



## **2020 Annual Report**

### **Comprehensive Economic Development Strategy** **(CEDS)**

*The report has been prepared with the financial assistance of the State of Tennessee Department of Economic and Community Development, Department of Commerce Economic Development Administration and the Appalachian Regional Commission.*

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## 2020 Economic Development/ CEDS Subcommittee

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# Introduction

## East Tennessee Development District and CEDS

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

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

As one of the nine (9) development districts statewide, ETDD serves the largest number of counties in Tennessee. *Sixteen counties and fifty-six municipalities* are supported with community planning, development services and targeted resources, while also serving as a forum for local governments to solve common challenges associated with economic development and growth in both urban and rural communities.

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

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

**The 2020 annual CEDS report is an update on the Performance Goals, Action Plan and the SWOT analysis that have occurred in the last year.**

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

An *extensive public review* is conducted to allow the impacted communities input opportunity. Any public comments are recognized and addressed. The final copy of the CEDS is transmitted to the State of Tennessee and the Appalachian Regional Commission for approval. The completed CEDS is submitted to the Economic Development Administration and accessible via the ETDD website: [www.ETDD.org](http://www.ETDD.org)

This Annual report is comprised of three main elements:

- 1) Current status of the Conditions of the area
- 2) Progress toward Goals
- 3) Updates to the SWOT, Strategic Direction and Performance Measures

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

# Summary

## Demographics and Socioeconomics

### Demographics

Per the 2019 Census information, the estimated population of the State of Tennessee (6.8 million) experienced a 7.6% growth from 2010. The sixteen county ETDD area contains approximately 1.2 million people. Four of these counties experienced positive population growth rates higher than the state average. Loudon (11.3%), Sevier (9.5%), and Knox (8.8%) counties experienced the largest population growth with Roane (-1.5%), Campbell (-2.2%), and Morgan (-2.7%) experiencing the largest negative population trends<sup>1</sup>.

On average, the racial makeup of the entire district is, and has been, relatively consistent. The majority of the population is white (91%), followed by Hispanic/Latino (4%) and African Americans (3%). Scott (6.1%) and Hamblen (6.0 %) counties have the highest percentage of children under 5 years old with Loudon (27%) and Roane (23%) housing the highest percentage of persons 65 years old and older. Loudon and Hamblen counties have the highest percentages of foreign-born residents and residents who speak a language other than English at home<sup>1</sup>.

### Socioeconomic Data

The poverty rate for the State of Tennessee is 14%. Seventy-five percent of ETDD counties are at or above the state poverty rate. Claiborne (23%), Cocke (23%), and Campbell (22%) experience the highest rates of poverty in their communities with Loudon (9%) and Blount (10%) at the lowest rates. Thirteen (80%) ETDD counties have median household income levels lower than the state average of \$50,972. Knox County has the lowest percentage of owner-occupied housing units at 64.5% (\$174,700 median value of housing) with Morgan having the highest percentage of owner-occupied housing at 79.5 % (\$98,400 median value of housing)<sup>1</sup>. Loudon County has the highest percentage of median housing costs at \$201,100 with Scott County at the lowest percentage of median housing costs at \$82,900<sup>36</sup>.

The state unemployment rate is 3.6% (seasonally adjusted). Knox (3.3%) and Blount (3.4%) counties have the lowest unemployment rate with Campbell (5.0%) and Morgan (4.8%) experiencing the highest unemployment rate (*Table 3, Page 11*). Due to current industry expansions, Scott County experienced the greatest degree of positive change in employment rates, moving from 8.1% unemployment in January 2017 to 4.8% unemployment in January 2018<sup>4</sup>. Among the 89 counties in Tennessee with employment below 75,000, only Roane County (\$1,390) had an average weekly wage above the national average (\$1,222). Scott (\$605), Sevier (\$619) and Campbell (\$690) counties had the lowest average weekly wage reported for the first quarter of 2020<sup>13</sup>.

In Tennessee, 12% of the residents are without health insurance. Seventy-five percent of the ETDD service counties have residents at or above this state rate. Sevier (18%) has the highest rate of residents without health coverage, with Union, Grainger, and Morgan (14%) following. 87.5% of ETDD counties have residents under the age of 65 who have a disability, higher than the state average of 11%. Scott (21%), Campbell and Grainger (19%), and Cocke (18%) have the highest rates of residents in this category. Knox (9%) and Blount (10%) have the lowest rates of reported disabilities<sup>1</sup>.

*Reference sources noted end of document*

## Infrastructure, Transportation and Utilities

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

Transportation and Utilities is, and always has been, the largest category of infrastructure in the inventory and totals \$24.8 billion this year - 55.0% of the inventory. Transportation alone, at \$24.2 billion, accounts for nearly all of this category and is larger than all other categories in the inventory.

Tennessee has also created an initiative to develop a statewide plan for future water availability. This plan, TN H2O, will assess current water resources and recommendations to ensure support for economic growth<sup>7</sup>. Roughly a quarter of Tennessee's rural families are without any kind of broadband access, while 23% of the total population reports that they lack a high-speed internet subscription<sup>6</sup>.

