



FLORIDA
DEPARTMENT *of*
ECONOMIC
OPPORTUNITY

Regional Stakeholders Forum

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Welcome and Opening Remarks



Welcome

A message from Governor Rick Scott...



Governor Rick Scott



Welcome

A message from Secretary of Commerce
Gray Swoope...



Recognition of Participants



The Plan for the Day

- Registration
- Pillar Assignment
- Meeting Packet
 - Agenda
 - Workshop Materials
- Housekeeping
 - Food and Facilities
 - Cell Phones Muted





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OPPORTUNITY

Overview

The Strategic Planning Process

presented to
Florida Department of Economic Opportunity
Strategic Plan Regional Stakeholders Forum

presented by
Barbara Foster
Florida Department of Economic Opportunity



Statutory Requirements

- Section 20.60(5)(a)4, Florida Statutes requires DEO to develop and regularly update a **5-year strategic plan**.
- Participant Handout, Page 1

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1



Approach

- **Phase I: October-December 2011**
 - Synthesize existing plans.
 - Assess key trends and competitive position.
 - Convene one-day stakeholder workshop.
- **Phase II: Winter - Spring 2012**
 - Convene regional forums.
 - Develop draft Plan for public comment.
 - Adopt Strategic Plan.



Approach

- Phase III: Summer 2012 and beyond
 - Begin implementation.
 - Align other state, regional, local plans.
 - Measure progress.
 - Move toward 50-year vision.



Strategies Assessment/Priorities

- Please stay for this afternoon's work – where we will collect your input
- Make distinctions:
 - Based on your expertise, knowledge, experiences, etc.
 - Recognize local/regional planning underway
 - Recommend/advise state action (your opportunity to tell us what to do!)

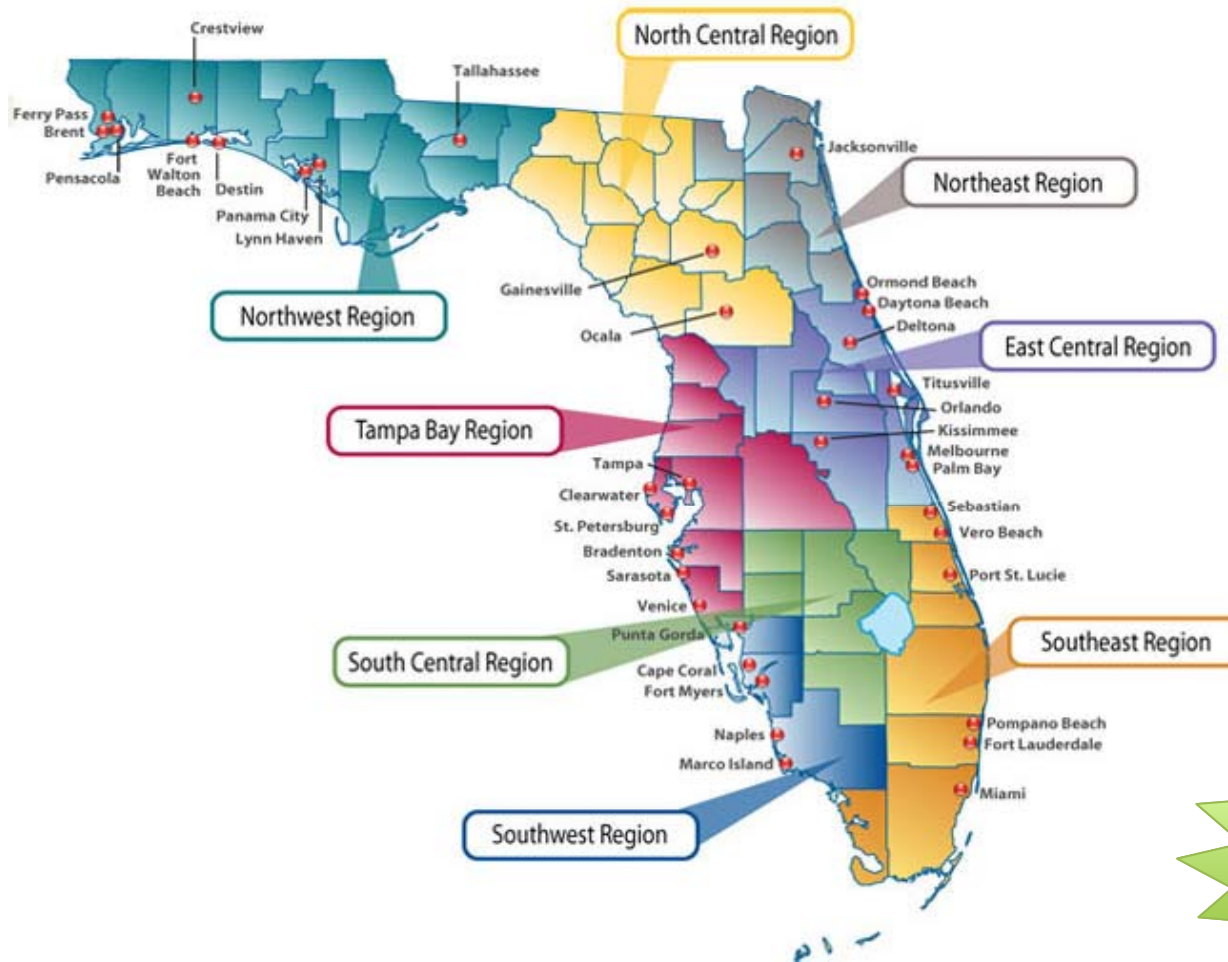


Approach

- How your input will be used
 - One of many voices / “many Floridas”.
 - Today is a geographical discussion
 - Many voices, venues, and partners
 - Ultimate Steering Committee
 - Governor Rick Scott
 - Gray Swoope, Secretary of Commerce
 - Chris Hart, President, Workforce Florida
 - Cynthia Lorenzo, Interim Executive Director, DEO



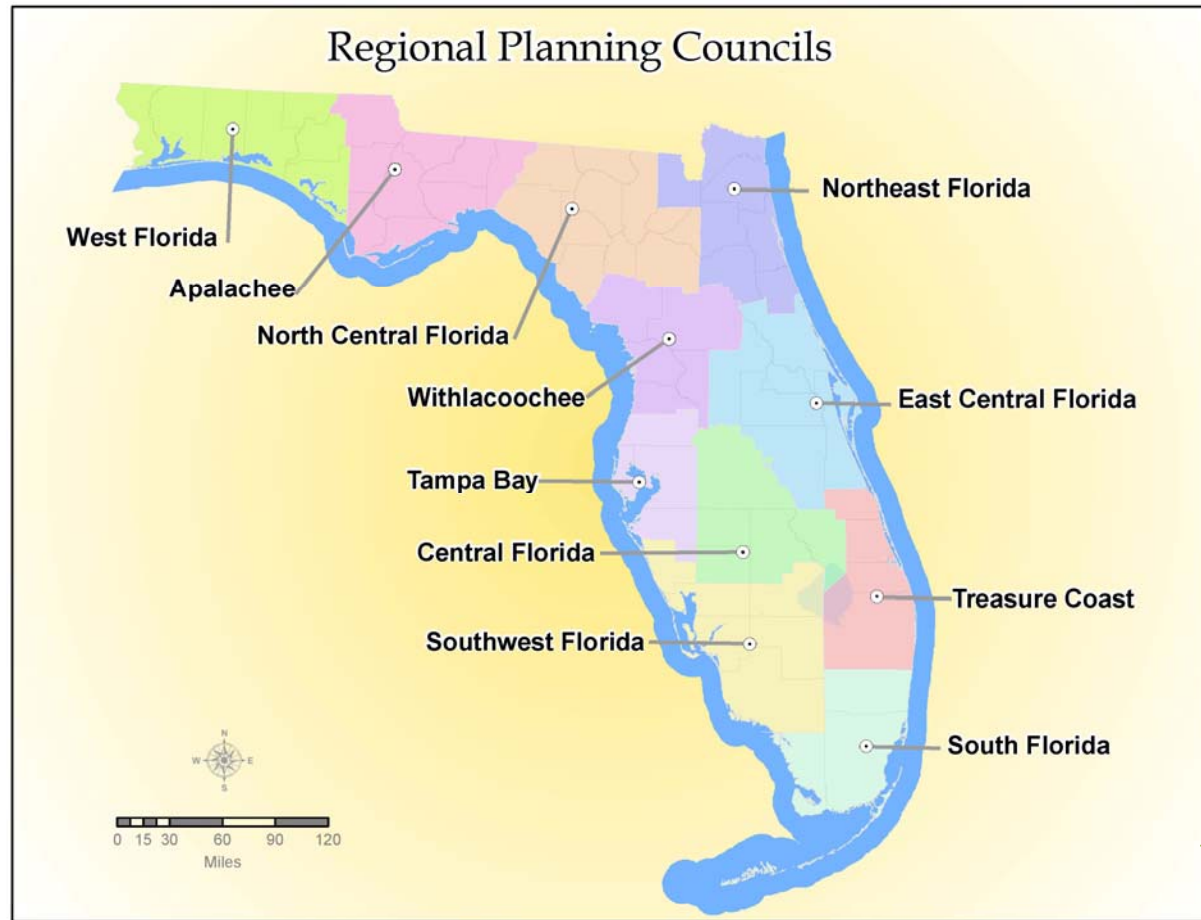
Starting Point: EFI & WFI Regions



Page
2



Starting Point: RPCs & CEDS



Page
2



Now What? Let's:

- Take a look at the Economic Trends and Florida's Competitive Position.
- Understand the region's CEDS and other key initiatives.
- Share the vision, goals, and objectives.
- Assess the efficacy of the suggested strategies derived from research and stakeholders.





