A photograph of the Nashville skyline, featuring several skyscrapers and a bridge in the foreground. The sky is overcast. The text is overlaid on the image.

Welcome to **Profile of Struggling People in Nashville**

Release of the 9th Annual

Community Needs Evaluation

February 21, 2018

Metropolitan Social Services



Welcome from
Catholic Charities
of Tennessee

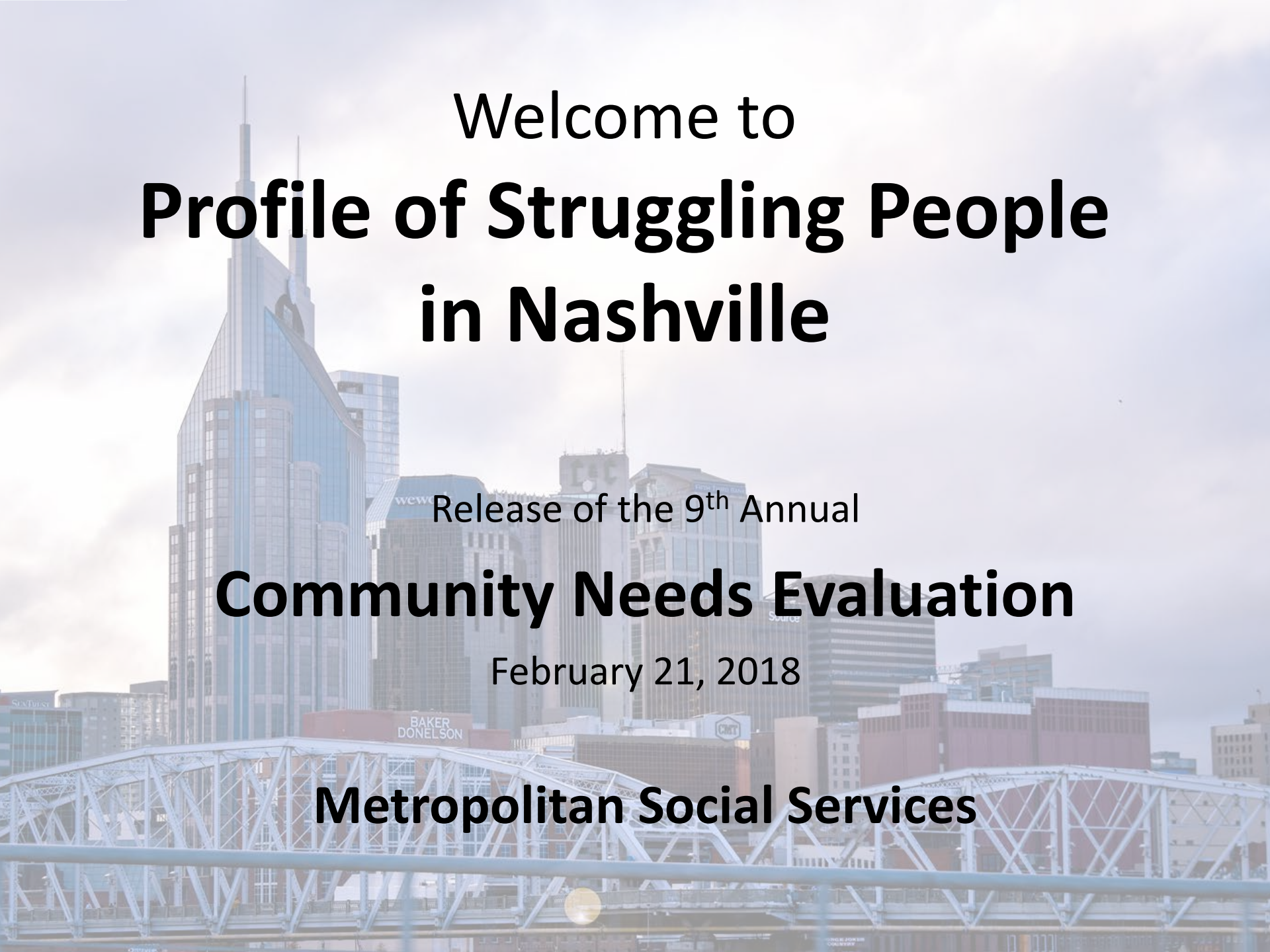
Pam Russo
Executive Director



Introduction and Welcome from
Metropolitan Social Services

Renee Pratt, Executive Director

Pastor William Harris, Board Chairman

A photograph of the Nashville skyline, featuring several skyscrapers and a bridge in the foreground. The sky is overcast. The text is overlaid on the image.

Welcome to **Profile of Struggling People in Nashville**

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Metropolitan Social Services

Metropolitan Social Services Overview of Direct Services



Social Services Mission Statement and Values

Mission Statement

Metropolitan Social Services assesses and documents the patterns of poverty and seeks solutions that promote a positive impact on the most vulnerable people in Davidson County.

We Value:

- **Commitment to Excellence**
- **Community Focus**
- **Compassion**

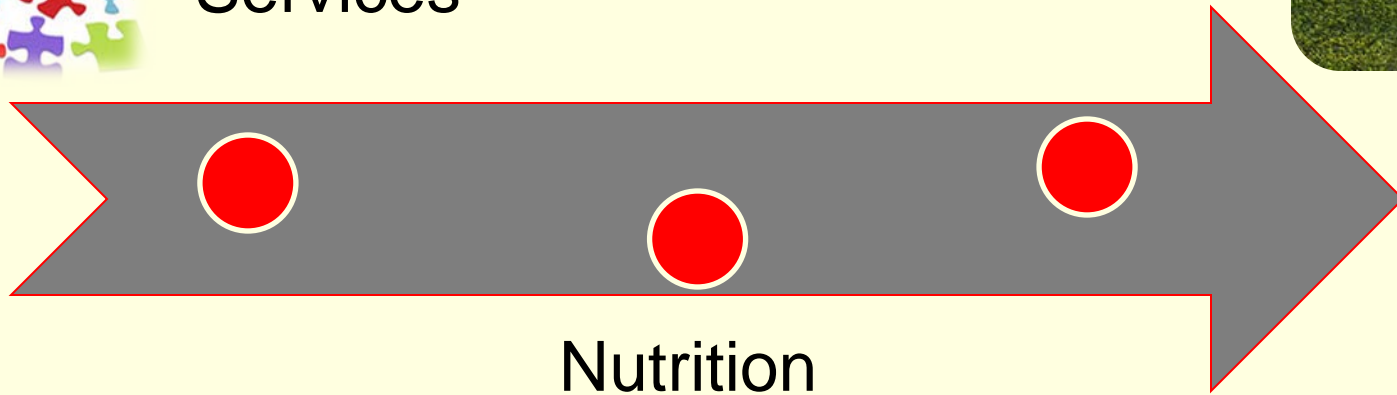
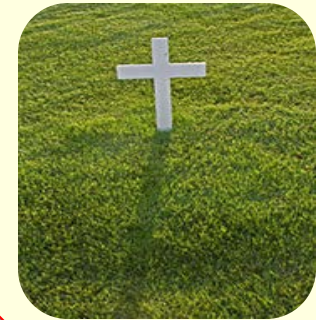


Services for various stages in life



Family
Support
Services

Burial
Services



Nutrition
Services



What we do – MSS services

- **Information & Resources**
- **Case Management**
- **Life Management Skills Classes**
- **Senior Nutrition**
- **Burial Services**

Family Support Services: Information and Resources

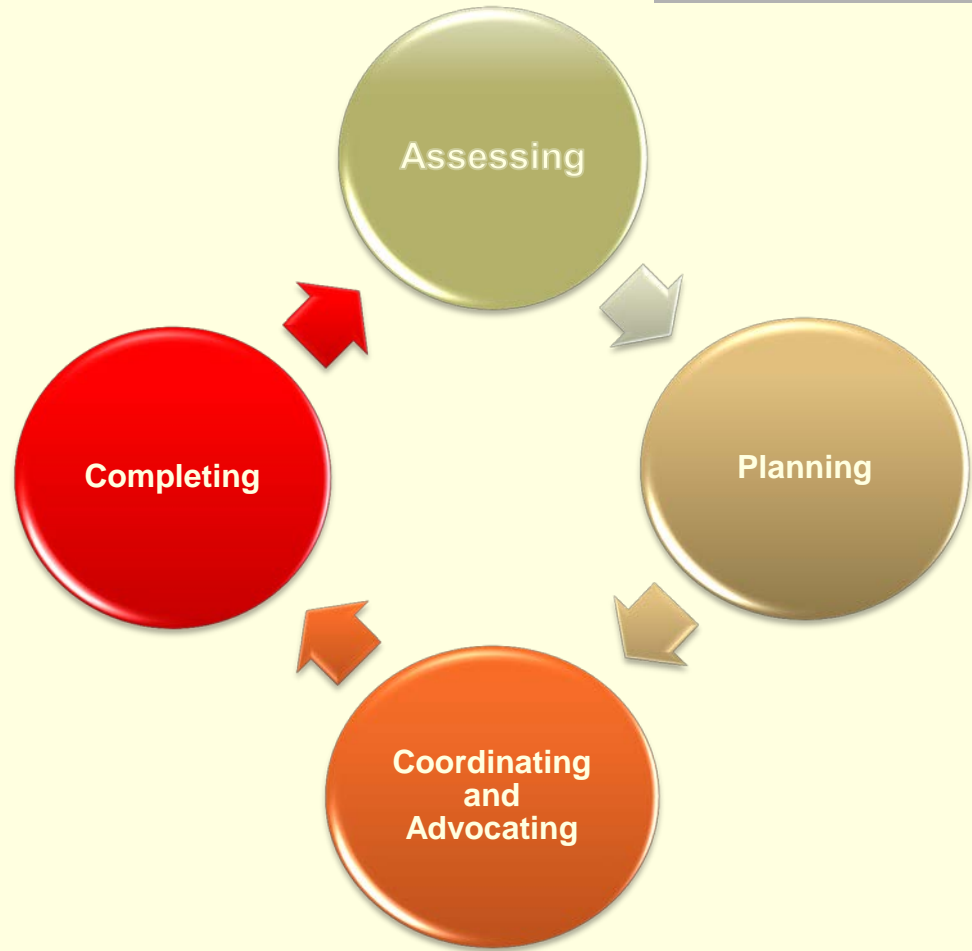


Family Support Services cont. Case Management?



Family Support Services (continued)

Case Management



Family Support Services cont.

Life Management Skills Classes



Senior Nutrition Program

- Who is the program for?
- How is the program administered?



Senior Nutrition Program cont.

Site locations:

- Cohn Adult Learning Center
- East Park Community Center
- Elizabeth Community Center
- Hadley Community Center
- Chippington Towers I & II
- Cumberland View Towers
- Dandridge Towers
- Trevecca Towers I & II
- Old Hickory Towers
- Nashville Christian Towers
- Madison Senior Station
- Hickory Hollow Towers
- Fifty Forward Bordeaux
- Riverwood Towers



Indigent Burial Program



- Metro Social Services coordinates and funds the burial of deceased persons who did not leave sufficient resources to cover the cost of their burial expenses. Cremation is also available.
- Who can apply



Other Program Services

Community Locations:

**Metro Nashville Downtown
Public Library**

Salvation Army Paragon Mills



Other Program Services cont.

Partnering Agencies:

- Financial Empowerment Center
- Public Defender's Office
- HERO program in MNPS
- Office of Conservatorship Management
- Jean Crowe Advocacy Center
- Goodwill Industries



How to get in touch with us...

Visit, call or email us @

Metropolitan Social Services

800 2nd Avenue North, Suite 100

Nashville, Tennessee 37201

Telephone (615) 862-6432

Fax (615) 880-2535

SocialServices@nashville.gov





2017
Community Needs Evaluation
9th Annual Edition



Metropolitan Social Services
Planning, Coordination and Social Data Analysis
800 Second Avenue North, Nashville, Tennessee 37201

Direct Services – 615-862-6458
Planning, Coordination and Social Data Analysis – 615-862-6494



Purpose of a

Community Needs Evaluation

- Gathers and analyzes data.
- Created for a **community – public resource**.
- Focus on targeted population (low-income and disadvantaged).
- Enhance understanding of the population.
- Not a “job description” for any organization.
- Provide **knowledge** to policy makers, service providers, advocates and the public and result in better decisions.



What kind of data is in the CNE?

- **Annual Grassroots Community Survey**
- **United Way's 2-1-1 Call Data**
- **U.S. Census Bureau – American Community Survey**
 - Single year, 2016
 - 5-Year Summary, 2012-2016

Local/State/Federal Agency Data

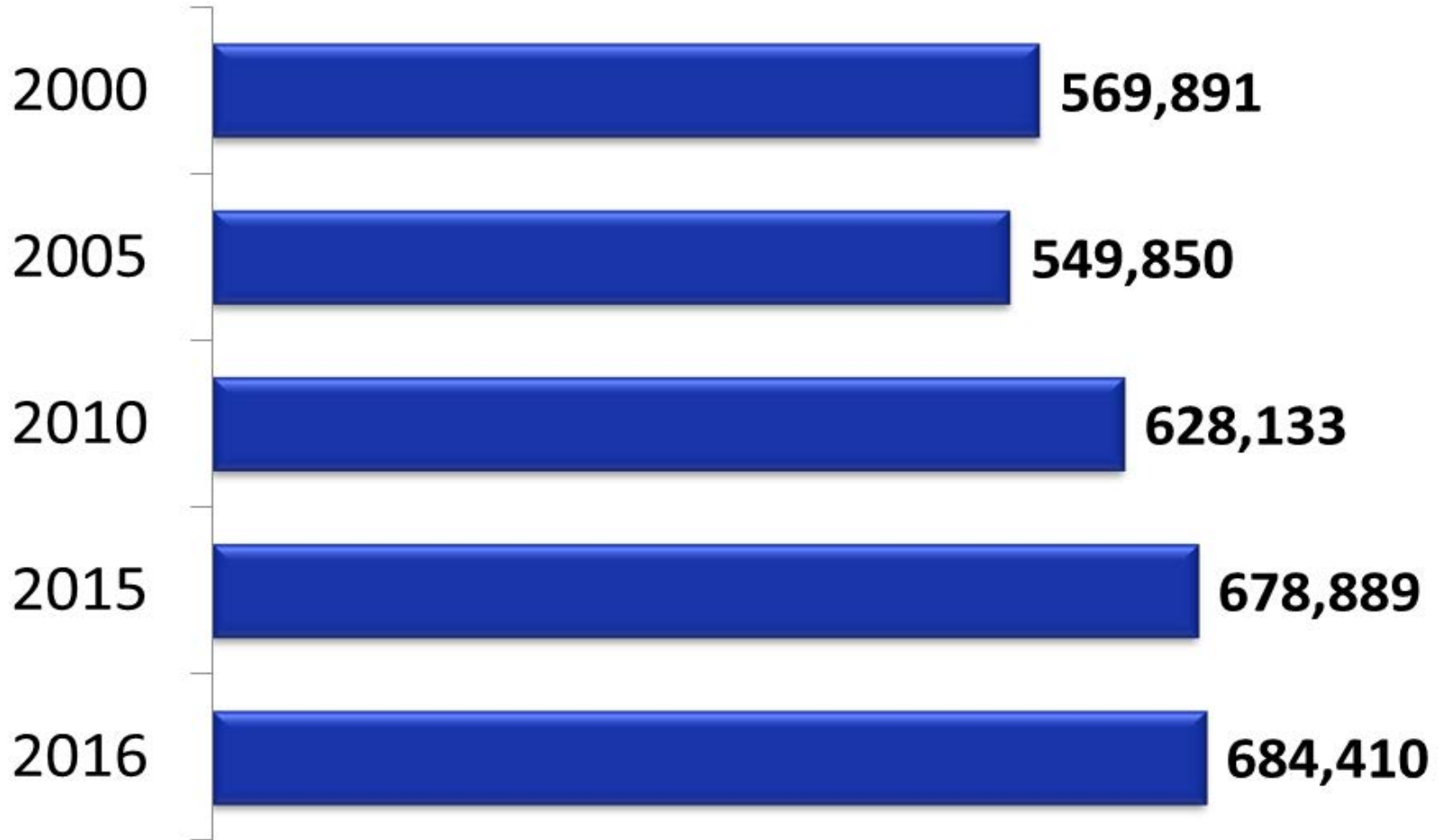
Other Research



Demographic and Social Profile



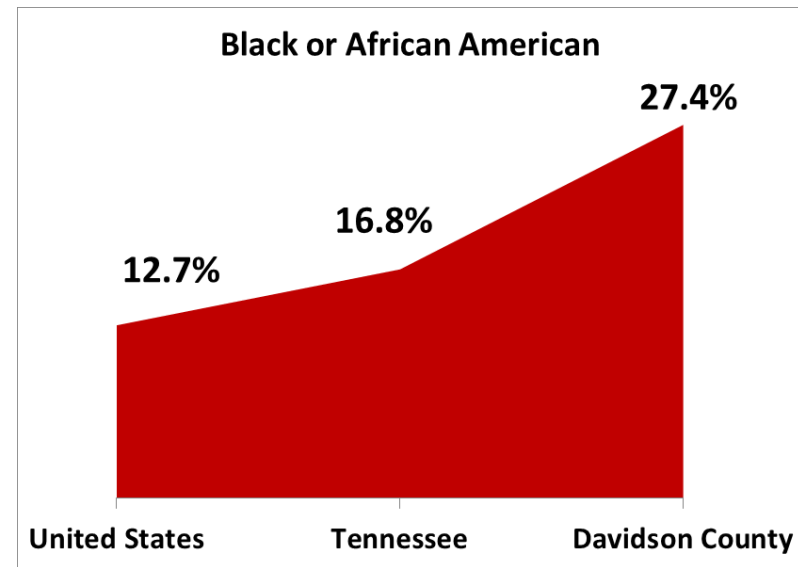
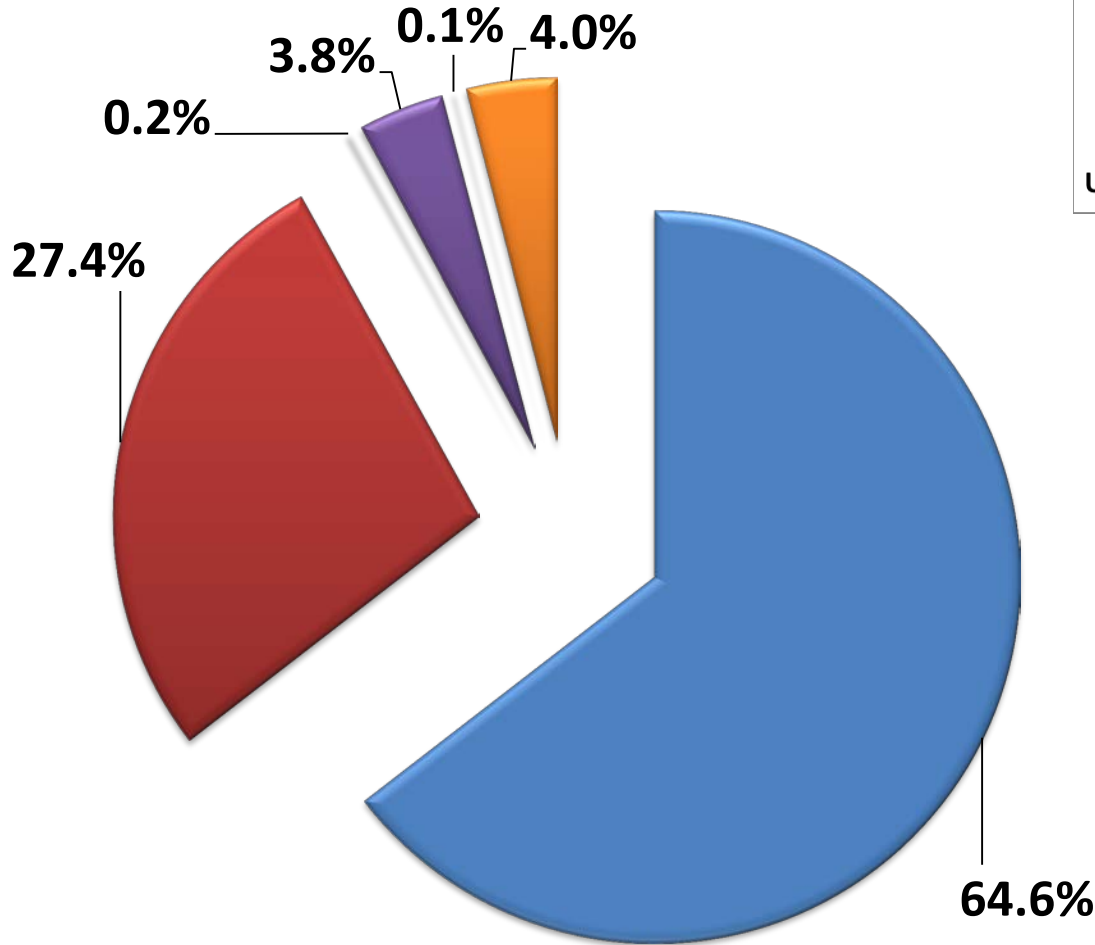
Davidson County Total Population



20% increase across 16 years = 1.3% per year

Racial Composition

Davidson County, 2016

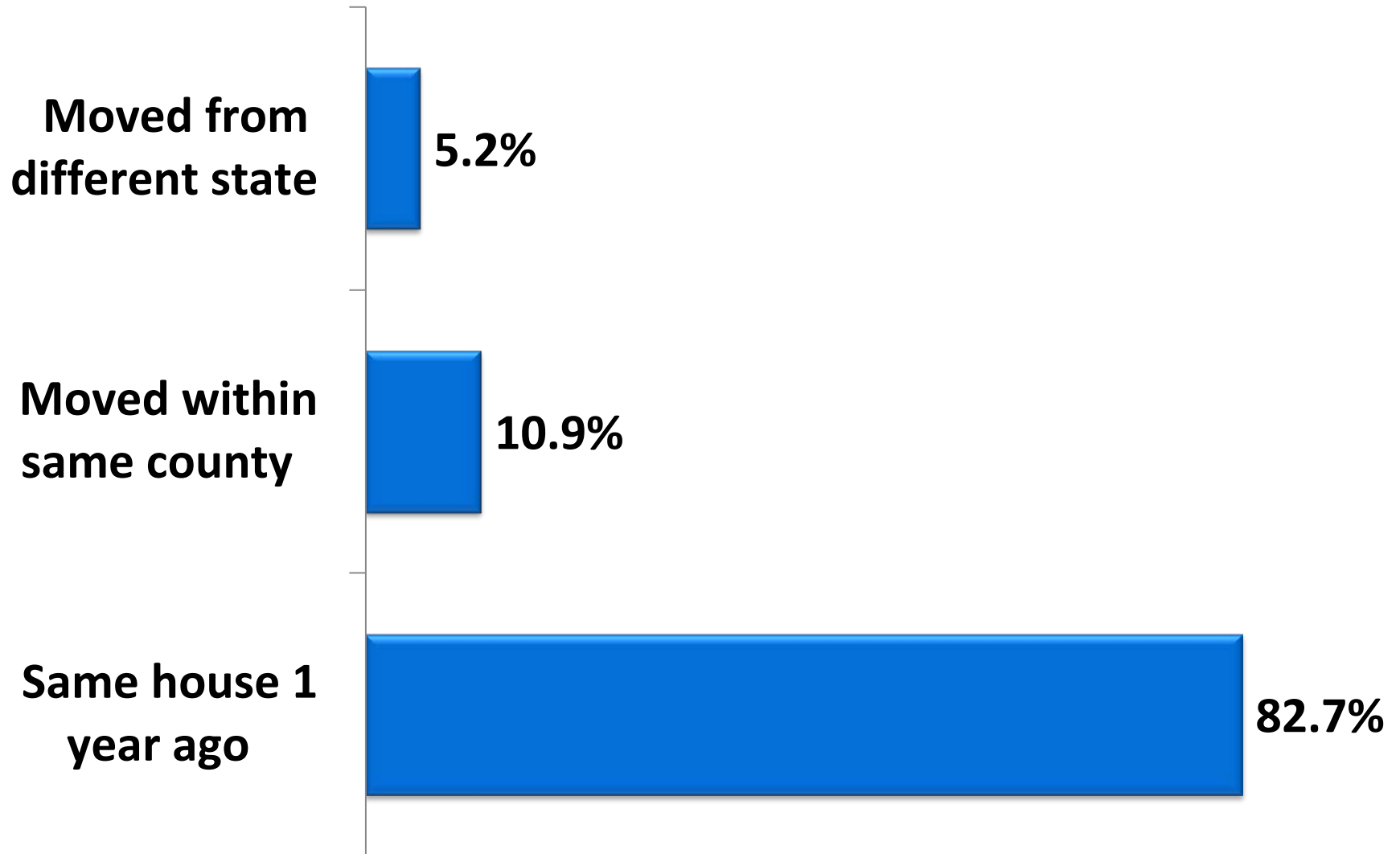


- White
- Black or African American
- American Indian and Alaska Native
- Asian
- Native Hawaiian and Other Pacific Islander
- Other/More than one race



Geographic Mobility During Year

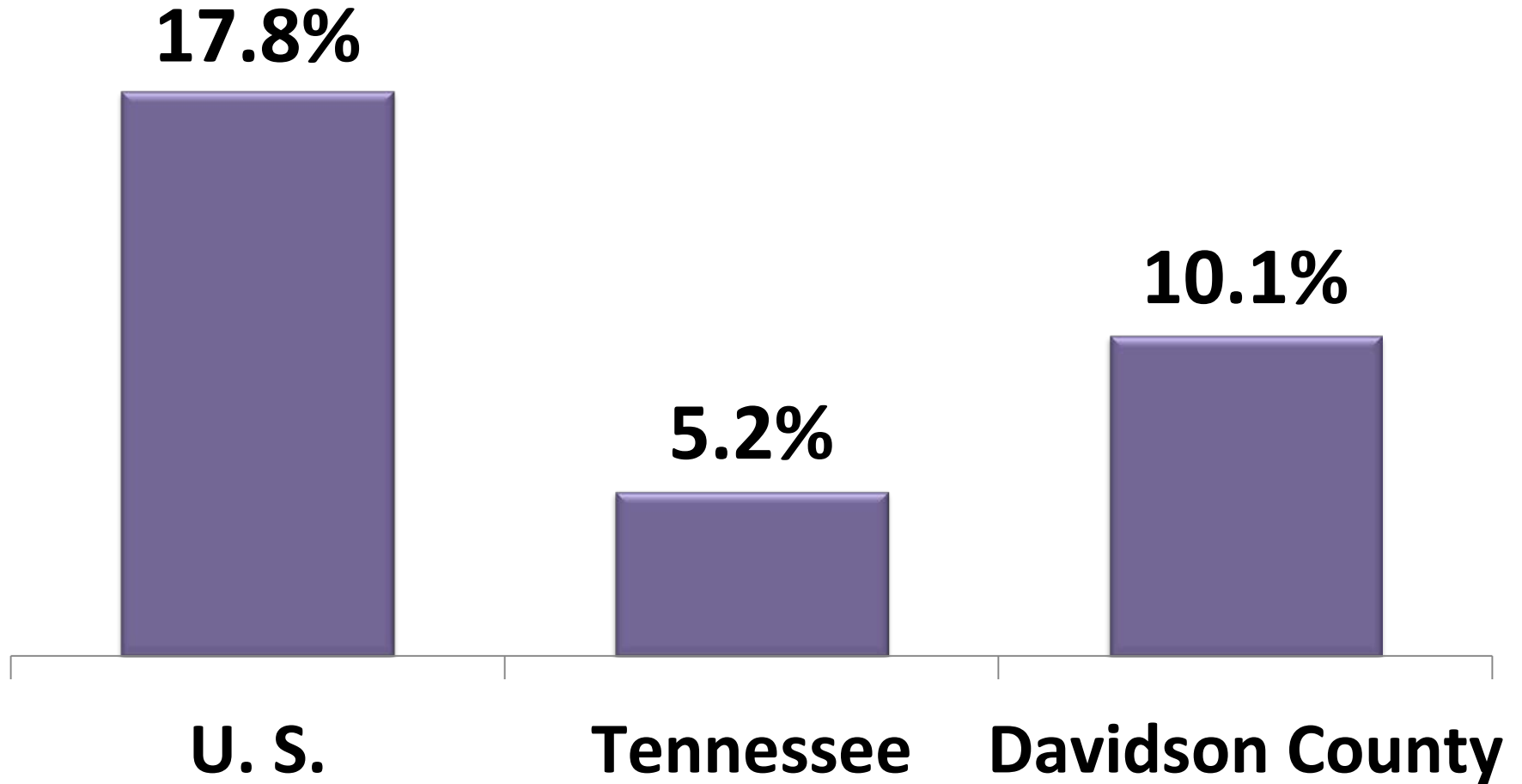
Davidson County, 2016





Hispanic Ethnicity

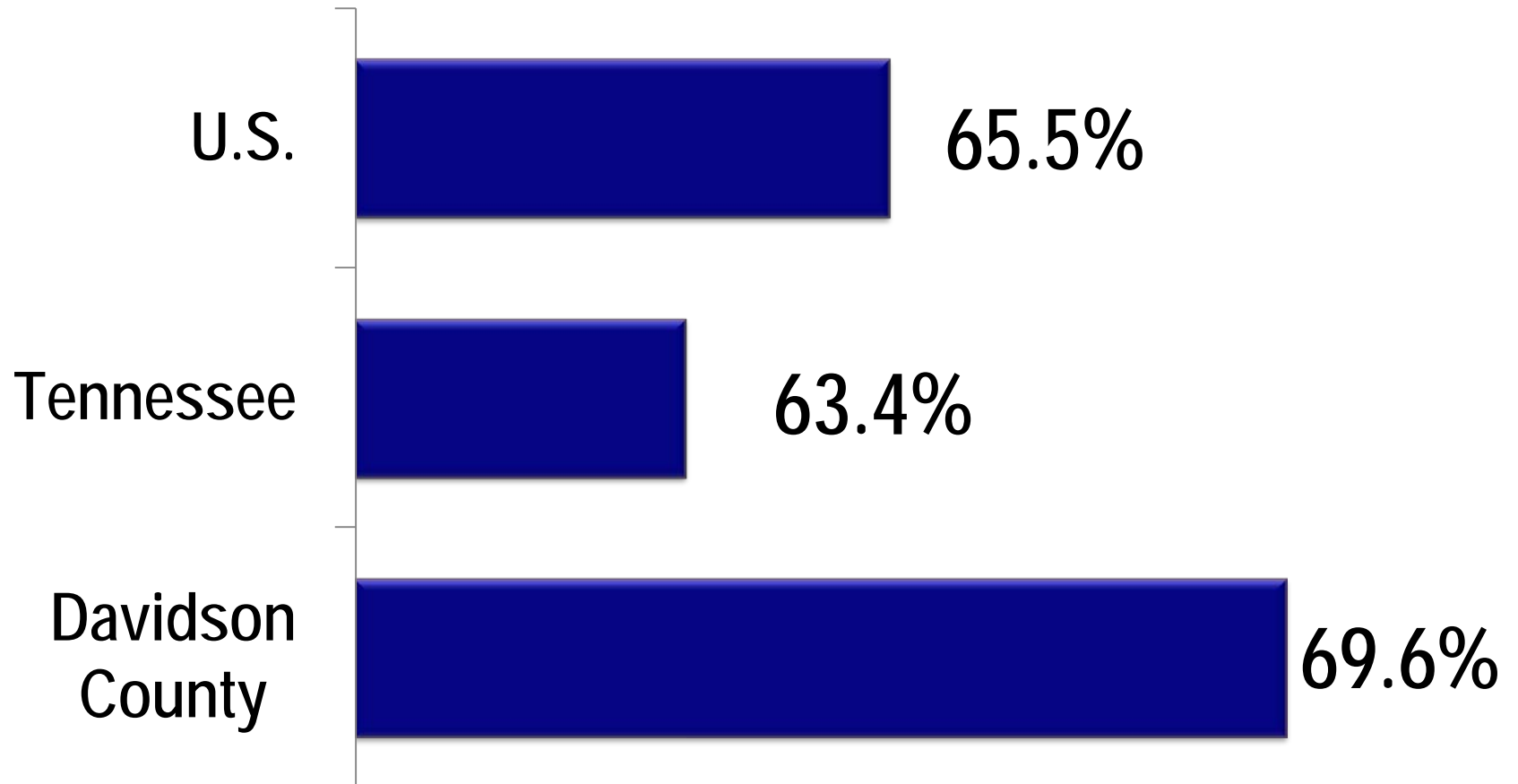
U.S., Tennessee, Davidson County, 2016





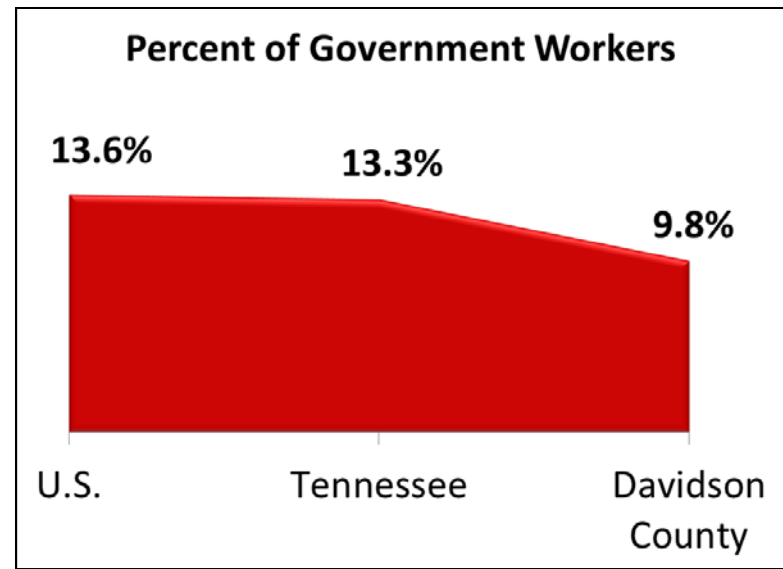
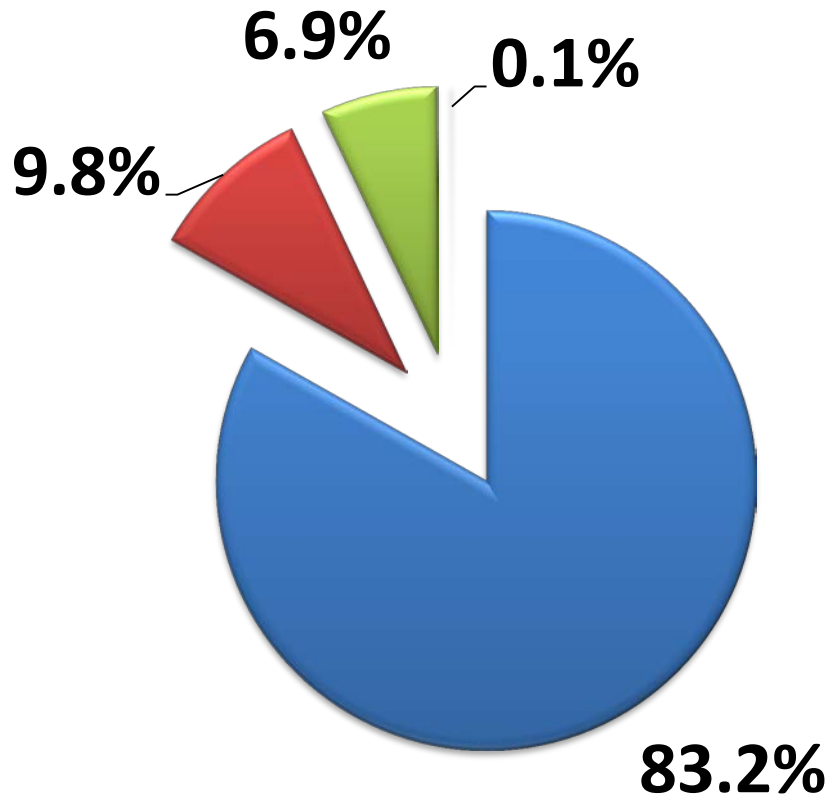
All Parents in Workforce of Children Under Age 6

