



# Florida Strategic Plan for Economic Development





In two years our team has worked hard to better align the state's public and private economic development resources to meet the needs of customers. The seamless work between the new Department of Economic Opportunity and Enterprise Florida is working to deliver jobs and accountability. This plan was the first time the state has developed a strategy to utilize strengths of Florida's public and public/private partnerships. It is a great start to maximizing efficiency, creating jobs, and providing metrics to the stakeholders.

**Gray Swoope**  
**Secretary of Commerce and President & CEO, Enterprise Florida**

Ensuring Florida has a pipeline of workforce talent with the right skills at the right time is essential to our business retention, recruitment, and expansion efforts. Florida's demand-driven workforce system is a national leader – a testament to our business leadership and key partnerships with education and training providers. We must continue to strengthen those relationships to provide market-relevant talent solutions, so that all Floridians seeking employment will be able to find work. This plan provides strategies to give Florida a competitive edge, positioning our state as a global business and talent leader.

**Chris Hart IV**  
**President & CEO, CareerSource Florida**



The Department of Economic Opportunity was created to streamline economic, workforce, and community development functions. This strategic plan is a first and important step toward realizing that vision. It is based on broad input and reflects the consensus of many stakeholders across Florida. The private sector is the engine of a robust economy, but it is critical that governments at every level create the opportunity environment that allows the private sector to thrive.

Collaboration and alignment among state, regional, and local entities will ensure a reliable and consistent business climate for Florida. We at DEO look forward to continuing our work together to make Florida the best state in the nation to live, work, play, and do business.

**Jesse Panuccio**  
**Executive Director, Department of Economic Opportunity**

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# Executive Summary

The future for the Sunshine State is brighter than ever as the nation emerges from its most severe recession in post World War II history.

Florida is located in the fastest growing part of the United States and at the crossroads of north/south and east/west trade lanes in an increasingly global economy. The state has tremendous assets: a large and diverse consumer and labor market; a tradition of imagination and invention; extensive infrastructure and natural resources; and worldwide appeal to workers, retirees, and visitors.

## VISION

Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, play, work, and do business.

## GOALS

- Lead the nation in global competitiveness as a location for business, investment, talent, innovation, and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

After three years of retreat, Florida's economy began to recover in 2010 and gained momentum in 2011. This growth has continued through 2012 and into 2013. Employment is rising, unemployment is falling, and businesses are expanding again.

The seeds of Florida's next wave of growth are evident. To date, the recovery has been driven by global trade, tourism, technology, professional services, and health services – all industries likely to grow in the coming years. This is good news. For Florida to continue to be competitive, our economy must rely on more than our natural resources and a continued stream of new residents and visitors. As Florida's economic vision is realized, Florida will transition from being a state driven primarily by growth to a state driven by talent, innovation, quality of life, and global connectivity.

The Florida Strategic Plan for Economic Development builds on a strong partnership of public, private, and civic organizations. It defines goals, objectives, and strategies to move Florida toward its economic vision. This plan emphasizes:

- Aligning state, regional, and local plans and programs around the state's economic vision.
- Developing a portfolio of strong talent and innovation clusters that bring together skilled labor and innovation-oriented businesses in expanding and emerging markets.
- Strengthening and connecting Florida's economic regions to create a "megaregion" able to compete on a global scale.
- Positioning Florida to be a global hub for trade, visitors, talent, innovation, and investment.



This plan also emphasizes Florida's position as a world-class state in aspects of what makes us truly competitive in today's economy:

- Leading the nation in student performance and market-relevant workforce skills.
- Diversifying Florida's economy into a mix of growing industries and expanding our role in both national and global markets.
- Modernizing Florida's infrastructure and reforming growth and investment decision-making processes to support a competitive economy and high quality of life.
- Developing the nation's leading business climate, including a predictable and sensible legal and regulatory environment and efficient and customer-focused business support services.
- Creating strong statewide and regional partnerships to meet Florida's economic development goals.
- Developing the nation's leading communities of choice to live, learn, work, and play.

Florida's economic development partners will implement this plan by aligning their plans and programs, coordinating their activities, and measuring and reporting their progress toward achieving the plan's goals and objectives. Together, this partnership will further position Florida for continued growth, competitiveness, and prosperity.



## Figure 1. At-A-Glance: The Florida Strategic Plan for Economic Development

**Vision:** Florida will have the nation’s top performing economy and be recognized as the world’s best place to live, learn, play, work, and do business.

**Goals:** Lead the nation in global competitiveness as a location for business, investment, talent, innovation, and visitors.  
 Lead the nation in economic growth and prosperity.  
 Lead the nation in quality of life.

**Objectives:** Improve and sustain employment in Florida.  
 Foster opportunities for prosperity for all Floridians.  
 Grow Florida businesses.  
 Expand Florida’s global commerce.  
 Increase Florida’s attractiveness to workers, residents, and visitors.

### Cross-Cutting Strategies

1. Strengthen collaboration and alignment among state, regional, and local entities toward the state’s economic vision.
2. Develop and implement a statewide strategy to develop regional talent and innovation clusters using global best practices.
3. Strengthen Florida’s economic regions and connect resources across regions to build Florida as a globally competitive megaregion.
4. Position Florida as a global hub for trade, visitors, talent, innovation, and investment.

### Area-Specific Strategies

Talent Supply and Education	Innovation and Economic Development	Infrastructure and Growth Leadership	Business Climate and Competitiveness	Civic and Governance Systems	Quality of Life and Quality Places
5. Align education and workforce development programs to foster employment opportunities and to develop and retain talented workers with the skills to meet current and future employer needs. 6. Develop an integrated pre-K through career education system to prepare students for becoming successful workers or entrepreneurs. 7. Lead the nation in STEM (science, technology, engineering, and mathematics) research, education, and market-relevant technical skills. 8. Expand access to education and training programs for talent in distressed markets.	9. Strengthen Florida’s leadership in expanding and emerging talent and innovation clusters and help transition established clusters to serve new markets. 10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization and capital to create, nurture, and expand innovation businesses. 11. Expand the number of Florida businesses selling goods and services internationally and help diversify the markets they serve. 12. Brand and consistently market Florida as the best state for business.	13. Coordinate decision-making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce, and community development at the statewide, regional, and local levels. 14. Develop and maintain multimodal, interconnected trade, and transportation systems to support a prosperous and globally competitive economy. 15. Develop and maintain a cutting-edge telecommunications infrastructure. 16. Ensure the future supply and quality of water to meet Florida’s economic and quality of life goals. 17. Develop and maintain diverse, reliable, and cost effective energy sources and systems to meet Florida’s economic and environmental goals.	18. Revise permitting, development, and other regulatory processes to meet changing business needs and to provide a predictable legal and regulatory environment. 19. Ensure state, regional, and local agencies provide collaborative, seamless, consistent, and timely customer service to businesses and workers. 20. Reduce barriers to small/ minority business and entrepreneurial growth. 21. Expand opportunities for access to capital for businesses throughout their life-cycle. 22. Work with industry to ensure property and health insurance rates are competitive with other large states. 23. Develop a government revenue structure that encourages business growth and development.	24. Support and sustain statewide and regional partnerships to accomplish Florida’s economic and quality of life goals. 25. Improve the efficiency and effectiveness of government agencies at all levels. 26. Invest in strategic statewide and regional economic development priorities.	27. Create and sustain vibrant, safe, and healthy communities that attract workers, residents, businesses, and visitors. 28. Ensure Florida’s environment and quality of life are sustained and enhanced by future growth plans and development decisions. 29. Promote, develop, protect, and leverage Florida’s natural, art, and cultural assets in a sustainable manner.







# Introduction

During the 2011 Legislative Session, per Florida Statute 20.60, the Florida Department of Economic Opportunity (DEO) was created and tasked with developing a five-year statewide strategic plan to guide the future of Florida's economy. This planning effort is one step in the development of an integrated statewide vision for addressing economic development, land use, infrastructure, environmental stewardship, talent development, and community development over a 50-year period.

The plan was developed by the Florida DEO in partnership with Enterprise Florida, Inc. (EFI), CareerSource Florida (CSF), and the Florida Department of Transportation (FDOT). Leadership for plan development was provided by:

- The Governor and his executive staff.
- The Secretary of Commerce and President and Chief Executive Officer of Enterprise Florida, Inc.
- The President and Chief Executive Officer of CareerSource Florida
- The Executive Directors of the Florida Department of Economic Opportunity.

Many venues were used in this process to obtain input from and build consensus among economic development partners:

- One statewide summit.
- One statewide webinar.
- Ten regional forums.
- Eight targeted statewide forums with specific interest groups (e.g., small/minority business, rural, and international).
- Eleven briefings at regularly scheduled and called partner meetings.
- Seven workshops with specific interest groups (e.g., associations, partners, councils, and commissions).
- An interactive web site for public comment.

## Subsection 20.60 (5)(a)4, Florida Statutes calls for a plan for:

- Strategies for the promotion of business formation, expansion, recruitment, and retention through aggressive marketing, international development, and export assistance, which lead to more and better jobs and higher wages for all geographic regions, disadvantaged communities, and populations of the state, including rural areas, minority businesses, and urban core areas.
- The development of realistic policies and programs to further the economic diversity of the state, its regions, and their associated industrial clusters.
- Specific provisions for the stimulation of economic development and job creation in rural areas and midsize cities and counties of the state, including strategies for rural marketing and the development of infrastructure in rural areas.
- Provisions for the promotion of the successful long-term economic development of the state with increased emphasis in market research and information.
- Plans for the generation of foreign investment in the state which create jobs paying above-average wages and which result in reverse investment in the state, including programs that establish viable overseas markets, assist in meeting the financing requirements of export-ready firms, broaden opportunities for international joint venture relationships, use the resources of academic and other institutions, coordinate trade assistance and facilitation services, and facilitate availability of and access to education and training programs that assure requisite skills and competencies necessary to compete successfully in the global marketplace.
- The identification of business sectors that are of current or future importance to the state's economy and to the state's global business image, and development of specific strategies to promote the development of such sectors.
- Strategies for talent development necessary in the state to encourage economic development growth, taking into account factors such as the state's talent supply chain, education and training opportunities, and available workforce.



The statewide summit, hosted by Collaborative Labs of St. Petersburg College, produced the consensus-built initial vision, goals, objectives, and strategies for economic development in Florida. The regional forums were hosted in partnership with Florida's 11 regional planning councils. This provided an opportunity to align this plan with the Comprehensive Economic Development Strategies developed by the regional planning councils in their roles as federal economic development districts. These forums strengthened and refined the vision, goals, objectives, and strategies in the plan.

The Florida Chamber of Commerce hosted five international town halls all across Florida. Additionally, the Chamber hosted one of the statewide meetings focusing on small and minority businesses. The Department of Management Services hosted a second meeting focusing on small and minority businesses. Opportunity Florida hosted a statewide summit focused on rural issues. The Florida Association of Counties and Florida League of Cities also hosted workshops on the plan as part of their annual conferences. Staff members in the Executive Office of the Governor, the Senate, and the House of Representatives provided valuable direction, guidance, and support throughout the planning process.

Almost 3,000 partners, stakeholders, business representatives, and members of the public were brought to the table to collaborate and develop the plan. Extensive input was provided by Florida's state agencies, local and regional economic development organizations, regional planning councils, local governments, state and local elected officials, the business community, educational institutions, and the public. The planning process also included a synthesis of more than 30 existing statewide plans related to economic development, as well as over 20 regional plans and visions. Data on economic trends, best practices for economic development, and historic economic climate and conditions in Florida, the U.S., and internationally were considered and used as a part of the plan development. Cambridge Systematics, Inc. provided research and technical support throughout the plan development process.

Using the Florida Chamber Foundation's Six Pillars of Florida's Future Economy™, the plan establishes the strategic framework for coordinated action by the DEO, EFI, CSF, and other state agencies and organizations to improve Florida's economic competitiveness and create jobs for Floridians. The plan provides direction and support to regional and local partners in the public, private, and civic sectors as they work to strengthen Florida's economy in each region and community of the state.

This plan includes:

- The vision, goals, objectives, and comparative measures of Florida's current performance.
- Four cross-cutting strategies and 25 area-specific strategies with discussions of best practices and trends to help Florida accomplish the statewide vision, goals, and objectives.
- Key actions for plan implementation.

The *Florida Strategic Plan for Economic Development* will be revised and updated to respond to future challenges and opportunities.

External to this document is a technical appendix that provides detailed information about the indicators. Data throughout this plan are the most recent available from generally accepted federal and state data sources. Data definitions, sources, and other technical information are available in the plan appendix, published online at <http://www.floridajobs.org/FL5yrPlan>.

Also external to this document is an appendix that represents the collaborative efforts of state level agencies and organizations to identify key tactics and associated metrics from their own priorities and activities that support the goals, objectives, and strategies of the plan. This too can be assessed at <http://www.floridajobs.org/FL5yrPlan>.

# Florida's Vision, Goals, and Objectives

Florida's economic vision is to become the nation's top performing economy – recognized globally as the premier place to live, learn, play, work, and do business. This is a bold vision, which we can accomplish as several converging trends offer great promise for Florida over the next few decades:

- U.S. population and economic growth are shifting to the South and West, placing Florida in the fastest growing part of the nation.
- Global trade is surging, particularly through the Panama Canal and the Caribbean region.
- Personal and business travel continues to expand.
- Emerging industries such as life sciences, sustainable agriculture, and simulation have a strong foothold in Florida today.
- An increasingly mobile workforce that can choose to locate anywhere in the world to do business is choosing places with a high quality of life like Florida.

## VISION

Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, play, work, and do business.

## GOALS

- Lead the nation in global competitiveness as a location for business, investment, talent, innovation, and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

## OBJECTIVES

- Improve and sustain employment in Florida.
- Foster opportunities for prosperity for all Floridians.
- Grow Florida businesses.
- Expand Florida's global commerce.
- Increase Florida's attractiveness to workers, residents, and visitors.

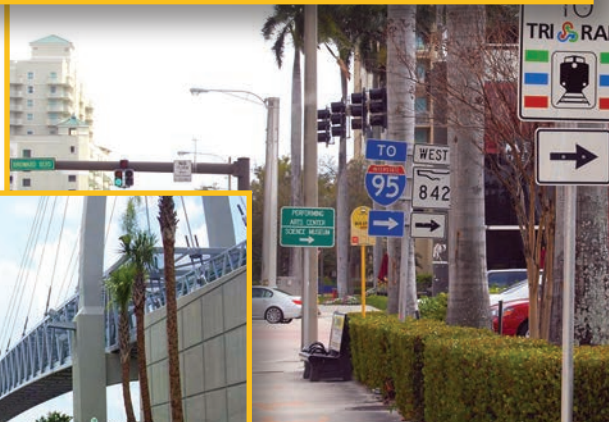


Florida will accomplish this vision by pursuing goals of leading the nation in three areas over the next five years and beyond:

- Global competitiveness, as a location for business, investment, trade, talent, innovation, and visitors.
- Economic growth and prosperity, setting the pace for growth in jobs, income, and business sales.
- Quality of life, attracting residents, workers, and visitors.

These goals are supported by five specific, measurable objectives, which call for Florida to:

- Create jobs to put unemployed Floridians back to work and support growth in Florida's labor force.
- Create opportunities for Florida workers to increase wage and income levels.
- Grow Florida's business activity and help create, expand, retain, and attract businesses to Florida.
- Expand Florida's global trade and investment.
- Increase Florida's attractiveness as a location for workers, residents, and visitors.



# Florida's Competitive Position

Florida's vision directs us to consider the state's competitive position in a broader sense by addressing three key areas:

- Global competitiveness.
- Economic growth and prosperity.
- Quality of life.

