A background image showing a blurred financial data screen with green numbers and currency codes like USD and EUR.

# FOCUS

A ROADMAP FOR  
TRANSFORMING  
THE METRO  
MEMPHIS ECONOMY

EXECUTIVE SUMMARY

A background image showing a worker in a white lab coat and gloves working on a piece of machinery, with a blue tint.

METROPOLITAN BUSINESS PLAN

## FOCUS: A ROADMAP FOR TRANSFORMING THE METRO MEMPHIS ECONOMY

A METROPOLITAN BUSINESS PLAN  
PREPARED IN COLLABORATION WITH  
THE BROOKINGS INSTITUTION METROPOLITAN POLICY PROGRAM

OCTOBER 2014

### MEMPHIS & SHELBY COUNTY REGIONAL ECONOMIC DEVELOPMENT PLAN STEERING COMMITTEE

#### Co-Chairs

**Christine P. Richards**

FedEx Executive VP  
General Counsel &  
Secretary

**Mark H. Luttrell, Jr.**

Mayor of Shelby County

**A C Wharton, Jr.**

Mayor of the City of Memphis

#### Committee Members

**Darrell Cobbins**

President, Universal  
Commercial Real Estate

**Edward Dobbs**

CEO, Dobbs Management  
Services

**Nathan Essex**

President, Southwest  
Tennessee Community  
College

**Dr. William Evans**

Director & CEO, St. Jude  
Children's Research Hospital

**Robert Fockler**

CEO, Community Foundation  
of Greater Memphis

**Carolyn Hardy**

President, Chism Hardy  
Enterprises

**Montgomery Martin**

President, Montgomery  
Martin Contractors

**Dr. M. David Rudd**

President,  
University of Memphis

**Gary Shorb**

CEO, Methodist LeBonheur  
Healthcare

**Derwin Sisnett**

CEO, Gestalt Community  
Schools

**Blair Taylor**

Memphis Fast Forward Liaison

**Floyd Tyler**

President, Preserver Partners

#### Project Management and Financial Support

EDGE-Economic Development  
Growth Engine for Memphis &  
Shelby County

Reid Dulberger,  
Chief Economic Development  
Officer for Memphis & Shelby  
County

John Lawrence,  
Manager of Strategic  
Economic Development  
Planning

#### Contract Assistance

Chris Przybyszewski  
RocketFuel  
Southern Growth Studios

#### Strategic Partners

Memphis Fast Forward  
Initiatives  
Memphis & Shelby County  
Growth Alliance  
PeopleFirst Partnership

The University of Memphis  
Dr. Charles Santo, Director,  
Graduate Program in City &  
Regional Planning  
Kevin Boggs, Assistant Vice  
President Tech Transfer

#### For More Information

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## A MESSAGE FROM THE CO-CHAIRS

Leaders from Memphis and Shelby County have come together to envision a new framework for growth that builds on our region's assets and heritage while catalyzing new strengths and advantages for the 21st century.

**Focus: A Roadmap for Transforming the Metro Memphis Economy** represents a major milestone for Metro Memphis, the result of a profound conviction that communities across the region share a common economic destiny. Our long-term success depends on the choices that we make both now and moving forward. Strategically aligning our regional agenda around transformation to a competitive 21st century economy represents the first move.

For more than two years, leaders from across the public and private sectors have worked to assess the strengths and weaknesses of the Metro Memphis regional economy—its trajectory, challenges, and opportunities. Working in partnership with The Brookings Institution Metropolitan Policy Program and RW Ventures of Chicago, we engaged more than 150 leaders from business, government, universities, and nonprofits to develop this roadmap for change.

We recognize that we live in a world where metropolitan regions—not individual cities—are the engines of economic growth. We know that what benefits Germantown also benefits Collierville, and what improves Bartlett will be a boon to Arlington. We understand that knitting the interests of the region into a shared vision is necessary in order for the region to prosper.

Metro Memphis has a lot to build on—global logistics and multi-modal transportation assets that, while maturing as a sector, continue to offer an unparalleled platform for growth as an advantage and magnet for

firms that depend on rapid turnaround and just-in-time delivery.

We intend for **Focus: A Roadmap for Transforming the Metro Memphis Economy** to represent only the first step in ongoing work anchoring planning in rigorous analysis of our assets, understanding the market dynamics that shape our economy, and designing strategies that will improve our economic performance. We are confident that this long-term course will generate greater opportunity for more of our people and communities.

When the region unites behind a singular vision for growth, it will gather the momentum, resources, and talent required to move it forward. Such progress will require leadership and steadfast commitment from all of us working together. We invite you to join with us in carrying out this ambitious agenda.

