should be implemented. Below is an explanation of two of those information categories that call for greater elaboration.

Responsible Party

The "responsible party" column in the matrix identifies individuals, groups, or organizations that should implement the subject recommendation. It should not be viewed as exclusive or comprehensive because others who have not been listed may have an interest, skill, or responsibility for assisting with the recommendation. It should also not be interpreted to be mandatory. This part of the plan should remain fluid to be responsive and nimble to take advantage of opportunities and partnerships as they present themselves over the coming years. It should also be noted that the alphanumeric designation of each recommendation does not reflect a sequencing of priorities.

Time-Frames

When considering the time-frame of a particular recommendation, it is important to understand that some actions build on others and cannot occur simultaneously if they are to be effective. Therefore, actions listed as "Years 4-5" are not necessarily less important, but they often just require other actions to occur first.

PLAN IMPLEMENTATION

No.	Recommendation	Page #	Responsible Party	Time-Frame
A. Place Types				
A-1	Adopt a new zoning map to implement this plan's proposed Place Types Map.	43	City	Year 1
A-2	Adopt new development provisions for this plan's proposed Natural Areas.	44-45	City	Year 1
A-3	Adopt new zoning provisions for this plan's proposed Rural Areas.	46-47	City	Year 1
A-4	Adopt new zoning provisions for this plan's proposed Suburban Areas.	48-51	City	Year 1
A-5	Adopt new zoning provisions for this plan's proposed Urban Areas.	52-56	City	Year 1
A-6	Adopt new zoning provisions for this plan's proposed Special Areas.	57-59	City	Year 1
B. Mobility & Corridors				
B-1	Adopt the Road/Street Type standards proposed in this plan.	62-65, 67	City	Year 1
B-2	Implement the proposed road/street improvements and connections through design and construction.	66-67	City, County, TDOT	Years 2-3
B-3	Implement this plan's non-motorized mobility improvements for greenways, bikeways and sidewalks.	69-71	City, County, TDOT	Ongoing
B-4	Redevelop North Jackson Street for a more functional and attractive street and associated development.	73, 85-86	City	Years 4-5
B-5	Manage Downtown's on-street parking to generate turnover to accommodate visitors for shopping, dining, etc.	88	City	Year 1
C. Other Physical Improvements				
C-1	Implement this plan's recommended infrastructure and utility improvements over time as funding allows.	74-76	Relevant utility companies	Ongoing
C-2	Implement this plan's recommended parks and recreation improvements over time as funding allows.	81-83	City	Ongoing
D. Natural /Cultural Resources & Resiliency				
D-1	Adopt regulations to discourage the disturbance of floodplains, including "cut and fill" to elevate buildings.	77-78	City	Year 1
D-2	Revise the subdivision regulations to require street trees for all new subdivisions.	78	City	Year 1
D-3	Adopt a tree ordinance to protect existing significant trees and avoid clear-cutting on development sites.	78	City	Year 1
D-4	Continue to pursue the addition of glass to the City's existing recycling home pick-up program.	102	City	Ongoing
D-5	Adopt requirements for electric vehicle charging stations at civic buildings and require/encourage elsewhere.	72, 102	City	Year 1
D-6	Mandate or encourage "green infrastructure" as part of the City's existing development regulations.	76	City	Year 1
D-7	Explore requiring solar panels for public sector buildings and incentivizing them for private sector buildings	102	City	Year 1
D-8	Explore the designation of local historic districts and adopt design guidelines (regardless of designations).	79-80	City	Year 1

No.	Recommendation	Page #	Responsible Party	Time-Frame
E. Downtown				
E-1	Establish a downtown revitalization program (potentially a Main Street program, but not necessarily).	90	City	Year 1
E-2	Explore the designation of local historic districts and adopt design guidelines (regardless of designations).	79-80	City	Year 1
E-3	Regulate on-street parking and develop new parking areas at locations proposed in this plan.	91-92	City	Year 1
E-4	Develop a new public space with a stage for performances, public restrooms and a farmers market market	92-94	City	Years 2-3
E-5	Pursue new land uses and anchors, including housing, an event menu, and other specified uses.	95	Main Street program	Year 1
E-6	Conduct business development through market analysis, a recruitment committee, and other means.	95-96	Main Street program	Ongoing
E-7	Explore financial tools for businesses and property owners through a TIF, BID and related tools.	96	City, Main Street program	Years 2-3
E-8	Promote Downtown through digital media, special events and other methods per this plan.	96	Main Street program	Years 2-3
F. Housing & Economic Development				
F-1	Adopt design standards for multi-family housing and traditional neighborhood developments to ensure quality.	98	City	Year 1
F-2	Identify and recruit regional and national housing developers who are active in Middle Tennessee.	99	City	Ongoing
F-3	Support housing developers via land banking, infrastructure, technical assistance and other incentives.	99	City	Ongoing
F-4	Position Tullahoma as a health services and biomedical industries hub.	101	City and econ. develop. partners	Ongoing
F-5	Expand the aviation and aerospace industries and associated technology development in Tullahoma.	101-102	AEDC, UTSI, City/Airport	Ongoing
F-6	Strengthen Tullahoma's role as a tourism destination via the whiskey trail, aviation heritage, recreation and events	102-103	City, Chamber, attraction reps.	Ongoing
F-7	Inventory, incentivize and market under-utilized properties in targeted areas for uses such as workforce housing.	103	City, future Main Street program	Ongoing
F-8	Consolidate and strengthen Tullahoma's economic development structure and operations.	104	TAEDC, City, Chamber, partners	Ongoing

Tullahoma Comprehensive Plan

A photograph of a railroad crossing. In the foreground, there are railroad tracks with gravel ballast. A metal guardrail runs across the middle ground. In the background, there is a long, low building with a sign that says "L&N". To the left of the building, there is a railroad crossing sign that says "RAIL CROSSING" and "CROSS ROAD". To the right of the building, there is a railroad signal. The word "APPENDICES" is overlaid in large, white, bold letters in the center of the image.

APPENDICES

Tullahoma Comprehensive Plan

APPENDICES

A. PUBLIC OPINION SURVEY RESULTS

B. ECONOMIC BASELINE ANALYSIS

C. HOUSING MARKET ANALYSIS

D. EVENT VENUE MARKET ANALYSIS

E. ECONOMIC DEVELOPMENT STRATEGY

Tullahoma Comprehensive Plan

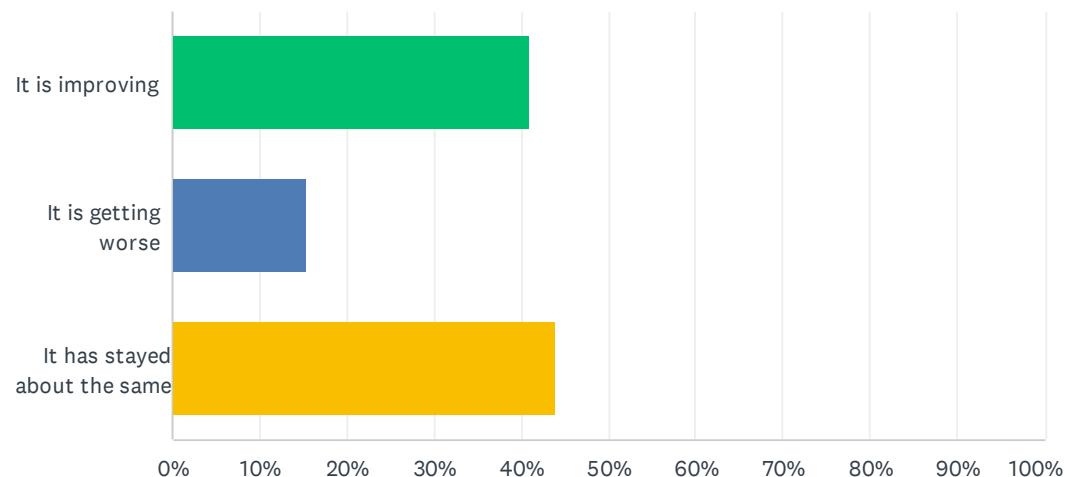
APPENDIX A.

PUBLIC OPINION SURVEY RESULTS

NOTE: THE RESULTS FOLLOWING QUESTIONS #9 AND #10 HAVE NOT BEEN INCLUDED BECAUSE THEY ARE NARRATIVES THAT REQUIRE TOO MANY PAGES, BUT THEY CAN BE OBTAINED THROUGH THE CITY.

Q1 How would you describe the overall quality of life for you as a Tullahoma resident? For example, your housing, job opportunities, education, a vibrant downtown, availability of goods and services, parks, recreation and open space.

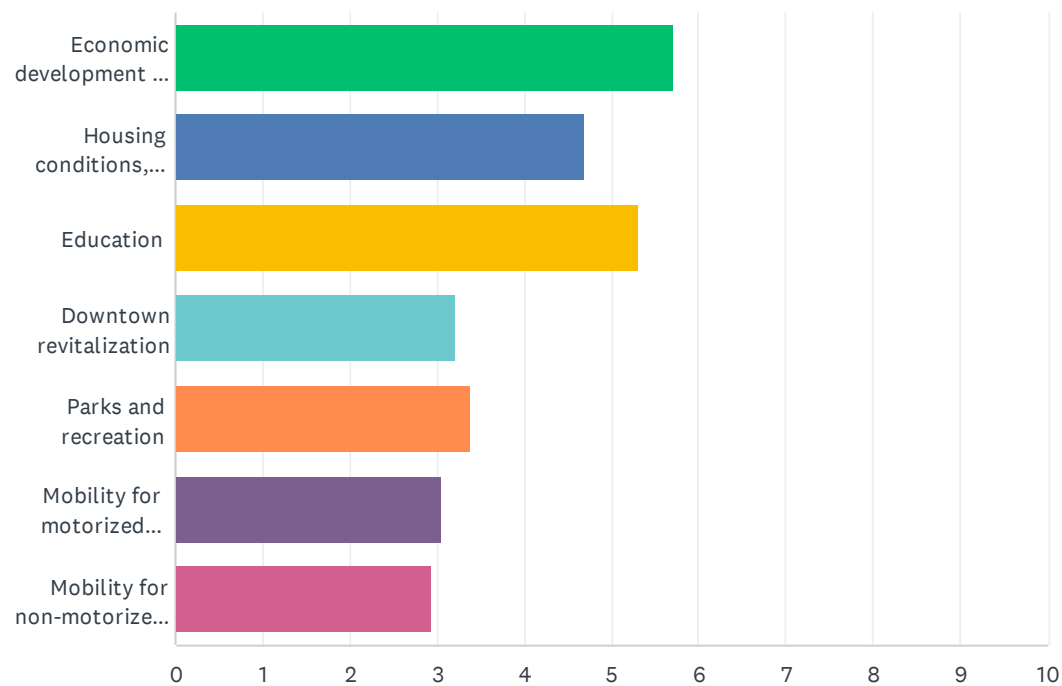
Answered: 1,145 Skipped: 12



ANSWER CHOICES	RESPONSES	
It is improving	40.87%	468
It is getting worse	15.28%	175
It has stayed about the same	43.84%	502
TOTAL		1,145

Q2 How would you rank the importance of the following issues for Tullahoma? (1 is most important and 7 is least important)

Answered: 1,145 Skipped: 12



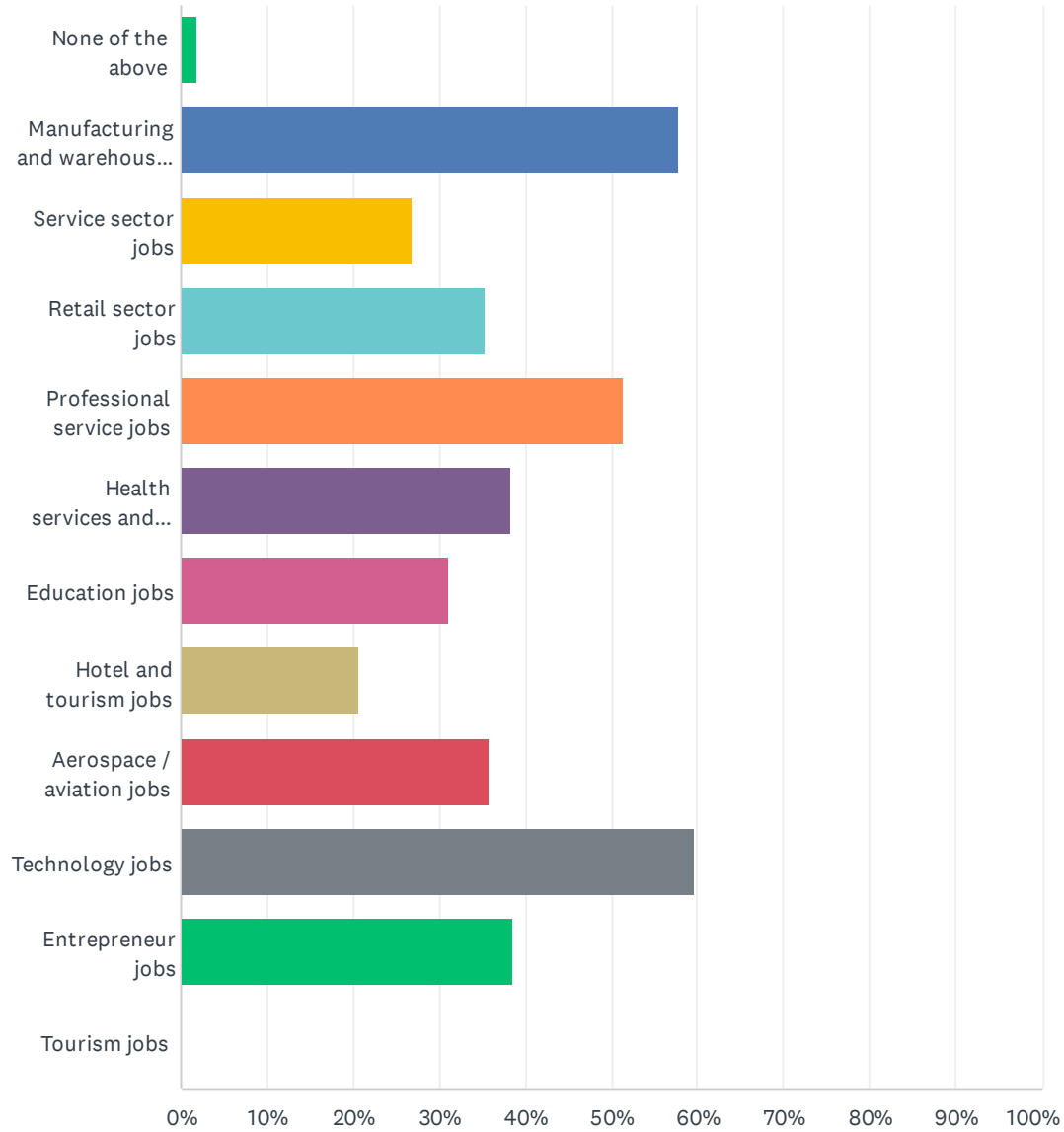
Tulahoma Comprehensive Plan Survey

	1	2	3	4	5	6	7	TOTAL	SCORE
Economic development and job creation	41.75% 453	24.70% 268	14.19% 154	8.48% 92	6.18% 67	2.21% 24	2.49% 27	1,085	5.71
Housing conditions, choices and affordability	14.77% 162	23.70% 260	23.70% 260	13.04% 143	10.12% 111	8.30% 91	6.38% 70	1,097	4.70
Education	27.24% 301	26.24% 290	22.53% 249	9.23% 102	6.24% 69	5.07% 56	3.44% 38	1,105	5.30
Downtown revitalization	5.34% 59	5.97% 66	11.86% 131	19.19% 212	19.00% 210	16.74% 185	21.90% 242	1,105	3.22
Parks and recreation	2.62% 29	6.32% 70	12.00% 133	22.56% 250	28.52% 316	18.59% 206	9.39% 104	1,108	3.39
Mobility for motorized vehicles (less traffic congestion, etc.)	4.65% 52	7.16% 80	8.86% 99	16.10% 180	15.12% 169	25.94% 290	22.18% 248	1,118	3.04
Mobility for non-motorized vehicles (bicyclists, walkers, etc.)	6.80% 77	7.51% 85	7.95% 90	12.10% 137	14.22% 161	20.58% 233	30.83% 349	1,132	2.95

Q3 What types of new jobs do you believe are needed in Tullahoma? (please select all that apply)

Answered: 1,132 Skipped: 25

Tulahoma Comprehensive Plan Survey

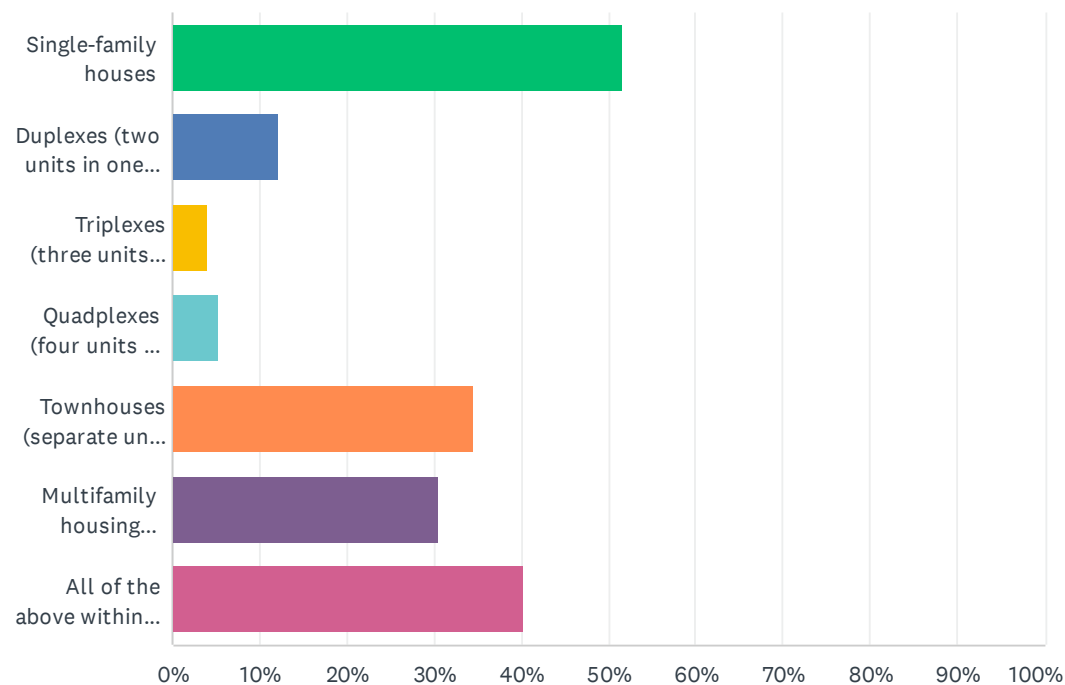


Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
None of the above	1.94%	22
Manufacturing and warehousing jobs	57.86%	655
Service sector jobs	26.77%	303
Retail sector jobs	35.42%	401
Professional service jobs	51.33%	581
Health services and biomedical jobs	38.34%	434
Education jobs	31.18%	353
Hotel and tourism jobs	20.58%	233
Aerospace / aviation jobs	35.87%	406
Technology jobs	59.72%	676
Entrepreneur jobs	38.60%	437
Tourism jobs	0.00%	0
Total Respondents: 1,132		

Q4 What types of housing do we need more of in Tullahoma? (please select all that apply)

Answered: 1,132 Skipped: 25

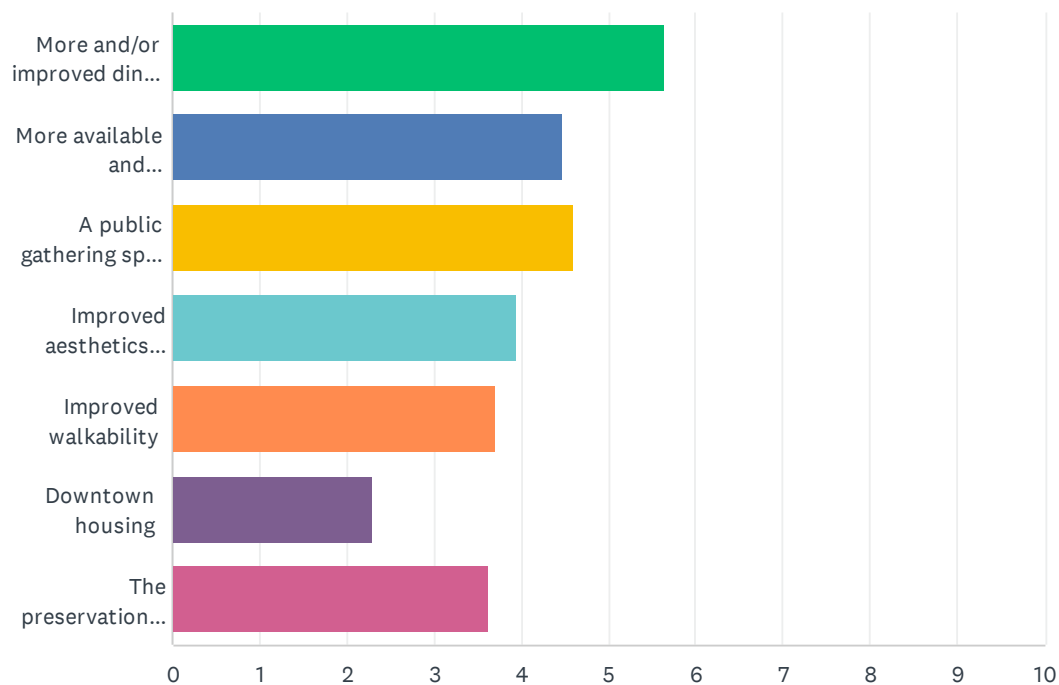


Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
Single-family houses	51.68%	585
Duplexes (two units in one building)	12.19%	138
Triplexes (three units in one building)	4.06%	46
Quadplexes (four units in one building)	5.30%	60
Townhouses (separate units each on its own lot, often multi-story, with shared sidewalls)	34.54%	391
Multifamily housing (apartments and condominiums)	30.48%	345
All of the above within a master planned community	40.28%	456
Total Respondents: 1,132		

Q5 Please rank the following needs for Downtown. (1 is most needed and 7 is least needed)

Answered: 1,143 Skipped: 14

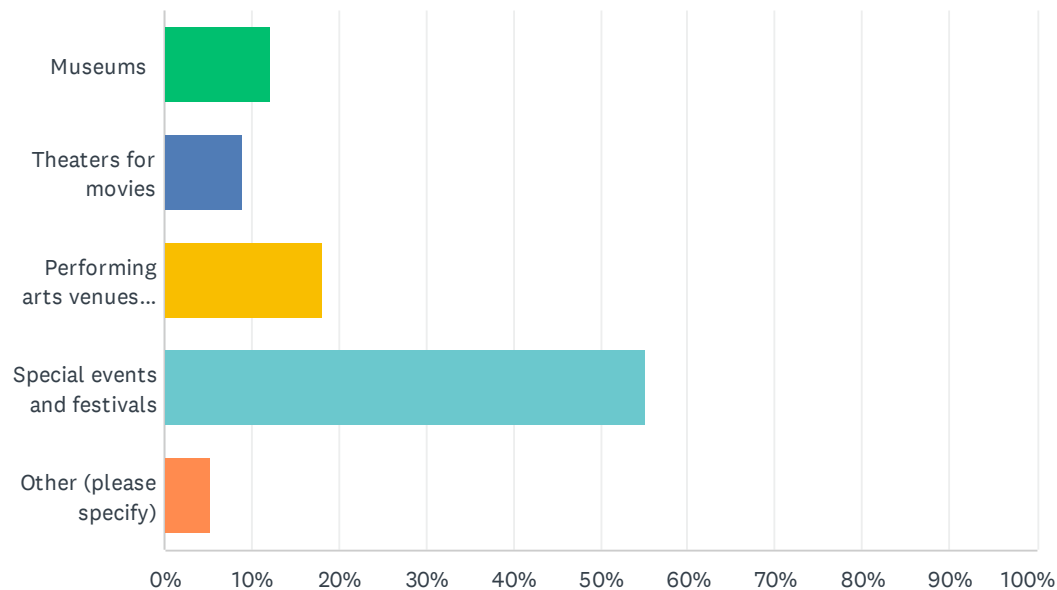


Tulahoma Comprehensive Plan Survey

	1	2	3	4	5	6	7	TOTAL	SCORE
More and/or improved dining and shopping	44.00% 480	20.16% 220	13.29% 145	9.53% 104	6.78% 74	3.67% 40	2.57% 28	1,091	5.64
More available and conveniently-located parking	14.52% 157	23.59% 255	15.63% 169	14.06% 152	12.03% 130	12.67% 137	7.49% 81	1,081	4.47
A public gathering space for events, such as a plaza or park	12.05% 132	20.18% 221	24.75% 271	17.72% 194	13.06% 143	8.77% 96	3.47% 38	1,095	4.60
Improved aesthetics (landscaping, building facades, etc.)	7.32% 81	13.92% 154	16.46% 182	20.07% 222	20.61% 228	14.01% 155	7.59% 84	1,106	3.95
Improved walkability	7.31% 80	9.41% 103	13.79% 151	18.36% 201	23.56% 258	21.64% 237	5.94% 65	1,095	3.70
Downtown housing	3.81% 42	4.53% 50	5.98% 66	6.53% 72	9.97% 110	20.58% 227	48.59% 536	1,103	2.30
The preservation and enhancement of historic buildings	13.87% 156	10.22% 115	11.56% 130	13.24% 149	13.16% 148	16.44% 185	21.51% 242	1,125	3.63

Q6 What cultural attractions would you like to see more of in Tullahoma?