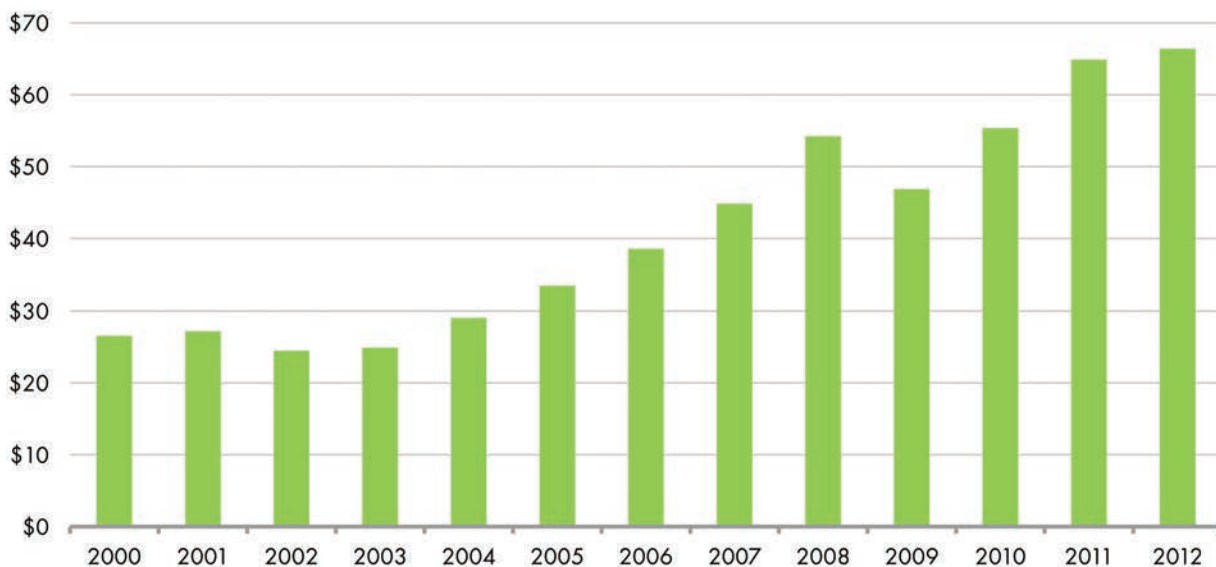
## Global Competitiveness

With a gross domestic product (GDP) of \$790 billion in 2012, Florida's economy is the 4<sup>th</sup> largest in the U.S. It would rank 18<sup>th</sup> in the world if measured as its own country. Per capita GDP of nearly \$40,913 in 2012 lags the U.S. average by 19 percent, but is comparable to that of Germany.

Florida's activity and national ranking in the global market has expanded over the past decade. Florida currently ranks 2<sup>nd</sup> in the nation for international visitors, 6<sup>th</sup> for state-of-origin exports, 6<sup>th</sup> for employment in foreign-owned firms, and 10<sup>th</sup> for state-of-destination imports.

On a high note, the value of Florida-origin exports reached record levels in 2012 and has more than doubled since 2005. The value of Florida-origin exports equaled 8.5 percent of the state's GDP in 2012, compared with 9.9 percent for the U.S. as a whole.

**Figure 2. Florida-Origin Exports, 2000 to 2012**  
in Billions of Dollars



Source: U.S. Department of Commerce, in current year dollars.

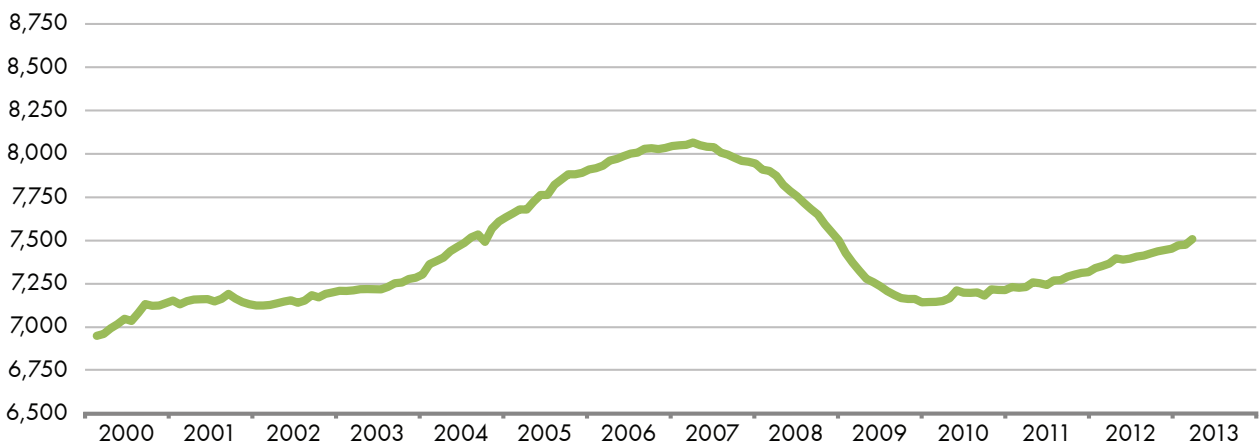


## Economic Growth and Prosperity

From the 1950s through 2006, Florida was one of the nation's top performing economies in terms of growth in both population and jobs. However, to lead the nation in both growth and prosperity, the state will have to further develop industries that bring sustainable, longer-lasting, and higher-paying jobs to Floridians.

Fueled by gains in housing and construction, Florida created more than one million new jobs between 2000 and 2007, growing by rates double that of the national average. From early 2007 to early 2010, the state lost 920,000 jobs, experiencing a much sharper and longer contraction than the nation as a whole. Since 2010, Florida has been experiencing slow but steady job growth, roughly tracking the national pace. As of March 2013, the state has recovered more than two out of every five jobs lost during the recession.

**Figure 3. Total Nonagricultural Employment in Florida, 2000 to March 2013**  
in Thousands of Jobs

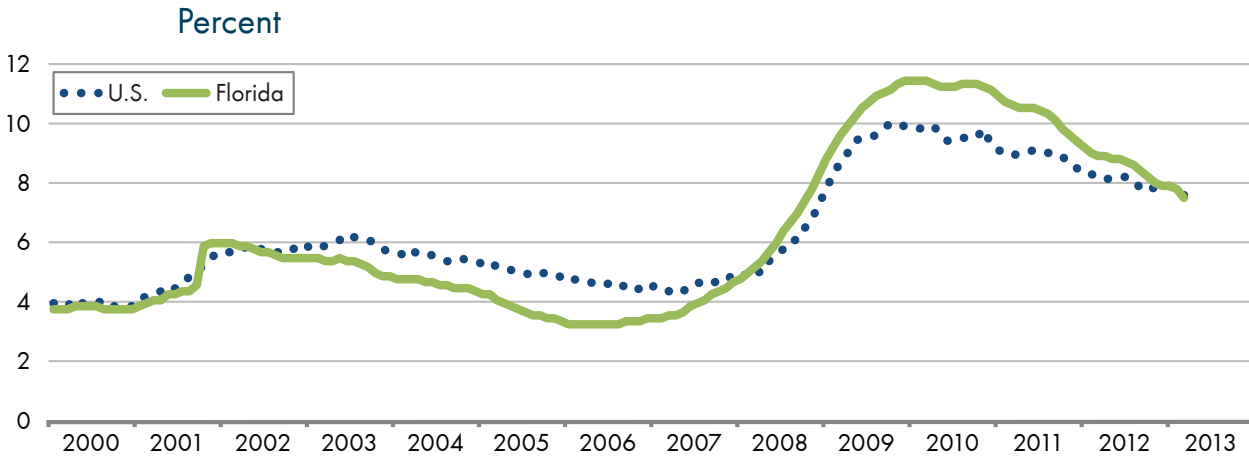


Source: U.S. Department of Labor, Bureau of Labor Statistics.

Between 2000 and 2007, Florida's unemployment rate tracked at or below the U.S. average. People looking for work in Florida generally were able to secure employment. The job losses brought by the recession changed this dynamic as the state's unemployment rate remained above 11 percent for 16 months in 2009 and 2010. Florida's unemployment rate is now declining and as of March 2013 was 7.5 percent, the lowest rate in more than four years.

Although Florida's unemployment rate has begun to decline, there remain substantial numbers of people looking for jobs. As of March 2013, 705,000 Floridians remained unemployed, many for six months or longer.

**Figure 4. Unemployment Rates in Florida and the United States, 2000 to March 2013**

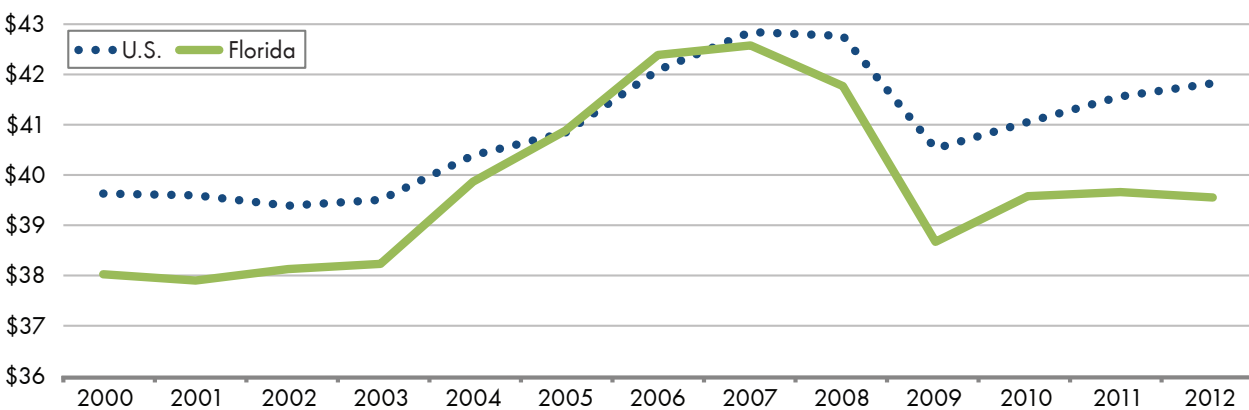


Source: U.S. Department of Labor, Bureau of Labor Statistics.

After adjusting for inflation, Florida's gross domestic product (GDP) expanded 30 percent between 2000 and 2007 and shrank nine percent between 2007 and 2009 before beginning a slow recovery. Florida's GDP remains about six percent smaller than its 2007 peak.

Florida's per capita income follows a similar pattern of boom, contraction, and recovery. After many years below the U.S. average, Florida's per capita income exceeded the nation's in 2006, but fell behind again during the recession. Although 2010 and 2011 brought some growth in per capita income, the income gap between the U.S. and Florida has widened. As of 2012, Florida's per capita income lagged the U.S. average by six percent, primarily due to below national average wages.

**Figure 5. Per Capita Income in Florida and the United States, 2000 to 2012**  
in Thousands of 2011 Dollars



Source: U.S. Department of Commerce, Bureau of Economic Analysis. Annual figures are inflation-adjusted to constant 2011 dollars.

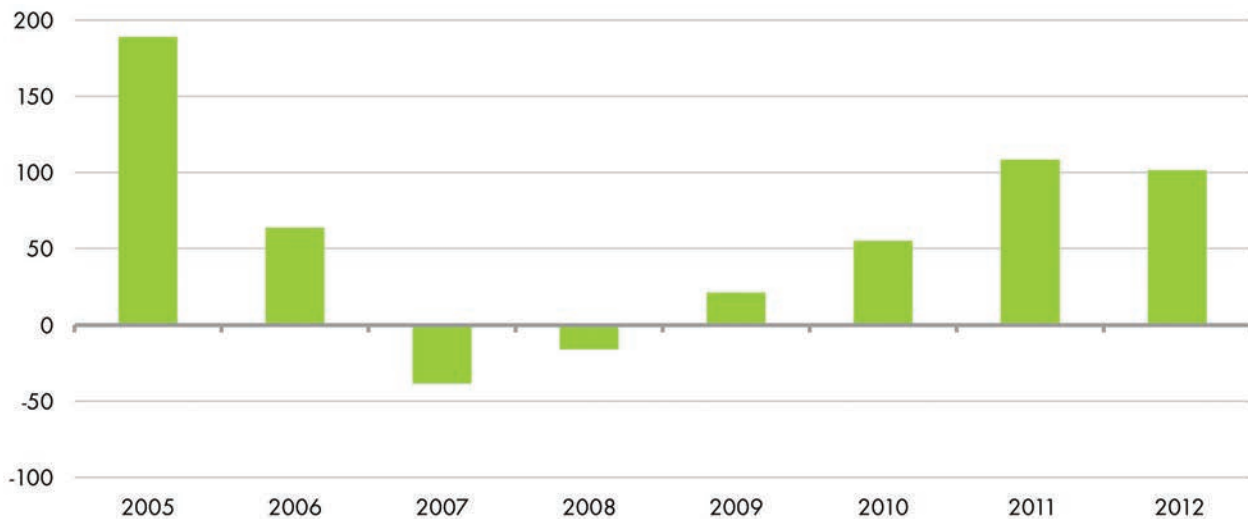


## Quality of Life

Without a doubt, Florida is a desirable place to live. The year-round temperate climate allows residents to enjoy the state's beautiful natural environment, including some of the world's top beaches, freshwater lakes, and rivers. Florida's population is one of the most diverse in the nation, and the state boasts a rich mix of arts, cultural, and historic resources.

Florida has been a magnet for job-seekers and retirees from other parts of the U.S. for many years, but Florida lost residents to other states with more job opportunities in 2007 and 2008. The good news is that net migration (more people moving into the state than leaving) resumed in 2009 and gained strength in 2010 and 2011. The outlook is good for this trend to continue in the coming years.

**Figure 6. Population Growth in Florida**  
Net Domestic Migration in Thousands



Source: U.S. Census Bureau, American Community Survey.

Even with many natural assets and strong population growth, threats to Florida's quality of life include unemployment and the lingering effects of the housing crisis. An estimated 40 percent of all mortgages in Florida are currently more than the homes are worth; the 2<sup>nd</sup> highest share among the 50 states.

Florida's quality of life faces additional pressures. One in six residents now earns less income than the poverty level. Florida has the nation's 3<sup>rd</sup> highest share of residents without public or private health insurance, about 3.9 million people, and measures of health and wellness are under pressure. The violent crime rate has dropped over the last decade, but remains above the national average.

Preserving and strengthening Florida's quality of life assets and addressing threats in this next wave of economic growth are essential to keep Florida's future bright.



**Table 1. Florida's Economy – Key Indicators to Watch**

What Matters	Baseline	Most Recent	U.S. Rank	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
<b>Objective: Improve Employment in Florida</b>						
Total Employment (annual average)	8.0M (2007)	7.4M (2012)	4			365,000 new jobs since early 2010 but still 560,000 short of 2007 peak.
Unemployment Rate (annual average)	4.0% (2007)	7.5% (March 2013)	32			Dropping faster than U.S. but still well above prerecession levels.
Initial Jobless Claims	167,208 (Q4 2007)	182,281 (Q4 2012)	10			Initial jobless claims are declining but remain high.
<b>Objective: Foster Opportunities for Prosperity for all Floridians</b>						
Average Annual Wage, 2011\$	\$43,119 (2007)	\$42,310 (2011)	28			9% below national average and lower than 2007 levels when adjusted for inflation.
Per Capita Income, 2011\$	\$42,588 (2007)	\$39,526 (2012)	27			6% below national average and lower than 2007 levels when adjusted for inflation.
<b>Objective: Grow Florida Businesses</b>						
Gross Domestic Product, 2011\$	\$823B (2007)	\$774B (2012)	4			Recovering but still 6% below the 2007 peak when adjusted for inflation. Only Nevada's economy had a sharper decline.
Net Business Creation	-3,187 (2007)	+4,588 (2011)	2			Florida ranks 2 <sup>nd</sup> among the states for both new business startups and failures or bankruptcies of existing businesses. The total number of businesses shrank during the recession.
Net Business Relocations	+332 (2008)	+1,152 (2011)	4			Gaining from Northeast and Midwest, losing to other states in the South.
Capital Investment	\$3.7B (2007)	\$2.9B (2011)	18			Capital expenditures are improving; economic rebound and on-shoring may stimulate investment.
<b>Objective: Expand Florida's Global Commerce</b>						
Florida-Origin Exports, 2011\$	\$49B (2007)	\$65B (2012)	6			Doubled since 2005.
Jobs at Foreign-Owned Firms	248,200 (2007)	223,600 (2010)	6			Manufacturing accounts for one-quarter of jobs at foreign-owned companies.
<b>Objective: Increase Florida's Attractiveness to Workers, Residents, and Visitors</b>						
Net Domestic Migration	-38,300 (2007)	+101,400 (2012)	2			More people moving into Florida again, although still below the 2005 peak.
Total Visitors	81M (2009)	89M (2012)	NA			Up 8 million in 3 years, including both domestic and international visitors.

<sup>a</sup> Since 2010.





Photo courtesy of [www.seefloridago.com](http://www.seefloridago.com).

# Florida's Economic Development Strategies

Accomplishing Florida's economic vision requires a more coordinated and enhanced approach to economic development. This approach builds on the state's assets, while reflecting global best practices and positioning Florida to be a leader in the U.S. and internationally. This plan identifies 29 strategies for achieving the aspirational vision, goals, and objectives for economic development in Florida over the next five years.

Four overarching strategies are critical elements of the state's economic development effort and will help Florida accomplish the vision and goals defined by this plan. These strategies will require many years to accomplish – beginning with conceptualization and design to full realization of implementation, which most likely will extend beyond the five years covered in this initial plan.

## Florida's Cross-Cutting Strategies

1. Strengthen collaboration and alignment among state, regional, and local entities toward the state's economic vision.
2. Develop and implement a statewide strategy to develop regional talent and innovation clusters using global best practices.
3. Strengthen Florida's economic regions and connect resources across regions to build Florida as a globally competitive megaregion.
4. Position Florida as a global hub for trade, visitors, talent, innovation, and investment.