Christine P. Richards, *FedEx Executive Vice President, General Counsel and Secretary*

Mark H. Luttrell, Jr., *Mayor, Shelby County*

A C Wharton, Jr., *Mayor, City of Memphis*





## INTRODUCTION

From its historic beginnings, when cotton was king, Metro Memphis has emerged as a global center for transportation and logistics, moving billions of dollars in goods through the region on planes, trains, barges, and trucks.



**“Metro Memphis possesses considerable assets and strengths from which to build. The new global economy requires adaptation and a new model of working together—and it requires focus.”**

The region's standing as the home of FedEx World Headquarters fueled growth through an extensive network of firms and supply chains, making Metro Memphis one of the most highly specialized logistics-driven economies in the United States.

As the airfreight industry matures and the global economy shifts increasingly toward competition based on knowledge and innovation, Metro Memphis must define a new course to stimulate new growth opportunities and build new areas of strength in this next economy.

The region confronts three critical challenges as it sets this new course: the need to shift toward more advanced production sectors; the need to build the skills required for higher-quality jobs; and the need to generate greater opportunity for residents throughout the region.

With economic output that the Bureau of Economic Analysis totaled at \$66.8 billion in 2012, a population of 1.3 million, and a job base that reached 610,000 in 2013, Metro Memphis underpins the economic health of the entire Mid-South. It encompasses eight counties, with Shelby County at its center, and is the 41st largest metropolitan area and the 46th largest economy in the United States.

The need to change course is compelling: Metro Memphis ranks in the bottom half of the nation's large metropolitan regions on most measures of economic performance and continues to struggle in its recovery from the Great Recession.

Today, it trails behind the nation in economic output growth as well as in productivity and wages. The region's job base remains 3 percent lower than at the beginning of the last decade, and median household



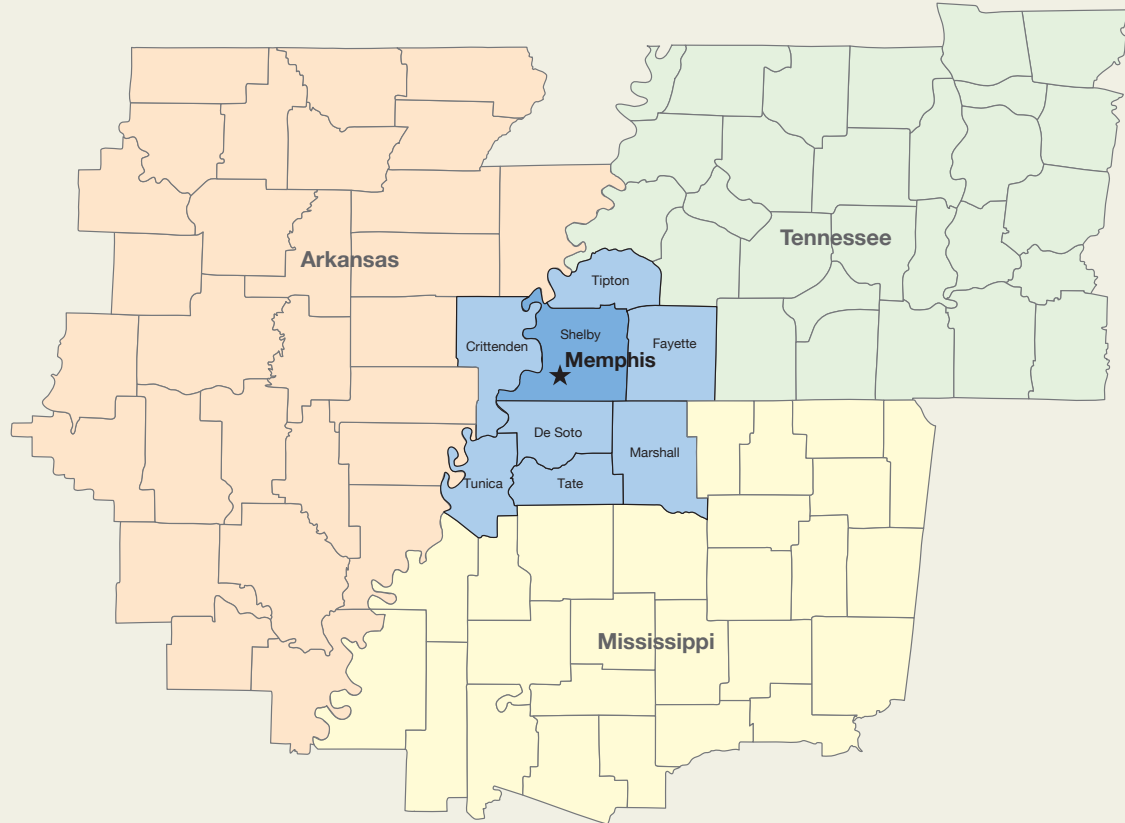
income declined 16 percent over the same period—5 percentage points more than the comparable national decline. The region had the 10th highest poverty rate among metropolitan regions in the country, at 19.9 percent in 2012.