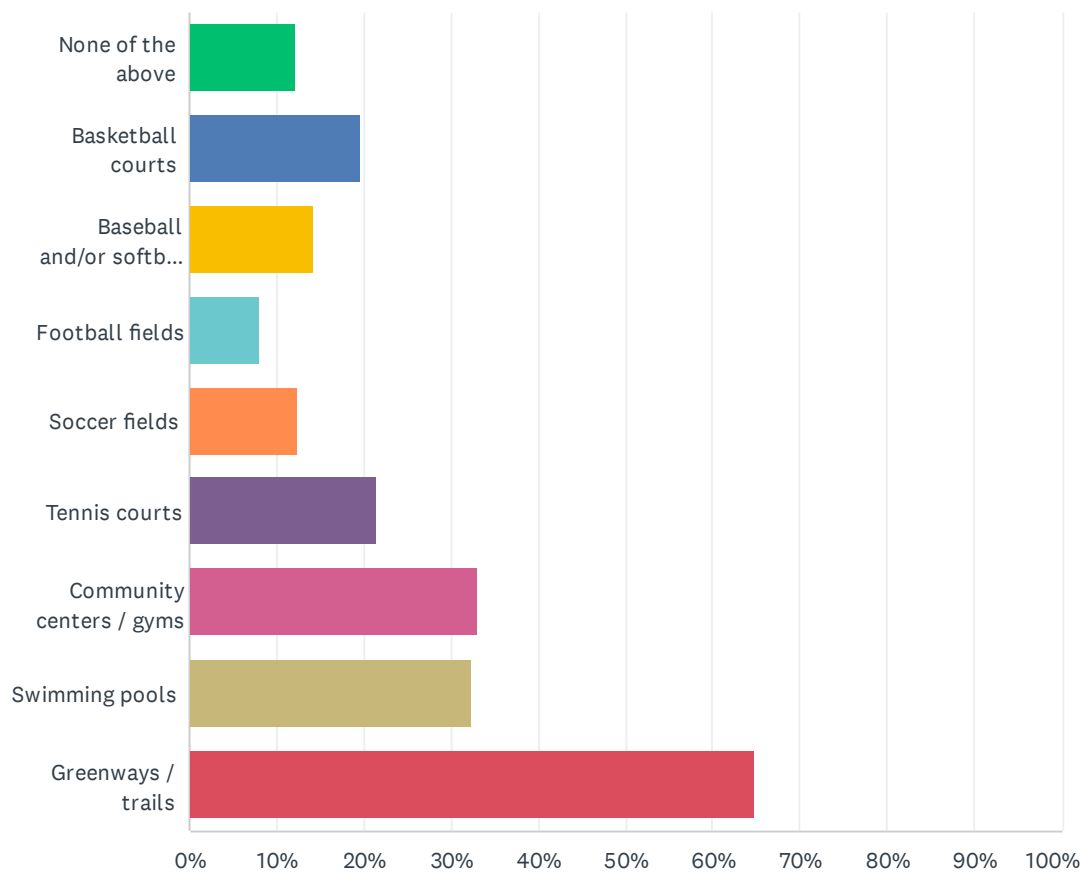
Answered: 1,137 Skipped: 20



ANSWER CHOICES	RESPONSES	
Museums	12.14%	138
Theaters for movies	9.06%	103
Performing arts venues (plays, dance, music, etc.)	18.21%	207
Special events and festivals	55.23%	628
Other (please specify)	5.36%	61
TOTAL		1,137

Q7 What specific types of recreational facilities are needed in Tullahoma, including more facilities if they already exist? (please select all that apply)

Answered: 1,086 Skipped: 71

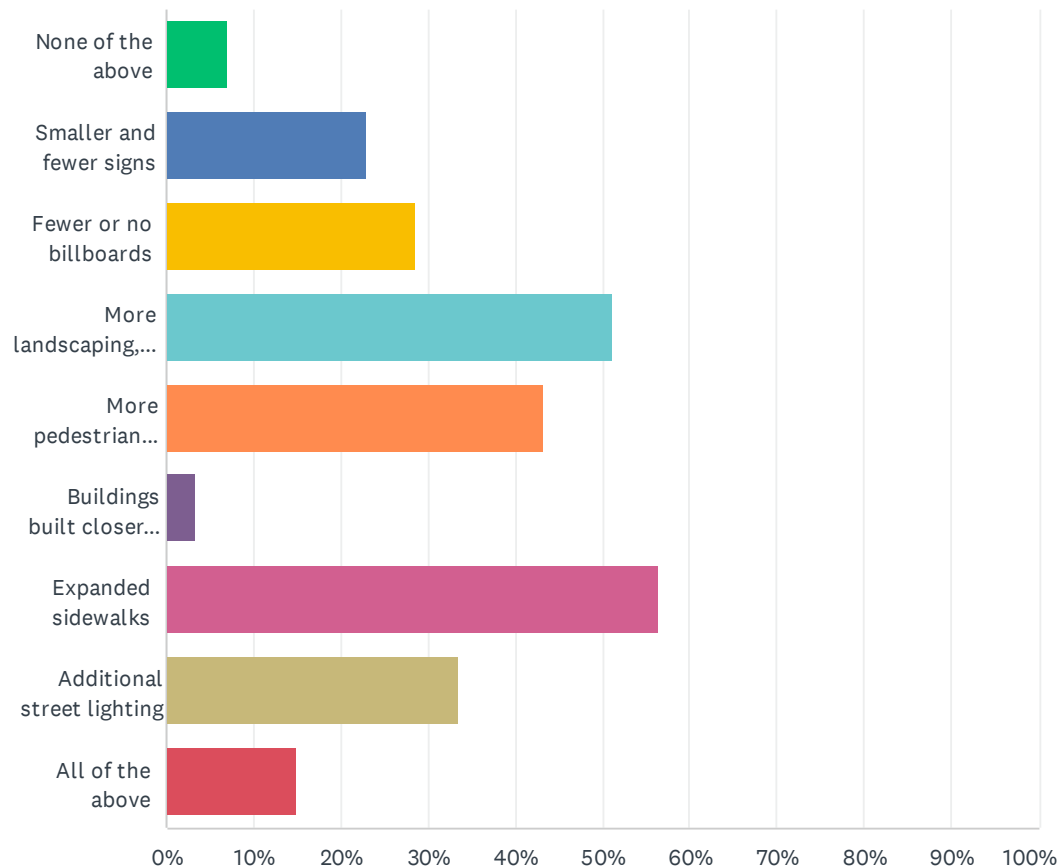


Tallahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
None of the above	12.25%	133
Basketball courts	19.61%	213
Baseball and/or softball fields	14.27%	155
Football fields	8.10%	88
Soccer fields	12.34%	134
Tennis courts	21.45%	233
Community centers / gyms	33.06%	359
Swimming pools	32.50%	353
Greenways / trails	64.73%	703
Total Respondents: 1,086		

Q8 Jackson Street / Hwy. 41A is a key thoroughfare for Tullahoma. If this thoroughfare and adjacent lands were to be physically improved, what types of specific improvements would you like to see? (please select all that apply)

Answered: 1,120 Skipped: 37



Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
None of the above	7.05%	79
Smaller and fewer signs	22.95%	257
Fewer or no billboards	28.57%	320
More landscaping, including street trees	51.16%	573
More pedestrian crossings	43.30%	485
Buildings built closer to the street	3.39%	38
Expanded sidewalks	56.43%	632
Additional street lighting	33.48%	375
All of the above	15.00%	168
Total Respondents: 1,120		

Q9 Please tell us what you like about Tullahoma.

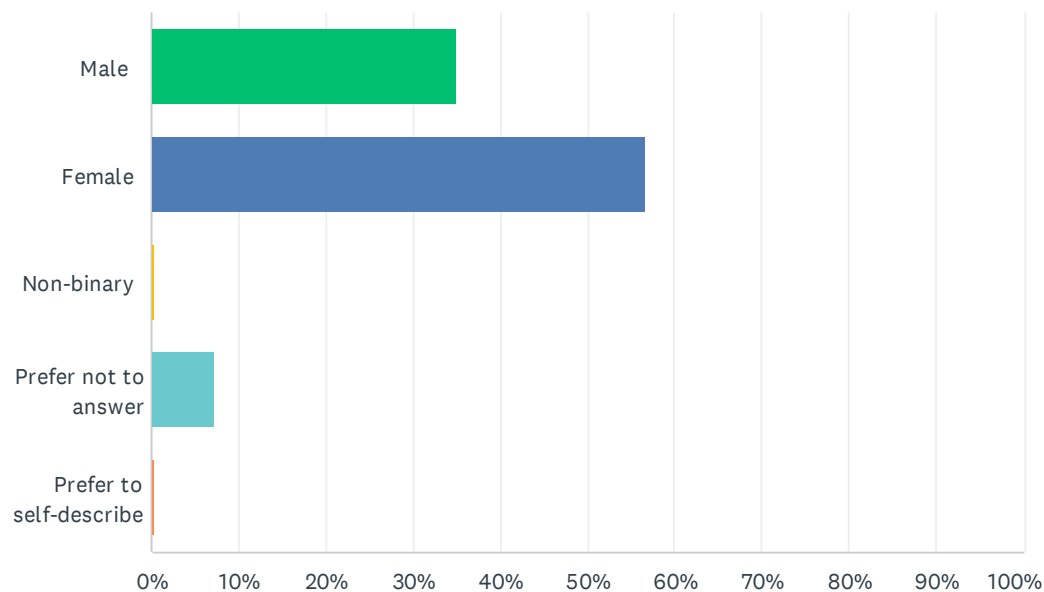
Answered: 948 Skipped: 209

Q10 Please tell us how you would like to see Tullahoma change.

Answered: 988 Skipped: 169

Q11 What is your gender?

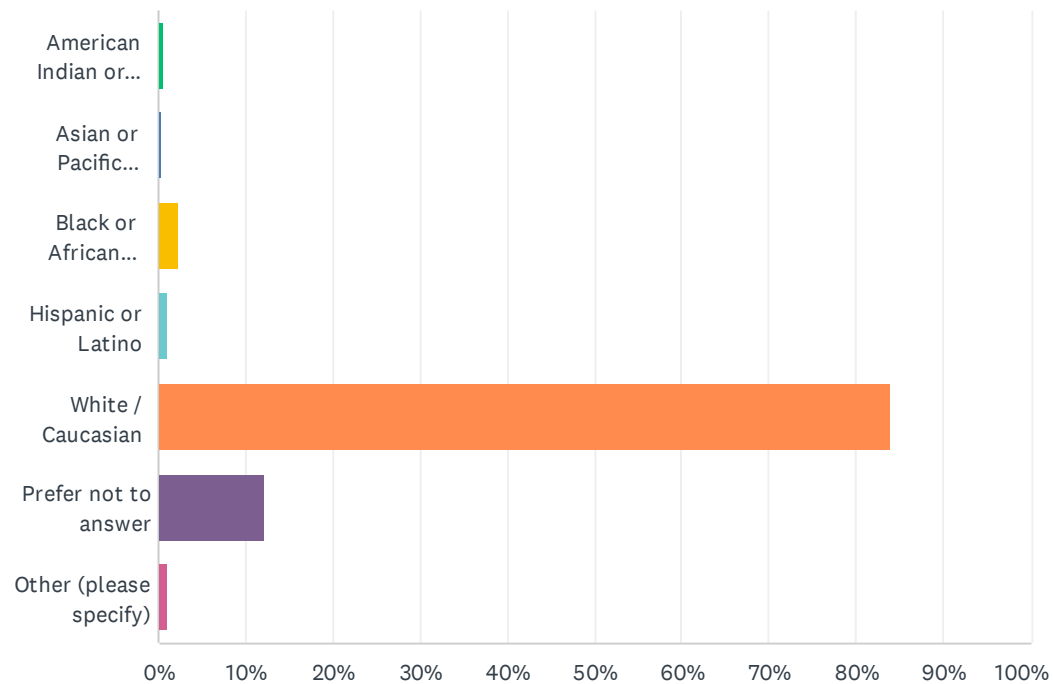
Answered: 1,141 Skipped: 16



ANSWER CHOICES	RESPONSES	
Male	35.06%	400
Female	56.70%	647
Non-binary	0.44%	5
Prefer not to answer	7.27%	83
Prefer to self-describe	0.53%	6
TOTAL		1,141

Q12 What is your ethnicity? (Please select all that apply.)

Answered: 1,144 Skipped: 13

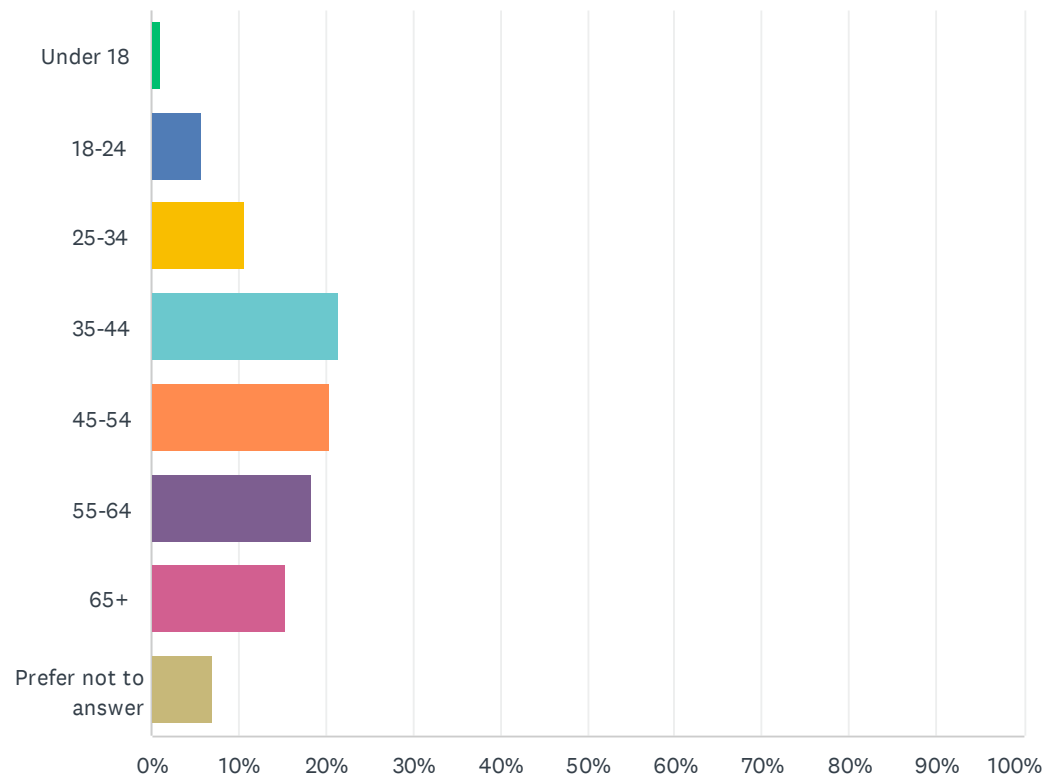


Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
American Indian or Alaskan Native	0.70%	8
Asian or Pacific Islander	0.35%	4
Black or African American	2.27%	26
Hispanic or Latino	1.14%	13
White / Caucasian	83.92%	960
Prefer not to answer	12.24%	140
Other (please specify)	1.14%	13
Total Respondents: 1,144		

Q13 What is your age range?

Answered: 1,146 Skipped: 11

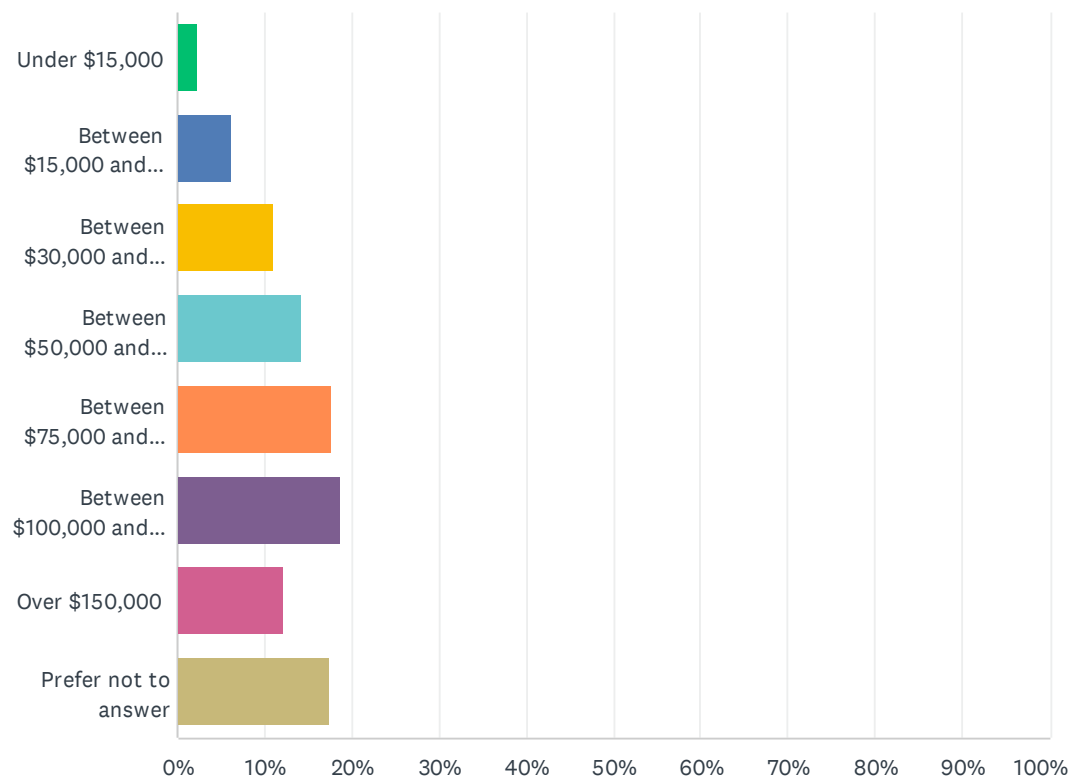


Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
Under 18	1.05%	12
18-24	5.67%	65
25-34	10.73%	123
35-44	21.47%	246
45-54	20.51%	235
55-64	18.32%	210
65+	15.27%	175
Prefer not to answer	6.98%	80
TOTAL		1,146

Q14 What is your annual household income range during a typical recent year (not including any impacts from COVID-19)?

Answered: 1,144 Skipped: 13

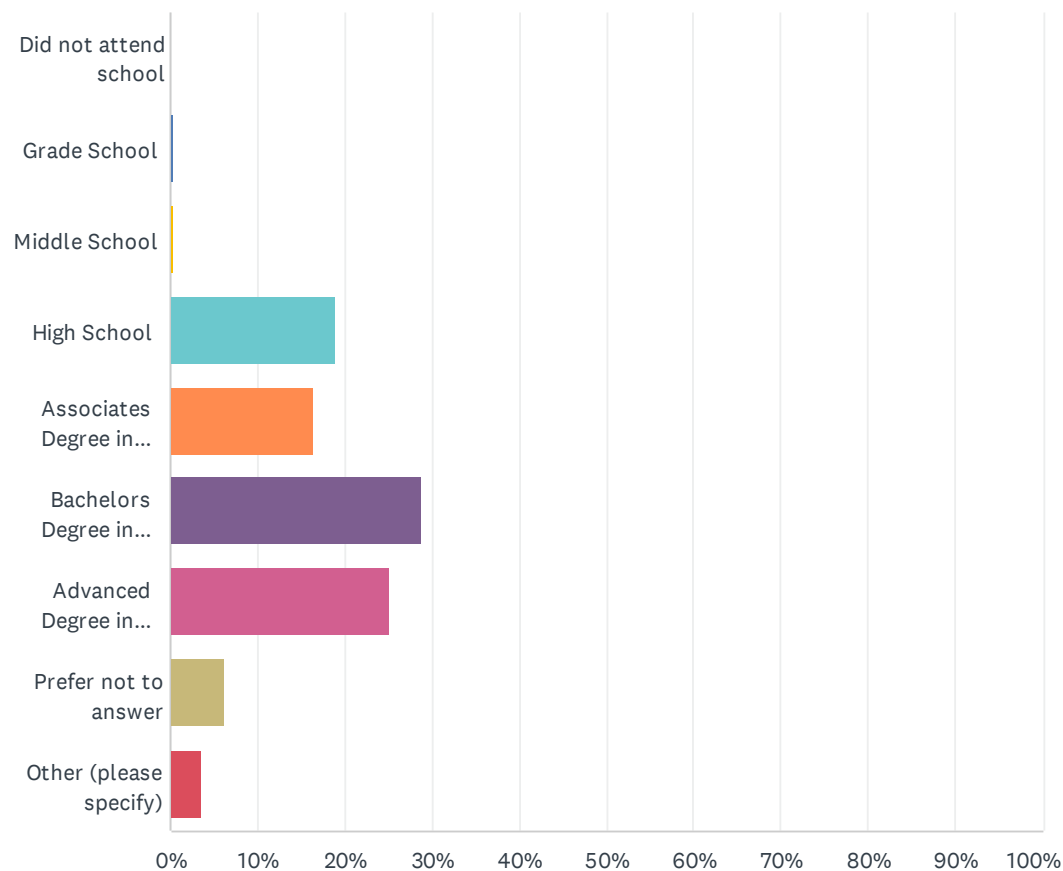


Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
Under \$15,000	2.45%	28
Between \$15,000 and \$29,999	6.21%	71
Between \$30,000 and \$49,999	11.01%	126
Between \$50,000 and \$74,999	14.34%	164
Between \$75,000 and \$99,999	17.74%	203
Between \$100,000 and \$150,000	18.71%	214
Over \$150,000	12.06%	138
Prefer not to answer	17.48%	200
TOTAL		1,144

Q15 What is the highest level of education you have completed?

Answered: 1,132 Skipped: 25



Tulahoma Comprehensive Plan Survey

ANSWER CHOICES	RESPONSES	
Did not attend school	0.00%	0
Grade School	0.44%	5
Middle School	0.44%	5
High School	19.08%	216
Associates Degree in college	16.34%	185
Bachelors Degree in college	28.80%	326
Advanced Degree in college (Masters, Doctorate, etc.)	25.18%	285
Prefer not to answer	6.18%	70
Other (please specify)	3.53%	40
TOTAL		1,132

Tullahoma Comprehensive Plan

APPENDIX B.

ECONOMIC BASELINE ANALYSIS

ECONOMIC BASELINE ANALYSIS

Tulahoma Comprehensive Plan

Key Inputs

Prepared for The Walker Collaborative
And the City of Tullahoma
October 29, 2021

By **Randall Gross / Development Economics**

DEMOGRAPHICS

Key demographic characteristics are examined below, including trends showing how the population is changing in Tullahoma and throughout the Tullahoma-Manchester Micropolitan Statistical Area (which includes Coffee, Franklin, and Moore counties). Factors considered include population and households, income, poverty rates, education levels, and others.

Population and Households

Tullahoma had a 2020 Census population of 20,339, a moderate increase of about 1,800 or 9.6% since 2010. By comparison, nearby Manchester (the County Seat of Coffee County) had a 2020 Census population of just 12,212, but this number is up by 2,100 or 20.9% since 2010. Thus, Manchester has been growing and more than twice the rate of Tullahoma.

Table 1. DEMOGRAPHIC TRENDS, TULLAHOMA AND MSA, 2010-2019/20				
Factor / Area	2010	2019-20	2010-2019 Change Number	Percent
Population				
Tullahoma	18,561	20,339	1,778	9.6%
T-M MSA	99,664	107,124	7,460	7.5%
Households				
Tullahoma	7,508	8,079	571	7.6%
T-M MSA	39,015	40,564	1,549	4.0%
Household Income				
Tullahoma	\$ 45,139	\$ 48,770	\$ 3,631	8.0%
T-M MSA	\$ 47,122	\$ 51,361	\$ 4,239	9.0%
Note:	Income expressed in constant 2020 dollars.			
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

Overall, the Tullahoma-Manchester MSA population was 107,124 in 2020, an increase of about 7,500 or 7.5% since 2010. Growth in the urban hubs of Tullahoma and Manchester accounted for more than 50% of the total population growth in the three-county micropolitan area.

Household growth has been slower than population growth in the area, suggesting that average household size is increasing. However, the full 2020 Census numbers on households were not released by the time of this analysis so the most recent numbers reflect estimates made as part of the 2019 American Community Survey. Tullahoma had an estimated 8,079 households in 2019, up 7.6% from 2010. MSA household growth was estimated at 4.0%. Households form the primary purchasing unit for retail and consumer goods, so slow household growth can place a drag on business expansion.