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Economic Trends and Florida's Competitive Position

- John Kaliski

Cambridge Systematics



Presentation Outline

- Current realities
- Future trends
- How do we compete?
- Where do we stand?

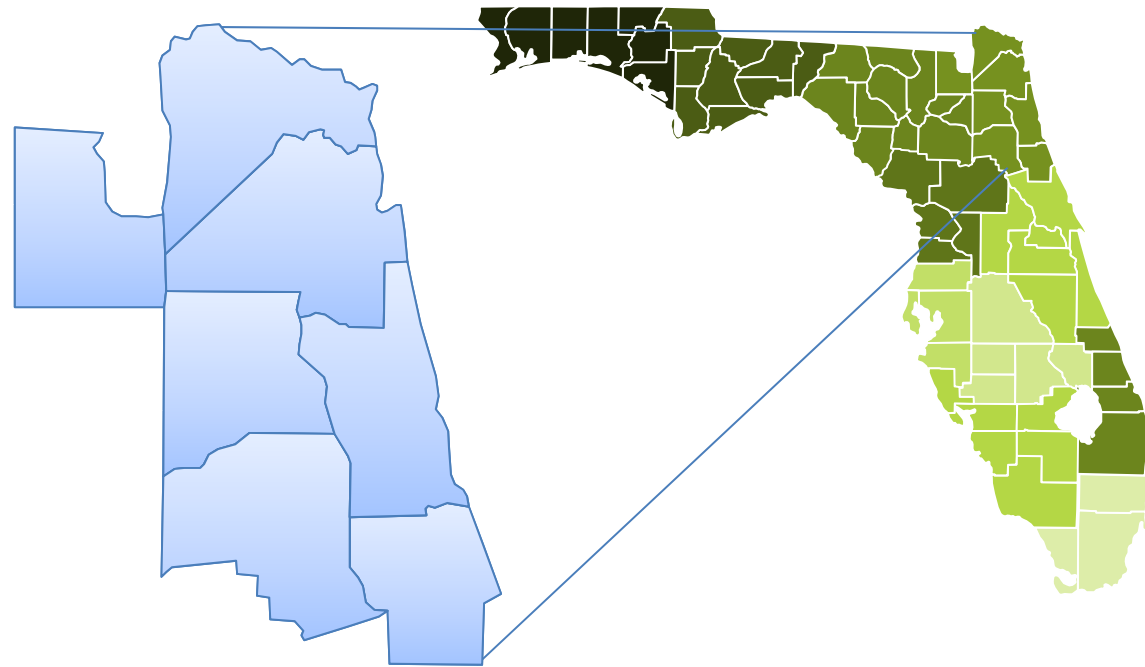


Source: Florida Trend.