These trends impact individuals, families, and communities, as well as the region as a whole. To address them, FedEx Executive Vice President Christine P. Richards; Shelby County Mayor Mark H. Luttrell, Jr.; and Memphis Mayor A C Wharton, Jr. convened leaders from the region's public, private, and civic sectors to develop a pragmatic plan to foster a more sustainable and inclusive economy.

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## GREATER MEMPHIS METROPOLITAN REGION



Based on rigorous market analysis, ***Focus: A Roadmap for Transforming the Metro Memphis Economy*** advances seven strategies for navigating changes underway in the global economy. Its vision calls for the Metro Memphis region to emerge as a “global leader in the development, production, and distribution of high-value goods and services, a model of broad-based cooperation and inclusive growth.” It sets four aspirational goals:

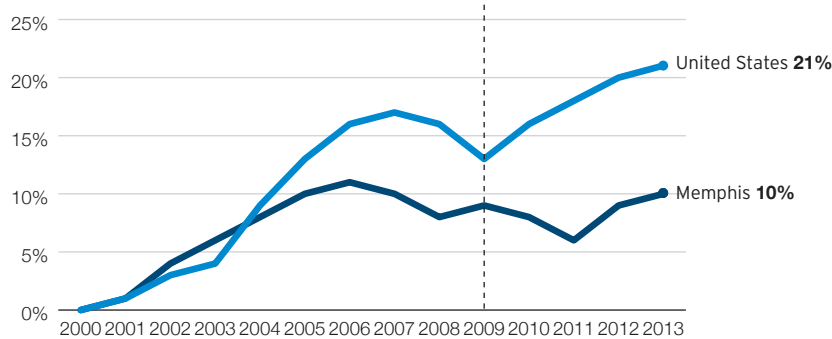
- Solidify the Metro Memphis region as the preeminent center for multi-modal movement of goods, specializing in solutions for high-value, just-in-time products.
- Establish the region as a hub for innovation, production, and exports in targeted sectors, including notably strong areas such as diagnostic services and medical devices.

- Create opportunity by improving workforce skills and access to career jobs, benefiting both businesses and residents throughout the region.
- Become a model for regional collaboration, building ongoing capacity for leaders to assess the region’s standing in the global marketplace and shape continuing strategic development and implementation.

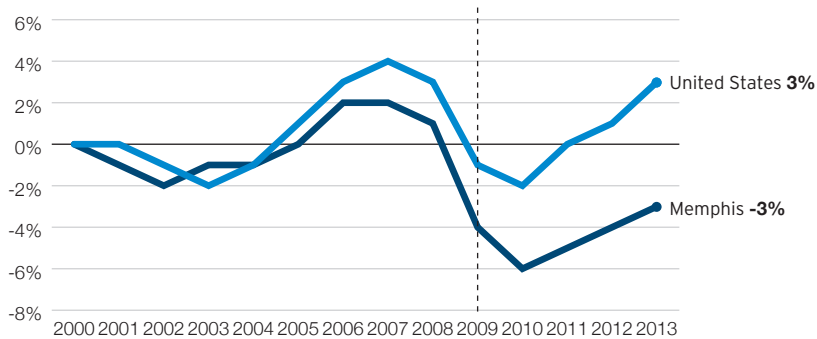
Metro Memphis possesses considerable assets and strengths from which to build. The new global economy requires adaptation and a new model of working together—and it requires focus. ■

# THE GREATER MEMPHIS REGION LAGS THE NATION IN CRITICAL INDICATORS OF ECONOMIC PERFORMANCE

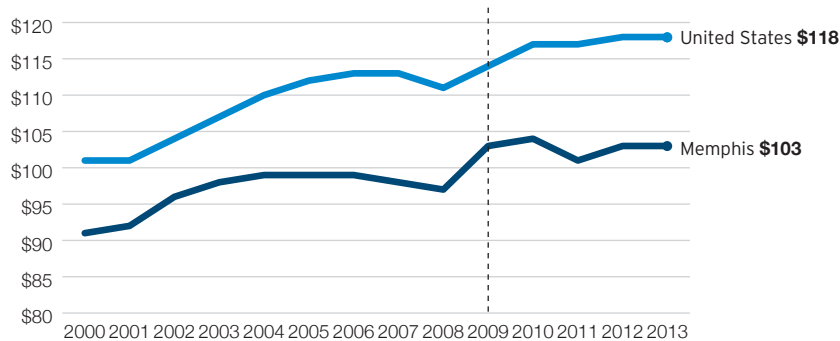
## 1. CHANGE IN ECONOMIC OUTPUT, 2000 TO 2013 compared to national average