Age

The city's population, like that of the nation as a whole, is aging. In 2010, the city's median age was 38.1 but by 2019, it is estimated that the city's median age had increased slightly to 39.3. While the share of the population under the age of 5 has increased slightly, the number over age 65 increased from 14.8% to 17.7% of Tullahoma's population. As the Baby Boom generation ages nationwide, it continues to drive demand for housing, goods, and services. That generation has entered their retirement years and is more affluent than any past generation, so there will be increasing interest and disposable income directed less at schools and family housing; and more to travel, restaurants, "maintenance-free" housing, and amenities.

Ethnicity

About 83% of residents in Tullahoma listed their race at "white alone" in the 2020 Census, down slightly from 88% in the 2010 Census. The population is slowly becoming more diverse, but not in terms of individual races. For example, the share of residents listing their race as "black or African American alone" also fell between 2010 and 2020. What is increasing is the number of people of mixed-race along with the Hispanic population of all races. The number of people of two or more races increased from 2.5% in 2010 to 6.7% by 2020, which is now larger than the total black population. The Hispanic or Latino population increased modestly from 3.1% to 4.6% and now represents about 1,000 people in the city. Importantly, nearly 5.0% of the city's population speaks a language other than English at home.

Income

The median household income in Tullahoma was estimated at \$48,770 in 2019, up by 8.0% from 2010 after accounting for inflation. Income in the larger 3-county micropolitan area was slightly higher, at \$51,361, an increase of 9.0% since 2010 in constant

dollars. These numbers compare to the national 2019 median income of \$69,560. Thus, Tullahoma's income was 30% lower than the nation's median, but the cost of living in Tullahoma is estimated to be about 11% lower than the national average, according to the Council for Community and Economic Research (C2ER). Housing is much less expensive in Tullahoma than in other parts of the country, but some costs (like utilities and transportation) are fairly comparable and in some cases, Tullahoma is more expensive than the national average. For example, the median asking rent for apartments in the U.S. is \$1,588 per month, while it is estimated at about 30% lower (\$1,100) in Tullahoma. But the cost of "goods and services" in Tullahoma is 4% *higher* than the national average, according to the October 2021 C2ER data.

Poverty

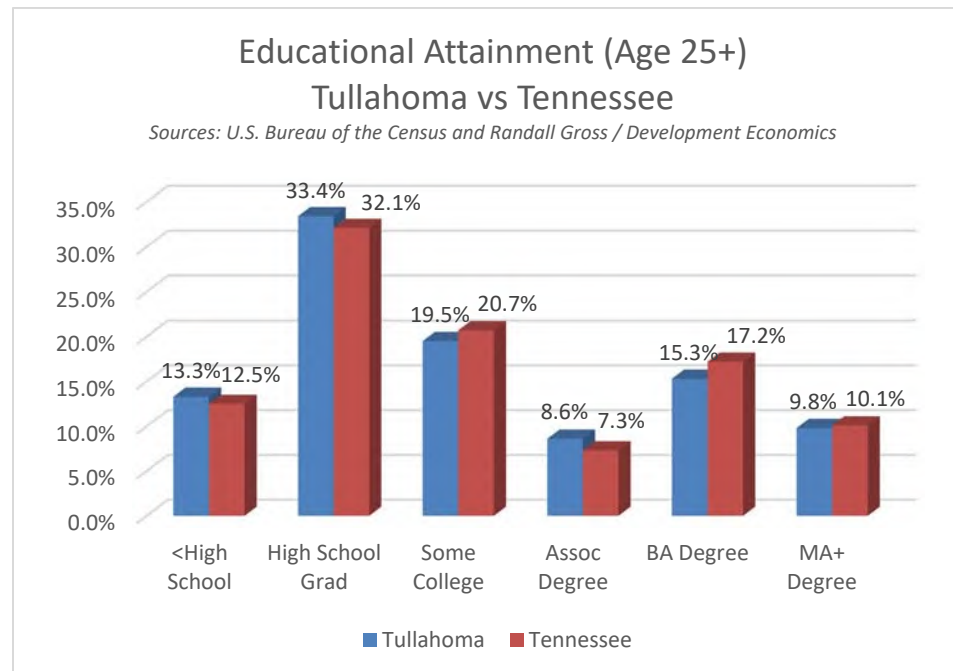
Tullahoma had an estimated poverty rate of 18.2%, according to the 2019 American Community Survey. This compares to a statewide average of 15.3% and a national average of 10.5%. So, the city's poverty rate is slightly elevated in comparison to the state but *73% higher* than the national average. Among cities, Tullahoma was ranked 46th in the state (about the same as Columbia and Bristol) out of 100 ranked cities, or somewhere in the middle. Some nearby cities had lower poverty rates, such as Manchester (13.5%), Winchester (14.3%), Murfreesboro (15.1%), and Spring Hill (2.8%). On the other hand, some cities near Tullahoma had higher poverty rates, such as Lewisburg (21.2%), Shelbyville (21.8%), Fayetteville (28.2%), and McMinnville (35.4% - 2nd highest in the state). Thus, while *no level of poverty is acceptable*, Tullahoma's poverty levels are typical for Tennessee.

Education

There is the perception that Tullahoma's residents have higher levels of education because of the presence of Arnold Engineering Development Complex (AEDC), the U.T. Space Institute, and government contractors that have attracted so many highly educated scientists and engineers to the city. Tullahoma's schools are also highly regarded, and student performance is relatively good. The city often promotes its highly-educated workforce as an important asset for business development.

But in reality, Tullahoma's adult residents, on average, have attained lower levels of education than residents of the state as a whole (and Tennessee education levels lag behind the country). The share of Tullahoma's population over age 25 with a higher education degree was estimated at 25.1%, according to the 2019 American Community Survey. But the share of Tennessee residents in that same age cohort with higher-level degrees was estimated at 27.3%. And more than 32.2% of American adults overall have higher degrees. About 10.1% of Tennessee's adult residents have a masters or professional degree, and 9.8% of Tullahoma's residents have those degrees. On the other end, about 12.5% of Tennessee's adult residents have not achieved a High School diploma or equivalent, but 13.3% of Tullahoma residents have not done so.

Where Tullahoma does exceed the state average is on High School graduates, with 33.4% (versus 32.1% statewide) and on those with Associates degrees (8.6% in Tullahoma, versus 7.3% in the state as a whole). Part of the reason for this apparent discrepancy may relate to the number of successful Tullahoma high school graduates that leave the community to pursue higher education (and eventually to live) elsewhere. Those numbers may not be completely replaced by the engineers and other highly-skilled workers who come to Tullahoma from other places to work. Thus, the adult population in Tullahoma includes those who did not pursue higher education elsewhere (and some who did and returned), along with those highly-educated workers who relocated to the city from other places.



This issue might be addressed through economic development strategies aimed at retaining and attracting back exceptional Tullahoma natives who otherwise leave town to pursue higher education and employment opportunities elsewhere. That educated labor force is essential as a base for business growth, expansion, and recruitment.

ECONOMIC BASE

Tullahoma has a relatively diverse economic base, with about 12,000 jobs among its various industries. Arnold Air Force Base (Headquarters for the Arnold Engineering Development Complex (AEDC)) is a major driver for the local economy, employing 1,736 military personnel, Defense civilians, and (primarily) private contractor personnel.¹ In addition, TVA estimates that AEDC generates another 1,198 secondary jobs in construction, retail and other industries in the area economy. The total economic impact of AEDC is estimated at \$680.2 million in FY2020.² Since AEDC is not located within the City limits of Tullahoma, these employment figures are not included in economic data for the city. But the base has long had an outsized impact not only on the local economy but on the local culture and the city's image in the region.

Leading Sectors

Within the city of Tullahoma, health care is a leading sector, with 15% of local employment. The largest medical facility in the city (formerly operated by Tennova Healthcare) was recently purchased and is now operated by Vanderbilt as Vanderbilt Tullahoma-Harton Hospital. The 135-bed hospital employs about 450 doctors, nurses, and staff. Other medical and health care services have clustered around the hospital to serve Tullahoma and the surrounding area. Retail trade also accounts for about 15% of local employment, distributed among "big box" stores like Walmart, other chains and franchise stores, and smaller independent businesses. Professional, scientific, and technical service businesses employ the third largest share, at 13%. The high number of technical jobs in Tullahoma is directly related to the presence of AEDC and its contractors, who are engaged in engineering and testing functions at the base. Manufacturing accounts for about 11% of the city's employment base.

Tullahoma has several large manufacturing companies supplying both the automotive and aerospace industries. Other manufacturing companies supply packaging, envelopes, machine components, protective clothing, and other products. Finally, accommodation ^{and} foodservice services (including lodging facilities and restaurants) accounts for another 10% of the local employment base. Overall, the city clearly has an economic base oriented to the aerospace industries, thanks to the presence of AEDC.

¹ Arnold Air Force Base (AEDC Public Affairs, 3/14/2021).

² Ibid.

Major Employers

Vanderbilt Tullahoma-Harton Hospital

Aside from AEDC and ~~Vanderbilt~~, major non-retail employers in Tullahoma include Ascend Federal Credit Union (headquarters with 45 employees, 620 companywide), Jacobs Engineering Group, Inc. (89 employees in Tullahoma), T&E Connectivity (electrical connectors for aircraft, 239 employees), Cubic Transportation Systems (auto revenue collection devices, 235), JSP International (engineered plastic foam, 177), WISCO Envelope Corporation (envelopes, 202), Schmiede Corporation (precision machinery, 157), Sonoco Corporation (custom-moulded packaging, 150), Micro Craft (parts for aerospace industry, 63), Coca Cola (bottling, 95), Tennessee Apparel (protective clothing, 86), and others. Tullahoma is also located at the heart of Tennessee whiskey country. Cascade Hollow Distilling Company is home to the George Dickel brand in Normandy, just about 7 miles or 11 minutes from downtown Tullahoma. Jack Daniel's employs nearly 400 people at its famous Lynchburg distillery, located just 12 miles or about 15 minutes away.

Distillery

Employment Trends

The city of Tullahoma lost about 2,600 jobs or 18.5% between 2002 and 2010, largely as a result of severe losses in professional/technical, manufacturing, and retail employment during that period including the national recession of 2008-09. However, the city regained a handful (about 90) of those jobs by 2018. There has been consistent growth since 2002 in a few industries, namely health care, accommodation services, wholesale trade, and the public sector. But since 2010, there has also been growing employment again in professional & technical services (which regained about 400 of the jobs lost in the early 2000s), as well as in management services, information services, and arts & entertainment. Over the 16-year period, the fastest growth was in management services, although employment remained small (at 325 in 2018) in comparison to other sectors. The large role of military contracting can impact significantly on local employment. Thus, while the economic base seems diverse on the surface, underlying dependency on government spending means that various industries (manufacturing, retail, professional services) are tied to the same funding sources.

During the COVID-19 Pandemic, Tullahoma (like the country and the world as a whole) felt sudden economic dislocations that resulted in the unemployment rate skyrocketing from about 4.0% to 21.0% within the period of one month. Since that time, unemployment has fallen precipitously and has returned to pre-Pandemic rates.

Declining Share of MSA Employment. It's also important to note that, while Tullahoma's employment stagnated over many years, the regional economy represented by the 3-county Tullahoma-Manchester Micropolitan Statistical Area (MSA) saw economic growth. Between 2002 and 2018, employment in the MSA increased by nearly 5,000 jobs or 13.9% to a total of almost 40,000. While the region lost about 2,000 jobs between 2002 and 2010, it has added more than 7,000 since then. As a result, Tullahoma's share of MSA employment fell from 40% in 2002 to 35% in 2010, and then down to 29% by 2018. The economic development strategy included in this plan will address some of the disparity between Tullahoma and growth in the surrounding region.

Table 2. AT-PLACE EMPLOYMENT TRENDS, TULLAHOMA, 2002-2018					
Industry Sector	2002	2010	2018	2002-2018 Change Number	Percent
Agriculture	-	1	-	-	N/A
Mining	2	-	-	(2)	-100.0%
Utilities	129	145	137	8	6.2%
Construction	555	391	269	(286)	-51.5%
Manufacturing	2,645	1,946	1,254	(1,391)	-52.6%
Wholesale Trade	275	234	290	15	5.5%
Retail Trade	2,376	1,648	1,783	(593)	-25.0%
Transport	164	160	122	(42)	-25.6%
Information	216	173	258	42	19.4%
Finance	424	643	371	(53)	-12.5%
Real Estate	112	140	91	(21)	-18.8%
Prof/Tech	2,080	1,138	1,555	(525)	-25.2%
Management	135	17	325	190	140.7%
Admin	891	949	910	19	2.1%
Education	898	692	660	(238)	-26.5%
Health Care	1,533	1,672	1,746	213	13.9%
Art, Entertainment	116	49	74	(42)	-36.2%
Accommodation	783	876	1,172	389	49.7%
Other	535	360	195	(340)	-63.6%
Government	249	272	379	130	52.2%
TOTAL	14,118	11,506	11,591	(2,527)	-17.9%
Sources:	U.S. Bureau of the Census & Randall Gross / Dev. Econ.				

ECONOMIC DEVELOPMENT STRUCTURE

There are a number of local, state, and federal agencies, institutions, and organizations engaged at various levels in the Tullahoma area's economic development. The **Tullahoma Area Economic Development Corporation** (TAEDC) is a primary point of contact for economic development incentives and services offered by the City of Tullahoma. The Coffee County and Franklin County **industrial development boards** offer financing through IRBs (industrial revenue bonds, discussed later in this section) for industrial development in Tullahoma and the two counties in which Tullahoma is located. A "laundry list" of these entities includes the following, among others:

- **City of Tullahoma Agencies, Authorities, ^{and} Committees**
 - Tullahoma Area Economic Development Corporation (TAEDC)
 - City of Tullahoma Tourism Committee
 - Tullahoma Airport Authority
 - Tullahoma Utilities Authority
 - Dream Tullahoma Committee
- **Coffee ^{and} Franklin County Agencies**
 - Coffee County Joint Industrial Development Board
 - Franklin County Industrial Development Board
- **Tennessee State Agencies**
 - Tennessee Department of Economic ^{and} Community Development
- **U.S. Federal Government Agencies**
 - Tennessee Valley Authority
 - USDA Rural Development
 - Appalachian Regional Commission (Coffee, Franklin)
- **Training ^{and} Educational Institutions**
 - Motlow State Community College
 - University of Tennessee Space Institute
 - Tullahoma City Schools

- **Utilities**

- Duck River Electric Membership
- Elk River Public Utility District
- Middle Tennessee Industrial Development Association (electricity ~~&~~ ^{and} gas distributors)

- **Non-profit Agencies**

- Tullahoma Area Chamber of Commerce
- South Central Tennessee Development District
- Southern Middle Tennessee Entrepreneur Centers
- Tullahoma Sports Council

Target Sectors

Several target business sectors have been identified for Tullahoma in its business retention and recruitment efforts. Among these are aerospace ~~&~~ ^{and} aviation, health services ~~&~~ ^{and} biomedical industries, retail trade, and technology. These target sectors were identified based on Tullahoma's existing clusters and inherent strengths.

Aerospace and Aviation. Tullahoma Government notes that the city has developed into “a hub for global commercial aerodynamic testing, advanced modeling simulations, air defense projects, and space exploration.” As the home to the world's largest aeronautics testing facilities, Tullahoma has some unique competitive advantages for developing aviation-related industries. Key target industries within this cluster have been identified to include products and systems for commercial aeronautics, space markets and the military, aircraft and aircraft parts manufacturing, aerospace/aviation instruments, missile systems, defense communications and detection systems, and materials and component suppliers to other manufacturers.³ The City's Airport Authority has made investments in the Tullahoma Regional Airport to upgrade it to achieve Select Tennessee certification and to develop a 114-acre Business Airpark. The City has been marketing and engaged in relationship building to promote the airpark and recruit aerospace and aviation-related businesses.

Health Services ~~&~~ ^{and} Biomedical Industries. As noted above, the City has also identified health services and biomed as target areas of business recruitment and development. Tullahoma is centrally located and serves as a medical services hub as home to ~~Vanderbilt Tullahoma-Horton Hospital~~ ^{Vanderbilt Tullahoma-Horton Hospital} and Vanderbilt LifeFlight. The hospital has helped spin-off other medical services, creating a

³ Winston Brooks: *The Making and Marketing of a Competitive Tullahoma Airport Business Airpark (Executive Summary)*, City of Tullahoma

small medical cluster. The link between the city's medical services and LifeFlight further strengthens Tullahoma's aviation cluster and illustrates the interconnectivity with health care.

Retail Trade. Again because of its central location, Tullahoma has long-served as the hub for retail trade within Coffee, Franklin, and Moore counties. The City also benefits from the tax base generated through retail and restaurants, and has employed retail recruitment specialists to help Tullahoma attract more commercial activity and grow its retail sector.

Technology. AEDC and various local contractors and manufacturers are engaged in producing, testing, as well as in research and development of emerging technologies related to aviation and aeronautics. "Technology" constitutes a broad category of businesses that includes at least 50 industries classified by the National Science Foundation as "high-tech." Such industries range from Semiconductor and other electronic component manufacturing (North American Industrial Classification System (NAICS) #3344) to Internet service providers and Web search portals (NAICS 518111). The Bureau of Labor Statistics (BLS) classifies many technology-related industries within NAICS code 54 – Professional, Scientific, and Technical Services – which includes (among other things), Computer Systems Design & Related Services (NAICS 5415); Management, Scientific, and Technical Consulting Services (NAICS 5416); Scientific Research & Development Services (NAICS 5417); and Other Professional, Scientific, and Technical Services (NAICS 5419). Since many information technology-driven businesses rely on Internet capacity, the Tullahoma Utilities Board offers 100% fiber with rapid download speed.

Local Incentives, Services, ^{and} Policies

Tullahoma offers several economic development incentives, including PILOT (Payment In-Lieu-Of Taxes), IRBs, and loans. The City also offers a Single Point-of-Contact program marketed as a "One-Stop Shop" to help "Fast Track" application and permitting processes or access to City services. TAEDC and its partners work with prospective companies on site selection, data collection, workforce development, and assistance with the approvals and permitting process. TAEDC publishes a guide to starting a business in the city and provides other guidance to incoming and expanding businesses.

The Payment In-Lieu-Of Taxes (PILOT) program enables new and expanding companies to enter into a lease-back arrangement with TAEDC in order to reduce the tax burden for qualified projects generating large capital investments, significant employment, and high wage rates. The City can apply PILOTs on a case-by-case basis to industrial real property as well as personal property.

TAEDC and the Coffee County Industrial Development Board can issue tax-exempt bonds in order to finance manufacturing and other qualified industrial facilities. The bonds can be used to finance the acquisition of land, buildings, or equipment. Bond rates are determined based on the financial strength of the company. The City can also offer small business loans and access to the Rural

Small Business and Entrepreneurship Loan Fund. A Commercial Revolving Loan Fund (originally funded through the federal Urban Development Action Grant (UDAG) program, at 4% below Prime) and Small Business Revolving Loan Fund (funded through the U.S. Department of Agricultural Rural Development Administration, at 4% below Prime) are available to assist with small business financing and development. Eligibility for loan funds is contingent in part on levels of employment generated.

Tullahoma Comprehensive Plan

APPENDIX C.

HOUSING MARKET ANALYSIS

HOUSING MARKET ANALYSIS

Tullahoma Comprehensive Plan



Prepared for The Walker Collaborative
And the City of Tullahoma
October 24, 2021

By **Randall Gross** / *Development Economics*

INTRODUCTION

This report summarizes results of Housing Market Analysis (HMA) completed as input to the Comprehensive Plan for Tullahoma. This work was completed to help inform the planning effort and provide guidance in terms of marketing and development concepts that may be viable in the city.

Section 1 of this report provides an overview of existing conditions conducted to assess the city's existing housing market and conditions impacting on the marketability of housing in Tullahoma. Section 2 assesses housing demand within the market area and in specific niches that form components of the Tullahoma market. Development potential is forecasted in Section 3 for both affordable and market-rate housing within the competitive context. Section 4 provides initial strategic recommendations for marketing and development, as well as for leveraging of housing assets, based on the findings of the market analysis.

Section 1. EXISTING CONDITIONS

This section summarizes existing housing market conditions in Tullahoma, in terms of the existing housing supply and construction trends, tenure, occupancy, pricing, and other factors. Information on the city's neighborhoods and positioning within the region is discussed, along with a description of general housing conditions. A physical housing conditions assessment was not conducted as part of this market analysis but is nevertheless recommended to help guide the City as it develops mechanisms to enhance and improve the existing housing stock.

Housing Supply ^{and} ~~and~~ Market Conditions

General housing market conditions were analyzed in order to provide context for an analysis of housing demand and the potential for development within Tullahoma. Housing supply and construction trends, sales, occupancy, and pricing are among the factors discussed below, with a focus on the city of Tullahoma and key markets.

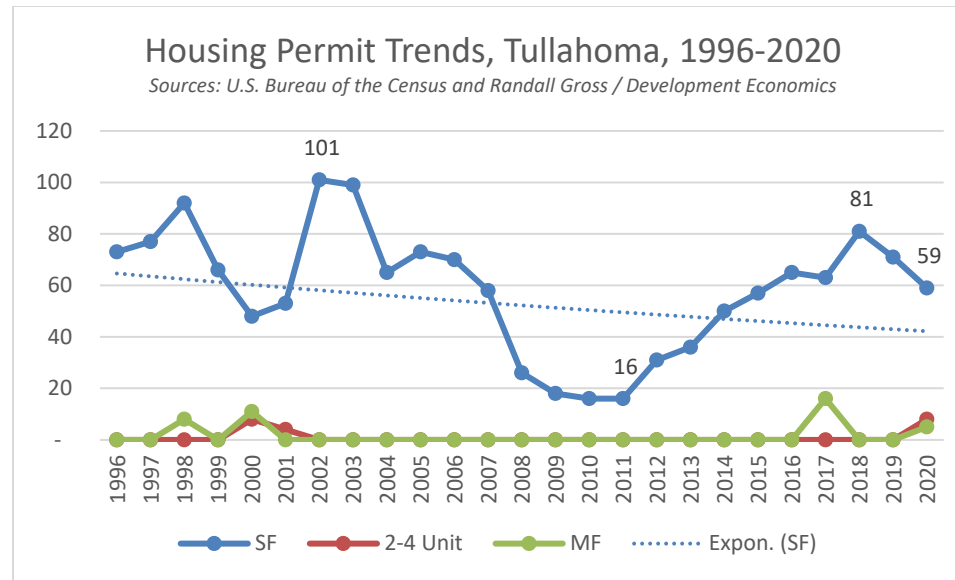
Housing Supply

Tullahoma had an estimated 8,820 housing units in 2019, up by 7% from 2010. The city's housing stock is dominated by single-family detached units which accounted for about 76% of all housing in 2019. While single-family predominates, the city does have a fairly substantial supply of duplexes, with nearly 800 2-4-unit buildings accounting for about 9% of housing in the city. The total number of housing units in Tullahoma increased by nearly 600 or 7.1% between 2010 and 2019. About 400 of those 600 units were in single-family detached homes but the fastest increase was in the 2-4-unit buildings, with the city adding nearly 300 or 55% to the existing supply. Meanwhile, the number of buildings with 10 to 19 units fell, as did the number of mobile homes, according to Census data. About 92% of housing units were occupied in 2019, according to Census estimates. Occupancy was highest in single-family attached units (e.g., townhouses), at nearly 100%, and lowest in 2-3-4-unit buildings (<80%) and mobile homes (79%). General housing supply trends are summarized below.

Table 1. HOUSING SUPPLY TRENDS, TULLAHOMA, 2010-2019				
Units in Building			2010-2019 Change	
	2010	2019	Number	Percent
1-Detach	6,295	6,697	402	6.4%
1-Attach	171	180	9	5.3%
2-4	510	789	279	54.7%
5-9	453	505	52	11.5%
10-19	161	134	(27)	-16.8%
20-49	194	249	55	28.4%
Mobile/Other	453	269	(184)	-40.6%
TOTAL	8,237	8,823	586	7.1%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

Tenure. Tullahoma has a higher share of owner-occupied housing (60%) than of housing that is renter-occupied (40%). The largest portion of the city's rental housing is in single-family homes, with about 1,680 detached houses renter-occupied, according to 2019 Census estimates, accounting for about 27% of the city's occupancy in single-family housing and 51% of the city's rental housing. About 41% of the city's rental housing is in multi-family buildings (with the remainder in mobile homes). Thus, the majority of Tullahoma's renters live in single-family housing.

Construction Trends. The City of Tullahoma has permitted a total of about 1,500 housing units over the past 25 years (since 1996), for an average of approximately 60 per year.