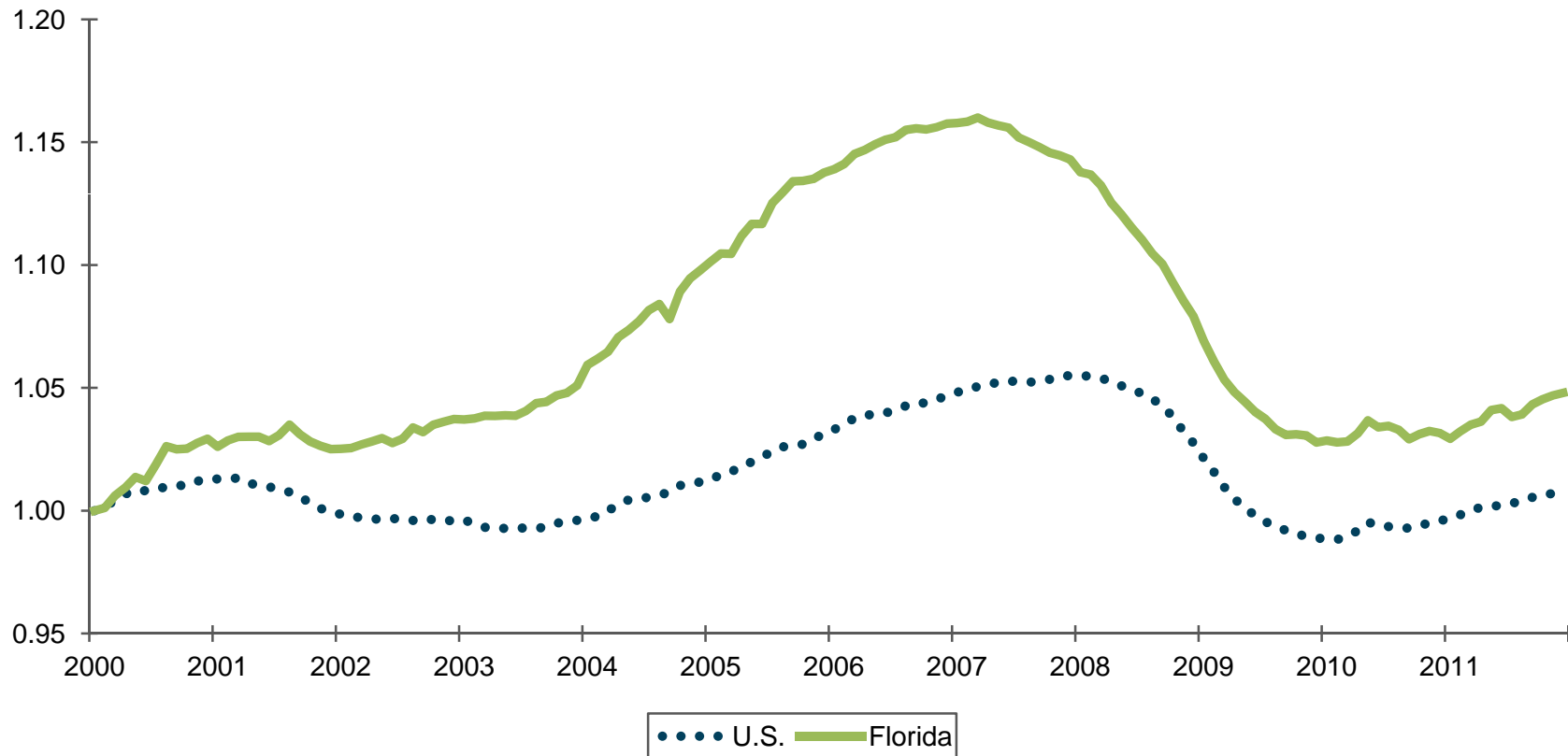
Northeast Florida Region

- Baker
- Clay
- Duval
- Flagler
- Nassau
- Putnam
- St. Johns



Recession Erased Job Gains of the Past Decade

Employment, Index 2000 = 1.0

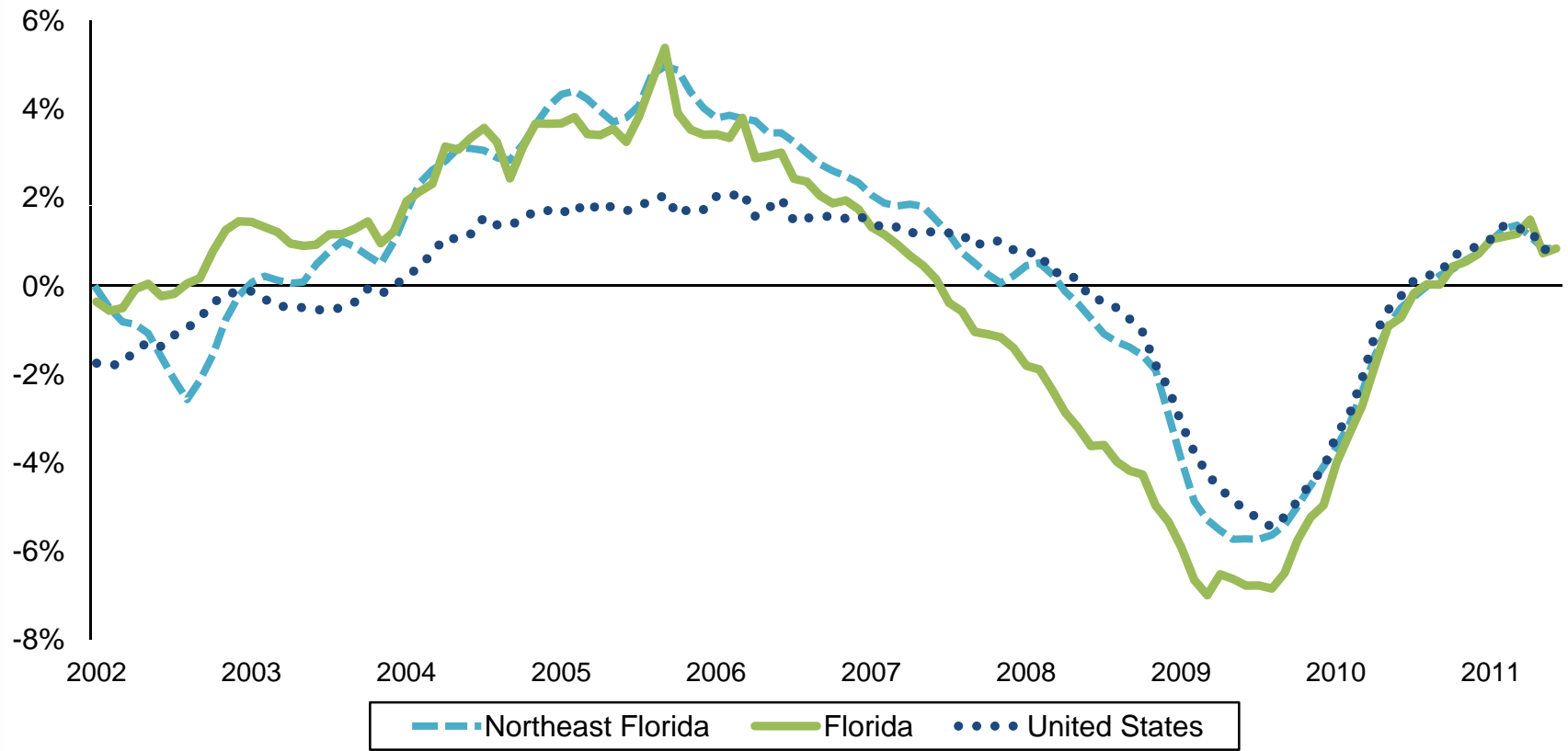


Source: U.S. Bureau of Labor Statistics, "Current Employment Statistics."



Employment Growth in Northeast Florida

Year-Over-Year Percent Change

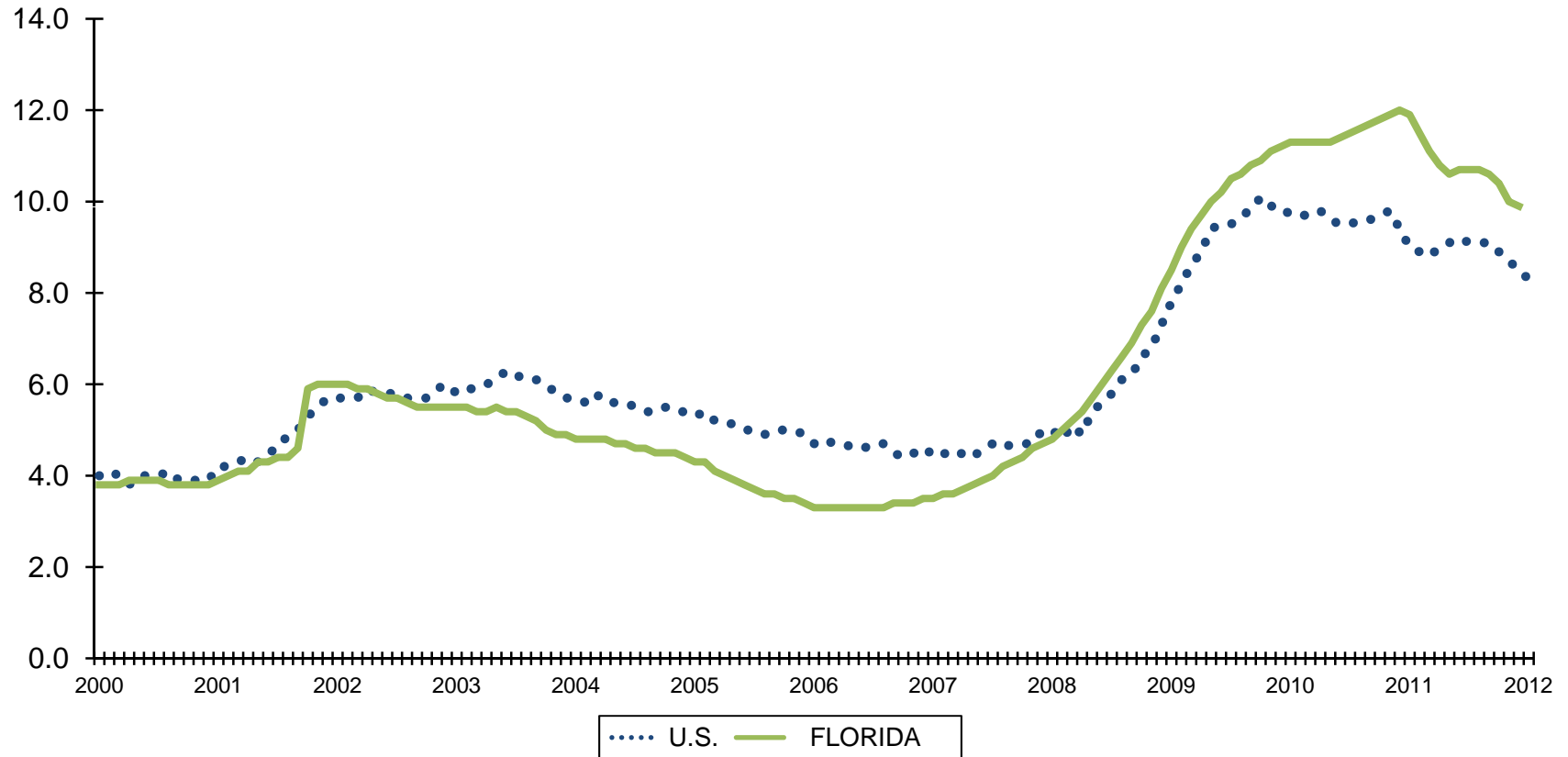


Source: U.S. Bureau of Labor Statistics, "Current Employment Statistics."



Unemployment Rate Easing Downward

Unemployment Rate (in Percent)

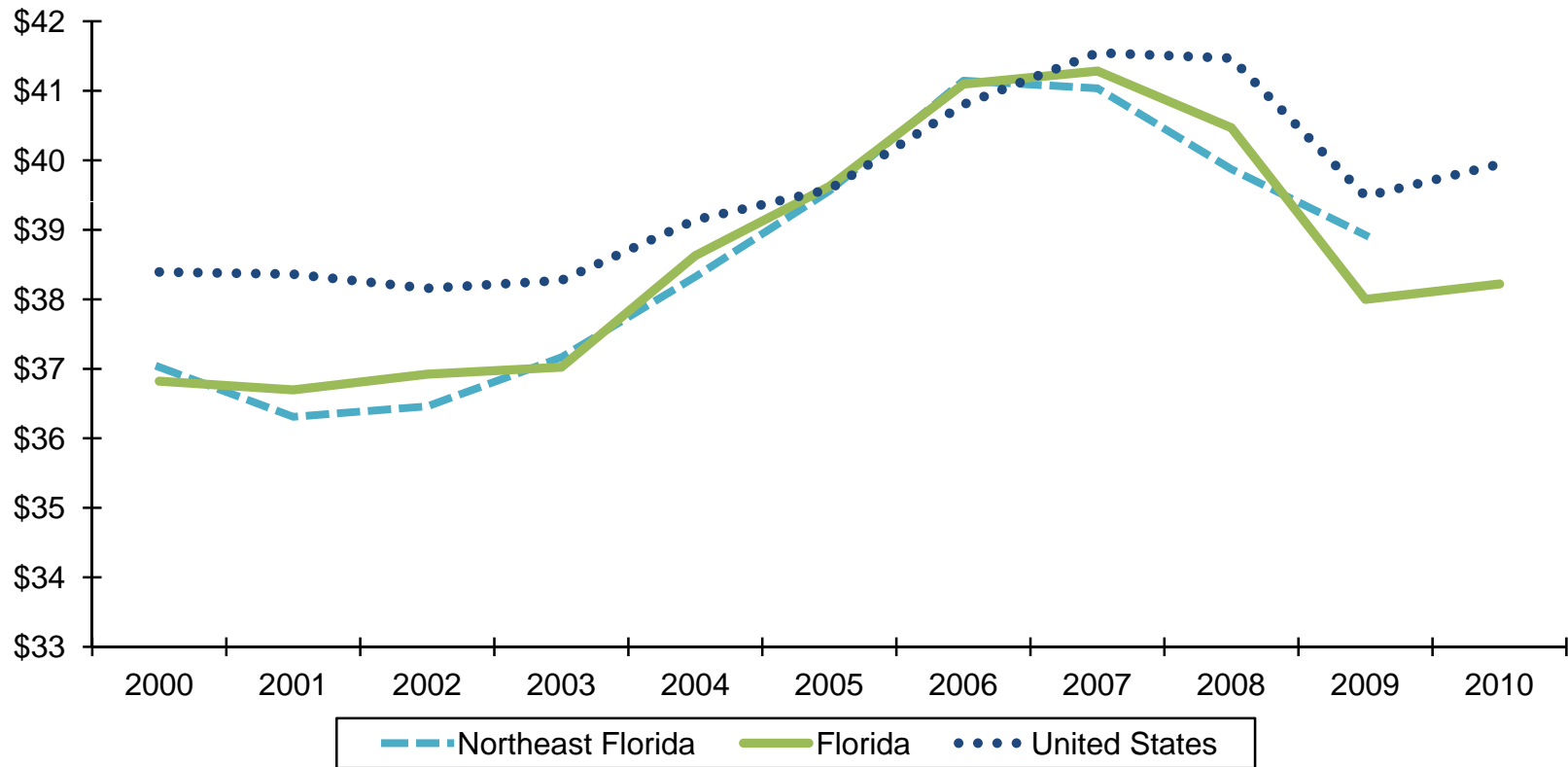


Source: U.S. Bureau of Labor Statistics, "Local Area Unemployment Statistics."