U.S., Tennessee, Davidson County, 2016



Types of Employers

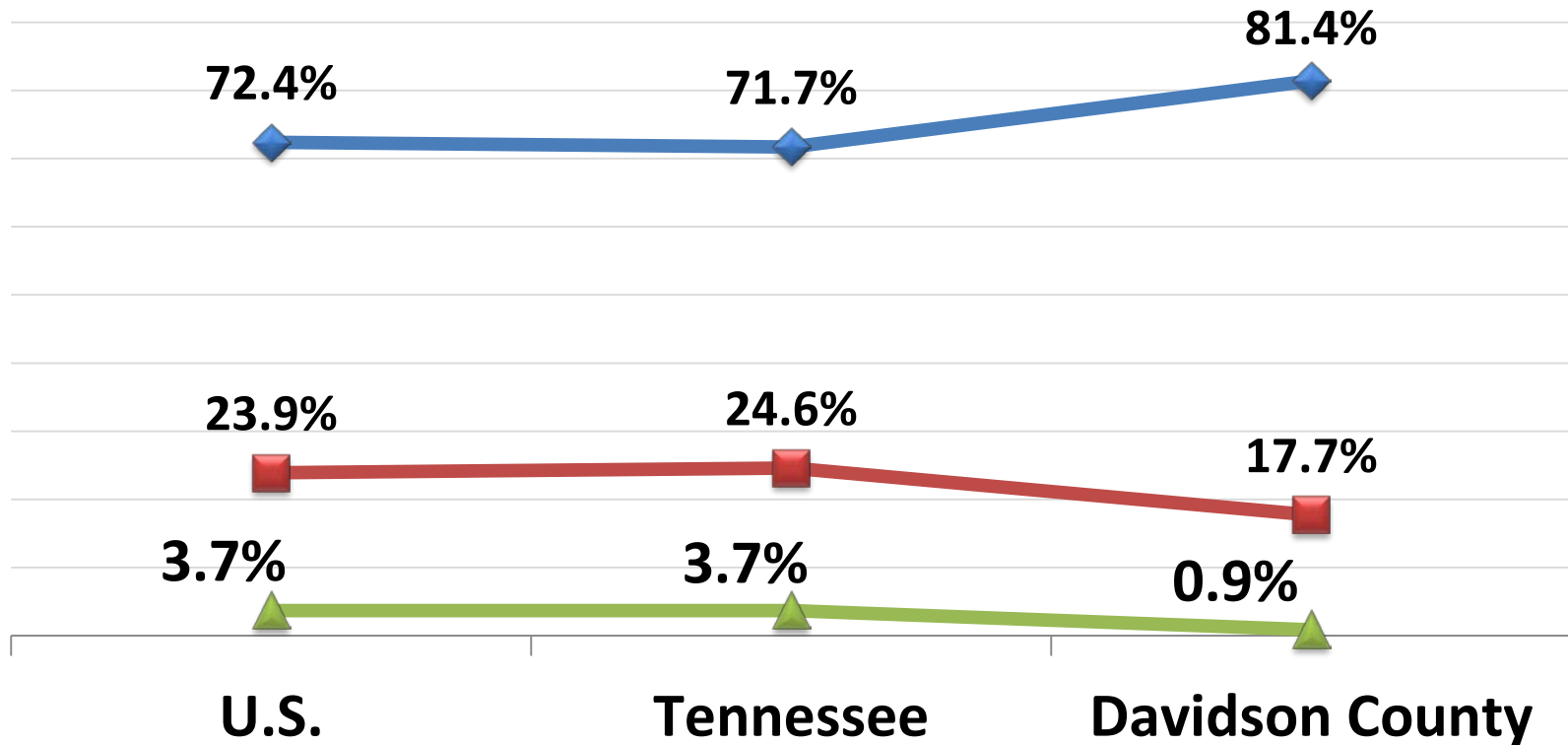
Davidson County, 2016



- Private wage and salary workers
- Government workers
- Self-employed in own not incorporated business workers
- Unpaid family workers

Place of Work

U.S., Tennessee, Davidson County, 2016

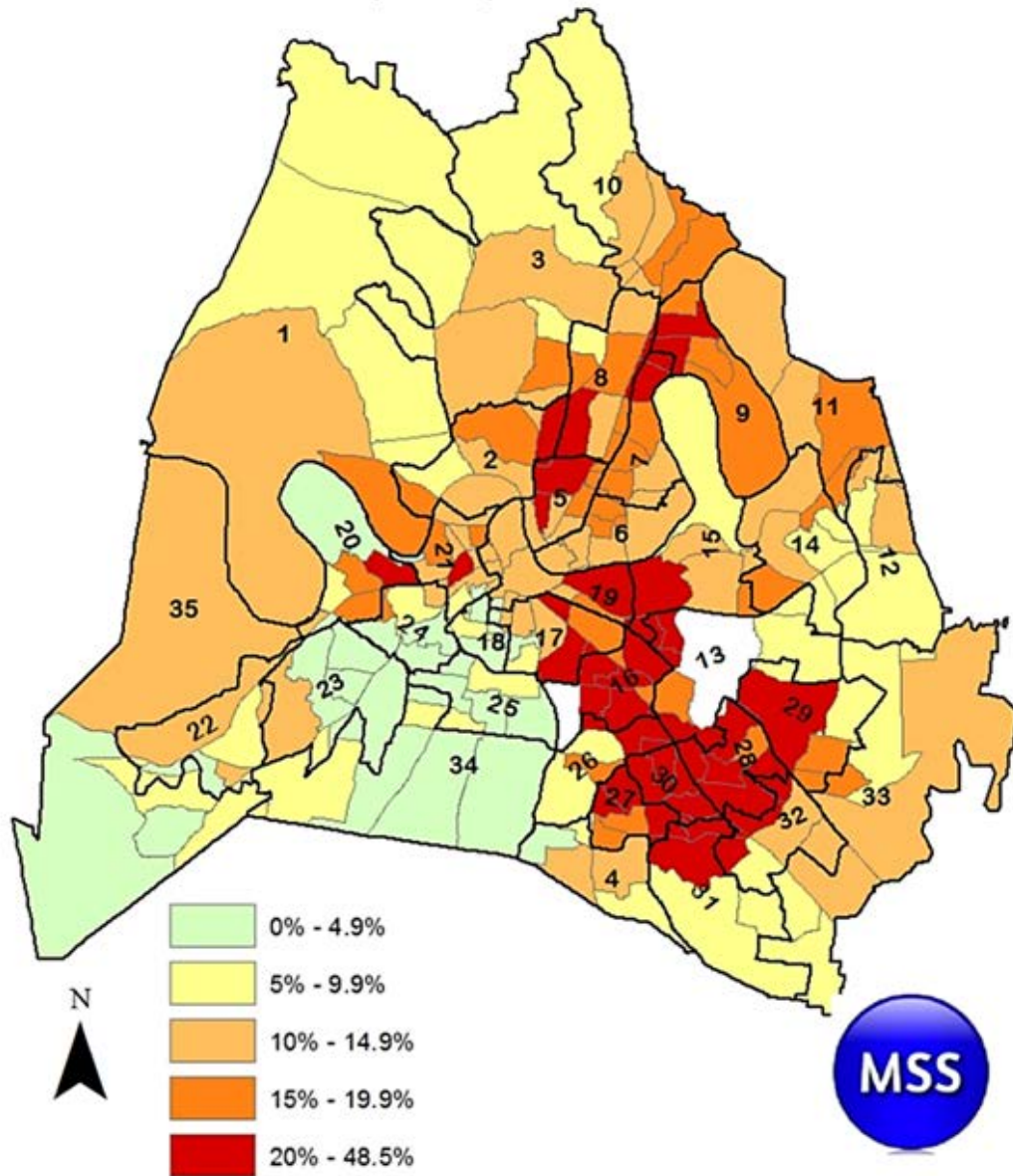


- ◆ Worked in county of residence
- Worked in state outside county of residence
- ▲ Worked outside state of residence

No Health Insurance Coverage Civilian Population by Census Tracts

Davidson County, 2012-2016

Data from the U.S. Census Bureau, Shapefiles from the Metropolitan Planning Department
Map from Metropolitan Social Services.



Unshaded areas include Cockrill Bend, Radnor Yards, the Nashville Airport and the Percy Priest Lake area.

Health

Insurance

Davidson County
2012-2016

Among Davidson County's civilian population, 93,741 do not have health coverage.

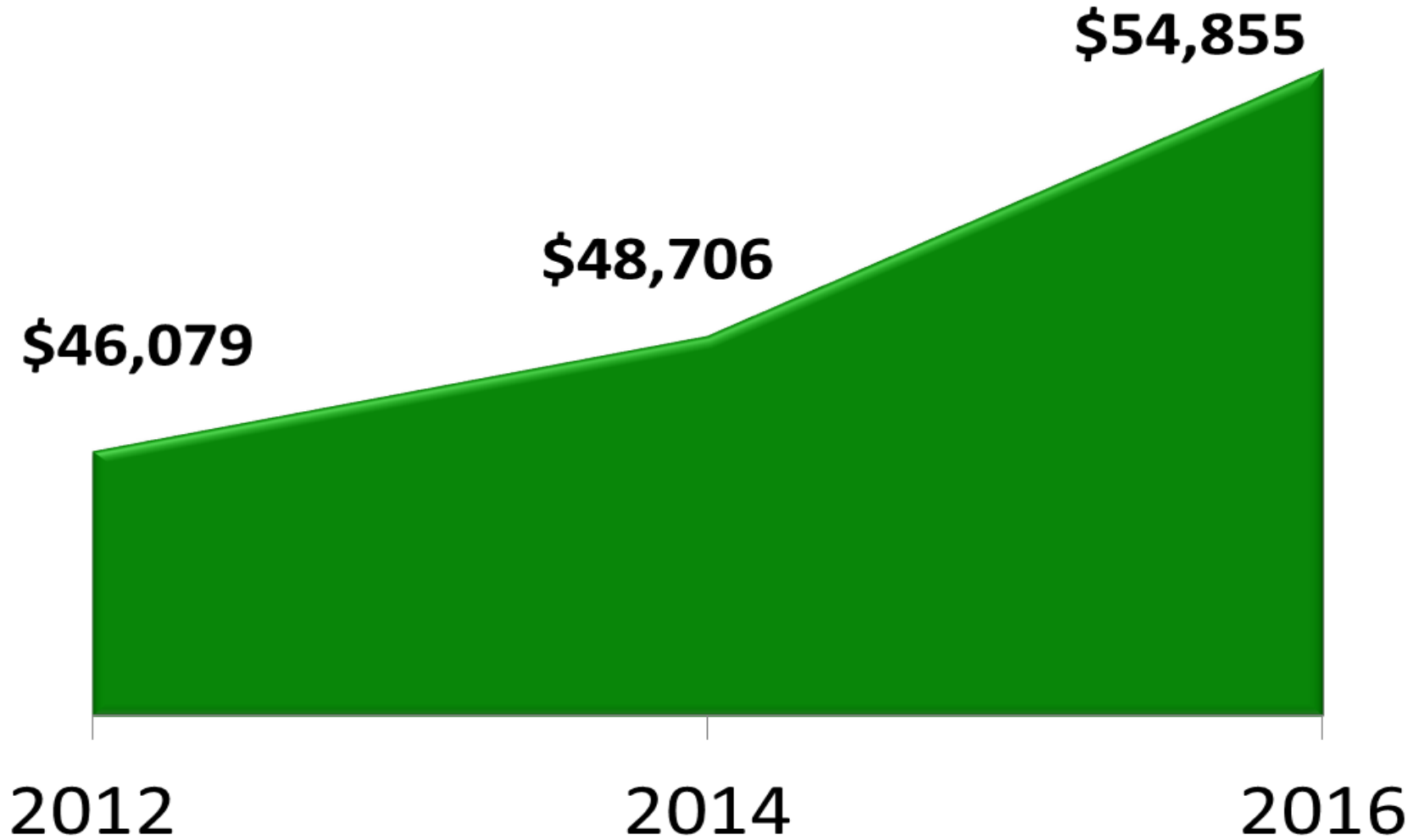
Areas in red have more than 20% of the population without health coverage.

Socioeconomic Profile



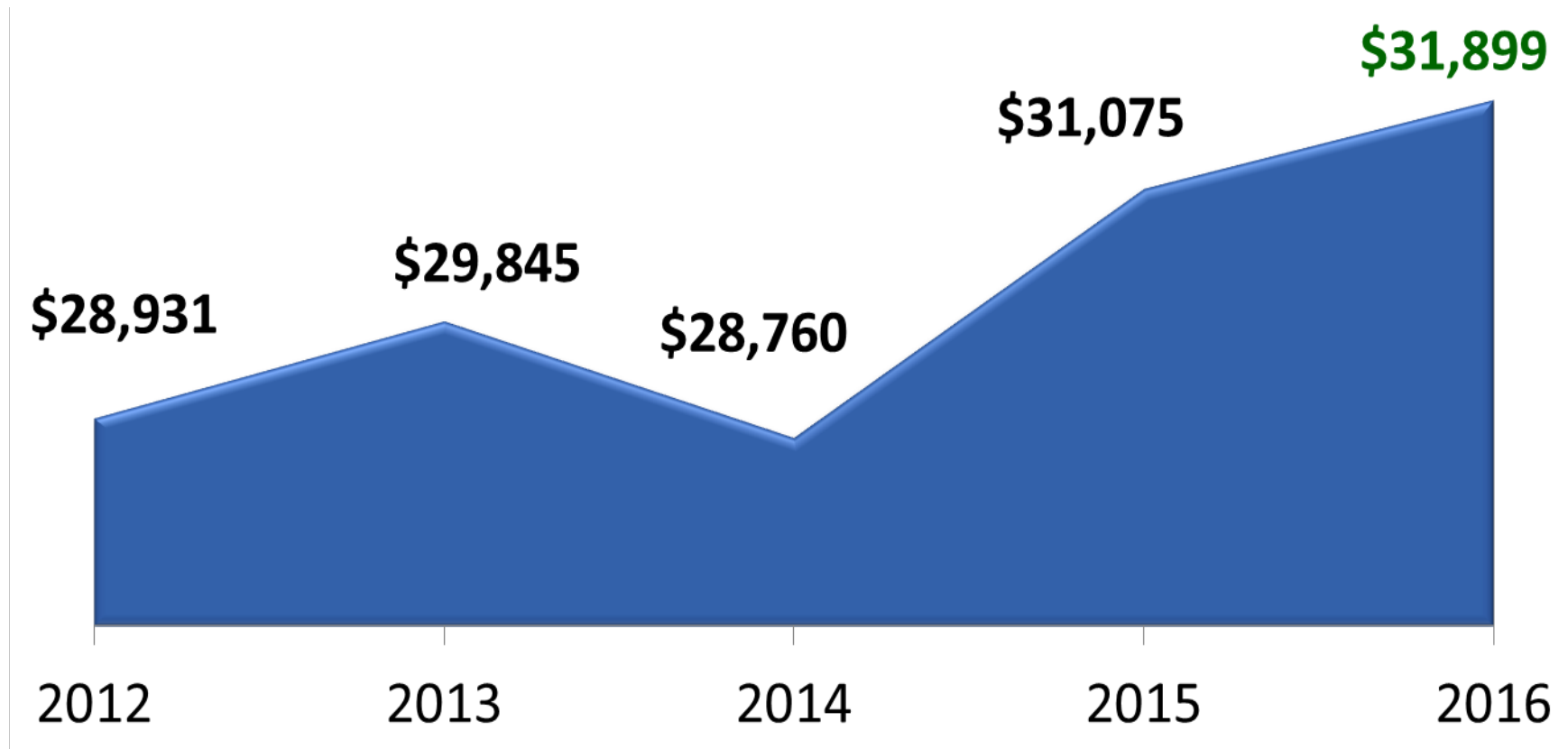
Median Household Income

Davidson County, 2016



Median Earnings for All Workers

Davidson County, 2016

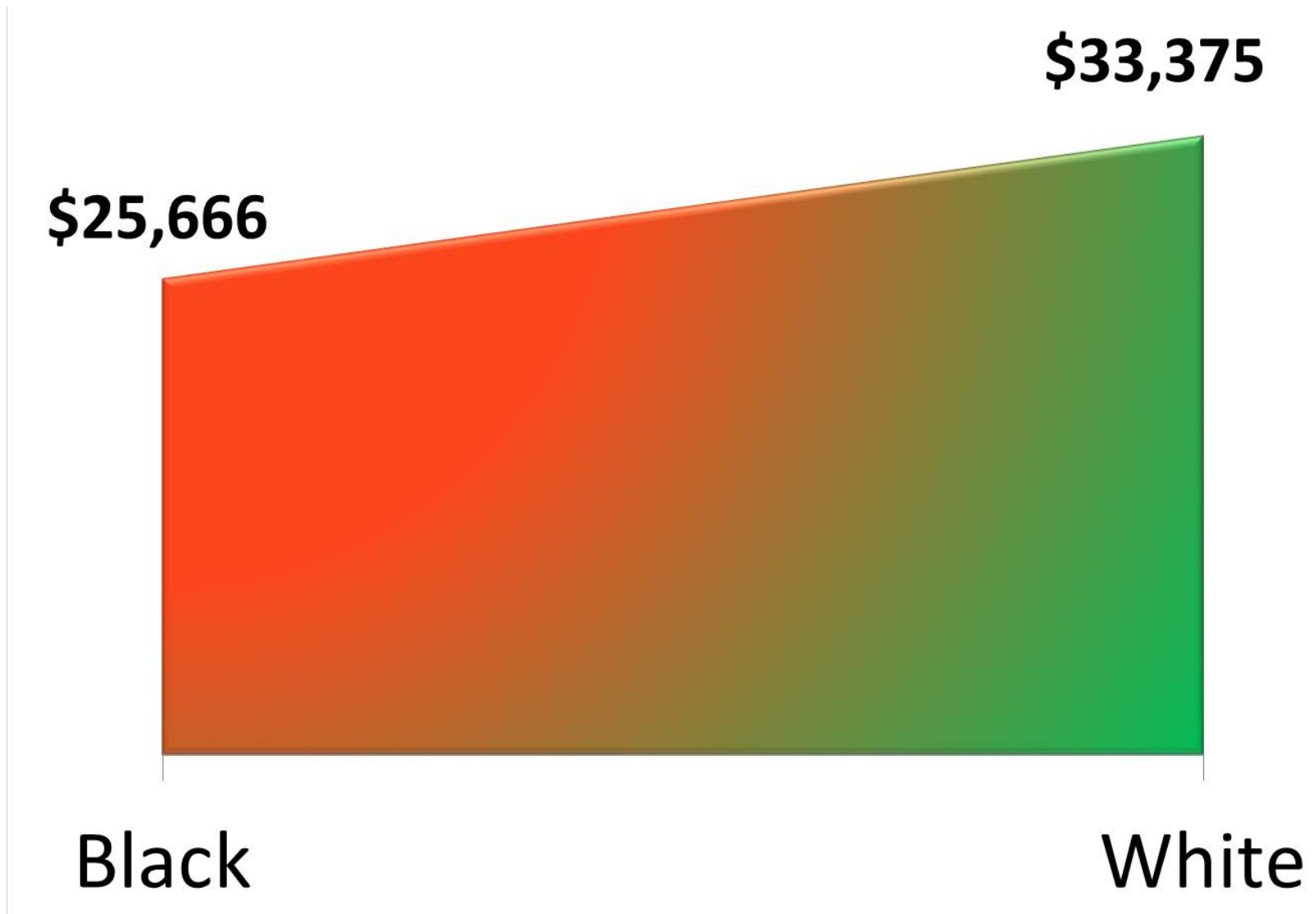


\$28,931 in 2012 dollars = \$30,995 in 2016 dollars



Median Worker Earnings by Race

Davidson County, 2012-2016

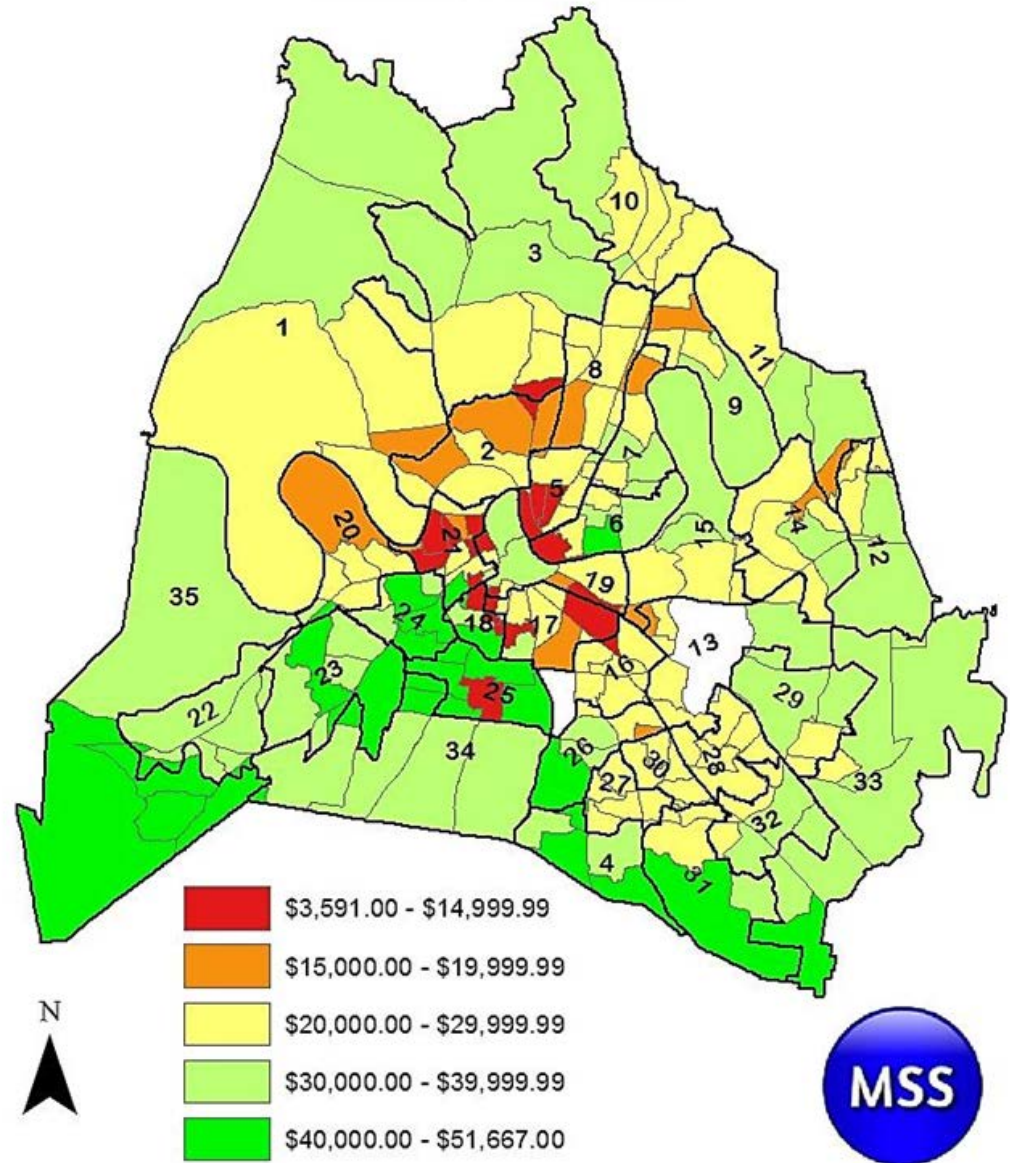


Median Worker Earnings by Census Tracts

RED – UNDER \$15,000

ORANGE \$15,000-\$20,000

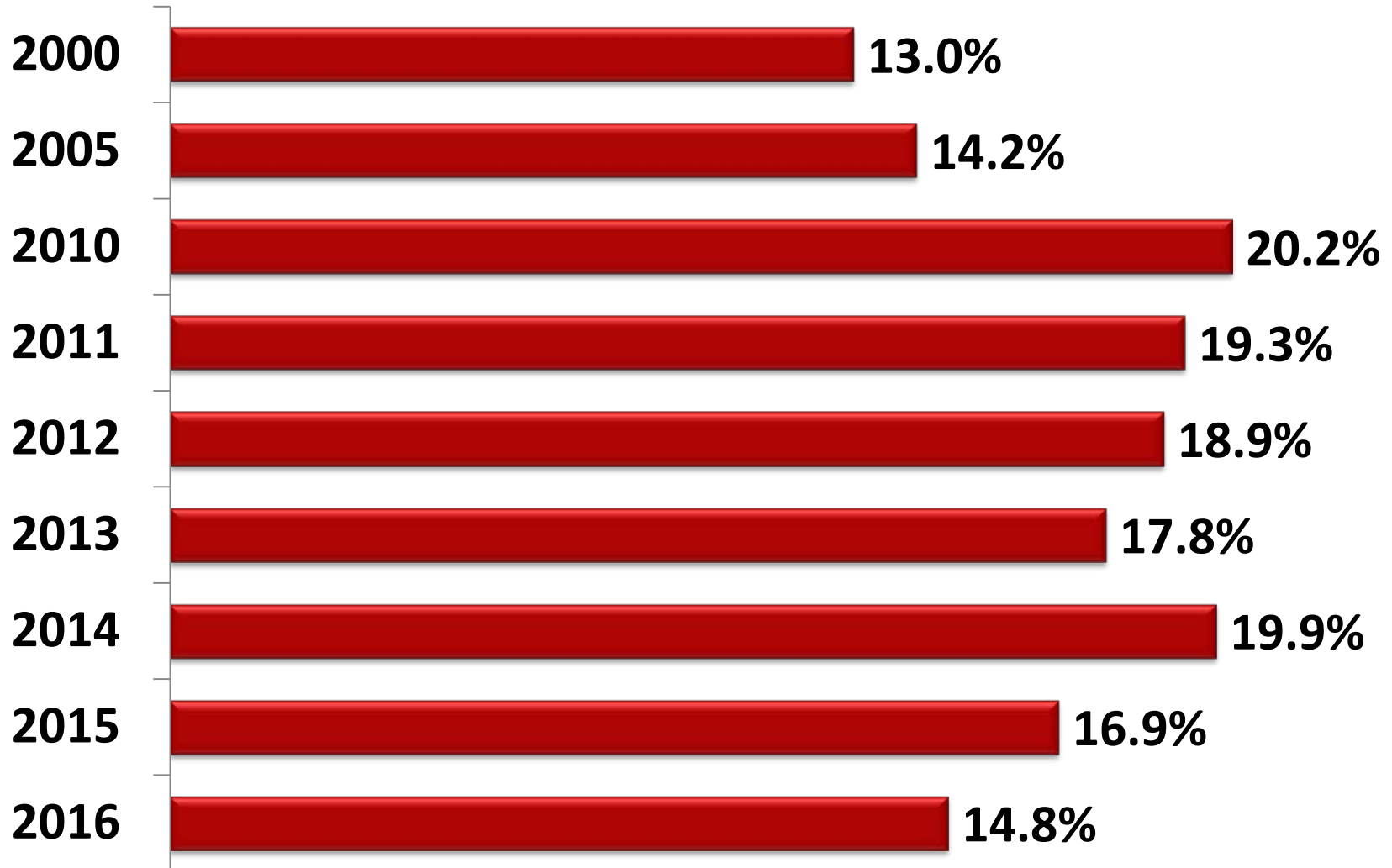
Median Worker Earnings by Census Tracts
Davidson County, 2012-2016
Data from the U.S. Census Bureau, Shapefiles from the Metropolitan Planning Department
Map from Metropolitan Social Services.





All People in Poverty

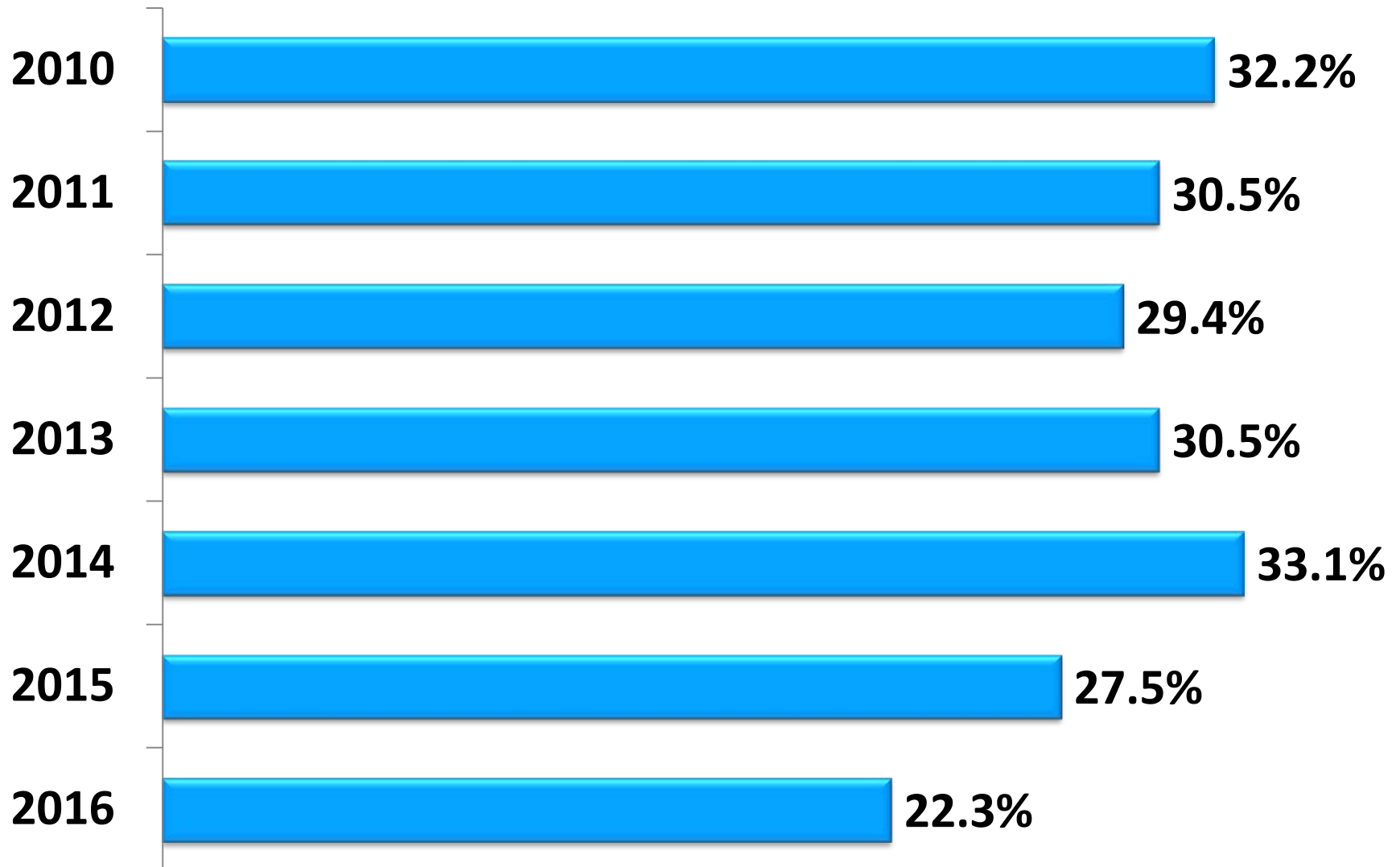
Davidson County, 2000, 2005, 2010-2016





Poverty Rate for Under Age 18

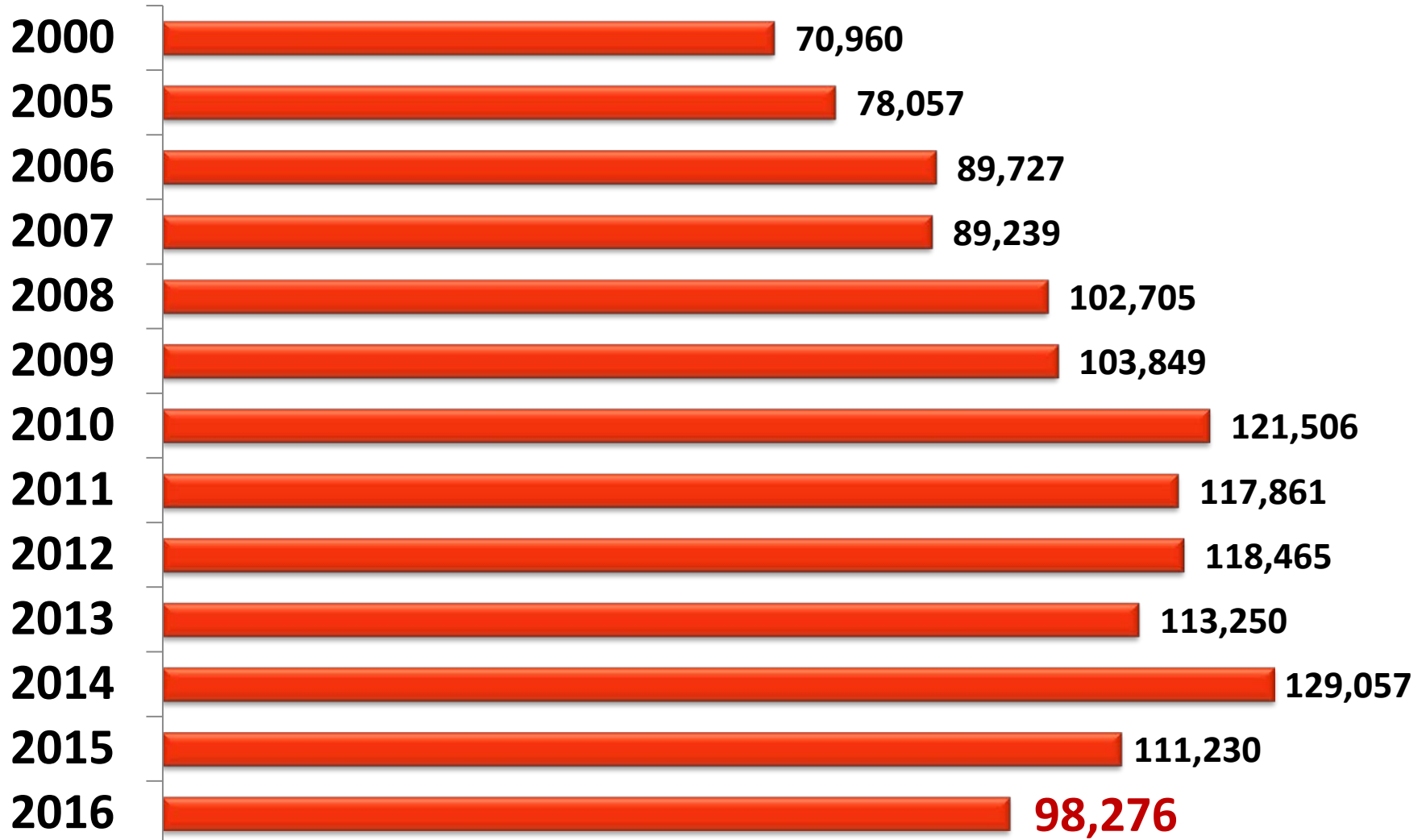
Davidson County, 2010-2016





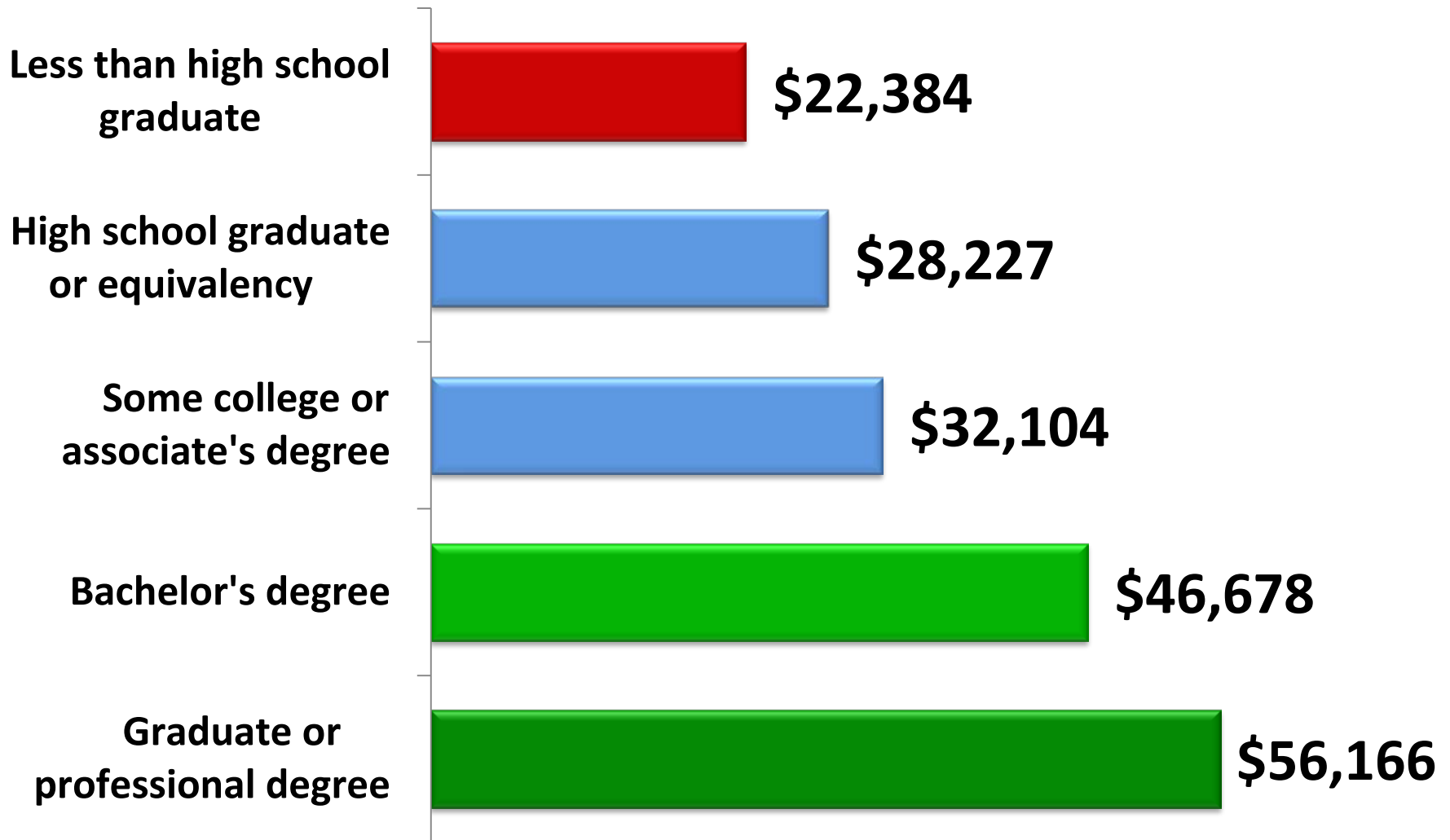
Number of People in Poverty

Davidson County, 2000, 2005-2016



Median Earnings by Educational Attainment

Davidson County, 2016



A “Typical” Nashvillian in 2016

- 82.7% lived in the same house
- 34.2 years old
- Lived in family of 3.07 people
- Has a high school education (87.6%)
- Work in private industry (83.2%)
- Work in county of residence (81.4%)
- Median worker earnings of \$31,899