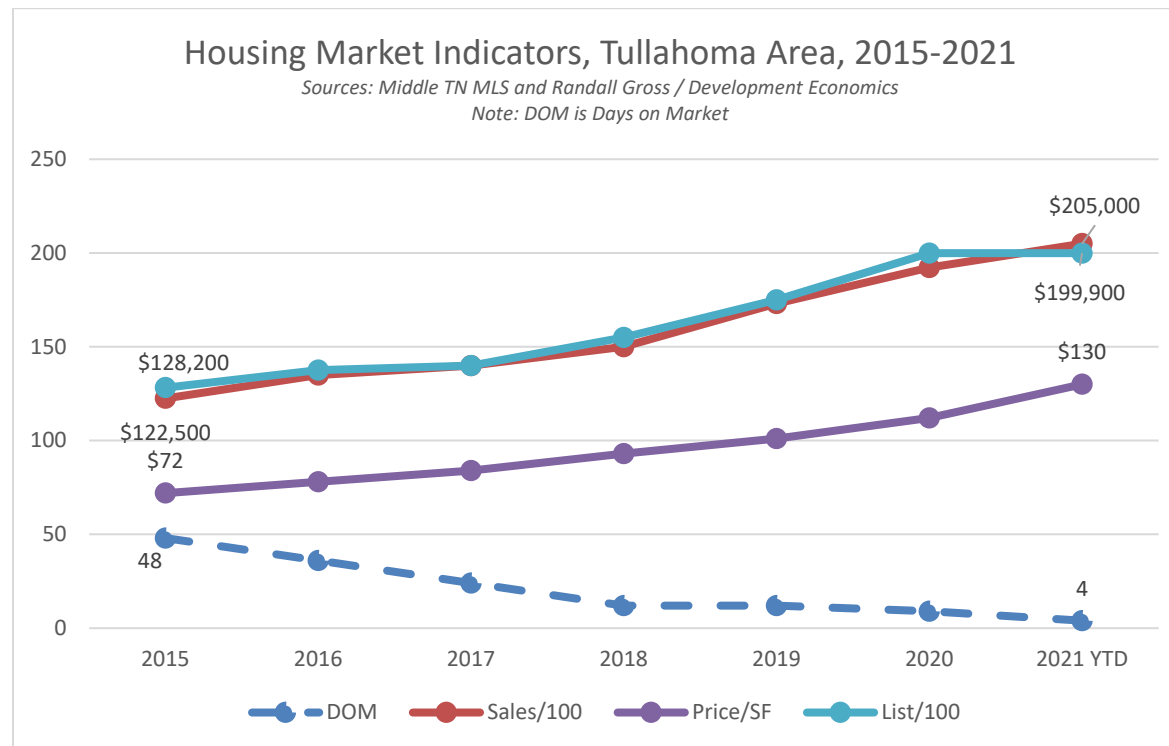


About 59 of those 60 units permitted each year are for single-family units and there has been very little multi-family construction in Tullahoma in many years (with a total of just 60 units permitted over 25 years in 2-3-4 and multi-family buildings). Lenox Townhomes (16 townhouse units built in 2018) were among the only multi-family units built in the city since 2000. Overall, there has been a downward trend in construction in Tullahoma as indicated in the chart above. Between 1996 and 2003, the City permitted an average of 80 units per year. That number fell to 58 per year between 2004 and 2008, and then to only 28 per year during the recessionary period from 2009 and beyond to 2014. Since 2015, the City has permitted an average of 71 units per year. So, while construction has recovered from a decade of recession and low growth, it has still not kept up to the pace generated earlier in this century. The most recent data through August 2021 indicate that the City has permitted an annualized average of 69 units and therefore, lower than the previous average. The detailed housing trends by year and housing type are summarized in tabular form in the Appendix.

Housing Sales Trends

There were 466 homes sold in the Tullahoma market in 2020. The number of homes sold in the market has increased by 23.5% over the last five years since 2015. However, as inventory of homes on the market has gradually stagnated, the increase in number of sales is also slowing.

Prices. The median Tullahoma home value increased by 20.5% between 2010 and 2019, according to the American Community Survey, with a 2019 estimated median of \$146,500.



Homes listed on the market are going for higher prices. Multiple Listing Service (MLS) data indicate an increase of 67% in the Tullahoma area median sales price since 2015, from \$122,500 to \$205,000, as of September 2021 (shown on the chart above, as “Sales/\$100”). Meanwhile, list prices (“List/\$100”) increased by 56% over the same period, with sales-to-list price ratios increasing from 96.7% to over 100.0%. While houses have remained relatively stable in size (around 1,600 to 1,700 square feet), the price per square foot (“Price/SF” in the chart) has increased by 81%, from \$72 in 2015 to \$130 by 2021. Since the inventory of houses has not increased appreciably, the number of days that houses remain listed on the market (DOM in the chart) has fallen by 92%, from 48 days in 2015 to 4 days so far in 2021. Coffee County’s housing sales absorption rate is about 0.86 per month, higher than both Manchester’s (0.82) and Shelbyville’s (0.72), according to MLS.

All of these data indicate a robust housing market that may be temporarily under-supplied, which (coupled with low interest rates) is helping to drive up prices. This same demand-supply scenario has been experienced nationwide during the COVID Pandemic, but particularly in regions like Middle Tennessee, where people are moving from the coasts to take advantage of a lower cost of living. Coffee County remains relatively affordable, even in comparison to its neighbors, with sales prices 27% lower than those in Franklin County, 26% lower than those in rural Moore County, and 15% lower than those in Bedford County.

Rental Housing

The total number of renter-occupied housing units increased from 2,600 in 2010 to 3,300 by 2019, and the share of housing occupied by renters increased from 34.7% to 40.4%. Thus, without significant multi-family construction, a large number of single-family homes appear to have been converted to rentals since 2010.

Vacancy. The American Community Survey (ACS) estimated Tullahoma’s rental vacancy rate at 9.6% in 2019, up from 5.5% in 2010. One of the largest local management companies estimates their vacancy in 2021 at 5.0% in 260 single-family housing units, but centrally-managed properties will naturally have lower vacancy than scattered, individually-managed houses. That being said, there are practically no vacant units in multi-family apartment complexes in Tullahoma. As of September 2021, there was only one available rental listing in a non-restricted multi-family structure in the city, and that one was listed for a 3,000 square-foot condominium unit at \$1,500 per month. There were no available listings at complexes including Ada Ferrell Garden Apartments, Continental Apartments, Winchester Court, Tullahoma Village Apartments, Briarwood Apartments, East Gate Apartments, or others in the city. The new, 100+ unit Parkview Senior Living

facility is also fully occupied. By contrast, there were multiple apartment listings in Shelbyville, Fayetteville, Manchester, Murfreesboro, Decherd and other communities within commuting distance to Tullahoma.

Rents. Perhaps aligned with the increase in rental households (demand for rental housing, coupled with a lack of available apartments), Tullahoma median rents have increased by 25% since 2010, from \$607 to \$758, according to ACS. After accounting for inflation, rents have still increased by an average of 6.6% since 2010. The increase in supply of single-family rental homes does not seem to have impacted on rents, perhaps because demand is not being met in the limited supply of multi-family apartments. Also, some of the vacant single-family housing is being held for seasonal occupancy or is not otherwise marketed in the rental market. Two single-family homes listed for rent online in September 2021 were asking \$1,300 and \$1,400 per month each or about \$1.09 per square foot. Management companies have indicated an average rent of \$1,100 per month in 3-bedroom / 2-bath single-family homes.

Neighborhoods

There are perceptions relating to the marketability of neighborhoods in different parts of Tullahoma which fairly align with the four quadrants of the city. Some of these perceptions relate to “East versus West” associated with the railroad tracks that separate the city along Atlantic Street. East Lincoln is perceived as having higher crime rates, higher rates of poverty, and multi-generational households. The housing is perceived to be less well-maintained. Whether or not these perceptions meet reality, there are likely to be portions of Tullahoma that have not benefitted in the past from physical investment in infrastructure and high-quality amenities that may be present elsewhere in the city.

East Tullahoma / Center City has median housing prices in the \$105,000 range, with rents averaging \$898 and vacancy at 12%. According to Neighborhood Scout, the area has a high divorce rate. Nearly 50% of employed residents work in manufacturing, but incomes are low and 49% of children live below the poverty line.

The Briarwood / Tara Estates area by contrast has an average housing price closer to \$200,000. Rents average \$1,100, again according to Neighborhood Scout. Vacancy is estimated at 13%, Briarwood is a low to moderate income area, where about 25% of children live below the poverty line. About 38% of residents work in white-collar professional positions, followed by 27% in service occupations. About 25% are employed in manufacturing.

Westside Heights / Westwood is located on the western side of town and includes the Bel-Aire community. The median housing price is \$170,000, with rents averaging \$1,120. Vacancy is relatively low at around 5.0%. Again, Westside is a middle-income neighborhood, but 23% of children are living below the poverty line. About 35% of working residents are employed in manufacturing, 34% in white-collar professional jobs, and 21% in sales and service.

The Ovoca / Lake Hills area abuts Normandy Lake and includes some of the more exclusive neighborhoods in the area such as The Fairways, associated with Lakewood Golf & Country Club. This portion of Tullahoma is situated closest to Murfreesboro and Cool Springs. Schools are perceived to be desirable in this area, which also offers attractive topographical features and natural areas. The median home price is about \$220,000, with rents averaging \$1,100 like in most of the city (although this is largely an owner-occupied community). Neighborhood Scout notes that this area has a relatively high proportion of military families (even though small overall). An “upper middle” income neighborhood, less than 5% of the children are living in poverty. About 30% of residents work in manufacturing, with another 30% in white collar professional positions. About 25% work in sales and service. Several newly developing areas include Emerald Meadows and Settlers Trace, with homes in the \$250,000 to \$300,000 price range. These newer subdivisions have few lots remaining.

Oak Park is a relatively affluent rural area just south of Tullahoma, with median home prices in the \$230,000 range with rents averaging \$1,000. Some of the area’s newer housing is located in this area, although about 17% of housing is vacant. Nearly 30% of Oak Park households own four vehicles or more. Although an “upper middle” income neighborhood, 23% of children are living below the federal poverty line. About 40% of residents work in professional and management positions, 27% in manufacturing, and 23% in service jobs.

Physical Conditions

Housing in areas closer to downtown Tullahoma do tend to have more maintenance issues, partly because some of that housing is older and less well-built. The age of the housing stock is not surprisingly correlated somewhat with a higher need for maintenance and upgrading. While there are certainly areas with housing needs, the city does not suffer from extreme neglect. Much of the older housing, while small and in need of upgrading, is not derelict. Tullahoma doesn’t have grand historic districts full of antebellum homes and Victorian mansions, but it doesn’t have large areas of blight either (other than in isolated cases).



A more consistent theme is the presence of vacant and under-utilized lots, which present opportunities for infill and a need for design standards to guide infill development. Another issue is the lack of consistent public street infrastructure to help provide definition to neighborhoods. Many streets lack sidewalks, and there are undefined parking areas and stormwater drainage ditches in residential areas that blur the boundaries between public right-of-way and private space. These same boundaries are ill-defined in



commercial areas and are a typical legacy of an era when the city was smaller and had few resources. But as Tullahoma grows and matures, there is increasingly a need to invest in the public realm and ensure a high-quality environment.

Factors Impacting on Marketability

There are several key factors impacting on Tullahoma's marketability for housing. First, the city's location within a relatively short commute of Manchester, Shelbyville, and Murfreesboro, presents a "double-edged sword" in terms of marketing Tullahoma as a place to live. The city is convenient to jobs in these locations. But there are multiple housing opportunities in those communities that are equally if not more convenient. Convenience would not be a reason to live in Tullahoma except for proximity to Arnold Engineering Center and other major employers in Tullahoma itself. But even then, those seeing shopping and other amenities and who have the resources to commute, will gravitate to the larger urban centers like Murfreesboro and drive to Tullahoma for work.

Thus, marketing of housing in Tullahoma is very much dependent on lifestyle, schools, and amenity value. Such value is generated by "small town living" but also from high-quality and affordable housing, parks and recreation facilities, arts and culture, downtown vibrancy, and other factors. Among the most important factors is the quality of local schools, which is an area of particular pride for Tullahoma, and which must be promoted as part of housing and community marketing efforts.

Section 2. MARKET AREA DEMAND

Housing demand in the market area was forecasted based on a number of factors, including household growth by age cohort and income, housing tenure, mobility rates, commutation patterns, and job growth projections, among others. Specific demographic and lifestyle niches were identified relating to age and education levels. Each of these factors were considered for the various sub-markets including the city of Tullahoma and the commuter “ring” of communities and rural areas surrounding the city. Some of the inputs to this assessment of demand are illustrated below for the Tullahoma city component of the market area.

Market Area Definition

The Tullahoma housing market area is defined to include three sub-markets. Sub-market A comprises of Zip Code 37388, which includes the city of Tullahoma and surrounding areas. This area forms the heart of the Tullahoma market, driven by people moving up and down or moving into this market. Sub-market B consists of the “Commuter Ring” of communities surrounding Tullahoma as defined in part by the commutation patterns of those who work in the city. This area includes Winchester, but also the smaller communities near Tullahoma such as Estill Springs, Lynchburg, Decherd, Normandy, Hillsboro, Wartrace, Mulberry, Cowan, Belvidere, and rural areas in-between these towns.

Sub-market C includes the cities of Shelbyville and Manchester, and surrounding areas. Housing in these cities competes against that of Tullahoma, since both cities are located within a short drive and offer similar amenities and economic opportunities except that Manchester is located in I-24. A fair percentage of Tullahoma’s workers commute from these cities into Tullahoma for work, so they form part of Tullahoma’s potential housing market. There is also “inflow” from outside of these areas, including people moving from the Nashville area or from outside of the Middle Tennessee region from other states seeking a place for low-cost retirement or remote working.

Population and Household Trends

The market area has a total estimated population of about 136,700 people in 2021, an increase of about 22,700 or 20% since 2000. The Tullahoma area represented about 19% of this total, with a population of 26,100. More than 65,000

people are estimated to live in the Shelbyville and Manchester areas, combined. Meanwhile, the more rural “Commuter Ring” surrounding Tullahoma has an estimated 45,400 people. The Shelbyville and Manchester areas expanded the fastest between 2000 and 2021, growing by 34.5% and adding 16,750 people over the 21-year period. The Tullahoma area grew by 10.7%, adding 2,500. The outlying commuter area added 3,400 in population, for relatively slow growth of 8.2% (0.4% per year), as shown in the table below.

Table 2. POPULATION TRENDS, SELECTED SUB-MARKETS, TULLAHOMA HOUSING MARKET AREA, 2000-2021				
Area	2000	2021	2000-2021 Change	
			Number	Percent
Tullahoma Area	23,567	26,082	2,515	10.7%
Commuter Ring	41,948	45,369	3,421	8.2%
Shelby/Man	<u>48,502</u>	<u>65,250</u>	<u>16,748</u>	34.5%
TOTAL	114,017	136,701	22,684	19.9%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

There are an estimated 53,400 households in the market area, representing an increase of 9,200 or nearly 21% since 2000. The Tullahoma area has about 10,700 households and added 1,300 since 2000. The Shelbyville and Manchester areas added 6,100 households, yielding growth of 33.3% over 21 years.

Table 3. HOUSEHOLD TRENDS, SELECTED SUB-MARKETS, TULLAHOMA HOUSING MARKET AREA, 2000-2021				
Area	2000	2021	2000-2021 Change	
			Number	Percent
Tullahoma Area	9,402	10,735	1,333	14.2%
Commuter Ring	16,434	18,211	1,777	10.8%
Shelby/Man	<u>18,323</u>	<u>24,424</u>	<u>6,101</u>	33.3%
				-
TOTAL	44,159	53,370	9,211	20.9%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

Age and Housing Tenure

Age is possibly the most important determinant of housing tenure, since younger people tend to rent at much higher rates than those who are older. For example, about 81% of Tullahoma's householders aged 15 to 24 are renters, while that share falls to 59% for those aged 25 to 34, and to 47% for those householders aged 35 to 44. The 75 to 84 age cohort has the lowest share (22%) of renters in Tullahoma, but those over age 85 tend to rent at higher rates (44%) as they move into assisted living facilities or other arrangements where they are less willing or able to maintain a house. The largest age cohort overall is for those aged 55 to 64 (with about 1,440 households), but only about 32% of householders in this age cohort in the city of Tullahoma are renters. By contrast, there are only about 550 householders aged 15 to 24, and only 320 householders over the age of 85, based on American Community Survey data generated for Tullahoma in 2019. The following table summarizes these age and tenure findings.

Table 4. HOUSING TENURE BY AGE COHORT, TULLAHOMA, 2019				
Age Cohort	Renters	Owners	TOTAL	Share Rent
15-24	447	103	550	81%
25-34	629	437	1,066	59%
35-44	588	670	1,258	47%
45-54	450	881	1,331	34%
55-64	456	988	1,444	32%
65-74	371	909	1,280	29%
75-84	186	645	831	22%
85+	135	184	319	42%
TOTAL	3,262	4,817	8,079	40%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

Over the next five years, the broader Tullahoma area represented by Zip Code 37388 is expected to add about 400 to 450 households. It is anticipated that about 290 of those households will ~~choose~~ choose to own their homes, while 120 will be renters. The largest share of added households will be among those with householders in the 65 to 74 age cohort, representing “Baby Boomers” who have aged into retirement. With about 320 additional households, this group will have the greatest impact on housing choices over the next few years, much as they have throughout their lives.

Thus, demand will be driven partly by those who are retiring or recently retired. Many of these will be empty nesters with less concern about the quality of schools and similar issues, or with being located close to work. Most will choose to stay in their existing homes, although Tullahoma area renters in this age cohort are more than twice as likely to move. So,

empty nesters and other Baby Boomers will constitute an important market for both rental and for-sale housing over the next five to ten years. Household forecasts by age and tenure are summarized in the table below for the Tullahoma area.

Table 5. HOUSEHOLD FORECASTS BY AGE & TENURE, TULLAHOMA AREA, 2021-2026			
Age Cohort	Renters	Owners	Total
15-24	30	11	41
25-34	(1)	(1)	(2)
35-44	24	36	60
45-54	(15)	(35)	(50)
55-64	(35)	(115)	(150)
65-74	92	316	408
75-84	12	55	67
85+	13	21	34
TOTAL	119	289	408
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Income

Household incomes in the area have been increasing and are expected to continue increasing into the near future. Between 2000 and 2021, Tullahoma area median household incomes increased from \$36,600 to \$52,800. While the Pandemic has impacted negatively on incomes, a recovery is expected, with household incomes increasing again to \$57,300 by 2026.

Table 6. HOUSEHOLD INCOME TRENDS AND FORECASTS, MARKET AREA, 2000-2024			
Area	2000	2021	2026
Tullahoma Area	\$ 36,579	\$ 52,798	\$ 57,273
Commuters	\$ 36,698	\$ 56,203	\$ 60,942
Man/Shelby	\$ 35,877	\$ 55,831	\$ 61,385
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Tullahoma area incomes are increasing but not as quickly as in neighboring areas or in Shelbyville and Manchester. Household incomes increased by 44% in the Tullahoma area between 2000 and 2021. However, they increased by 53% in the commuter area and by 56% in Shelbyville and Manchester (combined). This trend is expected to continue.

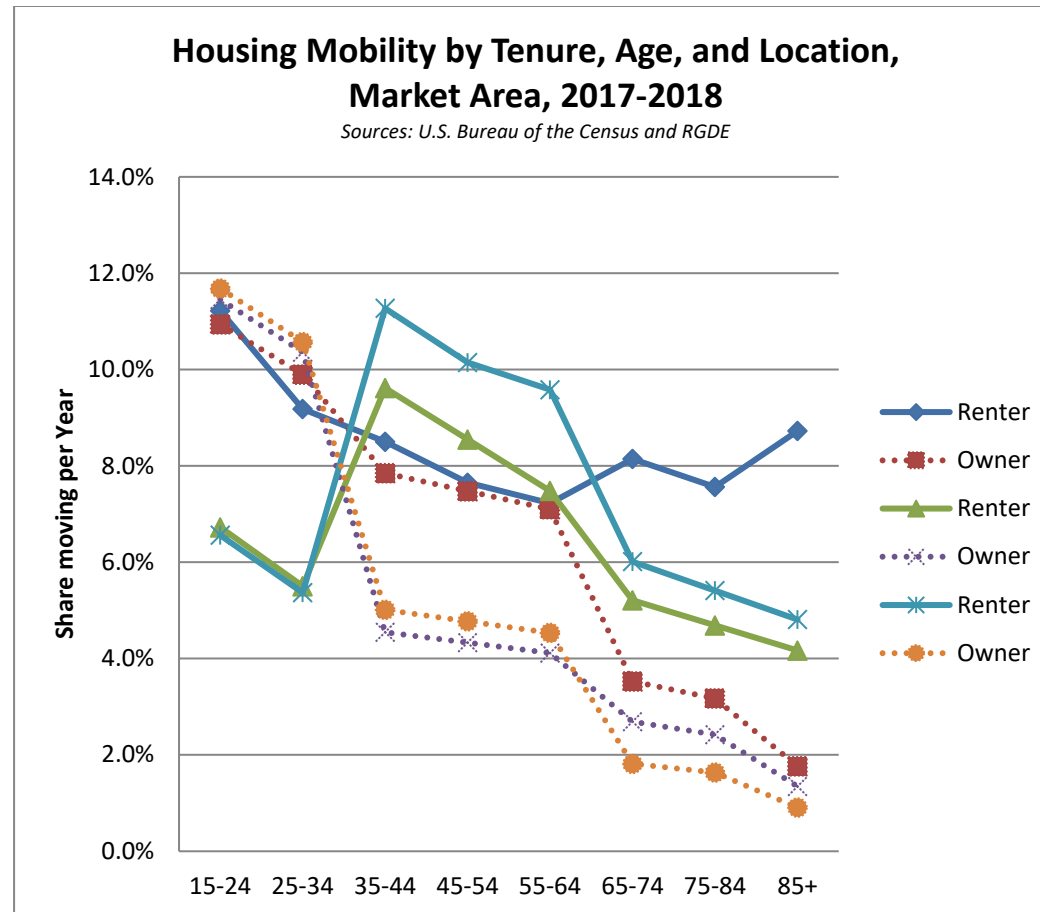
Household change was also forecasted by income cohort, which also determines how much housing households can afford to purchase. Growth will be uneven over the next five to ten years, as incomes increase with inflation and as households recover from the effects of the COVID-19 Pandemic. As households move up in income, there will be a decrease in the number of households in certain cohorts, especially those with incomes in the \$15,000 to \$25,000 range. However, there will be an increase in households with modest and high incomes. There will be significant growth in households with incomes above \$125,000.

Incomes have increased with the aging of the population, again driven by Baby Boomers. Households are forecasted by income cohort within the Tullahoma area in the following table. Similar analyses were conducted for the other portions of the market area including the Commuter Ring of Tullahoma and the Shelbyville and Manchester areas.

Table 7. HOUSEHOLD FORECASTS BY INCOME COHORT, TULLAHOMA AREA, 2021-2026			
Income Cohort	2021	2026	Change
<\$15,000	1,043	949	(94)
\$15-\$25,000	1,292	1,164	(128)
\$25-\$35,000	1,241	1,270	29
\$35-\$50,000	1,725	1,717	(8)
\$50-\$75,000	1,889	1,939	50
\$75-\$100,000	1,251	1,319	68
\$100-\$125,000	871	954	83
\$125-\$150,000	536	647	111
\$150-\$200,000	429	566	137
\$200,000+	458	618	160
TOTAL	10,735	11,143	408
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Mobility

As discussed earlier, housing mobility decreases with age as illustrated below for the Tullahoma housing market area.



The share of market area homeowners moving each year declines from about 11% among 15 to 24 year old householders to less than 1% per year for those over age 85. Mobility among Tullahoma's renter households seems to increase and peak at about 11% for those aged 35 to 44 but declines to 5% for those over age 85. Mobility is an important indicator of demand, since low mobility rates yield less demand for new housing. Detailed mobility rates by age cohort and submarket are provided in the Appendix of this report.

Section 3. TULLAHOMA MARKET POTENTIALS

The potential for housing development was determined through an analysis of Tullahoma's capture of housing demand generated in each of the sub-markets and niches in the housing market area. An assessment of Tullahoma's positioning within the competitive context helped to determine capture by age and income cohort for each sub-market. This competitive market is discussed below, followed by a summary of Tullahoma's rental and for-sale housing market potentials.

Competitive Market Context

There are only 84 homes on the market in Tullahoma out of 600 in the broader Tullahoma market area. Of those, only about 23% are homes that have been built in the last five years. New homes are available along Sears Roebuck Road or in such subdivisions as Princeton Fields and others. New development is planned along Ovoca Road including the 22-unit Pinnacle Point project.



Shelbyville has 110 homes on the market, one-third of which have been built in the last five years. Competitive subdivisions include McKeesport by Smith Douglas Homes (\$350,000 to \$430,000, 1,700-2,550 square feet), Wheatfield by Ole South Homes, The Landing at Townsend (attached townhomes by Smith Douglas, \$239,000 to \$245,000, 1,650 to 1,930sf, shown at left), Brinkley (\$310,000, 1,500sf), and others. An 8-unit townhouse-style multi-family development came online this year on South Cannon Boulevard.