*ETDD Counties:* As reflected in the below Table from "*Building Tennessee's Tomorrow*", TN Advisory Commission on Intergovernmental Relations (TACIR) Report of Feb. 2019, transportation, school and water/wastewater have consistently been ranked as the top needs in the ETDD service areas.

*Table 1: Top Three (3) Infrastructure Needs Per County*

County	Three Top Infrastructure Needs
Anderson	Transportation
	Water and Wastewater
	New Public School & Additions
Blount	Transportation
	New Public Schools
	Recreation
Campbell	Transportation
	Water and Wastewater
	Industrial Sites and Parks
Claiborne	Transportation
	New Public Schools
	Water and Wastewater

Cocke	Transportation
	Water and Wastewater
	New Public Schools & Additions
Grainger	Transportation
	Water and Wastewater
	Recreation
Hamblen	Transportation
	School Renovations
	Law Enforcement
Jefferson	Transportation
	School Renovations
	New Public Schools & Additions
Knox	Post-Secondary Education
	Transportation
	Water and Wastewater
Loudon	Transportation
	Recreation
	Water and Wastewater
Monroe	Transportation
	New Public Schools & Additions
	School Renovations
Morgan	Transportation
	Law Enforcement
	School Renovations
Roane	Transportation
	New Public Schools & Additions
	Recreation
Scott	Transportation
	New Public Schools & Additions
	Water and Wastewater
Sevier	Transportation
	New Public Schools & Additions
	Water and Wastewater
Union	Transportation
	Recreation
	School Renovations

*ETDD Counties:* The TACIR report estimates for the upcoming five-year period of 2017-2022, Knox County (\$3,545,379,511) has the highest total estimated cost for infrastructure improvements, followed by Blount (\$671,404,228) and Sevier (\$595,808,119).

## Education and Post-Secondary Education/Training

### Education

"Tennessee inched closer to a 90% high school graduation in the 2018-2019 school year, hitting a milestone for the rate at which students are earning a diploma. The state increased its overall graduation rate to 89.7% and gained half a percentage point over the previous year. Over 72,000 students graduated in 2018-19, with 183 graduates over the previous year, according to state numbers. The state's graduation rate is the highest-ever for the state, which has steadily seen increases since changes made in 2011" (Gonzales, J., Sept. 17, 2019, "Tennessee graduation rate hits all-time high in the 2018-19 school year", *Tennessean*).

All ETDD county schools surpassed the state graduation average with Morgan (99.1%), Grainger (96.4%), and Jefferson (95.98%) securing the highest graduation rates.

*Table 2: 2020 Graduation Rates Per County\**

County	Graduation Rates
Anderson	95.7%
Blount	93.1%
Campbell	91.2%
Claiborne	92.7%
Cocke	92.4%
Grainger	96.4%
Hamblen	94.4%
Jefferson	95.8%
Knox	91.2%
Loudon	93.4%
Monroe	93.3%
Morgan	99.1%
Roane	93.7%
Scott	92.3%
Sevier	91.3%
Union	92.6%

\*2020 data not available for Morgan County. Used 2019 Graduation Rate.

<https://reportcard.tnk12.gov/districts>



## Postsecondary Education and Training

"The Tennessee Higher Education Commission (THEC) released college enrollment data for the fall 2018 semester, indicating that 221,775 students across the state enrolled in community colleges and public universities for the 2018-2019 academic year. This marks the third consecutive year that postsecondary enrollment has grown across the state, and an increase of 1,656 additional students compared to Fall 2017" (<https://www.tn.gov/the/news/2018/10/10/tennessee-higher-education-enrollment-increases-for-the-third-consecutive-year.html>).

"The College System of Tennessee has seen a growth in enrollment and Tennessee Promise and Tennessee Reconnect participants, as well as the highest graduation rate recorded. Enrollment in the College System has grown slightly, with 88,352 students enrolled in community colleges in the system, according to the preliminary numbers. The College System of Tennessee has also recorded the highest three-year graduation rate in the history of the system. The three-year graduation rate tracks first-time, full-time freshmen through the summer of their third year and counts who graduates. The graduation rate for the 2015 to 2018 group was 23.7 percent, which is a 10.1 percentage point growth from the 2010 to 2013 rate.

While an increased graduation rate is a success, there are still challenges. The graduation rate tracks graduation of first-time, full-time freshman. Many of the students enrolled in community colleges do not fall into that category and there is also a gap in the graduation rate when broken down by race that needs to be addressed." (Kast, M., September 27, 2019, "Tennessee community colleges see highest graduation rate, enrollment increase", Knox News).

The initiative of "Drive to 55," has the goal of equipping 55% of Tennesseans with a college degree or certificate by 2025 through Tennessee Promise and Tennessee Reconnect.

According to preliminary enrollment numbers, the College System of Tennessee also has higher numbers of Tennessee Reconnect and Tennessee Promise participants this year. The number of Tennessee Reconnect students outnumber the number of Tennessee Promise students, with almost 14,700 Reconnect participants and over 14,500 Promise participants. Participants in Tennessee Promise have also become more diverse. The number of black, Hispanic and underrepresented minorities participating in Tennessee Promise in the system have all increased since 2015.