Per Capita Income Is Tracking with the State's

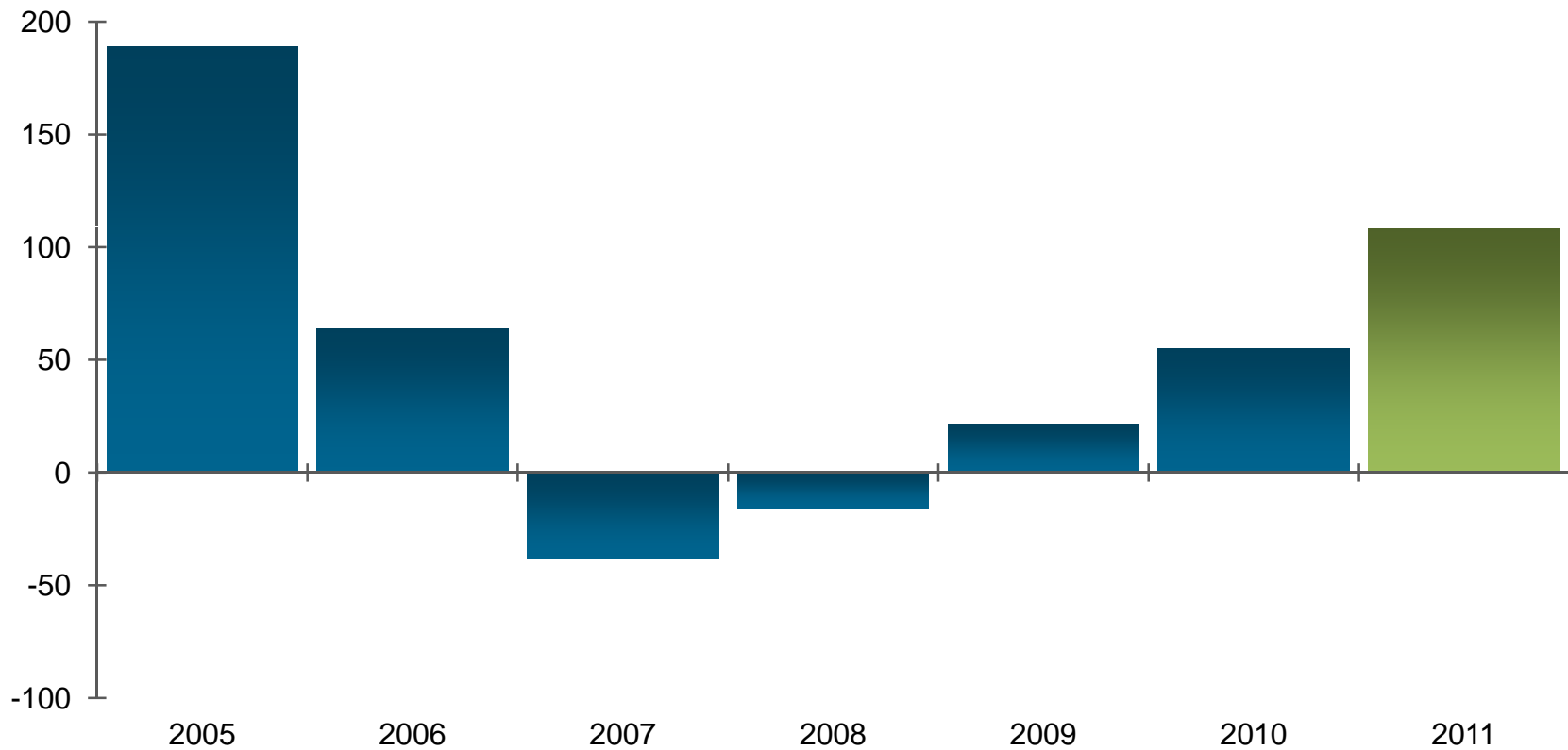
Per Capita Income (in Thousands of \$2010)



Source: U.S. Bureau of Economic Analysis.



Net Domestic Migration Has Resumed

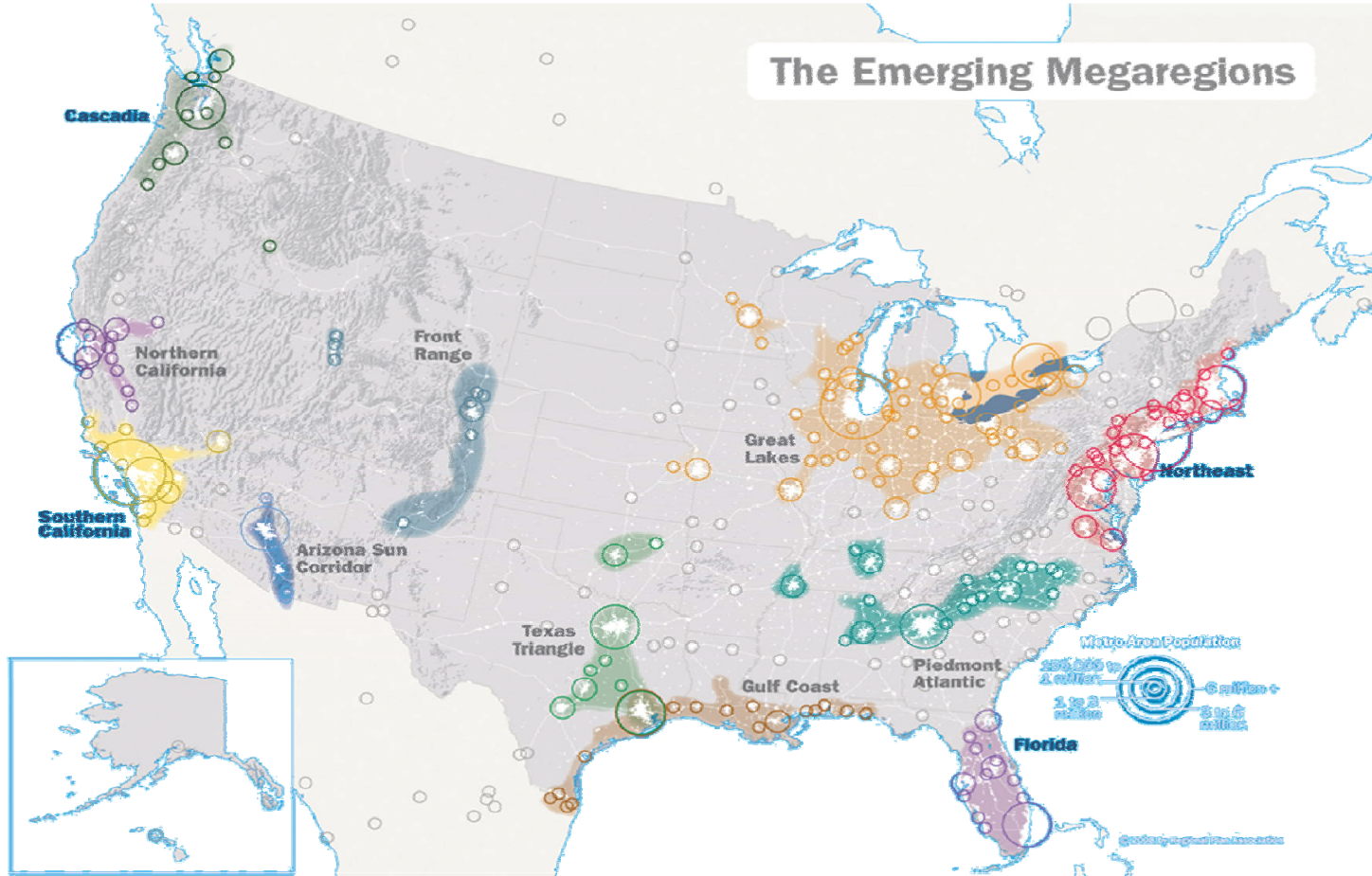


Source: U.S. Census Bureau, American Community Survey (for the 2005-2010 data) and Population Estimates Program (for the 2011 data).