Manchester has about 80 homes on the market, of which 16 (20%) were built in the last five years. Newer homes are available in subdivisions like Branson Gardens (\$475,000, 2,660sf), Richland Farms (\$360,000-\$370,000, 2,050-2,070sf), and The Barrens (\$470,000, 3,000sf). Winchester has 82 homes on the market, including 8 (10%) new construction

homes in subdivisions like Crosswinds (\$235,000-268,000, 1,270-1,450sf), Franklin Hills (\$850,000, 3,560sf), Twin Creeks Village (\$599,900-799,000, 2,650-2,800sf, shown at left), and Whispering Pines (\$563,000, 2,800sf).

Murfreesboro is a major competitor for Tullahoma's housing, as a hub of 160,000 people within the Nashville —Murfreesboro - Franklin MSA. Murfreesboro has nearly 400 current listings, of which nearly 120 or 31% were built in the last five years. Alta Vista, Kingsbury, Griffith Park, Rucker Landing, Ashton at Salem Creek, Magnolia Grove Reserve, Rivers Edge, Shelton Square, and South Haven are just a few of the many subdivisions building out with new housing. Murfreesboro is also a major hub for multi-family rental housing, with an average 400 multi-family units for rent at a given time at a broad range of price points for studio through 3-bedrooms offering various amenities.



Smaller towns like Wartrace have few new construction homes on the market. Lynchburg has new homes for sale in the Ridgeview development (\$413,000, 2000sf). Outside of the cities, there is resort housing development such as the Reserve at Holiday Landing, a 78-unit Tims Ford Lake resort home development located just south of Tullahoma.

Rental Housing Development Potentials

The market analysis accounts for the competitive context and determined that there will be potential for development of about 220 to 400 additional affordable and market rate rental units within the city of Tullahoma by 2026. This number includes up to 200 market-rate units, but only if certain conditions are met to leverage development.

To place this development potential in context, Tullahoma has seen an average of 2 units of multi-family housing permitted per year on average over the 25+-year period since 1995 (as indicated earlier) and has had only two multi-family housing projects permitted at all since 2000. The potential expressed herein therefore exceeds recent norms for construction in Tullahoma, in terms of multi-family rental housing development. Part of the reason for a dearth of multi-family construction activity was the retirement of local builders from the market and an exodus following the 2008-09 real estate recession. As a result of the low inventory, occupancy rates are high (as indicated previously) within multi-family complexes (but less so in single-family houses). Tullahoma area rents have increased markedly in recent years due to the combination of a dearth in multi-family supply and unmet demand for high-quality rental apartments.

Table 8. RENTAL HOUSING POTENTIALS, TULLAHOMA, 2021-2026			
Rent Range	Area Potentials (units)		Market Rate
	Low	Moderate	
\$ 300	27	34	-
\$ 500	27	38	-
\$ 600	37	60	
\$ 700	38	67	53
\$ 800	38	73	56
\$ 1,100	24	48	36
\$ 1,200	14	34	24
\$ 1,500	7	23	15
Sub-Total	211	378	184
<i>ELI</i>	54	72	
<i>Workforce</i>	75	127	
Job Induced	-	-	-
<i>Vacancy Factor</i>	11	19	9
TOTAL	222	397	193
Sources:	U.S. Bureau of the Census; Claritas; Woods & Poole; and Randall Gross / Development Economics.		

Unfortunately, the rising rents are pricing out a significant share of potential renters, many of whom are young workers employed in Tullahoma. About 60 to 70 units would qualify for ELI support, with another 75 to 130 or more workforce housing units at 60 to 80% of Area Median Income. Turnover at Arnold Air Force Base, ~~Vanderbilt~~ **Vanderbilt, Tullahoma-Harton Hospital** (formerly Tennova), and other local employers remain important drivers for the rental housing market. But much of the rental demand, like that of for-sale housing, is generated by local move-ups and first-time renters, local service workers, students (Motlow State Community College and UT Space Institute), and change-of-life households (recently divorced, widowed, etc.).

For-Sale Housing Development Potentials

There is also potential for some 230 to 500 units of for-sale housing development in the study area, including 290 market-rate units. This demand may exceed recent construction trends that have added an average of about 66 units per year to Tullahoma's supply of single-family housing.

Table 9. FOR-SALE HOUSING POTENTIALS, TULLAHOMA, 2021-2026			
Price Point	Area Potentials (units)		Market Rate
	Low	High	
\$ 106,250	11	14	-
\$ 156,250	60	86	-
\$ 218,750	52	130	91
\$ 247,500	15	31	23
\$ 288,750	(8)	(16)	(12)
\$ 367,500	108	269	188
Sub-Total	238	514	291
<i>ELI</i>	11	14	
Job-Induced	-	-	-
TOTAL	238	514	291
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Arnold Air Force Base and the hospital remain important demand drivers (together accounting for an estimated 7-10% of the market), but there is increasing demand generated by those relocating to the area and the state (20-25%). Nevertheless, the largest share of demand is still generated by move-ups (e.g., first-time buyers, 40-50%) and move-downs (empty nesters, 10-15%) from within the area. Roughly 10-15% of the market is comprised of investors. There is also some move-up activity from the commuter market outside of Tullahoma.

Tullahoma housing demand has increased, but supply is constrained, which helps push potential first-time and other homebuyers into secondary markets or wherever housing may come available. About 40% of market-rate housing demand will be generated for homes in the \$200,000 range, but most of what is being constructed in the area is listed at \$350,000 or higher. And this demand does not account for the need for workforce housing for purchase among those with less than 80% of the area median income (accounting for at least 20-25% of the total).

It is estimated that at least 10% of existing single-family homes in Tullahoma are in poor condition, based on field reconnaissance (identifying structural issues in foundations, roofs, walls, framing) and Census data, and there are vacant lots that could support infill development. As such, there is also the opportunity to accommodate a portion of existing homeowners who are either living in sub-standard units or will wish to age in place at accessible and affordable single-family or multi-family senior housing.

Section 4. STRATEGIC RECOMMENDATIONS

Based on the findings of the Housing Market Analyses, several marketing and development concepts have been created. This section presents several housing development concepts and opportunities for Tullahoma. Other recommendations are also made for rehabilitation, and for marketing and branding to attract investment. Finally, strategies are presented to capture funding for specific redevelopment projects and to overcome obstacles to investment. These strategies are meant to help inform other elements of the comprehensive plan for Tullahoma.

Development Concepts

Several development concepts are offered as input to the planning process and to help guide redevelopment efforts in the city. Even where the market supports them, development concepts such as these will typically require some type of public intervention or leveraging because private developers may not otherwise enter the market with these products.

Downtown Mixed-Use

There are opportunities to strengthen downtown Tullahoma through the development of apartments or mixed-use projects that enliven downtown streets and bring a “built-in” market for downtown businesses. Given the resistance of some residential neighborhoods to multi-family development, downtown provides an opportunity to integrate apartments into a commercial business hub away from single-family housing.

New mixed-use development with ground-floor retail and upper-floor rental apartments or condominiums could provide competitive new space for retail businesses while also providing a new residential product to help diversify the housing offering in Tullahoma. The housing market analysis indicated that there is potential for both condominiums and rental apartments, but it will be more challenging to obtain financing for condominiums in this market. A project with 20 to 40 rental units and ground-floor retail may be an appropriate scale as a start-up project for downtown Tullahoma. Development of an infill project could be leveraged in part with investment in a downtown public event space, restaurants, and other amenities that enhance downtown lifestyle and walkability.

In addition to new construction, there are some limited opportunities for upper-floor renovations and rehabilitation of existing buildings in the downtown area. The Veranda House Apartments has already proven at least a basic market exists for rental apartments downtown in an historic setting. These apartments rent from \$525 to \$675, so they are priced at the lower end of the market. High insurance and rehabilitation costs coupled with low rents have prohibited owners from investing in these spaces, but there may be opportunities for consolidation of spaces to help reduce the cost and increase market exposure on a marginal basis.

The City might consider facilitating partnerships between building owners and providing them with incentives to combine upper-floor spaces that may otherwise be too small or inefficient to rehabilitate on their own. Some potential incentives are described later in this section. Reconnaissance seems to indicate that there may only be a handful of these spaces with potential for rehab, but even having a few “loft” apartments in historic buildings helps to diversify the offering for housing downtown and in Tullahoma overall.

Neighborhood Infill

There are a number of vacant and under-utilized lots in the city that could, if consolidated, support neighborhood infill development of townhouses and single-family detached and “zero lot-line” housing. Some lots could support development of some of the 50 to 200+ for-sale workforce housing units for which there is forecasted demand in Tullahoma. Again, some of this housing might be clustered near commercial corridors and transportation routes. Ideally, if a public transportation system is expanded to Tullahoma, then workforce housing should be located along bus routes. But there are also opportunities for infill market-rate housing to meet some of the demand for up to 300 market-rate units over the next five years. Some opportunities for market-rate and workforce housing might be enabled through public land banking and site consolidation, as discussed later in this section.

Apartment Communities

Tullahoma has a need and a market for development of townhouse and garden-style apartment communities that offer modern amenities, contemporary design, and standards comparable to those being built in Murfreesboro and other competitive cities. Again, the market supports development of up to about 190 market-rate rental units and there is also potential for 75 to 140 workforce rental units. High design standards would be essential for promoting multi-family development in communities that are otherwise resistant. Locating such development in or near commercial corridors not

only helps avoid direct conflict with single-family neighborhoods but also provides amenity value to renters who then have direct access to goods and services. Ideally, specific locations for apartment communities would be identified through the planning process in order to help secure development opportunities against any future opposition.

Traditional Neighborhoods

The increasing incomes and affluence of residents entering the Tullahoma market indicates that demand for higher-end product will continue to grow. The market analysis suggests that there would be demand for 150 to 190 for-sale housing units priced in the \$300,000 range. However, there will continue to be unmet demand for more moderate-priced housing in the \$200,000 range, along with both market-rate and workforce rental housing. There are opportunities to accommodate a mix of housing styles, tenure, and pricing in traditional neighborhood developments (TNDs) that also help to capture regional market base.

TNDs can allow for some measure of cross-subsidy of lower-priced product, although those opportunities have become severely constrained during the COVID Pandemic due to the rising cost of materials and labor. Still, Tullahoma's relatively low land costs can help create opportunities there that may not exist elsewhere in Middle Tennessee's cities. In terms of location, the Place Types section of this plan includes a "Traditional Neighborhood - New" category with TND-type development in mind. There are several undeveloped areas that have been designated with this Place Type, located on the periphery of the community as indicated in the main body of the plan.

Marketing ^{and} Developer Recruitment

There is a need to package and promote sites for housing development within the city limits of Tullahoma to potential housing developers. Tullahoma has lost some of its local housing building industry, but the regional development community has not yet "found" the city or discovered its potential for housing development. Area builders continue to find sites for low-cost development outside of the City limits, foregoing the City's regulatory authority, while holding down costs. But there are regional and national developers active in the Murfreesboro market that are more familiar with the need for sidewalks and higher development standards. These types of developers should be targeted for recruitment to Tullahoma, rather than lowering standards to meet the nominal cost requirements of low-cost builders.

Some of these regional developers have discovered opportunities in Shelbyville or other smaller Middle Tennessee markets. Targeting outreach to these residential buildings (both rental and for-sale) should be a part of the City's economic and business development efforts. The comprehensive plan, which would be shared with potential developers, will help in that regard by establishing locations and parameters for housing development and by indicating the depth of market potential.

Funding ^{and} & Leveraging

Coupled with an effort to restrict sprawl and growth outside of the City's regulatory authority, Tullahoma can offer incentives to develop in town. As noted above, there is the opportunity to consolidate vacant and under-utilized sites in the city and to package them with public amenities like parks, high-quality schools (which is an incentive in itself), and recreation facilities. The City can accomplish this task in several different ways, such as through a "Land Bank" approach that allows the City to acquire land strategically through purchase, condemnation through codes enforcement, default, tax liens, gifting, consolidation with City land or of City agency facilities, and/or partnerships with property owners for equity investment. The City can then promote sites for master planning and development.

Whether or not the City plays a pro-active role in accumulating land, it can help *facilitate* the creation of sites for development or redevelopment such as by encouraging private property owners to form equity partnerships to consolidate vacant or underutilized parcels. The City can leverage development through technical assistance such as by funding the creation of master plans, engineering studies, or other due diligence; working on behalf of property owners to recruit developers (such as through an RFP process); improving the streetscape (e.g., underground utilities in the downtown area) and upgrading infrastructure (e.g., adding sidewalks); fast-tracking the regulatory process and reducing fees for designated sites; and creating or packaging infrastructure and grant incentives for targeted sites. Such incentives might include a PILOT (payment in-lieu of taxes) program or, for more complex mixed-use projects downtown, a TIF (tax increment financing) program. The City should also use these programs to help target and promote the inclusion of workforce housing units in new development.

Appendix

Table A-1. RESIDENTIAL BUILDING PERMIT TRENDS, TULLAHOMA, 1996-2020				
Year	SF	2-4 Unit	MF	TOTAL
1996	73	-	-	73
1997	77	-	-	77
1998	92	-	8	100
1999	66	-	-	66
2000	48	8	11	67
2001	53	4	-	57
2002	101	-	-	101
2003	99	-	-	99
2004	65	-	-	65
2005	73	-	-	73
2006	70	-	-	70
2007	58	-	-	58
2008	26	-	-	26
2009	18	-	-	18
2010	16	-	-	16
2011	16	-	-	16
2012	31	-	-	31
2013	36	-	-	36
2014	50	-	-	50
2015	57	-	-	57
2016	65	-	-	65
2017	63	-	16	79
2018	81	-	-	81
2019	71	-	-	71
2020	59	8	5	72
Total	1,464	20	40	1,524
Average	59	1	2	61
	6.5%	0.1%	0.2%	
Period	SF	2-3-4	MF	TOTAL
'96-2003	76	2	2	80
'04-2008	58	-	-	58
'09-2014	28	-	-	28
'15-2020	66	1	4	71
Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.				

Table A-2. HOUSING MOBILITY BY TENURE AND HOUSEHOLDER AGE, MARKET AREA, 2010-2014 PER YEAR						
Age Cohort	<u>Tullahoma</u>		<u>Commuters</u>		<u>Shelby/Manchester</u>	
	<u>Renter</u>	<u>Owner</u>	<u>Renter</u>	<u>Owner</u>	<u>Renter</u>	<u>Owner</u>
15-24	11.2%	10.9%	6.7%	11.5%	6.6%	11.7%
25-34	9.2%	9.9%	5.5%	10.4%	5.4%	10.6%
35-44	8.5%	7.8%	9.6%	4.5%	11.3%	5.0%
45-54	7.7%	7.5%	8.5%	4.3%	10.1%	4.8%
55-64	7.2%	7.1%	7.5%	4.1%	9.6%	4.5%
65-74	8.1%	3.5%	5.2%	2.7%	6.0%	1.8%
75-84	7.6%	3.2%	4.7%	2.4%	5.4%	1.6%
85+	8.7%	1.8%	4.2%	1.3%	4.8%	0.9%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.					

Tullahoma Comprehensive Plan

APPENDIX D.

EVENT VENUE MARKET ANALYSIS

Event Venue
MARKET ANALYSIS
Tullahoma, Tennessee

Prepared October 27, 2021
For The Walker Collaborative
And the City of Tullahoma

By Randall Gross / Development Economics

INTRODUCTION

The Event Venue Market Analysis examined the potential for Tullahoma to attract meetings and events. Analysis of the market for meetings and events focused on those activities that could be attracted to a Tullahoma site and generate revenue to the facility. The potential user groups were identified and data and information collected to help analyze the potential for meeting venues in Tullahoma. These user groups are identified below, followed by a summary of information collected from each group and findings on their potential for meeting venues.

Section 1 of this report provides an overview of existing conditions and site opportunities that provide context for an analysis of event venue potentials. In Section 2, the primary target user groups are identified and assessed, based in part on surveys, interviews, and business and demographic data generated as input to this analysis. Section 3 determines the city's potential indicative support for a meeting venue and discussed possible locations and concepts for its development.

Section 1. EXISTING CONDITIONS

An existing conditions assessment was conducted to review factors impacting on the competitiveness of Tullahoma as a location for meetings and events. The assessment also examined existing meeting and event venues in the Tullahoma area and surrounding communities to provide an understanding of the competitive context. Overall marketability is discussed in terms of location, accessibility, image, and other factors.

Location and Access

Tullahoma is centrally located in Middle Tennessee, just about one to 1.5 hour's drive from Nashville, Chattanooga, and Huntsville. The Nashville Metro Area's sprawling growth has brought suburban development ever closer but Tullahoma and nearby Manchester remain part of their own distinct "micropolitan" statistical area comprised of Coffee, Franklin, and Moore counties. Tullahoma itself sits in two counties – Franklin and Coffee – and is located just a few miles from the Moore County line. Much of the area around Tullahoma retains a rural character, although Tullahoma itself offers a more cosmopolitan feel than many small towns, thanks to the presence of Arnold Air Force Base and the Arnold Engineering Development Complex. Tullahoma, along with Manchester and Shelbyville, forms an arc of small urban centers within a short 20-minute drive of one another. The city is also home to George Dickel Distillery and located within a relatively short drive of Lynchburg (home of Jack Daniel's Distillery). As a hub on the Tennessee Whiskey Trail, Tullahoma is the largest and most accessible city near both Jack Daniel's and George Dickel. Winchester, Monteagle, and Sewanee/University of the South are also within about a 20-minute drive. Tullahoma is relatively accessible to Murfreesboro, Franklin-Cool Springs, Nashville, and Chattanooga for commuters.

While Tullahoma is centrally-located, it is not situated on an interstate highway, which reduces its exposure and lengthens commutation times. Being 15 or 20 minutes away from the interstate also reduces Tullahoma's competitiveness for large group meetings and events, which often require as a prerequisite a location with direct or nearby interstate access. Even though the city is only a short drive from I-24, it will not be perceived as being interstate accessible for marketing purposes. Thus, the lack of direct interstate highway access may prevent Tullahoma from attracting many meetings or events that would draw attendance from outside of the area. Even though Nashville International Airport is just over an hour away, the lack of a commercial airport nearby eliminates most opportunities for large meetings that might draw attendees

on a regional or national level. While not on an interstate or other limited-access highway, Tullahoma does offer fairly good north-south access via U.S. 41A and east-west access on TN 55. U.S. 41A provides direct access to Shelbyville and Winchester-Decherd. TN 55 provides access to Manchester (and from there, I-24 to Nashville-Murfreesboro and Chattanooga) and Lynchburg.

Tullahoma: Aerospace and the Whiskey Trail

Arnold Air Force Base is a world center for aerospace testing and engineering. The base has long brought (and continues to bring) transplants from across the country and the globe, adding to Tullahoma's cosmopolitan character. The presence of AEDC and major testing and research facilities helps to support opportunities for meetings associated with aerospace research and development, engineering, military contracting, training, and related activities. The University of Tennessee Space Institute (UTSI) is also located in Tullahoma, bringing world-class education and research activity that can leverage demand for meetings, networking, training, and conferences. Ultimately, the aerospace activity at Arnold AFB helps to create a strong brand for meeting and conference venues.

As noted previously, Tullahoma is also a hub for the Tennessee Whiskey Trail and is located close to several of the world's most famous beverage brands. As such, there are additional opportunities for leveraging meetings and events as part of broader marketing and branding efforts focused on these global brands. Tourism activities including distillery tours, dining, and entertainment are excellent opportunities for packaging with meeting and event venues.

Competitive Meeting and Event Venues

Tullahoma has an existing event venue, known as the South Jackson Civic Center. The venue is located in the former South Jackson School building, the city's first public school, built in 1886. The South Jackson Civic Association has managed the venue and has also served as the presenting organization and operator of a museum at the facility since 1977. The venue draws audiences from a five-county region including Coffee, Moore, Franklin, Bedford, and Warren, according to the organization's web site. The facility includes a 400-seat auditorium with proscenium stage, along with rehearsal space, meeting rooms, and the local history museum. While the facility offers a variety of programming and accommodates performances in its traditional auditorium, the facility was not purpose-built as a performing arts venue or as a meeting and conference center. In particular, the facility, while an important resource for the community, lacks modern

meeting technology and purpose-built spaces to accommodate concurrent sessions, group business meetings, trade shows, and conferences.

While there is a lack of purpose-built meeting and event venues in Tullahoma, such venues do exist in the broader region. In addition, there are smaller event venues in Tullahoma itself and there would be a need to ensure that the market for any existing venues is not compromised by the addition of new facilities. A sample of competitive venues in the region include the following meeting and conference centers, hotels, wedding venues, and others.

- **Holiday Inn Express & Suites, Tullahoma.** Local hotel off of Highway 41 with one 1,200 square foot meeting room (“The Tullahoma Room”). Has capacity for 75 (theatre style), 50 (banquet), and 30 (conference).
- **Manchester-Coffee County Conference Center, Manchester.** Largest meeting and conference center located between Murfreesboro and Chattanooga, and the primary competitor for large events in the area. Part of a 13,000 square-foot complex that includes 80 lodging rooms at the 2-star Holiday Inn Express & Suites-Manchester. Total capacity for 1,100, including the Tennessee Ballroom (500), Grand Salon (225, divisible), Bonnaroo Lodge outdoor venue, and meeting rooms (32 and 18, respectively). Prices start at \$1,500 per event.
- **Rock Creek Springs Wedding Venue, Tullahoma** (Estill Springs). A small wedding venue located off of SR 130 in the Estill Springs area, has capacity for 30. Rates range from \$625 to \$875 per event.
- **Monterey Station, Cowan.** This facility located in Downtown Cowan (20 miles from Tullahoma, southeast of Winchester) offers a small town downtown environment for weddings, business events, conferences, theatre, and other functions. Doubles as the local “Center for the Arts.” Capacity for 1,000+. Outside catering is allowed.
- **Raffin’s Wedding & Event Barn, Hillsboro.** A full-service wedding venue located about 14 miles from Tullahoma. Has capacity for 200 inside along with 65 acres of outdoor event space.
- **Bell Buckle Banquet Hall, Bell Buckle.** This “rustic” event venue caters to weddings, conferences and special events. Facilities include a banquet room (capacity 250) and outdoor venue. Catering is provided by the Bell Buckle café and prices average \$6,900 per event inclusive.
- **Microtel Inn & Suites by Wyndom, Shelbyville.** This budget hotel offers a 400 square foot meeting room with capacity for 40,

conference or banquet style.

- **Circle E Guest Ranch, Belvidere.** Lodge offering space for weddings and receptions, located about 20 miles from Tullahoma. Capacity for 250, with prices starting at \$1,200 inclusive. Facilities include a lodge, amphitheater, and outdoor grounds.
- **Eddie's Retreat, Noah/Beechgrove.** Banquet/entertainment hall in rustic barn setting that can accommodate weddings, events, and concerts. Capacity for 110, with prices ranging from \$2,600 to \$3,300 per event. Located about 22 miles from Tullahoma.
- **Murfreesboro.** There are dozens of competitive event spaces in Murfreesboro. Reconnaissance inventoried at least 14 venues, with total capacity in the 1,000s. However, there were few individual event spaces with capacity of more than 300, even in a market this large. Among the largest is the Embassy Suites Hotel, with capacity for 3,800. Large venues are also available in the other major urban centers in the region, with the closest convention center in Huntsville (Von Braun, capacity 10,080).

Meeting ^{and} & Event Visitor Assets

In addition to Arnold AFB and the distilleries, the Tullahoma area offers other marketing assets that help to enhance it's competitiveness for attracting meetings and events. Tullahoma has a small but attractive downtown that offers potential for restoration and redevelopment, including proposals for creation of a new outdoor public space for events and performances. An outdoor event space would add significantly to the marketing potential for indoor spaces, especially if they could be coupled and packaged together. Successful operation of an outdoor venue could also help increase investment interest in an indoor component.

Tullahoma also offers access to stunning lakes and natural areas. Lake Normandy is located right on the city's doorstep and offers miles of relatively undisturbed shoreline. Short Springs Natural Area is also located nearby. Tims Ford State Park offers amenities and services in a beautiful natural setting, although the lake is not technically located within the city limits of Tullahoma. The Beechcraft Heritage Museum provides another strong link to Tullahoma's aeronautical heritage and current positioning for aviation testing and research. The Tullahoma Arts Center provides access to locally produced art. The Hands On Science Center offers activities for youth and access to one of the few natural history centers in the region. Lakewood Golf & Country Club provides 18 holes in a high-quality golf environment near Lake Normandy. The city also has several lodging facilities that can help support meeting and conference attendance, such as the Quality Inn, Hampton Inn Tullahoma, Holiday Inn Express & Suites Tullahoma, The Grand Lux Inn, and Baymont by Wyndham

Tullahoma. The Ledford Mill B&B and other local establishments offer rooms in quaint historic settings.

Physical Conditions ^{and} Sites

Ideally, meeting and event centers are located near the heart of the city, in the downtown core. At that location, the economic benefits from a meeting center are magnified through spin-off to local businesses including restaurants and drinking places, retail shops, banks, personal service establishments, entertainment venues, cultural and non-profit facilities, and others. Competitive sites for meeting centers can also include resort locations, such as on water (lakes, rivers, seafront), mountains and parks, or golf and recreation areas. In some cases, competitive locations are also those that have the highest exposure, such as along an interstate highway or adjacent to a major resort (e.g., Opryland or Disney), or airport. In Tullahoma, the most competitive locations are likely to be either downtown or near Lake Normandy or Short Springs, which offer attractive natural settings. The downtown area would need reinvestment in its public streetscape and public spaces, as well as in private assets like restaurants, pubs, and accommodation services, in order to support the meeting market. This market analysis has assumed that such reinvestment would occur in advance of the creation of a meeting or event venue downtown.