Tennessee Promise is last-dollar scholarship funding designed for Tennessee high school graduates to obtain two years of tuition-free education at any of the state's 13 community colleges or 27 colleges of applied technology. Tennessee Reconnect extends that promise to all Tennessee adults wishing to go to college for the first time or return to finish a degree.

## Rehabilitation and Recovery Efforts

"Tennessee has a total of 23,355 people incarcerated in state and federal prison facilities, a total population larger than that of over a third of Tennessee counties. In the past five years, the incarcerated population in Tennessee state facilities has grown by nearly 5% and continues to be disproportionately black and male.

Three TBR community colleges partner with state or federal prison facilities to offer postsecondary training leading to credentials. In Fall 2018, 183 students were enrolled in community college courses at a correctional facility in Tennessee. Additionally, many of the state's TCATs provide training opportunities for incarcerated Tennesseans. A substantial portion of the incarcerated population participates in some form of education programming at state facilities. For FY2018, there were 15,729 enrollments across all programs. Over half of these enrollments were in Adult Basic Education (ABE) or High School Equivalency Test (HiSET) programs. Another 6,448 enrollments were in vocational programs. A less substantial but growing number of enrollments (421 in 2018) were in college-level programs.

Many of the Tennessee Colleges of Applied Technology work with county correctional facilities to host re-entry training programs. Additionally, several TCAT presidents are currently working with county officials to expand postsecondary opportunities for incarcerated Tennesseans in their service area. A 2014 RAND meta-analysis of existing literature supports this conclusion as the authors found inmates who participate in a correctional education program are 43% less likely to recidivate compared to those who did not participate."

[https://www.tbr.edu/sites/default/files/media/2019/07/PostsecondaryOpportunitiesforIncarceratedTennesseans\\_201903.pdf](https://www.tbr.edu/sites/default/files/media/2019/07/PostsecondaryOpportunitiesforIncarceratedTennesseans_201903.pdf).

ETDD is proud to partner, as the administrative agency, in supporting projects aimed at decreasing recidivism and increasing the workforce by rehabilitating people in the incarceration system. Two of these impactful projects include: 1.) Appalachian Regional Commission Power Grant, "Workforce Development and Reemployment Opportunities Project" that will provide workforce training for Scott, Morgan, Campbell, Fentress counties and four counties in Kentucky working with TCAP, and 2.) Appalachian Regional Commission Grant for Hamblen County working with the Rose Center, to support workforce development/training for women in their jail system.

# Unemployment, Opportunity Zone, Jobs Tax Credit Enhancement

## Unemployment

"Unemployment rates improved across a vast majority of Tennessee in August. Eighty-six of the state's 95 counties experienced lower unemployment according to newly released data from the Tennessee Department of Labor and Workforce Development (TDLWD). Tennessee has a seasonally adjusted statewide unemployment rate of 3.6 %. Nationally, the seasonally adjusted unemployment rate was 3.9 percent for the second consecutive month."

(<https://www.tn.gov/workforce/general-resources/news/2018/9/27/unemployment-rates-drop-in-nearly-all-tennessee-counties.html>)

Table 3: Unemployment Rates per County: 2020

County	Unemployment Rates
Anderson	7.0%
Blount	6.6%
Campbell	7.1%
Claiborne	6.4%
Cocke	9.5%
Grainger	7.4%
Hamblen	7.4%
Jefferson	7.2%
Knox	6.5%
Loudon	6.4%
Monroe	7.2%
Morgan	6.9%
Roane	6.8%
Scott	8.7%
Sevier	8.3%
Union	7.2%

<https://www.tn.gov/content/dam/tn/workforce/documents/LaborEstimates/LaborForceEstimatesAug20.pdf>

## Opportunity Zone

The Opportunity Zone Program is a community development tool designed to drive long-term capital to low-income communities by providing a federal tax incentive for investors to re-invest their capital gains into Opportunity Funds to revitalization in designated low-income areas. Within the ETDD service area, twelve counties qualify with opportunity zone status. These counties and number of census tracts approved<sup>23</sup> include: Roane, Claiborne, Scott, Union (1 each); Anderson, Loudon, Monroe, Cocke, Blount, Hamblen, Sevier (2 each) and Knox (9). Of these twelve counties that have received Opportunity Zone designations, the Opportunity Zones account for 16.1% of all economically distressed areas.

## Job Tax Credit Enhancements

The Tennessee Job Tax Credit Enhancement program provides incentives for companies expanding or relocating to the state and committed to creating new full-time positions. Incentives are available for counties that have been Tier 2, Tier 3 and Tier 4, progressively deemed those with greater economic distresses. ETDD has the highest number of counties statewide (6) classified at the Tier 4 level<sup>31</sup>.