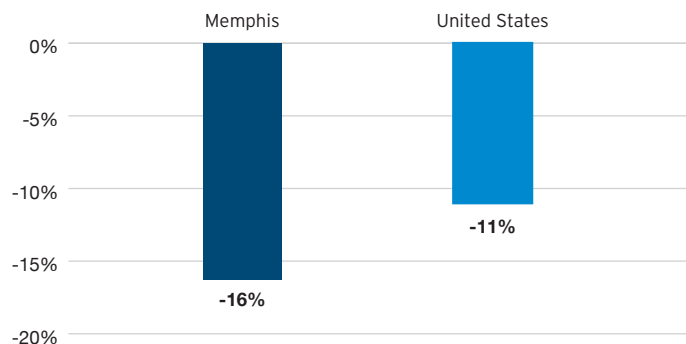
## 2. CHANGE IN EMPLOYMENT, 2000 TO 2013 compared to national average



## 3. CHANGE IN OUTPUT PER WORKER, 2000 TO 2013 (IN \$1,000s) compared to national average



## 4. CHANGE IN MEDIAN HOUSEHOLD INCOME, 1999 TO 2012 compared to national average



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## THE NEXT ECONOMY

To gain a foothold in the new economy, the Metro Memphis region must embrace the fundamental transformation underway in the global economy—where knowledge assets centered on people and technology concentrate and drive higher productivity in metropolitan areas.

The acceleration of technology, innovation, and globalization are changing the dynamics of productivity and economic growth. Market dynamics are more fluid and geared to reward continuous innovation in products, production techniques, and business models.

The global economy also is evolving rapidly toward even greater integration, with goods, services, talent, capital, and supplier relationships seamlessly crossing national boundaries. And metropolitan regions have emerged as the vital hubs for these activities, the engines of the new economy.

This more dynamic environment demands a new approach to economic development: one that is anchored in a deep understanding of the region's market strengths and weaknesses and focused on

carefully calibrated strategies designed to leverage those strengths and foster a culture of collaboration between public and private sector institutions and leaders.

Additionally, all areas within a region—its neighborhoods and its populations—are inextricably linked. Regions that develop and deploy more of their human, land, and business assets perform better in the long run because they waste fewer resources and escape the social burden of concentrated poverty.

Regions with the greatest capacity to understand this confluence of forces, think strategically, act globally, and build on their assets will forge ahead in this new environment. Those that do not will fall further behind. ■





## MARKET ASSESSMENT

For more than three decades, Metro Memphis' strength as a global hub for logistics and transportation defined and drove its economy, but the region can no longer rely on it to be the dominant engine of growth it has been in the past.

The mandate for Metro Memphis is to solidify its standing as a global hub for the movement and distribution of goods while also diversifying its economy to fuel new growth opportunities and create better jobs.

**Focus: A Roadmap for Transforming the Metro Memphis Economy** is designed to navigate that transition. Grounded in analysis of the region's assets

and challenges, it draws on the insights of partners and stakeholders from across the region and builds on significant work already underway to strengthen the region's economic clusters, educational attainment, entrepreneurial culture, and innovation capacities. The full market assessment can be found at [www.metromemphisplan.com](http://www.metromemphisplan.com). ■

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## KEY FINDINGS

**1 THE REGION MUST DIVERSIFY ITS ECONOMY BY BUILDING UP SPECIALIZATIONS IN SECTORS THAT LEVERAGE ITS GLOBAL LOGISTICS HUB, INCLUDING BIOTECHNOLOGY, BIOLOGISTICS, MEDICAL DEVICES, AND DIAGNOSTICS.**

The FedEx corporate headquarters and its multiple operating companies anchor the region's most dominant cluster. Transportation, distribution and logistics account for 127,000 jobs—one out of every five in the region and nearly four times the average concentration of those jobs in other U.S. regions.

With five Class 1 railroads, the nation's fourth largest inland river port, and the convergence of multiple highway systems, Metro Memphis' advantages in transportation are multi-modal.

Logistics and transportation reach into virtually every corner of the economy. They generate more than one-quarter of the region's total economic output and draw firms and sectors to the region that find competitive advantage in high-efficiency distribution, rapid turnaround, and world-class logistics support.

Employment in the core logistics sectors—transportation and warehousing—has plateaued, however, declining during the recession and then returning to slightly more than 60,000 last year.