Section 2. POTENTIAL USER GROUPS

The primary user groups identified for a meeting venue in Tullahoma include non-profit associations ^{and} ~~&~~ organizations, state government agencies ^{and} ~~&~~ the U.S. Department of Defense, colleges ^{and} ~~&~~ universities, local-area businesses, and wedding ^{and} ~~&~~ event planners. Research was conducted to identify several hundred entities most likely to use meeting space in southern Middle Tennessee. An online survey instrument was then designed and targeted specifically to these user groups. More than 100 individuals and their contacts were identified at each of the entities for receipt of the link to the survey. The Tullahoma Area Chamber of Commerce has also distributed the link to its members. The surveys were uploaded via SurkeyMonkey.com. Some follow-up phone interviews were held with individual representatives at selected entities.

Data from the surveys and interviews was used to determine interest in use of the facility but also to calculate a “propensity” rate at which associations, government agencies, and businesses would utilize the facilities. Corporate potentials were based partly on the surveys but also on regional business patterns and growth rates. A completely separate approach focused on detailed input from wedding planners coupled with area demographics was used to assess wedding potentials. Finally, some research was conducted on existing facilities with respect to current event use in the area.

Associations ^{and} ~~&~~ Organizations

Nonprofit associations and organizations are an important market segment for Tullahoma as interviews have identified a need among local organizations for meeting space. Some locally-based organizations must leave the community in order to conduct their larger meetings and events that cannot be accommodated in town. There are also organizations in a broader market encompassing Coffee County, Franklin County, and neighboring areas that could rotate meetings to Tullahoma if space were available. Finally, there are state and regional organizations that also rotate to different locations around Tennessee and could consider using facilities in Tullahoma as part of their rotations.

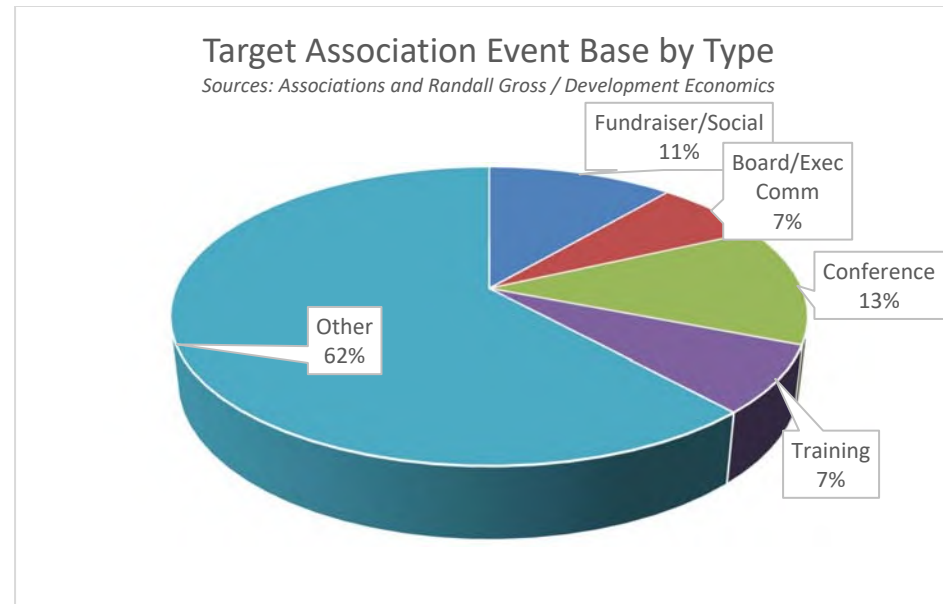
Segments

Over 100 non-profit associations and organizations were identified and targeted through the online survey and follow-up interviews. The key segments targeted Tullahoma include:

- Local civic and community organizations
- Local and state military and Veterans organizations
- Aerospace organizations
- Middle Tennessee and state industry associations
- Middle Tennessee and state environmental associations
- Local and State government employee associations
- Distillery and beverage associations
- Professional and employee-based associations
- Advocacy organizations

Event Base

Research and survey results indicate a total association annual event base of up to 780. This number excludes some smaller events that tend to be held on a local chapter basis. Research results and comparable analysis suggest that about 13% of association events are conferences, including those sponsored by the organization itself or in collaboration with partner groups. There are also trade shows and topical meetings included in this category. Another 11% are fundraisers and social events, such as award dinners and networking functions. About 7% are in board meetings or meetings of executive committees, advisory councils, and similar functions. Another 7% are in training and workshops sponsored for members, constituents, or communities. The largest category of association events, “Other” includes a broad spectrum of activities including hearings, press conferences, rallies, actions, protests, town halls, expos, festivals, celebrations, retreats, lectures, luncheons, exhibitions, and screenings, among others. The following chart summarizes the various categories of meetings and events sponsored by associations and nonprofit organizations.



Meeting Characteristics

Specific data was collected on the characteristics of meetings and events held by various associations and organizations. This information informs the assessment of Tullahoma's competitiveness in the market and its potential for capturing association events.

Attendance. Attendance varies significantly by organization and type of event. In general, however, conferences and community events attract the largest numbers of attendees, followed by fundraisers & social events, training, and board or committee meetings. Average attendance is summarized below.

- Fundraisers/Social Events 65
- Membership 15
- Board/Committee 25

◦ Conference	325
◦ Training	65
◦ Other	295

Duration. The length (in days) of events impacts on the demand for lodging rooms and services associated with the event. If new hotel rooms are added nearby, the Tullahoma will be able to accommodate multi-day events, and the utilization rate (and therefore the economic viability) of the venue is increased. Typical days required for each type of event are summarized below.

◦ Fundraiser/Social Events	1.0
◦ Board/Committee	1.5
◦ Conference	2.5
◦ Training	1.3
◦ Other	1.0

Location Preferences

Several recurring factors impacting on location preference were identified among the target group of associations and organizations. One important factor is whether the site is located near restaurants, drinking places, and entertainment, which provide amenity value for various types of meetings, especially those that bring visitors from outside of the immediate area. A lakeside location was also appealing for certain types of meetings (board retreat, for example). Organizations often prefer a site that is accessible to their membership or constituent base, or within less than a day's drive of the site.

Organizations are also looking for locations that provide cost-effective services, lodging (especially for conferences and annual meetings), and rental charges. Some organizations require at least a few lodging rooms for board meetings and training sessions. Lodging requirements vary significantly between organizations and events, but cost-effectiveness is important to a majority of nonprofits that run fairly tight budgets. Because of cost constraints, many nonprofit organizations operate their own in-house venues or use their own offices for board and other meetings and events. Other organizations often make use of free facilities, public parks, and open spaces to host rallies and other events.

Competitive Framework

There are several local venues in Tullahoma that have been used for meetings in the past, such as South Jackson Civic Center and Motlow House (now closed). Local groups have invariably held larger meetings out of town, such as at the Manchester-Coffee County Conference Center. Among the venues identified and used by targeted associations and nonprofit organizations for their meetings and events were the following:

Westin-Chattanooga, Hampton Inn Tullahoma, Manchester-Coffee County Conference Center, Embassy Suites by Hilton-Murfreesboro, Park Vista-Gatlinburg, Lakewood Golf & Country Club, Franklin Marriott-Cool Springs, Sheraton Music City, DoubleTree by Hilton Murfreesboro, Opryland Resort & Conference Center, The Honeysuckle at Twin Creeks (Winchester), Middle Tennessee State University, Holiday Inn Express & Suites Manchester, Grand Hyatt Nashville, Shelbyville Central High School Auditorium, The Hermitage Hotel, Montgomery Bell State Park, Sewanee Inn, Embassy Suites-Knoxville, Hilton Franklin-Cool Springs, Music City Center.

Likely Users

Certain characteristics were shared by those one-third of organizations that appeared most likely to consider Tullahoma as a site for their meetings and events. Many are local groups that need space for large annual meetings and events that are currently not accommodated in town. Some of the statewide organizations shared a preference for sites that are centrally located and cost-effective, especially when they are rotating on a typical west-central-east cycle. Many of the organizations inclined to consider Tullahoma have membership in south-central Middle Tennessee or concentrated in both Nashville and Chattanooga.

Tullahoma is most likely to attract the annual meetings and large events (e.g., 300+) held by a handful of local organizations or by some others located in the Coffee-Franklin area. Otherwise, the city is likely to attract local or state rotating board or committee meetings with attendance between 10 and 40, and training session attendance averaging 20. Statewide organizations that would consider Tullahoma have designated venue budgets and typically rotate sites throughout the state, including in rural areas and small towns. The organizations have budgets that vary widely (from \$15 to \$500 per head), which suggests a need for flexibility in offering, pricing, and amenities. Similarly, the groups vary in terms of their need for lodging and catering, depending on budget, format, and other factors. There were also partnering opportunities identified for an event venue in Tullahoma to build relationships with organizations like **AEDC** and **Jack Daniel's Distillery** to help sponsor events that would bring in larger groups on a regular basis.

Utilization

Non-local associations and organizations that would consider Tullahoma as a site for their events identified some potential for accommodating board, council, and committee meetings. As noted earlier, there was also the opportunity identified for hosting training sessions and contracting or other workshops. Other uses identified by likely users included whiskey tours, dinners, and lecture-tours.

Challenges

There were various reasons why Tullahoma was not a viable location for many association meetings. Often, these challenges relate to factors having nothing to do with Tullahoma itself, but to policies and facilities controlled by the organization. For example, those groups that maintain their own meeting venue are bound to use those in-house facilities rather than budgeting for off-site venues. Access is a serious obstacle, since Tullahoma is not located on an interstate highway and, while the city is centrally located in Tennessee, it is otherwise “off the beaten track.” That being said, Tullahoma is located near the heart of the whiskey trail, so there are opportunities to package a meeting venue with off-site tour opportunities in the area. Adjacent access to hotel accommodations was critical for conferences and some other meetings, and Tullahoma currently lacks high-quality hotel accommodations in the downtown area or in other potential meeting venue locations such as along Normandy Lake. A proposed 90-room highway-oriented hotel in northern Tullahoma is unlikely to fill the gap if not of a high standard and located adjacent to a meeting facility.

Some organizations indicate a preference for metro-area locations, especially those that are not too isolated from constituencies or members. Tullahoma is just too far from the center of State Government, counteracting the advantage of being within an hour’s drive or so of Nashville. There are also groups that prefer certain site-specific activities or resort locations that offer golf and/or beach amenities. Some organizations land at corporate chains or branded venues rather than in civic meeting venues. By the same token, some organizations events are held at parks and public spaces, public buildings, and other locations that offer free access and exposure within the community. Cost was noted as a factor impacting on site location decisions among many types of organizations, but the definition of “cost-effective” differed significantly by group. As noted earlier, the range of \$15 to \$500+ per head is so broad as to incorporate many different types of venues and packages.

Government Agencies

Various government agencies may consider Tullahoma as a site for meetings or events. This analysis has obviously focused on agencies within the Government of the State of Tennessee, since Tullahoma is located in the state within a short drive of the State Capital and headquarters to most State agencies. Thus, Tullahoma offers proximity that helps make a prospective meeting facility more competitive vis-à-vis venues in other parts of the state. Also considered were several federal agencies such as the Tennessee Valley Authority, the U. S. Department of Agriculture, and the U.S. Department of Defense.

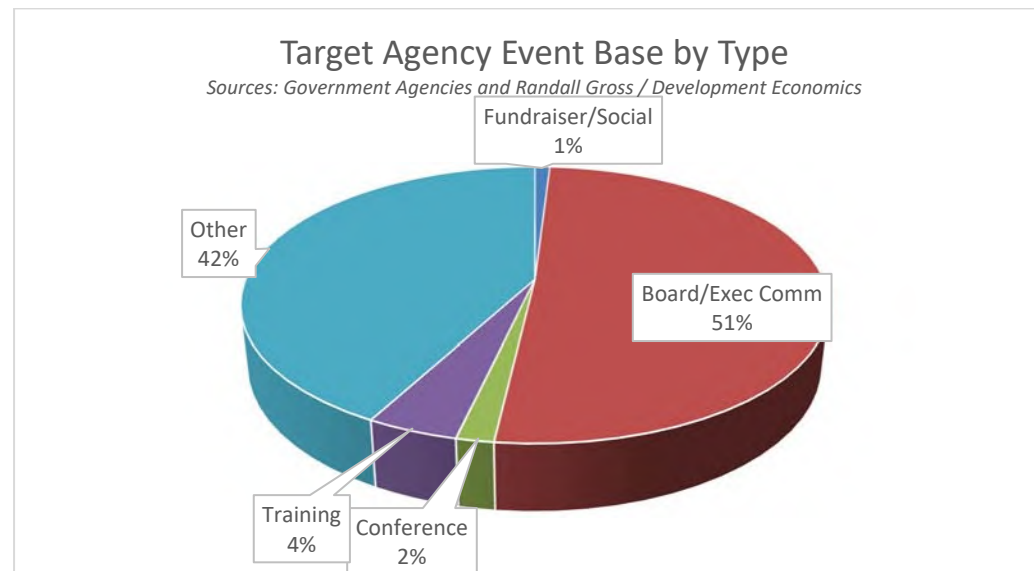
Segments ^{and} & Sample Groups

More than 30 state, regional, ^{and} & federal government agencies were identified and targeted for input through an online survey conducted via SurveyMonkey, and with follow-up via interviews. Among the targeted agencies were the following:

- U.S. Department of Agriculture-Rural Development
- TN Department of Transportation (TDOT)
- TN Department of Agriculture
- Tullahoma Airport Authority
- Arnold Engineering Development Complex (AEDC)
- Franklin County Industrial Development Board
- City of Tullahoma
- TN Housing Development Agency
- U.S. Department of Defense (DOD)
- Tennessee Valley Authority (TVA)
- TN Department of Human Services (DHS)
- South Central Tennessee Development District
- TN Department of Environment & Conservation (TDEC)
- National Aeronautics ^{and} & Space Administration (NASA)
- TN Department of Education
- TN Department of Labor & Workforce Development

Event Base

These +/-30 agencies generate a total base of at least 370 annual events. Such events include board or other executive meetings such as boards of governor, advisory councils, commissions, division and agency boards, and others. They also sponsor training sessions and workshops, conferences, social events and awards banquets, and other events including celebrations, ceremonies, public meetings, open houses, confirmation sessions, accreditation sessions, work group meetings, planning sessions, and others.



Meeting Characteristics

Data and information was collected from agencies on the attendance, source of attendance, duration, location and other characteristics of their meetings and events as follows.

Attendance. The government agencies report attendance patterns at their events that are similar to those for

nonprofit associations and organizations. Specifically, the highest attendance is generated for conferences, while board and committee meetings generate the lowest attendance.

◦ Fundraisers/Social Events	100
◦ Board/Committee	30
◦ Conference	550
◦ Training	70
◦ Other	90

Duration. The length of time (in days) required for each type of agency event is summarized below.

◦ Fundraiser/Social Events	1.0
◦ Board/Committee	2.3
◦ Conference	2.0
◦ Training	1.0
◦ Other	1.0

Location Preferences

Government agencies are bound by strict per diem travel and budget requirements. As a result, most agency meetings are held at State or local government offices or facilities. The meeting locations tend to rotate around the state or otherwise gravitate to Nashville. When meetings are held outside of Nashville, it is often a priority to be accessible to the agency's constituent base. Budgets typically require cost-effectiveness, although lodging varies significantly and there is surprising use of high-end hotel facilities for some executive level and other meetings.

Competitive Framework

As noted above, many agencies hold meetings at local and state department headquarters and other government offices and venues. In Nashville, a large number of meetings are held in the State Capitol complex. Local schools, community centers, senior centers, houses of worship, public parks, and veterans' facilities are often used as the site for meetings, especially in constituent-driven service agencies. But also, as noted, a number of meetings are held at high-end

branded hotels and resorts.

Likely Users

Among those agencies that do hold off-site meetings and events outside of government facilities or resort venues, the most likely candidates for Tullahoma include those that (like associations) have local constituencies or geographic divisions that include Tullahoma. Those agencies that are headquartered and typically have their board meetings offsite in the Nashville area are also a prime target. The board meetings that have attendance of between 30 and 50 are most likely to be attracted. While many government agencies hold training sessions and workshops at their headquarters or local offices, there are some non-constituent oriented training and workshop events (such as specialized in-house staff training) that could be attracted to Tullahoma. Those agencies with budgets for travel and per diems would be prioritized.

Utilization

The specific uses identified for this user group include commission and geographic division meetings, advisory committee and council meetings, internal or specialized training sessions and workshops, and (lakeside) retreats.

Challenges

A primary challenge for attracting government agency meetings is the use of government facilities, headquarters, and venues in Nashville or elsewhere for that purpose. Similarly, many local or regional events are held at community parks, public spaces, and other community facilities. As with associations, there is some preference for in-town and metropolitan area locations, and Tullahoma's relative distance from the State Capitol and government offices (versus Nashville and its suburbs) is problematic for some State agencies. Many government agencies are service-oriented and must engage with stakeholders, so Tullahoma could be an attractive location if there are substantial constituencies and service populations in the area for a particular agency. In some cases, agencies hold contracts for lodging and meeting services with corporate and branded entities, so independent or City-owned meeting venues may not always qualify. Some State government agencies might perceive a conflict with the nearby Manchester-Coffee County Conference Center and avoid both facilities altogether.

Institutions and Other Organizations

Institutions and other organizations present opportunities for use of an event center. If the City or the center build strong relationships with institutions like Motlow State Community College (Moore County) and the U.T. Space Institute, then there may be opportunities for broader market development.

Event Base ^{and} Characteristics

Since neither of the two main higher education institutions near Tullahoma constitutes the main campus of a four-year university, sponsored events are relatively limited. An inventory of relevant non-athletic events identified only a handful among the area's key institutions. These events include a few cultural events, competitions, and social events.

Location Preferences

Based on broad research of non-athletic institutional events, RGDE has determined that on average, a total of 82.3% of all institutional events are held on-campus or on-site and **only 17.7%** are held at off-campus facilities. Even board meetings are often held on-campus, although there are opportunities for accommodating retreats and other overnight meeting events held in a quiet setting away from institutions. Research-oriented off-campus events are sometimes held at parks and natural areas. Thus, the share of institutional events that could be held in an indoor facility off-campus is typically very small.

Likely Uses

Conferences, lectures, or colloquia that are co-sponsored by agencies and institutions, such as AEDC and UTSI, for example, might be the type of use most likely to gravitate to a meeting venue in town. There may be opportunities for enhancing both MSCC's and UTSI's overall exposure through more programmed events drawing a broader regional audience.

Challenges

Aside from the fact that relatively few institutional meetings are held off-campus, there is the fact that Tullahoma's

institution base is somewhat limited, having no main university campus or other large institution to drive a meeting and event market in town. On the other hand, UTISI does have a research component that could generate interest in the field and among the general public

Corporate

The opportunities for corporate meetings and events was also examined as part of this analysis. The surveys and follow-up interviews helped collect some basic information on corporate meeting patterns in the area. However, the methodology for assessing corporate demand then applied the basic patterns to broader industry growth projections to arrive at a sense of scale.

and Segments & Sample Groups

For the purposes of this business plan, a first-phase approach focused on the local Coffee-Franklin county business base was prioritized. Over the longer term, it may very well be possible for Tullahoma to attract corporate retreats or board meetings from other parts of Middle Tennessee and beyond. In some cases, it may be very advantageous to co-brand the venue for corporate use with programming associated with AEDC, Jack Daniel's Distillery, or the U.T. Space Institute. Such branding would set the facility apart from other venues in the region.

Local Tullahoma-Area Companies Targeted. The larger local corporate employers were targeted through the surveys, particularly those that have headquarters or major operations in Tullahoma or in Coffee or Franklin counties. The Tullahoma Area Chamber of Commerce assisted in distributing the survey link to its members. Key employers included the following, among others:

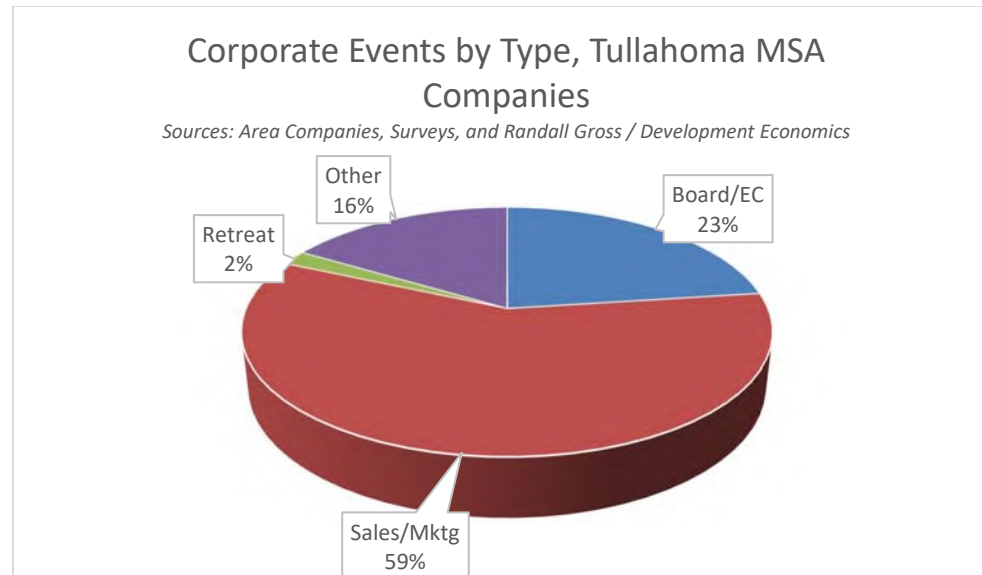
- George Dickel Distillery
- Jacob's Engineering
- Ascend Federal Credit Union
- ~~Vanderbilt Tullahoma-Harton Hospital~~
- ~~Vanderbilt~~ (Tennova) Medical Center
- National Aerospace Solutions (NAS)
- Tullahoma Industries
- Jack Daniel's Distillery

Other Tullahoma-Area Employers. A sample of other employers of all sizes was also surveyed, including the following.

- Citizens Tri-County Bank
- Clayton's
- Woodard's Jewelry
- Weichert Realty
- London's
- ~~Micro Craft~~
- ~~Microcraft~~
- Trader's National Bank
- JSP International
- Batesville Caskets
- Schmeide Corporation
- Wisco Envelopes
- United Technologies Aerospace Systems, etc.

Event Base

The events base was estimated based on survey responses and input from venue operators, coupled with data on the business base. There are a total of about 350 estimated corporate meetings held by 128 businesses with over 50 employees located in the Tullahoma Micropolitan Statistical Area each year (outside of the impacts of the COVID Pandemic). This number does not include meetings or events held by smaller companies, although the small businesses tend to conduct their meetings in-house as they often do not have the resources, volumes, or time to hire meeting venues except for occasional special events (launch of a new product, holiday party, etc.).



This inventory includes about 75 board or executive committee meetings, 215 sales/training and marketing meetings, 3 retreats, and 60 other events such as parties, dinners and other social events outside of the regular meetings, conferences or events held in-house. The largest corporations listed above account for about half of these meetings while other companies with over 50 employees account for the others.

Meeting Characteristics

Most of the local corporate meetings have a duration of only a few hours or one full day at most. In some cases, there are overnight retreats, training workshops, and sales meetings that require overnight accommodations.

Location Preferences

The locally-based companies typically use in-house or local Tullahoma-Shelbyville-Manchester area venues for their meetings but they will also plan board meetings and retreats in Nashville or other parts of the state or region. Golf resort areas are popular among a few of the larger companies.

Competitive Framework

Corporate users utilize a variety of venues for annual meetings, board and committee meetings, sales and training meetings, dinners, teambuilding, and social events. The most commonly used venues that would compete for corporate meetings include branded hotels in Nashville and Cool Springs but also resorts throughout the southeast and nationally). Many corporations also use on-site facilities for certain types of meetings.

Likely Uses

Tullahoma can attract some board and executive committee meetings (or lakeside) retreats, based on responses from a small sample of local companies and on experience in other markets. There may also be opportunities for training or sales meetings with teams from other parts of Middle Tennessee or the region.

Challenges

There is significant competition for the corporate market, with plenty of venues that can accommodate such meetings closer into metropolitan areas including Nashville. The larger corporate users can travel extensively, so Tullahoma must compete not only with Nashville or Chattanooga but also with Fort Lauderdale, Charleston, and other locations. In order to compete, Tullahoma would need to offer a unique package that perhaps includes a waterfront setting, golf package, or a co-branding experience such as with George Dickel or Jack Daniel's that is unique to the city. Without high-amenity lodging rooms associated with a meeting venue, it will be difficult to capture a significant share of the corporate market except for local events, training, or sales meetings.