A New Economy

Competing as Regions... and Megaregions

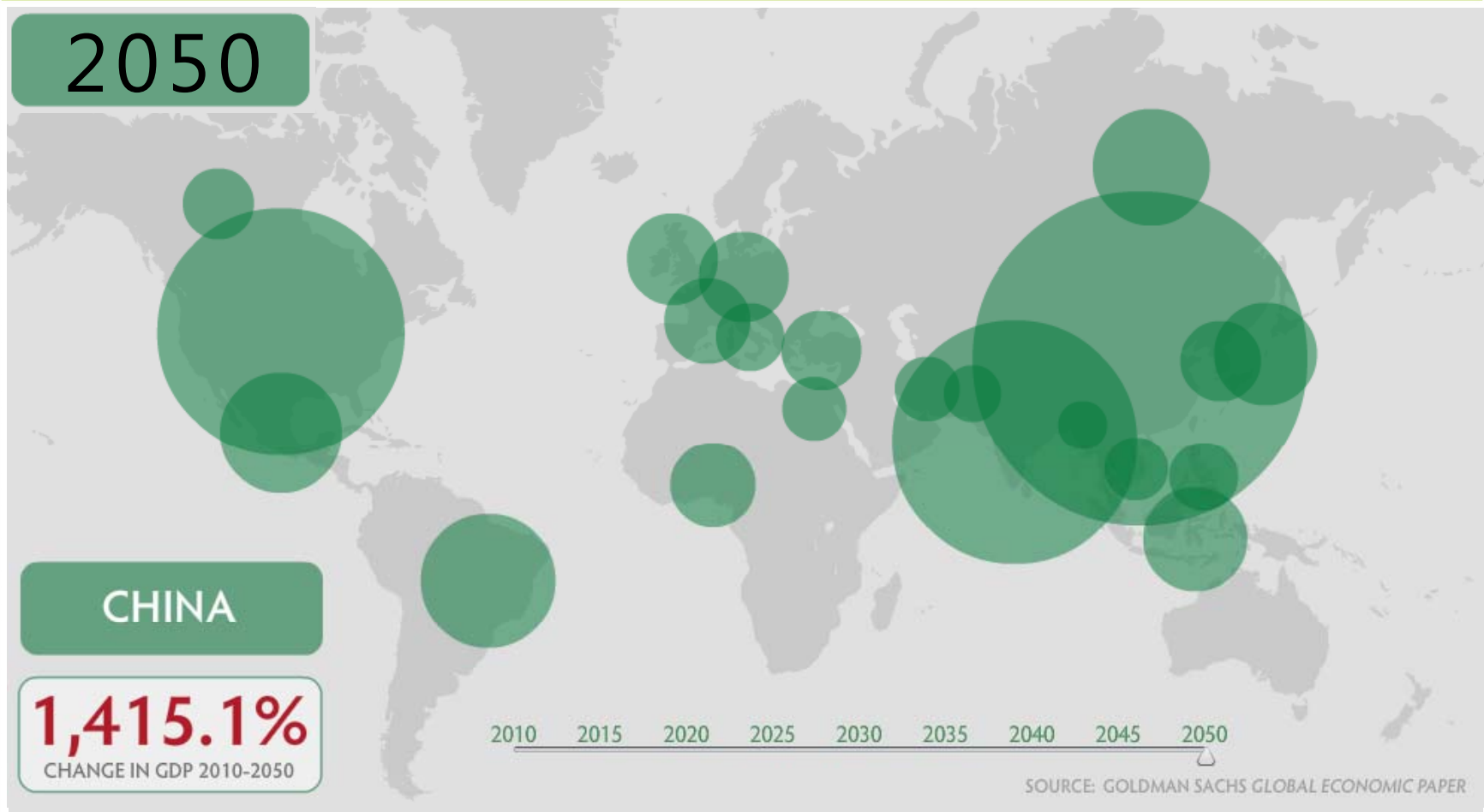


Source: America 2050.



A New Economy

Global Markets



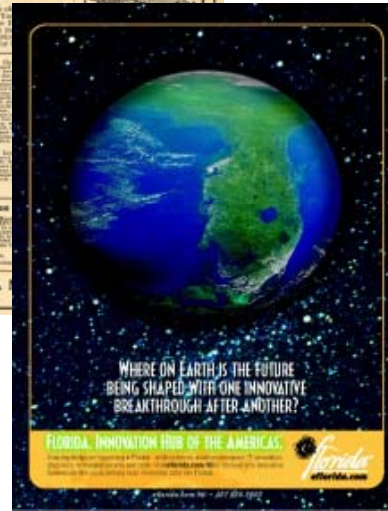
Source: Goldman Sachs, 2008.



How Do We Compete?

Florida then...

- Low costs
- Climate
- Land and natural resources



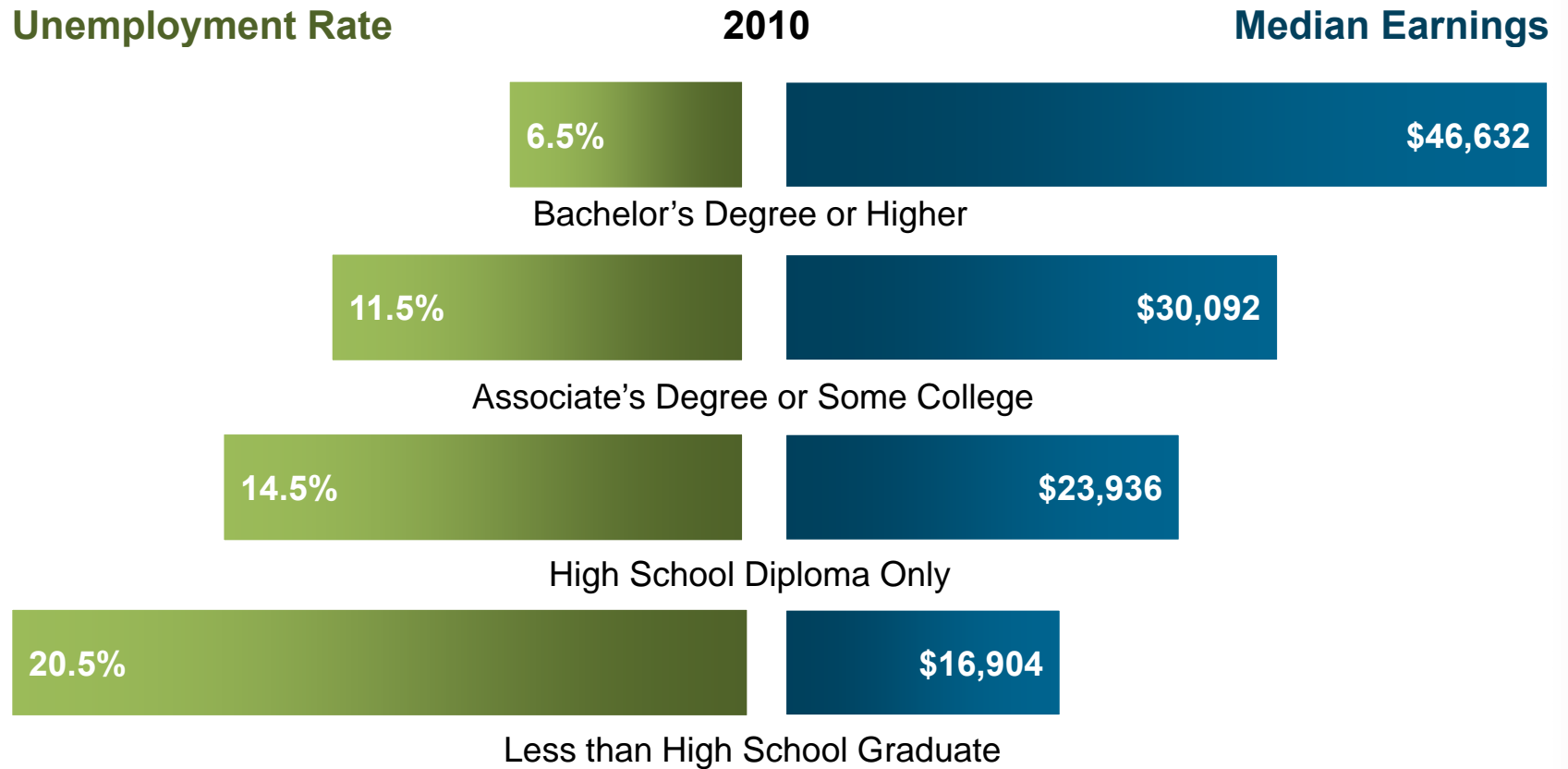
Florida Now...

- Talent
- Innovation
- Infrastructure
- Business climate
- Civic and governance systems
- Quality of life and quality places



Talent Supply and Education

Educational Attainment Key Driver of Jobs and Income



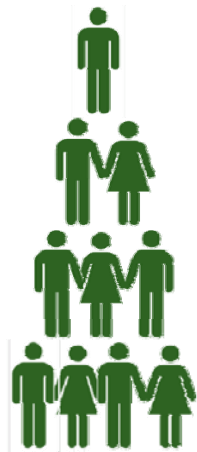
Source: U.S. Census Bureau, American Community Survey.



Talent Supply and Education

Can We Provide the Workforce for the Future?

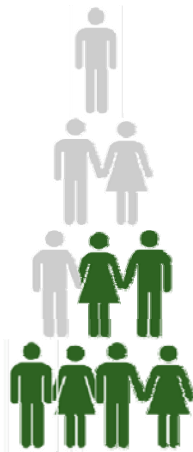
10...



...students in a
9th grade class

2002

6...



...graduate from
high school

2005

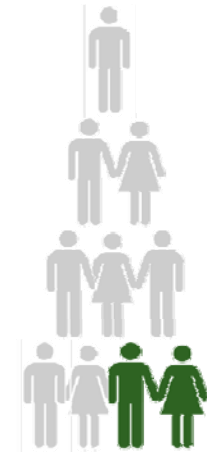
3...