At the same time, the rest of the Metro Memphis economy has shifted toward services and sectors that are primarily focused on local markets. Manufacturing, which accounted for 23 percent of employment in 1980, fell to 9 percent by the end of the last decade.

Lower-skilled (and often temporary or part-time) jobs related to distribution and logistics—along with retail, hospitality, and healthcare—have increasingly shaped the region’s employment profile. A recent occupational analysis found that more than two-thirds of jobs in Metro Memphis—67.8 percent—are in occupational categories that pay below the average wage.

Changing that profile will require deliberate steps to build up the region’s comparatively small but notable assets in new sectors, including biotechnology and biologistics, medical devices, diagnostics and personalized medicine, and emerging agricultural products and innovation.

Since 1980, employment in medical technologies production has expanded fourfold, from 2,000 jobs to almost 8,000, representing a growing regional specialization. Medical device manufacturing, equipment and supplies, and research and development related to medicine and life sciences, as well as diagnostic laboratories, have tripled their presence in the region, far outpacing national growth rates for those sectors.

Anchored by St. Jude Children’s Research Hospital and firms such as Smith & Nephew, Medtronic, and Wright Medical, this fast-growing cluster represents a mix of international companies with strategic divisions in the region, high-growth companies headquartered in Metro Memphis, startups, and smaller specialized firms. Together, these firms and organizations position Metro Memphis as a player with growth potential in these advanced industries.

All of these industries represent traded sectors—those that build wealth and opportunity by pulling



resources into the region from across the country and around the world. The region’s recent success in attracting new manufacturing related to electric power transmission, home appliances, and food processing also expands its position in traded sectors. Business-to-business services offer other potential avenues for growth.

Metro Memphis has seen relatively rapid expansion in the value of its exports and its number of export-related jobs but retains substantial growth potential. Top exporting sectors include some of the region’s strongest advanced industries, such as medical equipment and supplies, as well as legacy sectors like paper products, HVAC equipment, commodities, and agricultural products.

**“Metro Memphis has seen relatively rapid expansion in the value of its exports and its number of export-related jobs but retains substantial growth potential.”**





## **② PERSISTENTLY LOW LEVELS OF EDUCATIONAL ATTAINMENT POSE A FORMIDABLE BARRIER TO THE REGIONAL ECONOMY'S POTENTIAL TO GROW AND DIVERSIFY.**

Metro Memphis confronts an urgent challenge to improve the skills of its workforce. The region substantially trails national averages in educational attainment at the same time that it suffers from a shortage of skilled labor and workers struggle to find their footing in a new economy.

These realities undermine the ability of the region's industries to innovate and expand while limiting many area workers to low-skill, low-wage positions.

A 2012 study by The Brookings Institution found that nearly 40 percent of jobs in Metro Memphis required a bachelor's degree or higher education, but only 26 percent of adults in the region over age 25 possess that level of education. Another one-third of available jobs required some postsecondary training or an associate degree.

In other words, nearly three-quarters of jobs in the region required some form of education or training beyond high school, but only about 60 percent of the region's adult population meets that criterion. Nearly 29 percent hold only a high school diploma or

equivalent, while close to 14 percent have not earned even that basic credential.

Twenty-six percent of Metro Memphis residents hold a bachelor's degree or higher, compared to 30 percent or more in other major metropolitan areas. Another 7 percent hold an associate degree, while more than 200,000 residents have some college credits but no degree.

The gap in educational attainment between the region's white and black populations is significant. Only 17 percent of black adults have earned a bachelor's degree or higher, slightly less than half the attainment rate among whites. Reducing these disparities represents a critical imperative for the region.

Many partners and institutions are focused on raising educational attainment. Key initiatives include Memphis Fast Forward's PeopleFirst Partnership, Leadership Memphis' Memphis Talent Dividend, and the City of Memphis Office of Talent and Human Capital.

The state's "Tennessee Promise" initiative will expand access to community college and training by ensuring full scholarships to every student enrolled. The state also is offering some new funding to help its regions better align worker training with employers' needs and skill requirements.

### **③ THE REGION MUST ENHANCE AND BETTER COORDINATE ITS EFFORTS TO NURTURE INNOVATION AND SUPPORT ENTREPRENEURS AND STARTUPS.**

Metro Memphis is home to world-class research assets, including St. Jude Children's Research Hospital, and is growing capacity at the University of Memphis. It also boasts notable firms involved in research and development (R&D) for medical devices, musculoskeletal therapies, and orthopedics, as well as smaller firms conducting groundbreaking work in related industries.

In overall size and scale, however, the region's innovation capacity is smaller than in other large metropolitan regions, and its research institutions and leading business sectors could be better aligned.