**Table 2. Florida's New Economic Development Directions**

Today's Challenges	Tomorrow's Opportunities
Many organizations, many plans.	Create statewide and regional partnerships aligned around a common vision and planning framework.
Emphasis on individual businesses or industries and general occupational training needs.	Develop world-class talent and innovation clusters.
Orientation toward individual cities and counties.	Collaborate to develop strong regions and megaregions.
Traditional emphasis on local and regional markets.	Shift toward global markets.
Focus on incentives and specific projects.	Emphasize foundations of a competitive economy.



*Cross-Cutting Strategy #1:*

**Strengthen Collaboration and Alignment Among State, Regional, and Local Entities Toward the State's Economic Vision.**

To become the nation's top performing economy, Florida will need effective, coordinated, and collaborative partnerships – among the private, public, and nonprofit sectors; among local, regional, and statewide organizations; and among organizations responsible for business development, workforce, education, research, transportation, energy, water, community planning, housing, environmental protection, health services, and many other related areas.

Today, there are many organizations involved in some aspect of economic development in Florida, including more than 27 state agencies, 5 statewide public/private partnerships, 67 counties, 411 municipalities, 11 regional planning councils, 24 regional workforce boards, more than 100 economic development organizations, and hundreds of chamber of commerce, convention and visitors' bureaus, educational institutions, and community development organizations. Each of these organizations has its own mission, plans, and programs. This fragmentation can dilute efforts and confuse businesses and other stakeholders.

Moving forward, the goal is for this plan to guide *all* of Florida. We can harness the collective power of all of these entities to accomplish common goals. There are two critical elements of alignment:

- **Align state agencies to enable coordinated action.** Florida's Governor and Legislature recognized the importance of these partnerships in 2011 when they combined the agencies responsible for community, workforce, and economic development into DEO. To further the alignment process, state-level agencies and organizations have designated Economic Development Liaisons S.288.021, Fla.Stat. to work together to respond quickly to economic opportunities and to coordinate policies and investments to position the state for long-term growth and competitiveness.
- **Align state, regional, and local partners around common vision and goals.** State agencies must work in concert with regional and local partners such as economic development organizations, regional planning councils, regional workforce boards, and chambers of commerce. To achieve and guide this alignment, this plan uses the Six Pillars of Florida's Future Economy™, a framework developed by the Florida Chamber Foundation that identifies the key drivers of Florida's future economy using common language and indicators to facilitate partner collaboration. The Six Pillars also has been adopted by the Florida Association of Counties, the 11 regional planning councils in their role as federal economic development districts, regional partnerships, and individual counties across the state.



Photo courtesy of [www.seefloridago.com](http://www.seefloridago.com).

## Agencies and Organizations with Appointed Economic Development Liaisons, March 2013

- Department of Business and Professional Regulation
- Department of Economic Opportunity
- Department of Education
- Department of Environmental Protection
- Department of Health
- Department of Management Services
- Department of Revenue
- Department of State
- Department of Transportation (including district offices and turnpike)
- Enterprise Florida, Inc.
- Florida Fish and Wildlife Conservation Commission
- Regional Planning Councils
- Water Management Districts
- CareerSource Florida



### *Cross-Cutting Strategy #2:*

## **Develop and Implement a Statewide Strategy to Develop Regional Talent and Innovation Clusters Using Global Best Practices.**

Talent and innovation clusters – geographic concentrations of interconnected businesses, skilled labor, suppliers, service providers, and other institutions in a particular field – tend to organize at regional levels. Examples of well-known clusters nationwide include: Silicon Valley (electronics, software, digital media); Boston (life sciences, higher education, financial services); New York (financial services, media, pharmaceuticals); Seattle (aerospace, information technology); Houston (energy, chemicals); Detroit (motor vehicles); and Los Angeles (entertainment, design, trade).

Clusters are important because they sell goods and services outside of a state or region, bringing income into an economy. Cluster approaches are used by many regions, states, and nations around the world. National studies have shown that successful clusters are associated with increased rates of business formation and growth, higher wages, greater productivity, and more rapid cycles of innovation.

Florida must make cluster development the centerpiece of the state's economic development strategy, with two important emphases:

- A regional approach, wherein the state supports and works with each region to document current assets and to identify and develop the clusters best suited to that region.
- An integrated approach that looks beyond traditional views of industries and focuses on the places in Florida where innovation-oriented businesses and skilled labor collocate.

Ultimately, the goal is to continue to grow regional talent and innovation clusters that reflect concentrations of leading-edge businesses, skilled labor, and supporting institutions in the same geographic locations.

During the past few years, Enterprise Florida and CareerSource Florida have focused their efforts on a common set of statewide targeted industries and clusters, including support through CareerSource Florida for statewide CEO-level task forces to better understand needs and opportunities in these industries and clusters. The state also has invested in centers of excellence for research or talent development in specific industries. Multiple counties and regions have updated their targeted industries, often examining broader clusters; in many cases, state support through Enterprise Florida or CareerSource Florida has helped initiate these efforts. Building on this recent progress, the state's role is to:

- Seed and support regional initiatives to identify and develop strategies in support of key clusters.
- Shape strategies for clusters of statewide significance that are important to multiple regions.
- Help align education, training, research, infrastructure, regulations, and other public policies and investments to address each cluster's opportunities and needs.

### Best Practices

The life sciences industry has emerged as a global growth leader, and the regional competition to attract and develop this cluster has become intense. The most successful life sciences clusters today combine research, testing, specialized legal and other business services, manufacturing, and applied medicine. Several distinct pockets of life sciences success stories are now located throughout the state. The Treasure Coast region from Palm Beach County to Indian River County has become the home of world-renowned research institutions, including the Max Planck Florida Institute, Scripps Florida, the Torrey Pines Institute for Molecular Studies, and the Vaccine and Gene Therapy Institute of Florida. Central Florida is developing a “Medical City” at Lake Nona to the southeast of Orlando, including the University of Central Florida Health Sciences Campus, Sanford-Burnham Medical Research Institute, VA Medical Center, Nemours Children Hospital, the University of Florida Academic and Research Center, and the MD Anderson Orlando Cancer Research Institute. These newer hubs join existing concentrations of hospitals, pharmaceutical, and medical device manufacturers in locations such as Gainesville, Jacksonville, Miami, Pensacola, and Tampa.



*Cross-Cutting Strategy #3:*

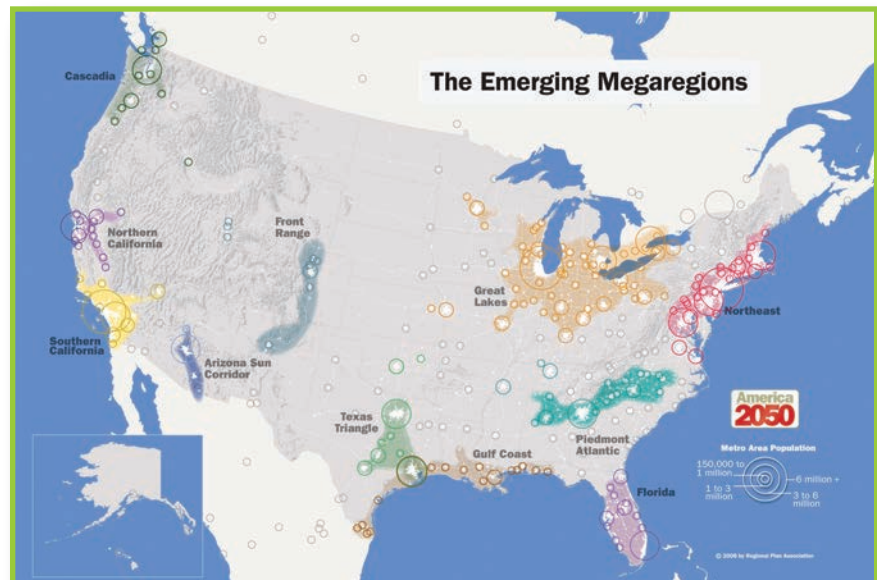
**Strengthen Florida’s Economic Regions and Connect Resources Across Regions to Build Florida as a Globally Competitive Megaregion.**

Across the globe, economic competition increasingly occurs at a regional scale. These regions are defined not by political boundaries or natural systems, but rather by commuting patterns, supply chains, and other business-to-business relationships. Over time, these economic regions are growing in size and complexity. National studies suggest that over the next several decades, global and U.S. economic growth will focus on a small number of “megaregions,” or networks of multiple cities and counties sharing common industry clusters, talent, and infrastructure. Most if not all of Florida’s existing metropolitan and rural areas could become linked together into one of these megaregions, with the boundaries of this megaregion potentially crossing into neighboring states.

During the past few years, multiple regions across Florida have convened public, private, and civic partners to identify common issues and develop collaborative solutions on issues such as workforce, economic development, transportation, infrastructure development, housing needs, and environmental stewardship. The state can play a key role in encouraging these regional partnerships and investing in the infrastructure and other programs to help build and sustain strong, competitive regions. Examples include regional economic development and workforce initiatives, as well as long-range regional visioning processes.

Looking to the future, the state will work to connect Florida’s regions together into a megaregion to provide the scale of resources needed to compete globally with other U.S. regions such as the Boston–New York–Washington corridor or Southern California. The state will work to build this megaregion by focusing on key industry clusters present in multiple regions, helping create and support interregional partnerships, and improving transportation and communications connectivity across regions.

The state also should take the lead in coordinating with neighboring states on economic development opportunities that cross state boundaries. Examples include the single brand of the four-state Aerospace Alliance, which includes Florida; another is Destination Gulf Coast USA, which focuses on beach-centered tourism for four states along Interstate 10.



Source: America 2050.



**Best Practices**

Both Tampa Bay and Central Florida have conducted visioning and collaboration efforts to explore how once separate counties and cities are becoming integrated economic regions. Under the leadership of the Tampa Bay Partnership and the Central Florida Partnership, the two regions are now working together to plan for their future as a much larger combined region ("Florida's Super Region"), which today would rank among the top 10 economies in the country with a gross regional product of \$300 billion. Recognizing their economic, social, and cultural ties, the two regions are working together for common long-term strategies in economic development, transportation, and environmental stewardship.



Additionally, Florida's High Tech Corridor, centered on Interstate 4 between Tampa Bay and Orlando but now encompassing 23 counties, displays the advantages of working across regions. The corridor combines the resources of 3 research universities, 14 state colleges, and 20 companies employing 238,000 workers - 70 percent of Florida's jobs in its targeted sectors.



Photo courtesy of [www.seefloridago.com](http://www.seefloridago.com)

*Cross-Cutting Strategy #4:*

**Position Florida as a Global Hub for Trade, Visitors, Talent, Innovation, and Investment.**

After decades in which the U.S. dominated the world economy, we have entered an era of strong growth in many continents. During the next 50 years, it is projected that more than 80 percent of worldwide economic growth will occur outside of the U.S. This means more markets for Florida goods and services; it also means more competition for Florida businesses.

Transportation and communications capabilities have extended markets for goods, services, and information – and competition for talent and capital – to a global scale in many key clusters. Florida is uniquely poised to compete in this global market because of its location close to the junction of north/south and east/west trade lanes, its large and diverse population and consumer and business markets, and its extensive infrastructure.

The Panama Canal widening in 2015 provides a unique opportunity, but Florida’s global opportunities extend beyond serving as a port of call for Canal traffic. Florida can become a global hub across multiple activities – trade and logistics, manufacturing and innovation, tourism and travel, and talent and investment – if the state acts strategically. The immediate opportunities to expand trade flows can provide a springboard for growing export-oriented industry clusters; developing a workforce that is diverse and has linguistic and cultural competence; developing, supporting, and attracting globally competitive entrepreneurs and innovators; and becoming the preferred location for businesses targeting the large consumer market in the Southeastern U.S., Latin America, and the Caribbean. Once the end of the line in the U.S., Florida can become the center of the economy in the Western Hemisphere.

To build on Florida’s early successes in these areas, the state should further expand:

- The state’s foreign policy by establishing strong working relationships with key trading partners.
- The state’s global marketing efforts.
- Investments in the transportation, trade, and telecommunications infrastructure needed to connect to global markets.
- Workforce, education, incentive, tax, regulatory, and other policies to support Florida’s global role.
- A talent pipeline that supports globally oriented, entrepreneurial economic development and trade.



**Best Practices**

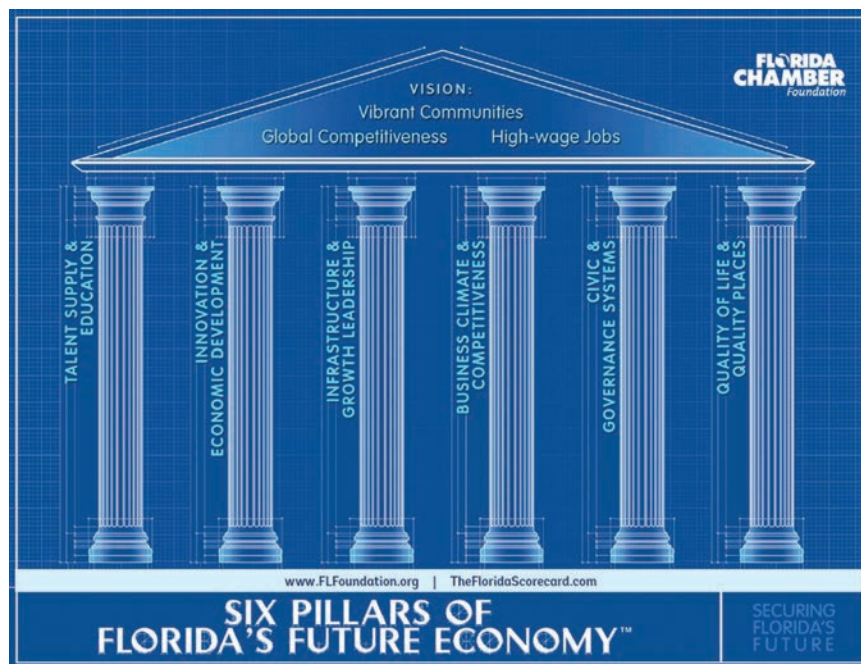
Southeast Florida has developed into the primary gateway between the U.S., Latin America, and the Caribbean. Southeast Florida is leveraging its three international airports, five deepwater seaports, consular corps, cultural attractions, international businesses and banks, and Enterprise Florida's international office to further its global hub role. Major capacity improvement and intermodal projects are underway at the region's deepwater seaports and airports. The region's economic development organizations, including the Beacon Council in Miami-Dade County, the Greater Fort Lauderdale Alliance, and the Business Development Council of Palm Beach County are jointly marketing the region globally as South Florida: Your Global Business Connection. Looking long-term, the South Florida Regional Planning Council and the Treasure Coast Regional Planning Council have assembled 200 partners as part of the Southeast Florida Regional Partnership, which is developing a seven-county, 50-year regional prosperity plan known as Seven50.



## Area-Specific Strategies

The four cross-cutting strategies are supported by 25 additional strategies providing specific direction for key challenges and opportunities. To aid in alignment with other plans, these strategies are organized using the framework of the Florida Chamber Foundation's Six Pillars of Florida's Future Economy™. The Foundation worked with private, public, and civic leaders statewide to develop consensus around the Six Pillars as a common framework for envisioning the state's future economy. The Six Pillars were derived through a consensus-driven process that identifies the key drivers of Florida's future economy. They are being used as the framework for the Foundation's Six Pillars 20-Year Strategic Plan.

**Figure 7. Six Pillars of Florida's Future Economy**



The key themes in each of these pillars may be summarized as:

- **Talent Supply and Education.** Leading the nation in student performance and market-relevant workforce skills.
- **Innovation and Economic Development.** Diversifying Florida's economy and expanding national and global markets.
- **Infrastructure and Growth Leadership.** Modernizing Florida's infrastructure and growth decisions to support a competitive economy and high quality of life.
- **Business Climate and Competitiveness.** Developing the nation's leading business climate and customer-focused support services.
- **Civic and Governance Systems.** Creating strong partnerships to meet Florida's economic development goals.
- **Quality of Life and Quality Places.** Providing the nation's leading communities of choice to live, learn, work, and play.