...continue to college
within two years

2007

2...



...earn college credit
within two years

2009

Source: Florida Board of Education 2011.



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Talent Supply and Education

Educational Attainment 2006-2010

Population over 25...

...with less than a High School degree ...with HS, Associate's Degree, or some college ...with a Bachelor's Degree, or higher



Northeast Florida



Florida



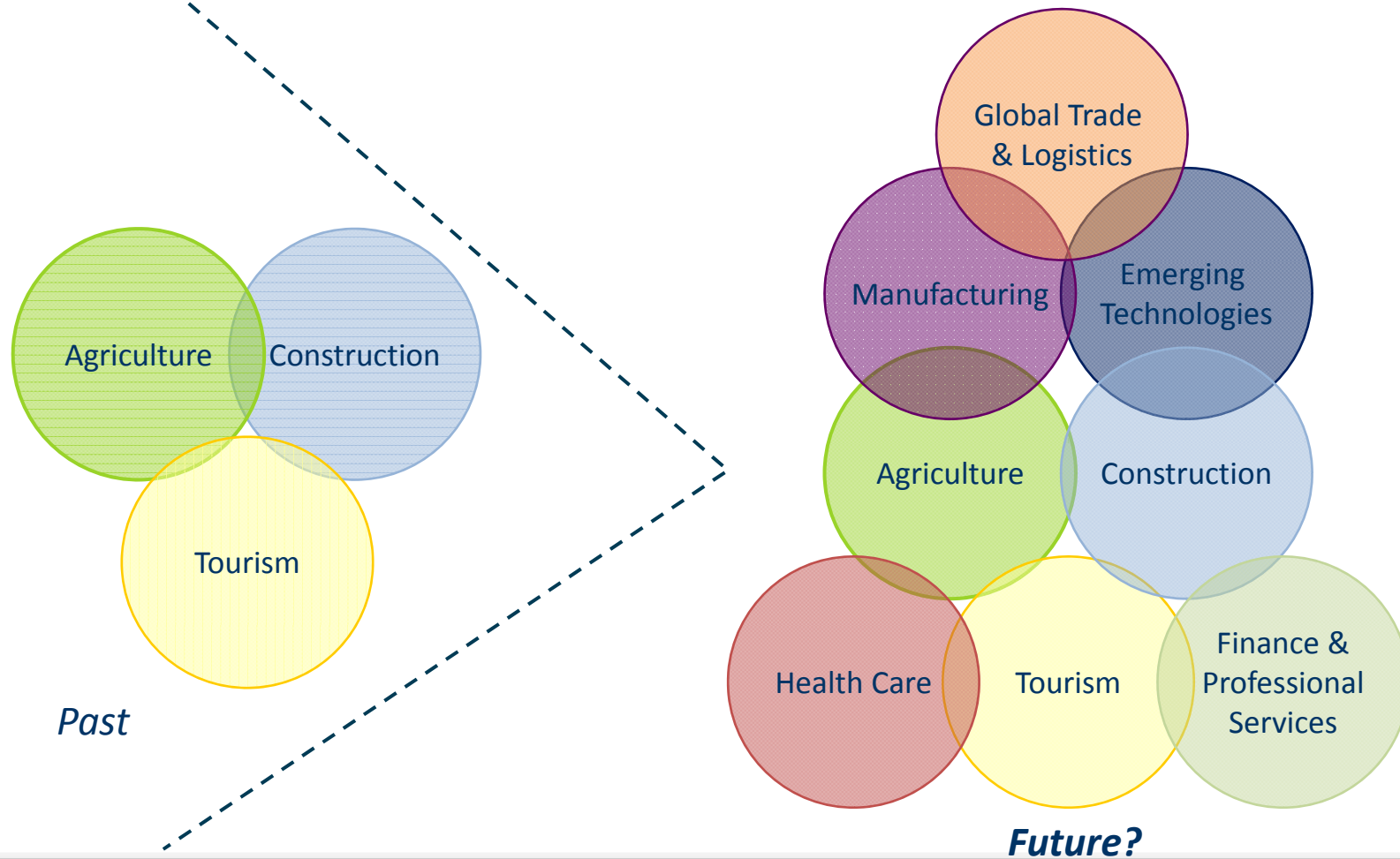
United States

Source: U.S. Census Bureau, American Community Survey 2006-2010 five-year estimates. Some figures do not add to 100 due to rounding



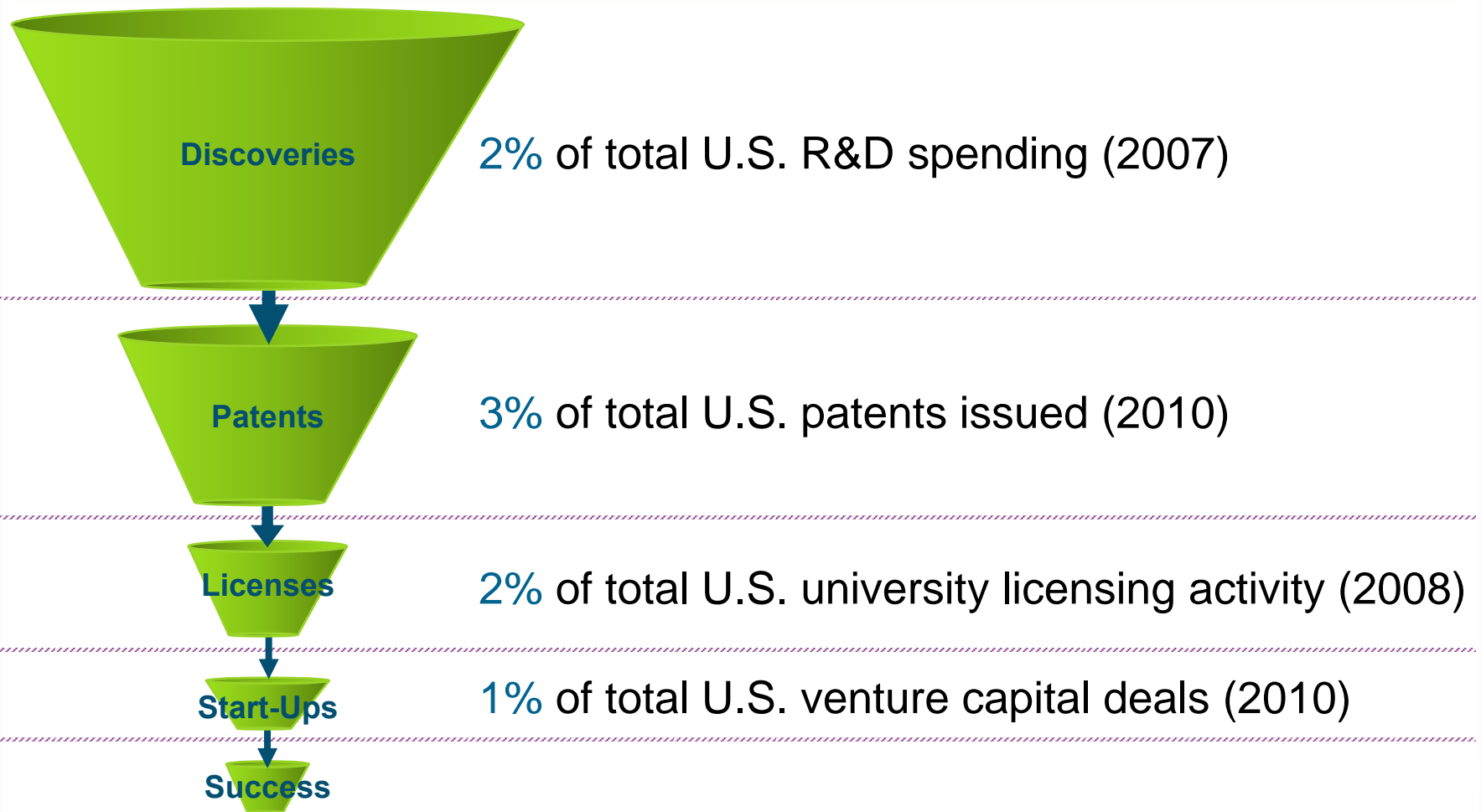
Innovation and Economic Development

Changing Industry Composition



Innovation and Economic Development

Can We Strengthen Our Innovation Pipeline?



