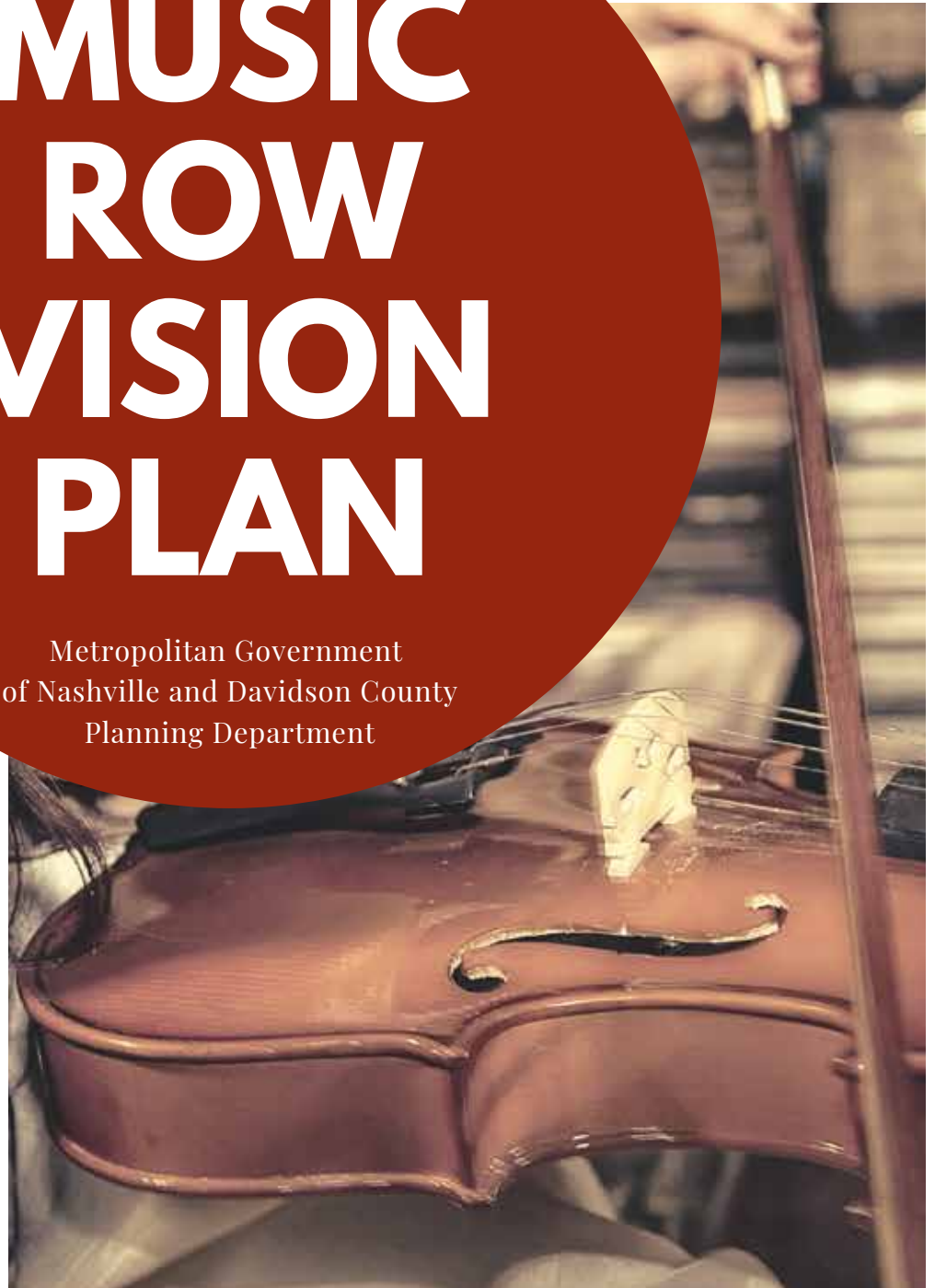




MUSIC ROW VISION PLAN

Metropolitan Government
of Nashville and Davidson County
Planning Department







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Foreword

Nashville wears the title **Music City U.S.A.** with pride and a big ol' dose of glitz and glamour. Our city thrives on a reputation of creativity, hospitality, and success. The heart of these ideals and identity is Music Row, a place unlike any other in the world.

Over the last four years, Metro Planning staff has worked closely with community members, music industry leaders, and other stakeholders to create the *Music Row Vision Plan*. This document identifies the significance of and pressures facing Music Row, and contains a broad range of recommendations and action steps to pursue. The overarching theme of the Vision Plan is to ensure that Music Row continues to be a vital hub of music business and innovation, and a unique creative cluster within our city.

The Planning Department has undertaken extensive qualitative enquiry and quantitative analysis in order to develop this plan. *The Music Row Business Survey*, an in-depth survey undertaken in the winter of 2018/19, provides an understanding of the challenges and priorities of Music Row businesses. Changes to production, technology, and the overall economy have made significant impact on the industry. Some sceptics may claim that music business is nonexistent on the Row, but data say otherwise.

Over two hundred businesses on Music Row were interviewed, face to face, from an estimated 415 businesses. Our interviews verify that songwriters, musicians, singers, recording studios, licensing firms, publishers, and a host of others – everyone involved in turning an idea into a song – are housed within blocks of one another. The music industry accounts for nearly ten billion dollars of value in our region annually, and the core of this value is on the Row. This quantitative data verify that music business is alive and thriving on the Row, and lay a foundation for the recommendations in the Vision Plan.

While data support the quantitative aspects of Music Row, it is the stories, people, and place that provide the atmosphere felt by everyone who walks the Row. For decades, stars and artists have said, "I got my start on Music Row." This rich tradition is what draws people to Nashville, and makes our city unlike any other in the world.

There have been fierce debates about the future of the Row, bolstering the conviction that now is the time to move beyond discussion and create a plan of action that can balance many interests. *The Music Row Vision Plan* provides the roadmap to the shared future of the Row. It is a planning document, but it is much more! The plan is a call to action for the public and private sectors, neighbors and developers, and all those who want to support and strengthen the Row.

The Steering Committee has been vital to the creation of the Vision Plan. The Planning Department is extremely grateful for the generous support and expertise of this committee. We thank them all for their long-term commitment and support to ensuring that Music Row continues to be a place rich with talent, energy, and opportunity.

Just like the Opry's center spotlight is on the artist, the spotlight of the world is on the business, creativity, and innovation of Music Row. We hope you see the quantitative and qualitative value of the Row, and will work with us to implement the ambitious objectives of the Music Row Vision Plan.

In celebration of the future of Music Row,



Lucy A. Kempf
Executive Director, Metro Nashville/
Davidson County Planning Department

“ Unlike the exile's
mother, in whose
favored hand
a beacon shined,
My symbol plays a
siren's song from
outstretched limbs
entwined, With joyous
rhythm and handmade
rhyme, a joyful noise
when hearts align.
Bring me your creative
loving souls to find,
this hallowed ground
still Enshrined. ”

– Jim Ed Norman,
the “Mayor of Music Row”

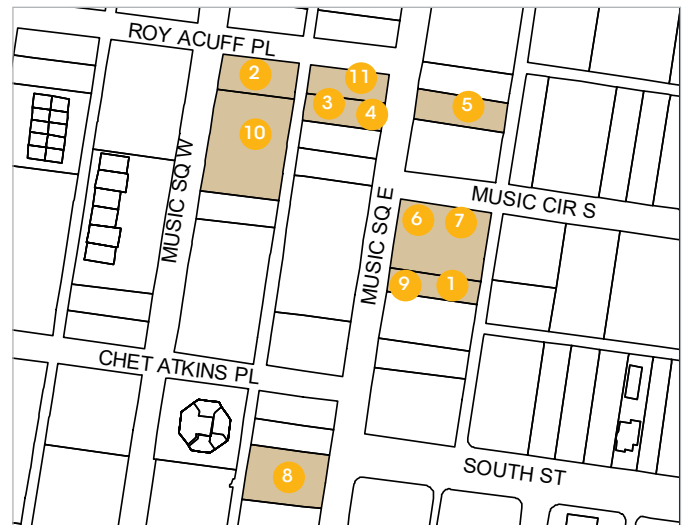


Significance

The Beginnings

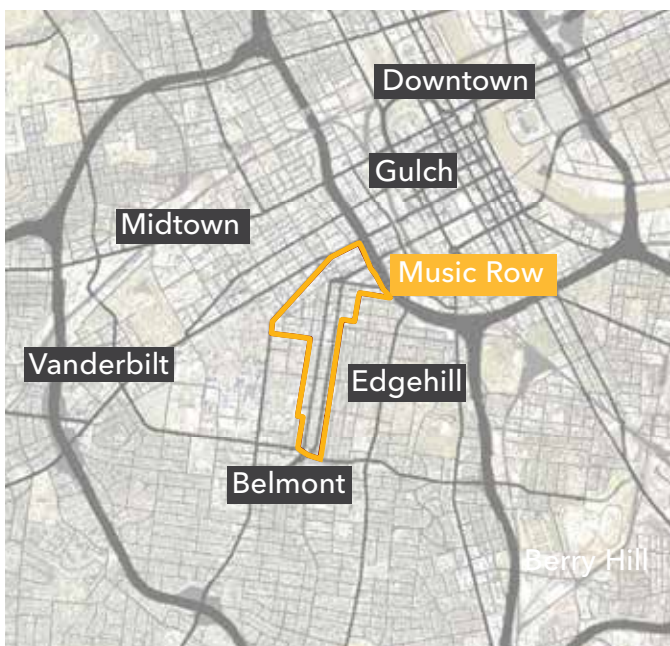
Nearly 100 years ago, WSM-AM Radio launched the Grand Ole Opry, a weekly country music stage concert broadcasted from Downtown Nashville. After twenty-five years on air, WSM announcer David Cobb christened Nashville "Music City U.S.A.". By the 1950's, the city was becoming known as the exclusive home of country music, although Nashville was traditionally home to many other genres including blues, R&B, gospel, and pop.

Just outside of downtown, at 804 16th Avenue South, Owen and Harold Bradley bought a house for \$7,500 and converted it into a recording studio in 1954. The Bradley brothers, Chet Atkins, and other visionaries realized early on that this inexpensive little neighborhood could form the heart of the music industry, not just in Nashville but worldwide. By 1957, the Bradley's and the RCA Studios, Decca offices, and Cedarwood Publishing formed a tight little community now known as Music Row. This unique concentration of recording studios, record label offices, licensing firms, and broadcast operations set the stage for one of the most significant geographic districts that would shape a global cultural trend.



Record labels and music businesses continued to emerge in the early 1960's.

1. Quonset Hut - 1955
2. RCA - 1957
3. Decca - 1962
4. MCA - 1966
5. Gra-Mar / Gold Standard / Billboard - 1962
6. SESAC - 1964
7. Capitol Records - 1965
8. Tree International Publishing - 1964
9. Columbia - 1965
10. RCA Victor Studio A - 1964
11. CMA - early 1960's

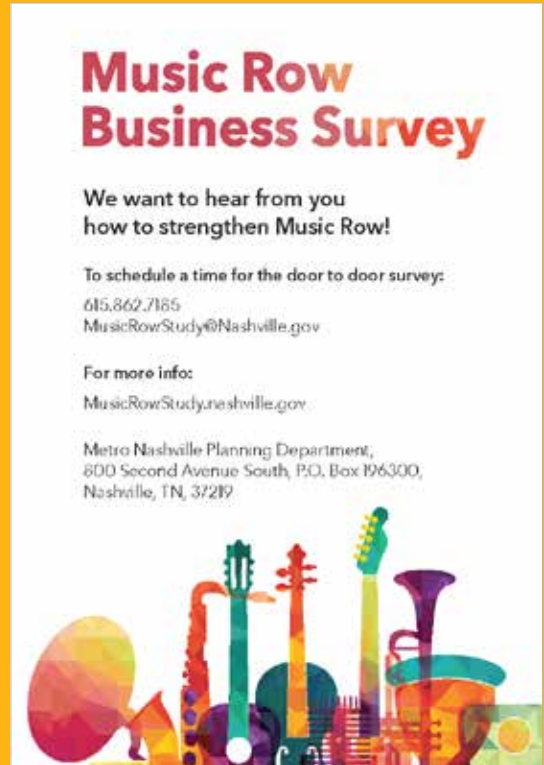


Owen and Harold Bradley's converted house at 804 16th Avenue South established the first music-related business on Music Row in 1954.

A True Industry Cluster

When music-related businesses were co-locating along Music Row for convenience, collaboration, and community, they formed a true industry cluster of music and entertainment. Industry clusters are arrays of like and related businesses in a geographic setting. New York City's theater district is another famous example. Today Music Row is one of the largest and most dynamic industry clusters in the world.

Through geographic clustering, similar businesses developed and thrived together, enabling the music industry to rise over many decades without the need for government support or incentive. You can write, produce, record, release, and promote an album without ever leaving the Row. According to the Music Row Business Survey, in 2019 approximately half of the businesses on Music Row are music-related, made up primarily of artist management, publishing, and recording and production studios. Almost all of the music-related businesses said it is important to be located on Music Row, and cited the cluster, history, visibility, and atmosphere as their reasoning.



Music Row Business Survey

Metro Planning, in collaboration with Bloomberg Associates and Middle Tennessee State University's Department of Recording Industry, conducted a door-to-door survey to gain an understanding of the challenges and priorities of Music Row businesses. The analysis included over 200 responses with business owners and managers sharing their thoughts in person, online and via phone.



Campus-like Atmosphere

Three-quarters of the businesses surveyed engage with others on Music Row, and 37% engage with the music industry or artists specifically. With songwriters, producers, technicians, and other music industry professionals walking to meetings and sessions or doing lunch, Music Row feels a lot like a college campus. The residential character provides a haven for publishers and others that host creatives to write lyrics and music. The streets, front lawns, open spaces, and landscaping form an inviting setting for collaboration. This “sense of place” majorly influences how social interactions occur, how people move about the area, how safety and security are perceived, and how the physical environment contributes to the inspirational aspect of being on “the Row.”

The Planning Department analyzed the physical arrangement of Music Row and identified five characteristics instrumental to the success of the cluster and essential to maintain:

Land Use Organization: the arrangement of music industry, business services, restaurant, retail, and residential uses throughout the district

Compactness: the density of the cluster and maintenance of existing boundaries

Connectivity: the degree of street, alley, and pedestrian network connectivity within the cluster, as well as to the surrounding community

Configuration: the strength of the structure of the district, with increasing development intensity from south to north

Greenness: the amount of lawn, landscaping, and trees

According to these characteristics, Music Row can be described as a mixed-use, compact, well-connected, well-structured, and green business district.



85%

of businesses surveyed interact on some level with other businesses on Music Row



49%

of businesses that collaborate on the Row do so with music-related businesses

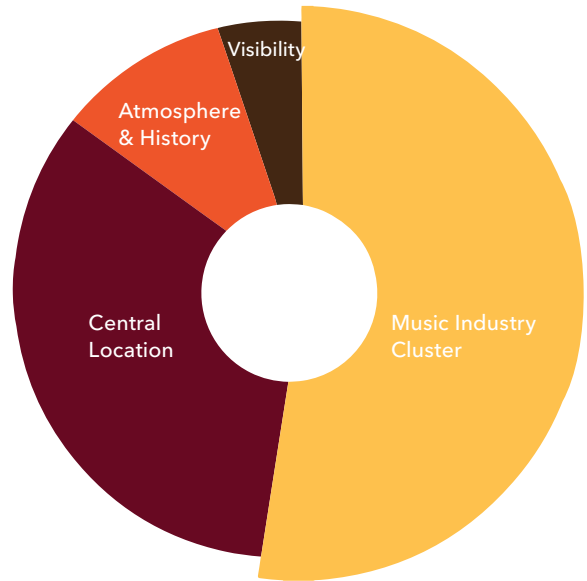
Economic Impact

According to the Nashville Area Chamber of Commerce's Cluster Analysis (2013), the Nashville Region's music industry is valued at \$9.7 billion annually. This represents 56,000 jobs created and sustained through direct, indirect, and induced economic effects. Nearly half of those jobs are arts, entertainment, and recreation jobs. Furthermore, 8,308 people were directly employed in the Music Industry in the region, with Music Row at its heart.

The Music Row Business Survey gives a glimpse of the specific economic impact of Music Row. The research revealed that there are currently 199 music-related businesses on the Row responsible for almost half of all the jobs in the area. Although this number indicates the significant impact Music Row has on the broader Music Industry, it does not account for the unknown number of musicians, song writers, and music professionals who work alongside those employed directly by Music Row businesses.

Nashville's music industry has also experienced recent success in the realm of tourism. Nashville's post-recession boom brought significant new national attention. This attention, along with the debut of the television program Nashville in 2012, has helped promote the city as a destination for tourists from all over the world. Today, visitors explore Music Row through a variety of tours, including Let's Go Travelin' Tours, America's Old Town Trolley Tours, and SongBird Tours. The Country Music Hall of Fame and Museum sponsors tours of RCA's Studio B, which hosts over 900 groups and many individual visitors each year.

Importance of being located on Music Row (music-related businesses only)



\$9.7

billion dollars in estimated annual value of the music industry in Nashville–Davidson–Murfreesboro–Franklin, TN Metro Statistical Area



63%

of survey respondents claim at least some portion of their business is music-related



199

estimated number of businesses with majority music-related operations




RCA's Studio B in Music Row

Purpose of the Plan

Building on Music Row's iconic past, this plan establishes direction for the future, while allowing the cluster flexibility to meet the ever-changing needs of the music and entertainment industry. The purpose of the Music Row Vision Plan is to guide and inform the preparation and consideration of implementation tools and development proposals.