# Employment Clusters

## Employment/Career Clusters

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

- *Education/Training:* Located in Knox County as the flagship state university and medical center, the University of Tennessee is the largest educational employer in the State across its five campuses. Within the ETDD counties, there are approximately ten post-secondary institutions that not only provide career training for the residents, but also provide employment for numerous residents.
- *Health Sciences:* With approximately 23 hospitals, psychiatric and medical centers, as well as numerous research, pharmacology, primary and specialty care practices, the ETDD service area not only benefits from access to quality healthcare, but also has strong employment and career opportunities within this field<sup>16</sup>. The Bureau of Labor Statistics has stated that these jobs are "expected to have the fastest employment and to add the most jobs between 2014 and 2024."
- *Agriculture, Food and Natural Resources:* Farming dominates the State's landscape, with 77,300 farms covering 10.8 million acres, or 41% of the State's 26.4 million land acres. Tennessee ranks eighth in the number of farms.
- *Government/Public Sector and Science, Engineering Technology and Math:* The Department of Energy's impact on Tennessee totaled \$5.6 billion last fiscal year, according to a new study by the East Tennessee Economic Council. Y-12 National Security Complex in Oak Ridge has begun constructing the \$6.5 billion Uranium Processing Facility - the largest construction project in the history of the state - and has been approved for a new \$1.65 billion Lithium Production Facility<sup>20</sup>. Further, the Oak Ridge National Laboratory remains on the cutting edge of new technologies, including their work with the fastest supercomputer in the world. The counties of Anderson, Blount, Roane, Knox and Loudon support the employment needs of these national laboratories, research facilities and technology based companies.
- *Manufacturing:* In 14 of the 16 ETDD counties, skilled production workers have the highest occupation cluster employment<sup>29</sup>.
  - ⇒ Automotive Parts manufacturing, located in virtually all ETDD counties, and Boat Manufacturing, located in Loudon, Knox and Monroe counties provide over 14,000 jobs collectively.
  - ⇒ Furniture manufacturer England, Inc., an independent division of La-Z-Boy Incorporated that has been located in New Tazewell since 1964<sup>26</sup>, will invest \$31 million to expand its operations in New Tazewell, TN. The expansion will create 202 jobs in Claiborne County.
  - ⇒ BMT Manufacturing, a trailer company, plans for to expand their operations into Campbell County, investing a total of \$3.7 million and creating 148 new jobs<sup>25</sup>.
  - ⇒ Takahata will add 13,000 square feet to its existing facility in Scott County and introduce new equipment to meet growing demand. The plastic injection molding automotive manufacturer will invest \$9.7 million and create 81 new jobs in Scott County<sup>24</sup>.
  - ⇒ Oshkosh, a leading designer and manufacturer of specialty vehicles and vehicle bodies, Oshkosh plans to create more than 300 jobs in Jefferson County over the next three years.
- *Food Service, Restaurant Industry:* The restaurant industry accounts for 10% of the employment in the state, over 80,000 East Tennesseans and approximately \$12.2 billion in estimated sales.
- *Hospitality and Tourism:* The Great Smoky Mountains, Dollywood, Ober Gatlinburg and numerous TVA lakes contribute to the profound effect this industry has on the economy of East Tennessee, employing over 550,000<sup>22</sup>.

## Tourism, Environmental, Geographic and Cultural Impacts

### Tourism

Tourism generated 184,300 jobs for Tennesseans, a 3.1% growth year over year. All 95 counties enjoyed an increase in tourism expenditures. Each county saw more than \$1 million in direct travel expenditures in the economic impact of tourism. Two of the five counties that exceeded \$1 billion in travel expenditures are located in the ETDD service area. The five counties are Davidson (\$6.505 billion), Shelby (\$3.503 billion), *ETDD Sevier* (\$2.276 billion), Hamilton (\$1.112 billion), and *ETDD Knox* (\$1.097 billion)<sup>22</sup>. Knox County and Knoxville stand to see an increase in ecotourism with the Great Smoky Mountains nearby and the continued investment in green spaces in the community, including Ijams Nature Center and a flourishing watersports community.

### Opioid Use

The opioid crisis continues to sweep across the nation with catastrophic consequences. Tennessee has had ample experience in dealing with the opioid crisis. The state ranked third in the nation in 2016 for opioid prescriptions dispensed per capita. Tennessee ranks 15th with the highest rates of drug overdose deaths with the majority of those deaths related to opioids<sup>34</sup>. A large share of individuals in Tennessee Department of Mental Health and Substance Abuse Services treatment facilities had opioid-related abuse problems with an estimated \$422.5 million spent on hospitalizations associated with opioid abuse<sup>34</sup>. All opioid-related hospitalization costs have been estimated at \$442.6 million per year, and TennCare costs at \$76.9 million annually<sup>33</sup>.

ETDD has several counties that are ranked in the nation's top 50 for opioids prescribed per capita, using morphine mg equivalents in 2015. These counties included Campbell (3rd), Claiborne (7th), Cocke (20th), Anderson (34th) and Hamblen (44th)<sup>34</sup>. Knox County ranks third in the state for opioid-related deaths. The opioid problem is worse in East Tennessee than anywhere else in the state. East Tennessee's locale is the reason behind these staggering numbers. It is part of the Appalachian region, where socio-economic disparities put people more at risk for addictions according to the National Institute on Drug Abuse. It also is situated on the I- 40/I-75 corridor, putting it at the end of the drug pipeline that begins in Michigan<sup>34</sup>.