Innovation and Economic Development

Florida's Innovation Hubs



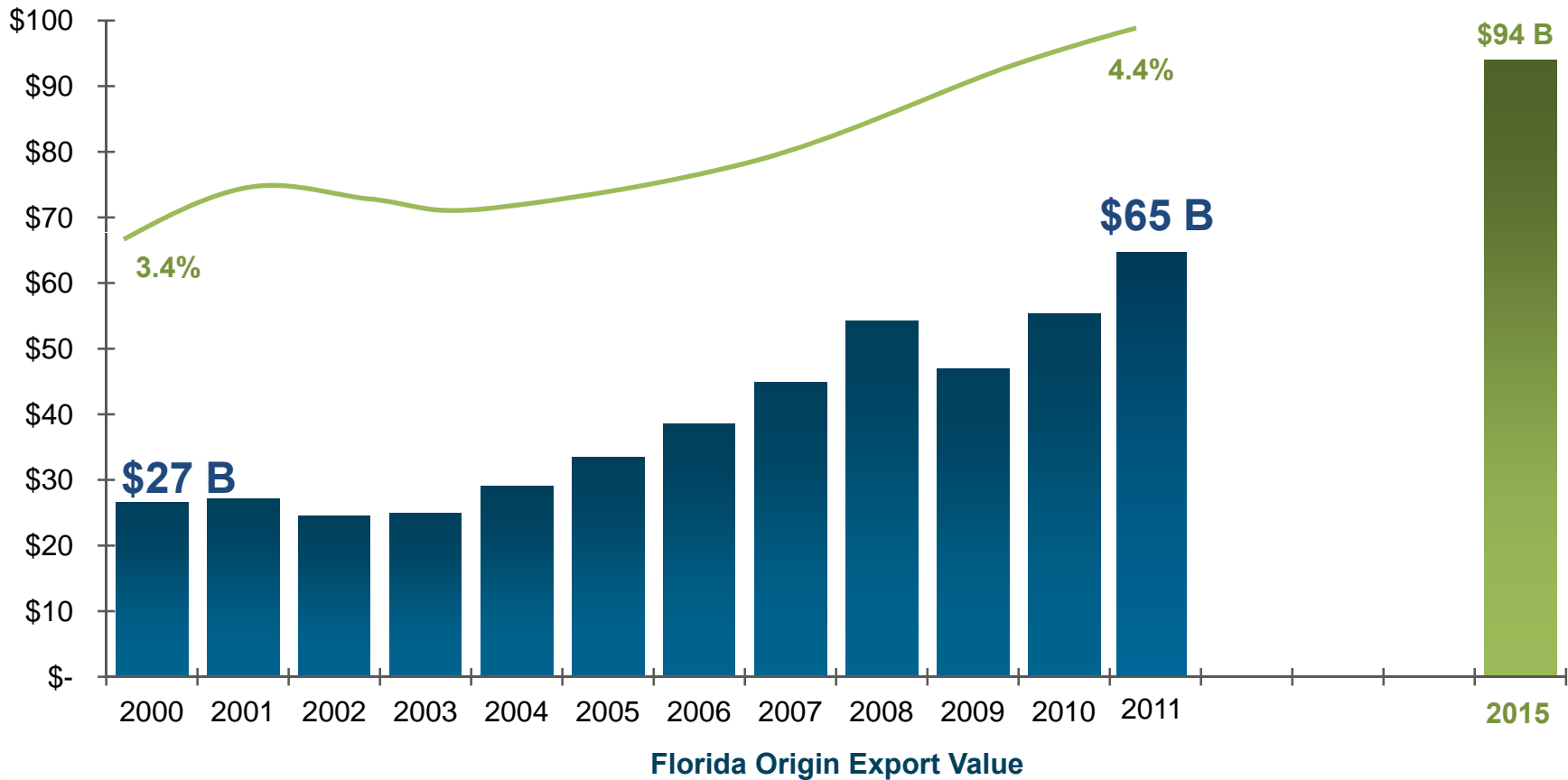
Source: InfoUSA; Florida Division of Colleges and Universities; Foundation for Independent Higher Education.



Innovation and Economic Development

Can We Expand Our Global Role?

Florida Share of Total U.S. Export Value



Source: U.S. Census Bureau, Foreign Trade Division.



Innovation and Economic Development

Florida's Manufacturing Centers



Source: InfoUSA.



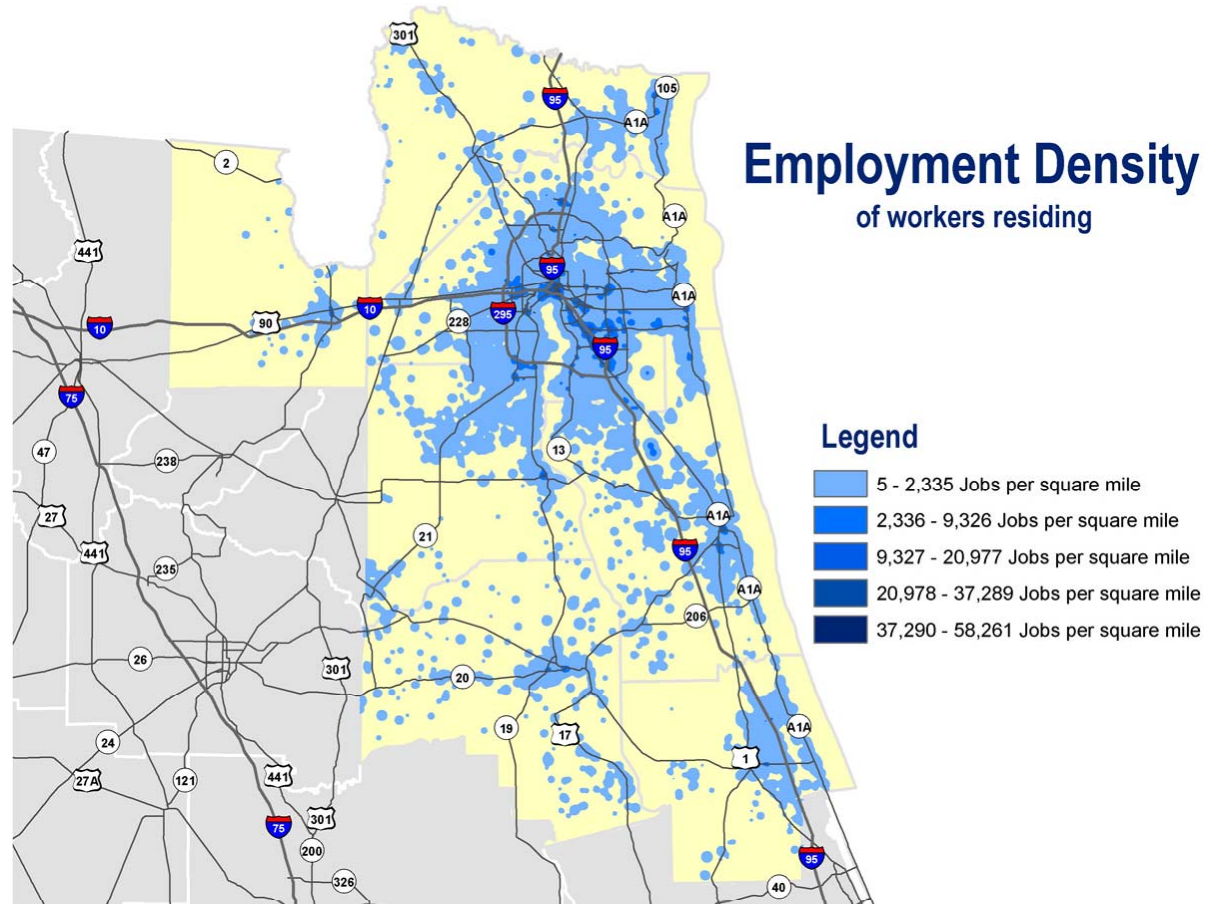
Infrastructure and Growth Leadership

Are We Globally Connected?



Infrastructure and Growth Leadership

Can People Access Jobs and Services?