After exploring the pressures threatening the creative cluster, this document outlines tools and policy recommendations that address those pressures and will allow Music Row to continue to be a dynamic, thriving, creative business community for generations to come.



“9 to 5, yeah they got
you where they want
you There's a better
life, and you dream
about it, don't you?
It's a rich man's game
no matter what they
call it And you spend
your life puttin'
money in his wallet.”

- Dolly Parton
Recorded at RCA on Music Row

Pressures

An Ever-evolving Industry in a City on the Rise

Despite its prominent role in the music industry, Music Row faces a loss of the very businesses that define it. As a whole, the music industry's traditional base revenue source, the purchase of record albums, eroded with the release of Napster in the late 1990's and more recently with the advent of music streaming services like Spotify. National recorded music revenues dropped from \$14.3 billion to \$7 billion in 2008, according to the Recording Industry Association of America. Currently, the industry is rebounding at \$9.8 billion by focusing on nostalgic vinyl fans, digital releases, and subscriptions. Additionally, technological advances like the rise of professional quality home recording lower barriers and costs for artists.

Widespread economic change has impacted the Nashville region as well as the music industries it houses. Since the Great Recession ended in 2009, Nashville's economy and population have boomed

unlike any period of time post-World War II. Explosive growth in residential, office, and retail development is most common in neighborhoods near the urban core, notably the Gulch and Midtown which flank Music Row. Outside of the music industry's evolution and Nashville's boom, we must understand the specific factors that threaten this unique business neighborhood. Through extensive community outreach, involvement, and analysis the following issues have been identified as contributing to the degradation of Music Row's creative cluster:

- Loss of Notable Character
- Challenges to Preservation
- Increasing Land Values
- Outdated Office Space
- Intrusion of Multifamily
- Prohibitive Zoning for Third Places
- Insufficient Infrastructure



Loss of Notable Character

Many historic structures on Music Row are instrumental to telling Nashville's music story. The National Trust for Historic Preservation spearheaded an effort to survey Music Row history from 1895 to present. This research document, called a National Register of Historic Places Multiple Property Documentation Form (MPDF), was approved by the National Park Service and includes an inventory of more than 400 properties. The MPDF documents 65 properties on Music Row that are eligible for the National Register. These properties meet all the standards of the National Register but have not been officially listed with the National Park Service. Included are buildings notable for significant architecture, others for cultural importance, and some for both. While there is general consensus among stakeholders that the preservation of key historic properties is essential to the future of Music Row, actions toward National Register or local designations have not been pursued by many property owners.

Music Row and its historic buildings have been included on Historic Nashville Inc's Nashville Nine list of the city's most endangered historic places every year (except 2017) since 2014.

Among Demolitions...

53 occurred between 2010 and 2018

43 were music-related buildings, according to the National Trust for Historic Preservation

23 made way for new developments permitted by Specific Plan (SP) rezonings



Structures along 19th Avenue demolished in 2016



Structure prepped for demolition on Music Row

Demolitions on Music Row since 2010



- Demolitions Since 2010
- Current Building Footprints

Demolition of Existing Structures

Approximately **53** buildings were demolished on Music Row between 2008 and 2018.

Nearly **70%** of demolitions took place north of Grand Avenue and west of Music Square East. Many (23) of these demolitions were completed to make way for new developments permitted by Specific Plan (SP) rezonings. The SP zoning district creates site-specific development standards for individual properties and is intended to implement the General Plan. According to the National Trust for Historic Preservation, **43** music-related buildings were demolished within that **10-year period**.

The proximity of demolitions and new SPs to music-related uses puts added development pressure on the creative cluster.

Challenges to Preservation

The requirements of the building code are commonly perceived as cost-prohibitive to making renovations to and reusing historic buildings. Survey respondents also mentioned difficulty navigating the permit process as a deterrent to rehabilitation. Whether or not existing code requirements and processes make it difficult or even impossible to renovate or adapt an older building, there is certainly an assumption that they do. In many cases, rehabilitation is deemed economically infeasible, and long-time owners sell instead.

The sale and planned demolition of the renowned RCA Studio A in 2014 made apparent the lack of incentives to encourage the preservation of historic resources on Music Row. The federal tax credit for historic preservation allows program participants to claim 20% of eligible improvement expenses against their federal tax liability. However, Tennessee is one of just 15 states without a state historic tax credit. Owners of historic properties on Music Row remark that the federal tax credit is not enough to incentivize rehabilitating older buildings compared to the high value of their land.

Various News Headlines

Face Lifting Due for Record Row

By ELTON WHISENHUNT

NASHVILLE — A proposed \$30 million urban renewal project which will cut through the heart of Nashville's famed Record Row—16th Avenue, South—will require several major music and record companies to relocate.

Charles Hawkins, director of urban renewal for Nashville Housing Authority, said last week if present plans are approved his department will begin acquiring land on 16th next summer.

"We will give the people who have to move time to relocate," he said. "It will take several years to execute the entire project."

The plan involves demolishing buildings on the west side of 16th Avenue, South, and building a modern, tree-lined, six-lane boulevard to run parallel to the east side of 16th. The east side of 16th will remain and 17th will become a service street.

The music industry operations on the west side of 16th, which

tions, Inc. (which includes Philips and Sansa), 905 16th.—Tree Publishing Co.

Some of the above are known to be scouting for land for a new building, or have tentative plans for new quarters in buildings planned for construction.

Bought Land

Hill & Range has already bought land on 17th. The Country Music Association will have an office building, Country Music Museum and Country Music Hall of Fame, on 16th at Division, which will be next to Broadcast Music, Inc., on the east side of 16th. Tentative plans are for construction on the \$300,000-plus project to begin next March and take five months for completion.

The music industry buildings on the east side of 16th will remain. These include Columbia Records recording studio, BMG the Hubert Long Building, which includes his talent agency, as houses Capitol Records, and number of other operations office suites.

Local and Federal governments have been at work on planning of the project for years. The planned six-lane boulevard which will replace the west side of 16th will feed into Interstate 40.

As a result of the urban renewal project, the local music and record industry is on the threshold of a vast building expansion era which will diversify the present Record Row into an ultramodern industry center in coming years.

Sinatra Catalog Seen Gushing in \$2.5 M

Mike Curb Foundation buys Buddy Lee Attractions building

, nrau@tennessean.com 7:14 p.m. CST December 4, 2015



Hoteliers buy landmark Music Row building

Aug 26, 2015, 2:22pm CDT Updated Aug 26, 2015, 5:14pm CDT



Enlarge

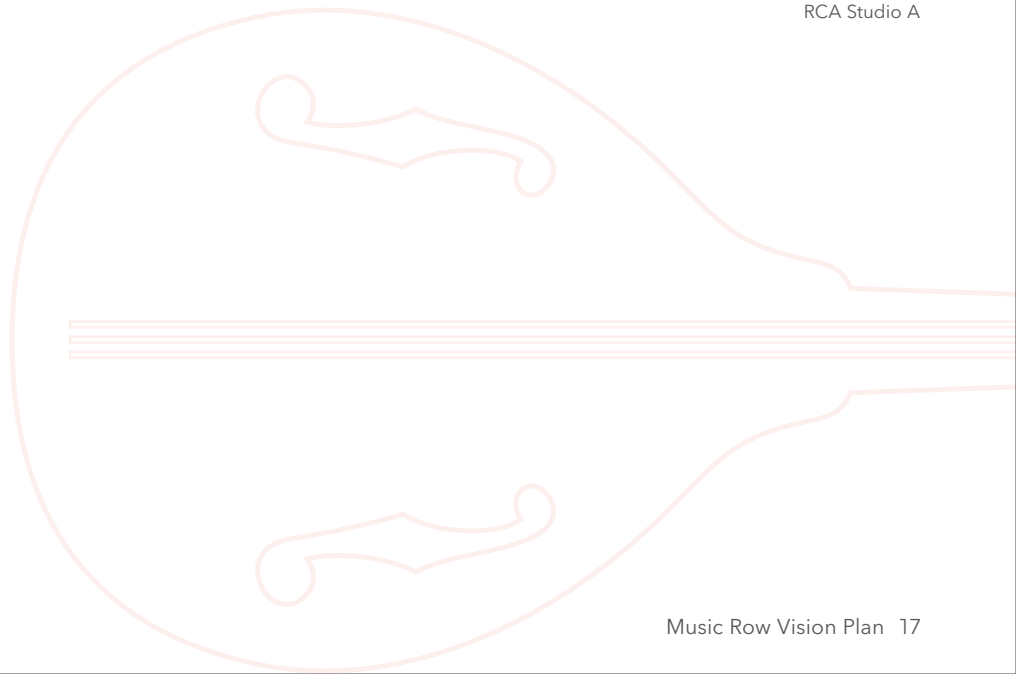
Music Row buildings sold for \$1.32 million

, gward@tennessean.com 3:22 p.m. CDT August 28, 2015





RCA Studio A



Increasing Land Values

The most common challenge music-related businesses face in order to remain on the Row is affordability. Between 2010 and 2019 the property values on Music Row increased by 176%, nearly two-and-a-half times that of Davidson County as a whole and just trailing Downtown at 228%.

Rising property values eliminate one of the key factors in Music Row's success—its affordability. Businesses that rent on Music Row experience rental rate hikes as property values increase. Consequently, Berry Hill has emerged as a secondary music industry node in Nashville. Music-related businesses migrate to Berry Hill because the smaller-scale built environment is conducive to the creative process, similar to Music Row; however, property values are eight times less per acre.



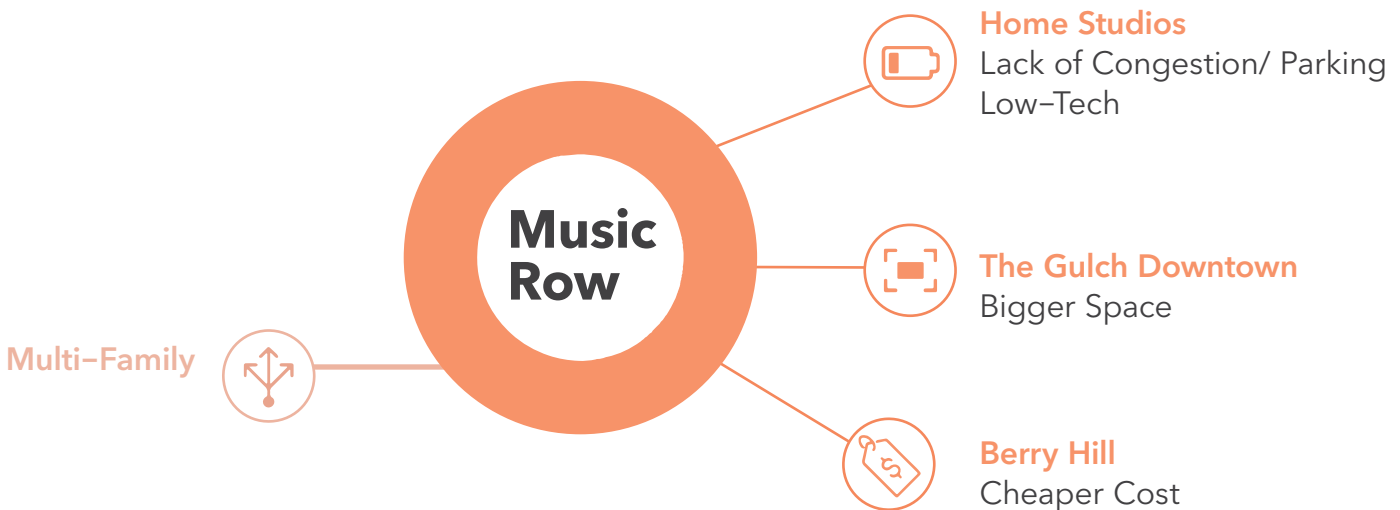
Blackbird Studios, along with many other music businesses, in Berry Hill



2018 - Williams Fine Violins relocates to Donelson



Business migration away from Music Row



Outdated Office Space

The interplay between major record labels and larger music-related businesses located near smaller, creative spaces bolsters Music Row's successful creative cluster. Some of these influential music industry businesses have left the Row in recent years, such as Universal Music Group, Sony Music Nashville, and Sony/ATV Music Publishing.

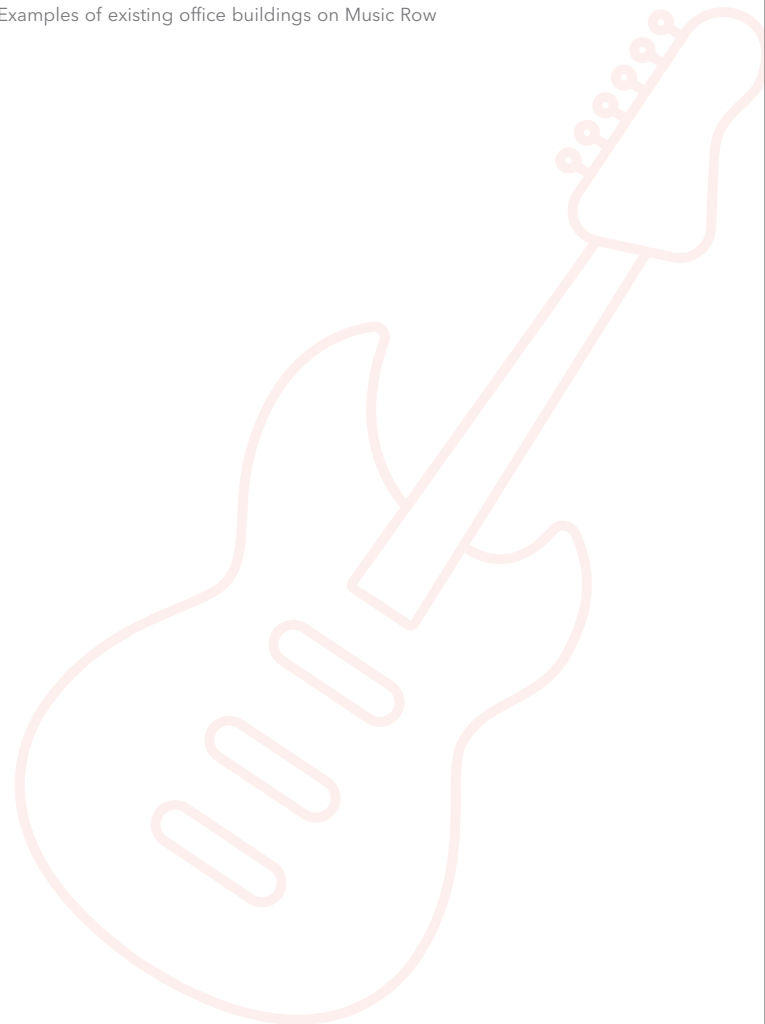
Without the necessary space to expand, they desired newer, more efficient offices and common spaces for their employees. For the purposes of this plan, Class A office buildings shall be defined as buildings containing a minimum of 50,000 square feet of office uses, state-of-the-art technology capabilities, high-tech security, the latest in efficient, and quality architectural design and materials. Corporate music industry users need buildings with larger floor plates, efficient design, and open collaborative environments, currently scarce on Music Row. Due to the high property values, it makes more financial sense for property owners to sell land and move into a suitable building outside of the Row than to expand or build new on the Row.



Examples of existing office buildings on Music Row



2017 – Sony Music Nashville's headquarters relocates to The Gulch



The relationship shared between small and large businesses on Music Row



Small-Scale Office & Creative Space

- Recording and production studios
- Equipment & instrument repair
- Vocal studios or music lessons
- Artist and music management
- Trade associations and unions
- Finance, marketing, & law
- Technology & software
- Music publishing
- Merchandise

Value

- High-value music production
- Creative value and collaborative culture
- Synergy of colocation



Large-Scale High Quality Office Space

- Performance rights organizations
- Class A office space
- Anchor tenants
- Broadcasting
- Major labels

Value

- Exposure of major international labels & international scale
- Access to multi-billion dollar industry and shared resources
- Professional services like publishing, managing, & copyrighting



Intrusion of Multi-Family

Recent multi-family development on Music Row has significantly degraded the vibrant creative cluster. From 2010 to 2018, 3,274 residential units have been constructed in the area. Large-scale apartments, flats, and luxury condos exacerbate the infrastructure and affordability obstacles already constricting the creative cluster. For the purposes of this plan, “large-scale multi-family residential development” is defined as any development located on development sites greater than ½-acre, containing more than 20 residential units, and regarded as the primary use on the site. The

imminent arrival of new corporate relocations with 6,000 jobs in Downtown Nashville will drive continued pressure for housing near the urban core.

Multi-family intrusion reduces opportunities for music-related businesses within the district by impacting affordability. Additionally, conflicts arise between residents and business uses, specifically the watering holes and third places crucial to Music Row’s atmosphere.