Memphis Bioworks Foundation has pioneered a successful model for investment and strategic partnership with industry to pursue emerging opportunities in its target sectors. It fosters and invests in the exploration of opportunities in bio-devices and diagnostics, as well as agricultural innovation in areas such as petroleum substitutes, plastics, and polymers.

With respect to entrepreneurship, the region's growing network of incubators and accelerators screened more than 300 startups in 2012, provided

6,800 mentor hours, and worked with 30 new companies. But several key partners have undertaken a broad initiative to expand the network's reach and increase the overall impact. The Greater Memphis Chamber of Commerce, Memphis Bioworks Foundation, Start Co., and Emerge Memphis have formed the EPIcenter (Memphis Entrepreneurship Powered Innovation Center) and established a goal to support 1,000 entrepreneurs and launch 500 firms over the next 10 years.

### **④ THE DOMINANT DEVELOPMENT PATTERN IN METRO MEMPHIS HINDERS INNOVATION AND ACCESS TO OPPORTUNITY.**

In its current form, Metro Memphis is better designed to move products than to move people, and to foster outward growth and development rather than nurture the proximity and connectivity that is the hallmark of the innovation economy.

Employment patterns in the region are highly decentralized, with only about one-quarter of jobs concentrated in identifiable employment centers. While 81 percent of regional jobs are located in Shelby County, two-thirds of job growth in the last decade has occurred in surrounding counties.

As a result of both outmigration and annexation, residential density in the city of Memphis has declined substantially: from 7,780 people per square mile in 1950 to 1,915 most recently. This pattern of dispersion, coupled with the region's limited public transportation system, has left large areas—particularly urban communities within the city—without ready access to jobs in suburbs and surrounding counties.

This trend also undermines the opportunity to attract firms and talent back to the city, taking advantage of the wave of market interest—and current economic development trends—favoring locations in more densely populated urban areas.

Tax advantages and aggressive incentive packages in northern Mississippi have accelerated the outward growth pattern, luring firms to relocate within the region and increasing both segregation and disinvestment in older areas. ■



#### **INNOVATION AND ENTREPRENEURIAL NETWORK**

A growing network of organizations in Metro Memphis supports innovation and entrepreneurs, including:

- Emerge Memphis
- Memphis Bioworks Foundation
- Memphis Research Consortium
- The MMBC Continuum
- Start Co.
- The University of Memphis FedEx Institute of Technology & Crews Venture Labs
- The University of Tennessee Research Foundation

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## STRATEGIES FOR TRANSFORMING THE METRO MEMPHIS ECONOMY

In response to these challenges and opportunities, ***Focus: A Roadmap for Transforming the Metro Memphis Economy*** calls upon partners throughout the region to pursue a new course and implement seven strategies that will build synergy and momentum toward a regional next economy.



#### **STRATEGY 1:**

##### **Secure the Global Logistics Brand**

Metro Memphis will solidify its position as a leader in global logistics by building on its core strengths and extensive air, rail, and river connections.

#### **STRATEGY 2:**

##### **Diversify the Economy Beyond Logistics**

At the same time, Metro Memphis will leverage its strengths in logistics to diversify the regional economy, targeting those sectors in which it has a foothold to stimulate production of higher-value products that gain competitive advantage from rapid turnaround and delivery.

#### **STRATEGY 3:**

##### **Focus on Exports and International Trade**

Given the region's strong infrastructure for international trade, a new focus on growing exports represents a growth opportunity for the region and for firms of all sizes.

#### **STRATEGY 4:**

##### **Build a Next Economy Workforce**

Growth in the next economy will require higher-level skills and the creation of a more effective opportunity pipeline, tailored to new growth sectors and driven by employers to secure better jobs and opportunities for more workers.

#### **STRATEGY 5:**

##### **Organize for Innovation and Entrepreneurial Growth**

Better coordination will enhance the burgeoning system of support for entrepreneurs in Metro Memphis and strengthen the region's capacity for innovation.

#### **STRATEGY 6:**

##### **Create New Approaches to Development Designed for the New Economy**

New forms of mixed-use development that foster concentration and connections will support the growth of new regional clusters and specializations.

#### **STRATEGY 7:**

##### **Develop New Capacity and Governance for Regional Development**

New institutional capacity and governance will improve the region's ability to perform ongoing market analysis, reduce competition within the region, and guide implementation of the new approach to economic development outlined in the plan. ■





## IMPLEMENTATION: CALL TO ACTION

### ***Focus: A Roadmap for Transforming the Metro Memphis Economy***

offers the region a shared vision for its future and the opportunity to set a new course, as well as a guide for organizing a new level of partnership and collaboration across the region.