## Talent Supply and Education:

*Leading the Nation in Student Performance and Market-Relevant Workforce Skills*

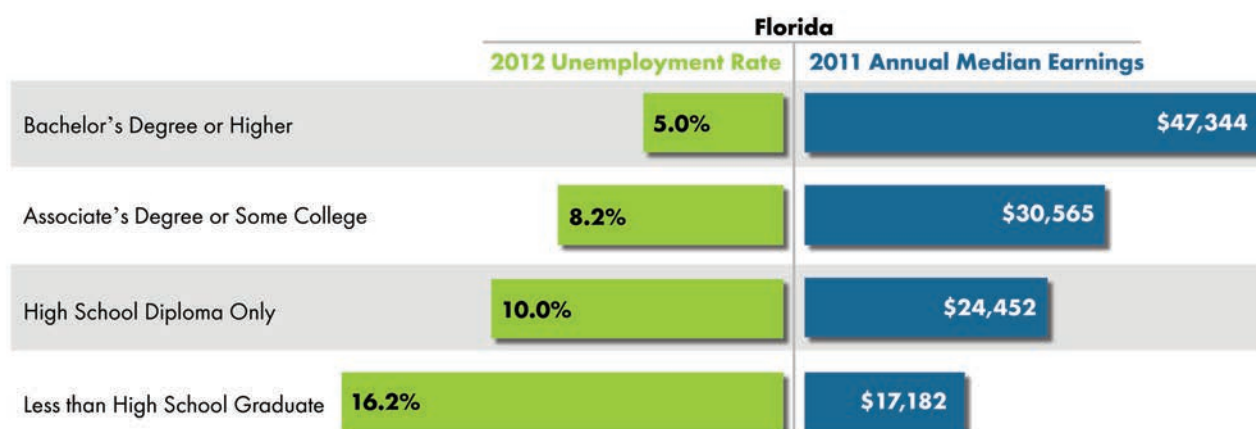
### Florida's Area-Specific Strategies

5. Align education and workforce development programs to foster employment opportunities and to develop and retain talented workers with the skills to meet current and future employer needs.
6. Develop an integrated pre-K through career education system to prepare students for becoming successful workers and entrepreneurs.
7. Lead the nation in STEM (science, technology, engineering, and mathematics) research, education, and market-relevant technical skills.
8. Expand access to education and training programs for talent in distressed markets.

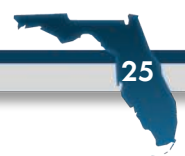
About two out of three jobs in 2019 will require some form of postsecondary education and training, with more than one-half requiring vocational education, industry certifications, or other technical training. With the baby boom generation beginning to retire and competition growing among states for skilled workers, the ability to retain and attract college graduates and other trained workers in Florida will become increasingly important.

Education and skill levels are strongly correlated with higher employment and incomes for both individuals and the state as a whole. Workforce skills will become an even more significant driver as our economy diversifies.

**Figure 8. The Benefits of an Educated Workforce**



Source: Florida Department of Economic Opportunity; U.S. Department of Commerce, Bureau of the Census, American Community Survey.














## Where We Stand

With 9.4 million workers, Florida has one of the nation’s largest and most diverse labor forces. Feeding this talent pool is an extensive system including 40 public four-year colleges and universities, more than 33 private colleges and universities, 24 regional workforce boards, 67 county school boards, and a variety of civic and private partners. This talent – and the education and workforce system behind it – is a tremendous asset for Florida’s future. The system faces several challenges:

- Florida’s educational and workforce development systems are not producing skilled workers at the rate needed to fill the jobs of today or over the next decade. Although the unemployment rate is declining, continued growth in the number of on-line help wanted ads and feedback from employers suggests that employers are having difficulty finding skilled workers. The gap is significant for positions requiring four year college degrees or higher as well as “middle skill” jobs requiring industry-specific training, credentials, or certifications.
- During the past decade Florida has realized overall improvements in test scores and completion rates. Florida’s educational system continues to strive to improve its educational performance on measures of pre-kindergarten to graduate school and career education (often referred to as “preK-20”). Additional improvements in high school graduation and college participation rates will further develop the future potential of Florida’s residents and businesses.
- The skills gap is particularly significant in positions requiring science, technology, engineering, and mathematics (STEM) skills. STEM jobs pay 26 percent more than those in other fields and are growing twice as fast as the rest of the economy. Florida has unique opportunities to create new knowledge industries by combining STEM skills with existing strengths in medicine, the arts, and other creative fields. Entrepreneurial skills and language proficiency also will be critical to Florida’s future opportunities.
- Workers and businesses in some parts of Florida – particularly in some rural areas, smaller cities, and urban core communities – do not have easy access to infrastructure, high-quality jobs, or skills training.

**Table 3. Talent Supply and Education – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
8 <sup>th</sup> Grade Test Scores			Math and science scores are improving, but remain in bottom third of the states and lag global competitors.
High School Graduation Rates			75% of students finish in four years; rates are lower for racial and ethnic minorities.
Public College Graduation Rates		NA	61% of Florida students who enter a public four-year college earn a degree within six years, well above the national average.
Middle Skill Workers			32% of Florida workers have completed a two-year college degree or a vocational or adult education program.
Workers with a College Degree			27% of the working age population has at least a four-year degree.
Workers with a STEM Degree			41% of Florida’s workers over 25 with college degrees majored in a STEM field, below the national average. Yet, Florida has the fourth highest number of people with advanced STEM degrees in the U.S.

<sup>a</sup> Since 2010.

## Best Practices

Covering Charlotte and Sarasota counties, STEMsmart improves the aptitude of middle and high school age children to learn science, technology, engineering, and mathematics. This helps prepare them for future jobs in advanced Florida industries. With public, non-profit, and private support, STEMsmart allows students to apply state-of-the-art equipment and practices for experiments in physics, health, biology, energy, and electronics. By exposing students to higher level science and engineering challenges, STEMsmart motivates young people to continue pursuing their interests through postsecondary studies in advanced fields.

**STEM**SMART<sup>+</sup>

## Where We Are Going

Florida's ability to produce skilled and ready workers depends on furthering the collaborative planning and work of our educational institutions, workforce development organizations, and businesses. Linking existing and new programs will help Florida's workers develop and continually refine their skills over the course of their careers to meet the current and fast-changing needs of businesses. CareerSource Florida is leading a statewide initiative to develop Florida's talent supply chain in collaboration with the Florida Chamber of Commerce, Florida Chamber Foundation, Florida Council of 100, Florida Department of Education, Florida College System, State University System, Independent Colleges and Universities of Florida, and Commission for Independent Education. This partnership provides a foundation for addressing the following strategies:

- **Strengthen the workforce system to provide a laser focus on the demand for skilled labor by Florida businesses.** CareerSource Florida has identified improving workforce system alignment with business needs as one of its three strategic priorities. A key step involves asking businesses to assess Florida's ability to produce skilled workers, an approach CareerSource Florida is piloting with a first-in-the-nation customer satisfaction index measuring employer perceptions of Florida's workforce in targeted industries. This will enable the workforce development efforts to regularly assess the skills needed to support key clusters and to identify, expand, and sustain effective programs to develop workers with these skills or to retain skilled workers in the state. Educational institutions, workforce organizations, and businesses can partner to identify current and future skill needs, design curricula, and create internship and apprenticeship opportunities. Another key step is providing workforce assistance to those workers seeking employment. For example, CareerSource Florida is providing opportunities for people to learn about available jobs as well as helping them match their skills to job



vacancies.

- **Ensure the preK-20 education system produces high-caliber graduates and provides multiple career pathways.** We must increase the number of students who advance their education and finish ready to work; expand technical education and certification programs to increase the number of workers with industry credentials; and strengthen mentoring and training for future entrepreneurs. We also must expand effective programs for encouraging Florida college graduates to remain in Florida to build their careers.
- **Provide a strong focus on STEM so that we lead the competition in preparing workers for future jobs.** Florida should expand development of high-impact and market-relevant education, training, and internship programs starting in elementary school and continuing through postsecondary programs.
- **Support regional solutions that address unique assets and needs in each part of Florida,** including currently distressed or underserved areas such as rural markets and urban core communities. We can help these areas prosper and retain their younger residents by providing greater opportunities for education, training, and jobs.

**Table 4. Florida’s New Directions – Talent Supply and Education**

Today’s Challenges	Tomorrow’s Opportunities
Close the current workforce gap.	Increase the alignment of the workforce system with business needs.
Prepare workers for future jobs.	Build a world-class pre-K to career education system that prepares students for work.
Supply workers for innovation industries.	Equip students and workers with market-relevant science and technology skills.
Support potential for all regions.	Improve access to education and training in distressed markets.





## Innovation and Economic Development: *Diversifying Florida's Economy and Expanding National and Global Markets*

### Florida's Area-Specific Strategies

9. Strengthen Florida's leadership in expanding and emerging talent and innovation clusters and help transition established clusters to serve new markets.
10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture, and help expand innovation businesses.
11. Expand the number of Florida businesses selling goods and services internationally and diversify the markets that they serve.
12. Brand and consistently market Florida as the best state for business.

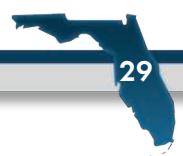
The most competitive economies are fueled by innovation, focused on key clusters and connected strategically to global markets.

### **Where We Stand**

After stunning job gains during the early part of the 2000s, the recession revealed that the engines of Florida's growth need to be retooled and expanded. The recession took a toll on nearly all major economic sectors. Between 2007 and 2010, health services and education were the only industry sectors in Florida to add jobs. The construction industry, one of the state's key drivers during much of the boom period, lost about 375,000 jobs and is now only about one-half the size of its late 2006 peak. Florida's jobs recovery began in early 2010 and has been led thus far by a resurgence in professional services such as law, engineering, architecture, and management; a return to strong growth in tourism; and continued strength in global trade, health services, and education. Manufacturing, a sector hit hard nationwide by the recession, is now expanding in Florida. Construction, the hardest hit sector in the recession, is also turning the corner.

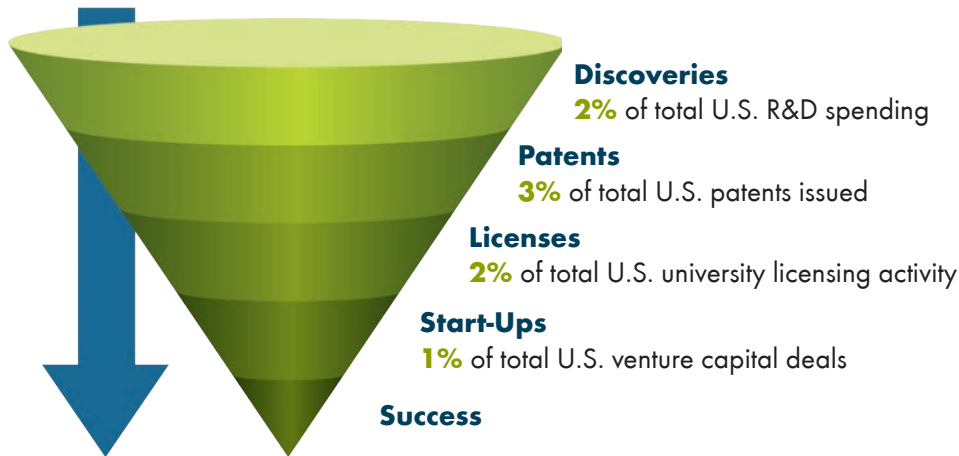
Key economic development issues facing Florida include:

- Historically, Florida's economy has been driven by agriculture, tourism, the military, and population growth, which in turn produced gains in construction, real estate, retail trade, and services. This industry mix has skewed the state's job opportunities toward lower-wage positions in the services and trade sectors. The reliance on a continued influx in population and visitors to drive overall economic growth has left Florida vulnerable to swings in the national economy.
- Florida's location near the crossroads of north/south and east/west trade lanes, transportation infrastructure, and cultural ties to Latin America and the Caribbean have made the Sunshine State an important trade and tourism gateway, and there is room to grow further.
- Florida enjoys a tremendous global brand name – primarily as a draw for visitors and retirees but not often enough as a place for business.



- Florida has had notable successes in developing new technologies, but lags behind other states in terms of innovation activity. Florida hosts nearly six percent of the total U.S. population, but accounts for between two and three percent of total U.S. activity on key measures of innovation, including research and development spending, patents, university licensing, and university startups.

**Figure 9. Fueling the Innovation Pipeline**



Source: National Science Foundation (2008); U.S. Trade and Patent Office (2011); Enterprise Florida, Inc. with Association of University Technology Managers (2011); PricewaterhouseCoopers Venture Capital Database (2011).

**Table 5. Innovation and Economic Development – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
Gross Domestic Product per Person			As of 2012, Florida had a per capita GDP of \$40,913; ranking 40 <sup>th</sup> in the U.S., reflecting its concentration of retirees and lower wage service workers.
Research and Development Spending		NA	R&D spending from all sources equals 1% of GDP – a smaller share than in other large states.
Venture Capital			Fell to \$203 million in 2012, but a fraction of the peak prior to the recession.
Business Startups			One in 11 new businesses nationally start in Florida – but business failures are high too.
Visitors			89 million out-of-state visitors per year – second only to California, and still growing.
Florida-Origin Exports			\$66B in 2012, doubled since 2005.
Employees at Foreign-Owned Firms			223,600 workers get their paychecks from foreign-owned firms.

<sup>a</sup> Since 2010.

## Best Practices

The Regional Business Plan for Tampa Bay is a comprehensive, cluster-based economic development strategy resulting from the collaboration of regional business, education, workforce, and community leaders. The plan was developed in 2011 under the leadership of the Tampa Bay Partnership and the Tampa Bay Regional Planning Council. The plan builds upon and leverages the region's existing strengths and identifies opportunities to create high-wage, sustainable job growth with emphasis on four sectors: applied medicine and human performance; high-tech electronics and instruments; business, financial, and data services; and marine and environmental initiatives. Regional leaders are now working actively on implementation through targeted industry, workforce, and foundational initiatives to support a stronger, more resilient economy. This business plan is being coordinated with the region's long-term vision, One Bay.



Innovation Gainesville is a community-wide collaborative to promote Gainesville as a leader in green and health technologies. This initiative is led by the Gainesville Area Chamber of Commerce and Council for Economic Outreach. Key incubators and projects including the Biotechnology Development Institute, the Gainesville Technology Enterprise Center and Santa Fe College Center for Emerging Technologies are credited with creating over 1,000 jobs. The Florida Innovation Hub at the University of Florida, created in 2011, is a \$13.2 million "super incubator" project and the cornerstone project of Innovation Square, a research and development park located in midtown Gainesville connecting the university and the downtown. The Hub includes 48,000 square feet of office space, laboratories, conference rooms, and classrooms; the home of the University of Florida's Office of Technology Licensing; and the University of Florida's Economic Development Administration University Center, Tech Connect. The Florida Innovation Hub was funded in part with an \$8.2 million grant from the U.S. Economic Development Administration. Innovation Gainesville plays a significant role in implementing the regional business incubators and research parks, a vital project area of the Comprehensive Economic Development Strategy developed and adopted by the North Central Florida Regional Planning Council.



## Where We Are Going

A more diverse economy will position Florida for future growth and prosperity. The following strategies will help the state diversify its economy:

- **Work with Florida's economic regions to develop a portfolio of talent and innovation clusters where Florida can be a national or global leader.** Targeted strategies are needed to:
  - » Continue to support Florida's greatest existing strengths, such as tourism.
  - » Support growing clusters, such as life sciences or trade and logistics in many parts of the state today.
  - » Nurture newer (sometimes unproven) clusters with long-range potential, such as simulation, digital media, clean energy, and marine and environmental sciences.
  - » Help transition established clusters to serve new markets, such as shifting the focus of Florida's space industry from civil launches to commercial research and transport, and developing new markets for agricultural products such as biofuels.

- Give particular focus to expanding the state’s pipeline of research, development, and entrepreneurial activity.** Florida has many effective programs for research and development, technology transfer and commercialization, business incubators, and other startup activities. These programs should be expanded, accelerated, and integrated to provide a comprehensive entrepreneurial ecosystem to move ideas to successful businesses in a rapid, high-impact manner. A critical element of this strategy is to expand access to capital for startup and growing businesses, with emphasis on angel, seed, and early stage venture capital. An example of this type of effort can be found in the work of the Institute for the Commercialization of Public Research.
- Expand Florida’s role serving global markets for goods, services, travel, and information, with particular emphasis on increasing the value of Florida exports.** Florida’s exports are driven by small businesses, particularly in manufacturing, technology, health services, and professional services. The state and regions will create, expand, and advance effective programs for businesses that already export to further expand or diversify the markets they serve, while also helping other businesses establish ongoing export capacity. An example of this type of effort can be found in the work of the Florida Export Finance Corporation.
- Strengthen Florida’s appeal to workers and businesses through branding and aggressive and consistent marketing.** It is critical that Florida’s brand highlight its strategic assets and its business friendly approach. The brand should broaden perceptions of Florida as a state in which to do business, in addition to being a place for tourists and retirees. Economic development and tourism marketing should be seamless so that every visitor to Florida is viewed as a future worker, resident, business owner, or investor.