Aging and Disability





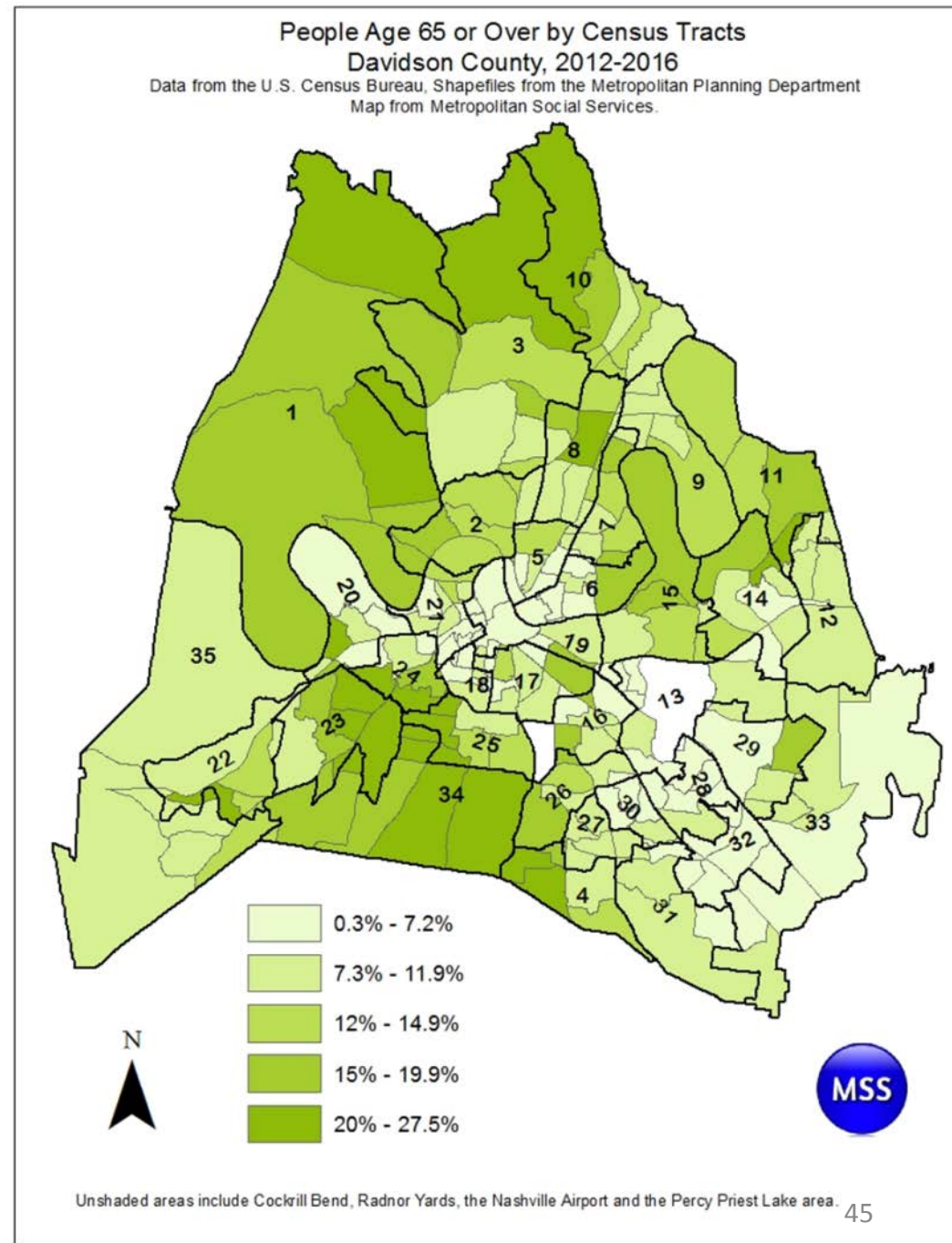
What are the greatest concerns for older Tennesseans?

- Health Concerns - Lack of Healthcare
- Financial Concerns - Enough money to meet living expenses
- Lack of Affordable/Reliable Transportation Options





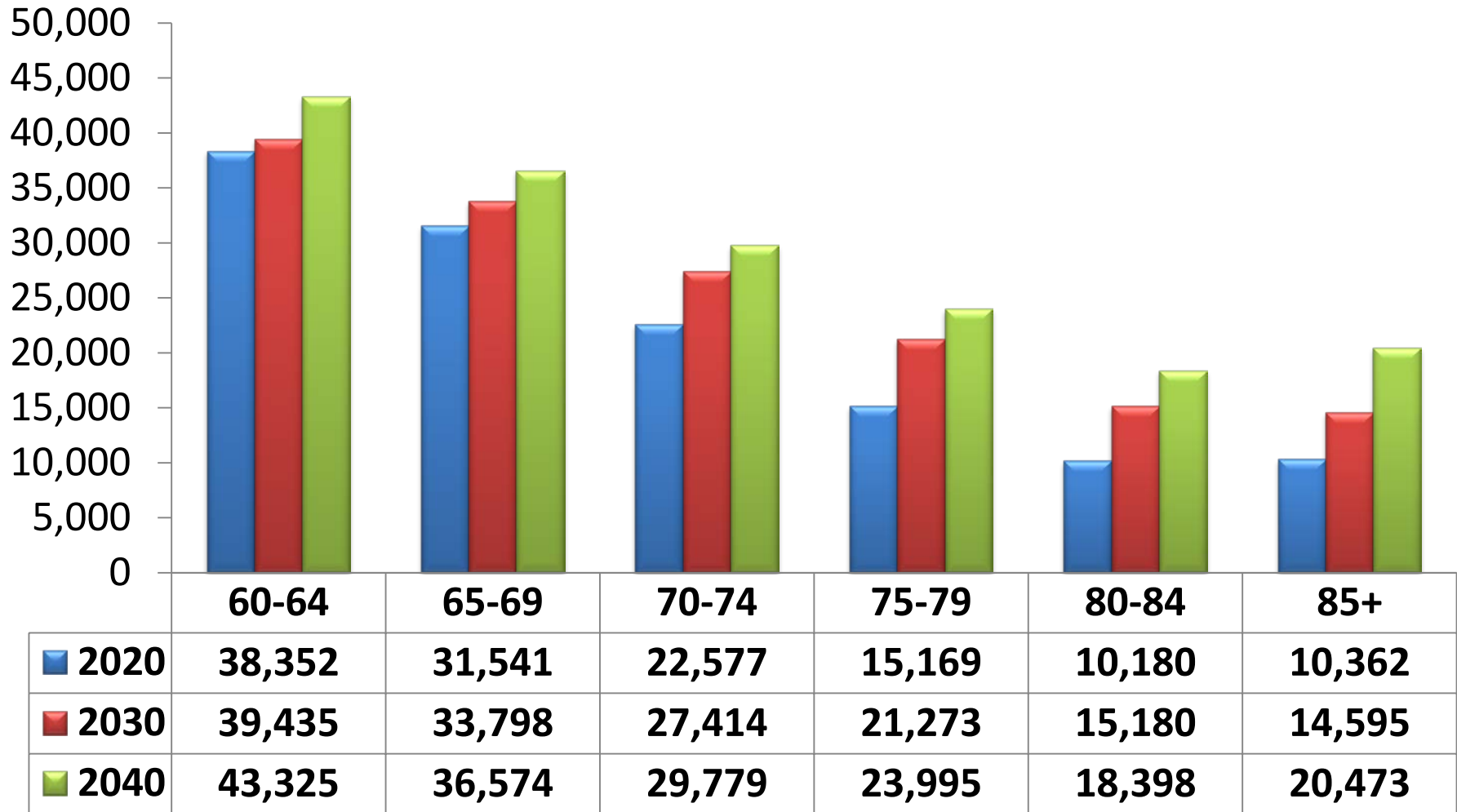
Where Persons Age 65 and over live in Davidson County





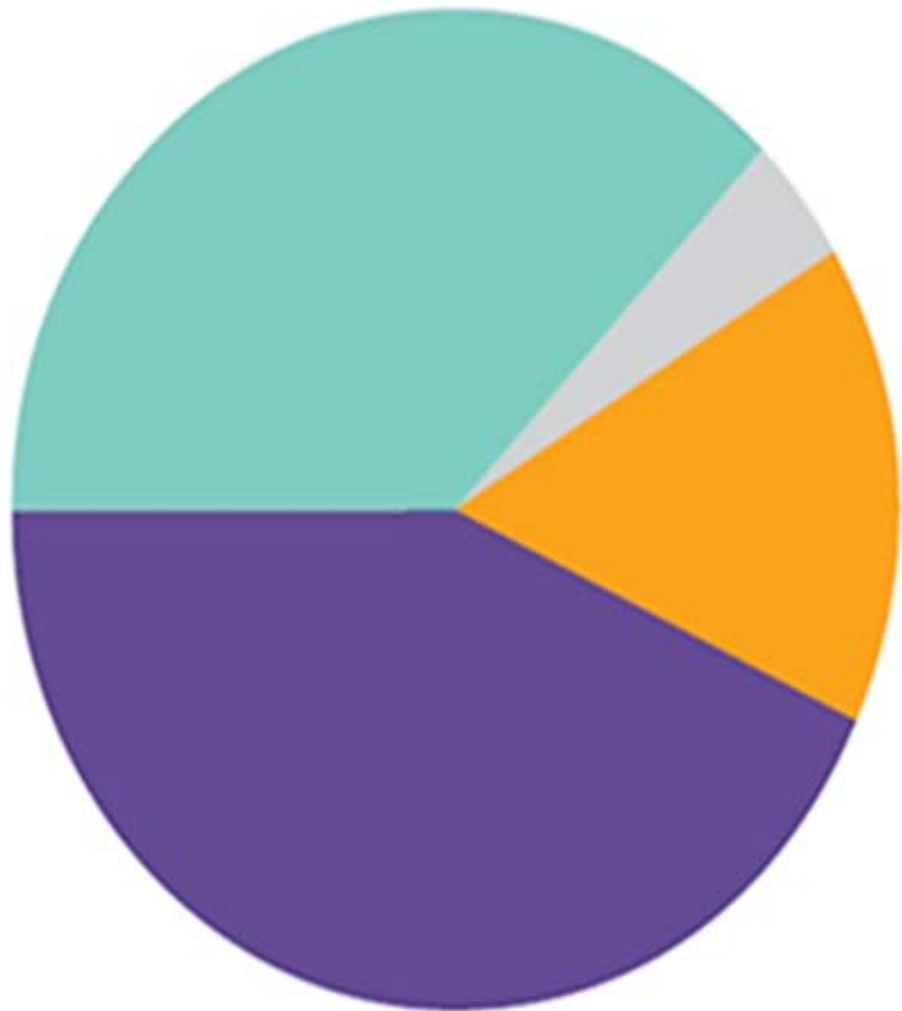
Population Projections by Age Groups

Davidson County, 2020, 2030, 2040



Ages of People with Dementia

In Tennessee, 1 in 8 people age 45 or older experience Subjective Cognitive Decline (SCD).



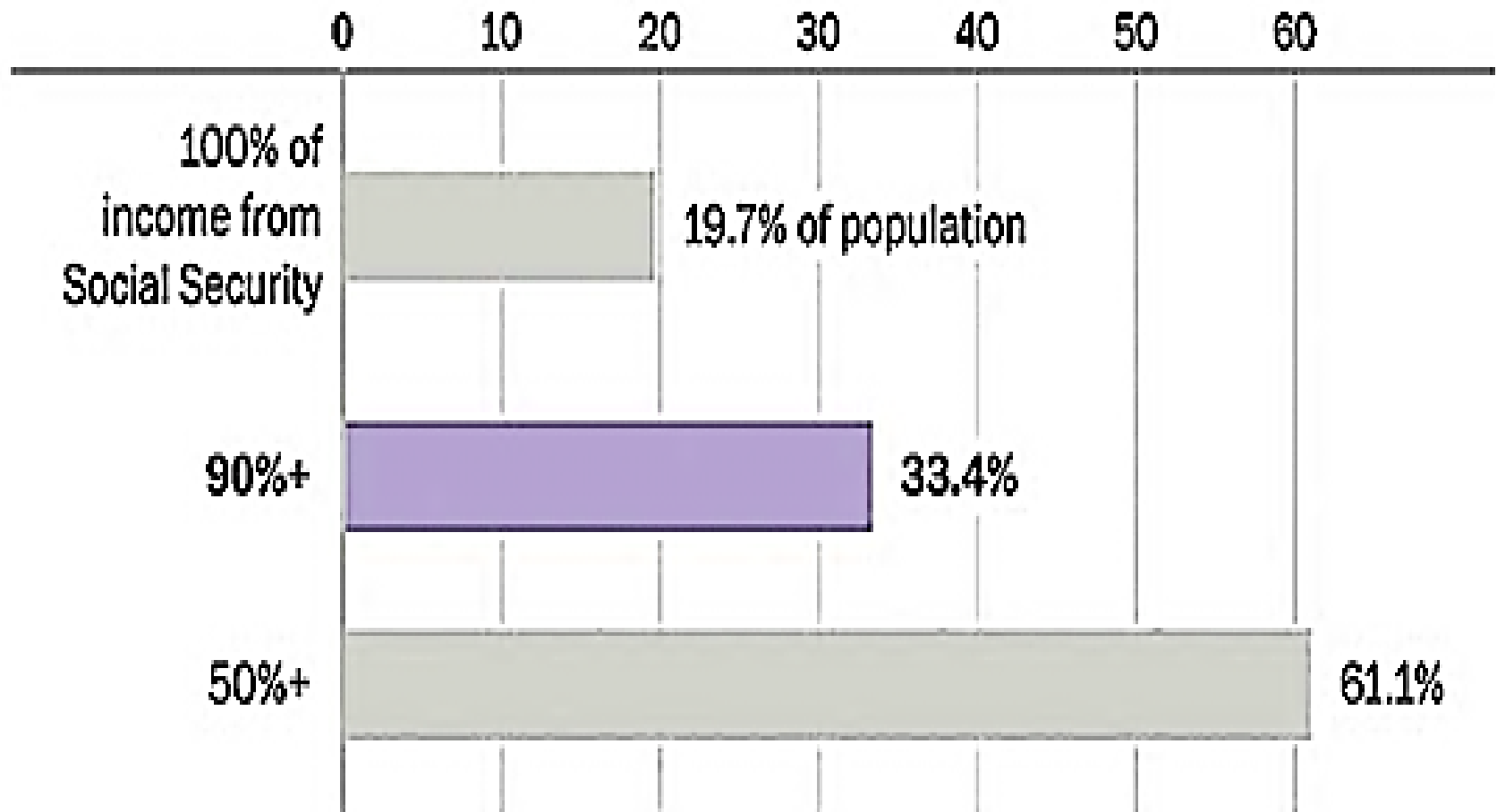
- 85+ years, 38%
- 75-84 years, 44%
- 65-74 years, 16%
- <65 years, 4%





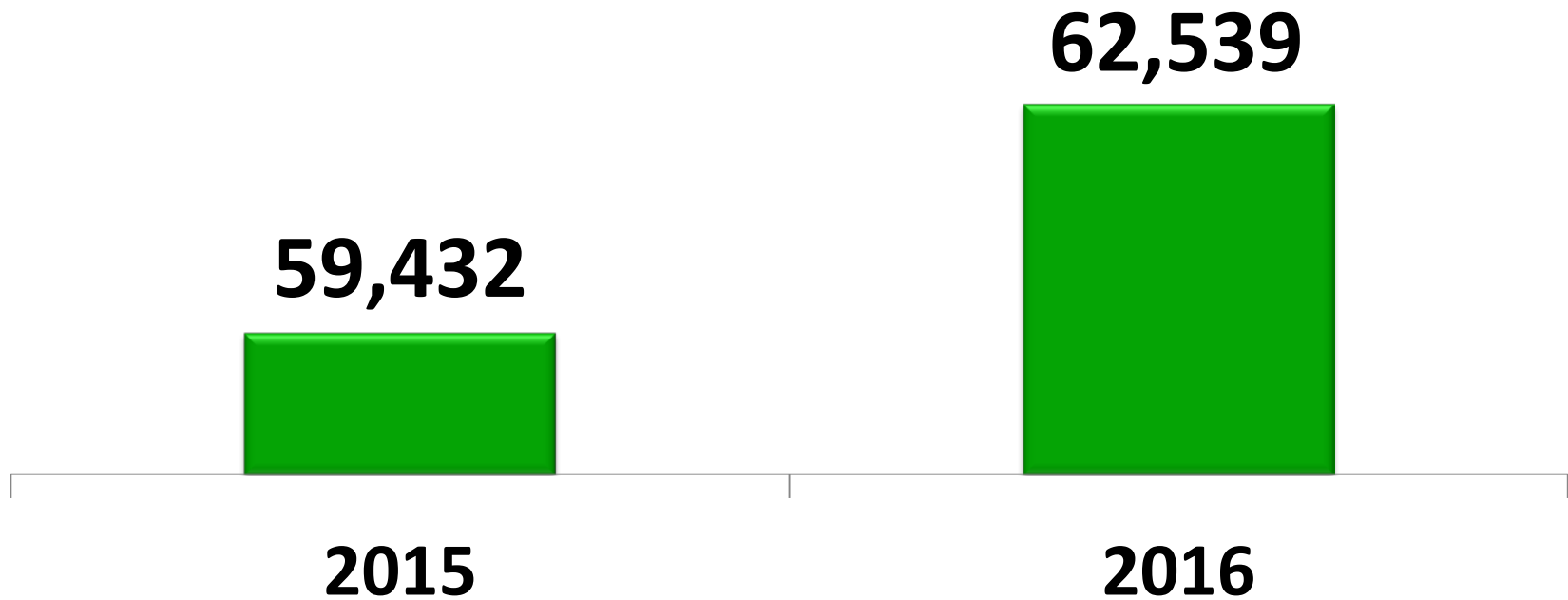
Percent of Population who Rely ONLY on Social Security

Almost 1/5 of individuals rely on Social Security for 100% of their income.





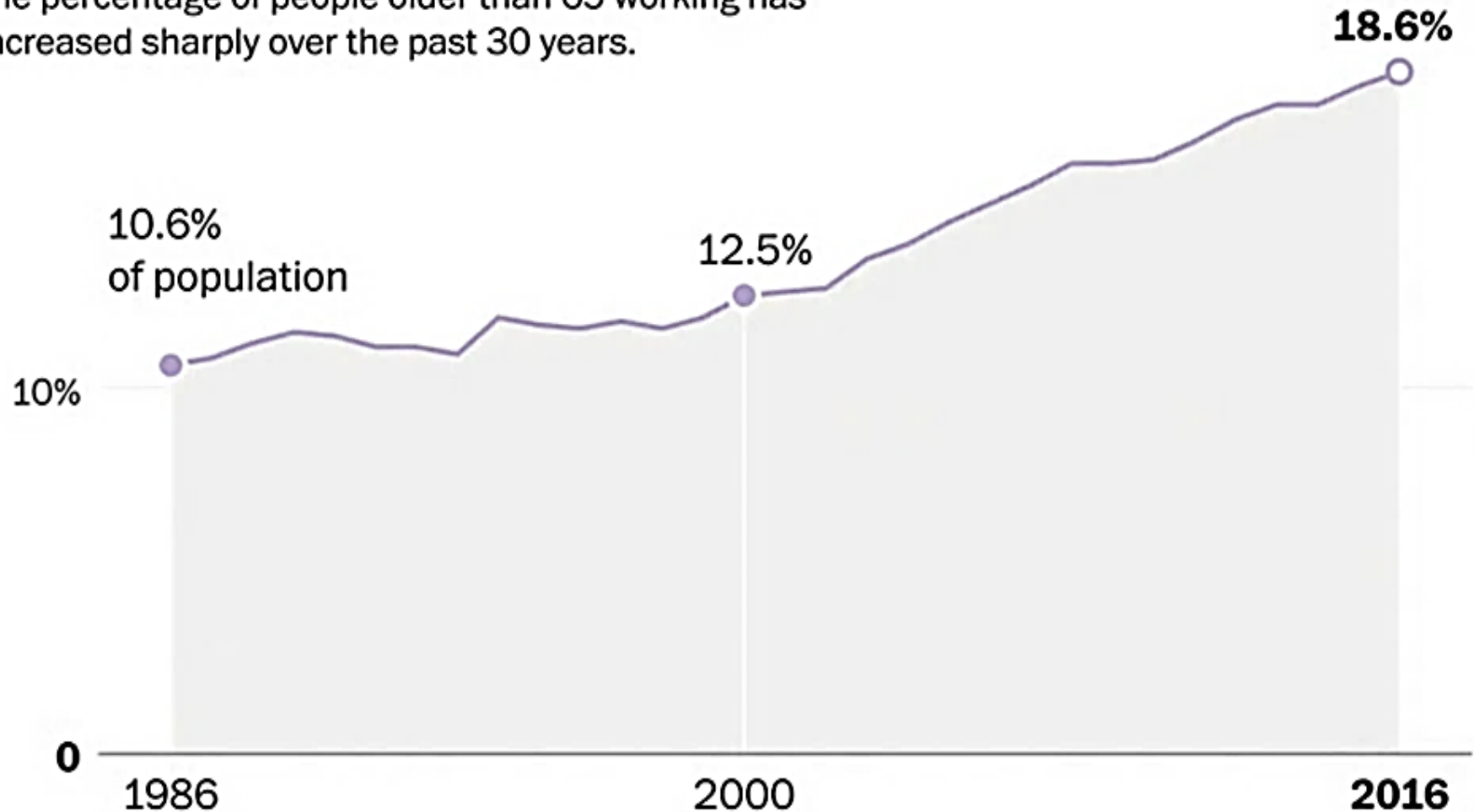
Households in Davidson County Receiving Social Security



The mean (average) Social Security income was **\$18,611** for Davidson County in 2016.

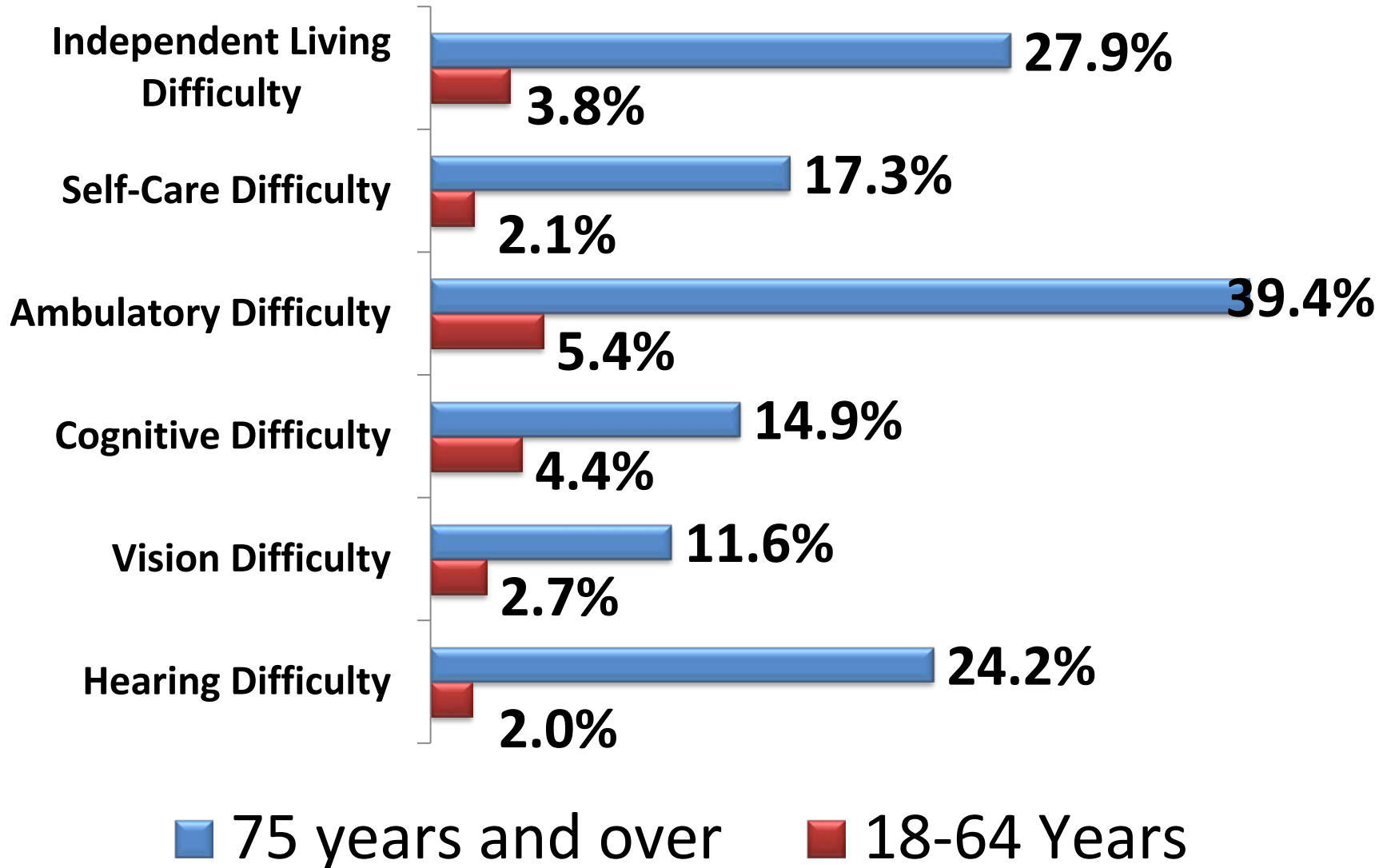
Postponing Retirement for Persons Age 65 and Over

The percentage of people older than 65 working has increased sharply over the past 30 years.

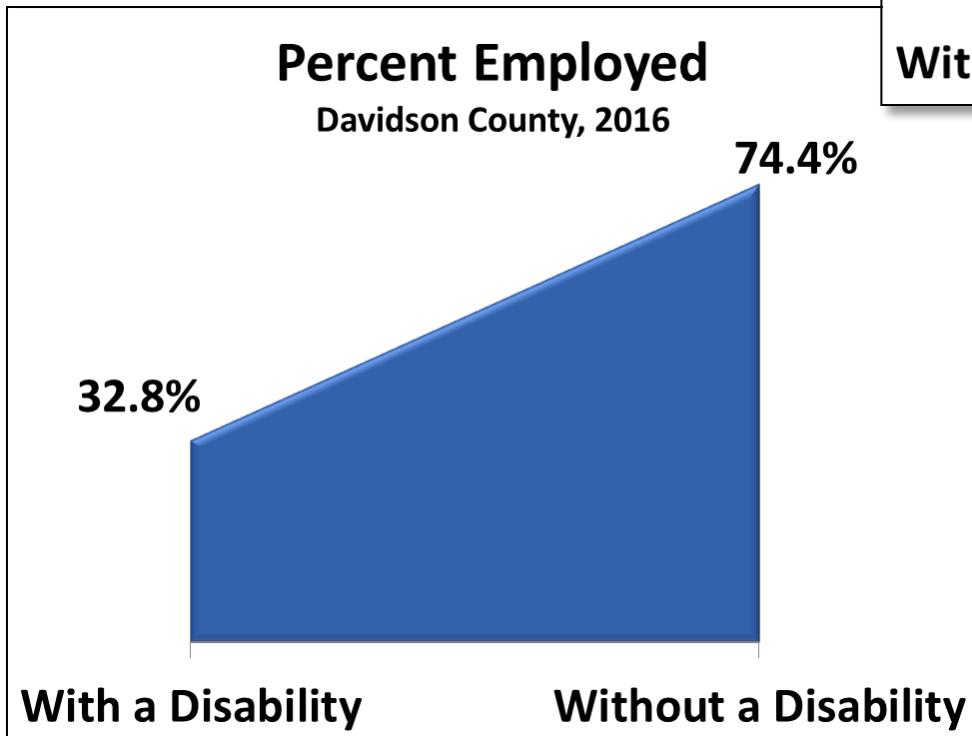
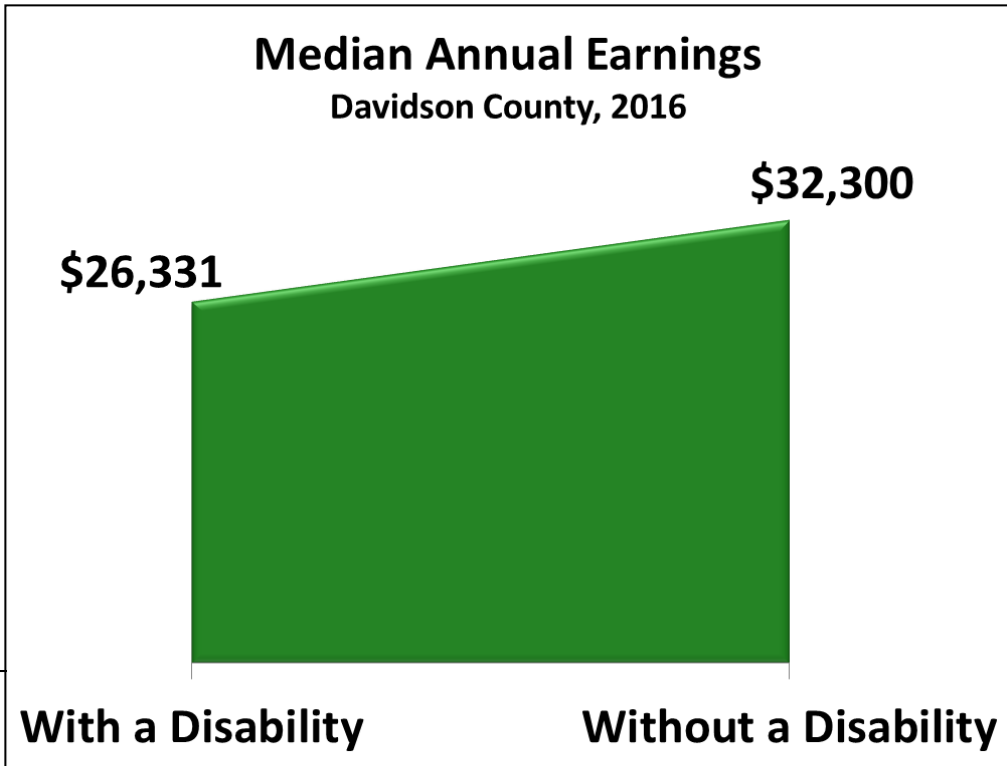


Persons with a Disability by Age

Davidson County, 2016



Median Annual Earnings and Employment Rate by Disability Status



Falls



- Falls result in 300,000 hospitalizations for hip fractures – Emergency rooms is usually the primary point of entry
- Falling one time doubles your chance for falling again
- Fall injuries are estimated to result in medical costs of \$31 billion annually



1 IN 3 OLDER ADULTS
over the age of 65 fall
each year

AMONG OLDER ADULTS, falls are the number one cause of fractures, hospital admissions, loss of independence and injury-related deaths.