Most discussions of this epidemic have appropriately focused on adverse health consequences including addiction, overdoses and mortality. However, one facet of the problem that has received relatively scant attention is the potential consequences for the labor market.

It is possible to show that higher per capita opioid prescription rates lead to higher county unemployment rates, lower rates of labor force participation and diminished employment to-population ratios. Having 1% of the workforce out correlates to \$1.29 billion in lost income<sup>34</sup>. A back of the envelope calculation indicates that a 10% reduction in per capita opioid prescriptions would lead to an additional \$825 million in income for Tennesseans from enhanced labor market participation<sup>33</sup>.

# SWOT Analysis

## Strengths, Weaknesses, Opportunity and Threats

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

**Strengths (S):** Assets and advantages





**Weaknesses (W):** Challenges, disadvantages and shortcomings

**Opportunities (O):** Possibilities for improvements and progress

**Threats (T):** Internal and external factors that could compromise or contribute to regional decline

### 2018-2021 SWOT

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	<ul style="list-style-type: none"><li>• Low cost of living/Affordability</li><li>• Business Friendly/Competitive Labor Costs and Skilled Workforce</li><li>• Location/Transportation/Accessibility</li><li>• Education Initiatives and Infrastructure</li><li>• Federal investment (TVA, National Park, DOE, ORNL)</li></ul>
	<ul style="list-style-type: none"><li>• Rural Services</li><li>• Broadband Access</li><li>• Health Status and Opioid Crisis</li><li>• Unification of Regional Collaborations</li></ul>
	<ul style="list-style-type: none"><li>• Rural Task force</li><li>• Employment Growth Business Recruitment and Expansion</li><li>• Post-secondary Education/training</li><li>• Broadband Collaborations</li><li>• Health Initiatives</li></ul>
	<ul style="list-style-type: none"><li>• Regional Economic Development</li><li>• Rural Services</li><li>• Wages</li><li>• Aging Population</li><li>• Lack of Diversity</li><li>• Workforce Housing</li></ul>

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## 2020 SWOT Updates

### STRENGTHS:

Federal Investment: While not necessarily a new phenomenon, there has been a rise in federal agencies choosing to relocate and invest in East Tennessee. The Department of Energy has continued vested interest in the area, with both Y-12 National Security Complex and Oak Ridge National Laboratory receiving the green light on new construction projects worth billions of dollars. With these investments come new opportunities for employment and further economic development in the region.

### WEAKNESSES:

Rural Healthcare in the Wake of COVID-19: As mentioned in the 2019 SWOT update, numerous rural hospitals were closed, leaving large swathes of rural communities without accessible healthcare options. While the impacts then were quite negative, in the wake of the COVID-19 pandemic these issues are even more concerning. As of 2016, seven of the thirty counties ranked as the worst primary care health resource shortage areas in Tennessee were in the ETDD area. In addition, nine of the ETDD counties were listed as federal medically underserved areas, six were federal medically underserved populations, and one county was listed as a partial medically underserved area as of August 2019. With the rate of hospitalization steadily increasing, this is particularly concerning for rural communities and the more well-served communities that will provide increased services for surrounding areas.

Fall of Tourism in the Wake of COVID-19: In 2019, before the COVID-19 came in full force to the United States, tourism was the second largest industry in Tennessee. The tourism industry brought in \$23 billion in tourism spending for 2019 and the state was on track to break records for tourism in the first three months of 2020. Now, due to the spread of the COVID-19 pandemic, this titan of Tennessee industry is at risk. The U.S. Travel Association has predicted that tourism in Tennessee could see anywhere from a 35 to 45% decline during 2020. For an industry that supports 7.4% of Tennessee's private industry employment and contributed \$75 million in new state and local tax dollars, a loss of that size will undoubtedly have large impacts across the state.

Lack of Broadband Access: While this weakness was contained in the original SWOT analysis, it is important to emphasize how the pandemic has exacerbated this issue. As more businesses and schools transition to an online format, the lack of fast and reliable broadband in the home is even more cumbersome to East Tennesseans. Of the sixteen counties served by the ETDD, fifteen fall below the 90% mark for the percent of households with reliable internet in their home. The lack of internet access is a hindrance for the workforce and for student populations in the ETDD region.

Mental Healthcare and Substance Abuse: While much of the focus around COVID-19 centers on physical health, the pandemic is having profound effects on mental health as well. Increased isolation and stress, not to mention a worsening economy, has many communities feeling the mental and emotional toll of the pandemic. As of 2018, the ETDD area contains three of the thirty worst counties for shortages of mental health providers across the state, including Claiborne,

Grainger and Morgan counties. Across all counties administered by the ETDD, seven counties experienced federal mental health professional shortage across the entire population and nine counties experienced the shortage across the entire low-income population. This lack of mental healthcare access can lead to increased substance abuse, which is troubling especially in the presence of a worsening opioid crisis.