**Table 6. Florida’s New Directions – Innovation and Economic Development**

Today’s Challenges	Tomorrow’s Opportunities
Focus on traditional industries such as agriculture, tourism, and real estate; lack of diversified industries.	Build portfolio of strong talent and innovation clusters.
Relatively small role in research, innovation, and entrepreneurial activity.	Create integrated innovation pipeline to speed ideas to market.
Untapped potential in global market.	Double Florida exports with emphasis on small to medium sized businesses.
Perception of Florida as place to visit or retire.	Brand Florida as nation’s best place for business.

## Infrastructure and Growth Leadership:

### *Modernizing Florida's Infrastructure and Growth Decisions to Support a Competitive Economy and High Quality of Life*

#### Florida's Area-Specific Strategies

13. Coordinate decision-making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce, and community development at the statewide, regional, and local levels.
14. Develop and maintain multimodal, interconnected trade and transportation systems to support a prosperous and globally competitive economy.
15. Develop and maintain a cutting-edge telecommunications infrastructure.
16. Ensure the future supply and quality of water to meet Florida's economic and quality of life goals.
17. Develop and maintain diverse, reliable, and cost effective energy sources and systems to meet Florida's economic and environmental goals.

Infrastructure investments have been a key driver of Florida's economy for centuries – from the early ports and trails to the major rail lines to the Interstate highways, telecommunications systems, airports, seaports, and spaceports today. Florida's policies and investments regarding energy, water, land use, conservation, housing, and related issues shape the state's quality of life and economic competitiveness.
















#### **Where We Stand**

Florida's infrastructure has many assets, but is under increasing pressure to meet current and future needs:

- The condition of Florida's roads and bridges is among the best in the nation, but traffic congestion continues to grow in many urbanized areas as well as on key intercity corridors. The state's 15 deepwater seaports, 19 commercial service airports, and 2 spaceports serve as gateways for domestic and international visitors, commerce, and investment – but need additional capacity and connectivity to support anticipated growth in global trade and travel.
- Use of broadband and mobile communications systems is rising across the state. Penetration rates are significantly lower in rural areas and among low-income residents, seniors, and some minority groups – raising concerns about a digital divide in future economic opportunity.
- Per capita water withdrawals from the public supply have been below the U.S. average in recent years, but there are significant concerns about the long-term availability of the water supply.
- The typical Floridian consumes less energy than the U.S. average, but the state's energy mix remains oriented toward fossil fuels. We need to ensure that Florida has the ability to meet the current and long-term energy-related needs of its growing economy.
- New development has tended to occur on the fringes of existing urbanized areas or along transportation corridors. This sprawling pattern has consumed open space and agricultural lands, encroached on sensitive environmental areas, and increased pressure on already stretched highway, energy, water, and wastewater systems. Many communities face profound decisions about where and how they want to grow, and how they can address economic development opportunities while preserving their quality of life.



**Table 7. Infrastructure and Growth Leadership – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
Highway Condition			Florida ranks among the top states in highway condition.
Urban Traffic Congestion			Hours of delay eased during the recession, but are resuming their long-term upward trend in all major urban areas and on intercity corridors.
Public Transit Use			Higher fuel prices encourage some travelers to get out of their cars, but approximately 2% use public transit as primary way to get to work.
Airport and Seaport Activity			Increasing as Florida's economy recovers and global trade and tourism expands.
Broadband Access		NA	70% of Florida residents have high-speed Internet access; access is an issue in some rural areas.
Energy Consumption per Capita		NA	Florida's per capita energy consumption is low and the state ranks among the leaders for solar energy and clean-burning natural gas electricity production.
Electricity Costs			Electricity costs are up by 44% between 2002 and 2012.
Water Consumption per Capita		NA	Conservation strategies are reducing total withdrawals per person per day.
Land Conservation		NA	27% of total land area is conserved under federal, state, or private conservation as of 2011.
Building Permits			Building permits totaled 43,384 in 2012, compared to about 114,000 per year between 1980 and 2006.

<sup>a</sup> Since 2010.

### Where We Are Going

Retooling Florida's infrastructure and the processes used to make decisions about development will enable the state to meet the demands of a global, innovation-oriented economy.

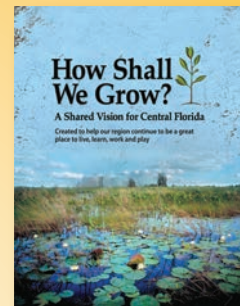
A critical strategy is the development of a more proactive, effective, and collaborative approach to making decisions about future development and infrastructure investments at the state, regional, and local levels. Today such decisions too often are fragmented among multiple agencies and processes, and are driven from the perspective of individual jurisdictions rather than the prosperity and stewardship of the state and its regions. Coordination among the agencies responsible for economic development, land use, transportation, water, waste management, energy, and community planning will advance investments that accomplish multiple goals and facilitate both economic development and quality of life.

A second set of strategies address the need to modernize and make strategic investments in infrastructure to support the state's economic vision. Although specific strategies for each form of infrastructure vary, they share several common themes:

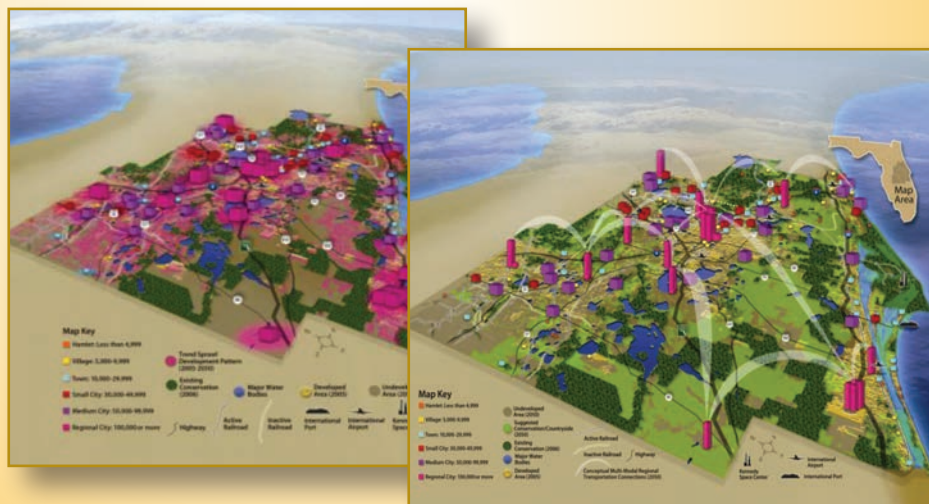
- Reducing costs.
- Improving connectivity to markets.

## Best Practice

How Shall We Grow? is a regional collaboration that produced a shared regional growth vision for Central Florida. The initiative was led by *myregion.org*, a public/private/civic partnership, with support from the region's two regional planning councils, five metropolitan planning organizations, the Florida Department of Transportation, the former Florida Department of Community Affairs, and the Central Florida Partnership. The vision focused on the question of how Central Florida can develop a globally competitive economy and maintain a high quality of life as its population nearly doubles over the next 50 years. The visioning process involved more than 20,000 Central Floridians, and resulted in a regional vision for future growth and development, as illustrated in the two maps below. The left map shows anticipated development, conservation land, and infrastructure in 2050 assuming current development trends continue; the right map shows an alternative vision assuming greater regional collaboration emphasizing the "4 Cs" of conservation, countryside, centers, and corridors. The process also produced a voluntary regional growth compact signed by representatives of seven counties and 86 cities, and led to the creation of the Central Florida



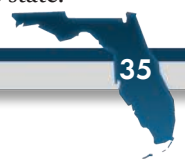
Congress of Regional Leaders to guide future regional decisions. Today, Central Florida's city and county governments, businesses, and civic organizations are implementing this vision. Early priorities have included creation of a regional water strategy and major transportation investments including the SunRail commuter rail system, the Wekiva Parkway, and the Cape Canaveral Spaceport.



- Providing additional capacity to accommodate growth in demand.
- Providing additional choices to businesses and consumers.
- Ensuring investments are consistent with business needs and compatible with the communities and environment in which they are located.

The state should develop future infrastructure in a way that creates new talent and innovation clusters – a next generation vehicle or energy source developed in Florida could meet local needs while also providing expertise and products Florida can sell to other states. Additional strategies include:

- **Invest in an interconnected, multimodal trade transportation system that links Florida's regions and enables Florida's businesses to serve global markets.** These include seaports, airports, spaceports, railways, major truck corridors, and integrated logistics and distribution centers. The state should evaluate alternative approaches to provide capacity for future growth, including use of technology, express highway lanes, expanded rail and transit options, and development of parallel or new corridors in some parts of the state.



- **Facilitate statewide access to state of the art telecommunications,** Internet, and mobile systems so advanced communications systems reach all parts of Florida.
- **Ensure an adequate clean water supply to sustain development and quality of life.** A statewide water strategy will enable Florida to balance residential, agricultural, and industrial uses. This strategy should address the needs of all regions using strategies such as alternative sources and storage, waste management, reclaimed water, and enhanced conservation.
- **Develop and maintain diverse, reliable, and cost effective energy sources and systems.** A statewide energy strategy will enable Florida to facilitate alternative energy sources, reduce dependence on foreign oil, and provide for future economic growth.

### Best Practice

Heartland 2060 is a grass-roots long-range regional visioning initiative that will develop a 50-year vision for a seven-county region in non-coastal south central Florida. An early focus has been on the region’s economic future, including strategies to diversify the region’s agricultural base while growing industries such as renewable energy and trade and logistics. Early products will include an economic development strategy for alternative fuels, an affordable housing strategy, and a five-year strategic action plan for the region. Longer-term products will include a resilient development strategy including future infrastructure investments coordinated to minimize impacts to the natural environmental systems. Based upon an intense year of economic engagement, the region will have a new Comprehensive Economic Development Strategy, a marketing plan through state support for Florida’s Heartland Regional Economic Development Initiative, broadband deployment for the rural counties, and comprehensive broadband planning for the urban county. *Heartland 2060* has a consortium of 12 regional partners led by the Central Florida Regional Planning Council with support from local, state, and federal agencies.



**Table 8. Florida’s New Directions – Infrastructure and Growth Leadership**

Today’s Challenges	Tomorrow’s Opportunities
Fragmented decision-making process.	Coordinate decision-making and investments with long-term focus on Florida’s economy and quality of life.
Increasing highway congestion and need for greater capacity in rail, seaports, and airports.	Create interconnected, multimodal trade and transportation systems.
Limited connectivity to rural Florida.	Improve transportation and broadband connections and access.
Increasing pressure on water supply and quality.	Develop and implement integrated statewide water strategy.
Increasing energy demand and costs.	Develop diverse, reliable, and cost effective energy sources.



## Business Climate and Competitiveness: *Developing the Nation's Leading Business Climate and Customer-Focused Support Services*

### Florida's Area-Specific Strategies

18. Revise permitting, development, and other regulatory processes to meet changing business needs and to provide a predictable legal and regulatory environment.
19. Ensure state, regional, and local agencies provide collaborative, seamless, consistent, and timely customer service to businesses and workers.
20. Reduce barriers to small/minority business and entrepreneurial growth.
21. Expand opportunities for access to capital for businesses throughout their life-cycle.
22. Work with industry to ensure property and health insurance rates are competitive with other large states.
23. Develop a government revenue structure that encourages business growth and development.

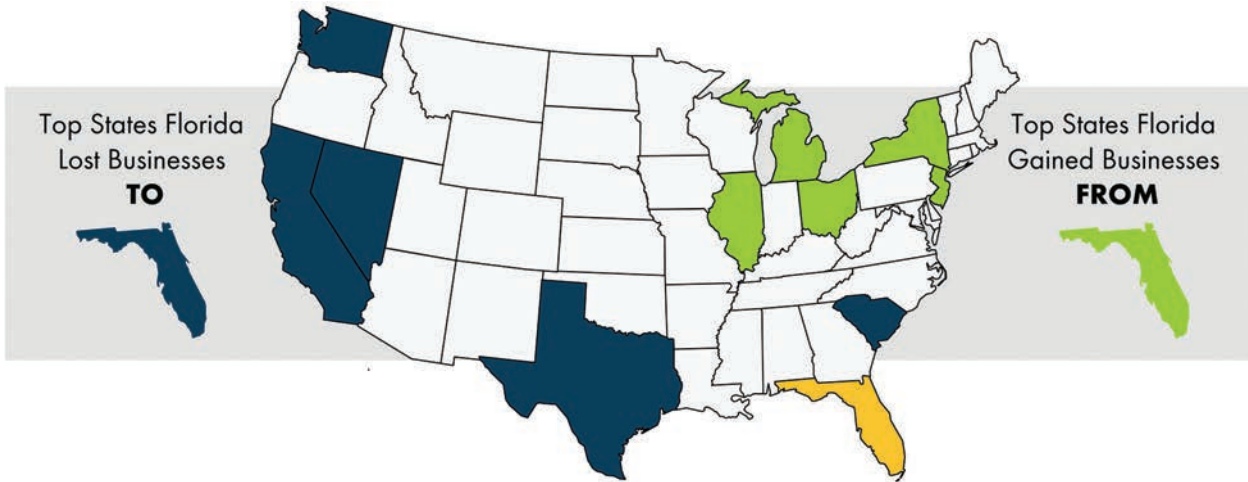
While focusing on key clusters is at the core of Florida's economic development strategy, the state's business climate must be healthy and competitive for all businesses. This means that taxes and other business costs should be competitive; regulatory and business support systems should be efficient and reliable; and capital, technology, and other resources should be readily available.

### **Where We Stand**

A fundamental measure of a state's business climate is whether the number of businesses in a state grows over time. During peak expansion period from 2001 to 2008, Florida added about 25,000 businesses per year. However, the state lost about 27,000 businesses between 2008 and 2010. In 2011, Florida created more businesses than all but one state. Florida ranked 4<sup>th</sup> among the states in 2011 for the net number of business relocations – generally gaining businesses from the Northeast and Midwest and losing businesses to other states in the South and West.



**Figure 10. Business Relocations to and from Florida**












Source: Dun & Bradstreet data provided by Florida Chamber Foundation, 2011.

Key business climate challenges include:

- Frequent and unpredictable changes in legal and regulatory requirements, including those imposed by the courts, make it difficult for Florida businesses to plan. Development review and approval processes can be cumbersome, although recent growth management reforms streamlined the process. The time involved in securing approvals for major projects can be costly.
- The requirements involved in opening businesses and receiving licenses and permits change frequently and are increasingly complex. Many businesses now operate on a regional scale, and may need to navigate licensing and permitting processes of multiple counties and cities, in addition to multiple state agencies.
- Small businesses with fewer than 500 employees account for 99 percent of all businesses and 76 percent of all private sector jobs in Florida (excluding self-employed individuals). Business climate issues often are magnified for small businesses that do not have the resources to devote to completing paperwork, learning new processes, or recruiting staff.
- Capital remains constrained, particularly for small businesses. Seed capital investments in early stage businesses are a fraction of the levels prior to the recession. Traditional forms of lending and equity investments also remain constrained. The high level of foreclosures and the large number of surplus properties continue to impact private capital markets.
- While Florida's wage rates remain close to the U.S. average, the state has experienced sharp increases in costs for health insurance, property insurance, property taxes, and other business costs. While many of these costs cannot be directly managed by the public sector, public policies and regulations do play a role in influencing certain costs. An example is workers' compensation, where successful legislative reforms dropped Florida from the nation's 2<sup>nd</sup> highest premiums in 1998 to the 10<sup>th</sup> lowest in 2010.
- Florida's state and local governments did not significantly restructure tax policies during the recession, so many measures of the tax burden increased as Florida's economy shrank. However, Florida's overall business tax climate is rated as one of the five strongest in the nation. Local governments are increasingly relying on transaction and impact fees as sources of revenue, further adding to the cost of doing business. Many of these fees are based on real estate transactions and new development, a model that may not be sustainable over time.

**Table 9. Business Climate and Competitiveness – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
Health Insurance Costs			Average cost per employee doubled between 2000 and 2011.
Legal System			Florida ranks #41 in the U.S. for corporate attorneys' perceptions of the state's tort liability system.
Tax Burden		NA	Floridians paid 9% of personal income as state and local taxes in 2010 – higher than in 2000, but below the national average.
Business Tax Climate			Tax Foundation ranks Florida's as 5 <sup>th</sup> best in the nation.
Business Friendly Environment			Chief Executive Magazine ranks Florida as the 2 <sup>nd</sup> best state in which to do business in 2012, up from 6 <sup>th</sup> in 2010.

<sup>a</sup> Since 2010.

### Best Practice

The Port of Jacksonville is pursuing a major dredging project to deepen its channels and accommodate larger ships. The permitting process for such projects can be a long one involving multiple agencies. To expedite permitting for a dredging disposal site nearby the port, the Florida Department of Environmental Protection (DEP) brought together key local, state, and federal agencies to reconcile requirements by following process improvement techniques that the DEP, until this time, had only used internally. The improvement in coordination and communication between the agencies saved time, and helped yield a compromise that allowed a permit to be issued for the dredging site, an instrumental step towards preparing JAXPORT for increased global trade.