Aging and Disability

Plan for Retirement

Stay Active

Find Your Purpose/Passion



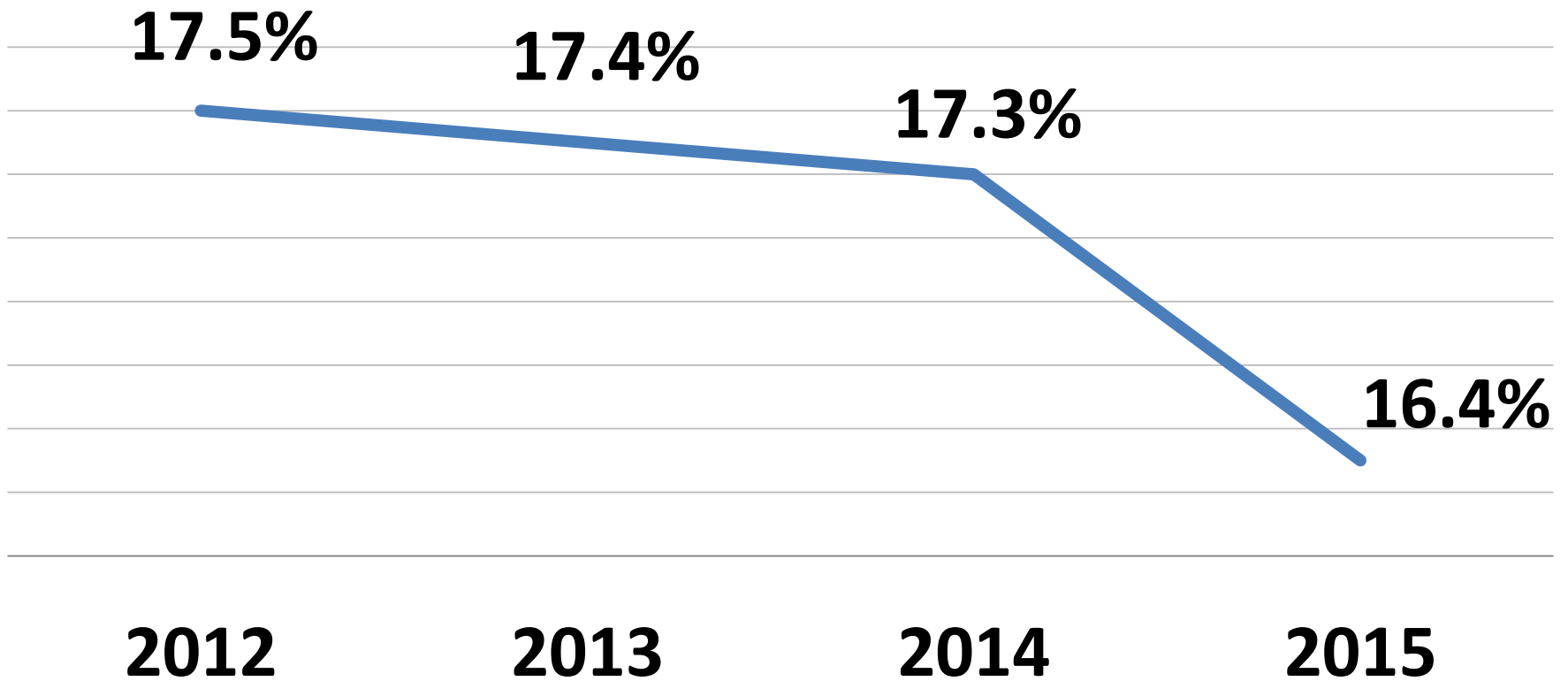
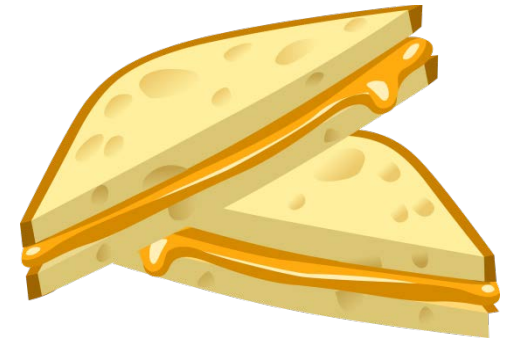


Food and Nutrition

Food insecurity is the limited or uncertain availability of nutritionally adequate and safe foods or limited or uncertain ability to acquire acceptable foods in socially acceptable ways.

Food Insecurity Rate

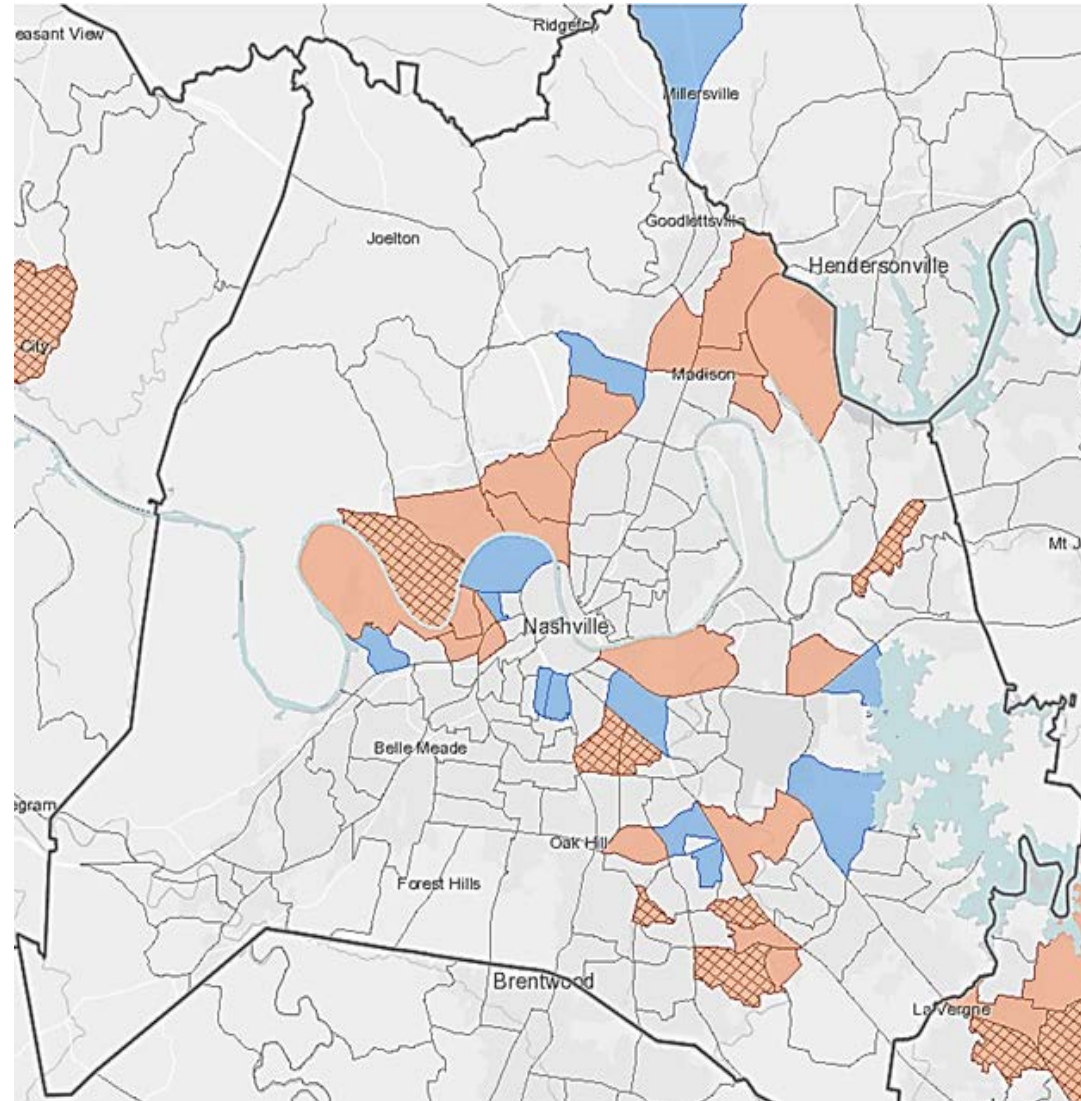
Davidson County, 2012-2015



Food Deserts in Davidson County

Food Desert Census Tracts, Change, 1 Mi. / 10 Mi.
FARA 2010-2015

-  Food Desert - Added in 2015
-  Food Desert - No Change
-  Not a Food Desert - Removed in 2015
-  Not a Food Desert



Who is likely to be hungry?

Adults age 65 and over

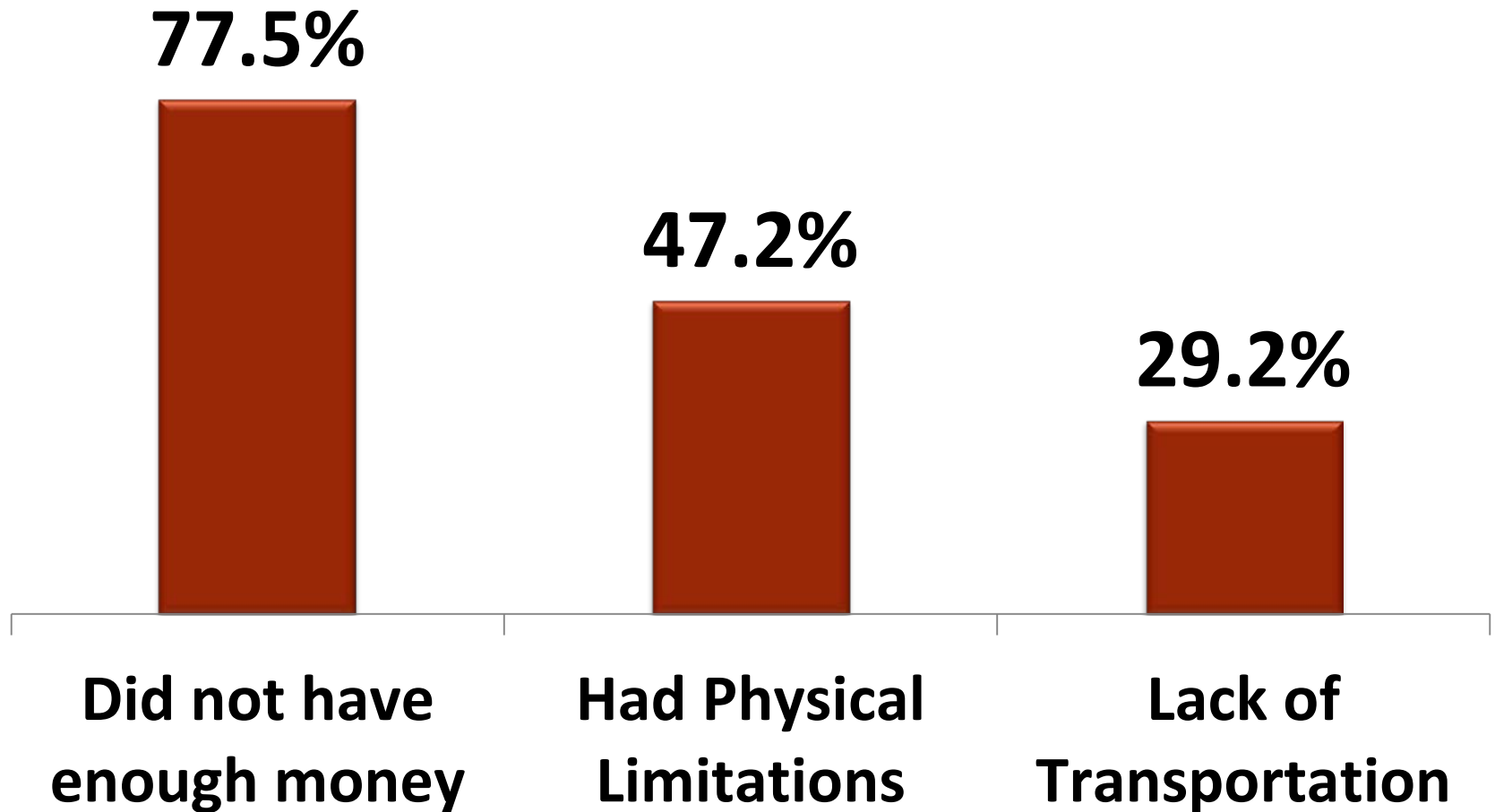


**Children and youth -
age 18 and under**





Causes of **Food Insecurity** Among Older Adults in Tennessee





Food Insecurity Among Young People

- **Food insecurity in children has been linked with delayed development, poorer attachment, and learning difficulties in the first two years of life.**
- **Food insecurity among young children is associated with poorer physical quality of life, which may prevent them from fully engaging in daily activities such as school and social interactions with peers.**
- **Food-insecure children may be at a greater risk of truancy and school tardiness.**
- **When they are in school, children who are food insecure may experience increases in an array of behavior problems including: fighting, hyperactivities, aggression, anxiety, mood swings and bullying.**

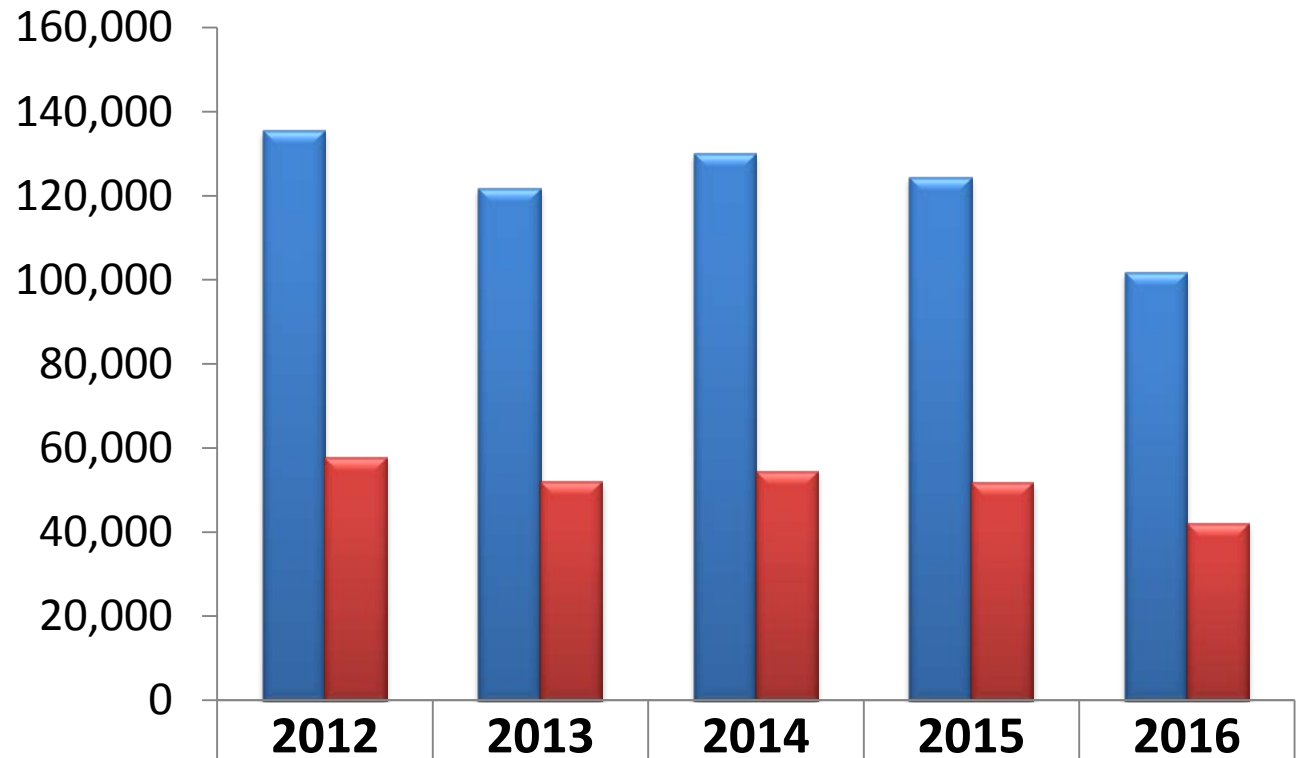


Need to increase the number of meals served during the summer months

- **Metro Action Commission served 280,000 meals during the Summer of 2017, an increase over the previous year.**
- **In comparison during the 2016-2017 school year 8.4 million meals were served, according to Metropolitan Nashville Public Schools .**

Emergency Food Distribution

Second Harvest Food Bank of Middle Tennessee

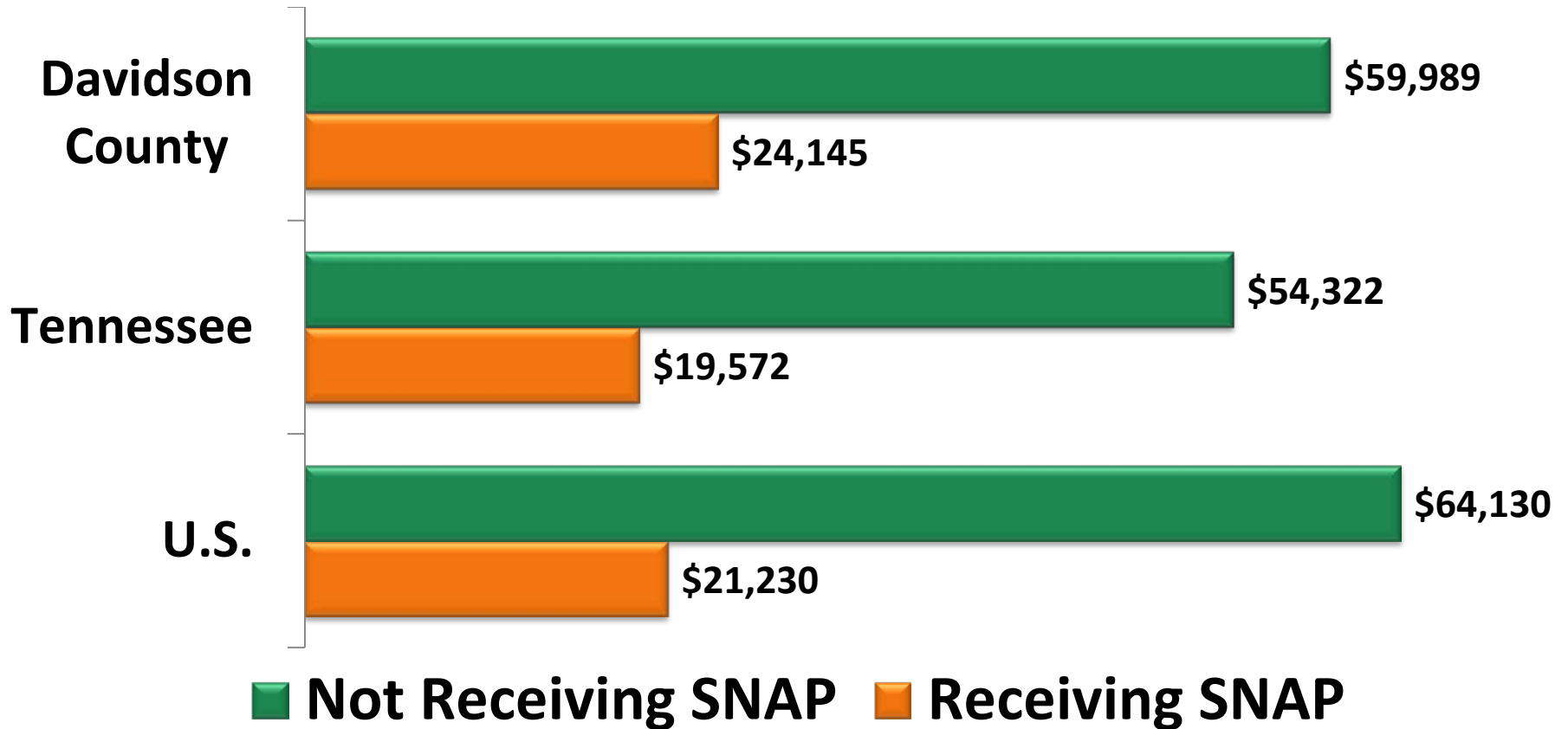


■ Individuals Served	135,510	121,816	130,049	124,519	101,729
■ Emergency Food Boxes	57,878	52,013	54,477	51,760	41,960



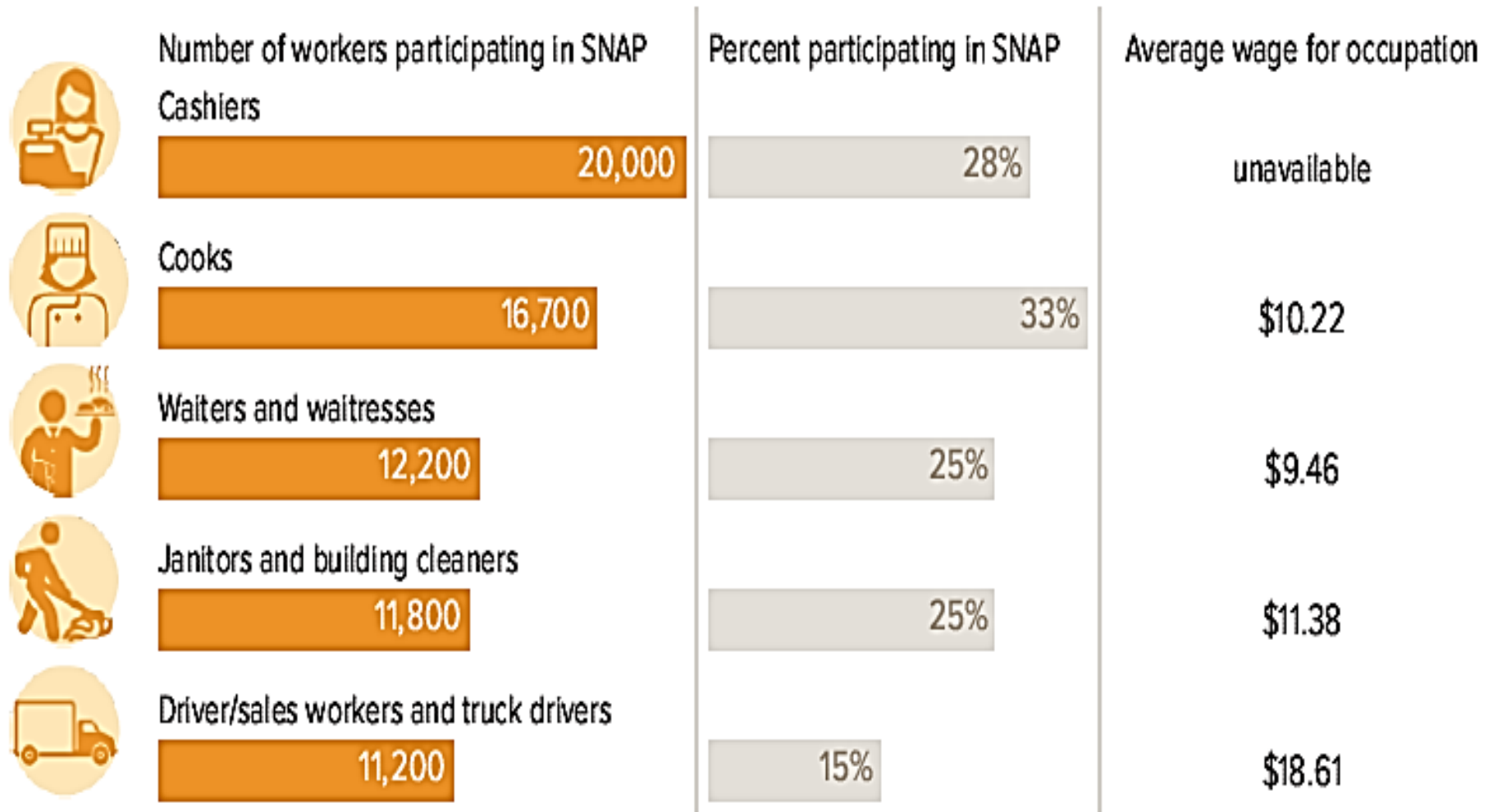
Supplemental Nutrition Assistance Program

SNAP recipients have lower median household income than non-SNAP recipients.



SNAP and Service Industry Workers

Top Occupations Among Tennesseans Participating in SNAP by Number of Workers







Metro **Public Health Dept**

Nashville / Davidson County

Protecting, Improving, and Sustaining Health



NASHVILLE'S COMMUNITY HEALTH ASSESSMENT

Metro Social Services

Annual Community Needs Assessment (CNE) Release

Wednesday – February 21st, 2017

Health Section

Metro Public Health Department

Dr. Raquel Qualls-Hampton

Chief Epidemiologist & Division Director



Metro Public Health Dept

Nashville / Davidson County

Protecting, Improving, and Sustaining Health

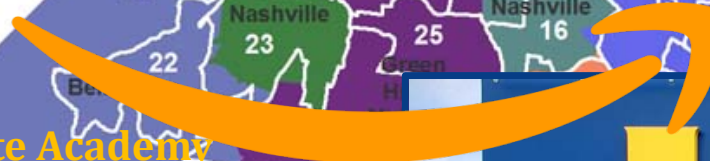
100 RESILIENT CITIES

CENTENNIAL CHALLENGE

Inc. 5000 names
Nashville's
fastest-growing
private companies

Top grown companies

amazon



Valor Collegiate Academy



celebrate Nashville Cultural Festival



NASHVILLE....



TIME FOR A CHECK-UP!



HEALTH CHAPTER

NASHVILLE.....



TIME FOR A CHECK-UP!

COMMUNITY HEALTH ASSESSMENT

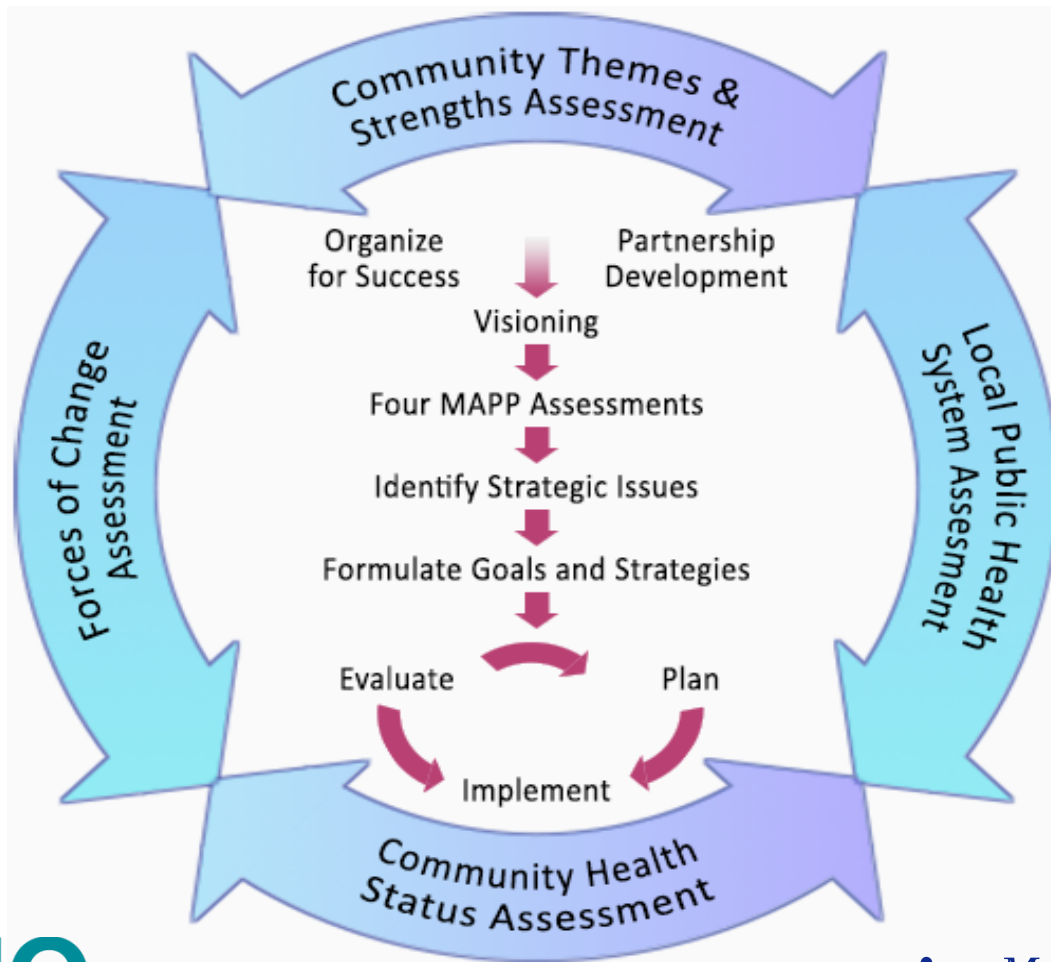


Metro Public Health Dept
Nashville/Davidson County

Protecting, Improving, and Sustaining Health



Mobilizing for Action through Planning & Partnering (MAPP)



Priority Health Areas 2015- 2019

**Advance
Health
Equity**

**Support
Mental &
Emotional
Health**

**Maximize
Built &
Natural
Environments**



Metro Public Health Dept
Nashville / Davidson County

Protecting, Improving, and Sustaining Health



Priority Health Issues 2015- 2019

Advance
Health
Equity

Support
Mental &
Emotional
Health

Maximize
Built &
Natural
Environments



EVALUATE



Metro Public Health Dept
Nashville / Davidson County
Protecting, Improving, and Sustaining Health



Priority Health Issues

2020-2024

?

?

?



Metro Public Health Dept
Nashville / Davidson County

Protecting, Improving, and Sustaining Health



Priority Health Issues 2020-2024

Stay tuned
for
more details!



www.healthynashville.org



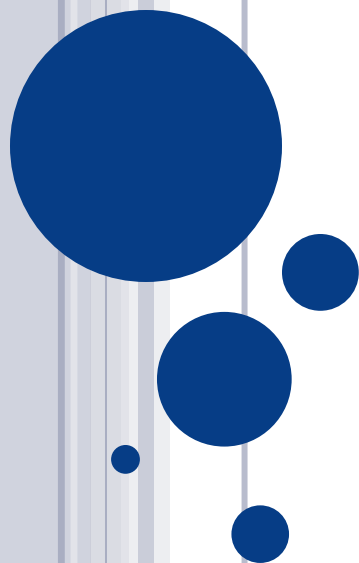
Metro Public Health Dept
Nashville/Davidson County
Protecting, Improving, and Sustaining Health





COMMUNITY HEALTH ASSESSMENT

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Community Development & Planning
Tracy.Buck@nashville.gov
(615) 340-5321



HEALTH DATA

www.HealthyNashville.ORG

OR

Dr. Raquel Quall-Hampton, Director
Epidemiology
Raquel.Qualls-Hampton@nashville.gov
(615) 340-8623

HEALTH SECTION CONTRIBUTING AUTHORS

- Tracy Buck, MS, RDN
- William Paul, MD, MPH
- Max Baker
- Abraham Mukolo, PhD
- Nick J. Lindeman





“Do the best you can until you know better. Then when you know better, do better.”

- Maya Angelou

Thank you!