The first challenge is to unite behind a solid plan to reinvigorate the economy, better align work already underway, and bring sustained focus to all of those efforts. It will require the creation of new capacity and a new governance structure to guide implementation of the plan, establishing it as a new way of conducting economic development.

In partnership with EDGE—the Economic Development Growth Engine for Memphis and Shelby County, Memphis Tomorrow, the Greater Memphis Chamber of Commerce, and other regional partners, the co-chairs who have guided the development of ***Focus: A Roadmap for Transforming the Metro Memphis***

**Economy** will reestablish its steering committee under the umbrella of Memphis Fast Forward, adding more industry leaders and representation from diverse stakeholders to guide implementation.

In coordinating action with key partners to ensure alignment, leadership will establish performance metrics, track progress, and hold partners accountable as implementation moves forward. It will build ongoing capacity for market analysis, identifying opportunities and prioritizing next steps.

In the first phase of implementation, the region will strengthen its workforce development system to prepare more workers for next economy jobs. The



Greater Memphis Alliance for a Competitive Workforce will leverage new state programs that expand access to community colleges and training and strengthen alignment with regional employers and real-world skill requirements.

The Alliance will target specific growth sectors, engaging employers to create a pipeline for workers to gain skill credentials for specific career pathways. Its business plan, already under development, calls for significant new resources to enhance the region's system of workforce development by substantially improving its performance at every level.

In other early stage implementation, the region will develop a comprehensive approach to increase exports and global trade, leveraging its world-class logistics hub as the gateway to new markets for regional firms.

The region will also explore the establishment of an innovation district tailored to next economy firms and workers in the vicinity of the downtown medical center. Early-stage work focused on biologistics to pursue development of higher-value supply chains is also underway.

These and other subsequent initiatives will require a high level of commitment and the alignment of vision, resources, talent, and infrastructure across the region. They will require vigilance and dedication to stay the course in pursuing a vision for Metro Memphis that will strengthen its position in the global economy.

**Focus: A Roadmap for Transforming the Metro Memphis Economy** calls upon Metro Memphis to become a region of pragmatic idealists facing facts, building on existing strengths, and addressing those challenges that hold the region back.

It also requires regional leaders to undertake the challenge of repositioning Metro Memphis for a new economic era. If executed successfully, it will impact the lives of more than a million people in the metro area, creating better jobs, a higher standard of living, and a more prosperous region. ■

**“In coordinating action with key partners to ensure alignment, leadership will establish performance metrics, track progress, and hold partners accountable as implementation moves forward.”**



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# MEMPHIS & SHELBY COUNTY REGIONAL ECONOMIC DEVELOPMENT PLAN

## WORKING GROUPS

### CLUSTERS & CONCENTRATIONS

Steve Bares, President & CEO, Memphis Bioworks Foundation  
 Allan Bowden, UWT Logistics (First Vice President, World Trade Club)  
 Bill Bullock, Manager of Economic Development, Memphis Light Gas & Water  
 Elizabeth Cawein, CEO, Signal Flow PR  
 Jim Crone, Trane  
 Janie Day, Executive Director, Germantown Chamber of Commerce  
 Keith Dillihunt, Economic Development Specialist, EDGE  
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 Meka Egwuekwe, Sr. Architect/Co-Dir. of Development, Lokion  
 Charles Gulotta, President, Millington Chamber of Commerce  
 Mark Herbison, Senior Vice President, Economic Development, Greater Memphis Chamber of Commerce  
 Dr. Bruce Kirksey, Director of Research, AgriCenter International  
 Dr. Balaji Krishnan, Director of International MBA Program/Professor Marketing & Supply Chain, U of M  
 Mark Lange, President/CEO, National Cotton Council of America  
 Eric Matthews, Start Co.  
 Jim McDougal, Program Director, Memphis Area Association of Governments  
 Anthony Milton, Owner, Synergy Technologies Group  
 Joann Massey, Business Development Consultant, Tennessee Dept. of Economic & Community Development  
 John Threadgill, President, Bartlett Area Chamber of Commerce

### EXPORTS & INTERNATIONAL BUSINESS

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 Robby Beau, Managing Director, FedEx Express  
 Devin Buford, International Portfolio Manager, First Tennessee  
 Ordis Copeland, Business Development Consultant, State of Tennessee ECD  
 Michael Drury, Chief Economist, McVean Trading & Investments  
 Gwyn Fisher, Regional Director, State of Tennessee ECD  
 Michael John Florio, Senior VP, American Marsh Pumps  
 Hayley Hovious, Trade Director, State of Tennessee  
 Phil Johnson, Director of Economic Development, Bartlett Area Chamber of Commerce  
 Anna Kelly, Chairperson, Memphis Hispanic Chamber of Commerce  
 Dr. David Kemme, Chair of Excellence in International Economics, U of M (Executive Director, Economic Club)  
 Kevin Kern, Director of Public Relations, Elvis Presley Enterprises  
 Ken Lipkowitz, Lakeland Chamber  
 Mike Mitchell, Technical Advisor, FedEx Services  
 Betsy Olim, Olim International  
 Iddo Patt, Director & Executive Producer, Modern Production Concepts  
 David Radloff, VP, Mueller Industries