### Where We Are Going

Florida's business climate will have to adapt to support a global, innovation-oriented economy. The state should work with regional and local agencies and the private sector to implement the following strategies:

- **Reform licensing, permitting, development review, and other regulatory processes** to make them simple, efficient, predictable, and where appropriate, consistent across agencies and jurisdictions. These reforms should reinforce the purpose of regulations to protect public health and safety, strengthen communities, and preserve the environment – while enabling sound projects to move from concept to reality quickly. These reforms also should reduce the costs of regulation on businesses.

- **Promote simplified, timely, customer focused services** to businesses at the state, regional, and local levels. Agencies should look for opportunities to share information, use common forms and web sites, and consolidate processes to respond quickly to business needs and opportunities.
- **Provide targeted support to small and minority-owned businesses** by encouraging incubators, entrepreneurial centers, and other small business support systems; expanding effective programs for mentoring, networking, and access to capital; simplifying business support processes; and encouraging small business opportunities in state and local procurement processes.
- **Improve business access to capital** by adopting policies that encourage capital investment in businesses, particularly startups; marketing Florida to venture capitalists and other potential investors; and working with financial institutions to restore the real estate sector.
- **Help ensure property insurance, health insurance, and other business costs rates are competitive** with other large states and do not impede business decisions to locate or expand in Florida. The state should work with businesses and the insurance industry to develop approaches to slowing the rate of growth in these costs and bringing them in line with those in peer states. These approaches must address short-term competitiveness gaps as well long-range uncertainties, including the state's heavy financial exposure to a catastrophic storm.
- **Develop a competitive state and local government revenue structure** that reduces the costs of taxes and fees on businesses. At the same time, the state and local governments should continue efforts to improve the efficiency of their operations.

**Table 10. Florida's New Directions – Business Climate and Competitiveness**

Today's Challenges	Tomorrow's Opportunities
Complex, frequently changing state and local business regulations.	Modernize regulatory systems to reflect a global, innovation-oriented economy.
Multiple state, regional, and local agencies involved in business transactions.	Provide seamless, efficient customer service for businesses.
Reliance on small businesses for growth in many industries.	Reduce barriers to growth of small and minority businesses.
Limited capital availability following recession and real estate collapse.	Expand access to capital for businesses at all stages.
Increasing property and health insurance costs.	Work with industry to slow rate of growth and bring in line with other large states.
Increasing overall tax and transaction fee burden for many businesses.	Develop a government revenue structure that encourages business growth.



## Civic and Governance Systems:

### *Creating Strong Partnerships to Meet Florida's Economic Development Goals*

#### Florida's Area-Specific Strategies

24. Support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life goals.
25. Improve the efficiency and effectiveness of government agencies at all levels.
26. Invest in strategic statewide and regional economic development priorities.

The majority of Florida's jobs are created by the private sector. Civic and government organizations play essential roles in setting policy, delivering services, and supporting markets. Florida's competitiveness in all other pillars is tied to whether the state's civic and governance systems function in an efficient, predictable, and proactive manner.

#### **Where We Stand**

To increase our competitiveness, Florida's civic and governance systems must continue to adapt to changes in the state's economy.

- Most economic development opportunities today require collaboration among multiple agencies at multiple levels of geography. Nearly one in five Florida residents commute across a county line to get to work and an increasing number of supply chains and distribution networks cross traditional city and county lines. The businesses that are driving the future of Florida's economy function on a regional or global scale, while Florida's government structure is primarily organized at the local or statewide levels. Moreover, many of the key strategies identified as part of this plan – talent and innovation clusters, infrastructure investments, and major development decisions – have impacts that cut across jurisdictional lines. Regional solutions can be difficult to implement due to the wide range of geographic boundaries, planning requirements, regulations, and funding sources across existing entities, including how each Florida state agency defines regions.
- Over the last five years, state and local governments have experienced declining revenues and increasing demand for services. The state is now experiencing a budget surplus. Florida has emerged from the recession in stronger fiscal health than other large states such as California and Illinois. However, the state and many local governments continue to restrict spending in order to meet budget constraints. Florida's government employment is one of the leanest in the nation. Fiscal pressures remain for both the state and local governments. Many agencies and localities will continue to face difficult decisions about how to provide essential services and invest in the future with anticipated revenues.

The civic and nonprofit sector is filling some of the gaps not currently met by government agencies or the private sector, but Florida still ranks comparatively low in terms of the relative size of the nonprofit sector, volunteer activities, and charitable contributions from its residents. A transient population and large number of retirees, whose careers and professional networks are tied to other regions, historically have limited community involvement. Greater engagement of Florida residents in civic activities may be an untapped resource for the future.



**Figure 11. Florida’s Complex Boundaries**



**A Partial Listing of Florida Government Entities**

- 411** Municipalities
- 67** Counties
- 27** State Agencies
- 5** Public/Private Partnerships

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- 787 Community Development Special Districts
- 115 Economic Development Organizations
- 50 Convention and Visitors Bureaus
- 28 Fixed Route Transit Systems
- 26 Metropolitan Planning Organizations
- 24 Regional Workforce Boards
- 11 Regional Planning Councils
- 8 Economic Regions
- 5 Water Management Districts

Numbers current as of June 2013

**Table 11. Civic and Governance Systems – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
Regional Partnerships			Increase in examples of voluntary regional collaboration, but the system remains fragmented.
Voter Turnout			Florida’s swing state status keeps interest levels high: 64% of all eligible voters cast a ballot in 2012, making Florida the leader among large states.
Volunteer Activities		NA	20% of Florida taxpayers claim a charitable deduction and 23% of Florida residents perform unpaid volunteer activities – both below the national average as well as pre-recession levels.
Nonprofit Organizations			53% increase in number of registered nonprofit organizations between 2000 and 2010, mirroring the national trend.

<sup>a</sup> Since 2010.

## Where We Are Going

Strategic partnerships and investments are critical to Florida's future. Key strategies include the following:

- **Develop strategic partnerships at both the statewide and regional levels** to implement this plan and move Florida to a more prosperous future.
  - » At the statewide level, Florida's state agencies will have to function in a highly efficient, integrated manner to work toward both short- and long-term economic development goals, as well as to respond quickly to specific economic development opportunities. The state should continue to work with private and civic organizations to achieve the shared economic vision, building on the collaboration initiated to develop this plan.
  - » At the regional level, Florida has the opportunity to build on and sustain effective partnerships of local governments, economic development and workforce organizations, businesses, and other stakeholders to define and implement regional economic development strategies. The state should encourage and support regional visioning and collaboration activities, viewing Florida's regions as incubators for Florida's future. Regional targeted industry initiatives, the Comprehensive Economic Development Strategies, CareerSource Florida's "Florida Eight" regional collaboration initiative, and long-term regional visioning processes around Florida illustrate how partners can work together to address regional economic goals.
- **Improve the efficiency and effectiveness of government agencies at all levels.** State, regional, and local governments should continue to increase the efficiency of their operations to maximize use of taxpayer dollars, focus available resources in the most strategic areas, and respond to customer needs. Regions should expand partnerships among existing entities, or seek their consolidation to improve efficiency and customer service.
- **Give priority to strategic investments to attain the state's economic vision and support regional visions.** Florida's future prosperity requires targeted funding for economic development and marketing as well as focused investments in workforce, education, research and development, infrastructure, community development, and related areas. The state and most regional and local economic development organizations rely primarily on annual budget appropriations and business contributions to fund economic development activities and related investments. The state should work with regional and local partners to define the key elements of a long-term investment strategy to strengthen Florida's economic pillars and support targeted statewide and regional talent and innovation clusters.



### Best Practices

The consolidation of the City of Jacksonville and Duval County in 1968 set the stage for regional cooperation in Northeast Florida that is continuing to reap benefits for the region’s governments and businesses. Northeast Florida today is the only region of the state whose economic region, regional planning council, and regional economic development organization share the same boundaries. The JAXUSA Partnership is a regional economic development organization affiliated with the Jacksonville Regional Chamber of Commerce and seven county governments. The Partnership, along with the Northeast Florida Regional Council, developed the Innovate Northeast Florida initiative that targets future industry clusters and workforce needs. This initiative is coordinated with the 50-year First Coast Vision being developed by the Regional Community Institute for the Northeast Florida Regional Council. The strategies from Innovate Northeast Florida and First Coast Vision are being incorporated into the update to the region’s Strategic Regional Policy Plan and its Comprehensive Economic Development Strategy.



**Table 12. Florida’s New Directions – Civic and Governance Systems**

Today’s Challenges	Tomorrow’s Opportunities
Multiple state, regional, and local agencies involved in economic development decisions with different boundaries.	Develop strong statewide and regional economic development partnerships.
Constrained public sector revenues and increasing demand for services.	Improve the efficiency and effectiveness of government agencies.
Limited levels of reliable funding for economic development.	Invest in strategic economic development priorities.



## Quality of Life and Quality Places:

*Providing the Nation's Leading Communities of Choice to Live, Learn, Work, and Play*

### Florida's Area-Specific Strategies

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27. Create and sustain vibrant, safe, and healthy communities that attract workers, residents, businesses, and visitors.
28. Ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions.
29. Promote, develop, protect, and leverage Florida's natural, art, and cultural assets in a sustainable manner.

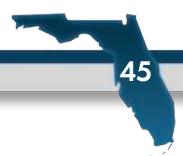
Businesses and talent are attracted to regions and states with a high quality of life and quality places to live, learn, work, and play. Further developing, promoting, and protecting quality places, including both built communities and natural systems, will help Florida remain attractive to workers, retirees, and visitors alike.

### **Where We Stand**

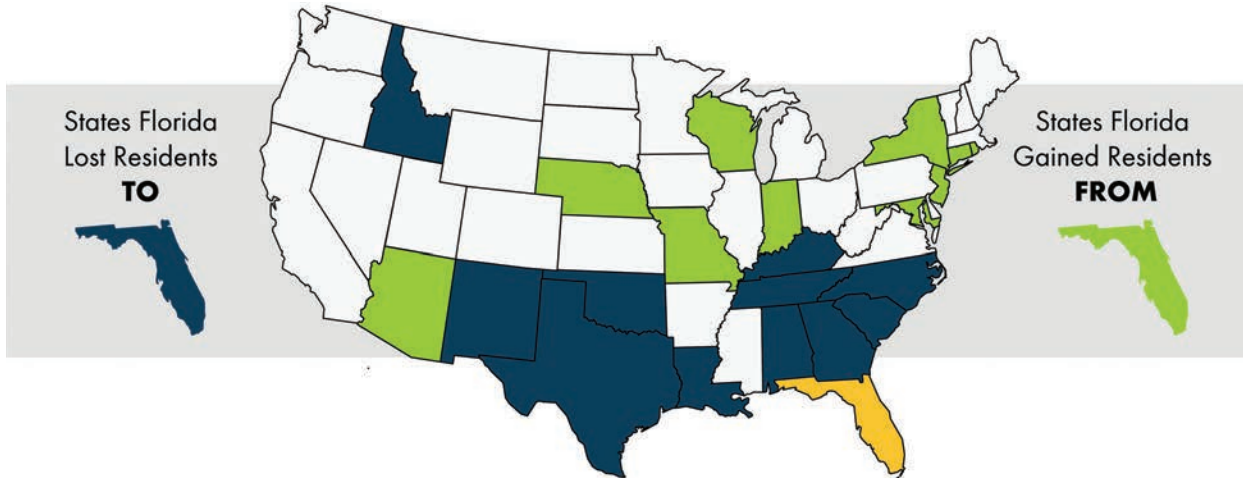
Perhaps the most fundamental measure of a state's quality of life is whether it can attract and retain residents. Florida currently ranks 2<sup>nd</sup> in the U.S. for net domestic migration (people moving to Florida less people moving from Florida to other states). Florida continues to be a draw to residents in many Northeast and Midwest states, but has begun to lose residents to other states in the Southeast and Southwest.

The Sunshine State remains an attractive place to live and visit. Florida's quality of life will be improved as the state addresses employment, wages, and housing. As the state prepares for its next wave of growth and development, it will be critical to maintain the balance between quality of life and economic competitiveness. Key issues include:

- The quality of Florida's communities is a critical draw to residents, workers, students, and visitors. Affordable housing became scarce during the last expansion, driving growth to suburban or exurban areas along transportation corridors. Younger workers and empty nesters increasingly are looking for mixed-use communities where people can live, work, learn, shop, and play in close proximity. Many families prefer suburban development with quality schools, affordable and accessible health services, and attractive parks. Older residents increasingly are looking for full service communities where they can age in place. All of these options are important to Florida's future.
- Florida's natural environment is the source of much of Florida's economic strength. And it is one of the most diverse yet fragile in the nation. Past development has encroached on or negatively affected sensitive environmental lands and waters.
- Some of Florida's well-known art, cultural, and natural resources are at risk from overuse. There are others that are not well known and marketed to maximize their economic and cultural value.



**Figure 12. Domestic Migration between Florida and Other States**  
2011



Source: U.S. Department of Commerce, Bureau of the Census.

**Table 13. Quality of Life and Quality Places – Key Indicators to Watch**

What Matters	Desired Results	Actual Results <sup>a</sup>	How We Are Doing
Net Domestic Migration			Migration from other states is positive again after the hit during the recession; Florida ranked 2 <sup>nd</sup> among the states in 2012.
Housing Affordability			Prices are down from pre-recession highs, but 36% of all homeowners spend more than 30% of income on housing costs.
Poverty Rate			One in six residents earns less than the poverty level.
Healthy Infants			9% of newborns are low weight, slightly higher than national average.
Healthy Children			More than one-third of children in grades 1, 3, and 6 are considered to be overweight.
Crime			Violent crime rate has dropped over past decade, although still above national average.

<sup>a</sup> Since 2010.

## Best Practices

Designated a public square by the Spanish in 1813, Seville Square has been the center of the downtown Pensacola community for 200 years. Since the 1960s, active efforts to restore the square have helped create a thriving district that attracts visitors and provides Pensacola with a pedestrian-oriented gathering place for shopping and entertainment. The square, which had deteriorated into a poor physical condition, is now a strong source of jobs and tax revenues. As more people seek active downtown areas for living and recreation, Seville Square has become an important asset for attracting talent and economic development. The location of the Institute for Human and Machine Cognition near the edge of Seville Square is reflective of the future potential of the area.



Trails and greenways are fueling the transformation of many Florida communities. No place better exemplifies this fact than the City of Dunedin in Pinellas County. Dunedin is bisected by the Fred Marquis Pinellas Trail, a 42-mile paved corridor designed for walkers, bicyclists, and rollerbladers. Dunedin has led the way by linking its downtown Main Street area to the trail. On a given weekend, 1,200 to 1,400 people will go through the downtown area via the trail, often stopping at restaurants or coffee shops. Downtown business occupancy rates climbed from 30 percent to over 95 percent following establishment of the trail. The City has embraced the trail as an integrated component of its community development strategy.



## How We Get There

Florida's quality of life and quality places are critical drivers of its future economy, not merely a potential product of strong economic growth. Florida's communities and natural resources can help the state to stand out in the global competition for talent, visitors, and investment. To bolster our ability to attract businesses and potential residents, Florida needs to make thoughtful development decisions and pursue the following strategies:

- Create and support communities of choice by encouraging quality growth and development to provide healthy, safe, welcoming places for residents, workers, students, and visitors. Florida's diverse population requires a range of safe and stable communities with affordable housing and easy access to quality schools, shopping, health services, cultural amenities, parks, social services, and other resources. Well-defined cities, towns, and villages provide fertile ground for economic development because of good transportation networks, dense infrastructure, close proximity of employees to workplaces, high density of customers and support businesses, and proximity to cultural, recreational, and educational opportunities.
- Make economic development decisions that also enhance or preserve Florida's communities and environment. This will require closer integration of economic development planning and decisions with community development and environmental stewardship, so that public investments support multiple goals.
- Encourage people to live in or visit Florida by protecting and marketing our environment and cultural assets.

**Table 14. Florida’s New Directions – Quality of Life and Quality Places**

Today’s Challenges	Tomorrow’s Opportunities
Increasing competition for skilled workers, students, retirees, and visitors from other regions.	Encourage quality growth and development in Florida’s communities that provide attractive choices for all ages.
Impacts of growth and development on Florida’s communities and natural systems.	Ensure economic development decisions protect and enhance Florida’s communities and environment.
Maximizing the value of Florida’s unique cultural and natural resources.	Promote and protect distinctive places centered on Florida’s unique assets.



Photo courtesy of [www.seefloridago.com](http://www.seefloridago.com).