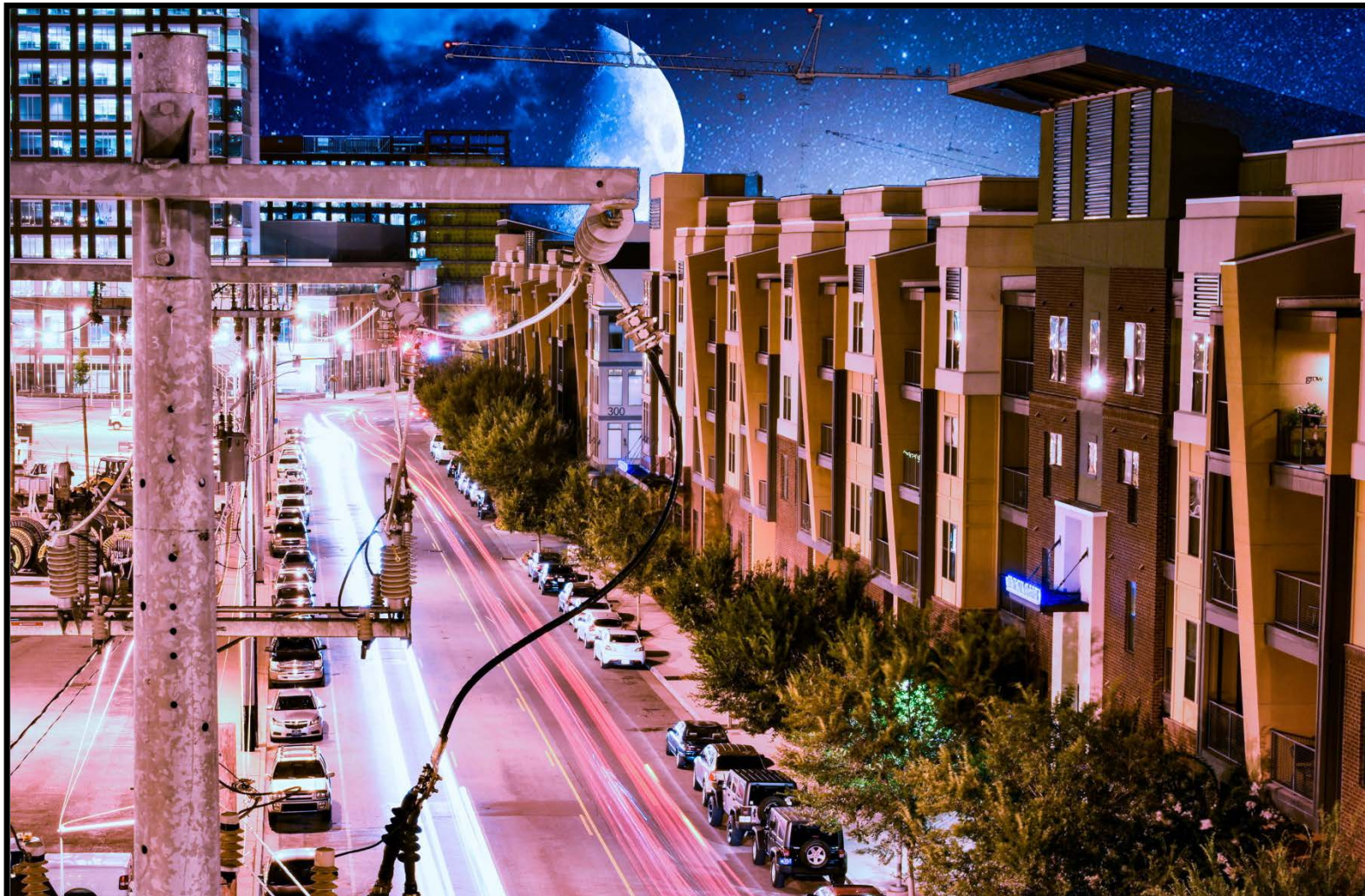


Metro Public Health Dept
Nashville/Davidson County

Protecting, Improving, and Sustaining Health



Housing





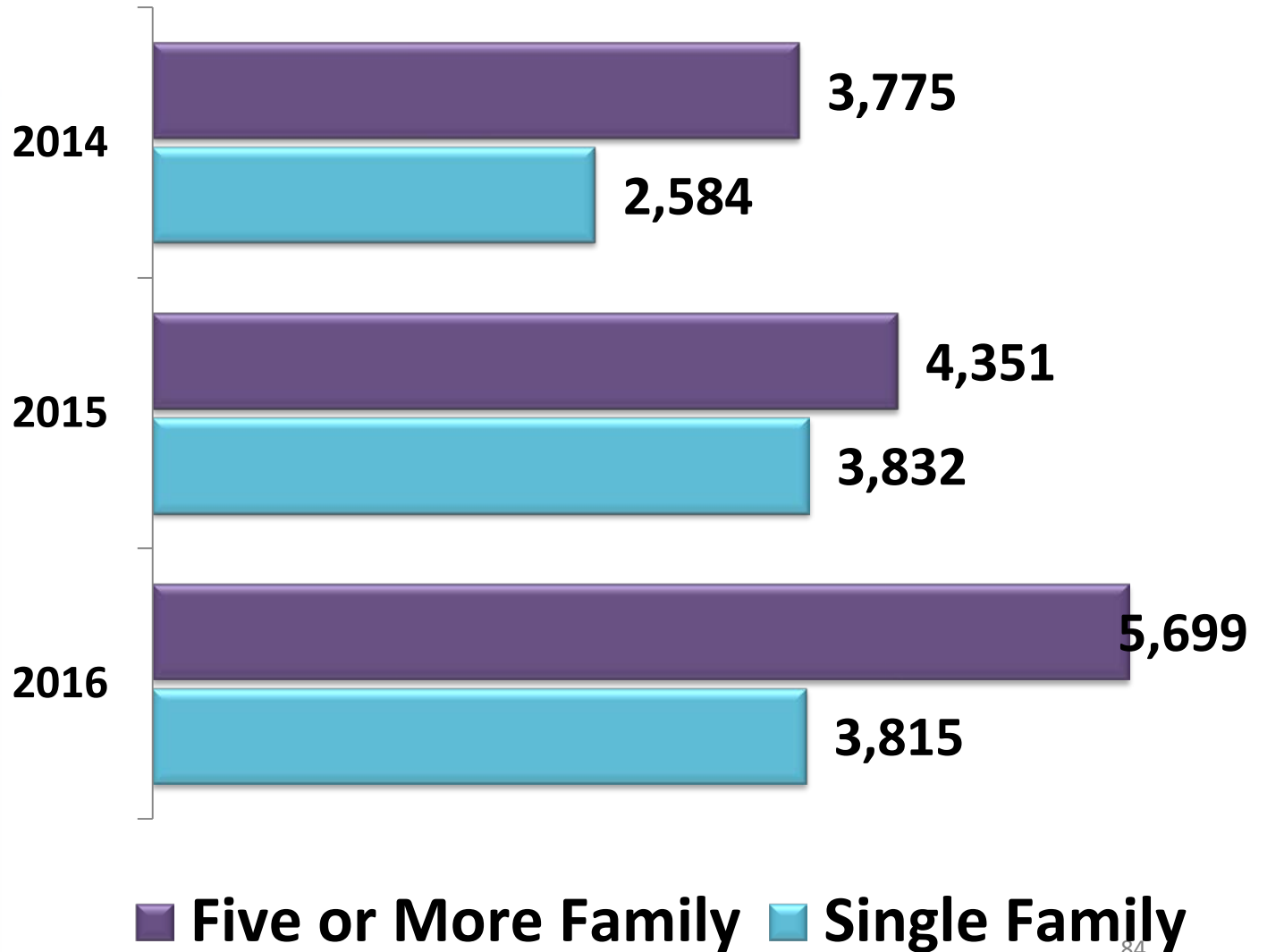
Good News? Nashville Dropped from 6th to 9th in Top 10 Hottest U.S. Markets

9 Nashville



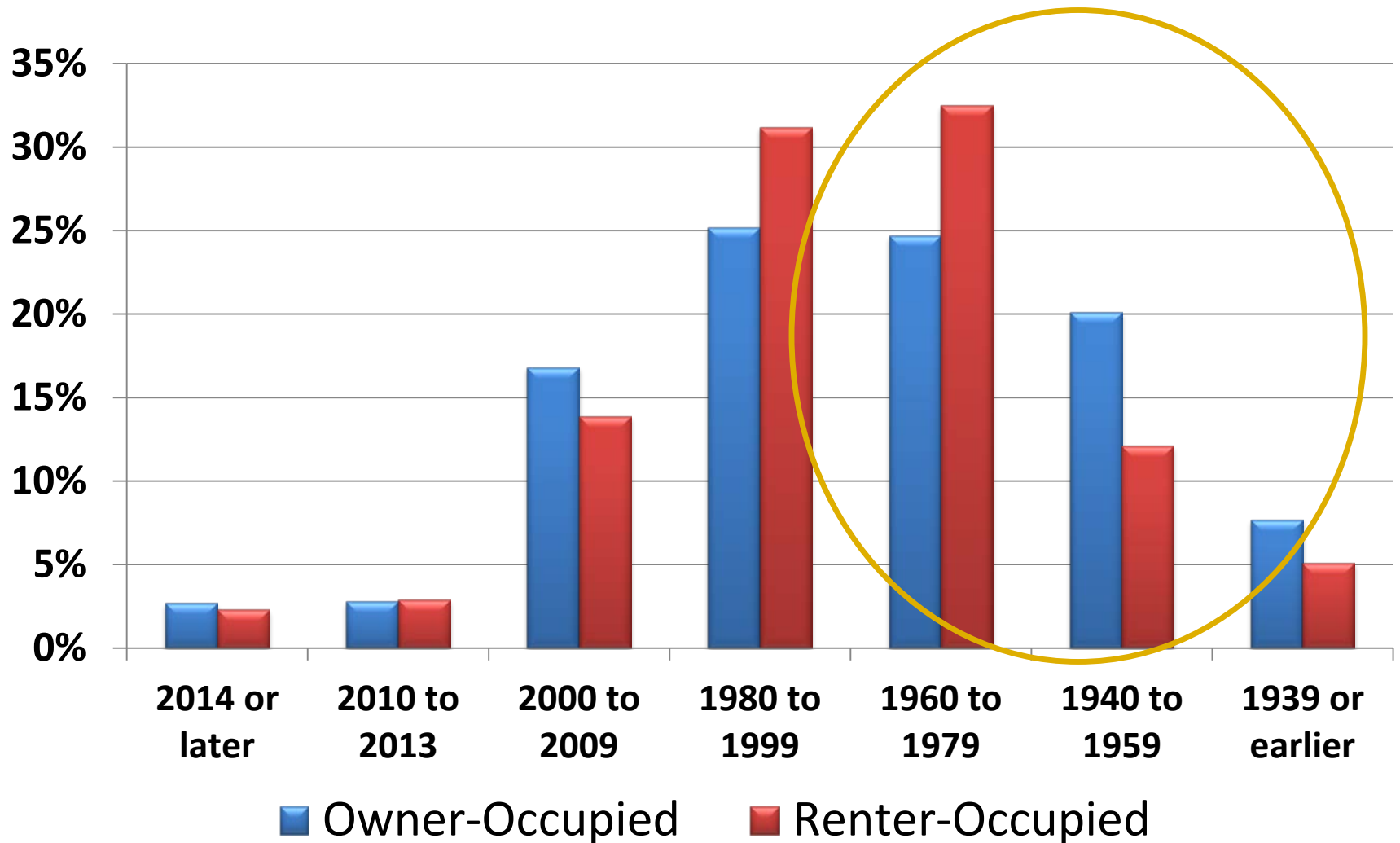


Number Of Units For Which Building Permits Were Issued



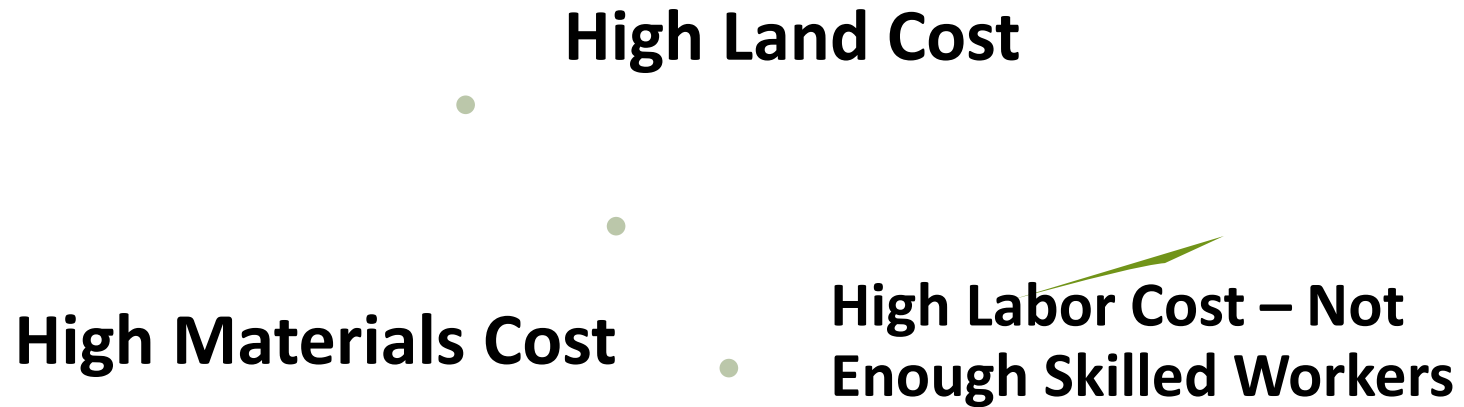


About 1/2 of our housing stock was built before 1960: 58+ years old





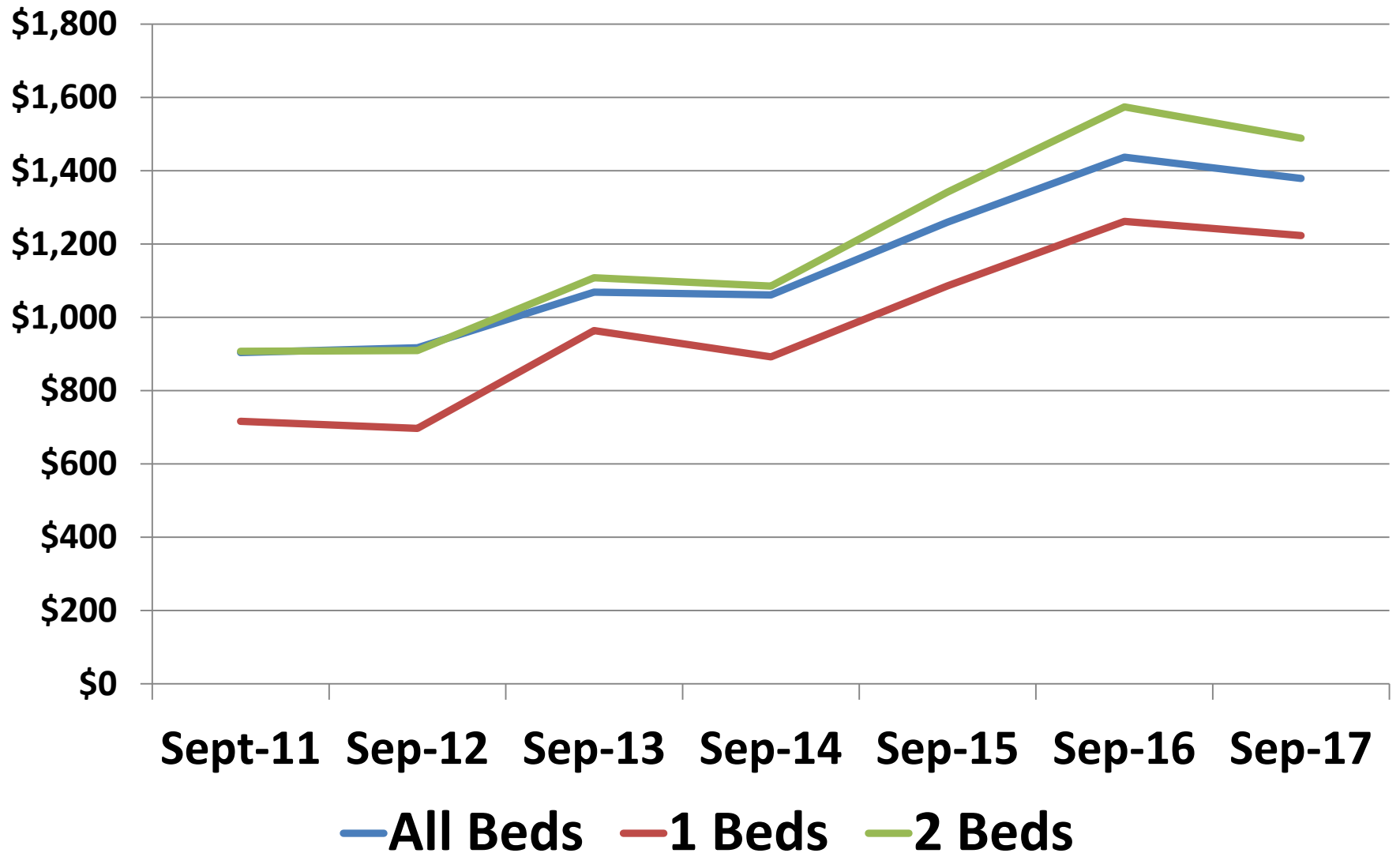
High Construction Costs Contribute To High-Cost Units



Low Affordable Housing Supply

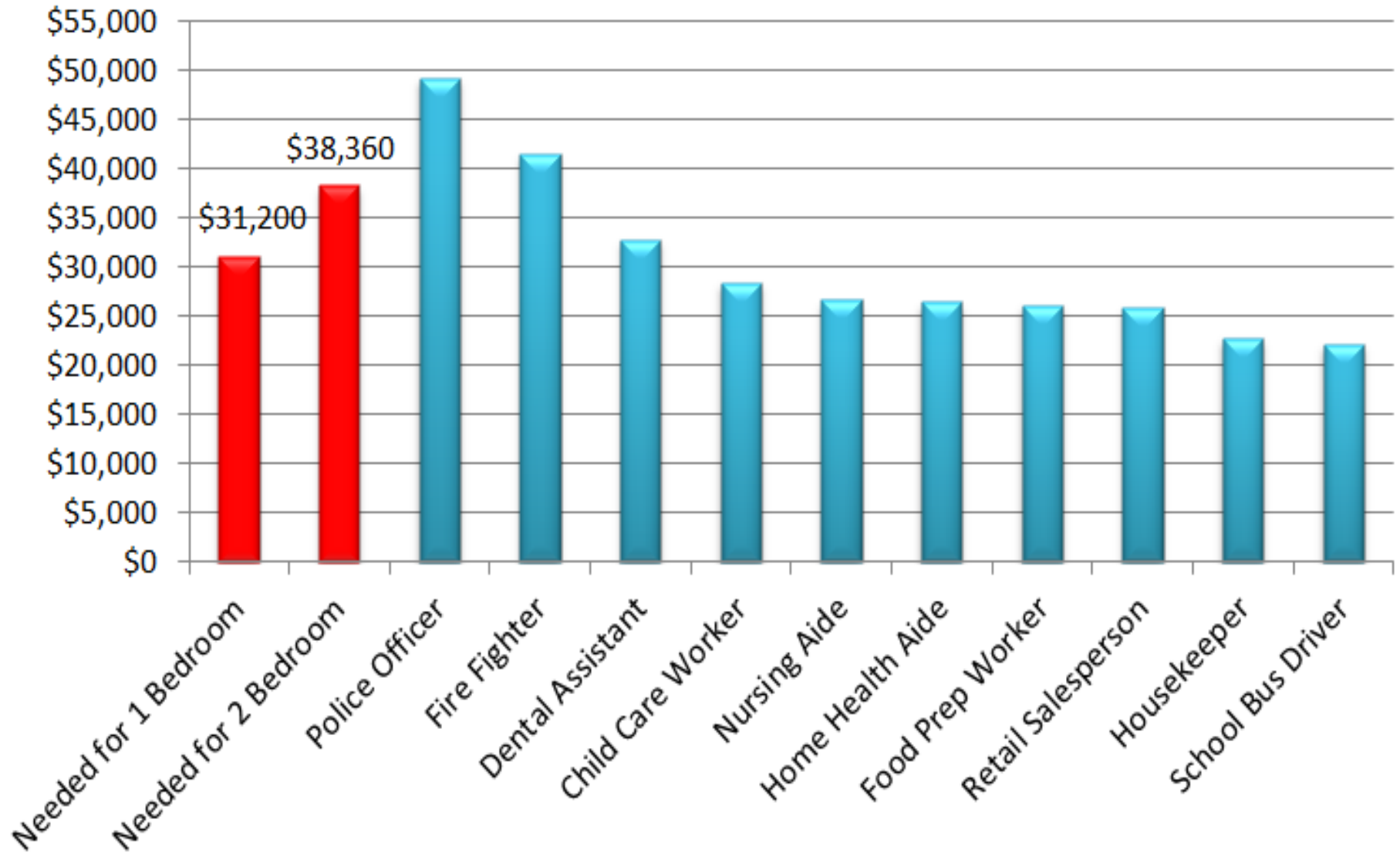


Average Rental Listing Prices – Davidson County



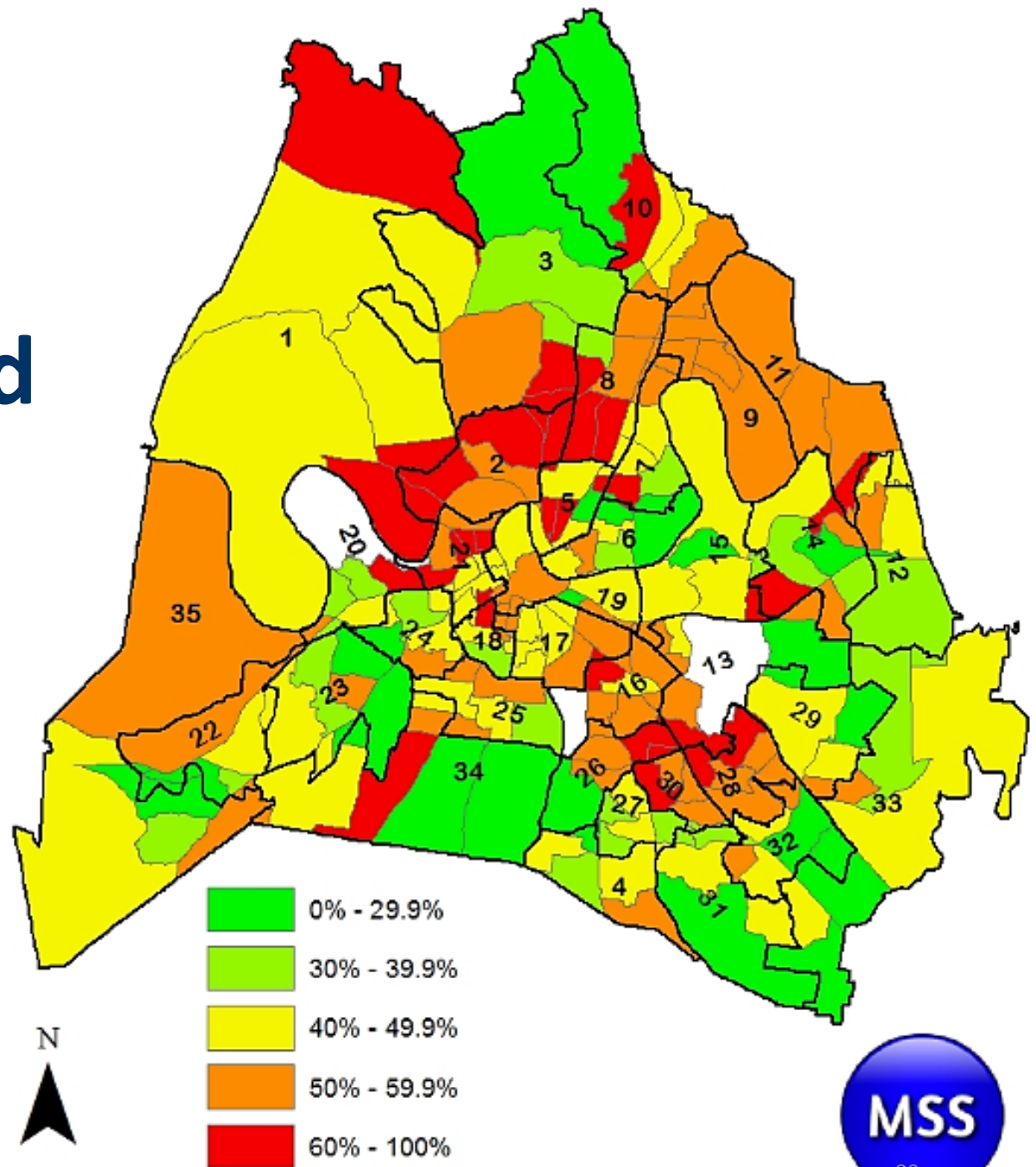


2017 Rental Costs for Nashville Area Workers



Cost Burdened Renters

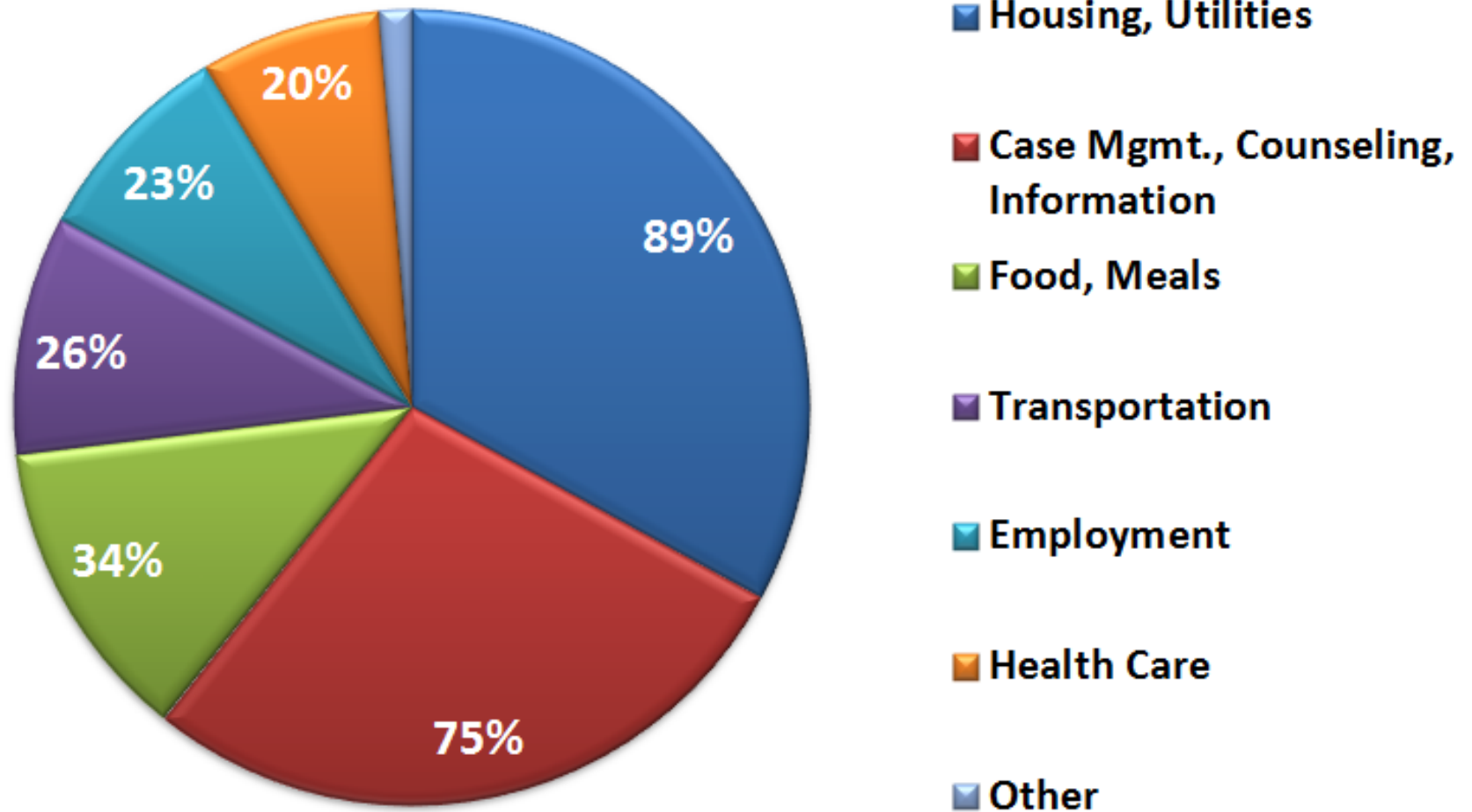
2012-2016





MSS Front Desk Survey 2017

What Do You Need?

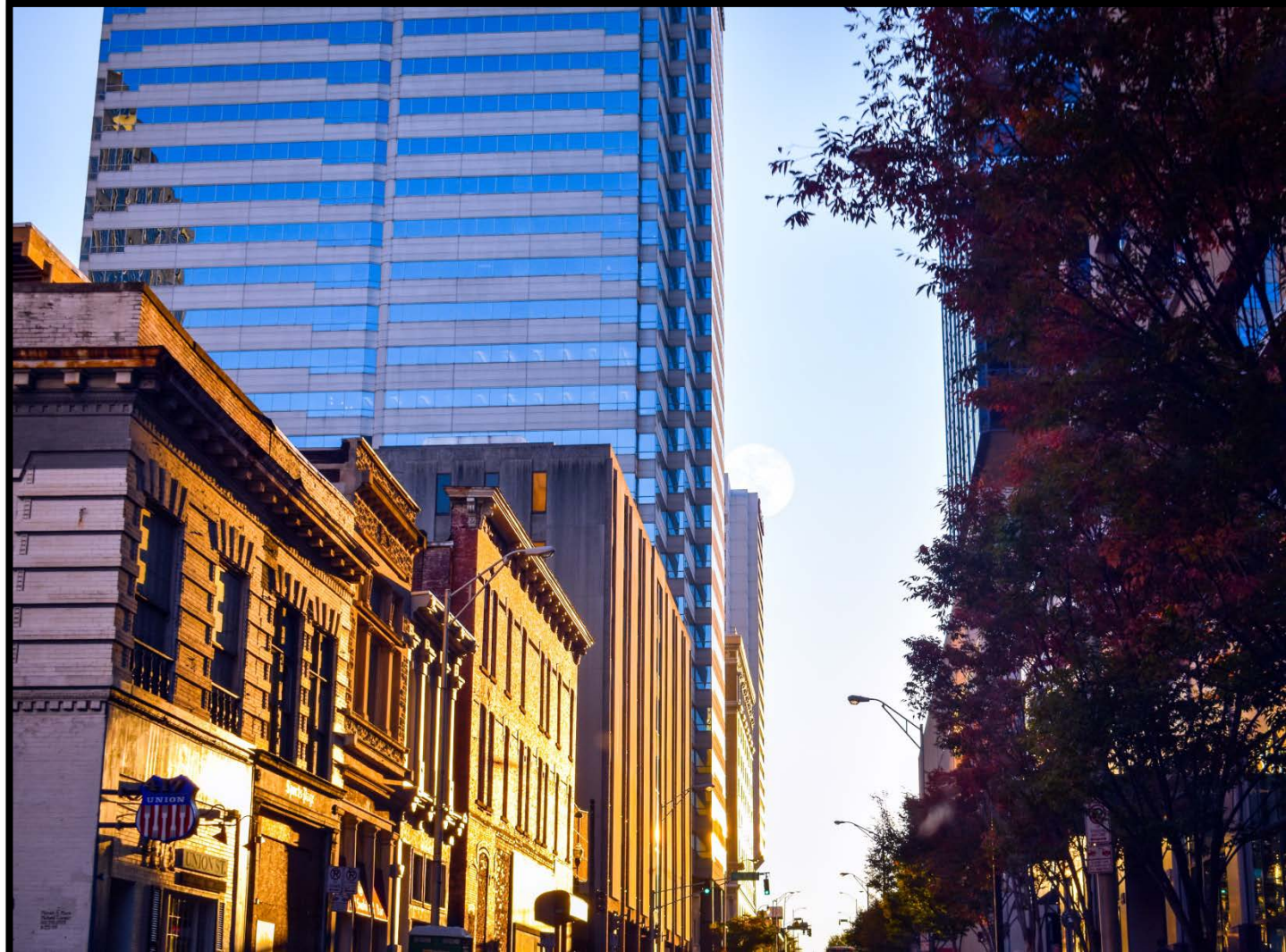




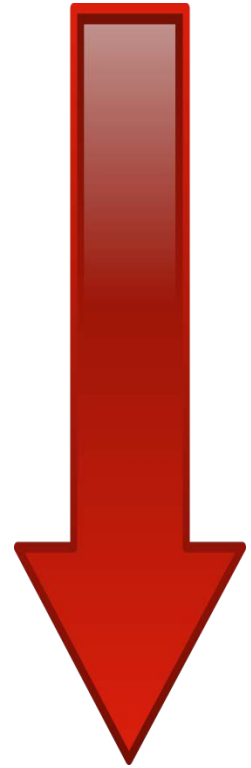


GERMANTOWN
Tour Today
Luxury Apartments
BroadstoneGermantown.com

Workforce

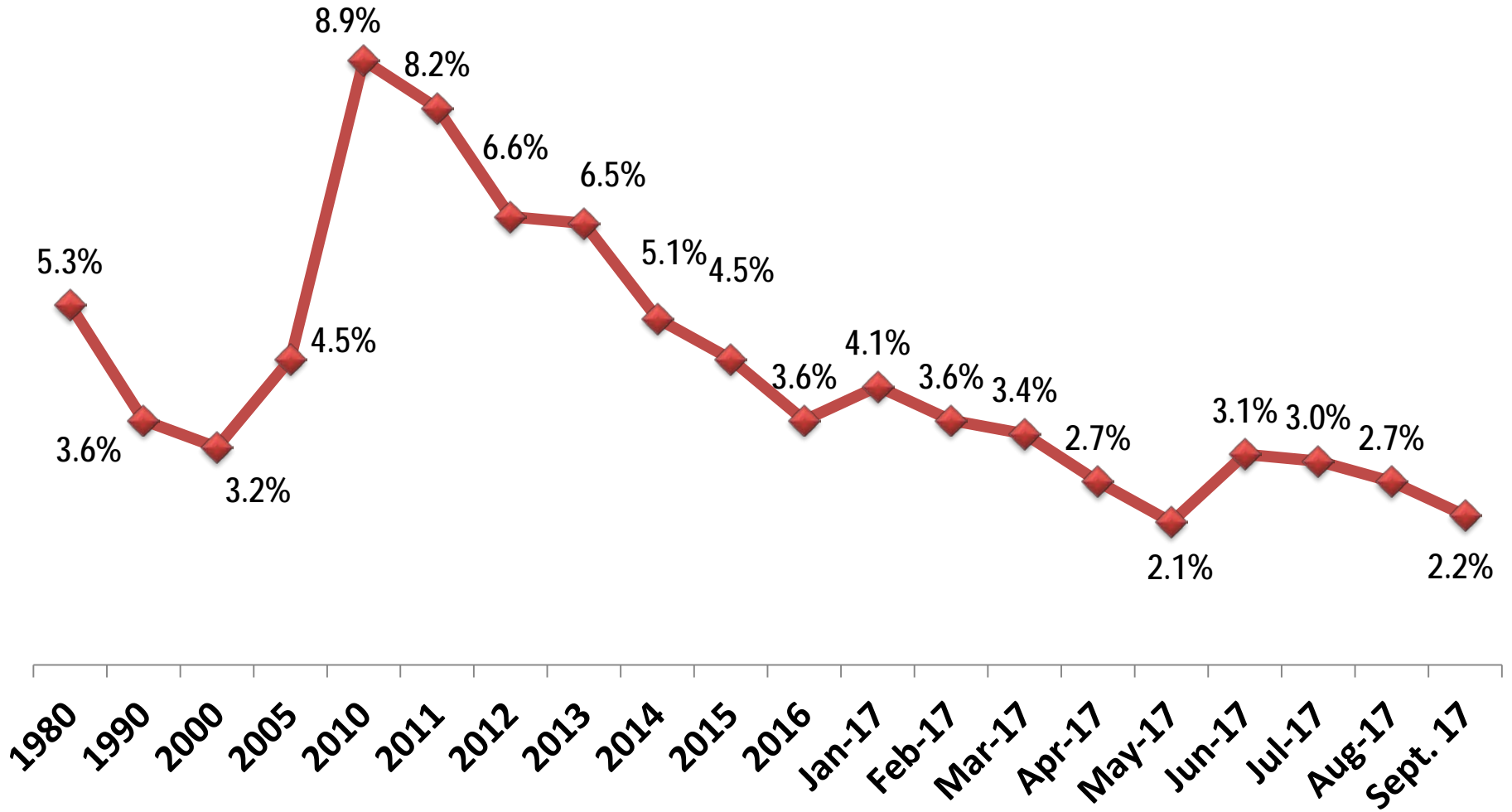


The **unemployment rate** in Davidson County continued trending down, and the lowest rate of 2017 was recorded in May at **2.1%**, levels that economists would consider even below full employment.