Andy Randle, VP Sales & Marketing, Ace Pump Corporation  
 Chris Schnee, General Manager/VP Sales & Marketing, Christie Medical  
 Sarah Sieloff, White House Council on Strong Cities Strong Communities  
 Leigh Shockey, CEO, Drexel Chemical (Chair Tennessee District Export Council)  
 David Spann, U.S. Department of Commerce  
 Earnest Strickland, Director of Economic Development, Greater Memphis Chamber of Commerce  
 Rory Thomas, Executive Director, Tennessee SBDC

### HUMAN CAPITAL

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 Steve Bares, Present/Executive Director, Memphis Bioworks Foundation  
 Mike Carpenter, Legislative Affairs, City of Memphis  
 David Cox, Assistant to the President, University of Memphis  
 John Churchill, Southwest Tennessee Community College  
 Jon Crisp, Suburban Chambers Alliance  
 Reid Dulberger, EDGE  
 Eugene Eckstein, University of Memphis  
 Desi Franklin, Senior VP and Assistant General Counsel, First Horizon  
 Nathan Garrett, Tennessee College of Applied Technology  
 Lee Grehan, Assistant Director, Sparks Bureau of Economic Research  
 Kim Hackney, Director of Legislative Affairs, Shelby County  
 Laura Hine, Workforce Investment Network  
 Russell Ingram, President, Tennessee Data Commons  
 Phil Johnson, Director of Economic Development, Bartlett Area Chamber of Commerce  
 Martha Mooneyhan, Concorde Career College  
 Gibson Sunny Morris, Consultant  
 Barbara Prescott, Executive Director, PeopleFirst Partnership  
 Roland Rayner, President, Tennessee College of Applied Technology  
 Skip Redmond, William R. Moore College of Technology  
 Douglas Scarboro, Chief Learning Officer, Office of Talent Development  
 Willie Slate, Memphis City Schools/Shelby County Schools  
 Maura Sullivan, Deputy CAO, City of Memphis  
 Blair Taylor, President, Memphis Tomorrow  
 John Threadgill, President, Bartlett Area Chamber of Commerce  
 Ted Townsend, Assistant Commissioner of Strategy, State of Tennessee ECD  
 Pauline Vernon, Memphis Bioworks Foundation  
 Melanie Winfield, Workforce Investment Network  
 Diana Wilkerson, Tennessee College of Applied Technology  
 David Williams, President, Leadership Memphis  
 Delories Williams, Greater Memphis Chamber

### INNOVATION & ENTREPRENEURSHIP

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 Kevin Boggs, Vice President Tech Transfer, FedEx Institute of Technology at U of M  
 Jan Bouten, Partner, Innova  
 Marie Burgess, Planner, City of Germantown  
 Jonathan Cross, President, Jonathan Cross Ventures & Holdings  
 Alandas Dobbins, Director, Mayor's Office of Resources & Enterprise  
 Christine Donhardt, Planner, Shelby County Office of Sustainability  
 Leigh Anne Downes, Director of Economic Development, Greater Memphis Chamber of Commerce  
 Tal Frankfurt, CEO, Cloud for Good  
 Andre Fowlkes, Start Co.  
 Richard Magid, Vice President, UT Research Foundation  
 Melinda McNeely, Smith & Nephew  
 Tommy Pacello, Mayor's Innovation Delivery Team  
 Fran Persechini, President/CEO, Collierville Chamber of Commerce  
 Natalie Robinson, Memphis Minority Business Council  
 Gary Stevenson, Partner, MB Ventures  
 David Waddell, President/Chief Investment Strategist, Waddell & Associates (Treasurer, Economic Club)  
 Chris West, Need Registry/Formerly with GTX  
 Laura Whitsitt, Senior VP Research & Emerging Technologies, Smith & Nephew  
 Ted Townsend, Assistant Commissioner of Strategy, State of Tennessee ECD

### SPATIAL EFFICIENCY

Laura Adams, Executive Director, Shelby Farms Park Conservancy  
 Mairi Albertson, Administrator, Housing & Community Development  
 Les Binkley, Vice President, Boyle Investments  
 Steve Berger, Principal, BR3GS Architects  
 Marie Burgess, Planner, City of Germantown  
 John Cameron, City Engineer, City of Memphis  
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