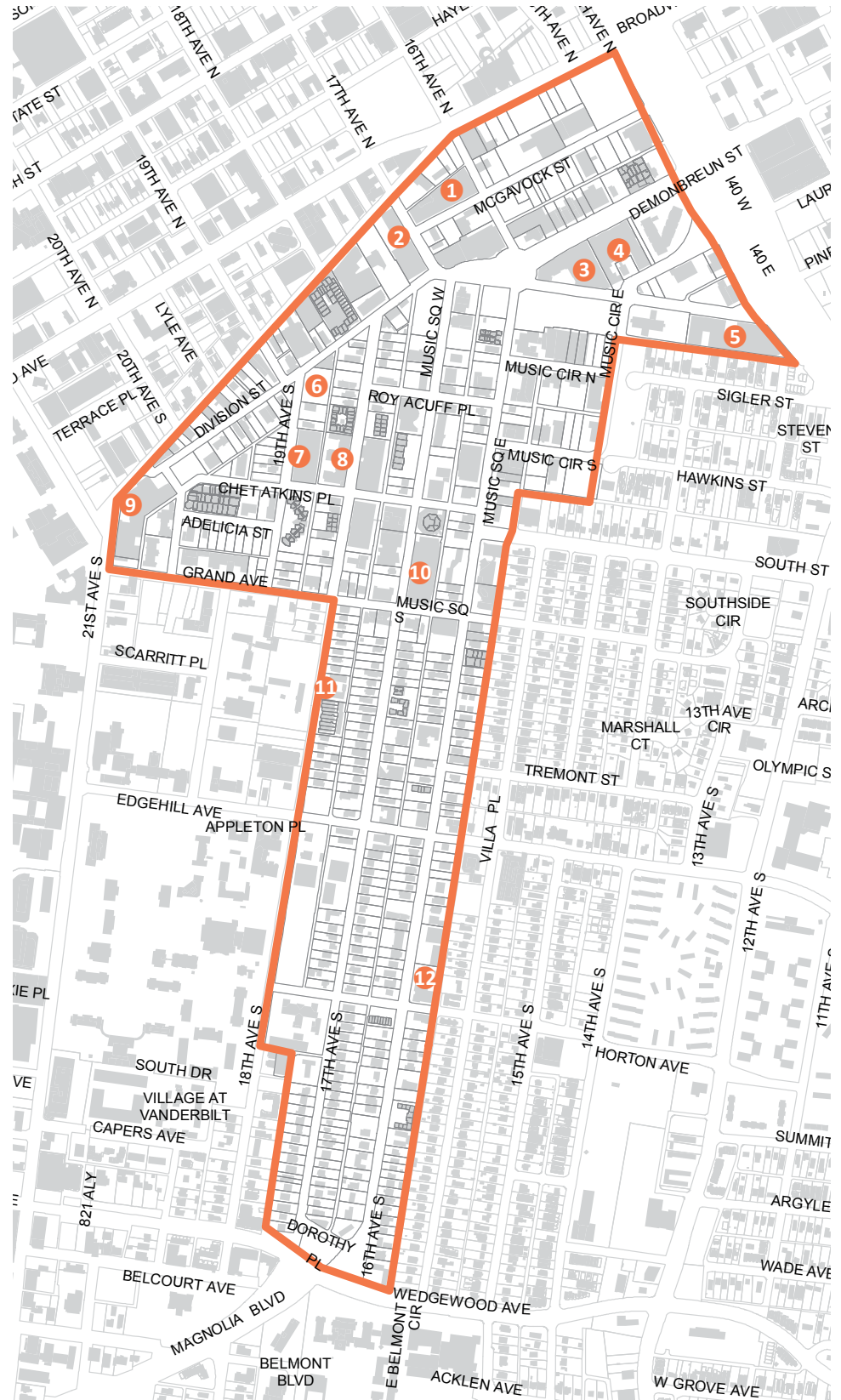
Residential development on Music Row
Multifamily development along 18th Avenue South

New Apartment Buildings on Music Row since 2010

- 1 The Cadence
190 units. 2016
- 2 Skyhouse Nashville
352 units. 2017
- 3 Element Music Row
413 units. 2016
- 4 1505 Demonbreun
209 units. 2016
- 5 Infinity Music Row
275 units. 2017
- 6 Kenect
420 units. Q4 2019
- 7 The Morris
344 units. 2017
- 8 The Artisan
153 units. 2014
- 9 Aertson Midtown
524 units. 2016
- 10 Millennium
230 units. 2017
- 11 Midtown Place
60 units. 2012
- 12 Note 16
86 units. 2013

3,274 new units

3,274
number of residential
units added to Music Row
between 2010-18



Prohibitive Zoning for Third Places

Music Row was built on the regular practice of interacting with others to exchange information, collaborate, and create. Music Row's third places help the creative cluster compete against the lure of home studios. After home, first, and workplace, second, third places serve an essential role in providing opportunities for regular, voluntary, and highly-anticipated gatherings. Music Row is losing its local watering holes and familiar spaces for informal social interaction. Current zoning does not necessarily support their replacement.



Example of Third Place Bobby's Idlehour Tavern

Third Places facilitate informal social interaction

Musicians, singers,
songwriters, producers

Trade unions

Recording and
broadcasting engineers

Publishers



Labels, managers,
agents

Retailers, radio, digital
music distributors

Promoters, venues,
ticketing festivals

Insufficient Infrastructure

While the third places are disappearing, more residents and visitors are still drawn to Music Row's unique vibe. Unfortunately, this growth worsens infrastructure challenges creating day-to-day pressures on music-related businesses.

High-speed Internet

Several music-related businesses expressed in their survey responses the need for fiber broadband – currently the fastest method of delivering high-speed Internet. In order to keep pace with the evolving industry, high-speed Internet is essential for music and creative professionals to quickly share digital data and content. Regrettably for music-related businesses in historic buildings, service providers often wait for new development to install a new fiber optic network because of the large capital expenditure.



Informal alley conditions

Alleys

Alleys present another infrastructure challenge for the Row. They function as a secondary local street system. While alleys are the “back of house” to many Music Row businesses, they also have often been how celebrities come and go without being noticed. However, Music Row's alleys are not well-lit; they are inefficiently arranged for parking, too narrow for some vehicles, and generally not adequate for their unique and critical function.

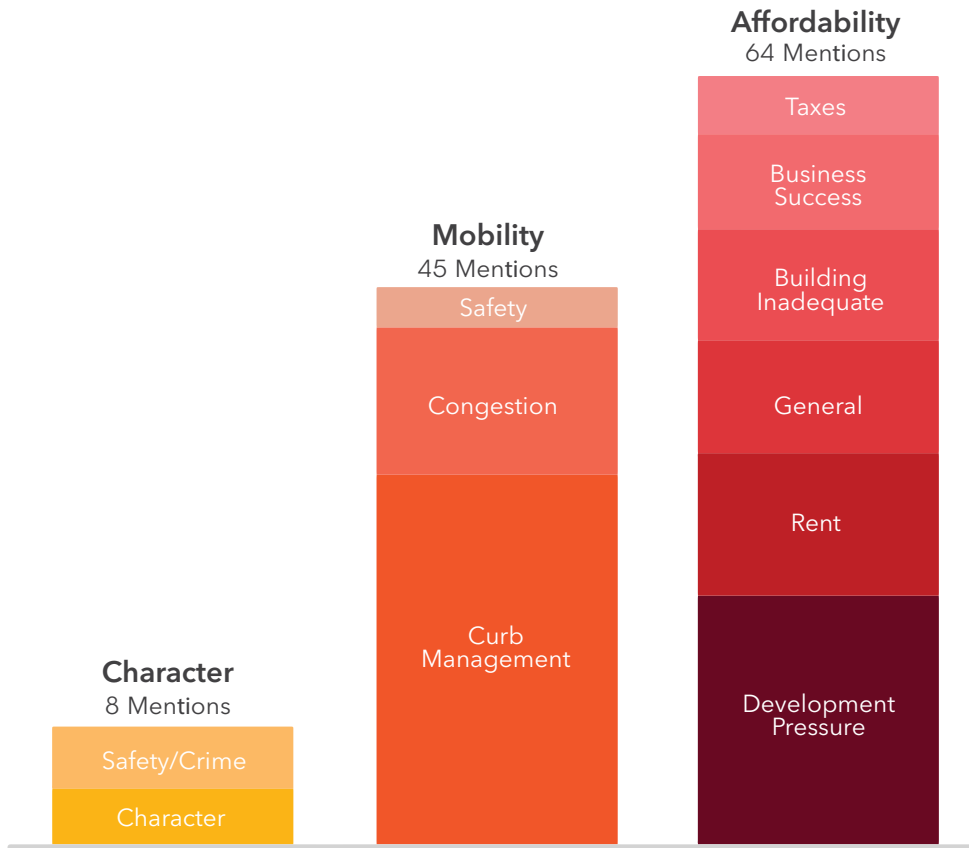
Mobility

On the primary street system, many businesses on Music Row front a one-way street, either 16th or 17th Avenues. Vehicles stop less and travel at higher speeds on one-way streets, providing fewer opportunities for pedestrian and bicycle crossings.

About one-third of music-related businesses surveyed claim that curbside management, traffic congestion, or mobility safety present a challenge to remaining on Music Row. Musicians, songwriters, and other users of the Row have difficulty finding on-street parking during the day. Some have suggested that university students and construction workers occupy the parking spaces before the regular business day starts. Others remarked the challenge that bollards protecting bicycle lanes present to delivery drivers. Parking and curbside management are perceived obstacles to daily business activities, but the extent to which they threaten the creative cluster's functions is not well defined.

When people feel unsafe moving throughout the Row by foot or bicycle, and find it difficult to park, cross-collaboration between music-related businesses suffers.

Obstacles and Challenges for Music-Related Businesses



Note: 12% of Music Related Business respondents said they do not face any challenge or obstacle to remaining on Music Row.




1/3

of music-related businesses surveyed claim that curbside management, traffic congestion, or mobility present a challenge to remaining on Music Row



Sidewalk obstructions are common throughout Music Row



“ You shape your
own destiny. ”

– Chet Atkins
One of the creators
of the Nashville Sound

Recommendations

Even with these mounting pressures, music-related businesses choose to remain on Music Row. The Music Row Business Survey confirms that most want to stay on the Row, and many refer to the defining elements, such as the campus-like atmosphere, as reasons to stay. As a result, 89% of music-related businesses state that it is important for them to remain located on the Row, and 91% said they plan to stay.

The Nashville Area Chamber of Commerce says, "Music is the heritage of Nashville's economy... but even more, music is the future of Nashville's economy." As such, Music Row should not only explore new directions of growth and emerging technologies, but also promote entire new subsets of the music and entertainment sector.

However, as a cluster built on creativity, it is even more challenging to prescribe solutions for Music Row. Research on industry clusters indicates that it is easier to identify the characteristics of successful clusters than ways of reproducing them. Dr. Richard Florida, an urban studies expert who created a concept of the creative class, posits "Creativity is organic, you can't plan for it, you can only give it room and freedom to grow." The Music Row Vision Plan acknowledges the evolving and organic nature of Music Row's unique creative cluster while providing guidance to protect, preserve, and ensure the cluster thrives.

Many participants in this visioning process believe that changes in the industry, migration of creative industries out of the neighborhood, and an increase in non-music-related uses entering the neighborhood are causing Music Row to lose its unique sense of place. Edward T. Macmahon, Senior Fellow for Sustainable Development at the Urban Land Institute defines sense of place as, "a unique collection of qualities and characteristics - visual, cultural, social, and environmental - that provide meaning to a location." The recommendations of this plan focus on defining and building upon the distinct characteristics of Music Row, allowing it to grow and flourish, while maintaining qualities that make it unique.

These recommendations consist of many tools—plans, policies, programs, zoning, incentives that should be implemented in tandem for combined added value. The recommendations are summarized in the following categories:

- Character Areas
- Culture and History
- Collaboration
- Land Use and Mobility

Character Areas

This plan utilizes place-based planning, an approach to guiding development that emphasizes the desired look, feel, form, and character of a neighborhood or district. The plan establishes "Character Areas" that are intended to encourage development that fits with the existing and desired character of these unique places. The descriptions that follow illustrate both the existing and desired future character of these areas. Characteristics such as land use, development pattern, intensity, and form all play a role in reinforcing the existing or desired character of each Character Area. These recommendations are meant to guide future development by supplementing existing zoning, and to inform future form-based standards specifically developed for each area of Music Row.

Located within two of the Character Areas are unique sub-districts. The sub-districts have been created to reflect distinct characteristics of particular locations and their relationship to the surrounding context. One sub-district may be necessary to provide a transition between place types, while another may be a great location for a particular use.



Vision Statement

Music Row's success is built on the concentration of creativity that naturally occurs in a single location where musical talent is located and developed, and music can be created, published, recorded, and promoted. Balancing the preservation of our heritage with adaptation to change and growth will create the music of our future.



The Subdistricts displayed in the Character Area Map depict a general transition in height stepping down from Midtown, one of the most intense areas of development outside of Downtown Nashville, to Edgehill, a residential neighborhood with detached homes. The northern-most Subdistricts, where Class A office space and mixed use development is expected to occur, should accommodate taller buildings with larger development footprints. Whereas, the Subdistricts to the south should accommodate a finer grain of buildings with a shorter heights and a smaller footprint.

A Transferable Development Rights program should work in conjunction with the established Character Area Map. A TDR program is one of many policy tools that can be used to leverage development pressures in other areas of the city to preserve historically designated buildings in Music Row. At its root, TDR programs are a form of value-capture mechanism intended to leverage the strength of a market and put them to use for a public good, such as, in this case, the preservation of music-related businesses and structures on Music Row. A study conducted for Metro Planning demonstrates that a TDR program for Music Row is feasible from a market and economic perspective if appropriate elements for such a program are put in place.

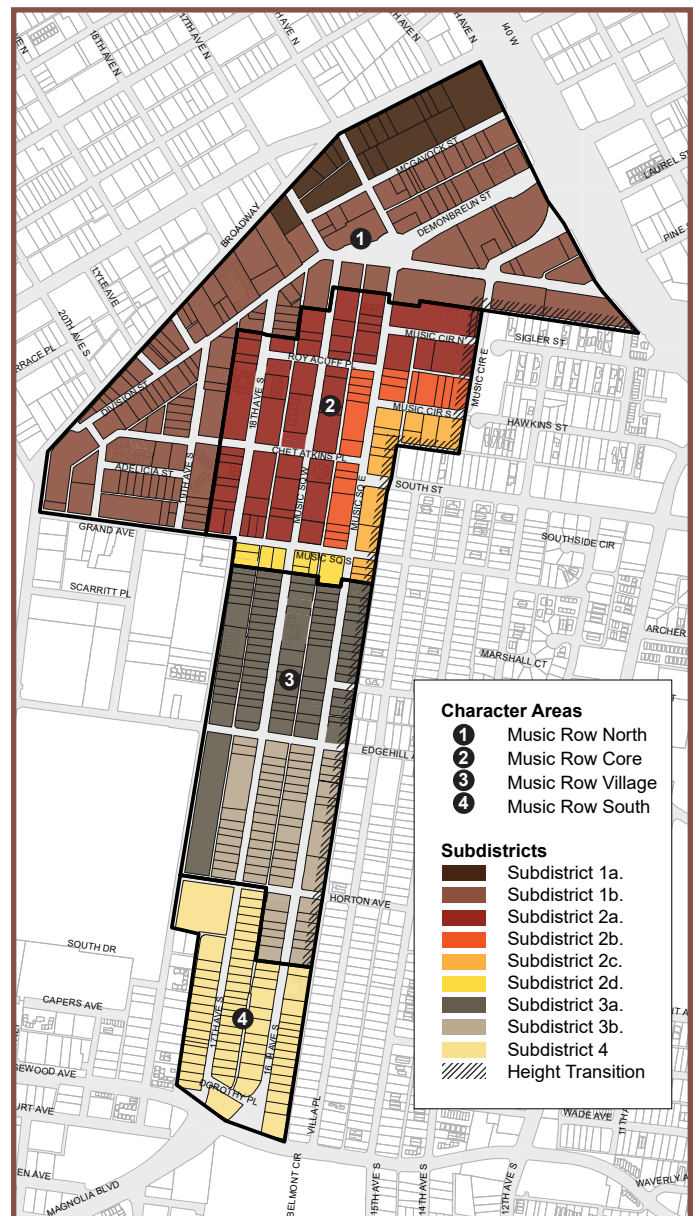
The premise of a TDR program allows for an exchange, or transaction of value, to occur between two properties - a sending area and a receiving area. The property owner of a sending site could sell air rights that exist above a historically significant building in exchange for compensation. In turn, a property owner of a receiving site receives the air rights purchased and adds it to its existing height entitlements as bonus height. The trade-off incentivizes preservation of cultural assets and redirects additional height to areas where it is appropriate and demand for growth is high.

Character Areas

The Character Area Map establishes a framework for the desired characteristics of land use, development pattern and intensity and form of future development. The map outlines four distinct character areas.

Character Areas

- 1 Music Row North
- 2 Music Row Core
- 3 Music Row Village
- 4 Music Row South





1. Music Row North

This area serves as a gateway to the Gulch, Midtown, and Downtown. It is intended to promote growth with high-rise development containing a mixture of uses and commercial activity. The area offers a high-energy urban experience, with towers activated by engaging and inviting ground-floor retail. A diverse mix of office, residential, retail, hotel, restaurants, and bars makes this area a center of activity around the clock.





Sub-district 1A

Sub-district 1A is composed of lots fronting 14th Avenue South, McGavock Street., 17th Avenue South, and Broadway. This sub-district has the greatest flexibility in land use, building height, and intensity, more so than any other area within the Music Row boundary. This sub-district is bookended on the east by Interstate-40 and the 25-story SkyHouse Nashville on the west. Properties here are predominately zoned MUI-A, one of the most intense zoning districts in Nashville, and located across Broadway from the approved 400-foot tower development currently known as Broadwest.

Recommended uses: Mixed-use with active retail, bars, and restaurants; office; hotels; residential. In large building footprints, multiple public facing uses are encouraged to maximize activity, including activity on the weekends and evenings.