Unemployment Rate

Davidson County, 1980 - September 2017

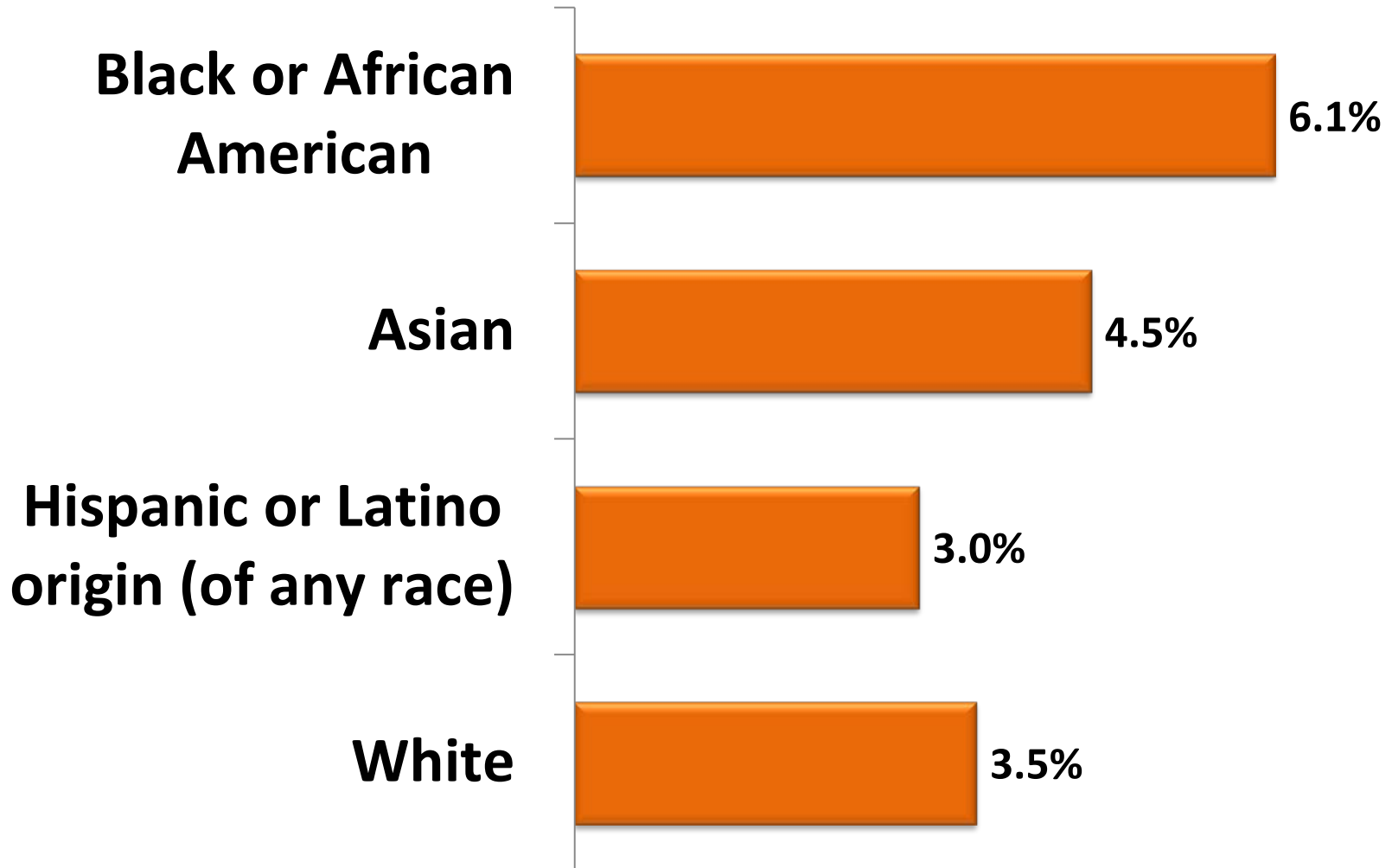


Minority Unemployment

Unemployment is higher among the Black or African-American population than for Asian, White, and Hispanic/Latino population of any race.

Unemployment by Race and Ethnicity

Davidson County, 2016

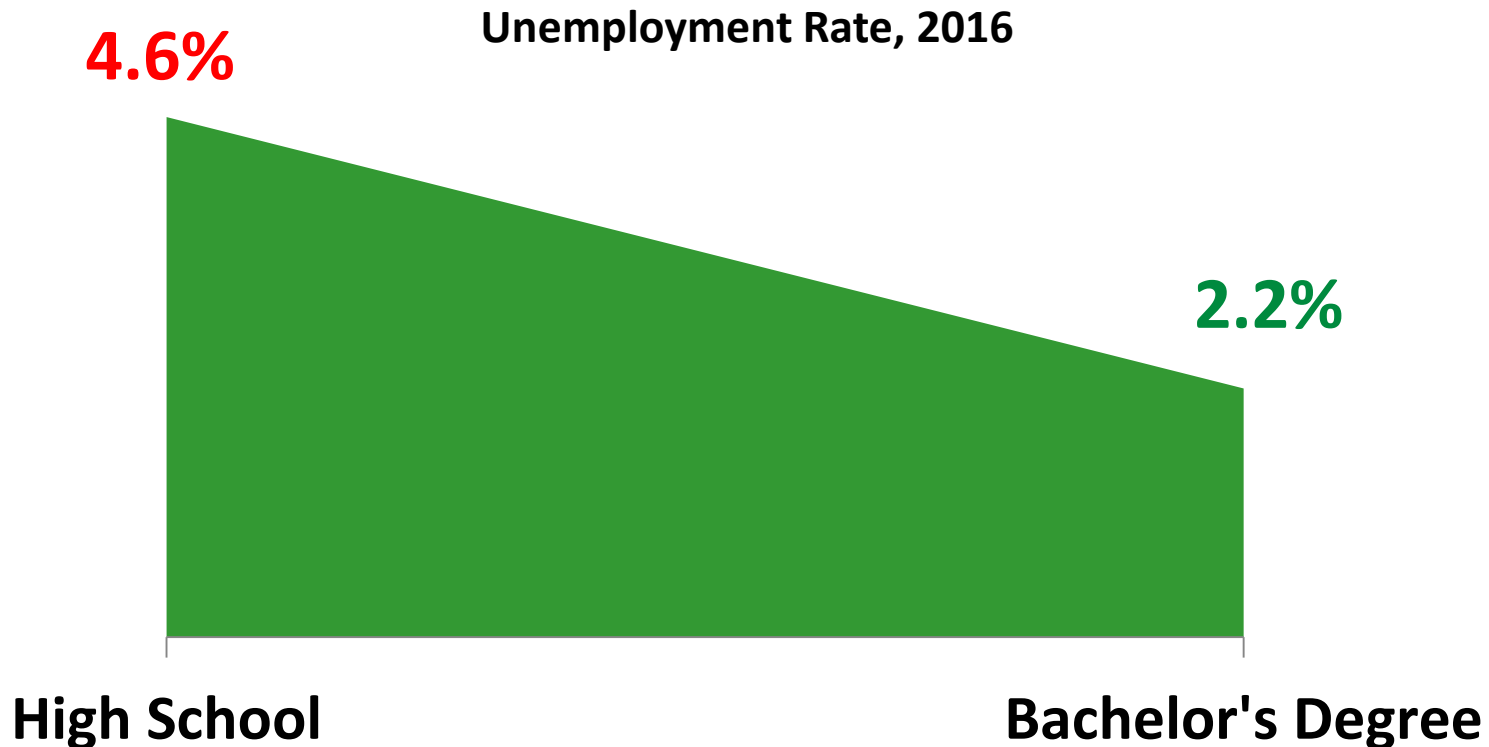




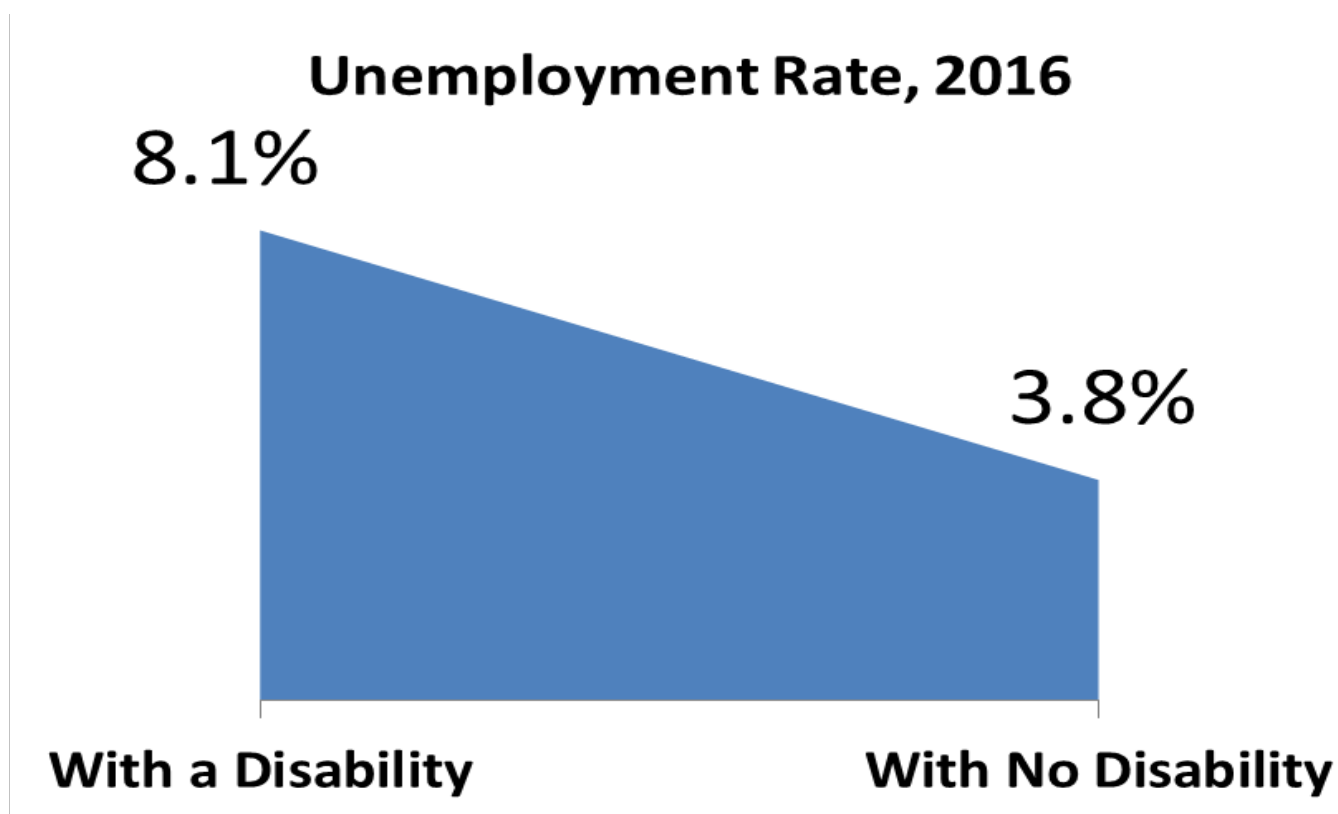
Educational Attainment

Workers with **less** education continue to experience a **higher unemployment** rate compared to those with higher levels of education.

The unemployment rate for workers with less than **high school** was **4.6%** in 2016, compared to **2.2%** unemployment for workers with at least a **bachelor's degree**.



Persons with **disabilities** are also more likely to experience **higher unemployment** rates than people who do not have disabilities.



African-Americans are more likely than Whites to be arrested, convicted and face stiffer sentences.

People of color make up 37% of the U.S. Population, but make up 67% of the prison population.



Long-Term Difficulties in Re-entering Society:

- Employment
- Housing
- Capacity to participate in other life improving opportunities

WORKFORCE CHALLENGES

- **Technology**
- **Globalization**
- **Weakened ability to bargain collectively**





Strategies for the Future

What happened?

How did we get here?



Financially Struggling Households

How did the struggle begin?

- In the 1970s and 1980s **Regulations** were seen as choking businesses and hurting their profits.



- **Deregulation** according to Merriam-Webster dictionary, “the act or process of removing restrictions and regulations”.

- Companies wanted to increase **Shareholder** Value



- **Stock buybacks** are corporate repurchases of their own shares of stock. Corporations do this as a means to boost the share price and provide shareholder value.

A Tennessee company has yearly earnings of \$1 million and 50,000 outstanding shares. The Earnings Per Share (EPS), then is \$20.

If it repurchases 10,000 of its shares, it now has 40,000 outstanding shares, its EPS immediately increases to \$25 even though its earnings did not increase.

From 2003 to 2012:

- Companies in the S&P spent **54%** of their earnings. . .
- A total of **\$2.4 trillion** to buy back **their own stock**.

~ William Lazonick



Staffing Agencies

- Use few workers
- Working temporarily
- With no benefits (including pensions)





Globalization

- Cheaper products
- Off-shoring

Technology

Reduces the number of workers it takes to produce the same or more level of output.

The Great Recession

**December 2007
to
June 2009**

Importance of Educational Attainment

- Occupations typically requiring **postsecondary** education **gained** 5.3 million jobs between May 2007 and May 2016.
- Occupations typically requiring **high school** for entry **lost** 1.3 million jobs between May 2007 and May 2016.

~U.S. Bureau of Labor Statistics



Weakened Collective Bargaining

- 20.1% or 17.7 million in 1983
- 10.7% of wage and salary workers or 14.8 million were union members in 2017

What was the RESULT?



A large pool of workers competing for shrinking job opportunities, which then depressed wages.

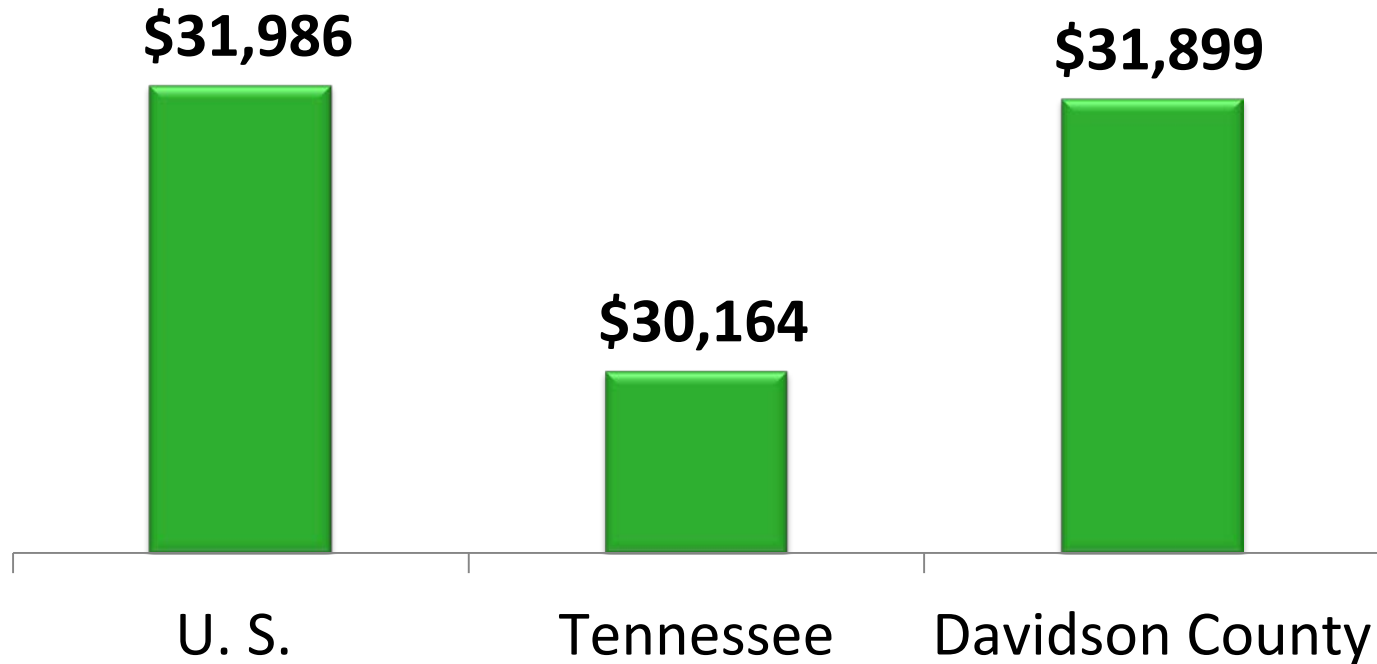
- Real average **hourly earnings** up 0.4%
- Real average **weekly earnings** up 0.7% percent in 2017



~U.S. Bureau of Labor Statistics

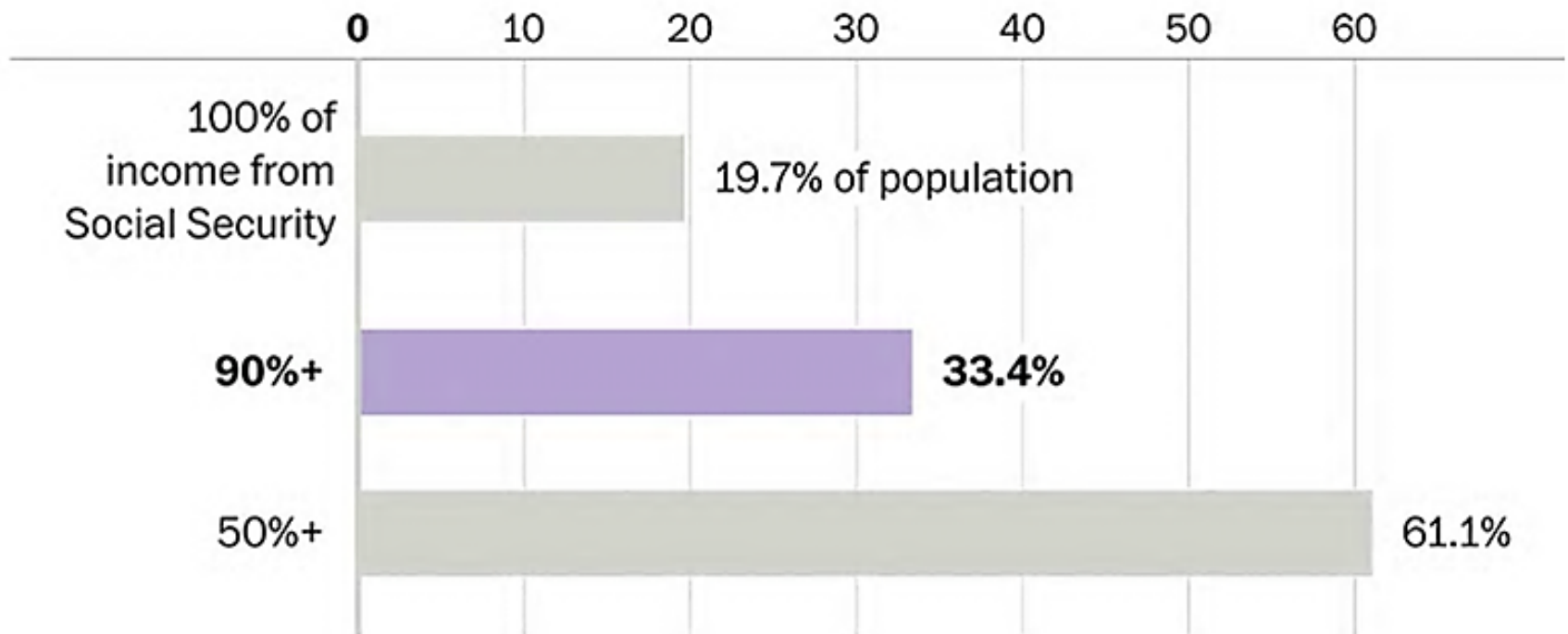
Median Worker Earnings for All Workers

U.S., Tennessee, Davidson County, 2016



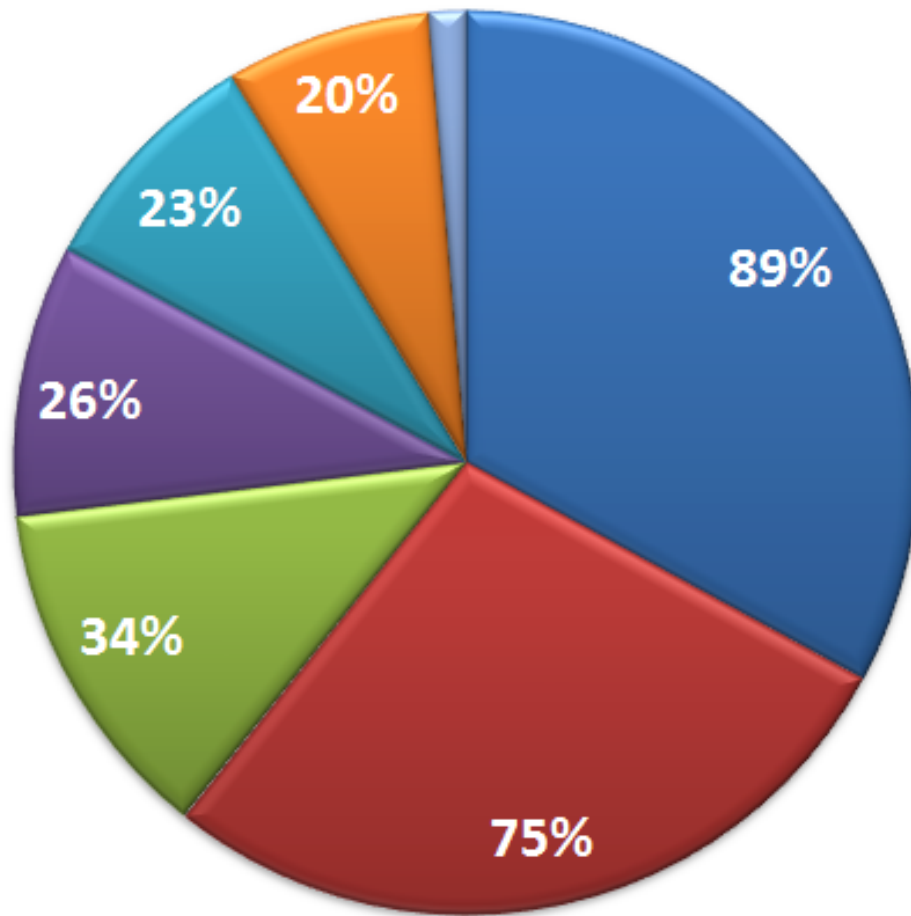
RELYING ON SOCIAL SECURITY

Nearly 20 percent of Social Security recipients 65 and older have no other income. For 33 percent, Social Security accounts for at least 90 percent of income.



Source: U.S. Social Security Administration; 2014 data

Metro Social Services – Front Desk Survey
July 2013 – October 2017
What do you need?



- Housing, Utilities
- Case Mgmt., Counseling, Information
- Food, Meals
- Transportation
- Employment
- Health Care
- Other

Banking Regulations

After the Great Depression, the U.S. Banking Act of 1933 was enacted to protect the U.S. economy from another severe depression. The Glass-Steagall provisions separated commercial and investment banking.

Glass-Steagall was **repealed** in 1999.

Banks are now allowed to have
Retail, Commercial, and Investment.

In 2016, U.S. banks, savings and loans and credit unions claimed **\$33.3 billion** worth of revenue from **overdraft fees**.

~Moebs Services, a bank research firm

- The average amount of money consumers **overdraft is about \$24.**
- Banks often **charge fees of around \$34** for each overdraft.

~Consumer Financial Protection Bureau



44% of adults say they either could not cover an emergency expense costing \$400, or would cover it by selling something or borrowing money

~Federal Reserve Bank, 2015

- **7% Unbanked**
- **20 % Underbanked**

~FDIC 2015



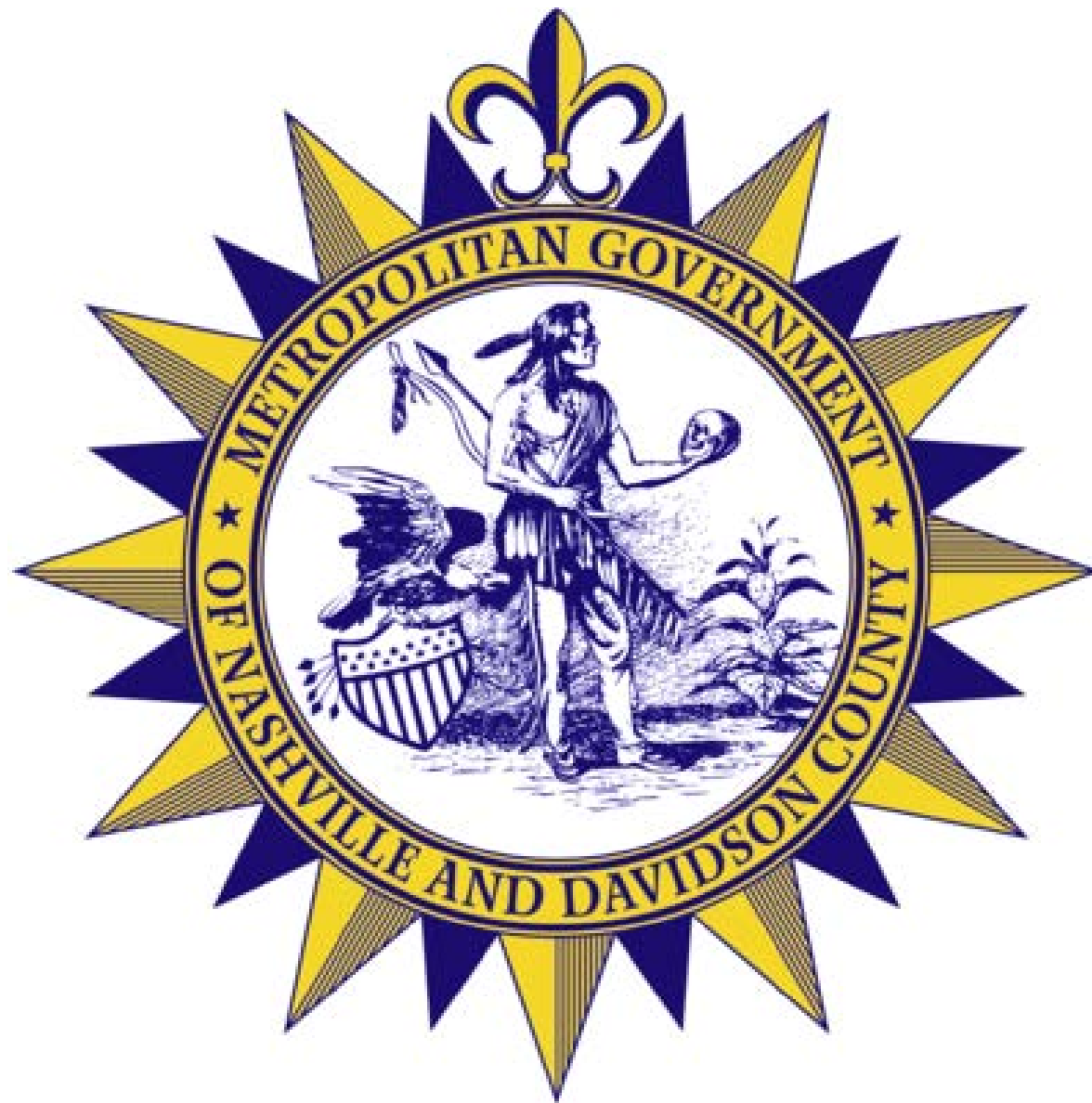
**The Greater Nashville area
boosted its supply of private-
sector jobs by 25% from mid-
2007 to mid-2017
(net job growth of 172,600 positions)**

~Nashville Business Journal August 30, 2017



Nashville ranked top city for higher-wage job growth since 2011 – 160,300, a 42% increase.

~Forbes Magazine, June 26, 2017



Unique Things Done by MSS

Alex Walker- Mayor's Office

Metro Cold Weather Overflow Shelter

- MSS is *the* city entity responsible for organizing and managing the Metro's Cold Weather Overflow shelter for at risk people
- These shelters not only provide a safe and warm place to weather the cold, they also provide food, blankets, hygiene kits and more
- This year alone, MSS coordinated and sheltered at risk individuals in the overflow shelter, with a daily average of 129 people during the 23 days it was open

Housing Assistance and Homelessness Prevention

- MSS is chartered to help displaced or evicted citizens and those on the verge of homelessness to find emergency resources to prevent homelessness.
- Last year, almost 90% of the people who came to MSS requested assistance with housing, utilities and other housing-related issues.
- By providing assistance with housing, children were able to stay in their current school districts, preventing them from being uprooted mid-school year.

Nutrition

- MSS is the largest meal provider for elderly and disabled individuals in Davidson County
- In 2017, MSS served an average of more than 12,400 meals each month to elderly and disabled Nashvillians, many of whom are on fixed incomes.
- Providing nutritious meals to elderly and disabled individuals allows them to remain healthy in their own homes and lowers their health costs.



Indigent Burial

- MSS is the only designated county provider of burial services for residents with no financial resources.
- Davidson County is the only county in the state that provides these services, and MSS has taken on this role and provides *dignified* burials.
- This service also helps to protect the health of the community.

CNE and *Know Your Community*

- MSS is the only entity that annually documents and reports up-to-date county information about households that financially struggle to pay bills, those who are aging or live with disabilities, families who can't find affordable housing, unemployment, inadequate nutrition, and other social and economic indicators.
- MSS also publishes ***“Know Your Community,”*** providing relevant detailed social and economic information about residents in every Council District that is used by elected officials, policy makers, advocates & the general public.



Metropolitan Social Services welcomes the Keynote Speakers

Keynote Speakers



Commissioner Danielle Whitworth Barnes

Tennessee Department of Human Services

Sally Avery, Director

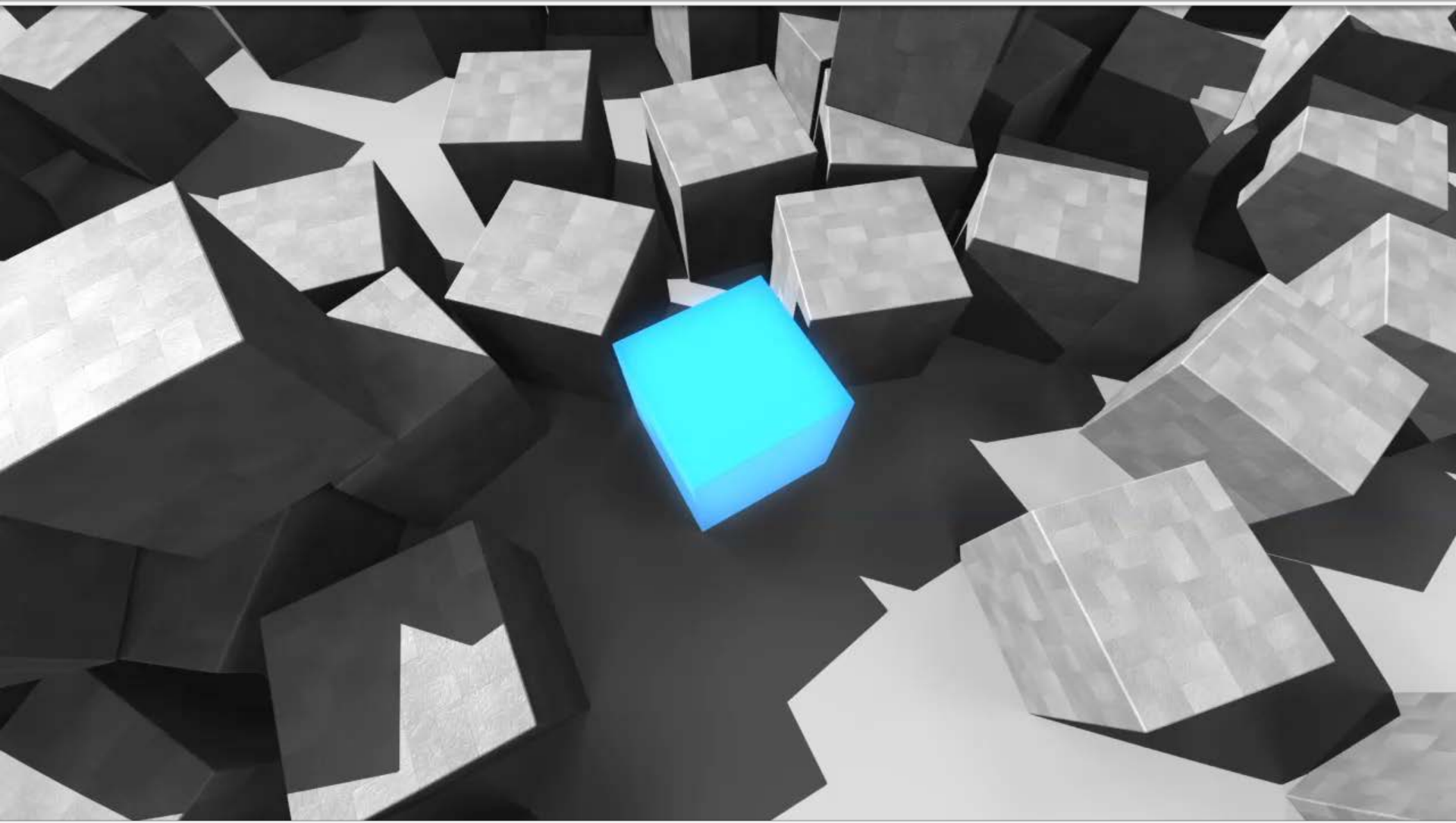
Center for Economic Research in Tennessee (CERT)

Tennessee Department of Economic and Community Development

Commissioner Danielle Whitworth Barnes

Tennessee Department of Human Services





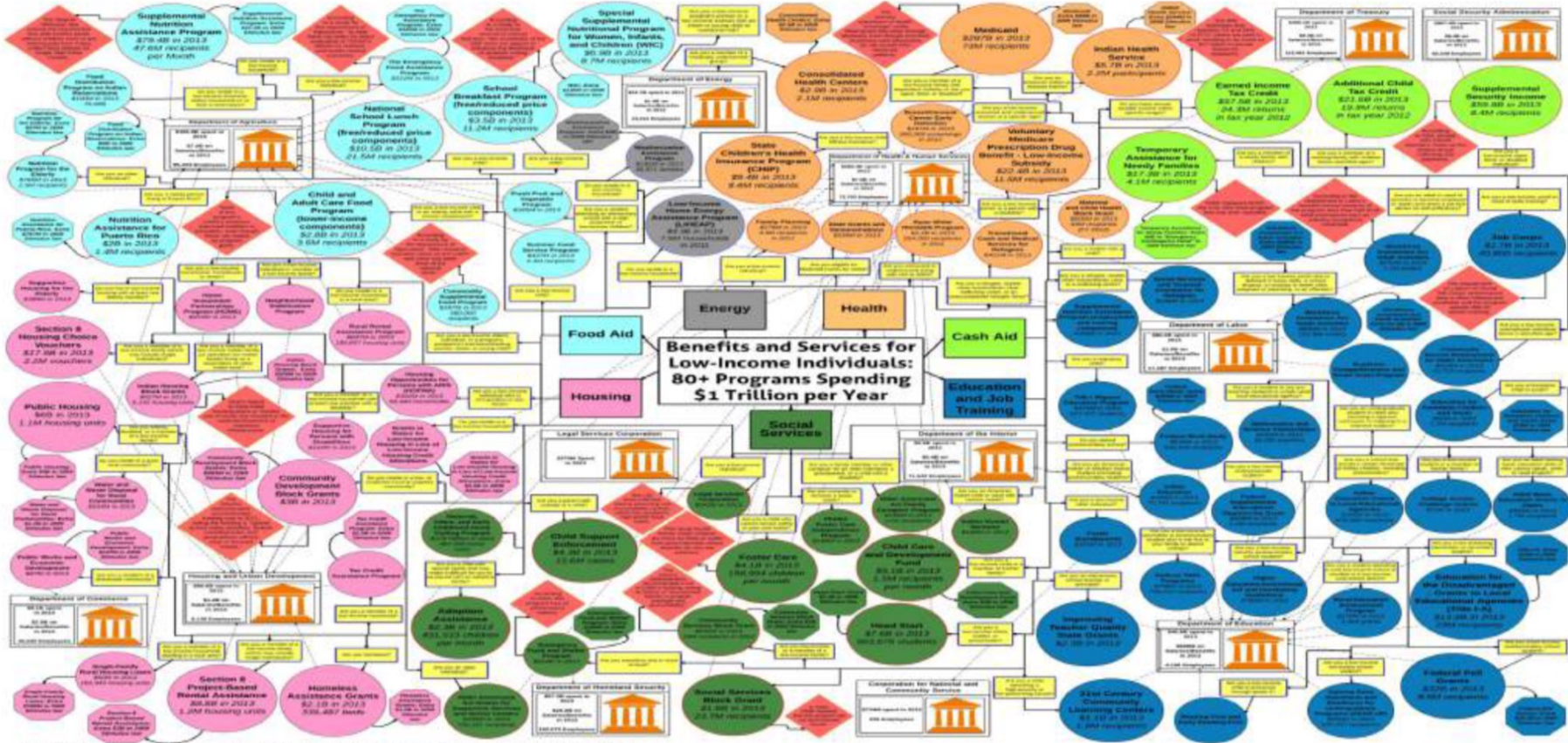
**Building Partnerships,
Building Cycles of Success**

Claire



BENEFITS AND SERVICES FOR LOW-INCOME INDIVIDUALS

80+ PROGRAMS



Source: House Ways and Means Committee staff, using Congressional Research Service reports and other data.

