1. MEDICAL DISTRICT OVERVIEW

**MEMPHIS MEDICAL DISTRICT**

**DEMOGRAPHICS**
- Population: 9,500
- Population Density: 3,642 PSM
- Median Age: 39
- Race Breakdown:
  - White: 28%
  - Black: 64%
  - Asian: 1.6%
  - Other: 5.4%
- Median HH Income: $15,844
- Households below poverty line: 45%
- Educational Attainment:
  - Bachelors Degrees: 20%

**Housing**
- Owner-Occupied: 7.8%
- Renter-Occupied: 72.8%

*Source: University of Memphis Center for Partnership 403 & Federal Data*

**PARTICIPATING INSTITUTIONS**
- 8 institutions
- 16,000 employees
- 2,000 additional
- 8,000 students
- $2.7B collective operating budget
- 250+ acres of property

**PHASE 1 SUMMARY**
- Dominant land use within the district
  - Large lot sizes complicate human-scale development
- Major land use type across different uses
  - 710 Acres of Commercial and Institutional Parking within the District
  - $337 Million in current and planned Parking Investment
- Fractured and limited housing supply of inconsistent quality
  - Housing Concentrates within district edges but suffers from issues with vacancy, crime, and limited stock

*Images courtesy of University of Memphis Center for Partnership 403 & Federal Data*
LIMITED RETAIL AND DINING MARKET
MEDICAL USES DOMINATE COMMERCIAL LANDSCAPE

Density of Medical/Healthcare Businesses

Density of Food/Retail Businesses

High Supply of Medical related businesses within the District

Low supply of non-medical businesses relative to proximate neighborhoods

VISUAL LANDSCAPE

GATES  DRIVE-THRU  DISINVESTMENT  FENCES

AUTO-ORIENTED  AUTO-ORIENTED  AUTO-ORIENTED

EMPLOYEES/STUDENTS
LIVING / COMMUTE PATTERNS

2.7% Employees

(415)

6% Off-campus students

(250)

Live within the District

Breakdown by Institution

POTENTIAL

Why Is There Potential?
Recurring Employee/Student Demand Every Year

~2,500 (16%) Employees

~1,300 (30%) Students*

Are newly hired or enrolled at institutions annually
In addition, 5,000* hires and 1,000* students over next 5 years

Why Is There Potential?
Immense Untapped Demand Without Canibalizing Memphis

Spend in Memphis

$50M

$350M

Immense, untapped demand across many commodities leaks outside of the Medical District and Memphis
Institutions own approximately 110 acres of land that is either surface parking or vacant and could be leveraged for more productive uses.
PUBLIC SPACES
CLEAN AND GREEN PROGRAM

- 9 Full-Time Crew w/ Crew Manager
  - District ambassadors
  - Trash receptacle and litter pick-up
  - Water/weed plants
  - Graffiti removal
  - Wipe down signs and newsstands
  - Pressure wash sidewalks

PUBLIC SPACES
PUBLIC REALM STUDY

1. Identify Corridors
2. Long Term Plan (Streetscapes)
3. Incremental Steps
   - Planters
   - Seating
   - Trashcans
   - Gateway Signage

PUBLIC SPACES
STREETSCAPE IMPROVEMENT PLAYBOOK

SAFETY AND SECURITY
STRATEGY DEVELOPMENT - WEST PHILADELPHIA / UNIVERSITY CITY

- Police Coordination
  - Penn Police
  - Philly PD
  - Drexel Police
  - Private Security
  - Safety Ambassadors

- Shared Comprehensive Strategy
- Use of Technology
- 9 years as Top Ranked University Police
### LIVE LOCAL MEDICAL DISTRICT PROGRAM

#### APPLICATIONS

- **200 APPLICANTS**

#### APPLICATIONS by Incentive Type

- 80% RENTAL INCENTIVE
- 17% PURCHASE INCENTIVE
- 3% IMPROVEMENT INCENTIVE

#### APPLICATIONS by Institution

- Applications by Incentive Type

#### LIVE LOCAL MEDICAL DISTRICT PROGRAM

#### APPLICATION STATUS

- **200 APPLICANTS**

#### Application Status

- Analysis of Attrition/Withdrawn/Declined
- Primary Decline Reasons:
  1. Property Eligibility
  2. HR Eligibility
  3. Time Limitation

#### Operation Opportunity Challenge

- Kick Off Celebration

#### Hire Local

#### Framework

- Inputs
- Activity
- Outputs

#### Community Benefits

- Directly Support the Local Economy
- Employer Benefits

#### Occupation Name

- Environmental Services/Custodial/Laundry
- Food Service
- Mechanics/Maintenance
- Nursing/Medical Assistants
- Technicians
- Technologists
- Respiratory Therapists
- Registered Nurses
- HIM and Records Technicians
- Administrative Assistants
- IT (Analysts, Support, Admin, Development)
- Research Associates/Research Technicians

#### Occupation Category

- Facilities Support
- Facilities Support
- Facilities Support
- Allied Health
- Allied Health
- Allied Health
- Allied Health
- Nursing
- Healthcare Admin
- Healthcare Admin
- Healthcare Admin

#### Occupation for Analysis Selected

- Based on:
  - Collective Demand: Multiple institutions have the same high need
  - Consistent Turnover: Turnover, aging, or new demand are consistent
  - Supply Pipeline: Connections to local workforce, education and other training programs in Memphis
  - Return on Investment: Forthcoming – These will be further honed once we determine which occupations offer the best return on program investment.