Recommended form: Large-scale development; property assemblage is appropriate to achieve mid-to-high rise development pattern; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or music-related uses to be defined by a Music Row Code; 20 stories by right, up to 25 stories with preservation and commitment to music uses.



Sub-district 1B

Sub-district 1B within the Music Row North character area is primarily comprised of properties fronting on Broadway, Division, Demonbreun, and 19th Avenue South. This sub-district is a focal point for recent mid-to high-rise development activity. The construction of Adelia in 2009 attracted high-rise developers to this area. Since that time, nine rezonings for high-rise developments, ranging from 20 to 25 stories, have been approved. Many are completed or currently under construction.

Recommended uses: Mixed-use with active retail, bars, and restaurants; office; live music venues; hotels; residential. In large building footprints, multiple public facing uses are encouraged to maximize activity, including activity on the weekends and evenings.

Recommended form: Large-scale development; property assemblage is appropriate to achieve mid-to high-rise development pattern; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or music-related uses to be defined by a Music Row Code; 15 stories by right, up to 20 stories with preservation and commitment to music uses.



2. Music Row Core

This area has been the heart of the music industry in Nashville for 60 years. The protection, restoration, and reuse of these structures is a priority. Historic buildings and features are preserved to contribute to a distinctive sense of place. New development responds to the existing context by transitioning from high-rises to the single-family form of Edgehill.

Uses focus on Class A office buildings that cater to music-related businesses, and a range of building heights from low- to mid-rise contribute to the pedestrian-oriented environment with active alleys, inviting lobbies, and spaces to showcase musical talent. High-quality streetscapes and public spaces provide amenities to workers, musicians, and visitors, as well as promote a pedestrian-friendly environment. Four distinct sub-districts have been identified within the Music Row Core character area.





Sub-district 2A

Sub-district 2A within the Music Row Core is located north of Grand Avenue, primarily along 18th Avenue South and 19th Avenue South, but also extends to the east to capture Warner Music, BMI, and Best Western Plus.

Recommended uses:

A variety of music-related office uses, especially Class A office space; Ground floor retail amenities are encouraged.

Recommended form:

Moderate-scale development; property assemblage is appropriate to achieve mid-rise development pattern; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or commitment to music-related uses; 8 stories by right, up to 12 stories with preservation and/or commitment to music uses to be defined by a Music Row Code.



Sub-district 2B

This sub-district is located north of Grand Avenue, on the west side of Music Square East, and along the north side of Music Circle South.

Recommended uses:

A variety of music-related office uses, especially Class A office space; Ground floor retail amenities are encouraged.

Recommended form:

Low- to moderate-scale development; property assemblage is appropriate to achieve low- to mid-rise development pattern; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or commitment to music-related uses; 5 stories by right, up to 8 stories with preservation and commitment to music uses to be defined by a Music Row Code.



Sub-district 2C

This sub-district is located north of Grand Avenue, on the east side of Music Square East, and along the south side of Music Circle South. This sub-district serves as a transition between the low- to mid-rise development pattern of Sub-district 2B and the Edgehill Neighborhood to the east.

Recommended uses:

A variety of music-related office uses, especially Class A office space; music-related flex space for small events is encouraged on ground floors.

Recommended form:

Low-scale development; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or commitment to music-related uses to be defined by a Music Row Code; 3 stories by right, up to 5 stories with preservation and commitment to music uses. Building heights should step down from 5 stories at the street to a maximum of 3 stories at the rear setback.



Sub-district 2D

This sub-district includes properties within 200 feet of Grand Avenue from 16th Avenue South to 18th Avenue South. An expansion of Flora Wilson Community Plaza, along Grand Avenue, just east of 16th Avenue South has been identified as a new open space opportunity.

Recommended uses:

Small retail, cafes, bars, and restaurants; small live music venues would be ideally situated here; a variety of music-related office uses, with ground floor retail is encouraged.

Recommended form:

Low- to moderate-scale development; height bonuses (TDR receiving area) appropriate in this area in exchange for historic preservation and/or commitment to music-related uses; 5 stories by right and up to 8 stories with preservation and commitment to music uses to be defined by a Music Row Code.

3. Music Row Village

This walkable, campus-like, environment connects Music Row to neighboring Edgehill and Edgehill Village to the east and Vanderbilt University to the west. It is intended to be a mixed use area that is a vibrant concentration of creative businesses, including recording studios, small music venues, guitar shops, classrooms, and art galleries. Indoor and outdoor spaces for people to gather are abundant in the form of cafes, bars, courtyards, and pocket parks. This is the place where art is made, and there is always something creative and exciting going on.

The village atmosphere reflects the neighborhood's rich, cultural heritage with the adaptive reuse of significant buildings alongside low-rise infill – a symbol of the Row's storied past and bright future. This walkable center of creative activity serves as an international cultural destination. The area maintains a fine grain mix of traditional and contemporary-built low-rise structures, and is intended to promote and support a creative culture with small-scale office, retail, and restaurant uses over time.

Music Row Village is primarily located between Horton and Grand Avenues.



Sub-district 3A

Recommended uses:

Small-scale creative office uses; retail, cafes, bars, and restaurants; small live music venues would be appropriate, primarily along Edgehill Avenue; live/work and residential.

Property assemblage of multiple lots for new residential development is not appropriate. Affordable residential is encouraged, and units related to the support of music-related uses should be the standard for the area. Affordable, live/work units are ideal. New residential construction at the expense of business/office spaces is discouraged.

Recommended form:

Low-scale development, generally residential in character; deeper setbacks with front lawns and landscaping; property assemblage is discouraged in this area; height bonuses (TDR receiving area) are NOT appropriate in this area; any new residential should be in the form of single family, duplex, quadruplex and townhomes; maximum building height of 5 stories. Building heights should step down from 5 stories along 16th Avenue South to a maximum of 3 stories at the rear setback.



Sub-district 3B

Recommended form:

Low-scale development, generally residential in character; deeper setbacks with front lawns and landscaping; property assemblage, beyond two 50-foot lots, is discouraged in this area; height bonuses (TDR receiving area) are NOT appropriate in this area; any new residential should be in the form of single family, duplex, quadruplex and townhomes; maximum building height of 3 stories. In locations where slight additional height would not disrupt the character of the neighborhood, 3.5 or 4 stories may be appropriate. This additional height may be in a raised basement space, or within a pitched-roof form, or as a story stepped-back from street facing facades. This additional height is only appropriate on double lots (100 feet in length) with generous side setbacks.



4. Music Row South

The southern gateway to Music Row maintains a walkable environment with a historic quality. The majority of this area contains single-family residential building types and is located within the South Music Row South Conservation Overlay District administered by the Metro Historic Zoning Commission. Great examples of American Foursquare, Craftsman, Bungalow, and Tudor Revival houses have been converted for office uses, many of which house music-related businesses.

This area serves a supporting role to the larger businesses to the north. The primary use continues to be office, while housing and a limited number of small, local-serving retail establishments are integrated into the residential fabric. Buildings are oriented toward the street with traditional neighborhood features, such as stoops and small landscaped yards, which contribute to an inviting public realm. This portion of the neighborhood serves as a vital connection between Belmont University and the music industry of the Row.

Open Space within the public right-of-way at the intersection of Wedgewood and 16th and 17th Avenues will serve as an iconic gateway, hosting music events and celebrations, complementing and bookending the iconic nature of the Demonbreun Roundabout to the north. Music Row South is primarily located between Horton and Wedgewood Avenues. This character area includes properties within the South Music Row South Conservation Overlay. There are no individual sub-districts within this character area.

Recommended uses:

Small-scale creative office uses; live/work; residential. Property assemblage of multiple lots for new residential development is not appropriate. Affordable residential is encouraged, and units related to the support of the music-industry should be the standard for the area. Affordable, live/work units are encouraged. New residential construction at the expense of office uses is discouraged.

Recommended form:

Form consistent with the standards and guidelines of the adopted Conservation District; low-scale development, generally residential in character; deeper setbacks with front lawns and landscaping; height bonuses (TDR receiving area) are NOT appropriate in this area; any new residential should be in the form of single-family, duplex, quadruplex, and townhomes; maximum building height of 3 stories.



Though these character areas have unique identities, their combined effect is a singular, thriving music-business cluster that is key to Nashville's distinctiveness as a whole. Every effort must be made to strengthen the cluster and reinforce this area as the core of the music industry in Nashville and beyond.



Collaboration

A wide range of music-related businesses and supporting uses call Music Row home. Many of these stakeholders have different needs but shared understanding of common resources and challenges on the Row. The recommended collaborations describe those actions stakeholders should take, together, to continue to strengthen Music Row as a vital creative cluster.

Collaboration tools are categorized under the following headings:

- Music-related Uses
- The Third Place
- Tourism
- Opportunity Zones
- Affordability
- Public Open Space





Music-related Uses

In order to celebrate the unique creative cluster that is Music Row, and for the purposes of this plan, we define the music industries that call Music Row home as those businesses that share a common interest in the creation, performance, and distribution of music. A variety of business sectors with varying degrees of capital, employees, and reach have a vested interest in the unique character of the area. This definition accommodates the evolution and complexity associated with the music industries of the 21st century.

The Music Row Steering Committee should create or re-establish a nonprofit business organization or merchants association. This new business group should include all music-related, non-music-related, and ancillary uses, in order to promote the Row for everyone's benefit. The inclusive business association should:

- Maintain and expand existing music industries in the area.
- Work with the Planning Department to ensure zoning incentives for music-related uses.
- Promote and manage tourism for the Row.

- Champion affordability.
- Create a music business incubator.
- Foster connections between universities and music-related incubators, business development, and entrepreneurial opportunities.

In that spirit, continued real estate expansion by universities into Music Row should support the music and creative industries to the extent possible so long as the activity is consistent with the institution's academic mission.

At the same time, it is important to foster relationships with Belmont University and Vanderbilt University and promote building uses that complement music-related business uses. Belmont and Vanderbilt are important partners to the future of the Row. The Curb School of Music is an exemplary, appropriate use of a Music Row property by a university.

The Third Place

Third places are not home or work. They are places where people meet to unwind, talk about things that matter to them, develop new friendships, and deepen existing ones. Common third places include cafés, coffee shops, bars, and parks. Third places are essential for allowing neighborhoods and communities to develop and retain a sense of cohesion and identity. Music Row needs third places to provide opportunities for networking and sharing creative ideas. To harness the power of third spaces on Music Row stakeholders should:

- Increase opportunities for a vibrant mixture of uses and spaces for music industry folks to gather.
- Create spaces for live entertainment. Live performance venues, open spaces, and festivals could be a strong tourist draw for Music Row and reinforce the area's role as a creative industry production hub and should be both permitted and incentivized.
- Bridge the public and private realms with lawns and front porches. On Music Row, they provide spaces for people to gather and can be programmed for the music industry and be publicly accessible.
- Design and program existing and future public parks for festivities related to the music industry, like concerts and release parties.

Opportunity Zones

Opportunity Zones, established as part of the Tax Cuts and Jobs Act of 2017, are an economic development tool to spur investment and increase economic activity in economically-distressed areas. The program allows significant tax incentives to taxpayers to reinvest unrealized capital gains in certain properties and businesses located or operating in low-income Census tracts which have been designated as Qualified Opportunity Zones (QOZ) by the U.S. Department of Treasury. Thirty-one Census tracts have been designated as QOZs in the Greater Nashville Area. A portion of Music Row is located in the Nashville-Edgehill Opportunity Zone. Zone designations were certified in Spring 2018 and will remain in effect until December 31, 2028. There are currently no policy mechanisms to add, subtract, or change Opportunity Zone census tracts during the life of the provision. Interested investors should contact the Greater Nashville Regional Council for more information.

Tourism

Recently various businesses and organizations have pursued tourism enhancements, like signage and walking tours, for Music Row, and that should continue to be a focus. Tourism highlights important historic resources, and may help businesses generate alternative income.

Enhanced tourist experience elements might include walking tours, trolley tours, well-crafted signage, small-scale live entertainment, congratulatory banners, targeted retail venues, and interactive phone apps. The visual experience for tourists should be purposefully curated. Singer-songwriter venues should also be encouraged to attract visitors.

However, tourism on Music Row should not interfere with business activities. Tourism efforts should be led by an organization that can balance the needs of all stakeholders for an improved experience in the Row. The previously mentioned business association should be responsible for promoting and managing tourism throughout Music Row.

Affordability

The biggest threat to businesses remaining on Music Row is lack of affordability. Property owners south of Grand Avenue have experienced tax increases created by new, large-scale development to the north of them. Many small businesses that rent suffer when property owners increase rent in response to higher tax liabilities. The inclusive business association should champion affordability for the Row, including working with key partners to:

- Analyze tools and incentives to retain and attract tenants within the music-industry, while maintaining affordable work spaces.
- Develop a strategy for property tax relief, especially for properties south of Grand Avenue.
- Facilitate small business assistance, lease negotiations, and serve as a liaison with Metro departments and the Nashville Chamber.
- Consider the relationship between parking and affordability and seek solutions that address both concurrently.



Public Open Space

Open spaces provide additional opportunities for social interaction and networking, reflection and creative thought, and performances and gatherings. While the “Musica” sculpture and Owen Bradley Park serve as iconic features for Music Row, employees and

residents need more comfortable access to open space opportunities in this 1.25-mile-long district. Open space efforts should be collaboratively led by community groups and Metro Parks and Recreation Department, with support from the Planning Department and Metro Arts Commission..

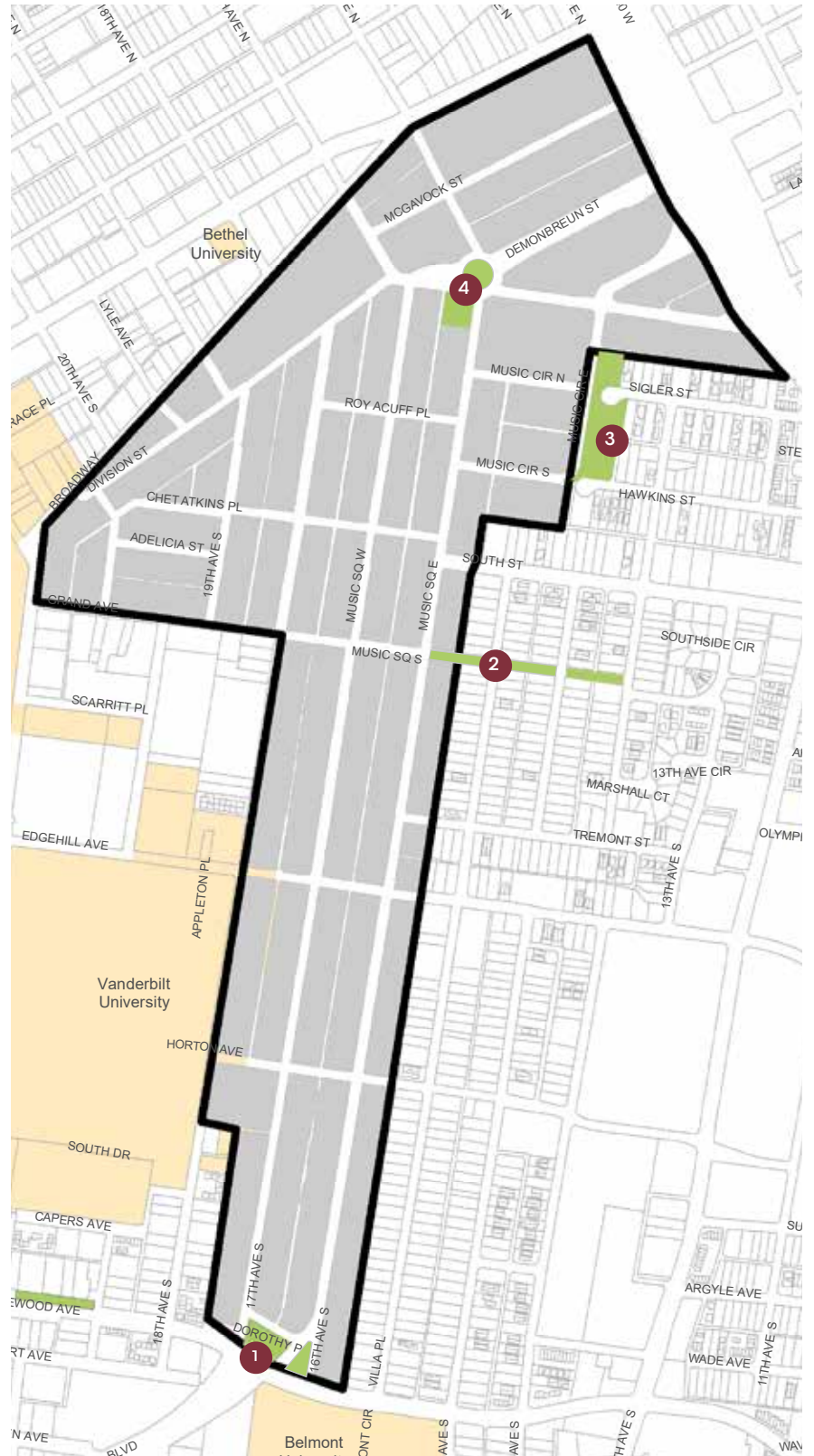


Ben Johnson

Music Row Open Space Plan

The Open Space Plan identifies key opportunities to contribute to Music Row's sense of place.