Services

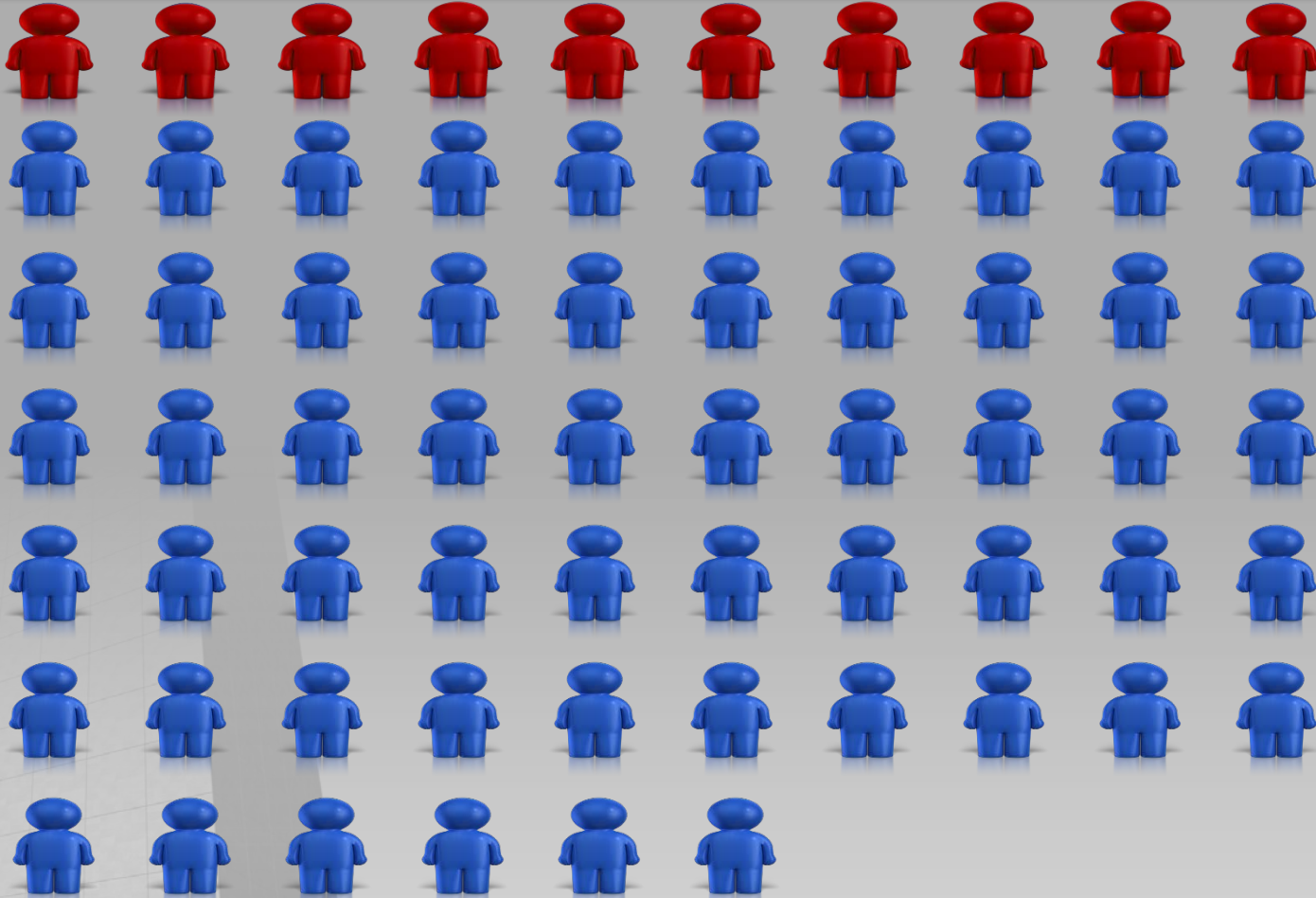






Difficulty Navigating











Poverty in Tennessee


















= 100,000 people

ACEs: Adverse Childhood Experiences

Three Types of ACEs

ABUSE	NEGLECT	HOUSEHOLD DYSFUNCTION	
 Physical	 Physical	 Mental Illness	 Incarcerated Relative
 Emotional	 Emotional	 Mother treated violently	 Substance Abuse
 Sexual		 Divorce	

ACEs Increase Health Risks

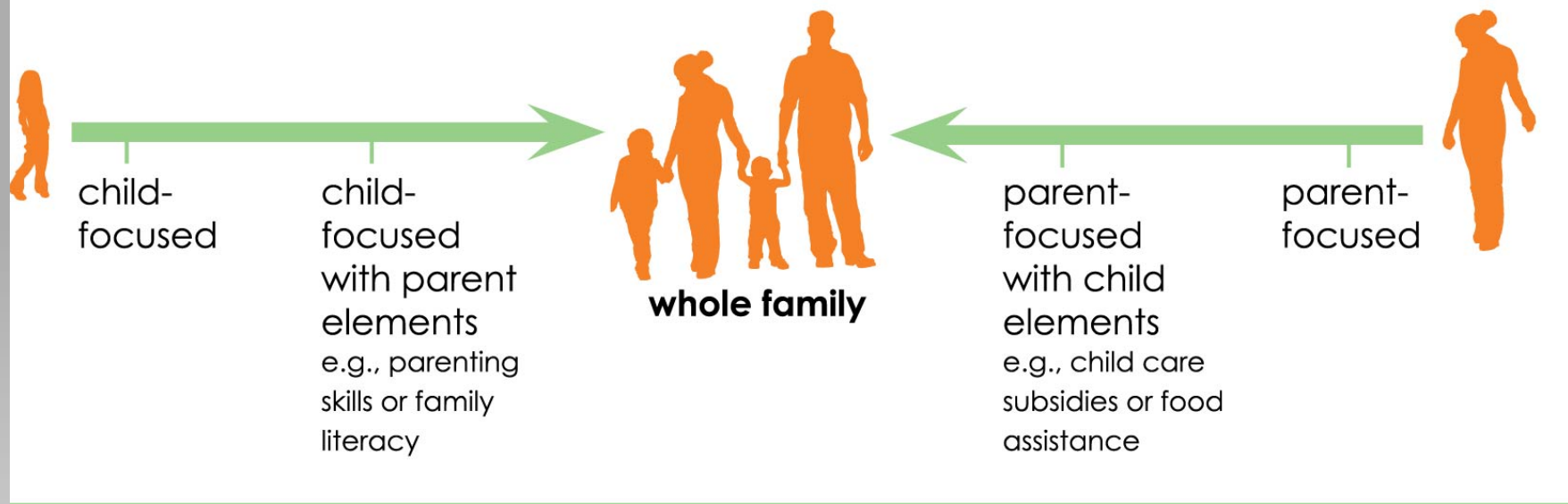
BEHAVIOR				
 Lack of physical activity	 Smoking	 Alcoholism	 Drug use	 Missed work
PHYSICAL & MENTAL HEALTH				
 Severe obesity	 Diabetes	 Depression	 Suicide attempts	 STDs
 Heart disease	 Cancer	 Stroke	 COPD	 Broken bones



Navigation Assistance

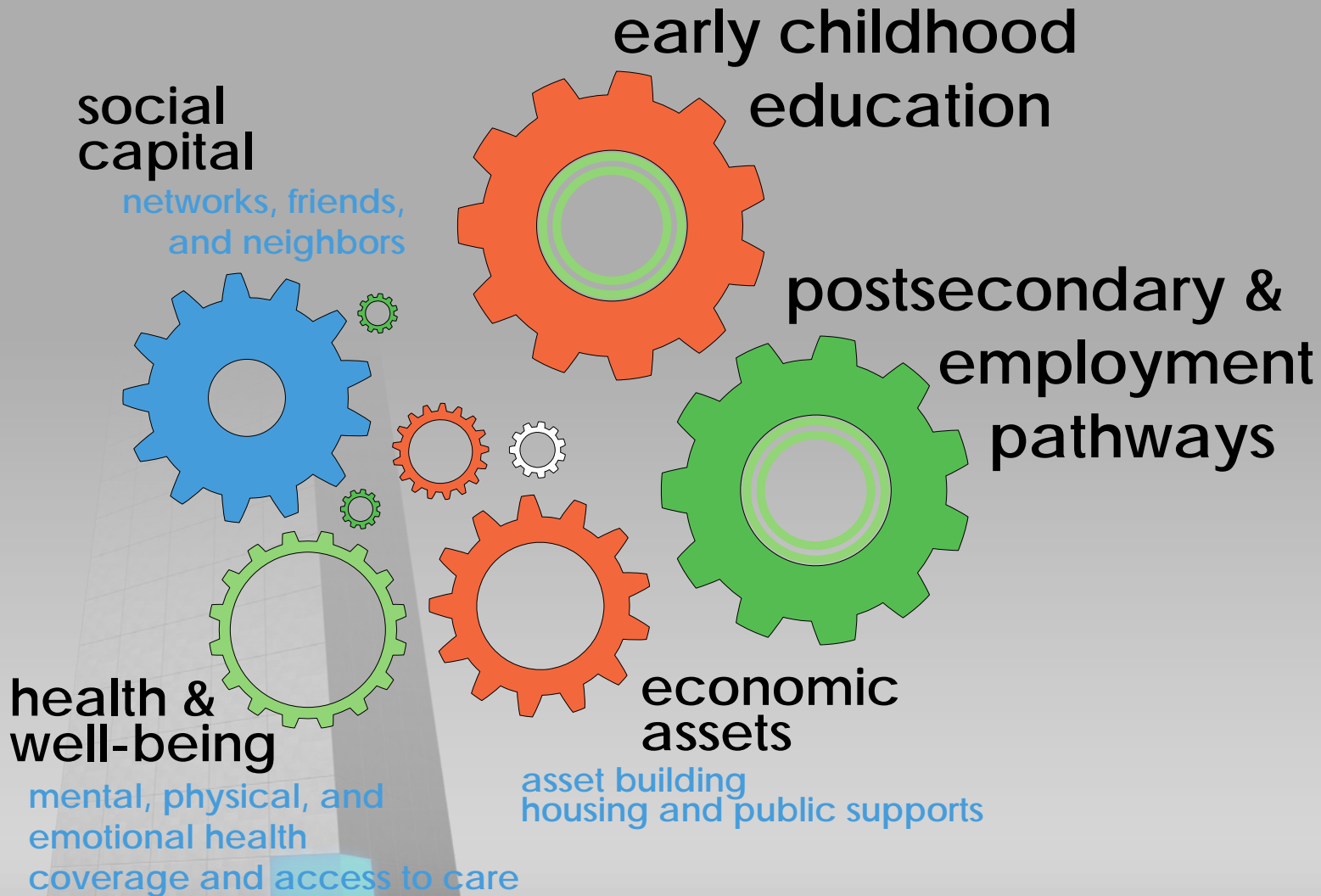
2 Gen Approach

The Two-Generation Continuum

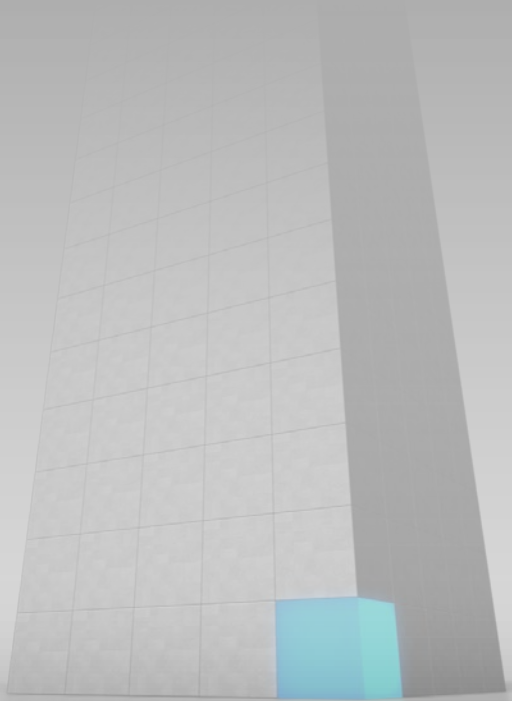
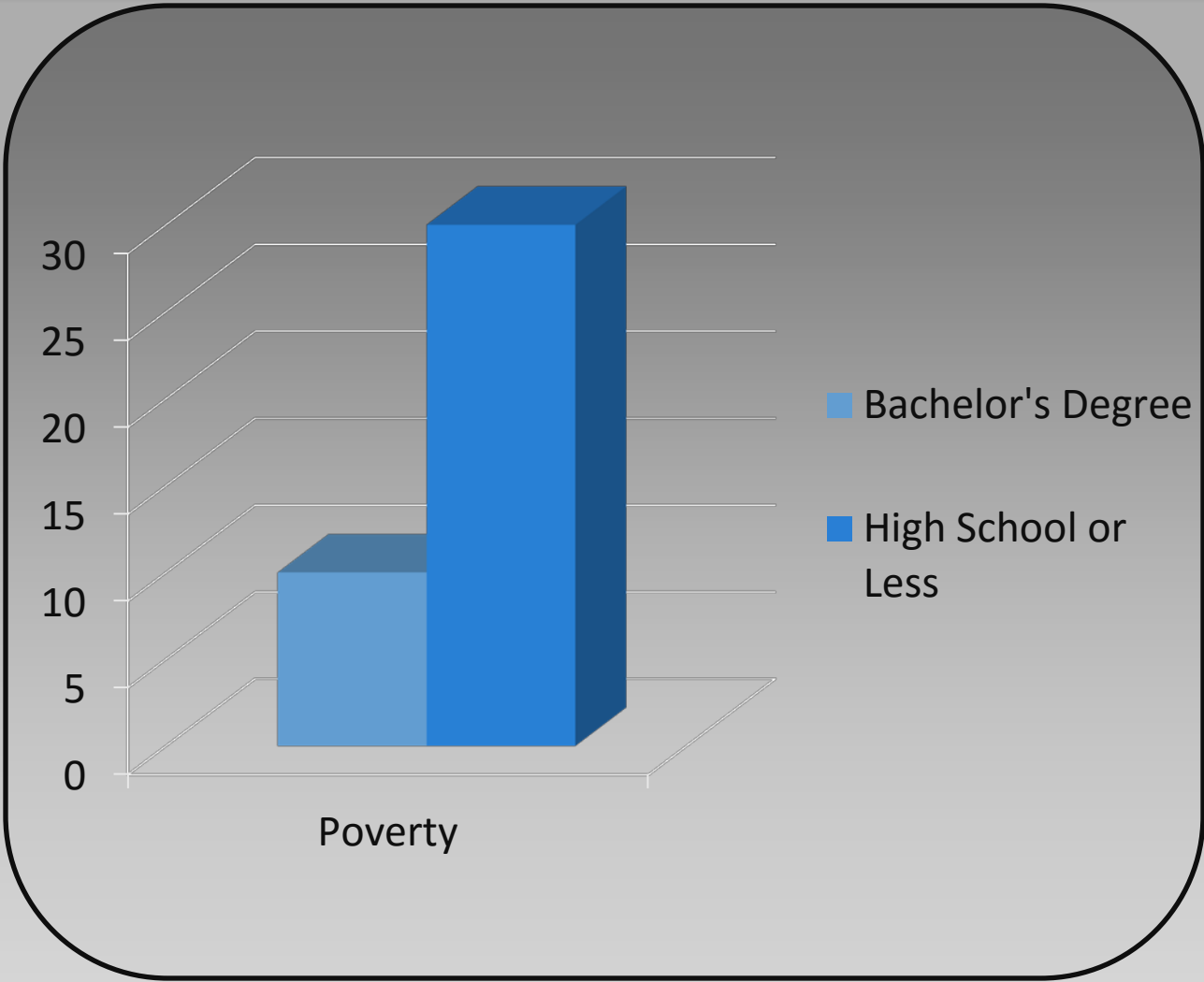


The two-generation approach provides opportunities for and meets the needs of children and their parents together.

2 Gen Approach



Poverty Vs. Education



Education



Drive to 55
ALLIANCE



TENNESSEE
Promise



TENNESSEE
Reconnect

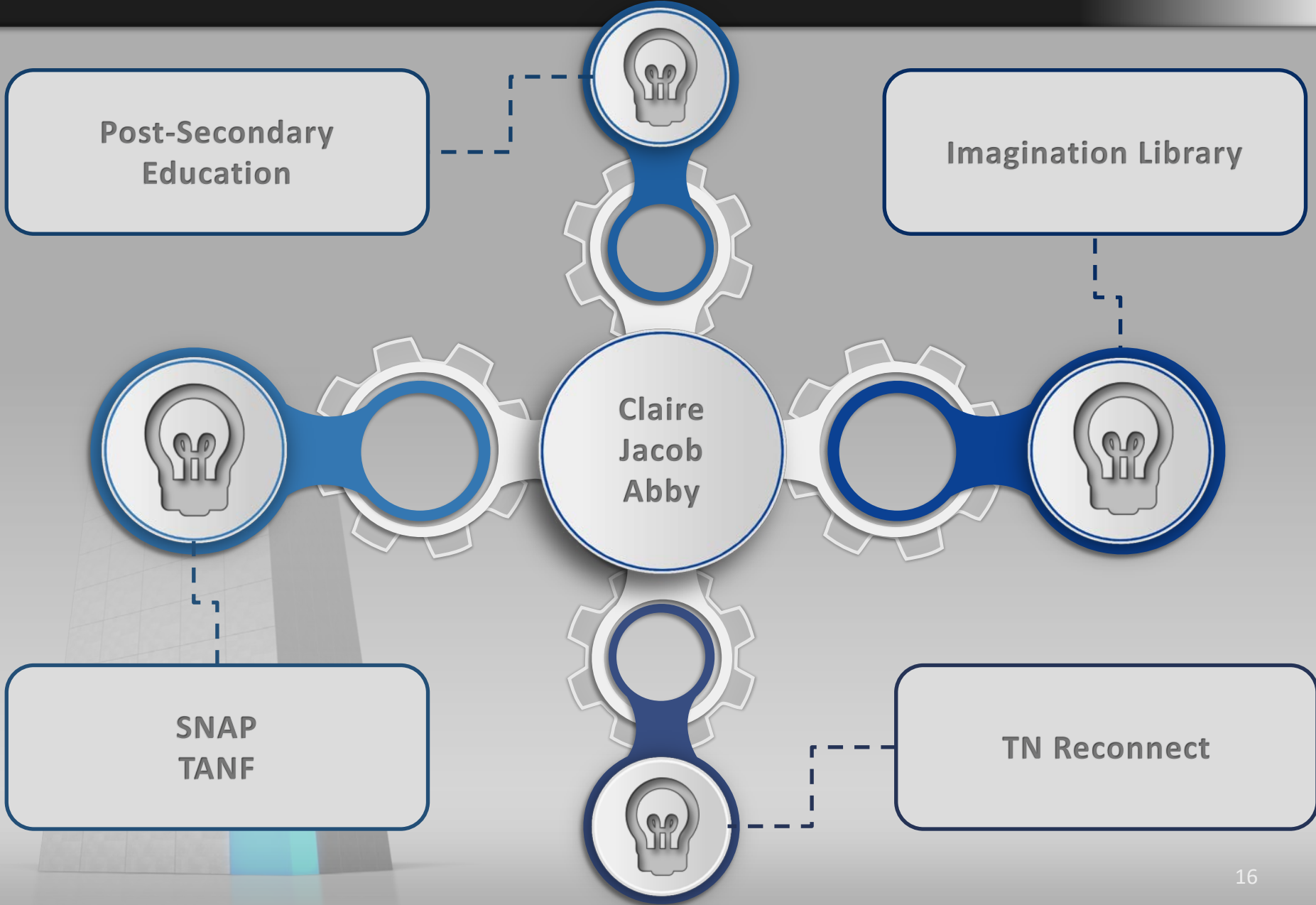
Education



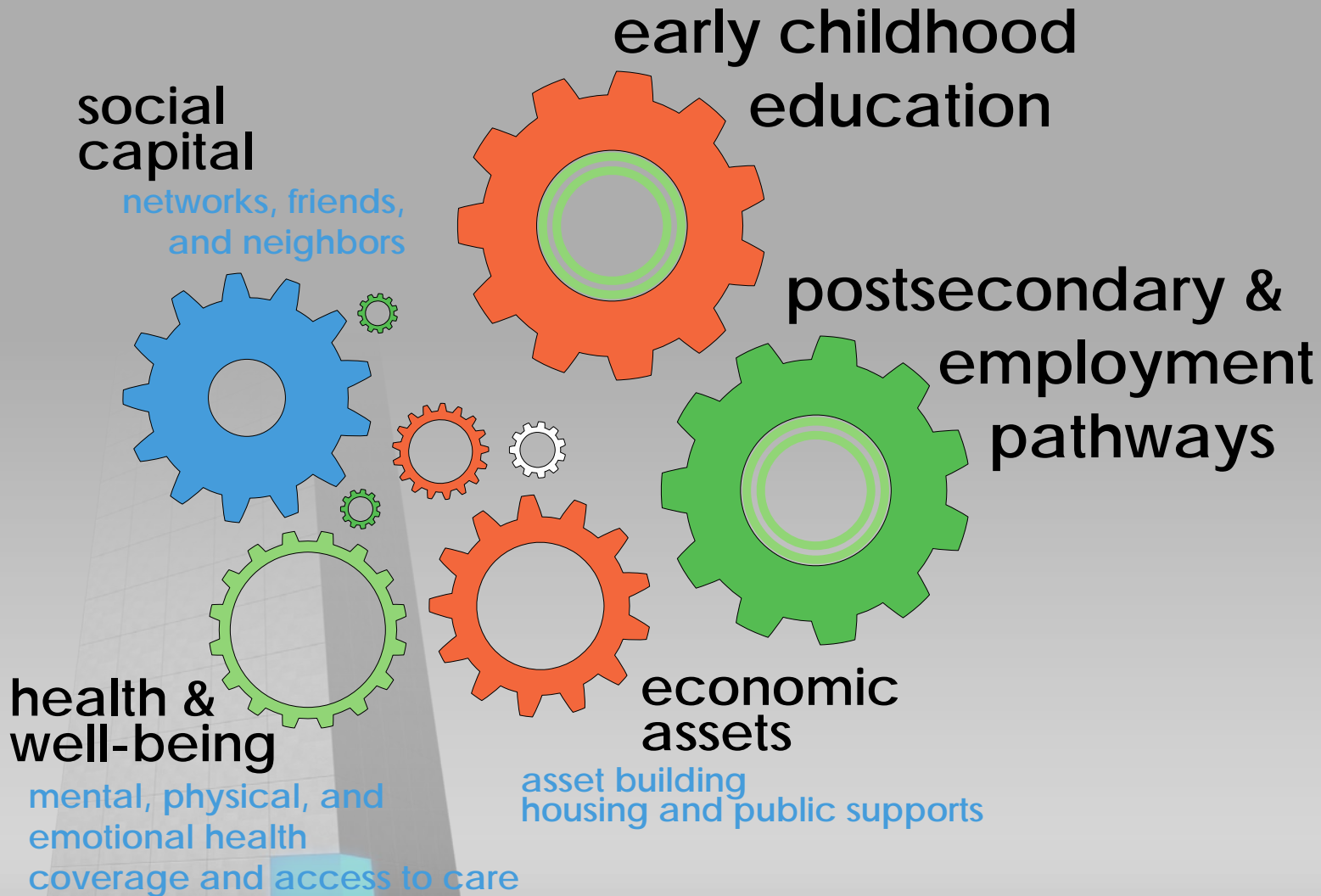
GOVERNOR'S
BOOKS
from **BIRTH**
FOUNDATION



Education



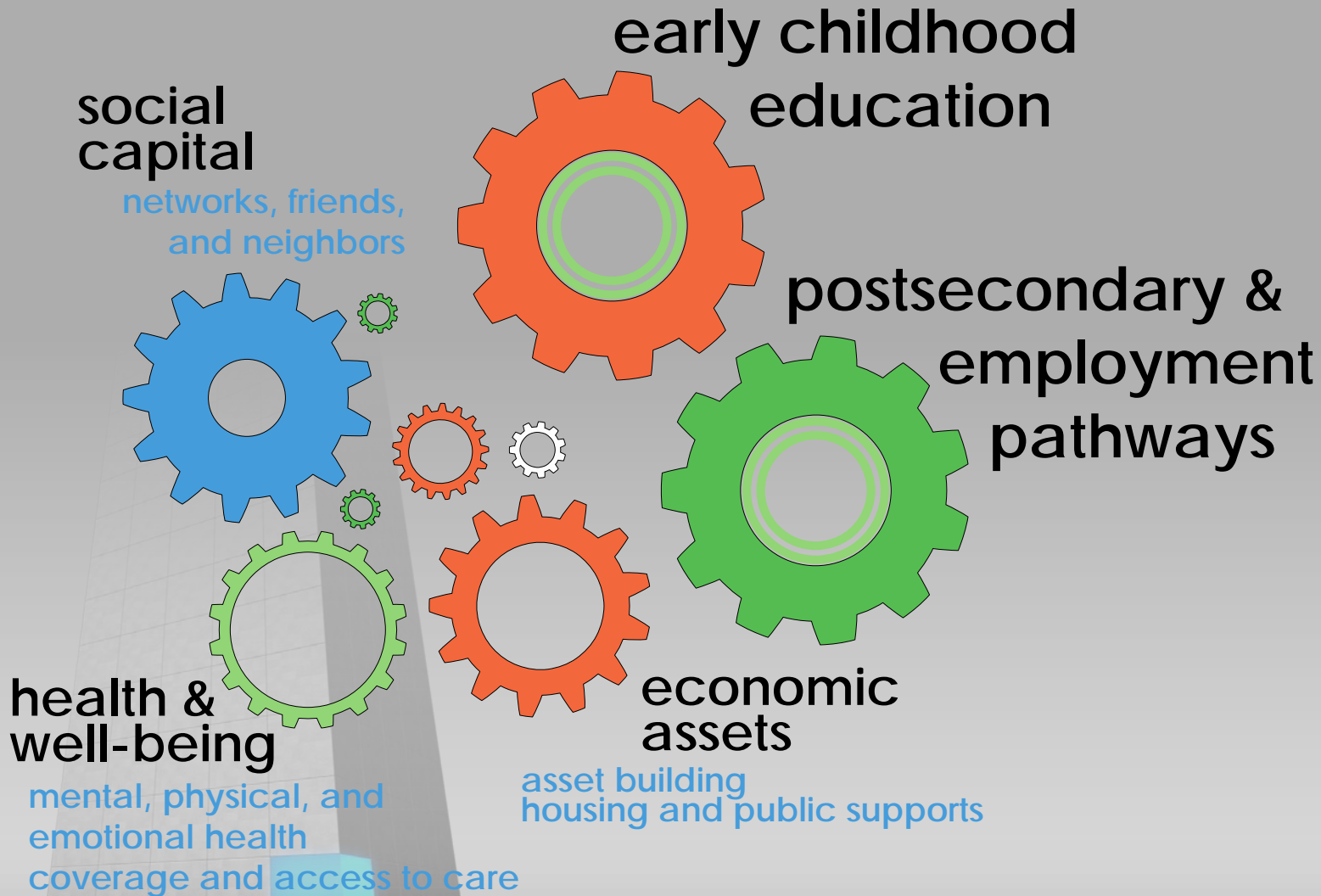
2 Gen Approach



Smart Steps



2 Gen Approach



Health and Wellbeing

Early
Childhood
Education

Post-
Secondary
Education

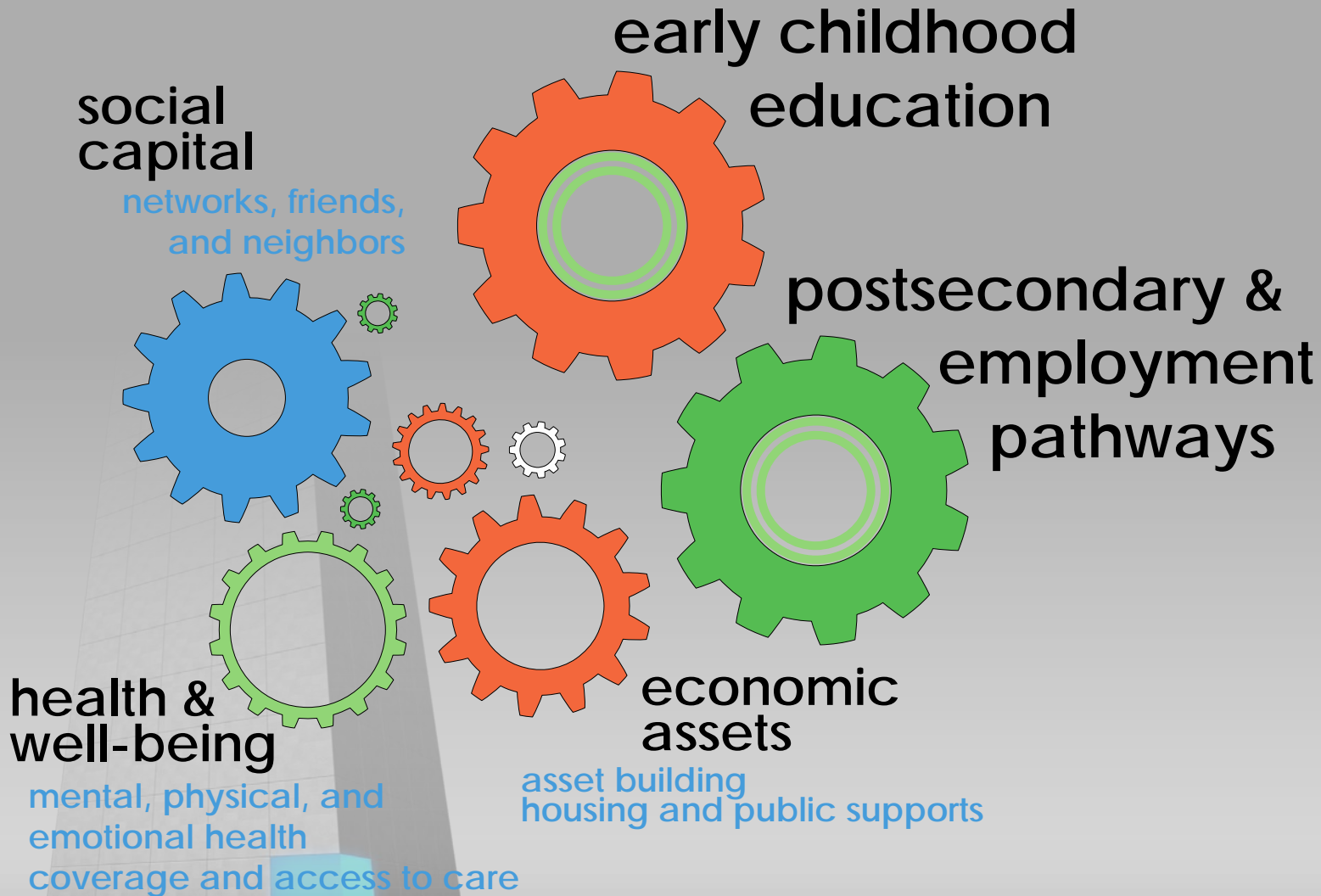
Economic
Literacy

Workforce
Readiness



Health

2 Gen Approach

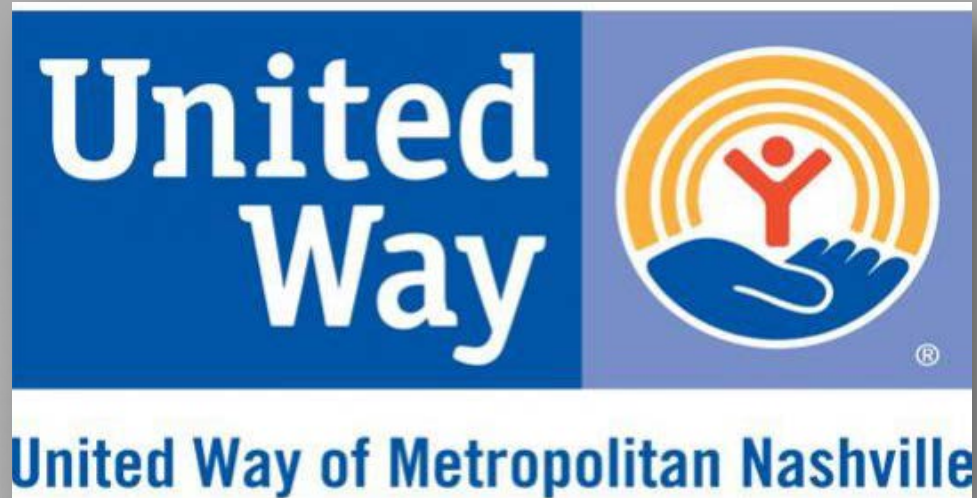


Social Capital

Education

Upward
Mobility

Economic
Literacy



Health
Indicators

Workforce
Readiness

Community
Engagement

A 3D architectural rendering of a modern building facade with a grid pattern and a blue cube.

Increase Impact

Building Partnerships, Building Cycles of Success



Sally Avery, Director

Center for Economic Research in Tennessee (CERT)

Tennessee Department of Economic and Community Development



Center For
Economic Research
in Tennessee
(CERT)

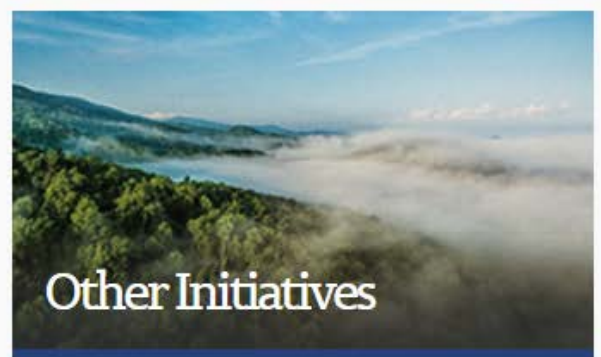


Sally Avery

February 21, 2018

ECONOMIC & COMMUNITY DEVELOPMENT

We are passionate about developing dynamic, diverse economies and thriving communities for generations of Tennesseans.