Weddings ^{and} Social Events

^{and}
The wedding & event market was considered as a potential use for the facility partly to help fill gaps in the operating sustainability of a Tullahoma venue. The wedding/reception market base was estimated based on a variety of inputs including discussions with regional wedding and event planners, coupled with demographic analysis and forecasts for the Tullahoma/Coffee County area market. The existing supply of wedding and event venues was also inventoried and, while there is some overlap with other meeting facilities in the region, there are a number of venues that focus solely on accommodating wedding-related events.

Market Base

Based on public records and demographic analysis, it is estimated that there are approximately 370 wedding events held in Tullahoma/Coffee County each year. Unlike other markets around Nashville, a relatively small share of Tullahoma area weddings are arranged through wedding planners.

Event Characteristics

The relatively small number of wedding planners in this market may be associated with the fact that the Tullahoma wedding market is dominated by local couples, with limited destination draw. The Nashville area has become the region's destination market for out-of-town couples drawn to the area for its urban excitement, live music, scenery, venues, and other amenities.

The average size of luxury and mid-range weddings in the region is estimated at 110 to 130 guests, with seating capacity for up to 150 typically required. In addition to weddings, a venue could accommodate receptions and related events. Depending on the location, a rural or lakeside setting can attract outdoor events through use of the landscaping and formal gardens, topography, lakes, and farm buildings.

Competitive Framework

There are a number of competitive wedding venues in the region, including historic homes and gardens, properties, and natural areas. Many of these sites are located closer into Nashville and do not require a transportation system to ferry

non-driving guests to a remote site.

Likely Users

The most likely wedding parties attracted to a venue in Tullahoma would be those seeking the historic ambiance of a small town downtown, or a natural environment of a lakefront or other rural site. Again, co-branding of a venue with one of the world-famous distilleries in the area could certainly raise the profile and set it apart from the “typical” small town municipal meeting venue. Having outdoor space to accommodate wedding ceremonies or receptions would also be an attractive element, even if located in the downtown area. The target market will include primarily local weddings but there is the opportunity for “inflow” of those looking for a small-town ambiance, especially if associated with Tennessee’s distillery culture.

Challenges

Tullahoma has constraints for hosting out-of-town wedding parties due to the lack of accommodation. The city is relatively far from class A hotels in the Nashville-Franklin-Murfreesboro market. Tullahoma also does not yet have the reputation of other Middle Tennessee communities for an historic downtown ambiance. However, it is located near several stunning lakes that offer multiple opportunities to create a unique natural setting in support of weddings and other events.

Section 3. TULLAHOMA EVENT VENUE POTENTIALS

This section determines and forecasts potential venue utilization for meetings and events. The city's competitive positioning and capture within the market for each type of event was determined, with the event venue's utilization forecasted as a basis for strategic recommendations on sites, marketing, and development.

Propensity-Based Site Potentials

The potential for Tullahoma to capture some of the target market demand for meetings and events generated by associations and organizations, government agencies, and institutions was calculated based on the *propensities* of sampled organizations to consider Tullahoma as a location for their events. This analysis determined that there is potential for Tullahoma to capture about 60 association meetings and events per year, but only 3 to 5 meetings held by government entities, and 2 or 3 sponsored by institutions and others, for a total of about 65 to 70 meetings per year. The meeting potentials are distributed by type of entity and type of event, below.

Table 1. ASSOCIATION & GOVERNMENT MEETING POTENTIALS, TULLAHOMA, 2026				
Type of Event	Associations/Orgs	Govt	Inst./Other	TOTAL
Fundraiser/Social	26	-	-	26
Board/Exec Comm	17	1	-	18
Conference	1	-	2	4
Training	7	1	-	8
Other	8	0	-	8
TOTAL	59	3	2	64
Sources:	Associations and Randall Gross / Development Economics.			

Utilization would include about 30 fundraisers and social events, 16 to 22 board or executive committee meetings, 3

to 5 conferences, 8 to 16 training sessions or workshops, and 6 to 15 other types of meetings.

Corporate Meeting Potentials

As noted earlier, the potential for corporate meetings was determined based in part on corporate meeting schedules but also on economic projections of growth in associated industries. The overall market base for corporate meetings totaled about 350, as discussed previously. Tullahoma has potential to capture about 50 to 60 of these meetings per year, under the right circumstances.

Table 2. TULLAHOMA CORPORATE MARKET MEETING POTENTIALS, 2026			
Type	Meetings	Attendance	Share
Board/Exec	12	161	14%
Sales/Mktg	35	850	72%
Retreat	0	2	0%
Other	10	161	14%
TOTAL	57	1,175	100%
Sources:	U.S. Bureau of the Census, Business Survey, and RGDE.		

A Tullahoma meeting and event venue would capture about 12 to 15 board and executive-level meetings, 30 to 50 sales and marketing meetings, 1 or 2 retreats, and 10 to 18 other meetings and events per year. The majority of these functions would be generated by mid-size corporate organizations in town, since these are most likely to conduct such meetings but lack in-house spaces or funds for branded resort locations to accommodate them. Tullahoma is most likely to capture these events if the venue is associated with some lodging rooms, amenities (such as lake, golf resort, or downtown

dining), and branded partnerships with a known aerospace-centric entity such as AEDC or UTSI, or with a lifestyle brand like Jack Daniel's or George Dickel.

Weddings ^{and} Events

Tullahoma could capture an estimated 7 to 12 weddings, receptions, and other non-corporate social events per year. As noted earlier, the market supports an average of about 370 weddings per year.

Table 3. WEDDING EVENT MARKET POTENTIAL, TULLAHOMA	
Factor	Number
# Weddings	371
Urban/Venue	46
Event Potential	7
Attendance	729
Sources:	Wedding planners, Comparable Facilities, US Bureau of the Census, Randall Gross / Development Economics.

Of this number, about 45 to 50 will select wedding venues other than historic houses, barns, churches, parks, and other facilities to accommodate their needs. Co-branding the venue, as discussed above, would have a similar leveraging effect with the wedding market. However, the venue would still have to compete with dozens of such properties within this niche.

Summary of User Group Potentials

Based on the various user group analyses, a Tullahoma meeting and event venue should be able to capture a target of about 120 to 150 events per year. Capacity for events accommodating at least 500 people would be required, suggesting a footprint of at least 6,000 to 8,000 square feet of indoor space, flexible and divisible. These events could include the following. These numbers represent the total market potentials at full operation (within three to five years of initial marketing), **not** necessarily the recommended use of the facility:

Associations & Nonprofit Organizations	65 – 70
Weddings and Events	10 – 12
Corporate	50 – 60
Government Agencies	3 – 5
University/Research Institutions	2 – 3
TOTAL	120 – 150

The target potential event schedule was also disaggregated by type of event, with fundraisers, social events, and sales meetings generating the largest number of events, followed by board ^{and} annual meetings, training sessions ^{and} workshops, and other meetings ^{and} events. There would also be several wedding-related events as well as conferences and workshops each year.

Board/Exec/Annual Meetings and Retreats	28 – 29
Weddings & Events	7 – 10
Conferences, Workgroups & Colloquia	3 – 4
Fundraisers/Social Events	30 – 40
Other Meetings & Events	10 – 12
Training Sessions and Workshops	12 – 20
Sales & Marketing Meetings	30 – 35
TOTAL	120 – 150

Strategic Inputs

There are a number of factors impacting on the ability of Tullahoma to achieve these target potentials. Several strategic recommendations are made below to help address these factors and also to maximize the city's potential for capturing the meeting and event market.

Size and Location

A meeting and event facility would need to offer sufficient space as well as flexibility to accommodate a diverse set of small and large events. The market analysis indicates potential for capturing events with attendance ranging from 10 to 300 or more. With 150 events and 200-250 event days per year (50%+ utilization), it is likely that this event center will need to accommodate other uses in order to remain operationally and financially viable. Thus, a flexible, multi-use facility will be preferred over a "static" meeting venue. Movable walls, risers, sound systems, and other components may be required to accommodate other uses such as cultural presentations, concerts, and other activities beyond meetings and receptions.

The venue location would need to maximize opportunities associated with either a lively downtown accented by restaurants, drinking places, and entertainment; or a lakeside "retreat" location offering golf, fishing or other packaged amenities. The South Jackson Civic Center, being located near Downtown, could provide adjunct space for ancillary or spin-off meetings. Parking will be an important requirement for the site. Proximity to (and preferably adjacency to) lodging may be required in order to maximize potential for accommodating out-of-town attendees, even if meetings or functions are sponsored by local groups. The event center could help drive at least a portion of the market for lodging rooms. *A major reason that several other local event centers in Middle Tennessee have failed to generate sustainable operations is because they were built without access to lodging, thus limiting their market base to local one-day events.*

Co-Branding and Partnering

The venue's capture also assumes that there is an aggressive marketing effort to recruit meetings and events to the space and that management is handled professionally by an experienced contractor/operator. This market analysis has indicated a requirement for a strong co-branding effort associated with either the aerospace activities for which Tullahoma is known or with Tullahoma's positioning at the heart of the whiskey trail. Strong brands that will help in marketing and

Distillery

programming the venue could include lifestyle brands like Jack Daniel's and George Dickel, or aerospace institutions like AEDC and UTSI, and possibly some combination of both. Ideally, the venue would be programmed in collaboration with these partner entities to bring people to Tullahoma for special events, tours, lectures, cultural activities, meetings, research colloquia, or other events associated with these entities. As noted above, collaboration with the South Jackson Civic Center would help expand options and flexibility by providing multiple sites for larger conferences and ancillary meetings. Such partnering would set Tullahoma's event center apart from others in the region and provide a stronger platform for programming and sustainable operation.

Next Stage Feasibility Analysis

Again, the aforementioned event schedules represent the *potential market at full operation* (within five years after initial marketing), not necessarily the recommended utilization program. But, an understanding of this market "envelope" is important to ensure that the facility captures the appropriate target uses necessary to meet the basic requirements for operational efficiency and financial sustainability, and to attract a contract operator if appropriate.

This market analysis forms part of a "pre-feasibility" conceptual phase and provides a general overview of the market potentials for a meeting venue in Tullahoma. But if a specific site is selected and an effort to pursue this concept, then there would need to be a full market and financial feasibility analysis completed to determine the long-term viability and financial sustainability of the venue. There will also be a need to test the potential for other uses of the facility (cultural events, concerts, rentals, etc.) to fill any gaps in utilization and revenue. Event venues have been tried and failed in the past in Tullahoma, while others in the region have performed at less-than-optimal levels. The City will want to avoid direct competition with the existing South Jackson Civic Center or sanctioning and supporting a "white elephant." As such, every effort should be made to complete thorough due diligence prior to funding or promoting development of an event center in Tullahoma.

Tallahoma Comprehensive Plan

APPENDIX E.

ECONOMIC DEVELOPMENT STRATEGY

ECONOMIC DEVELOPMENT STRATEGIES

Tulahoma Comprehensive Plan

Prepared for The Walker Collaborative
And the City of Tullahoma
January 20, 2022

By ***Randall Gross / Development Economics***

Section 1. OBJECTIVES AND VISION FOR ECONOMIC DEVELOPMENT

An effort was made as part of the comprehensive planning process to engage with stakeholders on their vision for the future of Tullahoma and on the economic development objectives aimed at helping the city realize that vision. Input was gathered during public and focus group meetings, and a special economic development “visioning session” was held virtually with a representative sample of stakeholders engaged in various aspects of Tullahoma’s development. The information gleaned from these various meetings, coupled with technical analysis conducted as input to the plan, helped yield an overall vision and objectives for the city’s future economic development, as outlined below.

Vision for the Future of Tullahoma

A vision statement for the economic development of Tullahoma in the future was compiled and summarized from the various statements and priorities identified by residents and key stakeholders. This vision statement is summarized below:

A Unified Message of Tullahoma in 2040:

Tullahoma is a vibrant economic hub and a city on the move; a tourism destination with natural assets and a culture of innovation in aviation testing technologies and medical services; a proud, attractive, and walkable community with great schools, diverse housing, and a small-town lifestyle.

This statement draws on several elements prioritized by stakeholders. First, there was the desire for the city to be “unified” in terms of its “voice” for marketing and promoting the city for business and economic development. This desire contrasts with the perception that there are various entities marketing the city without a consistent message. There was also a desire expressed for unifying the city’s neighborhoods and demographic groups, with all residents of the city sharing in Tullahoma’s growth and prosperity.

In the future, the city’s known strengths in aviation testing and medical services would still form the backbone of the city’s economy, but there would also be more tourism development, building on aviation heritage as well as on the city’s positioning at the heart of the Tennessee ~~Distillery~~ ^{Whiskey} Trail. The vision statement reflects a desire to retain, protect, and enhance other existing strengths like the city’s great schools and small-town lifestyle; but also aspires to create a more aesthetically pleasing and walkable community, one with more diversity in its housing mix, especially to accommodate the local workforce.

Objectives

More specificity in the approach to economic development came through objectives oriented to meeting specific needs or aspirations, as identified below.

1. Become a **medical services hub** and a **center for technology innovation**, with a focus on testing and product ^{and} ~~&~~ process development.
2. Identify and prioritize **sites and buildings** for rehabilitation, redevelopment, and new development (e.g., older warehouses, airport business park).
3. Enable development of **diverse housing** to accommodate the needs of the workforce, professional recruitment, and lifestyle changes.
4. Become a **tourism destination**, building on existing assets and through-traffic.
5. Develop a unified voice in **marketing our strengths**.
6. Enhance our aesthetic qualities through **streetscape improvements**, especially in our commercial corridors and gateways.
7. **Diversify our fiscal base** in order to enable more opportunities for funding and staffing projects and programs that are needed in the city.

Stakeholders in general have a positive outlook on Tullahoma, present and future, and there was a desire to capture the city's innovative spirit to harness its growth. The following sections of this report provide strategies and analysis to support these objectives as a component of the city's economic development efforts.

Section 2. KEY STRATEGIES

This section builds on economic baseline, opportunities, and workforce assessments; coupled with stakeholder input to define key strategies for economic development in Tullahoma. Sector-specific strategies are provided for existing and potential new Target Sectors including Health Services ^{and} Biomedical Industries, Aviation ^{and} Aerospace Technology, and Tourism. These strategies focus on the anchors of these sectors, along with the components of their business growth and development, labor force, and approaches for growing the sectors in Tullahoma. A strategy for re-use, redevelopment, and new development of Buildings ^{and} Sites is also provided, in light of priorities identified by local stakeholders. A strategy for refining the city's Economic Development Structure is also recommended as a framework to help create more strength and consistency in the city's marketing and development efforts.

Health Services ^{and} Biomedical Industries Hub

Tullahoma is recognized as a medical hub for Coffee, Franklin, and surrounding counties. ^{Vanderbilt Tullahoma-Harton Hospital} ~~Vanderbilt-Tullahoma-Harton Hospital~~ (formerly Tennova Healthcare Harton) serves as an important anchor for medical and health care services in southern Middle Tennessee. Health care remains one of the nation's fastest growing economic sectors. There is the opportunity to grow Tullahoma's hub and concentrate more health care services in the city as a spur for high-value and high-wage jobs.

Anchor Uses and Activities

^{Vanderbilt Tullahoma-Harton Hospital} ~~Vanderbilt-Tullahoma-Harton Hospital~~ As noted above, ~~Vanderbilt-Tullahoma-Harton Hospital~~ is an important anchor for the delivery of health care services in the area. The 135-bed facility provides a broad range of both inpatient and outpatient medical services. Among other things, the hospital offers imaging services, an orthopedic surgery unit, sports medicine, critical care unit, chest pain center, sleep medicine, rehabilitation/physical therapy services, and other services. Importantly, the hospital is affiliated with a trusted Middle Tennessee-based name in academia and medical care.

^{Vanderbilt Tullahoma-Harton Hospital} ~~Vanderbilt~~ also operates its **LifeFlight** helicopter service based at Tullahoma Municipal Airport, which not only enhances Tullahoma's role as a center for emergency medical services but also it's historic role as a center for aviation and transportation. LifeFlight has added a base in Tullahoma for ground ambulance advanced life support (ALS). Positions associated with this base include advanced EMS technicians, paramedics, and management. There is the opportunity to promote and expand such support services.

Aside from the hospital, medical doctors, and clinics, Tullahoma has a small cluster of health care providers, services, suppliers, and associated support activities. Examples include LifeAid Medical Equipment, Fresenius Medical Care, Tullahoma Drug Store, Life

Care Center of Tullahoma, Walgreens, Home Instead Senior Care, CVS, Fast Pace Health Urgent Care Center, Hometown Respiratory Consultants, and others.

Educational Resources

Motlow State Community College offers relevant programs in Bioinformatics, Health Sciences, Nursing, Preclinical Lab, and Pro-OT & PT that enhance the base of people graduating with health care skills in Tullahoma. Enrollment at the Moore County / Tullahoma campus peaked at nearly 2,000 students in Fall 2017 and fell precipitously during the COVID Pandemic to a low of just 614 in Spring 2021 (up to 737 in Fall of that year). Enrollment fell system-wide during this period, so the decrease was not unique to the local campus. Meanwhile, online learning in the Motlow State CC system increased from less than 100 in Fall 2018 to 2,700 by Spring 2021, again mostly an impact of the Pandemic on in-class learning. As of Fall 2021, about 11% of Moore County campus students were enrolled in Nursing and 7% in Health Science programs. A handful were in paramedic training, bioinformatics, and related fields.

The largest shares of Motlow State CC students at the local campus originate in Shelbyville, followed by Manchester, McMinnville, and Tullahoma. Others are from Fayetteville and Winchester, plus about 40 small towns scattered across southern Middle Tennessee and north Alabama. The four largest originating high schools are Coffee County Central (17%), Shelbyville Central (14%), Tullahoma High (13%), and Franklin County High (13%).

Health Care Services ^{and} Related Business Recruitment

Economic Development efforts can be geared towards enhancing the **health care services** base in Tullahoma through more targeted business recruitment efforts. Initially, it will be important to identify any significant gaps in the supply of health care services or related businesses in the area which provide an opportunity for business recruitment or development.

Given Tullahoma's strength as a center for aviation and aerodynamic testing technologies, there may also be opportunities for **small medical device and equipment manufacturers, suppliers, or repair services** who could utilize Tullahoma Municipal Airport for distribution. Generally, producers or suppliers of small, unique, and/or expensive specialized equipment are more likely to use air freight to distribute their product than would companies that are more dependent on ground freight services. Given Tullahoma's distance from the interstate highway network but also given its local airport access and the specialized skills and equipment anchored at AEDC, opportunities may exist for further development of this niche market. Synergies may also exist between the medical emergency transportation hub that ~~Vanderbilt~~ ^{Vanderbilt Tullahoma-Hartton Hospital} has established at Tullahoma and the production or distribution of specialized emergency medical services and equipment.

Potential business recruitment opportunities identified for this effort include the following (along with their North American Industrial Classification System (NAICS) code):

Health Care & Related Services

- Testing / Forensic Laboratories 5413-80
- Specialized Medical Training Schools 6113-10
- Offices of Other Health Practitioners 6213
- Audiology/Hearing Testing Services 6213-40
- Outpatient Care Centers 6214
- Medical Laboratories 6215-11
- Diagnostic Imaging Centers 6215-12
- Other Miscellaneous Ambulatory Health Care Services 6219-99
- Specialty Hospitals 6223
- Nursing Care Facilities 6231
- Intellectual & Developmental Disability, Mental Health Facilities 6232
- Continuing Care Retirement Communities & Assisted Living 6233

Related Manufacturing & Supply

- Ventilation, Heating, AC & Refrigeration Equip Mfg. (e.g., Laboratory Freezers) 3334-10
- Other Misc. General-Purpose Machinery (e.g., Centrifuges, Lab Furnaces) 3339-99
- Analytical Laboratory Instrument Manufacturing 3345
- Irradiation Apparatus Manufacturing (e.g., Suction Tubes) 3345-17
- Medical, Dental, and Hospital Supplies and Equipment Merchant Wholesale 4234-50

The viability of these targets for recruitment would need to be tested further, but baseline analysis suggests that there are gap and growth opportunities for these businesses based in part on the city's competitive strengths in health care services, aviation, and testing technologies.

Operating Structure

In order to advance recruitment and business development efforts, it is recommended that the City and its economic development partners establish a committee charged with outreach, research, and support for this sector. Committee membership might include representation from ~~Vanderbilt-Hartton Hospital~~, Motlow State Community College, and local health care service providers

Vanderbilt Tullahoma-Hartton Hospital

along with the airport and AEDC. The committee would inform the broader efforts of the City's economic development and marketing team as identified later in this section.

Aviation ^{and} Aerospace Industries And Associated Technology Development

Tulahoma has long been a center for innovation, with the testing and development of aviation and aerospace technologies that have protected and contributed to America's military and aerospace dominance. The presence of the Arnold Engineering Development Complex (AEDC) has driven this innovation, through public and private sector skills and expertise. While AEDC has had an enormous impact on the local economy, driving demand for local services and supporting local business development, the base has not yet spun-off an active, sustainable core of private companies developing and manufacturing commercial products in Tullahoma based on the base's technology innovation and strengths. Yet, there are opportunities to build on the local skills, expertise, and possibly facilities and equipment that are unique to AEDC to spur entrepreneurial development and attract businesses to commercialize emerging technologies. Efforts are already underway to attract an Air Force Innovation Hub to Tullahoma to help interpret AEDC and local aviation heritage, while also promoting holistic opportunities for economic development. These opportunities are explored below along with strategies to leverage local assets including AEDC, the U.T. Space Institute, and the Tullahoma Municipal Airport for the purposes of economic development.

Anchor Uses and Activities

As noted above, ^{AEDC}~~AEDC~~ is a global leader in aviation and aerospace innovation/R&D, testing, and development. ^{AEDC}~~AEDC~~ "conducts developmental testing and evaluation for the nation through modeling, simulation, ground, and flight testing," focused on aerospace and defense systems. ^{AEDC}~~AEDC~~ has among the "most advanced and largest flight simulation test facilities in the world," with nearly 60 aerodynamic and propulsion wind tunnels, rocket and turbine engine test cells, space environmental chambers, arc heaters, ballistic ranges, centrifuges, and other specialized uses.¹ At least 14 of the center's test units are unique in the world.

Much of AEDC's activities are carried out by a small set of military contractors with specialized expertise and experience, including **National Aerospace Solutions** (NAS, led by Bechtel National, with Sierra Lobo and GP Strategies Corporation), ^{and}~~GP Strategies Corporation~~, **Akima Support Operations** (ASO), and **OBXTek** (a Joint Venture of Jacobs Technology, Pacific Architects & Engineering, and GP Strategies Corporation). Smaller contractors provide support services and supplies.

¹ Arnold Engineering Development Complex. Arnold Air Force Base Web Site, 2021.

Tullahoma Regional (Municipal) Airport, because of its lead role in local aviation and potential for partnerships, is also an important asset for growing Tullahoma's technology base. The airport is situated adjacent to under-utilized land that could be further developed for associated activities that could use airport transportation, logistics, and technologies. Jacobs Technology already has a major office facility located adjacent to the airport. As noted elsewhere, the City's Airport Authority has made investments in the Tullahoma Regional Airport to upgrade it to achieve Select Tennessee certification and to develop a 114-acre Business Airpark. The City has been marketing and engaged in relationship building to promote the airpark and recruit aerospace and aviation-related businesses.

Tullahoma also benefits from its proximity to the research and development facilities located at **Redstone Arsenal** in Huntsville, Alabama, just over one hour away. While not located in Tullahoma, Redstone scientists nevertheless maintain aerospace research relationships with their counterparts at AEDC. Clearly, Tullahoma's geographic positioning near Redstone and its contractors provides opportunities for further spin-off in aerospace innovation and technology development.

Educational Resources

The **University of Tennessee Space Institute (UTSI)** is clearly another anchor use as well as educational resource available for leveraging and growing the technology sector in Tullahoma. This small campus, with about 100 post-graduate students, is affiliated with the State university system and therefore has access to state government resources and economic development policy promotion. UTSI has over 80,000 square feet of laboratory space dedicated to aerospace technology research and development. Research Centers at the institute include BEAMS (Biomedical Engineering and Materials Science), CEAR (Computational and Experimental Aerospace Research), CLA (Center for Laser Applications), HORIZON (High-Speed Original Research and Innovation Zone), and the Mössbauer Lab (experimentation and analysis of spectra).

and

Entrepreneurial Development & Business Recruitment

There were opportunities identified for both entrepreneurial development and business recruitment relating to the AEDC hub. UTSI educational resources, and innovation activities clustered in Tullahoma. Some of these opportunities relate directly to aviation and aerospace, but also to broad-based testing and product development. There is the short-term opportunity for attracting development of an "Innovation Hub," similar to those located at other Air Force installations and offering space for small entrepreneurs to develop their concepts. There may also be longer-term opportunities for a broad-based Technology Park that could attract investment, capital and jobs not only in emerging technologies and product development but also downstream commercialization and manufacturing of products for distribution. This concept has not been tested. Initial phases of technology development could be promoted by the Innovation Hub and through relationships with UTSI.

and
Arnold Heritage Center & Innovation Park. A proposal has been developed for creation of an Arnold Heritage Center and Innovation Park, which would focus on several different objectives, namely:

- a space for accommodating technology-related innovation, entrepreneurship, and business development,
- a tourism hub to celebrate Hap Arnold and AEDC heritage including innovation in aviation and aerospace technology
- a recreational facility and park to promote better health and to fulfil a DoD directive to enhance quality of life and recruitment

A proposed “multipurpose heritage/cultural center” would house interpretive space, event space, and a flex theatre. Adjacent to this facility is proposed office space for entrepreneurs, workforce development, and military spouses along with outdoor public spaces, trails and recreational activities. The facilities are proposed to be located in the Waggoner Park area, on AEDC property (or, alternatively near the Tullahoma Municipal Airport). It is assumed that the City will submit this proposal to the US Air Force/AFWERX program for funding consideration. Air Force innovation hubs already exist or are under development at Barksdale Air Force Base (StrikeWERX, associated with the nuclear industry, Louisiana), Kirtland Air Force Base (NewSPACE, associated with the emerging space industry, New Mexico), Eglin Air Force Base (DefenseWERX, associated with munitions technology, Florida), Los Angeles (SpaceWERX, associated with the space industry, California), Scott Air Force Base (ELEVATE, focused on technology transfer, Illinois), and others.