- 1** Develop a gateway at the southern end of Music Row. Utilize Metro-owned property and public right-of-way located in the area bounded by Dorothy Place, Wedgewood Avenue, 17th Avenue South, and Magnolia Boulevard to construct a new public gathering space. This space should include public art, serving as a bookend to Musica in the roundabout at the northern end of the district. This space should also incorporate a small performance venue that could be utilized during festivals.
- 2** Work with Belmont Church and the Edgehill Neighborhood Association to expand the Flora Wilson Community Plaza along Grand Avenue from Villa Place to 16th Avenue South.
- 3** Ensure that buildings on the boundary address the open space at Tony Rose Park (e.g. through building orientation or architectural elements) while respecting the transition to the residential neighborhood.
- 4** Maintain and support Owen Bradley Park and the "Musica" round-a-bout. "Musica" is Music Row's signature sculpture piece located at the northern gateway to Music Row. The round-a-bout and Owen Bradley Park celebrate the diversity and history of music and should be maintained and supported with future land use decision-making.



Culture and History



According to the National Trust for Historic Preservation's 2016 recommendations report, Music Row is more than the sum of its historical parts. The Trust designated Music Row a "National Treasure," due to the music industry cluster's unique contribution to American cultural heritage. Stakeholders both on Music Row and in the broader community see the retention of the Row as crucial to Nashville maintaining its moniker Music City U.S.A. Property owners should work with the National Trust for Historic Preservation and other stakeholders to preserve the iconic structures that tell the legendary story of Music Row's past, while allowing the music industry to grow and continue to make history in this location. The following recommendations should be bundled together for maximum impact.

Culture and History tools are categorized under the following headings:

- Cultural Industry District Designation
- Historic Tax Incentives
- Historic Rehab Building Code
- Historic Preservation Grant Fund
- Façade Easements
- Historic Landmark Designation
- Transferable Development Rights

Cultural Industry District Designation

Metro Council should designate Music Row as a "Cultural Industry District." This designation, along with a managing entity like the inclusive business association, could work to strengthen, develop, and promote the music industry and associated businesses on Music Row. According to the National Trust for Historic Preservation, this

district would have a broader economic development function relating to cultural industries and specifically to Nashville's world-renowned music industry. No matter their industry, respondents to the Music Row Business Survey showed broad support for a Cultural Industry District Designation.



Historic Tax Incentives

National Level

The federal tax credit for historic preservation allows program participants to claim 20% of eligible improvement expenses against their federal tax liability. The National Park Service and the Internal Revenue Service administer the program in partnership with the Tennessee Historical Commission.

State Level

A state tax credit, especially when bundled with other incentives, could offer to close the expense gap felt by property owners. Although a state tax credit currently does not exist in Tennessee, such a tool would provide an economic incentive for rehabilitation of existing structures. Pending approval by the Tennessee legislature, a tax credit could give property owners rebates on their state taxes for approved rehabilitation projects to historic buildings.

Historic Rehab Building Code

Nashville's existing buildings are valuable assets that should have the ability to be reused over time to meet the demands of future development. In 1983, Nashville enacted local legislation supporting the need for the conservation and rehabilitation of Metro's existing building stock. This legislation gave the Director of Codes discretionary power to modify in whole or in part the application of any provision of the adopted Building Code so long as modifications are consistent with the intent of the Code and they achieve acceptable levels of safety for the general public. A Rehab Committee was formed to implement this legislation and to offer a simplified process to identify alternative design solutions to bring existing buildings into compliance.

Throughout the community engagement process, some property owners indicated that meeting building codes and navigating the permitting process are deterrents to the rehabilitation of historic structures. Many of the buildings on Music Row are desperately in need of repair or adaptation, especially when converting to a music-related use. Metro should clarify and make more transparent the Rehab Committee process for adaptive reuse of existing buildings.

Furthermore, the Metro Historic Zoning Commission, along with the Department of Codes, should work together to evaluate the need for a historic rehab

building code. The code would provide clear guidelines to the public on the process for modernizing buildings to meet safety standards. Ideally, the code would provide flexible solutions for rehab, while ensuring a desired level of safety. The goal of the code should be to provide choices to adapting existing building stock and minimizing the degree of replacement and reconfiguration of buildings.

Historic Preservation Grant Fund

In 2017 the Mayor's Office of Economic and Community Development launched a matching grant program to improve commercial historic properties in specific areas of the county. Grants can be used for exterior work on historic properties such as roofs, windows, masonry, and siding. Several properties on Music Row are eligible for this funding, if Metro Government continues to allocate funding. Interested property owners or investors should contact the Mayor's Office of Economic and Community Development or the Metro Historical Commission for more information.

Facade Easements

Historic Nashville, Inc. (HNI), a non-profit organization in Nashville, oversees a Preservation Easement program throughout the city. This preservation tool was created to protect historic buildings while providing an economic incentive to building owners. The owner places a preservation easement on the façades of the building and, in return, the owner can take a charitable deduction on their Federal income taxes for the value of the façade or rights given away.

HNI holds many preservation easements throughout the city, though none currently on the Row. Preservation advocates should work with property owners, the Metro Historical Commission, and Historic Nashville, Inc. to secure easements of culturally and architecturally important buildings.

Historic Landmark Designation

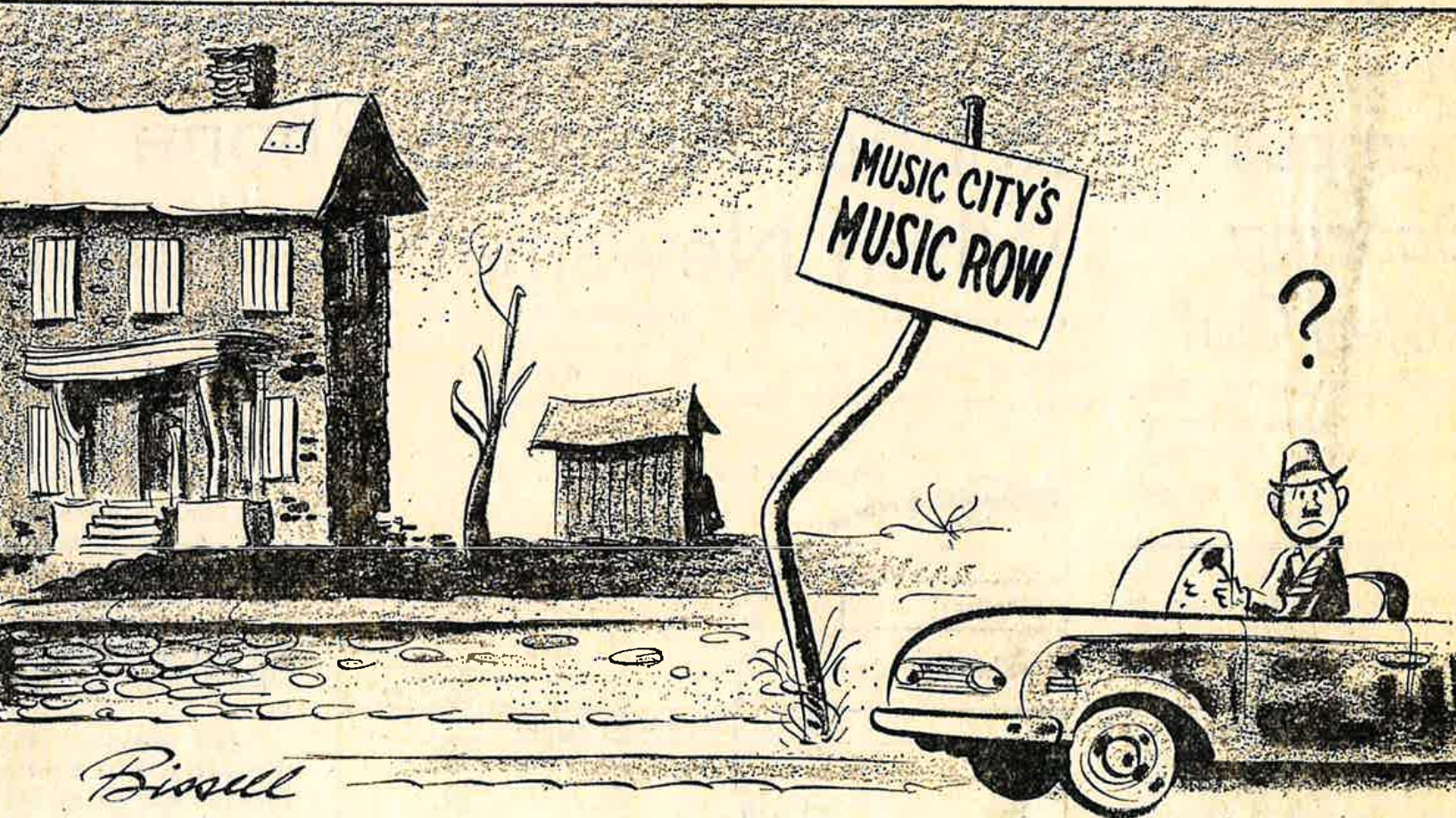
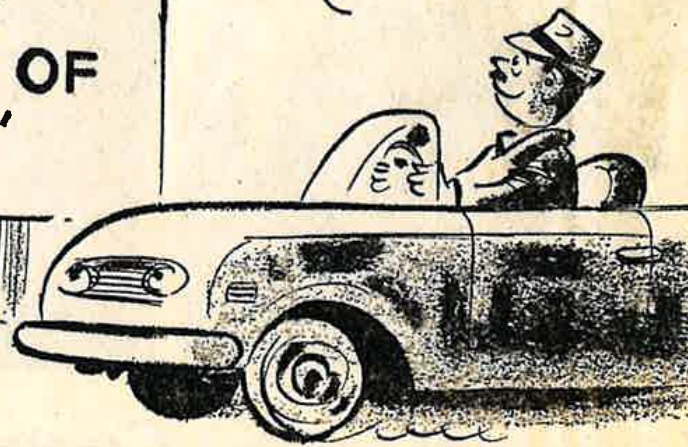
National Level

Property owners with buildings that have been identified as eligible to be listed on the National Register should work with the National Trust for Historic Preservation to take the steps necessary to have their significant structures included in the National Park's National Register of Historic Places. There are currently four properties on Music Row listed on the National Register.

A Tale of Two Cities

TENNESSEAN
DEC 23 1970

NASHVILLE:
**MUSIC CITY,
U.S.A.**
WORLD FAMED HOME OF
'THE NASHVILLE SOUND'



Bissell

Local Level

The Metro Historic Zoning Commission's Historic Landmark designation is a tool used to protect individual landmark structures that are listed or eligible for listing in the National Register of Historic Places. This designation is an overlay and does not change the base zoning. It applies the federal design standards for historic properties, The Secretary of the Interior Standards for Treatment of Historic Properties, as the benchmark for reviewing exterior improvements. Designating a property as a Historic Landmark requires a recommendation from the Metro Historic Zoning Commission and Metro Planning, and must be approved by Metro Council.

The preeminent structures on Music Row with music-related historical significance should be identified for Historic Landmark zoning. Eligible property owners should work with the Metro Historic Zoning Commission to achieve this level of protection.

Transferable Development Rights

A Transfer of Development Rights (TDR) program should be incorporated into a form-based zoning code (outlined in the next section). The TDR tool would allow existing Music Row property owners in certain areas to sell the difference between the existing square footage on their property and the maximum permitted by zoning. These rights could then be transferred to those looking to develop larger-scale office and mixed-use developments in the northern portion of Music Row where the built environment is more appropriate for large developments. A TDR program, if properly implemented and managed, could both support preservation of Music Row as the heart of the music industry in Middle Tennessee and allow for reasonable growth as land economics dictate. The following recommendations for the TDR program are based on the study completed by Economic and Planning Systems.

Transfer of Development Rights Feasibility Study

In 2018, Metro Planning hired economic consultant, Economic and Planning Systems, to conduct a feasibility study for Transfer of Development Rights in Music Row. The report, Music Row Transfer of Development Rights Feasibility Study, includes a summary of recommendations. The analysis serves as a critical foundation for using TDR as a mechanism for protecting historical and cultural assets within Music Row.



Recommendations for the TDR program include:

- A nonprofit organization, potentially working in partnership with Metro Nashville, should establish a TDR bank. This may be done in conjunction with a preservation trust, focused on expanded financial options for the preservation of historic structures and music businesses.
- Limit other means of acquiring additional development rights via Specific Plan (SP) zoning in the Music Row area.
- Create an enhanced transfer ratio to bridge receiving and sending site land values per buildable square foot.
- Consider greater multiplier for properties restricted to music-related uses and aggregated sending sites.

Sending Sites

- Limit the number of sending sites to preeminent properties at the outset of the program. The ramifications of designating too large a number of sites will affect the future viability of the district and the effectiveness of any TDR mechanism.
- Prioritize properties that are historically and culturally significant as sending sites.
- Designate a percentage of revenues to support a historic signage program to give prestige to the sending sites where milestones in the music industry occurred.

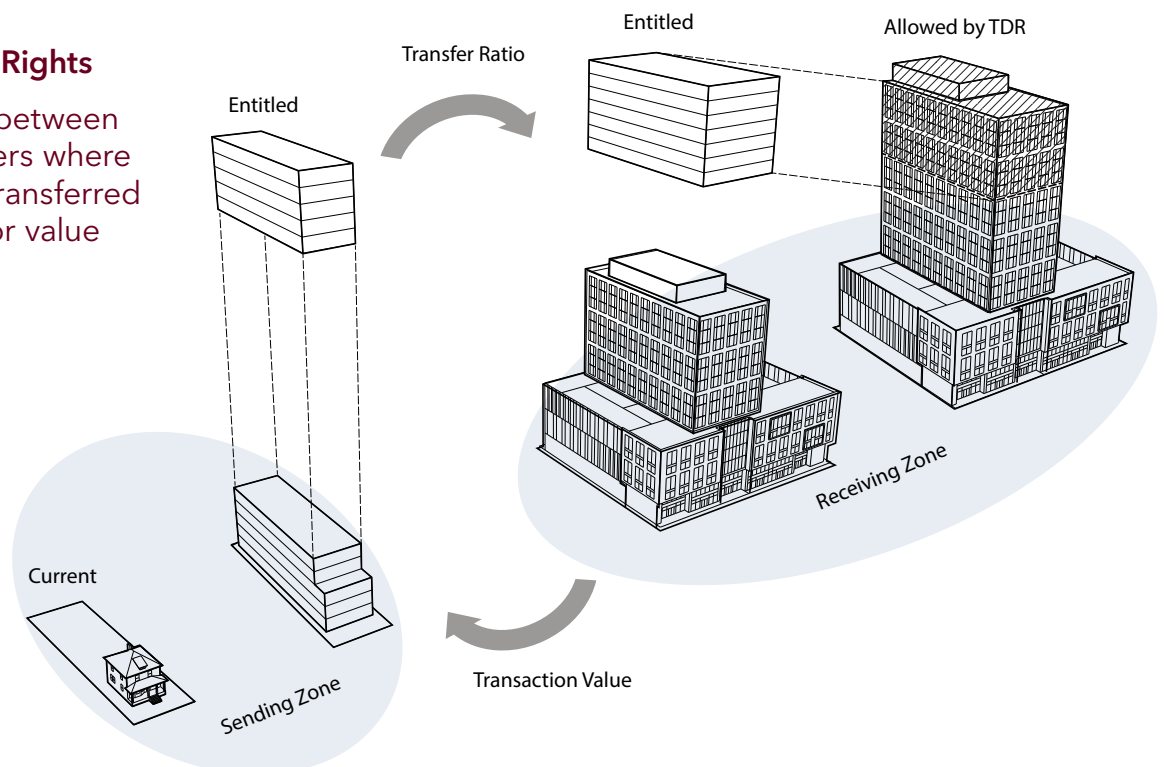
Receiving Sites

Receiving sites should be limited to:

- Properties located north of Grand Avenue and excluding historically significant structures.
- Properties located within the Downtown Code and excluding historically significant structures. The Downtown Code should be amended to include language outlining appropriate receiving areas with implementation of the Music Row Code.
- Future site specific zoning tools, where a TDR program outlines appropriate receiving sites
- Prohibit the use of historically and culturally significant properties as receiving sites.
- Review and readjust the TDR program periodically in a timely manner.

Transferable Development Rights

A transaction between property owners where air rights are transferred in exchange for value



Land Use and Mobility



Musica at the north end of Music Row

How land is used does not happen in isolation from other things the community cares about, such as affordability, public and private services, transportation and infrastructure. These ideas relate to one another, depending on the intended character and specific needs of a given area. The following recommendations offer general guidance to Music Row's land use, mobility, and infrastructure needs.

Land use is described as the activities people conduct on a particular piece of land. For example, land with homes on it – either a tall apartment building or a small house – is called residential. Land used for activities like offices, shops, or restaurants is nonresidential. Music Row is unique because the activity occurring is concentrated and tailored to the production, performance, and business of music. The calibrated land use recommendations that follow offer to support and sustain the continuation of the activities associated with music-related businesses.

Mobility is access to the spaces and places. Streets should provide space where people can safely walk, bicycle, drive, take transit, and socialize. The following recommendations provide guidance on future design elements that contribute and elevate Music Row's overall sense of place as a campus-like environment.