CENTER FOR ECONOMIC RESEARCH IN TENNESSEE (CERT)

**Corporate Decision-
Making**

**Project & Incentive
Evaluation**

**Performance
Metrics**

Trend Analysis

LONG TERM OBJECTIVES

Unemployment Rate

Goal (2025): Rank #1 Lowest in the Southeast
Current Status (December 2017):

3.2% ▲0.1

(Rank: #1 of 12 States)

Personal Income Per Capita

Goal (2025): Rank #1 or #2 Highest in the Southeast
Current Status (2017 Q3):

\$44,325 ▲\$154

(Rank: #3 of 12 States)

Capital Investment Per Capita

Goal (2025): Rank #1 Highest in Southeast
Current Status (2017):

\$559 ▼-\$165

(Rank: #5 of 12 States)

No. of Distressed Counties

Goal (2025): 0 of 95 Counties
Current Status (FY2018):

19 ▲+2

High Quality Job Commitments

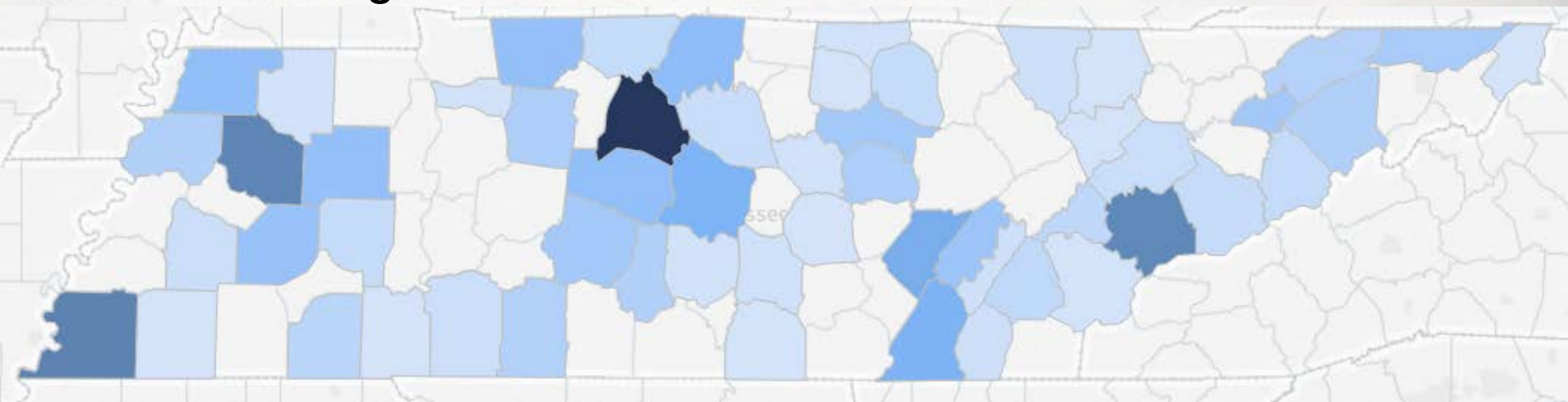
Goal (2025): 55% of TNECD Job Commitments
Current Status (2017):

55.6%

(real-time)

EXPANSION/RECRUITMENT, 2017

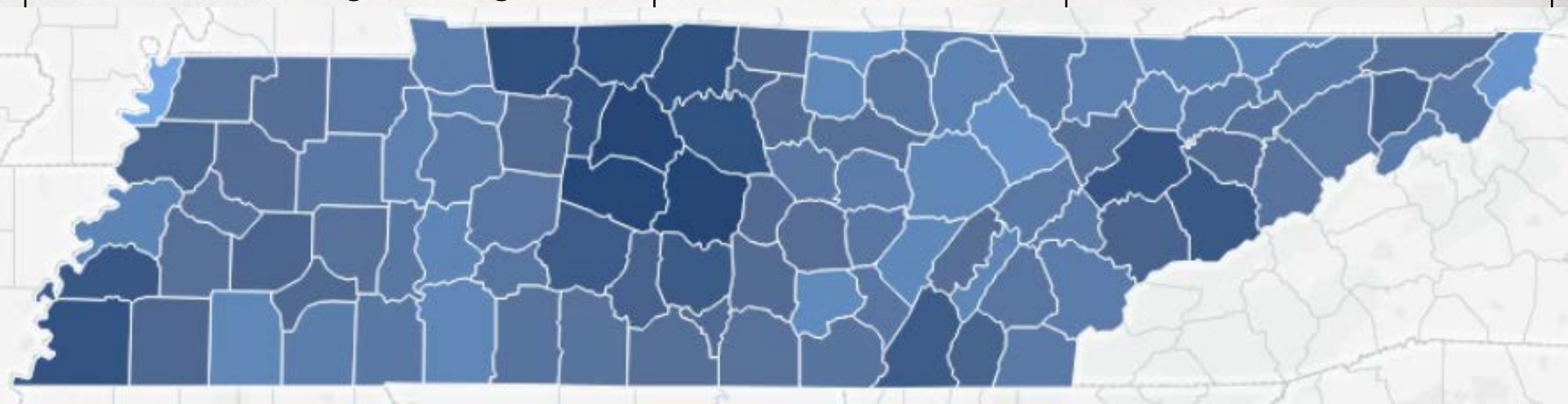
- **156** company commitments to create **21,483** new jobs and invest **\$4.5 billion**
- **45.2%** in rural counties (increase from 31.7% 5 years ago)
- **55.6%** above county median wage
- **59.3%** expansion; 36% recruitment
- **31.3%** foreign-based



TENN. WORKFORCE, 2017

- 23,700 net new private sector jobs (.92% job growth)
- Labor force grew **2.0%** (+62,922)—11th highest growth rate in nation
- Unemployment declined **37.2%** (-60,549)—2nd greatest decline in nation
- Labor force participation (61%) ranks **12th lowest** in nation.

Highest Degree Level	LFPR Range, 2016	LFPR Median, 2016
No HS degree	20-69%	47%
HS Degree	36-77%	69%
Some college or Associate's	49-87%	74%
Bachelor's or higher degree	61-97%	83%



SKILLS GAPS

- CERT annually evaluates job classifications which Tennessee employers have a high demand to fill
- Programs of study necessary to meet employer demand
- METHODOLOGY: Identify occupations with a high ratio of **job postings** to employment, **hires** to employment and/or **job openings**. Occupations with an above-average ratio for 2 of these 3 indicators are considered to be in “high” employer demand. Thresholds:
 - ✓ **Median Wage** for the occupation must be at least 75% of the region’s median wage
 - ✓ **Employment**: Occupation’s employment must be at least 0.04% of region’s total employment



PRODUCTION

Occupations with High Demand

Tool & die makers	Welders, cutters & brazers	Multiple machine tool setters/operators
Electrical & electronic equipment assemblers	Cutting, punching & press machine setters/ operators	

Related Program	Tennessee				
	Completions (2016)	Openings (2017)	Median Wage	Jobs (2017)	Jobs (2027)
Machine Shop Technology	143	2,651	\$16.91	19,604	22,824
Industrial Electronics Tech.	76	845	\$16.69	6,399	7,065
Machine Tool Technology	224	3,530	\$16.76	27,715	29,368
Tool & Die Technology	17	303	\$22.05	2,625	2,723
Welding Technology	622	1,306	\$17.63	10,401	10,963

IT

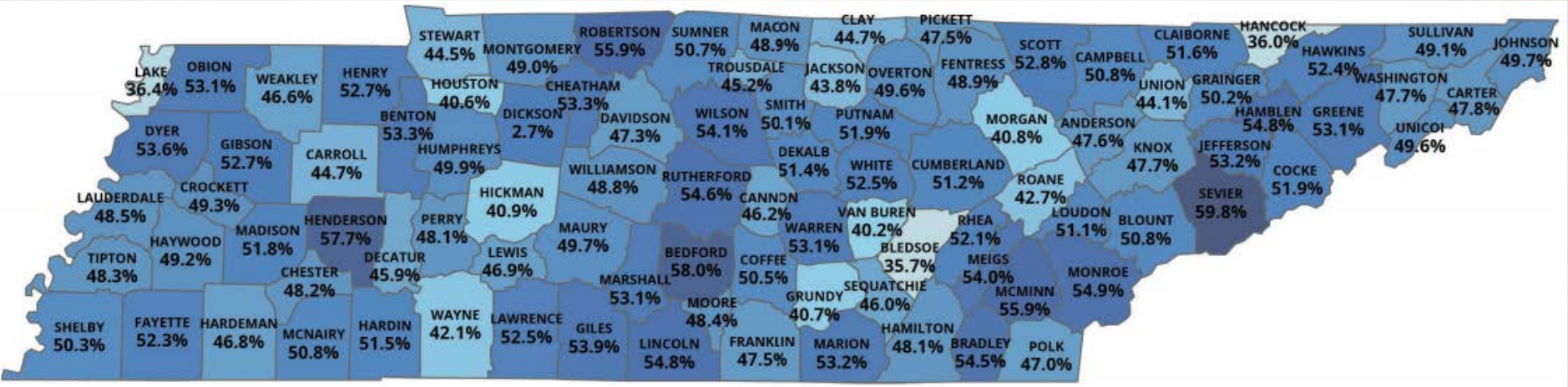
Occupations with High Demand

Computer systems analysts	Information security analysts	Computer Programmers
Network & computer systems administrators	Computer network architects	Computer user support specialists
Software developers	Web developers	Database administrators

Relevant Program	Tennessee				
	Completions (2016)	Openings (2017)	Median Wage	Jobs (2017)	Jobs (2027)
Computer & Information Sciences	686	4,432	\$37.39	41,532	52,378
Computer Science	475	4,779	\$31.95	45,442	55,649
Management Information Systems	216	1,011	\$39.72	10,298	11,922
Computer Engineering	123	2,272	\$39.97	21,085	26,693
Computer & Information Systems Security/Information Assurance	52	2,791	\$27.47	27,476	33,089
Computer Systems Networking & Telecommunications	107	2,991	\$27.38	28,167	34,845
Web Page, Digital/Multimedia & Information Resources Design	75	1,243	\$23.12	11,364	13,627
Network & System Administration	27	3,301	\$29.55	31,866	38,584
Computer Programming	36	3,822	\$29.70	36,275	44,512

TENNESSEE WORKFORCE DISRUPTION INDEX

% of Jobs Vulnerable to Automation, by County



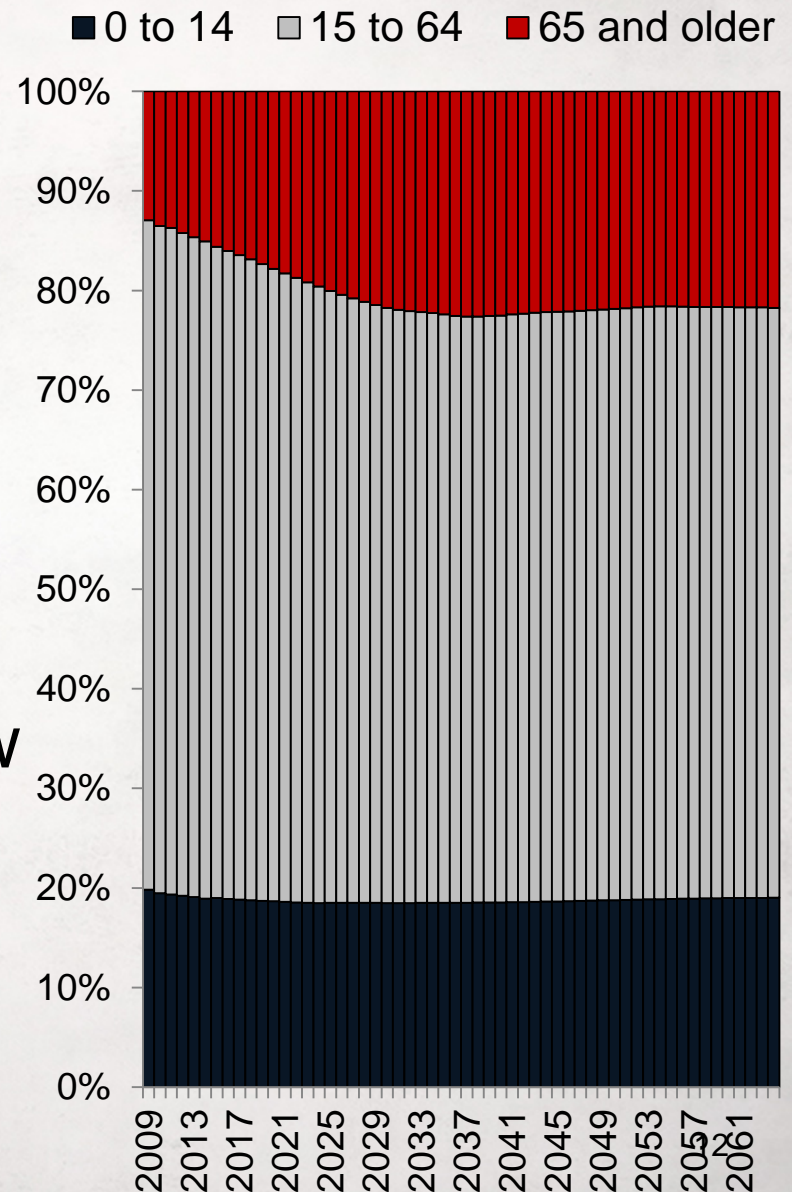
1.4 Million (50%) Tennessee jobs have a high probability of automation;
37% of wages

Occupation groups with greatest share of vulnerable jobs: 92% of TN jobs in food prep & serving are vulnerable to automation—as are 77% of sales jobs, 76% of production jobs, 73% of transportation/material moving jobs, and 66% of office/administrative support jobs in TN.

Avg. hourly wage of jobs with a high probability of automation (\$14.56) is five dollars lower than the average wage for all jobs.

SHIFTING AGE DEMOGRAPHICS

- Retirements of the baby boomer cohort is another disruptive trend many organizations face
- Population age 15-64 will decline from 67% to 59% by 2032
- Population age 65+ will grow from 13% to 22% by 2032



EDUCATIONAL ATTAINMENT

Automation will disrupt the workforce landscape – not replace it.

- Greater demand for critical thinking, judgment, human perception, creativity, social intelligence, interaction
- Technology can complement labor; and boost productivity, incomes, leisure time
- Education improves ability of a workforce to complement & align with automation



TENNESSEE
Promise

Tuition-free attendance at a community or technical college for 2 years. Opportunity available to high school seniors who apply.

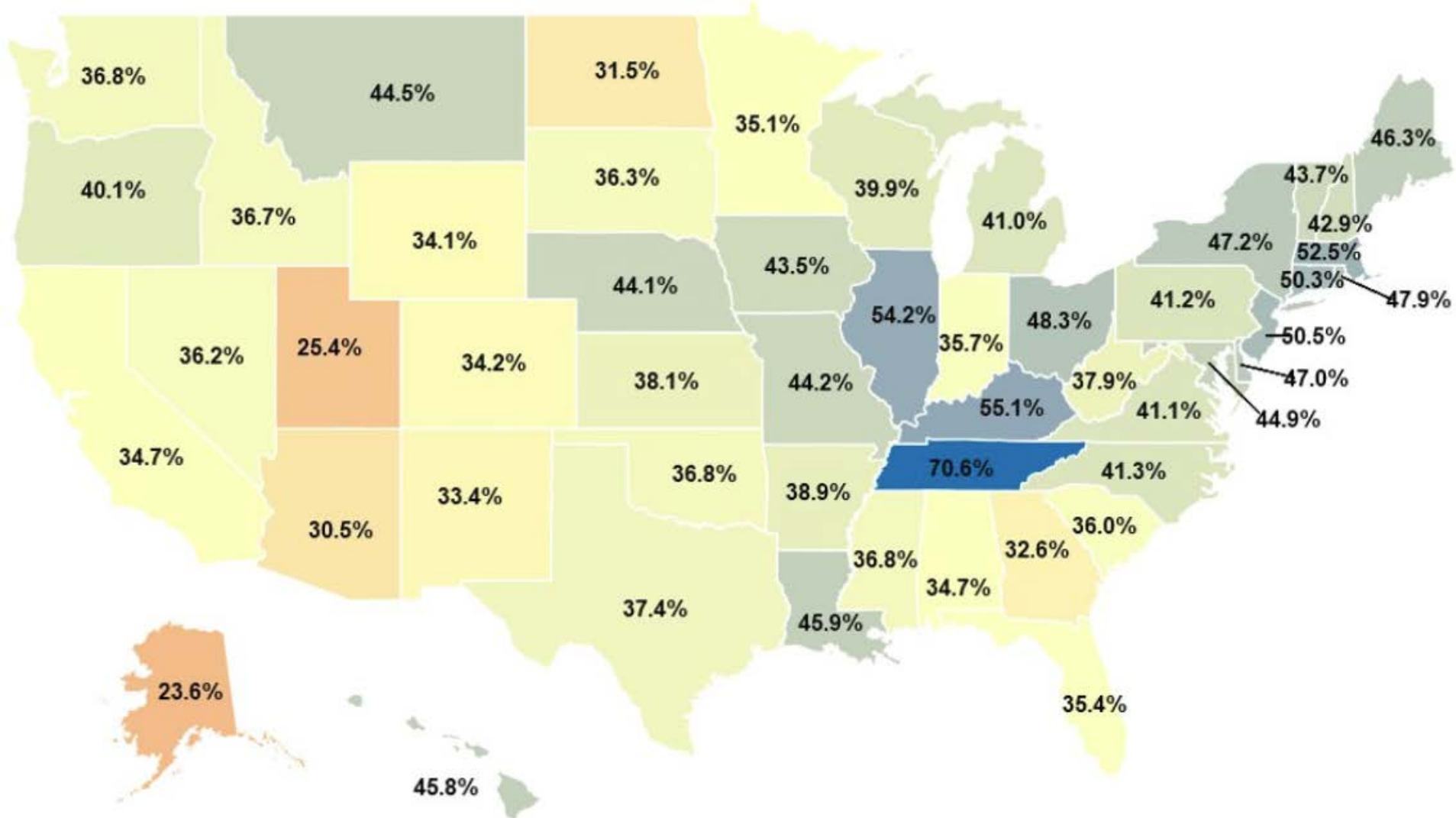


TENNESSEE
Reconnect

Tuition-free attendance at a community or technical college for adults who do not already have an associate or bachelor degree

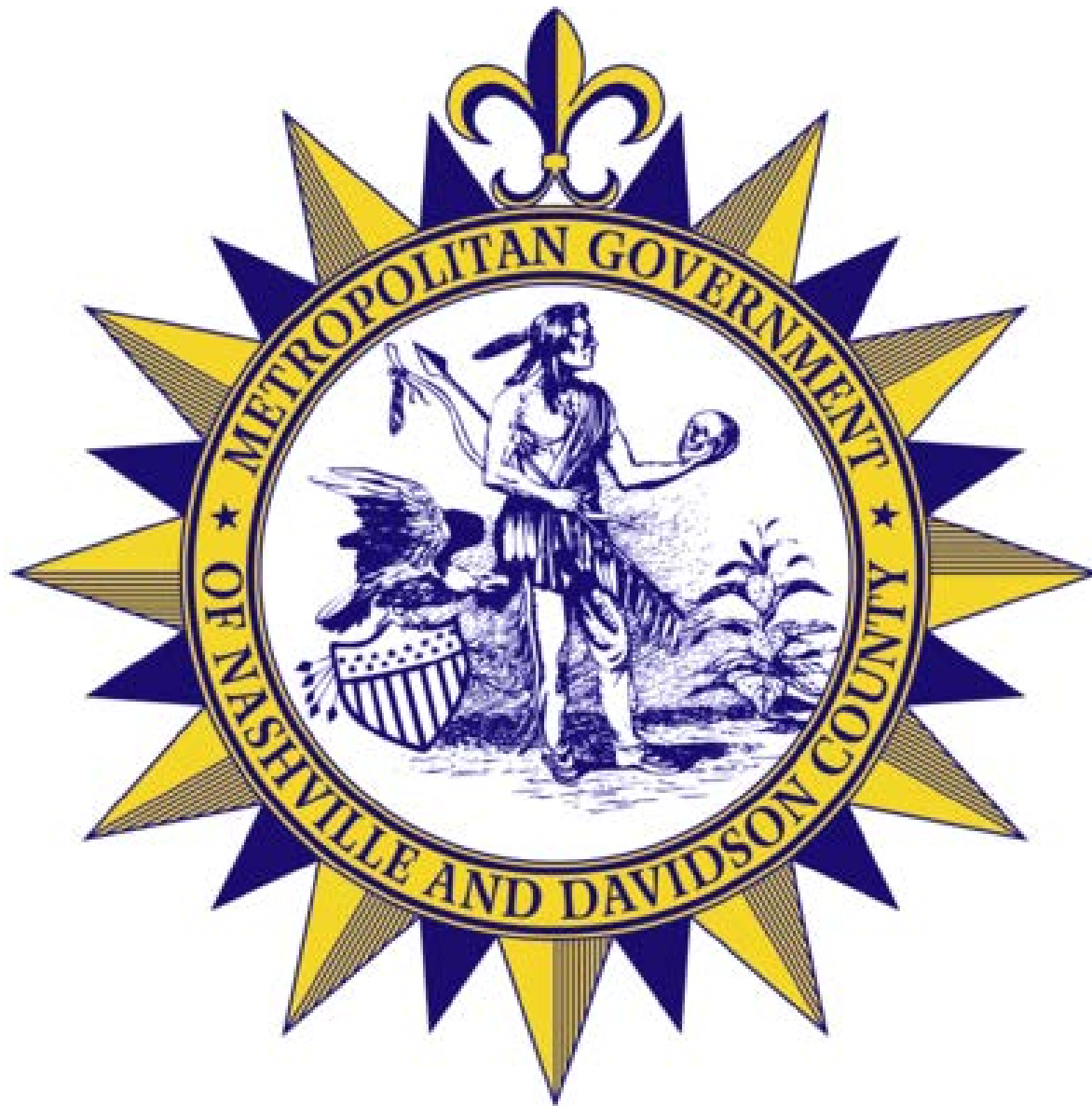
FAFSA COMPLETION RATES

(AS OF 2/2/18)



Thank you!

Sally Avery, Director
Center for Economic Research
in Tennessee (CERT)
615-979-6064
sally.avery@tn.gov





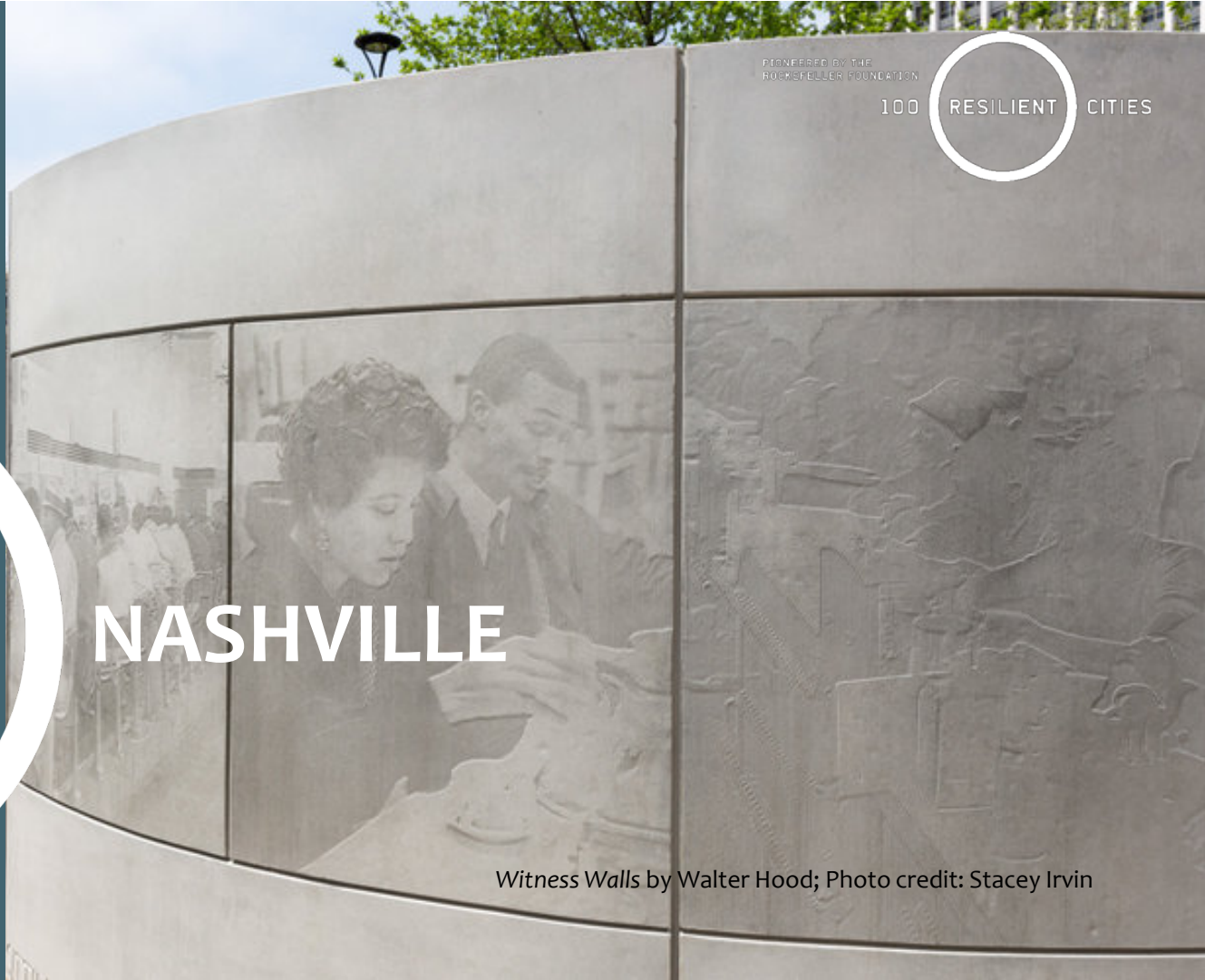
Presentations from the Office of the Mayor

- **Erik Cole**, Moderator
- **John Murphy** - Financial Inclusion
- **Erin Hafkenschiel** - Transit and Transportation
- **Julia Wcislo** - Talent Hub: Increasing Post-Secondary Completion in the Promise Zone



RESILIENT

NASHVILLE

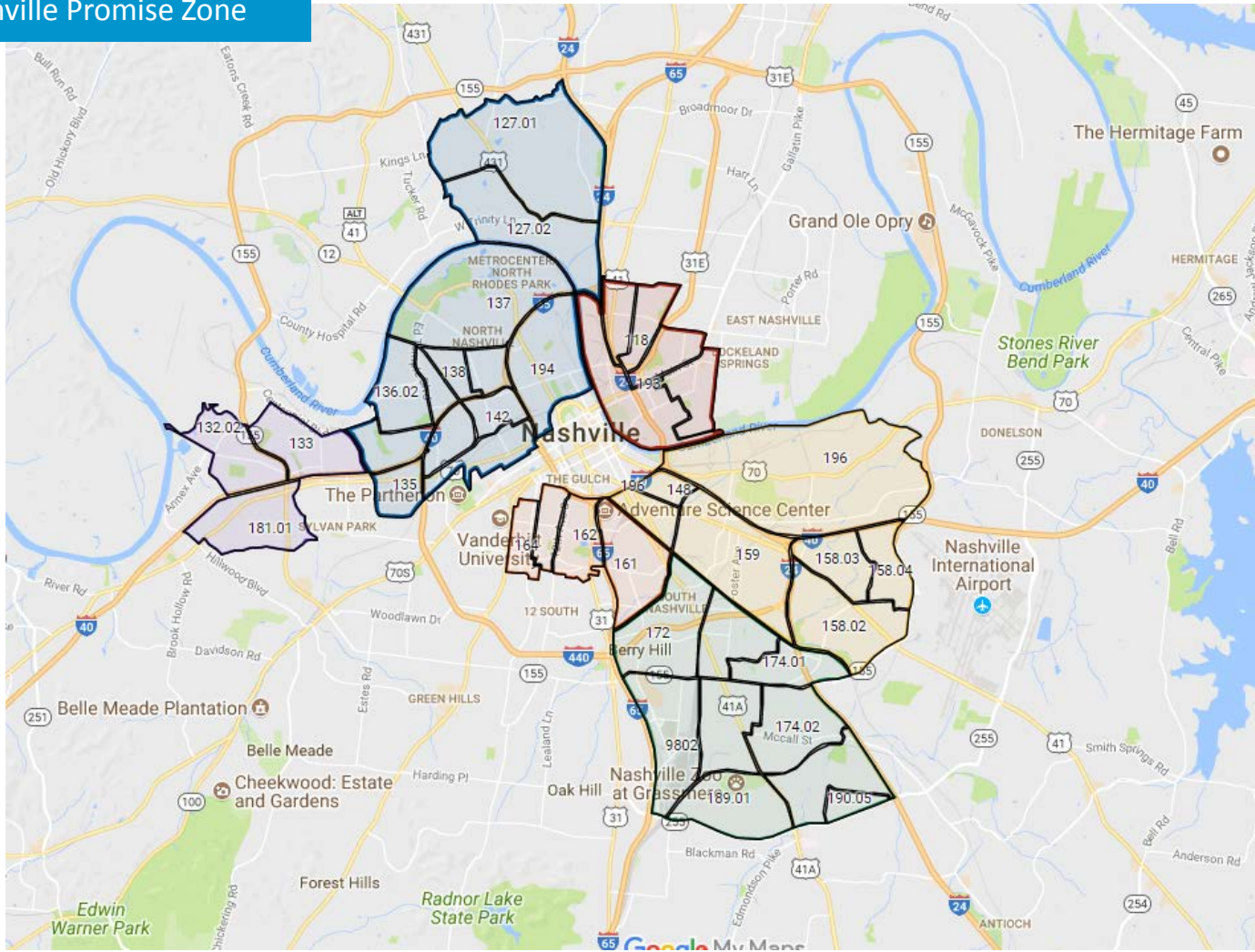


PIONEERED BY THE
ROCKEFELLER FOUNDATION

100 RESILIENT CITIES

Witness Walls by Walter Hood; Photo credit: Stacey Irvin

Nashville Promise Zone





URBAN RESILIENCE

Is the capacity of individuals, communities, institutions, businesses, and systems within a city to survive, adapt, and grow no matter what kinds of **chronic stresses** and **acute shocks** they experience. [Video](#)

Milan



Resilience Overview

A city's ability to maintain essential functions is threatened by both **acute shocks** and **chronic stresses**.



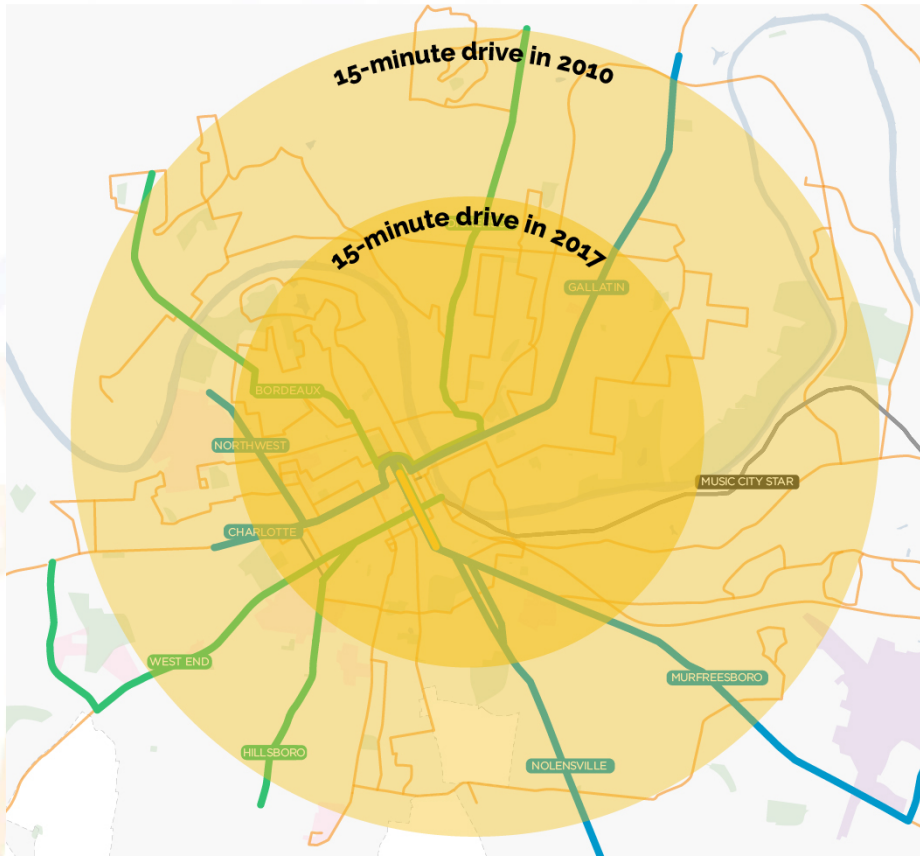
Flooding in Mandalay, Myanmar

Sudden **shocks** or accumulating **stresses** can lead to social breakdown, physical collapse, or economic decline.





Increasing commute times



111,000 additional commuters have been added to our roads since 2010



Improved Mobility

Roads Alone Won't Fix It....

We can't build our way out of the problem with more and bigger roads.





We need a solution that moves more people




Let's Move Nashville is Metro's solution to the existing transportation network's insufficiencies.



Economic Impact for all Nashvillians

Convenience



76%
Residents

89%
Jobs
with convenient
access to lines

LET'S MOVE
NASHVILLE
Metro's Transportation Solution

**Economic
Impact**



\$4.76BN
GDP Growth

\$3.66BN
Labor Income

LET'S MOVE
NASHVILLE
Metro's Transportation Solution

Jobs



3,850
Jobs
per year

LET'S MOVE
NASHVILLE
Metro's Transportation Solution

Transit improves affordability

WHO NEEDS TRANSIT?

Senior Citizens:

11%

of Davidson County Population

THINK TENNESSEE

WHO NEEDS TRANSIT?

Residents without
Vehicle Access:

3,100

Davidson County Households

THINK TENNESSEE

WHO NEEDS TRANSIT?

Single Parents:

39.5%

of Davidson County
Families with Kids

THINK TENNESSEE

WHO NEEDS TRANSIT?

Residents with a Disability:

11.6%

of Davidson County Population

THINK TENNESSEE



RESILIENT NASHVILLE

PIONEERED BY THE
ROCKEFELLER FOUNDATION



Mayor's Office of Resilience
resilient.nashville.gov

Erik Cole
Chief Resilience Officer
erik.cole@nashville.gov

[@erikecole](https://twitter.com/erikecole)

615-862-6026

Reflection by Laurence Argent; Photo credit: Stacey Irvin