## **OPPORTUNITIES**

Reinventing Tourism: While the COVID-19 pandemic will undoubtedly hurt the tourism industry in Tennessee for 2020, there are many opportunities for future growth in the tourism industry. In the short term, the Tennessee Department of Tourist Development has received CARES Act funding to “remarket the severely devastated industry to aid in its recovery.” There is promise in promoting safe and socially distanced travel, especially in travel destinations in East Tennessee such as the Great Smoky Mountains National Park. In the long term, though, there are even more promising signs for a rebound in the tourism industry. Recent reports show that Americans plan to travel more domestically following the pandemic, especially to national parks and public lands. Given that East Tennessee is home to the nation’s most popular national park, this is an opportunity for the tourism industry to seize on future potential.

Increased Focus and Innovation in Healthcare: The COVID-19 pandemic brought heavy attention to the lack of healthcare access and providers in rural communities. Given the issues with rural healthcare access discussed in the preceding section, it is likely that this increase in attention will bring with it increased motivation to fix these issues. Since the onset of the pandemic, there have been initiatives to increase access with telehealth providers and rural health care funding. These initiatives serve as an excellent jumping off point for future expansion.

Increased Interest on Broadband Expansion: The COVID-19 pandemic has highlighted areas that are weaknesses in East Tennessee. With increased attention on these areas, there is heightened interest in ways to combat these issues and find solutions to these complex problems. Broadband access is no different. With more businesses and school systems relying on internet access for daily life due to the pandemic, there has never been more attention and interest in fixing issues with broadband access in the ETDD area.

## **THREATS**

Strength of Education during COVID-19: With many schools having ended classes early or transferred to an online format during the onset of the coronavirus pandemic, there are concerns about the educational preparedness of students in the ETDD area. The 2019-20 school year was abruptly disrupted and the 2020-21 school year for many districts in the region have been impacted by the pandemic, with some adopting shortened semesters, online formats or hybrid instruction. With these changes, there are concerns that students may not be as prepared or receiving the same quality of education as years past. These impacts on education can have far-reaching consequences on students both academically and socially.



## ***Strengths***

***Low Cost of Living/Affordability:*** Based on second quarter 2018 averages, Tennessee has the 6th lowest cost of living in the nation at approximately 10% below the national average. The state has no tax on income, although there are taxes on investments and dividends. Tennessee state tax rate is 7% when supplemented by local rates that can be as high as 2.75%. On average, the total rate paid by Tennessee residents is 9.46%. The sales tax rate for food and food ingredients is 5%<sup>37</sup>. There are no taxes on prescription drugs or retirement income. Across the 16 ETDD counties, the average home price is \$134,832<sup>36</sup>. All 16 ETDD counties have a cost of living rate lower than the national average<sup>36</sup>.

***Business friendly environment with Education aligned to producing Skilled workers:*** Tennessee continues as the No. 1 state for job growth among small businesses, according to data collected by the nation's biggest payroll provider, Paychex. A skilled worker is any worker who has specialized knowledge and acquired abilities who can be immediately placed in employment situations with little, to no, additional skills training. The number of post-secondary completions has increased by 14.5% during the same period. The percentage of Tennesseans, age 25-64, with an Associate's Degree or higher increased from 29.9% to 35.7% from 2006-2016. This 5.8 percentage points ranks Tennessee #5 in the nation. In addition, the number of Tennesseans with a Bachelor's Degree or higher increased by 5.1% over this same period<sup>38</sup>. Tennessee Promise and Tennessee Reconnect are pioneering programs being recognized nationwide as a proven strategy to impact workforce development.

***Transportation:*** Home to the 2nd busiest cargo airport in the world, 3rd largest rail center in the US, the nation's 5th largest inland port, and 1st in the southeast for trucking, courier and messengers sector employment, Tennessee is conveniently accessible within a day's drive to a majority of US markets. The Tennessee River provides southern access to the Tennessee- Tombigbee waterway and western access to the Mississippi River, both of which provide access to the waterways of the world. The transportation network within ETDD has three major interstates (I-40, I-75, I-81). McGhee-Tyson Airport, located in Blount County, is the premier air facility in East Tennessee. With parallel 9,000 foot runways, McGhee Tyson Airport can accommodate any size aircraft in today's inventory. McGhee Tyson Airport has five major airlines serving 21 non-stop destinations. The Tennessee Air National Guard's 134th Air Refueling Group operates out of McGhee Tyson Airport.

"Plans for the long-awaited Oak Ridge airport have continued to progress in recent months, and leaders of the project are gaining confidence that the town could have a general aviation airport in the next two years if plans fall into place as hoped... As it currently stands, plans call for a 5,000-foot runway, a partial parallel taxiway and about 40 hangars on 171 acres that was acquired from the Department of Energy. Metropolitan Knoxville Airport Authority, which oversees McGhee Tyson Airport and Downtown Island Airport, is managing the project" (Whetstone, T., January 15, 2019, "Long-awaited Oak Ridge airport could break ground in 2020", Knoxville News Sentinel).