Technology Park. A longer-term opportunity rests in the concept of a technology park anchored perhaps by the aforementioned innovation hub (Arnold Heritage Center et al) and potentially by specialized functions or spin-off operations of UTSI and AEDC, as key drivers for innovation activity. The park would be focused on product development, commercialization and manufacturing that would maximize entrepreneurship and job creation. As such, the park would need to access technology transfer, specialized locally-based expertise and equipment, and other elements of successful R&D or technology parks that help to leverage entrepreneurial activities and also attract national or international investment.

- and**
- **Aviation & Aerospace Technologies**. There would clearly need to be a focus on aviation and aerospace-oriented technologies based on the expertise, testing activities, innovation, and specialized equipment concentrated at AEDC as well as the presence of a local airport facility. Such technologies might generate spin-off related to the following industries
 - Ultralight Aircraft Testing & Manufacturing NAICS 3364-11
 - Aircraft Engine & Engine Parts Manufacturing 3364-12
 - Guided Missile and Space Vehicle Manufacturing 3364-14
 - Rocket Engines, Guided Missiles Manufacturing 3364-15
 - Guided Missile and Space Vehicle Parts Manufacturing 3364-19

- **Medical-Related Technologies.** As noted earlier, there are synergies ^{and} that could be further developed between the specialized innovation and testing activity at AEDC, the Biomedical Engineering & Materials Science (BEAMS) activity at UTSI, and the presence of an accessible airport for distribution of specialized equipment. The spin-off activities related to these technologies might include the following, as noted earlier:
 - Ventilation, Heating, AC & Refrigeration Equip Mfg. (e.g., Lab Freezers) NAICS 3334-10
 - Other Misc. General-Purpose Machinery (e.g., Centrifuges, Lab Furnaces) 3339-99
 - Analytical Laboratory Instrument Manufacturing 3345
 - Irradiation Apparatus Manufacturing (e.g., Suction Tubes) 3345-17
 - Medical, Dental, and Hospital Supplies and Equipment Merchant Wholesale 4234-50
- **Aerodynamics Technologies.** Again based on the specialized expertise, testing activities, and equipment housed at AEDC and its contractors and personnel, there are opportunities to build on the broader work of the base relating to aerodynamics that might be applied to other industries above and beyond aviation and aerospace. Such industries include HVAC, refrigeration, wind turbines, ventilation, and related equipment with multiple applications across business and industry. Certainly the wind energy industry could be considered an especially important target for business development, given the major activities associated with wind tunnels and testing aviation and aerospace equipment at AEDC. Associated instrumentation and measuring devices could also be considered a potential target for development, again given the base's competitive strengths and the cluster of skills in contractors associated with AEDC. Possible spin-off industries include the following:
 - Farm Machinery & Equipment Mfg. (Blowers, Forage) NAICS 3331-11
 - Ventilation, Heating, AC & Commercial Refrigeration Equip. Mfg. 3334-10
 - Commercial & Industrial Fan & Blower and Air Purification Equip. Mfg. 3334-13
 - Heating Equipment Manufacturing 3334-14
 - AC & Warm Air Heating Equip. & Comm/Ind. Refrig. Equip. Mfg. 3334-15
 - Propellor Straightening Press Manufacturing 3335-19
 - Turbine & Turbine Generator Sets Mfg (e.g., Windmills/Electric Generators) 3336-11
 - Air & Gas Compressor Manufacturing 3339-12
 - Pneumatic Tube & Conveyors Manufacturing 3339-22
 - Automatic Environmental Control Mfg. (Combination Limit & Fan Controls) 3345-12
 - Instrument Mfg. for Measuring & Testing Electricity/Signals 3345-15
 - Measuring, Controlling Device Mfg (Vibration Meters, Analyzers, Calibrators) 3345-19

- Small Electric Appliance Mfg. (Fans, Heaters, De/Humidifiers, Air Purif. Equip.) 3352-10
- Motor Vehicle Electrical Equip. Mfg. (Fans, Electric Cooling, etc.) 3363-20
- Ventilation Equipment and Supplies Merchant Wholesalers 4236-20, 730, 830

Importantly, the potential for development of these industries has not been tested, and the approach for developing, marketing, managing, structuring, siting, phasing, and financing (including venture capital for) a technology park would need to be determined through a **feasibility study**. Therefore, it is recommended that a next step produce a feasibility study to develop a concept for the park that would be economically and financially sustainable and viable, especially in terms of the relationships that would need to be developed with AEDC/USAF, UTSI, Tullahoma Municipal Airport, Motlow State CC, and other potential partners.

Funding/Management Structure

The proposal for the innovation hub has suggested a “partnership” with the US Air Force for an enhanced use lease and memorandum of understanding (MOU) for operation, with funds leveraged from multiple agencies including the Department of Commerce/Economic Development Administration (EDA), TVA, University of Tennessee/UTSI, Department of the Interior/National Park Service, Department of Defense/AEDC/AFRL, NASA, and private industry partners. The proposal also recommends initiation of an advisory group/committee and a capital campaign to raise funds for its development.

Existing innovation hubs located at Air Force bases around the country are operated internally from within the U.S. Air Force structure including AFWERX, the division responsible for the SBIR program which “harnesses small business innovation research to enable the Air Force to develop and adopt commercially viable innovations.”

If, in the longer-term, the City developed a technology park strategy, then a broader-based operations, management and financing approach would be recommended based on the findings of a feasibility study. Certainly there are opportunities as well for the City to enable both small business innovation and technology development as well as business recruitment through a host of incentives and policies that would leverage such activity. Examples might include partial sponsorship or collaboration on development of incubators and business space, airport land, and support infrastructure. The City might also consider incentives such as small business grants to leverage purchase of specialized equipment. Often, such grant agreements come with claw back provisions that allow the City to recoup equipment or other investments due to company failure or for other reasons.

Tourism Destination

Economic analysis and stakeholder visioning has indicated a need for the City of Tullahoma and its partners to become more directly engaged in marketing, developing, and promoting the city as a tourism destination. The proposed Arnold Heritage Center, as discussed previously, could augment the efforts of the Beechcraft Heritage Museum in interpreting the city's aviation and aerospace heritage for tourism purposes. Being at the heart of the Tennessee Whiskey Trail also provides opportunities for capturing a larger share of the existing and potential whiskey tourism market. Other opportunities, identified elsewhere in this plan, relate to the city's many recreation assets, creating more destination-oriented events, and accommodating live music and events downtown.

Anchor Uses and Activities

The anchor tourism uses and activities can be aggregated into four main categories: aviation ^{and} ~~Distillery~~ ^{and} aerospace heritage, whiskey trail, recreation amenities, and events. The **Whiskey Trail** connects Jack Daniel's ^{Distillery} and George Dickel Distillery through downtown Tullahoma. These two internationally recognized brands are housed practically in Tullahoma's back yard. There may be the opportunity for one or both of them, or another distillery, to operate a micro-distillery, bar/restaurant, or retail establishment in downtown Tullahoma, although the market potential for such uses will have been tested as part of the city's retail market analysis.

As noted above, the city's ^{and} ~~Aviation & Aerospace Heritage~~ is captured currently through the Beechcraft Heritage Museum, whose collections could be augmented and celebrated further through the proposed Arnold Heritage Center. The heritage center proposal suggests that this facility would be among the few that actually honor the legacy of Air Force founding father "Hap" Arnold. It is also recommended that a new City library be established in the downtown area that houses special collections relating to Air Force history, aviation, and aerospace. Such special collections could become an attraction in themselves, not only to researchers but through special exhibitions and interpretation for the general public.

Tullahoma is located in an area blessed with **Recreation Amenities** that already serve as anchors for recreation tourism that could be promoted further. Such amenities include the Short Springs State Natural Area and areas associated with the various lakes (e.g., Lake Normandy, Woods Reservoir, and the 3,546-acre Tims Ford State Park), within or near the city. Tims Ford already brings thousands of visitors to the Winchester-Tullahoma area each year, so there are likely to be opportunities for capturing more recreation spin-off and activity associated with this existing visitor base. The proposed Rock Creek Park and greenway would also add significant value to Tullahoma's recreation base and would further enhance its amenity base as an important asset for attracting and retaining workers who may otherwise ^{live} ~~like~~ in Murfreesboro or other urban hubs.

Concepts for an outdoor public space in downtown Tullahoma are presented elsewhere in this plan. An outdoor public space and/or amphitheater could help the city sustain a more active calendar of **Live Music and Special Events** that, as with the recreation amenities, help to create assets for attracting and retaining the labor force. Being located in Middle Tennessee, not far from the epicenter of music tourism, it is important for Tullahoma to examine opportunities for enlarging its base of music-related events and activities, especially where they celebrate local musical heritage and native-born performers. This plan included a market analysis for development of a meeting venue, which determined that while there is some potential for utilization of such a facility, co-branding with a recognized name (e.g., Jack Daniel's or George Dickel) would enhance opportunities for capturing a broader market base. The report also strongly recommends that a full feasibility study be conducted to determine such a facility's operating sustainability, especially in light of competing facilities nearby in Manchester and Murfreesboro.

Business Recruitment and Development

In order to promote business development relating to the whiskey trail and associated tourism, it is recommended that findings of the retail market analysis completed for the City be used as a basis for identifying specific business targets and opportunities for business leveraging and commercial development. The market analysis will have provided forecasts on tourism-generated market support for specific categories, businesses and brands as well as the requirements for recruitment and leveraging.

Establishing strong anchors like the Arnold Heritage Center would help in securing more aviation, aerospace, and military-related tourism, especially among veterans and military families but also among those interested in aviation and aerospace heritage. So, supporting the submittal of the heritage center proposal is a first step. Concurrently, Tullahoma should examine opportunities for creating stronger ties and relationships with Huntsville, Redstone Arsenal, and the Marshall Space Flight (U.S. Space & Rocket) Center. Nearly 800,000 people visit the U.S. Space & Rocket Center per year. So, it is in Tullahoma's interest (much as it is to establish relationships with the distilleries) to conduct outreach and collaborate with both AEDC and Marshall SFC on establishing regional tours and combined visit opportunities (in concert with AEDC, of course). A regional aviation and aerospace heritage tour might include Redstone/Marshall, AEDC/UTSI, the Beechcraft Heritage Museum, the new Aviation Heritage Park in Bowling Green, Kentucky, and the Southern Museum of Flight in Birmingham. There may also be opportunities to expand Huntsville's Space Camp concept to include use of some facilities at AEDC, if there are any that could be opened to the public. Growing these partnerships and facilities could generate spin-off in the form of potential lodging, retail, and restaurant sales in Tullahoma.

The City's retail market analysis would have also tested the potentials for recreation-oriented tourism businesses that could be recruited to support tourism to the area's lakes and natural areas. Such businesses might include sporting goods and apparel stores, bicycle supply and mechanics, tubing or other water recreation tour operators and suppliers, bait ~~&~~^{and} tackle shops, boat and marine vehicle dealerships, and others. The City would use the findings of the market analysis to focus on economically-viable business opportunities for recruiting business operators and entrepreneurs. Resort lodging may provide another opportunity for the City to

explore with potential developers along Lake Normandy or elsewhere in the city. Aside from retail and lodging, the City would focus on developing new amenities, as discussed previously, in the form of the downtown-area “Rock Creek Park” and greenways that generate recreational opportunities near the heart of the city. With the development of new venues and facilities, the City may then be able to market itself more effectively for sports and recreation-based tourism.

Similarly, the City’s focus on attracting more meetings and events would be on creating an outdoor venue in the downtown area that could accommodate music and other public events, and on testing the long-term sustainability of a meeting venue. The Tullahoma Area Chamber of Commerce already has a role in promoting events, but there is a need for the physical development of spaces to accommodate events in a supportive setting.

Marketing ^{and} Development Structure

As noted above, the Tullahoma Area Chamber of Commerce already plays an important role in marketing and promoting tourism to the city. There is also a Tourism Committee appointed for the city. That being said, there is a need for an entity engaged more on the product development side of tourism, as opposed to marketing alone. The City of Columbia has created a tourism director staff position, who oversees both the development of tourism products as well as marketing for the city. This position is funded through the City’s hotel/motel lodging tax. Tullahoma may not have the resources by itself to create a municipal tourism position, but there may be opportunities to collaborate with other agencies (e.g., AEDC, County/IDB), in funding a broader development authority position dedicated to various development projects including tourism product development. The development component of this position is oriented to conducting outreach, such as to AEDC, Marshall Space Flight Center, Jack Daniel’s, George Dickel, resort lodging developers, Beechcraft Heritage Museum, potential recreation retailers, and others (as indicated in various places in this section) to facilitate discussions on potential products and development opportunities. This position would also work within the various City agencies to coordinate on planning ^{and} zoning, permitting, master planning, proposals, grant funding, and development relating to the various potential tourism projects (such as Rock Creek Park, the Arnold Heritage Center, and others).

Buildings ^{and} Sites

Stakeholders have noted a dispersed presence of underutilized buildings and sites throughout the city, but especially near downtown and along several corridors radiating from the city. Several strategies for enhancing the utilization of these sites and buildings are provided here as input to the overall economic development element of the plan.

Inventory and Assessment

The first step in this process would be to inventory buildings and sites, and to assess their conditions for reuse, rehabilitation, or redevelopment. A retail market analysis will often provide an inventory of each commercial building and use, which will serve as the basis for assessing conditions and prospective higher and better uses. If that inventory has not been accomplished for the city, then it is recommended that such an inventory be completed that includes the building or site, address, ownership, zoning, existing use, square footage (both living space and total), parking, year built, and conditions rated on a consistent scale that can inform potential reuse.

Marketing Program

Once buildings and sites have been inventoried and conditions assessed, then a priority list would be developed that focuses on those buildings and sites that are vacant or underutilized, where the owner is willing to rent or sell the space (determined through outreach to the owners), and that are positioned in key locations such as along important gateways into the city, in corridors in need of reinvestment and redevelopment, or in/near the downtown area. Once this priority list has been established, then it would be disaggregated into those properties that are marketable and those that would require rehabilitation, restoration, or demolition in order to be marketable for prospective uses. For those properties that are marketable as-is, then the City would work with owners and brokers to ensure that they are actively marketed and would offer to facilitate or fast-track permits, approvals, and utilities for uses that are deemed to be in the City's interests.

Building Rehabilitation and Redevelopment District Incentives

The City would work to define redevelopment district(s) that include clusters of the buildings and sites identified through the inventory. One redevelopment district might be focused on the downtown area, for example. For those buildings in need of rehabilitation as well as undeveloped sites, the City would offer a package of incentives if located within a redevelopment district. The **Downtown Redevelopment District** might offer access to tax increment financing (TIF) monies if it can be shown that public or private improvements will leverage an incremental increase in the value (and therefore tax basis) of properties in the district. Public improvements in that area might include, for example, extension of a greenway, development of Rock Creek Park, creation of an amphitheater for public events, or streetscape improvements on downtown streets.

A separate **South Jackson Redevelopment District** is recommended that would have a focus on revitalization of and investment in the infrastructure and business base in this predominately African American community. Business incentives might be offered in this corridor that help to leverage the success of existing and potential new businesses, such as through building façade

grants, a co-op purchasing program (that writes down the cost of supplies by wrapping them into the Citywide supply chain), and loan guarantees (that require no up-front financing but allow the City to act as guarantor for bankable but higher-risk small business loans in the area). The latter might only require that the City enable the establishment of an interest-bearing or investment trust fund to be held as a guarantee.

Streetscape Program

Lower-quality urban aesthetics were mentioned by a number of stakeholders as an issue impacting on the quality of life of existing residents but also on economic development and labor force recruitment and retention efforts. It was determined that a proactive streetscape program could help the City improve its aesthetic and image among residents, prospective employees, and visitors alike. Streetscaping can sometimes help leverage revitalization of buildings and sites, by encouraging more private investment in areas that become more appealing to pedestrians and passing traffic.

Streetscaping can be accomplished in well-planned phases that allow time for the City to generate sufficient advance funding or financial resources to pay for improvements, some of which (e.g., undergrounding of utilities) can be expensive. Certainly it will be critical to define priority districts, informed by the elements of this plan, for streetscaping programs. This strategy has already suggested the creation of at least two redevelopment districts, one downtown and the other along South Jackson. Streetscaping improvements can be incorporated into the programs designated for these special districts.

Some streetscaping programs also generate funding through a self-imposed special assessment (e.g., such as through a Business Improvement District), but the density and value of properties within the downtown and South Jackson corridors are unlikely to contribute sufficient revenue to support improvements, even if assuming that property owners agree to the levy. The downtown TIF could generate some funding to support streetscaping, at least in the downtown core, but the extent of that incremental revenue (necessary to pay the bonds) would need to be projected.

Workforce Housing

Another strategy for enhancing the utilization of vacant or underutilized sites and buildings is to encourage the development of workforce housing, which can be focused in the corridors where some of this vacancy exists. As noted in the Housing Market Analysis component of this plan, there is a need for more housing to accommodate young residents and workers who otherwise are commuting from Murfreesboro and other locations because of the lack of workforce housing in Tullahoma. The City can acquire sites in these high-priority redevelopment districts or corridors and create an RFP process to recruit workforce housing developers to these sites, using the land as a negotiating tool for leveraging quality housing.

Economic Development Structure

Stakeholders also noted a disconnect between the myriad agencies, committees, and organizations conducting various elements of economic development in Tullahoma and surrounding areas. There is a need for collaboration, but also for consistent marketing and for designating responsibilities and resources to the appropriate parties to carry out specific strategies as outlined herein. The following recommendations aim to refine the existing economic development processes in which the City and its partners are currently engaged.

Tullahoma Area Economic Development Corporation (TAEDC)

The existing TAEDC should fulfill much of the role of directing economic development efforts for the City. However, there appears to be a lack of strategic planning, oversight, delegated powers, and tracking to ensure that economic development efforts are accomplishing goals and objectives set forth for the city. In order to shore up this position, enhance its mandate, and strengthen outcomes, the following strategies are recommended.

1. **Develop an Economic Development Strategic Plan.** This economic development element of the comprehensive plan can provide a starting point for developing a more strategic plan for the City. The elements of the plan would build on this report and include the goals and objectives, projects list and status report, accomplishments, recruitment targets, marketing and branding plan, funding and incentives, sites and buildings, and a list of metrics and benchmarks to be used to measure success. A targeted implementation action plan (see below) should also be developed as part of the strategic planning process. The ED Strategic Plan should be presented annually to the Council; with updates on accomplishments, metrics, and benchmarks reported quarterly.
2. **Target Implementation Actions.** An implementation Action Plan should be developed (as part of above) that responds to the recommended strategies herein plus any other economic development initiatives in which the City is engaged (e.g., retail business recruitment, airport industrial park, etc.). The Action Plan should have specific timetables, and designated responsibilities, funding requirements, and sources of funding where applicable. Components such as streetscaping that would be coordinated by a different agency should nevertheless be included as an economic development initiative in collaboration with other agencies or departments.
3. **Restructure Committee System.** The existing and recommended new City committees relating to Economic Development, including the Tourism Committee, the Health Care Services ^{and} Medical Industries Committee, and the Dream Tullahoma Committee, coupled with representatives of the Tullahoma Airport Authority, Tullahoma Utilities Authority, Tullahoma Area

Chamber of Commerce, along with agencies of City Government should serve in an advisory role to the TAEDC, rather than solely as independent committees acting on economic development matters. A Marketing Committee should be formed with representatives of selected economic development entities to coordinate a consistent and “unified” messaging and branding strategy. (Among the elements to be emphasized in marketing the city is the excellent school system). These committees should meet regularly (e.g., quarterly) with the TAEDC to ensure compliance and consistency.

4. **Metrics and Benchmarking.** As noted above, economic development in Tullahoma needs to be measured through a series of objective metrics and benchmarked against comparable and competitive communities. In addition to standard measures including business starts ^{and} failures, job change, relocations, unemployment statistics, real estate valuations, use of incentives, and others; the metrics should also examine fiscal returns from projects, expansion and diversification of the tax base, building reuse and revitalization, new development, housing diversification, and labor force recruitment. The city should examine and identify comparable and targeted communities and benchmark those communities against key factors (such as workforce commutation patterns – live/work).
5. **Adherence and Council Oversight.** ~~There is a need for adherence to the strategic plan and for council oversight of the TAEDC, to ensure that it is meeting objectives.~~ Staff performance needs to be measured in part based on adherence to the strategic plan and accomplishments, as well as metrics, benchmarks, and such measures as number of business outreach, retention, and recruitment meetings; incentives communicated and utilized, marketing plans developed, etc. As noted above, TAEDC should report regularly to Council and meet regularly with its advisory committees to ensure better coordination and communication on branding, image, and marketing initiatives as well as on development projects.

Tullahoma Area Chamber of Commerce

As noted above, it is recommended that the Chamber have responsibility for tourism marketing but would work closely with the City (and its prospective development entity) in developing new tourism products. The Chamber also has responsibility for business networking and retention, working with existing businesses to ensure that they receive the resources they need to thrive in the city. The Chamber has a primary focus on downtown marketing, and again, would work with the City’s development entity where appropriate.

~~**Tullahoma Development Director/Authority**~~ **Expand TAEDC to Include Project Development**

~~A need has been identified for a development entity, such as a Tullahoma Development Authority (TDA), that focuses on project development and business recruitment in the city. Many cities have a local development authority, often focused on downtown or sometimes working in tandem with the industrial development board. The City Manager currently serves to some extent as the de facto development director, but there is a need for a position dedicated to development, with a focus on projects such as the following:~~

A need has been identified for a development entity, such as a Tullahoma Development Authority (TDA), that focuses on project development and business recruitment in the city. Many cities have a local development authority, often focused on their downtown or sometimes working in tandem with the industrial development board. The Community Development department currently serves to some extent as the de facto development director, but there is a need for a position dedicated to development with a focus on projects such as the following:

Randall Gross / Development Economics

- Buildings and Sites: Inventory, physical assessments, and prioritization of buildings and sites for marketing, redevelopment (in concert with the TAEDC Director)
- Workforce Housing: Facilitate site assembly, developer recruitment
- Downtown Redevelopment District/TIF: Rock Creek Park, downtown streetscape program, public performance/meeting/event spaces, redevelopment sites, public parking
- South Jackson Redevelopment District: Streetscape program, facilitate redevelopment, business incentives
- AEDC/Arnold Heritage Center: Implementation, collaboration, facilitation
- Airport/Technology Park: Feasibility study, land assembly, organizational structure
- Recreation Facilities that add amenity value and serve as hubs for sports and recreation tourism.

These activities are primarily development-oriented or involve public infrastructure and leveraging. However, they differ from the more traditional industrial development-oriented activities of the Industrial Development Boards in Coffee and Franklin counties. If the IDB boards envision the diversification of their activities to include some of the aforementioned projects, then the funding of a separate development entity or position may not be warranted. Similarly, the TAEDC position could be wrapped together and consolidated with a development director to create a new position with a broader set of skills. Alternatively TAEDC could function more as a development agency, with some access financing and policy tools that it currently cannot access. ~~Thus, there are three models for consideration.~~

- ~~1. Tullahoma Development Authority (TDA) created as a new agency with some financing capacity to support the efforts of the TAEDC, Chamber, Airport Authority, and other entities on tourism and economic development efforts.~~
- ~~2. TAEDC Director Position in existing agency, expanded to comprise skills in both economic development (business recruitment, etc) and project development.~~
- ~~3. TAEDC transitions to have a broader combined ED and development function, including financing and policy capacity. This agency might have added staff capacity as well to handle development projects as well as business recruitment.~~

~~If the concept of a Technology Park is determined to be a priority project in the long run, then the development position (whether as an independent TDA or as part of the existing TAEDC) will become even more important.~~

Models for consideration: • Expanded responsibilities to comprise skills in both economic development (business recruitment, etc) and project development by partnering with Community Development. • TAEDC transitions to have a broader combined ED and development function, including financing and policy capacity. This agency might have added staff capacity as well to handle development projects, as well as business recruitment.

If the concept of a Technology Park is determined to be a priority project in the long run, then the development position will become even more important.