Land Use and Mobility tools are categorized under the following headings:

- Campus-like Atmosphere
- Office Space - Balancing Creative and Class A
- Multi-family Residential
- Infrastructure
- Alleys
- Fiber Broadband
- Curbside Management

Campus-like Atmosphere

Music Row's front lawns, open spaces, and landscaping are essential elements of the campus-like feel of the district, and they contribute to the overall sense of place that sets this creative cluster apart from any other. This environment, paired with proximity to music industry collaborators, should be maintained and reinforced. Proximity is key to the way the creative cluster works. Recommendations include:

- Maintain existing boundaries to keep the business district defined and compact. The boundaries of Music Row identified within this plan have plentiful opportunities for new businesses to emerge at different scales, depending on their location along the Row.
- Arrange music industry, business services, restaurant, retail, and residential uses throughout the district.
- Continue to strengthen the structure of the district, with increasing development intensity from south to north.
- Allow greater opportunities for third places between Edgehill and Grand Avenues. This location is easily accessible from the northern end of Music Row as well as the south. This area is a logical extension of vibrant restaurant and retail uses occurring along Grand and Edgehill, just beyond the boundaries of Music Row.
- Use specific Plan (SP) zoning for individual developments until a form-based code is in place. No other zoning tool in the Metro code provides the needed assurances and flexibility to accomplish the goals of the Vision Plan.
- Develop new form-based zoning (Music Row Code) to reinforce the campus-like environment. The code should:
 - Create sub-districts with appropriate standards for each unique area of Music Row.
 - Guidance so that new construction south of Grand Avenue should complement the residential character, with deeper front lawns, landscaping, appropriate architectural style, and traditional materials.

- Allow flexibility of scale and expression of form where such qualities relate to the spatial needs of the music industry. Examples of small-scale structures and building additions might include detached or attached studios, rear additions, outbuildings, or alley houses.
- Provide new street tree plantings throughout to maintain and enhance the "greenness" of the district.
- Include graphics to help regulate appropriate building forms and typologies.
- Provide greater flexibility in building form north of Grand Avenue; however, there should be a consistent setback/build-to line to give the district contextual coherence.

A form-based code can help balance the environment for creativity and for business within the Music Row boundary.



Office Space– Balancing Creative and Class A

Affordable office space for smaller, music-related businesses is important to the growth of the industry. Conversely, the availability of Class A office space is critical to the retention, and attraction, of major record labels and large businesses within the music industry. According to the Music Row Business Survey, 70% of businesses have 10 employees or less, with only 5% with 100 employees or more. To balance these uses stakeholders should:

- Support opportunities for Class A office space north of Grand Avenue at a scale that can accommodate major labels and large corporate music-related users.
- Ensure retention of creative office uses through a rehab code or Music Row Liaison to the Codes Department.
- Determine why certain large music businesses have left Music Row and if it would be to the City's advantage to have them move back on the Row.



Multi-family Residential

Large multi-family developments have replaced some of the music-related businesses that have left the Row. These developments erode the interconnectedness that has grown among music-related uses on Music Row over the past 60 years. The following should address the intrusion of multi-family residential:

- Prohibit new, large-scale multi-family residential development on Music Row, except in the area identified as "Music Row North"
- Prevent further deterioration of the creative cluster by targeting causes of its deterioration, i.e. demolition, property assemblages, construction of new multi-family developments.
- Small-scale multi-family residential development may be appropriate on Music Row where such uses contribute to the overall campus-like environment and identity of Music Row. Examples of small-scale multi-family residential development might include live-work, artist-in-residence housing, and detached or attached dwelling units that are situated to the rear of the lot.



Infrastructure

Infrastructure is the foundation of a strong, vibrant business district. Investing in Music Row's streets, alleys, and public spaces sets the cluster up for future success. At the outset of this planning study, Planning Department staff worked with property owners and music industry stakeholders to identify infrastructure needs within the district.

The guidance below describes the ideal buildout and makeup of Music Row's infrastructure. These recommendations should assist in updating the Major and Collector Street Plan with a future form-based code and in developing long-term major capital projects in the area. Because the facades of new structures are guided by the future street needs and parameters of a form-based code, the Major and Collector Street Plan's interactive map should be consulted for right-of-way, sidewalk, street tree, and bicycling needs until a form-based code is adopted.

Mobility Improvements

In order to reinforce the campus-like environment present on Music Row, transportation solutions must make the area more walkable, bikeable, and transit-friendly. Multi-modal roadway safety should be encouraged. Sidewalks, street trees, and a pleasant pedestrian experience should be emphasized throughout Music Row.



Map showing public infrastructure enhancements on Music Row.

Raised Intersection Concept Plan

A raised intersection, where the intersection is flush with the sidewalk would ensure the safety and walkability of the area, reduce traffic speed of drivers, and enhance the overall campus-like environment and identity of Music Row.

Curb extensions may be used for:

- > Historical & cultural wayfinding
- > Stormwater management
- > Improved Transit (WeGo Public Transit bus-stops and B-Cycle)
- > Overall aesthetic and identity





Music Row Street Vision Plan

The Street Vision Plan outlines four distinct character types for streets based upon the adjacent land use and mobility. These classifications describe streets' functions and adjacent uses to guide capital projects and updates to the Major and Collector Street Plan with a future form-based code. They are:

- Commercial Streets
- Neighborhood Streets
- Business Streets
- Connector Streets

Always consult the Major and Collector Street Plan's interactive map for block-by-block guidance for right-of-way, sidewalk, street tree, and bicycling needs.

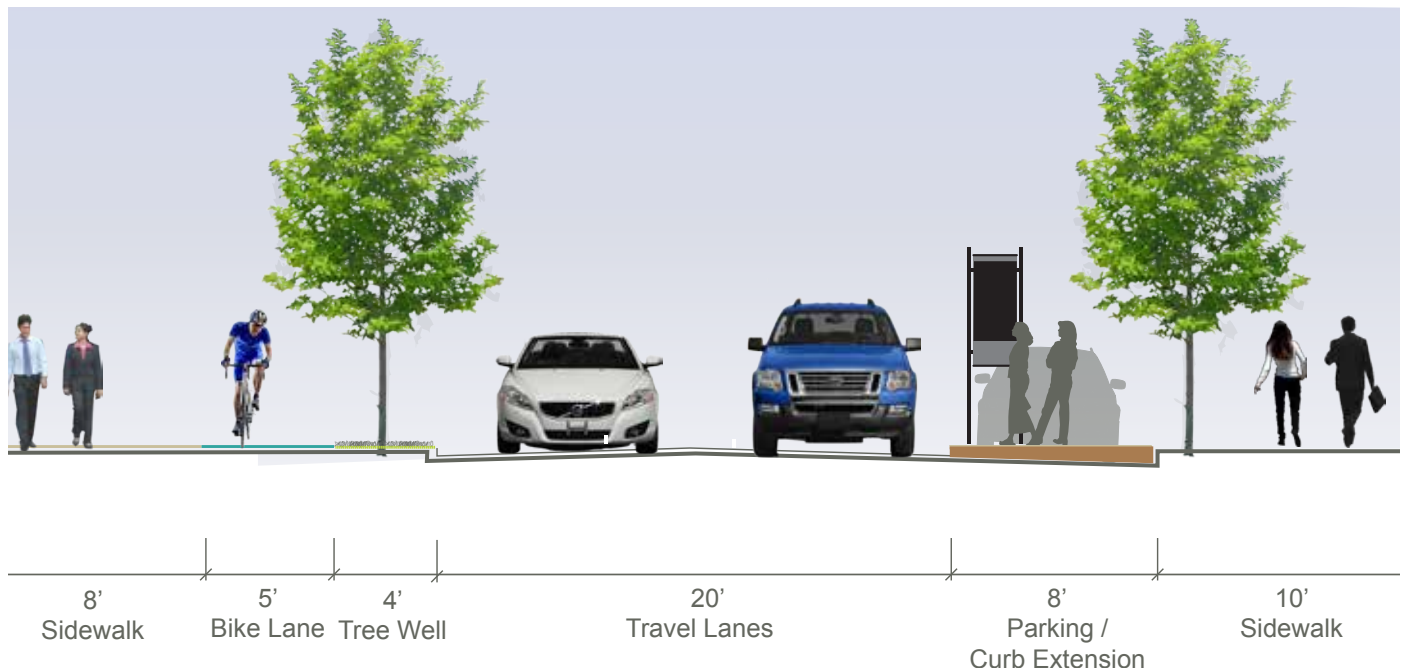
Business Streets

These streets serve as the major spine of Music Row, primarily serving music-related uses and their supporting functions. Street design guidance for a future Metro capital project:

- Maintain two lanes of one-way traffic.
- Formalize on-street parking on one side of the street with curb extensions at driveways and intersections.
- Incorporate wayfinding signage and landscaping within curb extensions at intersections.
- Enhance bus stops and shelters with further coordination with WeGo Public Transit.
- Provide 10-foot sidewalks with trees in grates on parking side of street.
- Provide 4-foot grass strips with trees planted at regular intervals on non-parking side of street.
- Provide 5-foot grade-separated bike lane on non-parking side of street.
- Construct 8-foot sidewalks on non-parking side of street.

Interim street design guidance reflected in the Major and Collector Street Plan that maintains and enhances the walking and bicycling environments with good transit connectivity as redevelopment occurs:

- Maintain two lanes of one-way traffic.
- Maintain on-street parking on one side of the street.
- Enhance bus stops and shelters with nearby redevelopment and further coordination with WeGo Public Transit.
- Provide 10-foot sidewalk with trees in grates on parking side of street.
- Provide 4-foot grass strip with trees planted at regular intervals on non-parking side of street.
- Maintain 6-foot bikeway with 2-foot buffer on one side of the street.



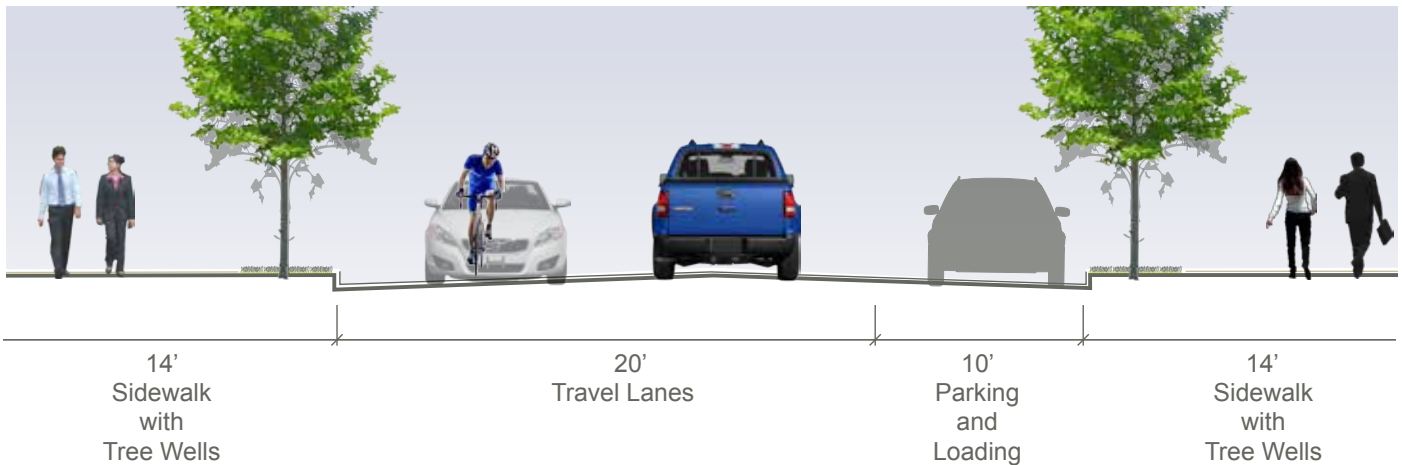
Example of the future street character envisioned. Refer to MCSP interactive map for right-of-way widths in a specific block.

Commercial Streets

These streets serve the high-intensity, mixed-use area in the northern portion of Music Row.

Street design guidance:

- Prioritize needs of people using WeGo Public Transit and people crossing the street to improve safety and reduce conflicts between other users of the street.
- Maintain two lanes of two-way traffic.
- Maintain on-street parking on one side of the street.
- Provide 14-foot sidewalk with trees in grates on both sides of the street.
- Bicyclists share the road except where noted in the WalknBike Plan.



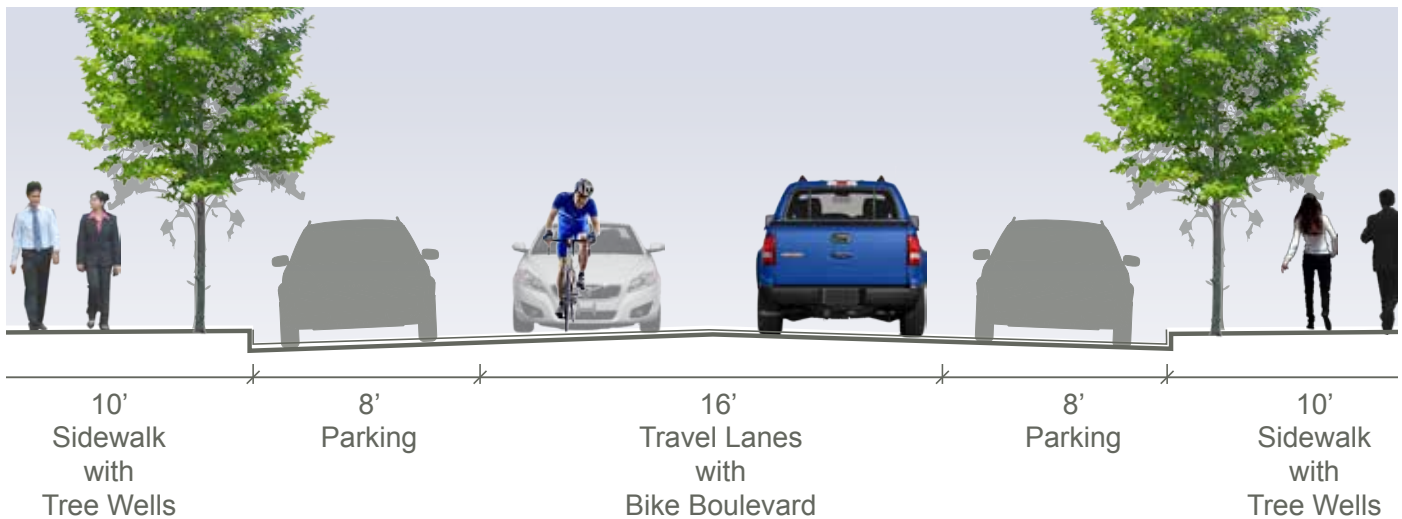
Example of the future street character envisioned. Refer to MCSP interactive map for right-of-way widths in a specific block.

Connector Streets

These streets connect Music Row to the broader community, primarily to the east and west, and accommodate multiple travel modes.

Street design guidance:

- Maintain two lanes of two-way traffic.
- Provide informal on-street parking on both sides of the street.
- Provide 10-foot sidewalk with trees in grates on both sides of the street.
- Bicyclists share the road on these naturally-calmed streets except where noted in the WalknBike Plan.



Example of the future street character envisioned. Refer to MCSP interactive map for right-of-way widths in a specific block.

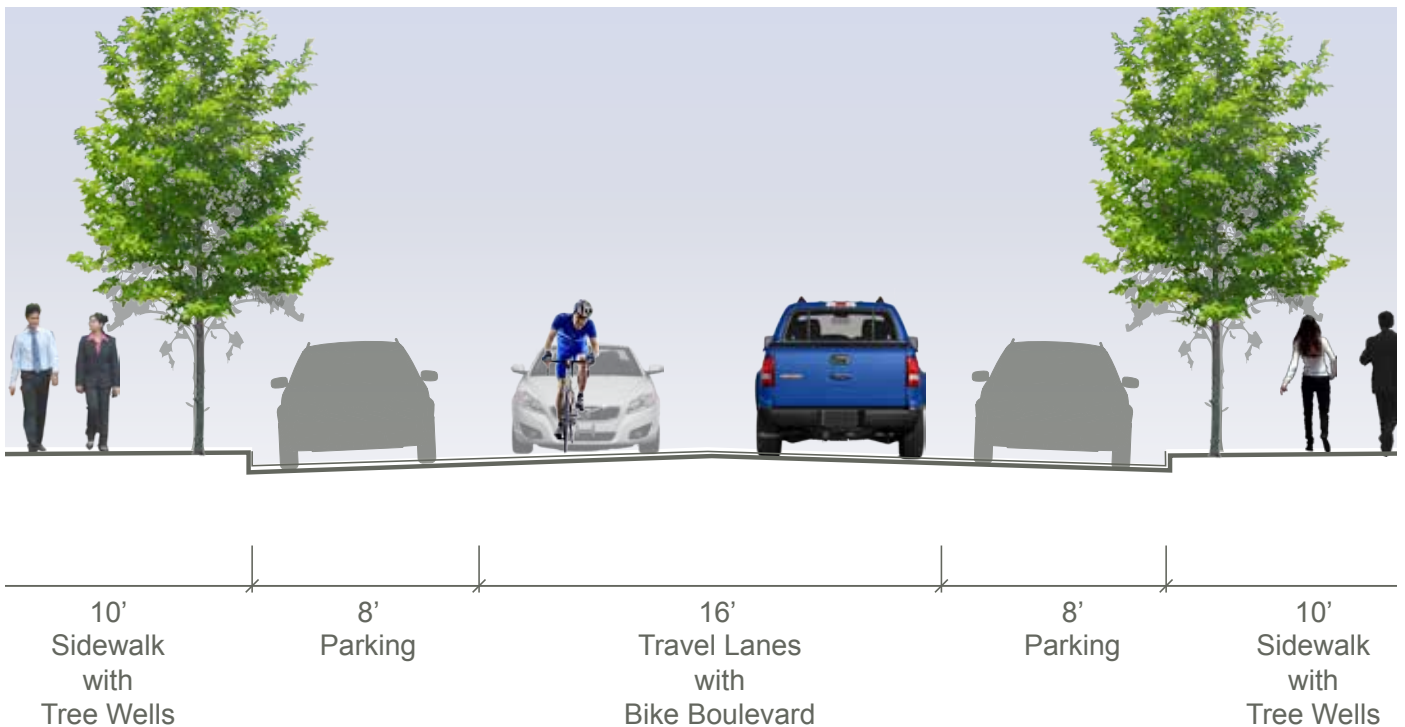
Neighborhood Streets

These streets carry less automobile and through traffic than others on Music Row, providing local access to destinations.