## ***Weaknesses***

***Rural Services:*** "Many of the state's rural areas are not sharing in the success of their urban counterparts. Based on rankings of unemployment rate, per capita market income and poverty rate, 17 of Tennessee's counties, all in rural areas, are in the bottom 10% of the nation with an additional 35 counties ranking in the bottom 25%. With more than half of our ETDD counties are in the bottom quarter of the country in economic indicators, thus our rural areas struggle with building capacity for key functions and developing their local assets to create thriving communities"<sup>40</sup>. From community infrastructure capacities, recruitment of highly qualified teachers, healthcare services, business/corporation recruitment and workforce skills development, the rural communities are vastly in need of support.

Eleven of the 16 ETDD counties are defined as Rural. Nine ETDD service counties have been identified by the Tennessee Housing Development Agency as Targeted Areas of chronic economic distress and have allowances to promote homeownership in these areas<sup>41</sup>. Seven ETDD counties have been identified as a Federal Health Professional Shortage Area for mental health services, with the remaining nine ETDD counties identified as lacking mental health services countywide for the low income residents<sup>42</sup>. Fourteen ETDD counties have been identified Federal Health Professional Shortage Areas for primary care countywide for the low income residents, with the remaining two counties (Cocke and Union) lacking primary care services for all residents<sup>43</sup>.

***Health Status:*** Tennessee has the 5th highest adult obesity rate in the nation<sup>47</sup> with consistent distribution of the percentages of adults within the rural, suburban and urban area being obese. African Americans present with a much higher prevalence of obesity than their white or Latino counterparts. Yet, the more alarming trend is the fact that Tennessee children are now the heaviest kids in the nation. Thirty-eight percent of Tennessee kids are either overweight or obese. The new rating is a distressing milestone in Tennessee's obesity crisis, which threatens the long-term health of the state<sup>46</sup>. Preventable chronic diseases directly related to obesity are cumulative and present added issues of healthcare costs and needs, as well as lost productivity. The rural, urban and suburban geographic regions of the state have similar percentage rate of obesity, yet the significant concern for treatment of the associated chronic diseases caused and correlated from obesity is for the rural population. These areas experience the most significant medical professional shortages and have some of the highest rates of uninsured.

***Broadband Access:*** ThinkTennessee and the Center of Rural Strategies' report states that "roughly a quarter of Tennessee's rural families are without any kind of broadband access, while 23% of the total population reports that they lack a high-speed internet subscription". One in four rural families live in areas without access to broadband. The East Tennessee Development District service region has the highest number of counties statewide that fall into the data category reflecting up to 50% of the population lacks access to broadband service. These ETDD counties include Grainger, Union, Jefferson and Monroe. Though progress is being made by the Tennessee Broadband Accessibility Act, the brief finds that thousands of Tennesseans, especially those in rural areas, do not have access to broadband internet. Further impacts include, many who live in these areas where the service is provided, cannot afford it. Even where broadband is available, a quarter of all households and nearly half (49.6%) of the poorest Tennesseans (<\$20,000 annual income) do not have a broadband subscription.

The cost of subscription is a key barrier for low-income Tennesseans, as 81% of those with incomes below \$30,000/year cite affordability as a main concern in adopting internet service. This fiscal fact could have significant impacts for the residents in the 9 of the 16 ETDD counties as the median household income reported by the Census Bureau has historically been in the \$30,000 range with poverty levels, above the state average, ranging from 15%-25% in 11 of the ETDD counties<sup>39</sup>

## ***Opportunity***

***Rural Initiatives:*** In alignment with the statewide mission of the Rural Taskforce<sup>40</sup>, ETDD collaborates with our rural counties to create opportunities that build stronger infrastructures to improve economic and workforce development, digital infrastructure, entrepreneurial opportunities and asset-based economic activities. Improvement in these above areas will also have beneficial efforts on the local education systems, teacher recruitment and school capital funds. Supporting rural healthcare development initiatives that targets community-based health resources has significant opportunities to grow, especially in our shortage and distressed counties. The crisis of shortage of primary care and mental health care in the rural communities has the opportunity and priority need to align impactful capacity alliances to resolve.

***Employment Growth- Business Recruitment and Expansion:*** Within the ETDD region are many world-class recreation facilities and destinations including the Great Smoky Mountains National Park, the Cherokee National Forest, Dollywood, and six TVA lakes. These facilities attract well over 11 million visitors per year. Every county in the state saw more than \$1 million in direct tourism impact, but only five counties topped \$1 billion with Sevier at \$2.3 billion followed by Knox at \$1.1 billion<sup>48</sup>. "Tourism pays the bills, but also strains roads, police and wastewater infrastructure" (Leon Downey, ED of Tourism Dept.). Further, two large potential ecotourist hubs, Cumberland Gap National Park and Big South Fork National River and Recreation Area, are underutilized and could bring in even more tourism revenue in the coming years. East Tennessee has many opportunities to continue to prosper and expand the tourism industry.

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

***Broadband:*** The think tank and officials with the Center for Rural Strategies also think policies like the "dig once" approach can help expand broadband connections while reducing the cost for the infrastructure. The strategy calls for utilities to coordinate road construction and other infrastructure improvements with broadband installation<sup>38</sup>.