# Implementation

A strong focus on implementation is needed to achieve Florida's economic vision. The following principles are critical for the implementation of this plan:

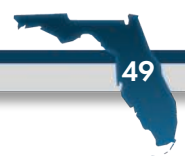
- Continued strong leadership from the Governor, Cabinet, and Legislature for the state's economic vision and specific implementation priorities.
- Effective and sustained statewide, regional, and local partnerships among public, private, and civic organizations to implement this plan and work toward the state's vision.
- Sufficient, consistent, and reliable public and private investments in statewide and regional economic development priorities.
- Sufficient leadership and technical capacity, data, and tools for effective state, regional, and local economic development programs, and organizations.
- A robust, ongoing process to monitor progress toward the state's vision and refine the plan as needed.

The Executive Office of the Governor will take the lead in ensuring that the executive agencies' priorities and programs align with and support the strategies in this plan. It is important to the success of this plan that state funding priorities, staffing decisions, program changes, and agency performance monitoring activities be tied to plan implementation.

The Florida Department of Economic Opportunity will serve as the lead agency for plan implementation, working with Enterprise Florida, CareerSource Florida, VISIT FLORIDA, Space Florida, other state agencies and partnerships, and regional and local partners. DEO will initiate plan implementation with the following activities:

- Work with Enterprise Florida and CareerSource Florida to update all three organizations' business plans to identify responsibilities for plan implementation, including specific actions and performance measures.
- Coordinate with other state-level agencies and organizations through the designated Economic Development Liaisons to identify each agency's role in supporting plan implementation and to align their policies, plans, and programs, including annual budget priorities, with the state's economic vision.
- Coordinate with county and city governments, regional and local economic development organizations, regional planning councils, regional workforce boards, and other partners to encourage each region and community of the state to align its activities with the state's economic vision and this strategic plan.
- Define specific performance measures and a statewide system to track progress toward the vision, goals, and objectives of this plan.
- Report on progress toward plan implementation as part of its annual report to the Governor and Legislature.

DEO will review the plan annually and conduct a comprehensive update at least once every five years in coordination with statewide partners and stakeholders.



## Critical Actions

To initiate plan implementation, critical actions are needed in the following areas:

1. Agencies should align their policies, plans, and programs, including annual budget priorities, with this plan.
2. The Legislature should consider using this plan as a foundation for state budget and appropriations priorities for Executive and Cabinet agencies.
3. The Florida Department of Economic Opportunity, working with Enterprise Florida and CareerSource Florida, will establish a statewide program to identify existing and emerging regional talent and innovation clusters, and to strengthen Florida's leadership in these clusters through collaborative activities among public and private partners.
4. The Florida Department of Economic Opportunity, working with Enterprise Florida and CareerSource Florida, will encourage and support effective regional partnerships to develop short- and long-term strategies for job creation and economic transformation.
5. The Florida Department of Economic Opportunity will work with Enterprise Florida, CareerSource Florida, the Florida Department of Transportation, and other agencies and partners to create a comprehensive global business development strategy for Florida.
6. CareerSource Florida will continue its initiative to develop Florida's talent supply chain, working with public and private education, workforce, and economic development partners to align resources and coordinate activities to focus on current and anticipated business demand for skilled labor.
7. The Department of Economic Opportunity will continue to work with state, regional, and local agencies to promote collaborative decision-making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce, and community development at the statewide, regional, and local levels.
8. The Florida Department of Economic Opportunity will work with other state agencies, regional entities, and local governments to document existing permitting, development, and other regulatory processes and to identify specific actions needed to provide a more consistent and predictable legal and regulatory environment.
9. The Florida Department of Economic Opportunity will work with other state agencies, regional entities, and local governments to develop and implement state policies to sustain a vibrant quality of life that attracts workers, businesses, residents, and visitors.
10. The Florida Department of Economic Opportunity, Florida Department of Environmental Protection, and Florida Department of Transportation will initiate a statewide process to develop an integrated statewide vision for addressing economic development, land use, infrastructure, environmental stewardship, talent development, and community development over a 50-year period.

## Call to Action

This plan is the first of its kind. Throughout the development phase of this process, including regional workshops, targeted forums, and public input sessions, it was clear that this plan is Florida's plan, from start to finish. You, the stakeholders, worked tirelessly to build this framework, and you should be proud of the quality product you have produced. The recommendations are solid, built on consensus, and backed by data and best practices.

Our work together is not done. We must keep up the momentum to make these goals a reality, and we all have a part to play. No single person or entity can move the needle toward progress, and it will not happen overnight. To successfully become a national model for business climate, job creation, competitiveness, and quality of life requires that we all commit to reevaluate the way we operate. Cooperation and collaboration are key to making the next five years really count.

The primary purpose of this plan is to align public and private entities around a common vision. This requires strong, sustained leadership over the next five years and beyond. Developing an integrated statewide vision for addressing economic development, land use, infrastructure, environmental stewardship, talent development, and community development will take ongoing efforts and teamwork from a dedicated base of stakeholders – you.

We want to hear from you about how your organization is aligning with this plan and encourage you to share proven successes and best practices with the Department of Economic Opportunity. Visit [www.floridajobs.org/FL5yrPlan](http://www.floridajobs.org/FL5yrPlan) to see examples of how your peers have developed collaborative approaches designed to set Florida in the right direction and to submit your own. Here you can also access best practices, toolkits, research reports, and other useful information.

Staff at DEO is available to assist you in the alignment process if you have questions. Please call (850) 717-8960 or e-mail [FL5yrPlan@deo.myflorida.com](mailto:FL5yrPlan@deo.myflorida.com) for more information.



## Glossary of Key Terms

**Best practice** – A method or technique that serves as a good model.

**Collaborative Labs at St. Petersburg College** – A one-of-a-kind, high-tech meeting environment specifically designed to help organizations achieve breakthrough results in their planning efforts. For more information, please visit [www.collaborativelabs.com](http://www.collaborativelabs.com).

**Comprehensive Economic Development Strategy (CEDS)** – A plan designed to guide the economic growth of a region by identifying regional goals and specific programs and projects to accomplish these goals. CEDS are developed for economic development districts designated by the U.S. Department of Commerce, Economic Development Administration. In Florida, these districts correspond to the boundaries of the regional planning councils. The CEDS must be the result of a continuing economic development planning process, developed with broad based and diverse community participation, and updated every five years.

**Community development special districts** – A local unit of special-purpose government, the boundaries of which are contained wholly within a single county; the governing head of which is a body created, organized, constituted, and authorized to function specifically for the delivery of urban community development services.

**Convention and visitors bureau** – A destination marketing organization that promotes a town, city, county, or region to attract visitors.

**Cross-cutting strategies** – Strategies in the plan that would impact more than one of the Six Pillars.

**Economic Development Liaison** – Statutorily appointed high-level staff members with a general knowledge of the state's permitting and other regulatory functions who serve as their agency's primary point of contact for the Governor's Office and the DEO. They work closely with other agency liaisons to provide for statewide collaborative responses to economic development issues, align agency work with the *Florida Strategic Plan for Economic Development*, resolve interagency conflicts, expedite project reviews, and respond promptly and effectively to issues and problems important to the economic development of Florida.

**Economic region** – Broad areas defined by activity patterns such as commuting flows, shopping habits, supply chains, and distribution networks; generally, the scale at which economic activity is organized.

**Global hub** – A region that plays a globally significant role in areas such as trade, tourism, talent, and investment.

**Goal** – A long-term end toward which programs and services are ultimately directed; broad, primary expectations as a result of a plan.

**Megaregion** – A network of multiple metropolitan regions sharing common economic clusters, environmental systems, infrastructure, and culture.

**Metric** – A measure that records a directly observable value used to assess progress towards reaching objectives.

**Metropolitan planning organizations (MPO)** – An organization made up of local elected and appointed officials responsible for developing, in cooperation with the state, transportation plans and programs in metropolitan areas containing 50,000 or more residents. MPOs are responsible for the planning of transportation facilities functioning as an intermodal transportation system and the coordination of transportation planning and funding decisions. There are 26 MPOs in Florida today.



**Mission** – An official statement of the aims and objectives for a business or other organization; varies by entity.

**Multi-state partnerships** – Partnerships between multiple states to accomplish common goals.

**Objectives** – A statement that reflects what one's efforts and actions are intended to attain or accomplish; observable, realistic, and measurable outcomes or results to be achieved within a specific timeframe.

**Per capita** – Per person.

**PreK-20** – Pre-kindergarten to graduate school and career education.

**Public-private partnerships (P3s)** – A hybrid organization formed and supported by both the public and private sector. For example, the Department of Economic Opportunity's P3s include Enterprise Florida, Inc., CareerSource Florida, and VISIT FLORIDA.

**Regional planning councils (RPC)** – Quasi-governmental organizations that are designated by Ch. 186, Florida Statutes, to address problems and plan solutions that are of greater-than-local concern or scope, and are to be recognized by local governments as one of the means to provide input into state policy development. RPCs are designated by the U.S. Department of Commerce's Economic Development Administration as economic development districts that are charged with developing Comprehensive Economic Development Strategies (CEDs) to cover their regions. There are 11 RPCs in Florida today.

**Regional workforce boards** – Regional entities designated to carry out workforce-related activities, such as employment services for jobseekers and training programs for workers and employers. The workforce boards serve as the primary service providers for the use of federal workforce investment funds. Florida has 24 regional workforce boards today.

**Six Pillars of Florida's Future Economy™** – The planning framework developed by the Florida Chamber Foundation that identifies the key drivers of Florida's future economy, using common language and indicators to facilitate partner collaboration. The Six Pillars also has been adopted by the Florida Association of Counties, the 11 regional planning councils in their role as federal economic development districts, regional partnerships, and individual counties across the state.

**Stakeholder** – A person or group that has an investment, share, or interest in something. In the case of this plan, the term stakeholders refers to the business community, local and regional economic development organizations, regional planning councils, state and local government agencies, state and local elected officials, educators, health care providers, environmental groups, the general public, and others.

**STEM** – Science, technology, engineering, and mathematics.

**Strategy** – A plan or method chosen to bring about a desired future, such as achievement of a goal.

**Tactics** – Detailed actions by which a strategy is carried out.

**Talent and innovation clusters** – Geographic concentrations of interconnected businesses, skilled labor, suppliers, service providers, and other institutions in a particular field. Firms and workers in a cluster draw competitive advantage from their proximity to partners and competitors and a shared base of sophisticated knowledge about their field.

**Technology transfer** – The process of moving scientific findings or a new technology from its creator or researcher to another entity for the purpose of further development or commercialization.

**Vision** – An aspirational description of what we want to achieve in the future.



## Acknowledgments

The planning team wishes to thank the following organizations for their significant contributions to the plan development through participating in the plan leadership team or hosting or providing staff support for our workshops and forums:

### Executive Office of the Governor

Enterprise Florida, Inc.	Florida Department of Transportation
CareerSource Florida	Florida Department of Economic Opportunity
Florida's Regional Planning Councils	Florida Regional Councils Association
Cambridge Systematics, Inc.	Collaborative Labs of St. Petersburg College
Florida Chamber of Commerce	Opportunity Florida
Florida Association of Counties	Florida League of Cities
Florida Department of Management Services	Florida Association for Community Action

The plan and its appendices were crafted with the help and support of the following individuals who prepared tactics, metrics, and data; identified, contributed, and analyzed best practices; organized, staffed, and facilitated workshops and listening sessions; wrote plan chapters and content; reviewed and edited plan content; and helped with their publication.

Those with **names in bold** traveled across the state to facilitate and support collaborative workshops.

Adam Henry, EFI • Adrian Grant, CSF • Alan Gray, WFRPC • Alan Hyman, D5 DOT • **Ana Richmond, DEO** • Andra Cornelius, CSF • Anne Wakeman, Cambridge Systematics • **Avera Wynne, TBRPC** • **Barbara Foster, DEO** • Belinda Chason, DOE • Ben Wolf, DEO • Beth Frost, DEO • **Beth Walker, DEO** • Bill Killingsworth, DEO • Billie Joyce Pugh, DEO • **Brady Smith, TBRPC** • **Branner Stewart, Cambridge Systematics** • **Brenda Winningham, DEO** • Brian Teeple, NEFRC • **Brian Watts, DOT** • **Bruce Ballister, ARPC** • Burt Von Hoff, DEO • Carolyn Gosselin, DEO • Carolyn McGriff, DEO • Cathy Forester, SJWMD • Chad Poppell, DEO • Charles Blume, ARPC • Cheryl Gonzalez, DMS • Chris Hart, CSF • Christie Burrus, DOS • Christopher Campbell, DMS • Damon Steffen, DEO • Darrick McGhee, DEO • David Arnold, FFWCC • David Foote, Cambridge Systematics • David Rathke, SWFWMD • Deborah Hunt, D7 DOT • Deena Reppen, SFWMD • Diane Gutierrez-Scaccetti, FL Turnpike • Doug Callaway, DOT • Duane Ashe, DOH • **Ed Coven, DOT** • Ed Peters, DMS • Edward Gonzales, D1 DOT • Elizabeth Rothbeind, ECFRPC • Ellen Wolfgang, DOR • Eric Sutton, FFWCC • Erin Rock, DMS • **Evan Enarson-Hering, Cambridge Systematics** • George Kinney, ECFRPC • Gerry O'Reilly, D4 DOT • Gray Swoope, EFI • Greg Munson, DEP • Greg Strong, DEP • Greg Vaday, TCRPC • Gus Pego, D6 DOT • Guy Gowens, NWWMD • Guy Schmidt, D4 DOT • Hugh Harling, ECFRRPC • **Huiwei Shen, DOT** • Jackie McGill, DEO • James Finch, DEO • James Murley, SFRPC • **James Stansbury, DEO** • James VanLandingham, DEO • Janice Watson, ARPC • Jasmin Raffington, DOT • Jason Peters, D3 DOT • Jeff Cole, SJWMD • Jeff Littlejohn, DEP • Jennifer Kennedy, DOS • Jennifer Moynihan, Cambridge Systematics • Jennifer Pellechio, SWFRPC • Jennifer Stults, D1 DOT • Jesse Panuccio, DEO • Jessica Blaszyk, DOR • Jim Boxold, FDACS • Jim Wood, DEP • Jing Chen, DEO • JoAnn Steele, DOH • **John Kaliski, Cambridge Systematics** • John McNeely, DOE • Jordan Green, D2 DOT • Joseph K. Maleszewski, DEO • Karl Blischke, DEO • **Katherine Morrison, DEO** • Kathleen Neill, DOT • Ken Reecy, DEO • Kim McDougal, DOE • Kristin Lock, DEO • **Larry McIntyre, DEO** • Larry Parks, D2 DOT • Leroy Marshall, SRWMD • Liam McClay, DOE • Lisa Vickers, DOR • Liz Donley, SWFRPC • Liz Gulick, TCRPC • Lorena Clark, DEO • Luis Perez-Codina, EFI • Manny Mencia, EFI • Manny Pumariega, TBRPC • Margaret Wuerstle, SWFRPC • Mario Taylor, NEFRC • Marshall Stranburg, DOR • Mary Lazor, CSF • Meade Grigg, DOH • **Melanie Weaver-Carr, DOT** • Melissa Medley, EFI • Michael Busha, TCRPC • Michael Peacock, Cambridge Systematics • Michele Miller, EFI • **Michelle Dennard, DEO** • Ming Gao, D7 DOT • Monica Russell, DEO • **Nadia Ballard, EFI** • Nancy Linehan, FFWCC • Natalie Schneider, SFWMD • Nichole Gwinnett, SWFRPC • Niki Welge, DEO • Noel Munson, DEO • Noranne Downs, D5 DOT • Oscar Gertsch, DBPR • Pat Steed, CFRPC • **Patrick O'Neil, TBRPC** • Phil Street, DOH • Rachel Benash, CFRPC • Rebecca Rust, DEO • Rhonda Noah, SFRPC • Richard Biter, DOT • **Rob Vickers, CDM Smith** • Roderic Duckworth, DOE • Ron Bartel, NWWMD • Ron Basile, Cambridge Systematics • Ronnie Whitaker, DBPR • **Rusty Ennemoser, DOT** • **Sarah Walker, Cambridge Systematics** • **Scott Koons, NCFRPC** • Shelley Lauten, myregion.org • Shari Kerrigan, DEO • Sharon Spratt, EFI • Sheri Coven, FRCA • Sherri Martin, DEO • **Sherry Ambrose, EFI** • **Stephanie Gibbons, DEO** • Steve Fitzgibbons, SJWMD • Steve Minnis, SRWMD • Stuart Rogel, Tampa Bay Partnership • Susan Estes, Opportunity Florida • Terry Joseph, WFRPC • Tom Beck, DEO • Tom Clendenning, DEO • Trisha Neasmen, SWFWMD • Vickie Smith, DEO • Whitney Alper, Cambridge Systematics • Wren Krahl, TBRPC • Zhijun Jeanne Tan, SFRPC

The planning team thanks all of the people who have given of their time to share their vision for Florida's future. Below are most, if not all, of the organizations that were represented by those who have assisted with the development of this plan. We thank you!