Street design guidance:

- Maintain two lanes of two-way traffic.
- Provide informal on-street parking on both sides of the street.

- Provide 4-foot grass strip with street trees planted at regular intervals.
- Provide 5-foot continuous sidewalk.
- Bicyclists share the road on these naturally-calmed streets except where noted in the WalknBike Plan.



Example of the future street character envisioned. Refer to MCSP interactive map for right-of-way widths in a specific block.

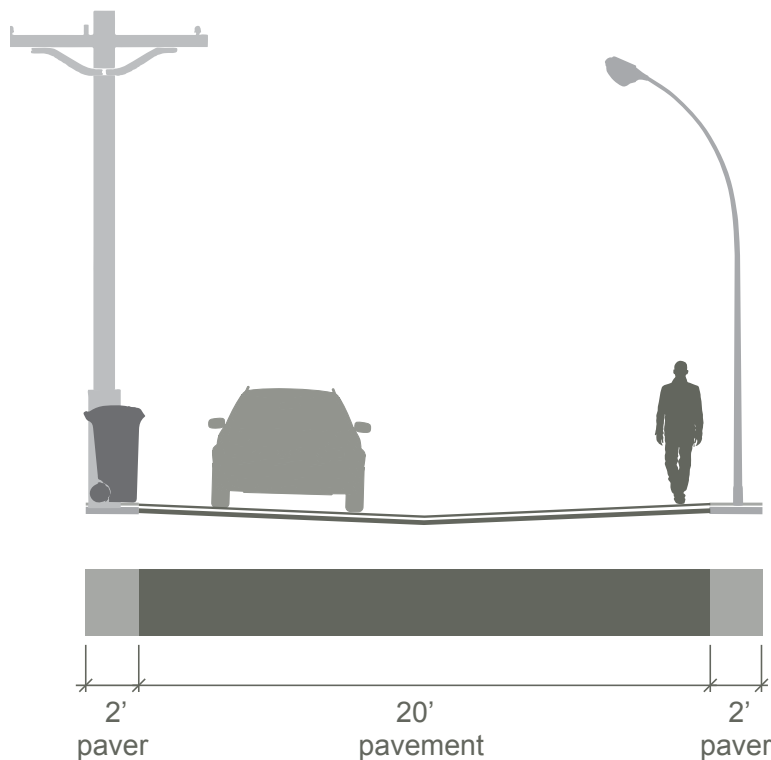
Alleys

Alleys are a critical, highly functioning element of Music Row's infrastructure and where access to parking and deliveries take place day to day. The following guidance for alleys should be considered with a future form-based code to guide redevelopment in the area:

- Design and upgrade alleys to current Metro standards. In Character Areas 2, 3, and 4, consider improving alleys to allow for pedestrian circulation and increased activity.
- Utilize green infrastructure and living alley concepts in alley construction, including shade trees, native plants and rain gardens, porous pavement, way-finding and shared-use signage.
- Provide appropriate lighting for pedestrian activity.
- Permit additional flexibility in building orientation along alleys.
- Consolidate curb cuts along public streets in favor of alley access parking.

Fiber Broadband

The City should prioritize modernizing Music Row's utility infrastructure to be able to accommodate newer, high-tech businesses that are part of the changing music industry. Modernized infrastructure could serve as a marketing and branding feature for attracting new music-related businesses to the district. Areas currently not served by fiber broadband should be considered for micro-trenching, a technique used to deliver high speed internet in other areas of Nashville.



Example of future alley character envisioned with a form-based code.

Curbside Management

Though Music Row businesses often mentioned parking as a challenge, further work is necessary to analyze how parking interacts with larger mobility planning. A parking management study is encouraged to define needs and issues.

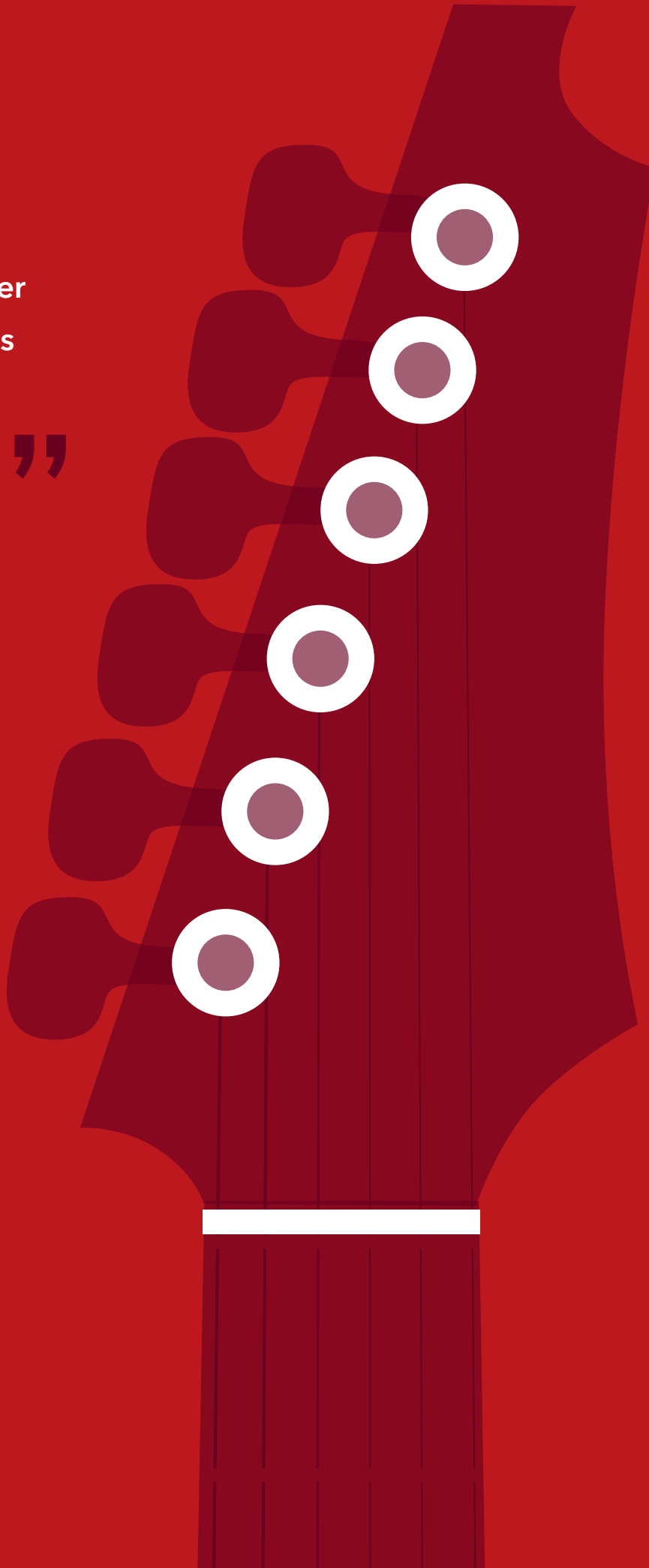
Metro Planning along with Metro Public Works should share the area's mobility and parking vision with the private firm selected to manage Metro-wide parking, with specific attention to the following:

- Prioritize Music Row for installation of parking meters, and charge a rate that encourages 80–85% occupancy through pricing.
 - Consider commercial permit parking with limited parking hours.
 - Encourage Shared Parking through zoning standards and private agreements to maximize efficiency and increase availability of parking up to 50%. To maximize effectiveness, parking management should be centralized through either a government or business association and parking minimums should be eliminated.
 - Coordinate with Vanderbilt University as they transition their annual parking permit to a more robust parking and transportation demand management program outlined in their MoveVU initiative.
 - A Music Row business association should continue to work with Vanderbilt University and Belmont University on transportation options other than parking on Music Row (i.e. daily parking rates for students, faculty and staff, transportation demand management).
 - Create a Music Row-branded transit circulator to provide access to and throughout the area, potentially in collaboration with Vanderbilt and coordinated with WeGo Public Transit routes.
 - Coordinate with WeGo Public Transit to consider enhancing existing service frequencies and stop efficiency in combination with the above strategies.
- WeGo is working on a comprehensive operations analysis. A key early action from nMotion, this project establishes a short term strategy for service changes aimed at building a better bus system. The project will implement service principles from nMotion, creating a simpler system with better frequency, improved span, and faster service.
 - New developments should work with the city's Nashville Connector program on Transportation Management Plans (TMPs) with a focus on reduction of single occupancy vehicles through improved building facilities, employer programs, and policies.



“It'd be just another
river town. Streets
would have a
different sound.”

- Tim McGraw.
Nashville Without You



Action Steps

The following near-term (6–12 months) actions highlight the immediate next steps in order to implement the recommendations in the Music Row Vision Plan.

Action	Lead Agency
Establish a business association that includes all businesses on Music Row. This group should be responsible for representing the varied and diverse interests of the Row, while promoting and managing tourism and championing affordability	Steering Committee
Develop and adopt a form-based code which includes a Transfer of Development Rights program	Planning Department Metropolitan Council Music Row Business Association
Align the public open space recommendations with Parks planning process	Planning Department Parks and Recreation Department
Attract and retain music-related and creative businesses to Music Row	Mayor’s Office of Economic and Community Development Music Row Business Association
Designate Music Row as a Cultural Industry District	Metropolitan Council
Create a Historic Rehab Building Code and designate a liaison in the Department of Codes for Music Row	Metro Historic Zoning Commission Department of Codes
Achieve listing on the National Register of Historic Places and/or Historic Landmark Designation	Eligible Property Owners National Trust for Historic Preservation Metro Historical Commission
Submit street redesign to the Capital Improvements Budget	Planning Department Public Works
Reflect the interim street design guidance in the Major and Collector Street Plan with a form-based code to maintain and enhance the walking and bicycling environments with good transit connectivity as redevelopment occurs	Planning Department
Coordinate Transportation Demand Management Programs with new developments and with Vanderbilt University to reduce curb management pressures on Music Row	Planning Department Nashville Connector Vanderbilt University
Ensure the Music Row’s mobility and parking vision is incorporated into Metro-wide parking management objectives	Planning Department Public Works



“Don't know what
you got till its gone.”

Cinderella. Songwriter,
Thomas Carl Keifer.
Lyrics © Warner/Chappell,
Music Inc.

Appendix A

Music Row Business Survey Methodology and Results

Survey Design (August through September 2018)

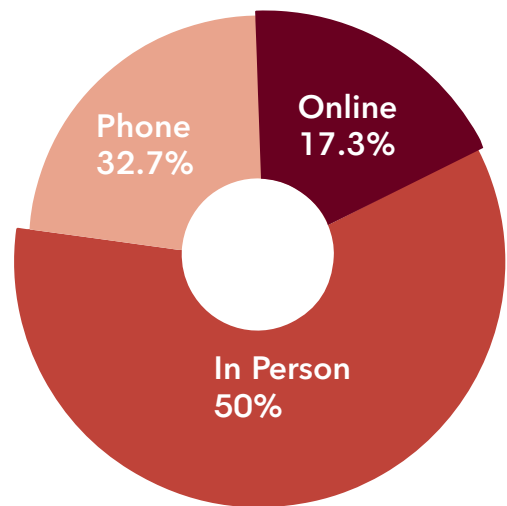
The Metropolitan Government of Nashville & Davidson County Planning Department, in collaboration with Bloomberg Associates, developed the Music Row Business Survey with feedback from the National Trust for Historic Preservation and Middle Tennessee State University Department of Music Recording.

Data Collection (October 2018 through February 2019)

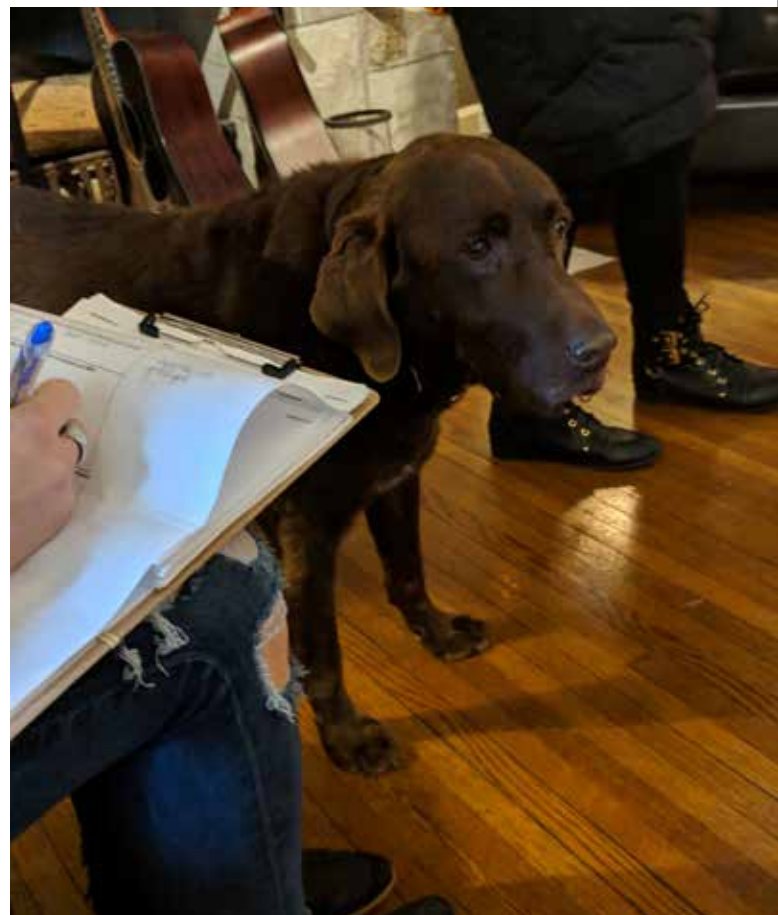
The Planning Department worked with the steering committee on initial outreach for the survey. Guided by business registration information provided by the Property Assessor, the survey team conducted 21 shifts of door-to-door surveying weekdays from 9:00 am to dusk. Surveys were administered by a team of two—Planning Department staff paired with one of four undergraduate research fellows. Due to decreasing daylight hours and colder temperatures, the survey team began administering surveys via phone in January, accepting appointments and providing links to complete the survey online as well.

Analysis (March 2019)

The survey closed to responses on March 1, 2018. Research Fellows entered data and coded responses in addition to providing observations via written reflections and analysis. A test/retest method was used to code open ended responses. Results have a margin of error of +/- 5% at the 95% confidence level.



Survey Response Type



Results Summary

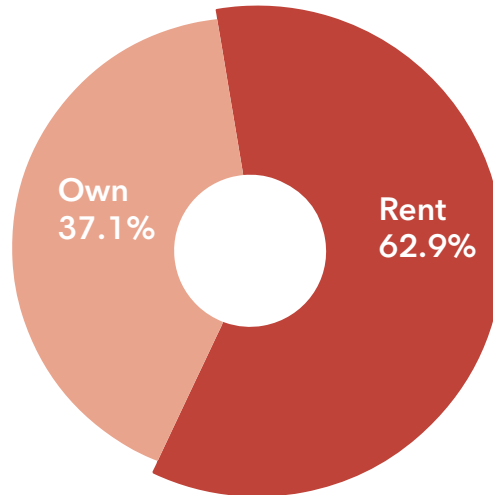
1. How many years has your business been on Music Row?

8 years
Median

15 years
Average

3 years
Mode

2. Do you own or rent?



3. How have your monthly costs changed since you've been on Music Row?

Response	Count	Percent
Consistent	51	25%
Consistent-Long Term Rate	11	5%
Consistent-With Other Costs	2	1%
Total Consistent	64	32%
Increased	47	23%
Increased-Dramatically	29	14%
Increased-Facilities/Utilities	12	6%
Increased-Modestly	14	7%
Increased-With Business Expansion	3	1%
Total Increased	105	52%
No Answer	33	16%
Grand Total	202	

4. What type of business are you in?

After receiving open ended responses, researchers created the following business type categories. In addition to survey responses, researchers utilized online business listings on Google, Yelp, and Better Business Bureau to infer the business type and music-related nature of nonresponsive businesses for a complete snapshot of the current business community on Music Row. For survey responses, a business is considered music-related if they consider at least half of their business either music industry creative or business services.

Business Type	Source			Music-Related	
	Inferred	Survey	Total	Count	Percent
Artist/Music Management/Booking	26	14	40	36	100%
Merchandise	3	2*	5	5	100%
Music Publishing	22*	16*	38	34	100%
Performance Rights Organization	1	2	3	3	100%
Post Production	5	3	8	7	100%
Record Label	9*	6*	15	11	100%
Recording/Production Studio	19	13*	32	30	100%
Rehearsal Space	1	2	3	3	100%
Broadcasting	3	6	9	8	89%
Marketing/PR	8	10	18	14	78%
Instrument Repair/Equipment	2	2	4	3	75%
Hospitality Services	3	4	7	5	71%
Technology: Software/Web	1	8*	9	4	44%
Institution	2	13	15	7	47%
Banking/Finance/Accounting	20*	19*	39	13	33%
Law	14	15	29	8	28%
Insurance	4	2*	6	1	17%
Restaurant/Bar/Tap Room	18	19	37	4	11%
Hair/Makeup/Salon/Spa	12	10	22	2	9%
Architecture/Land Development/Transportation/Real Estate/Construction	18	21*	39	1	3%
Automotive	1	0	1	0	0%
Book Publishing	1	0	1	0	0%
Health and Fitness	2	5	7	0	0%
Healthcare	2*	3*	5	0	0%
Hotel	3	4	7	0	0%
Human Resources	0	1	1	0	0%
Medical Office	18	8	26	0	0%
Residential	1	6	7	0	0%
Retail	4	3	7	0	0%
Security/Law Enforcement	0	1	1	0	0%
Total	223	218	441	199	48%

*Chart includes up to 2 types per business, resulting in a higher count than businesses in the study area (415)

Results Summary

The following more detailed responses are solely from the Music Row Business Survey.

a. What percent of your business is NOT related to the Music Industry?