***Healthy Initiatives:*** In alignment with the Healthier Tennessee<sup>49</sup> movement, many ETDD's service counties have already been recognized as Healthier Tennessee Communities. This recognition, to prioritize preventable health efforts, has been awarded to Blount, Anderson, Hamblen, Roane, Sevier, Loudon, and Jefferson counties<sup>50</sup>. There are many opportunities for ETDD counties to be recognized for supporting their communities, workplaces, campuses and residents to participate in healthier lifestyle choices.

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## ***Threats***

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

Tennessee wages still averaged nearly 12% less than the U.S. average wage rate of \$25.76<sup>38</sup>.

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

Population migration: Population increases are anemic at best in most of ETDD's rural counties. Five counties had a negative growth rate the last three year comparison. The lack of employment opportunities is a major reason for the outmigration of people, especially young people.

A lack of jobs and a lack of well-paying jobs causes skilled workers to migrate to wherever good jobs are to be found. This is a particular problem in rural areas as young people leave to acquire training/education and simply never return to their home county to establish residency. '

Ageing Population: Tennessee Commission on Aging and Disability (TCAD) conducted a statewide survey of both older adults and their providers. Currently, the two main challenges to meeting the needs of the ever-increasing aging population are financial constraints and lack of program capacity to meet current and future demand. The long-term challenge will be the ability to keep up with the increasing demand for programs and services with stagnant or decreasing resources<sup>51</sup>. This strain on the ability to provide adequate resources will be most felt in the rural communities where services are already limited or non-existent. ·

Sevier (32%), Blount (30%), Union (30%), Jefferson (29%), Grainger (26%), Knox (27%), and Loudon (26%) are expected to have the highest percentage growth in the number of individuals ages 65+ between 2019 and 2030<sup>52</sup>.

# Strategic Direction

## ETDD Vision statement

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

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

Any modifications, updates or additions to the Goals and Objectives for 2019 by the CEDS Committee are underlined.

## Goals and Objectives

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

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

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

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

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

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

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

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

**Goal 5: Support small business development and entrepreneurial business development**

- Objective A: Provide financing for the development and expansion of small businesses
- Objective B: Develop sources of micro-loan financing for start-up business, especially those of minority and women entrepreneurs
- Objective C: Administer micro loan program targeted at the development and expansion of agribusinesses in the ETDD region

**Goal 6: Focus on technology driven economic development opportunities**

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

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

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

# Evaluation Framework

## *Performance Measures Status*

The following performance measurements are the five-year goals of ETDD's strategy. **The update of the 2018 status of progress to achieve these five-year goals is identified under each category is included.**

1. **Job creation:** It is expected that the implementation of the CEDS will result in the creation of 750 new, state average wage level jobs within the region on an annual basis.
  - **2018: 773 new jobs**
2. **Job retention:** It is expected that the implementation of the CEDS will result in the retention of 500 existing jobs within the region on an annual basis.
  - **2018: 16 jobs retained**
3. **EDA investments:** It is expected that the implementation of the CEDS will result in three new EDA investments that relate specifically to the strategic objectives developed for the ETDD region. Each EDA investment is estimated to be in the \$600K range and will be matched by local investments of \$600K per project.
  - **2018: Three (3) new EDA investments; Investment total is \$9M**
4. **Private investment:** It is expected that the implementation of the CEDS will result in the location or expansion of seven (7) industrial companies in the region. Total private investment is expected to be in the range of \$100M to \$120M on an annual basis.
  - **2018: Expansion of six (6) industrial companies; Total private investments \$483M**
5. **Small business development:** It is expected that the implementation of the CEDS will result in the approval of twelve (12) new loans for small businesses in the region. Total loan investment will be in the range of \$200,000 per project and private investment will be in the range of \$250,000 per project.
  - **2018: Four (4) new loans for small businesses; \$4M per project and \$500,000 private investments**
6. **Change in the economic environment:** It is expected that the implementation of the CEDS will assist the region to achieve parity with the State and the nation in terms of per capita income levels. Performance will be measured by an annual assessment of the gap between individual county levels and state/national averages.
7. In conjunction with the State of Tennessee, provide action-oriented, short-terms and long-term goals for economic development for two counties in the region.



# Economic Resilience

## *"Steady State Initiatives" Action Plan*

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

### ***"Steady State Initiatives" Action Plan (Cont.)***

- Utilize ARC funding to prepare a high-speed broadband infrastructure development plan for Campbell County
- Promote sustainable development practices at the local and regional level
- Utilize data provide by Retail Strategies to provide assistance in the recruitment of commercial establishments into at least five counties
- Monitor and implement the Comprehensive Economic Development Strategy (CEDS) for the ETDD region on an annual basis through 2020
- Join the collective efforts to impact the opioid crisis in East Tennessee and the nation

### ***"Responsive" Initiatives***

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

Focus on the issue of economic resilience and acquire funding for a prototype recovery plan for one rural county in the District

Assist one local government with the acquisition of pre-disaster grant funds from the US EPA  
Provide professional local planning services to up to 38 local planning commissions in the region

Educate local planning commissioners on the National Flood Insurance Program and the impact of development within flood zones and sinkhole prone area

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