#### BUY LOCAL

2016 by the Numbers

- 7 MEETINGS
- 115 COLLECTIVE HOURS WORKED FROM PURCHASERS
- 80 LOCAL AND MINORITY/WOMEN-OWNED BUSINESSES INTRODUCED
- 80 ATTEND OPERATION OPPORTUNITY KICK OFF
- 11 OFFICIAL ENTRIES INTO THE COMPETITION
- 12 MEMBERS OF THE PURCHASING COUNCIL
- $700k CONFIRMED NEW REVENUE OR POTENTIAL IN PROCESS
- 8 OUT OF 8 SUPPLIERS FOUND THE GROUP VERY VALUABLE AND WILL CONTINUE PARTICIPATION IN 2017

#### Supply Constraints

- We learned that 120 Days is not enough time to find available properties.
- Available properties require too much renovation to compete with supply outside district.
- Even if additional funding is provided, there is not enough supply.
HIRE LOCAL
UPDATE DEMAND ANALYSIS

<-------- Hiring Dashboards created for all major positions and for each individual institution. Dashboards track volume of positions, turnover/aging trends, educational/skill requirements, and projected demand of each position.

Reviews and discussions of individual findings scheduled/completed:
  - Methodist/LeBonheur
  - St Jude
  - Regional One
  - UTHSC
  - ALSAC (in progress)
  - SWITCC
  - SCO/Baptist (in progress)

ANALYZING COLLECTIVE DATA

CATEGORY: OCCUPATION TRENDS

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>POSITION</th>
<th>CURRENT</th>
<th>YEAR</th>
<th>DEMAND</th>
<th>OVERALL COLLECTIVE DEMAND</th>
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<tbody>
<tr>
<td>Healthcare administrative</td>
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<td>60</td>
<td>Medical Assistant</td>
<td>130</td>
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<td>Respiratory Therapist</td>
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<td>Surgical Technologist</td>
<td>80</td>
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<td></td>
<td>Pharmacy Technician</td>
<td>60</td>
<td>Phlebotomy Technician</td>
<td>60</td>
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<td>IT Analysts</td>
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<td>Radiologic/MRI Technologist</td>
<td>55</td>
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<tr>
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<td>Social Worker</td>
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<td>RN</td>
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SUPPLY: PEOPLE

DEMOGRAPHIC SUMMARY

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<tbody>
<tr>
<td>Educational Attainment</td>
<td>Bachelor's Degree</td>
<td>46%</td>
<td>28%</td>
<td>12%</td>
<td>100%</td>
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<tr>
<td>Educational Attainment</td>
<td>PhD/CMPH</td>
<td>7%</td>
<td>4%</td>
<td>0%</td>
<td>100%</td>
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<tr>
<td>Educational Attainment</td>
<td>Some College/AS</td>
<td>10%</td>
<td>8%</td>
<td>2%</td>
<td>100%</td>
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<tr>
<td>Educational Attainment</td>
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<td>20%</td>
<td>16%</td>
<td>4%</td>
<td>100%</td>
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<tr>
<td>Educational Attainment</td>
<td>Less Than HS</td>
<td>21%</td>
<td>20%</td>
<td>1%</td>
<td>100%</td>
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<tr>
<td>Household Income</td>
<td>&lt;$18,500</td>
<td>51%</td>
<td>27%</td>
<td>3%</td>
<td>100%</td>
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<tr>
<td>Household Income</td>
<td>$18,500-$20,250</td>
<td>8%</td>
<td>12%</td>
<td>7%</td>
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<td>$20,250-$30,000</td>
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<td>100%</td>
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<tr>
<td>Household Income</td>
<td>$30,000-$40,000</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>100%</td>
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**RESIDENTIAL MARKET ANALYSIS**

<table>
<thead>
<tr>
<th>Market Area</th>
<th>Units</th>
<th>% of Total</th>
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<tbody>
<tr>
<td>Uptown</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Midtown</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Downtown</td>
<td></td>
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**RFP PROJECTS**

- **UT-RFP Site**
- **SCO-RFP**

**CYCLE SHOP UPDATE**

**COMMUNITY REDEVELOPMENT AGENCY**

**UPTOWN REDEVELOPMENT AREA**

- Diversion of $100 million in property tax dollars into neighborhood improvement fund since 2000 have resulted in CRA-funded developments including but not limited to:
  - 846 Apartments and Houses
  - 83 Rehabilations
  - 63 Senior Apartments
  - 21,400 Linear feet sidewalk
  - 8,400 Linear feet alaways
  - 1,600 Linear feet streets
  - 1,500 Trees

As of today there is $75 Million TIF funds available in $5 Million yearly increments


**COMMUNITY REDEVELOPMENT AGENCY**

**PROPOSED TIF EXPANSION**

**Phases To Establish or Amend the TIF District under CRA:**

1. Identify the redevelopers area in the CRA Workable Program.
2. Adopt a finding of slum, blight, or lack of affordable housing and a finding that the rehabilitation, conservation, or redevelopment of the area is "necessary in the interest of the public health, safety, morals, or welfare."
3. Adopt a community redevelopers plan in accordance with the terms of the Act.
4. Establish a redevelopers trust fund.

**EMERGING DEVELOPERS WORKSHOPS**

- Move Quickly – Small scale developers can move faster than larger scale developers in neighborhoods: cottage courts, live-work buildings, 4-plex, etc.
- Fill Gaps – 30,000 vacant lots and buildings. This is a tool that helps fill isolated opportunities between and around other projects.
- Build Wealth – Becomes a wealth building tool for trades, school teachers, others.