1000 Friends of Florida • Access Florida Finance • Adult Learning Center Osceola • Agency for Persons with Disabilities • AIT Life Safety • Alachua County • Alachua County School Board • ALGENOL Biofuels • Alico Land Development • Allen & Company • Alliance of Educational Leaders • Alpha Kappa Alpha Sorority • Ambient, Inc. • Amelia Island-Fernandina Beach-Yulee Chamber of Commerce • AMWAT Moving & Warehousing • Anderson and Association, P.A. • Andy Easton & Associates • Apalachee Regional Planning Council • Apalachee Regional Planning Council • Apalachicola Bay Chamber of Commerce • AquaFiber Technologies Corporation • Ar Maz Custom Chemicals • Archbold Biological Station • Art & Culture Center of Hollywood • Art in Motion, LLC • Artemis International Technologies • Arthrex, Inc. • Arts & Cultural Alliance of Central Florida • Arts & Cultural Alliance of Sarasota County • Arts & Cultural Alliance of St. Lucie, Inc. • Arts Council of Hillsborough County • Asolo Repertory Theatre • Associated Builders & Contractors, Inc. • Associated Industries of Florida • Association of Metro Orlando • ATKINS Global, Inc. • Atlantic Blue Group • Audubon Florida • Ave Maria University • Aviation • Avon Park Air Force Range • Avon Park Housing Authority • Awards4U • Bach Festival Society of Winter Park • Baker County • Baker County Chamber of Commerce • Baker County School District • Bank of America • Bank of America Merrill Lynch • Banks Engineering • Baptist Health • Barney Bishop Consulting, LLC • Barron Collier Companies • Barry University • Bartow Consulting Group • Bauer Foundation • Bay County • Bay County Chamber of Commerce • Bay Economic Development Alliance • BB&T Bank • Beaver Street Enterprise Center • Becker Holding Corporation • Berger Real Estate • Bert Harris Jr. Agri-Civic Center • Best Driver Resources, Inc. • Biltmore Hotel • Biotest Pharmaceutical Corporation • Black Business Investment Fund of Central Florida • Bonita Springs Chamber of Commerce • Boone, Boone, Boone, Koda & Frook PA • Boys and Girls Club of Osceola County • Bradford County • Bradford County School District • Brandon Chamber of Commerce • Brevard Community College • Brevard Workforce • British Consulate • Brockman & Jones • Broward County Emergency Management Division • Broward County Office of Economic and Small Business Development • Broward Days • Broward Metropolitan Planning Organization • Bryant Miller Olive • Bullock Tice Associates, Inc. • Business Development Board of Martin County, Inc. • Business Development Board of Okeechobee, Inc. • Business Development Board of Palm Beach County, Inc. • C.T. Hsu + Associates, P.A. • Caja de Ahorros del Mediterraneo • Calderon & Associates, Inc. • Calhoun County Board of Commissioners • Calhoun County Chamber of Commerce • Calhoun County School Board • Callery-Judge Grove • Calusa National Bank • CAMACOL (Latin Chamber of Commerce of U.S.A.) • Cambridge Systematics • Canaveral Port Authority • Capital City Chamber of Commerce • Cardno TBE • Career Edge • Carlton Fields, P.A. • Carmen Dominguez Construction, LC • Carrabelle Economic Development Council, Inc. • Cathedral Arts • CDM Smith Home, Inc. • Center for Business Excellence • Central Florida Development Council • Central Florida Development Council of Polk County • Central Florida Media Group • Central Florida Partnership • Central Florida Regional Development Council • Central Florida Regional Planning Council • Central Florida Urban League • Century 21 Properties • Century 21 World Properties • Century Chamber of Commerce • CEVA Freight, LLC • CF Industries, Inc. • Charlotte County Economic Development Office • Charlotte County Public Schools • Charlotte County-Punta Gorda • Charlotte Harbor National Estuary Program • Charlotte-DeSoto Building Industry Association • Cheffy Passidomo Naples, Florida Attorneys at Law • China Business Development Associates • Chipola College • Chipola Workforce Board • Circus Sarasota • Citizen's Bank & Trust • Citrus County Economic • City Kids Art Factory, Inc. • City of Arcadia • City of Auburndale • City of Bartow • City of Belleair • City of Bonita Springs • City of Bristol • City of Brooksville • City of Bunnell • City of Callaway • City of Cape Coral • City of Carrabelle • City of Clearwater • City of Clewiston • City of Crystal River • City of Dade City • City of Deltona • City of Destin • City of Edgewater • City of Fernandina Beach • City of Fort Meade • City of Fort Myers • City of Fort Pierce • City of Fort Walton Beach • City of Frostproof • City of Gainesville • City of Green Cove Springs • City of Gretna • City of Jacksonville • City of Key West • City of Keystone Heights • City of Kissimmee • City of LaBelle • City of Lake Alfred • City of Lake City • City of Lakeland • City of Macclenny • City of Marianna • City of Midway • City of Miramar • City of Monticello • City of Naples • City of New Port Richey • City of North Port • City of Ocala • City of Okeechobee • City of Orlando • City of Palm Coast • City of Plant City • City of Plantation • City of Port St. Joe • City of Port St. Lucie • City of Punta Gorda • City of Sanibel • City of Sarasota • City of Sebring • City of Seminole • City of South Bay • City of South Pasadena • City of St. Marks • City of Stuart • City of Tallahassee • City of Titusville • City of Treasure Island • City of Wauchula • City of Wewahitchka • City of Williston • City of Winter Haven • City of Winter Springs • City of Zephyrhills • Claro Scientific, LLC • Clay County • Clay County Chamber of Commerce • Clay County Commission • Clay County Port, Inc. • Clear Channel Outdoor • Clear Springs Energy Company, LLC • Clearwater Regional Chamber of Commerce • Clewiston Chamber of Commerce • Clifton, Larson, Allen LLP, CPAs • Cm Payne & Son Seed Co. • CMD Trailer Sales & Leasing, Inc. • Coldwell Banker Sunstar-Morris Realty, Inc. • College of Central Florida • Collier County Government • Collier County Public Schools • Collier Enterprises • Columbia County • Columbia County Economic Development Council • Columbia County Tourist Development Council • Commercial Carrier Corporation • ConEdison Solutions • Consensus Communications • Conservancy of Southwest Florida • Conservation Foundation of the Gulf Coast • Consulate General of Canada • Consulate General of France • Coral Gables Chamber of Commerce • Council on Culture & Arts • Creative Clay • Creative Staffing of Crystal River • Crestview Community Center • Crummer Museum of Art & Gardens • CSX Transportation • Cultural Council of Greater Jacksonville • Cultural Council of Indian River County • Curtis Protective Services • CZA, Inc. • D.C. Group of South Florida, Inc. • David H. Melvin, Inc. • Daytona Beach Symphony Society • Daytona International Speedway • Deborah K. Thompson, Consultants • Department of Agriculture and Consumer Services, Office of Energy • Department of

Children & Families • Department of Economic Sustainability • DeSoto County • Desoto County Board of County Commissioners • Desoto County Development Council • Desoto County School Board • Diaz, Reus & Targ, LLP • Disney Destinations, LLC • Doug Darling • East Central Florida Regional Planning Council • EcoArt South Florida, Inc. • Economic Council of Martin County • Economic Council of Palm Beach County • Economic Development Commission of Florida's Space Coast • Economic Development Corporation of Sarasota County • Economic Development Council of St. Lucie County, Inc. • Economic Modeling Specialists, Inc. • Ecotone Land Design, Inc. • Edge Public Affairs, LLC • Edison National Bank • Edison State College • Education Commission of Palm Beach County • Edward Waters College • ElderSource • Elephant Outlook • EMBARQ Corporation • England, Thims & Miller, Inc. • Enterprise Development Corporation • Enterprise Florida, Inc. • Environmental Protection Commission of Hillsborough County • ESP Worldwide • Evans Properties, LLC • Everest University • Evolution Advisors • Executive Office of the Governor • Exim Financial Group • Florida Advisory Council on Small and Minority Business Development • Fairfield Index • Falcon Financial Services • Fantasy of Flight • Florida Association for Volunteer Action in the Caribbean and Americas (FAVACA) • Felburn Foundation • Florida Heartland Regional Economic Development Initiative (FHREDI) • Florida International Bankers Association • Fidelity Investments • Fifth Avenue Advisors, LLC • Fifth Third Bank of Florida • First Coast Community Bank • First Coast Manufacturers Association • First Colonial Realty • First State Bank of the Florida Keys • Florida Alliance of Community Development Corporations • Flagler Development Group • Florida A & M University (FAMU) • FAMU Small Business Development Center • Florida Advisory Council on Small and Minority Development • Florida Alliance for Arts Education • Florida Alliance of Community Development Corporations • Florida Association for Community Action • Florida Association for Theatre Education • Florida Association of Counties • Florida Association of Minority Business Enterprise Officials • Florida Atlantic University • Florida Atlantic University – Harbor Branch Oceanographic Institute • Florida Board of Governors • Florida Business League, Inc. • Florida Chamber Foundation • Florida Chamber of Commerce • Florida Community Bank • Florida Council of 100 • Florida Council on Aging • Florida Customs Brokers & Forwarders Association • FL Department of Economic Opportunity • FL Department of Education • FL Department of Environmental Protection • FL Department of Health • FL Department of Law Enforcement • FL Department of Management Services • FL Department of Military Affairs • FL Department of Professional and Business Regulation • FL Department of Revenue • FL Department of State • FL Department of Transportation • Florida East Coast Railway • Florida Economic Gardening Institute • Florida Farm Bureau • Florida Fish and Wildlife Conservation Commission • Florida Gateway College • Florida Grand Opera • Florida Gulf Coast University • Florida Home Builders • Florida Horse Park Foundation • Florida House of Representatives • Florida Housing Finance Corporation • Florida Institute of Government • Florida Institute of Technology • Florida International University • Florida International University/ Manufacturing Extension Partnership • Florida KidCare • Florida League of Cities • Florida Manufacturing Partnership • Florida National Guard • Florida Native Plant Society • Florida Non-Profit Housing, Inc. • Florida Ports Council • Florida Power & Light Company • Florida Public Safety Institute • Florida Regional Councils Association • Florida Research Consortium • Florida Retail Federation • Florida Senate • Florida Small Business Development Center • Florida Southern College • Florida Sports Foundation • Florida State College at Jacksonville • Florida State University • Florida Studio Theatre • Florida TaxWatch • Florida Wildlife Federation • Florida's Great Northwest • FloridaWorks • Foley Land and Timber Company • Fort Myers Broadcasting (WINK TV) • Fort Myers Regional Partnership/Horizon Council • Fort Walton Beach Chamber of Commerce • Fowler White Boggs, P.A. • Franklin County Administration • Franklin County Board of Commissioners • Franklin County Economic Development Council • Franklin County Planning Department • Franklin County School Board • Fred Fox Enterprises • French Consulate • Fuentes & Rodriguez Consulting Group • Full Sail University • Gadsden County Board of Commissioners • Gadsden County Chamber of Commerce • Gadsden County Economic Development Council, Inc. • Gadsden County School Board • Gainesville Chamber of Commerce • Gainesville Community Redevelopment Agency • Gainesville Council for Economic Outreach • Gainesville Regional Airport • Gainesville Regional Utilities • Gator Engineering & Aquifer Restoration, Inc. • Gifford Youth Activity Center • Gigabit Squared • Gilchrist Chamber of Commerce • Gilchrist County IDA • Glades County • Glades County Board of County Commissioners • Glades County Economic Development Council, Inc. • GMS Group, LLC • Gravina, Smith & Matte & Arnold, Inc. • GrayRobinson, P.A. • Great Circle Shipping Corporation • Greater Circle Shipping Corporation • Greater Fort Lauderdale Alliance • Greater Miami Chamber of Commerce • Greater Orlando Aviation Authority • Greater Sarasota Chamber of Commerce • Green Energy Solutions Partners • Greenberg Traurig, P.A. • GreenTechnologies, LLC • Grubb and Ellis Company • Gulf Breeze News • Gulf Citrus Growers Association • Gulf Coast Builders Xchange • Gulf Coast Community Foundation • Gulf Coast State College • Gulf Coast State College-Small Business Service Center • Gulf Coast Workforce Board • Gulf County • Gulf County Administration • Gulf County Board of Commissioners • Gulf County Chamber of Commerce • Gulf County Economic Development Council • Gulf County School Board • Gulf Power Company • Gunster Law Firm • Gutierreznyc • H2 Performance Consulting • Haines City • Haines City Chamber of Commerce • Haines City Economic Development Council • Hamilton County • Hardee County Board of County Commissioners • Hardee County Commission • Hardee County Economic Development Office • Hardee County School Board • Hatch Mott MacDonald • HBA of Metro Orlando • Health Planning Council of Northeast Florida • Health Savings Account Florida • Heart of Florida United Way • Heartland Agricultural Coalition • Heartland Educational Consortium • Heartland Workforce • Hendershot Economics • Henderson Franklin, Attorneys at Law • Hendry County • Hendry County Board of County Commissioners • Hendry County Economic Development Council • Hernando County Office of Business Development • Hernando County Planning Department • Highlands County Commission • Highlands County Economic Development Commission • Highlands County School Board • Hill-Donnelly Corporation • Hillsborough Community College • Hillsborough County Economic Development • Hillsborough County Planning Commission • Hillsborough Schools • Hispanic Business Initiative Fund of Florida • Hixardt Technologies, Inc. • Hodges University

• Hollywood Central Performing Arts Center • Holmes County Development Commission • Home Builders Association of Metro Orlando • Hope Hospice • Hopping Green & Sams, P.A. • Housing Authority of the City of Fort Myers • Housing Leadership Council of Palm Beach County • Hoyt C. Murphy, Realtors, Inc. • Human Resources Solutions • Hunting Deutsch • IGS, Inc. • IMC healthcare, Inc. • Imex International • Immokalee Community Redevelopment Agency • Impact Development Group • Indian River Chamber of Commerce • Indian River County • Indian River County Health Department • Indian River County Metropolitan Planning Organization • Indian River State College • Infinity Global Solutions • Inges & Associates • Innovation Gainesville • Innovation Park – RDA • Institute for the Commercialization of Public Research • Intergovernmental Planner, St. Johns River Water Management District • International Business Machine, Inc. • Island Bay Resort • Jackson County • Jackson County Administration • Jackson County Board of Commissioners • Jackson County Economic Development Council, Inc. • Jackson County School Board • Jackson County Tourist Development Council • Jacksonville Children’s Chorus • Jacksonville City Council • Jacksonville Office of Economic Development • Jacksonville Port Authority • Jacksonville Regional Chamber of Commerce • JAXUSA Partnership • Jefferson Arts, Inc. • Jefferson County • Jefferson County Administration • Jefferson County Board of Commissioners • Jefferson County Economic Development Council, Inc. • Jefferson County School Board • Jefferson County Tourist Development Council • Johnson Engineering • Jones Edmunds & Associates, Inc. • Juvenile Welfare Board • KAMedData, Inc. • Kannon Asia • Kersteen Consulting, Inc. • Keystone Challenge Fund • Killashee Investments • Kirkwood Electric • Kitson & Partners, LLC • Lafayette County Emergency Management • LAH Group Advisors, LLC • Lake County • Lake Wales Care Center • Lake Wales City Commission • Lakeland City Commission • Lakeland Area Chamber of Commerce • Lakeland County Economic Development Council, Inc. • Lampl Herbert Consultants • Last Stand • Latin Chamber of Commerce • Lauderdale Lakes Community Redevelopment Agency • Lee County Economic Development Office • Lee County Electric Cooperative • Lee County Health Department • Lee County Metropolitan Planning Organization • Lee County Port Authority • Lee County School District • Lee County Sheriff’s Office • Lee County Visitor’s Bureau • Lee Memorial Health System • LeeSar and Cooperative Services of Florida, Inc. • Leon County Administration • Leon County Board of Commissioners • Leon County Economic Development Council • Leon County School Board • Leon County Tourist Development Council/Visit Tallahassee • Liberty County Board of Commissioners • Liberty County Chamber of Commerce • Liberty County School Board • LKJG, Inc. • Lykes Brothers, Inc. • Madison County Development Commission • Main Street Broadband • Manager of Grants Development, College of Central Florida • Manatee County • Manatee Economic Development Corporation • Manufacturers Association of Florida • Manufactures Association of Florida • Manufacturing Extension Partnership • Marco Marriott Golf and Beach Resort • Margaret Emblidge & Associates, LLC • Marina G. 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