Only
36.64%

of businesses were not music-related at all.

b. What percent of your business is Music Industry CREATIVE services? (for example recording, songwriting, lighting and sound, instrument repair)

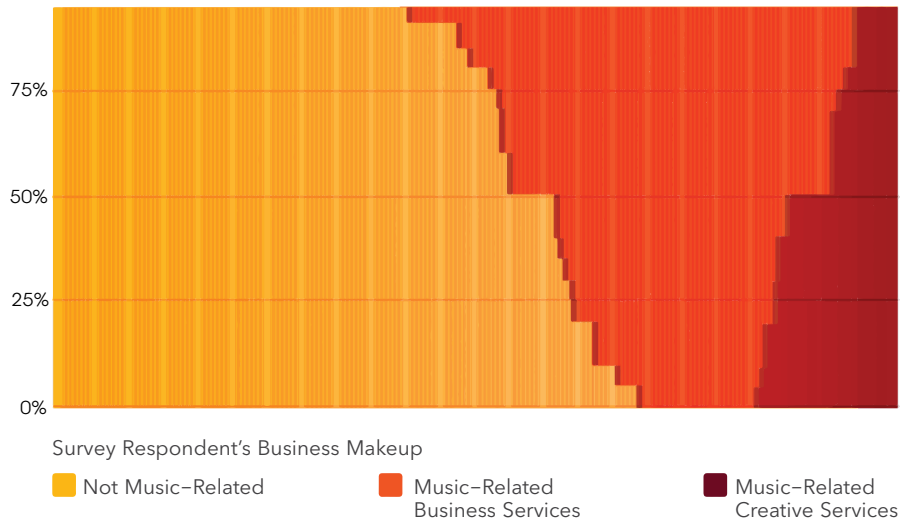
22.28%

of respondents claim some portion of their business is involved in the creation or performance of music.

c. What percent is Music Industry BUSINESS services? (for example publishing, broadcast, marketing, banking, law, hair and makeup)

55.45%

of respondents said that some portion of their business provides services tailored to the music industry.



5. How many employees are located at this address?

Total Estimated Employees of Survey Respondents: **3,750**

Median number of employees: **7**

Average number of employees: **19**

Maximum: **550**

6. Minus employees, about how many daily visitors do you have?

Total estimated daily average visitors of survey respondents: **10,463**

Median number of visitors per business: **7.5**

Mode: **2**

Highest: **1,000**

Lowest: **0**

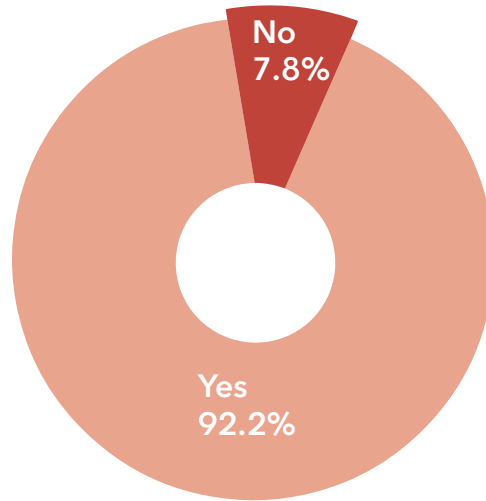
7. Is it important for you to be located on Music Row? Why?

Notes	Music-Related		Non Music-Related		Total	
	Mentions	Percent	Mentions	Percent	Mentions	Percent
Not Important but mentioned perks of...						
Central Location/Convenience	2	2%	2	2%	4	2%
Foot Traffic	0	0%	2	2%	2	1%
Music Industry	0	0%	1	1%	1	0%
Visibility	0	0%	1	1%	1	0%
Reasons why it is important						
Atmosphere/History	12	11%	6	6%	18	9%
Central Location/Convenience	32	30%	48	51%	80	40%
Character/Built Environment	0	0%	6	6%	6	3%
Foot Traffic	0	0%	6	6%	6	3%
Music Industry	56	53%	14	15%	70	35%
No Answer	0	0%	3	3%	3	1%
Own Building	0	0%	1	1%	1	0%
Visibility	4	4%	5	5%	9	4%
Total Responses	106		95		201	

Chart includes up to 3 reasons per response, but not all respondents provided explanation, resulting in a different grand total.

Results Summary

8. Do you plan to stay on Music Row?



9. Who do you interact with on Music Row and are they critical to your work?

Type	Mentions	Percent
Music Industry (All or General)	39	15%
Publishers	22	9%
Performance Rights Organization	3	1%
Management	4	2%
Labels	20	8%
Artists	36	14%
Broadcasting	1	0%
Total Direct Music-Related	125	49%
Charity	3	1%
Clients	24	9%
Financial Services	4	2%
Law	1	0%
Neighbors-Engaged	3	1%
Neighbors-Uninvolved	21	8%
Print/Media Services	1	0%
Residents	10	4%
Restaurants	10	4%
Services	3	1%
Similar Businesses	16	6%
Universities	2	1%
No One	30	12%
Total Mentions	253	

10. What obstacles or challenges do you face in order to remain on Music Row?

	Music-Related Businesses Challenges		Not Music-Related Business Challenges		Total	
	Mentions	Percent	Mentions	Percent	Mentions	Percent
Development Pressures	21	16%	18	13%	39	15%
Rent	12	9%	12	9%	24	9%
General Affordability	9	7%	4	3%	13	5%
Building Inadequate	9	7%	7	5%	16	6%
Business Success	8	6%	7	5%	15	6%
Taxes	5	4%	3	2%	8	3%
Affordability Total	64	50%	51	38%	115	44%
Congestion	12	9%	21	16%	33	13%
Curbside Management	31	24%	28	21%	59	22%
Safety	2	2%	1	1%	3	1%
Mobility Total	45	35%	50	37%	95	36%
Crime/Safety	3	2%	5	4%	8	3%
Character	5	4%	2	1%	7	3%
Character Total	8	6%	7	5%	15	6%
No Challenge	11	9%	27	20%	38	14%
Total Mentions	128		135		263	

Chart includes up to 4 challenges per response, resulting in a higher count than businesses in the study area (415).

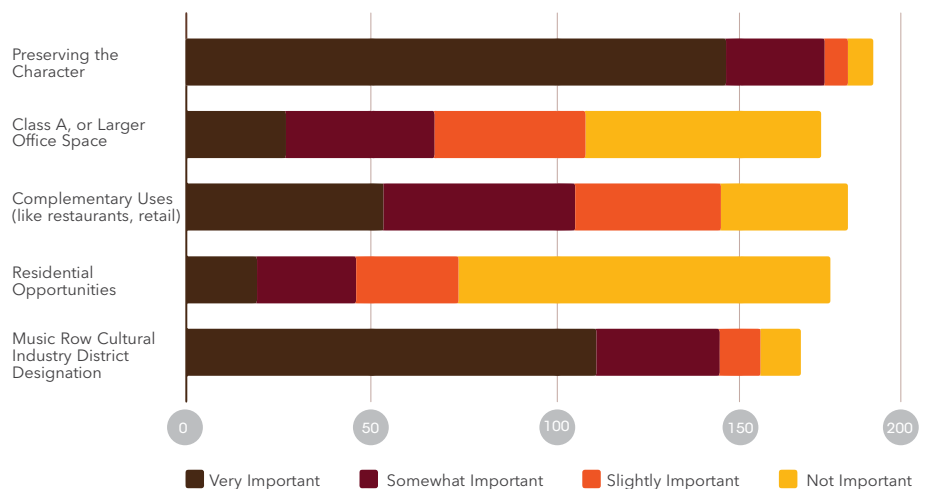
Results Summary

11. What do you think would help you or other music industry businesses stay here?

Topic	Mentions
Curbside Management	36
Preserve Character	25
Historic and Cultural Preservation	17
Community Organization	13
Property Tax	12
Rent Assistance (lower, lease negotiations)	12
Other	10
Nothing	9
Music-Related Businesses	7
Marketing	6
Address Traffic	5
Transit	3
Better Office Space	3
Easier Codes	3
Infrastructure	3
Rent Control	3
Tax Incentives	3
Small Business Loans	2
Fiber Broadband	1
No Answer	31
Not Applicable	8

12. How important are the following when you think about the future of Music Row?

The elements were presented in the same order each time, so there is a potential response bias favoring "Preserving the Character" over "Class A Office Space". Open ended responses in this section support this idea, with many mentioning the balance between the two elements is important.



13. How and when do you interact with the city?

Response	Count	Percent
No Answer	64	31.68%
Rarely/Never	41	20.30%
Not Applicable	26	12.87%
Boards or Commissions	20	9.90%
Permits	13	6.44%
Charities	10	4.95%
Clients	5	2.48%
Council	4	1.98%
Public Works	4	1.98%
Chamber of Commerce	3	1.49%
Tourism	3	1.49%
Property Tax Appeal	2	0.99%
Voting	2	0.99%
Downtown Parntership	1	0.50%
Inspections	1	0.50%
Noise Complaints	1	0.50%
Taxes	1	0.50%
Transit	1	0.50%
Total Responses	202	

14. Is there anything else you'd like us to know?

Responses generally summarized previous question answers and were incorporated into those response codes.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

“Everybody from Bob Dylan to you-name-it has come here to do something great.”

- Mike Curb
Founder of Curb Records on Music Row

Appendix B

Music Row Planning Process and Community Outreach

The Music Row Vision Plan is based upon thoughts, ideas, and suggestions heard from an extensive planning process spanning multiple years. The conversations shared amongst various interest groups, including Music Row business owners, representatives of the music industry, property owners and residents on and near Music Row, preservationists and historians, members of the development community, numerous stakeholders, and consultant groups, helped to inform the basis of the plan.

The Planning Department became involved when, following the demolition of several structures, the community, along with preservationists, music industry professionals, and the public at large voiced a collective desire to further understand Music Row as an authentic cultural resource worth saving. In light of public outcry, the Planning Commission took action and voted unanimously to defer or disapprove rezoning requests pending a further study of the area. Initially, Planning staff sought to build consensus around common goals regarding land use policy. In most areas, Planning would generally work with the community to create guidance on policy to inform future rezoning, development and infrastructure projects. The unique and complex nature of Music Row broadened the scope of the study to take into account internal and external pressures affecting

music-related businesses. Those pressures led Planning to form a Steering Committee to guide in the decision-making process, generate ideas, and serve as a sounding board for solutions.

The Steering Committee established common ground on specific themes, challenges, and priorities faced by businesses on Music Row. The committee consisted of a core group of eighteen individuals and represented the general make-up of Music Row. Representation was balanced among music industry folks, large and small businesses, property owners, institutions, and experts in the fields of real estate, development, and history. The committee members served as ambassadors in our outreach to the music industry, business and neighborhood leadership, and development world.

The anticipated outcome of the project was to create a holistic Vision Plan for Music Row to serve as an umbrella document, containing all of the information generated to date. The plan was envisioned as a toolbox that would enable a sustainable future for Music Row. The toolbox would include a common Vision and Master Plan, updated land use, transportation, and infrastructure policy, historic preservation tools, new zoning with Transferable Development Rights, tools for value capture, and recommendations for new programs, organizations, incentives, and resources.



An evidence-based approach

In order to support the broad and extensive Music Row Vision Plan, it was important to supplement the planning initiative with key evidence-based analyses. The Music Row Business Survey was a survey conducted by the Planning Department with technical assistance provided through partnership with Bloomberg Associates. The Music Row Business Survey was initiated to gain an in-depth understanding of specific challenges and priorities of businesses. The survey was a personalized and data-driven approach to identifying common needs faced by those that live, work and plan on Music Row. Over 200 responses were collected in person, online, and via phone and the information gathered helped to fine tune appropriate tools and strategies in the policy recommendations.

Metro Planning also procured an economic consultant, Economic and Planning Systems, to perform a feasibility analysis of a transferable development rights (TDR) program for Music Row and Metro at-large. This critical study evaluated the current future economic real estate market and assessed TDR as a mechanism for incentivizing preservation of historic structures and managing growth by redirecting development away from existing historic resources along Music Row. Outcomes of the TDR study included providing a framework for development rights transactions to occur that benefit both sending and receiving sites and creating a predictable and streamlined administrative process for developers seeking to build on Music Row as well as those seeking to purchase TDRs. A comprehensive report was provided documenting the process, data, research, analysis, methodology, and final recommendations to Metro Planning.



An evidence-based approach

2015

January 12 – Following demolition of several structures and amid growing uncertainty about Music Row’s future, the National Trust for Historic Preservation designates Music Row a National Treasure.

February 12 – The Planning Commission votes unanimously to defer or disapprove any rezoning requests along Music Row, pending further study.

April 2015 – November 2016 – The National Trust for Historic Preservation begins documentation of the historical assets of Music Row and releases its findings in late 2015. The final report, Multiple Property Documentation form (MPDF), is approved by the Tennessee Historical Commission and the National Park Service.

2016

January–May – The National Trust for Historic Preservation and consultant Randall Gross Development Economics conduct and release “A New Vision for Music Row: Recommendations and Strategies to create a Cultural Industry District.”

October 6 – The National Trust for Historic Preservation, Planning Department, Historical Commission, and Music Row South Association, with additional support from the Arts and Business Council, host the Music Row Cultural Industry District Summit to collect implementation ideas for Music Row’s future.

October 2015 – December 2016 – Planning staff holds a series of meetings with community stakeholders and the Planning Commission adopts a Music Row Detailed Design Plan to serve as a policy framework for redevelopment in Music Row.

2017

January – May – The Planning Department holds multiple stakeholder meetings to evaluate the potential of form-based zoning as a development tool.

June – October – Metro begins procurement process for an economic consultant to study Transfer of Development Rights’ feasibility as a preservation tool.

November 28 – The Planning Department, the National Trust for Historic Preservation, and consultant Economic and Planning Systems, Inc. present a November 28, 2017 progress report to community stakeholders on possible implementation tools for Music Row, including a study of Transferable Development Rights, a possible Business Improvement District, and an overall Master Plan.

2018

February – Planning staff meets with the Steering Committee working group to evaluate an analysis of Music Row public infrastructure including streets, alleyways, and parking in order to provide guidance on a future Master Plan.

September – Metro Planning’s economic consultant, Economic and Planning Systems, produces a draft report, Music Row Transfer of Development Rights Feasibility Study, with a summary of recommendations. The analysis serves as the critical foundation for using transfer of development rights as a mechanism for protecting historical and cultural assets within Music Row.

October – Metro Planning, in collaboration with Bloomberg Associates and Middle Tennessee State University’s Department of Recording Industry, initiates the Music Row Business Survey, a door-to-door survey to gain an understanding of the challenges and priorities of Music Row businesses. The analysis includes over 200 responses to date, a response rate that is high enough to draw reliable conclusions, and will be included in the Music Row Plan. Business owners and managers in the study shared their thoughts in person, online, and via phone.

December – Metro Planning forms a Blue Ribbon Committee, a working group of music industry leaders, historians, and architects to analyze and identify key buildings that contribute to Music Row’s overall cultural identity. These properties, essential to telling the story of Music Row and the music industry in Nashville, will serve as sending sites for a Transfer of Development Rights program.

December 4 – Planning staff meets with the Steering Committee to provide a progress update on the Music Row Business Survey and “Blue Ribbon” Committee, which are providing two critical analyses that will inform the Planning Study. Staff presents an update on the policy areas and draft Music Row Vision Plan and also proposes a timeline for community engagement starting in January as well as an April date for adoption of the Music Row Vision Plan by the Planning Commission.

2019

February 20 – Metro planners share an Executive Summary report, draft Music Row Framework Plan, and elements to consider for updating Community Character Policy for the Music Row Vision Plan with the Steering Committee members. Members comment on and establish consensus around the primary building blocks for the Music Row Plan. Planning staff updates Steering Committee members with a progress report on the Music Row Business Survey and “Blue Ribbon” Committee.

April 22 – Planners host a community meeting to present the draft Music Row Vision Plan.

June – Music Row Vision Plan is presented to Planning Commission

List of Previous Plans and Studies

The following planning studies have shaped this area since the mid-1950’s:

- 1963** Edgehill Urban Renewal Plan (MDHA)
- University Center Redevelopment Plan
- 1997** Music Row Planning and Design Study (MDHA)
- 1997** South Music Row South Conservation Zoning Overlay (Metro Historic)
- 1998** Arts Center Redevelopment Plan (MDHA)
- 2001** Music Row Urban Design Overlay (Metro Planning)
- 2003–5** Edgehill Neighborhood Detailed Design Plan (Metro Planning/NCDC)
- 2012** Midtown Study (Metro Planning)
- 2015** NashvilleNext General Plan & The Green Hills–Midtown Community Plan (Metro Planning)



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