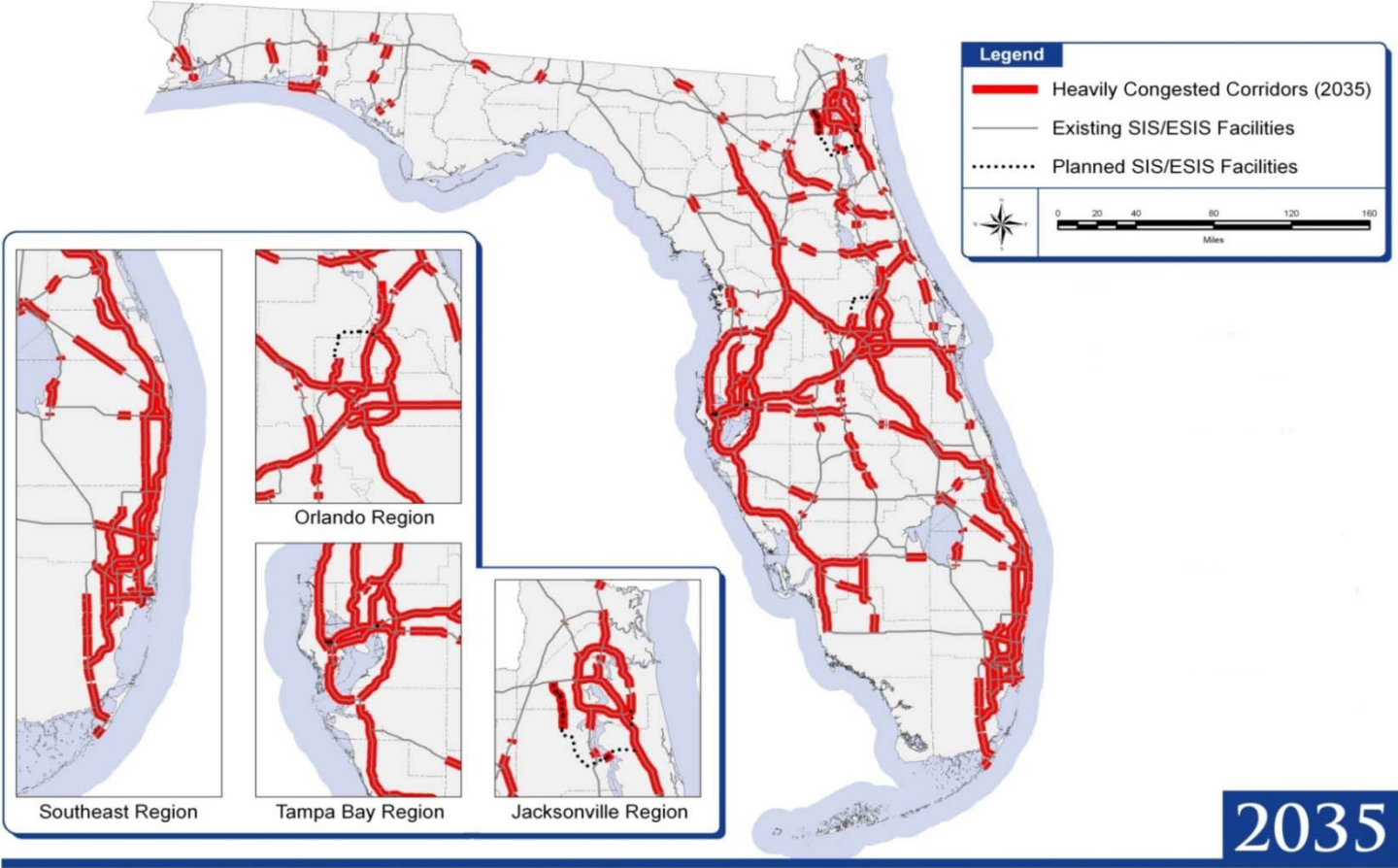


Source: U.S. Census Bureau. Longitudinal Employer-Household Dynamics, Origin Destination Employment Statistics.



Infrastructure and Growth Leadership

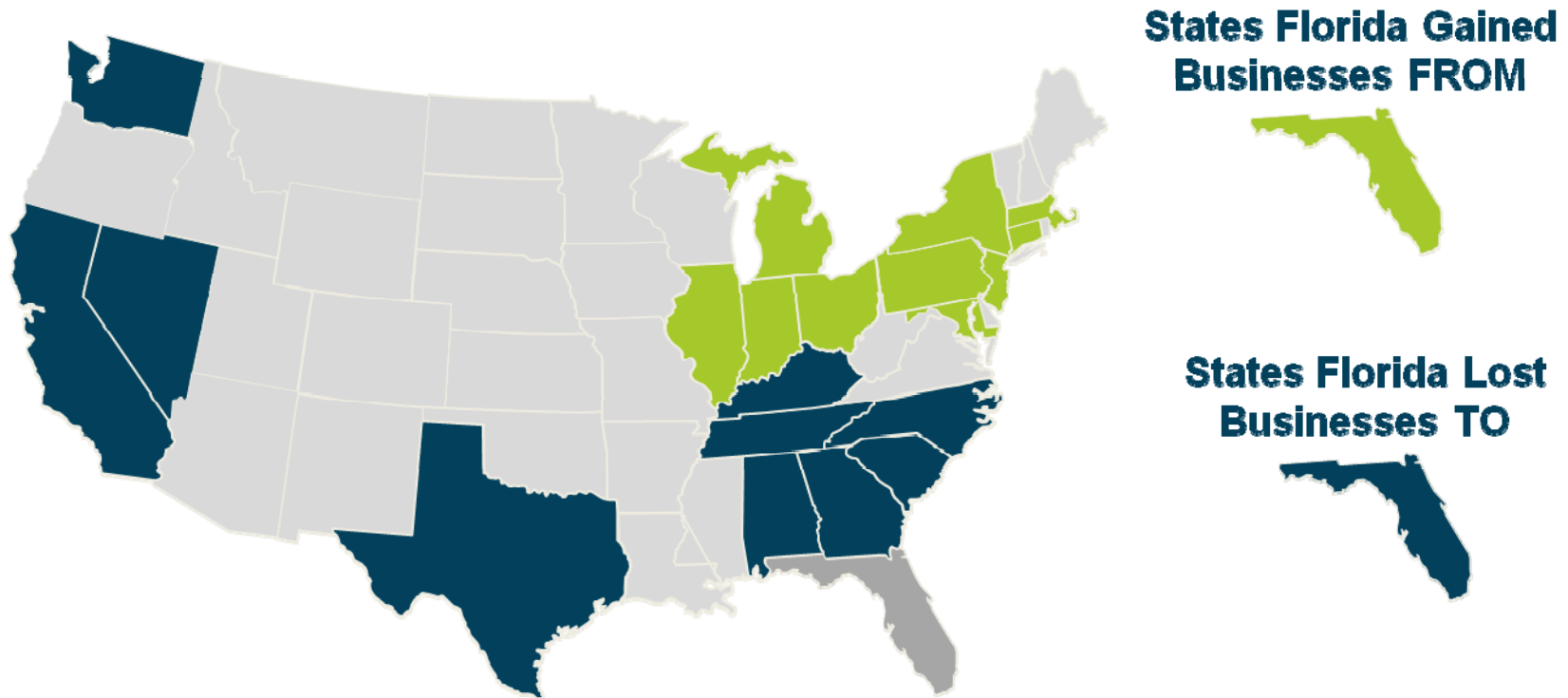
Can We Provide for Future Demand?



Source: Florida Department of Transportation.

Business Climate and Competitiveness

Is Florida Competitive?



Fourth ranked in net new business relocations, 2010

Source: Dun & Bradstreet.



Business Climate and Competitiveness

No Longer a Low-Cost State

11th

- Highest cost of doing business
(*CNBC, 2011*)

97%

- Growth in average health insurance premium per enrolled employee, 2000-2010
(*Kaiser Family Foundation*)

6.3%

- Effective business tax rate as percent of GDP in 2010, up from 4.9% in 2007
(*Council on State Taxation*)



Civic and Governance Systems

Are We Able to Invest in the Future?

5th

- Lowest per capita state and local government employment per capita (*U.S. Census, 2010*)

8%

- Tax supported debt as percentage of revenues in 2009, up from 5% in 2006 (*Florida Division of Bond Finance*)

53%

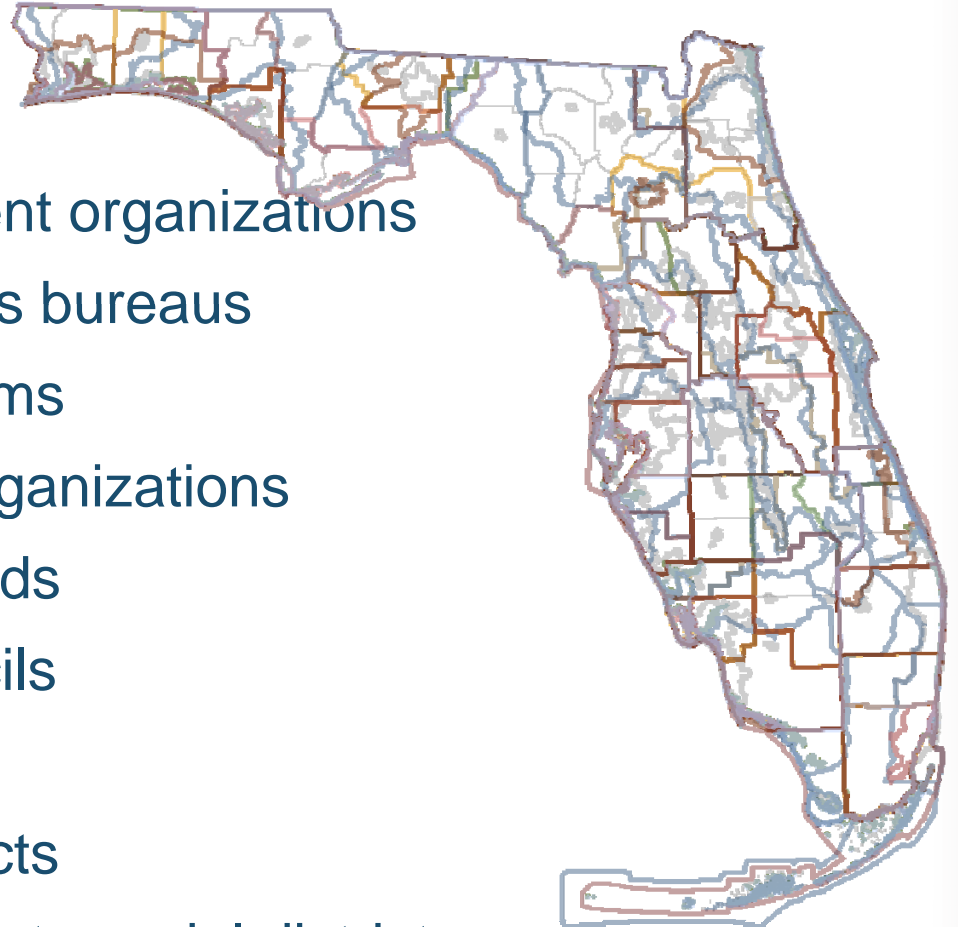
- Increase in number of nonprofit organizations, 2000-2010 (*National Center for Charitable Statistics*)



Civic and Governance Systems

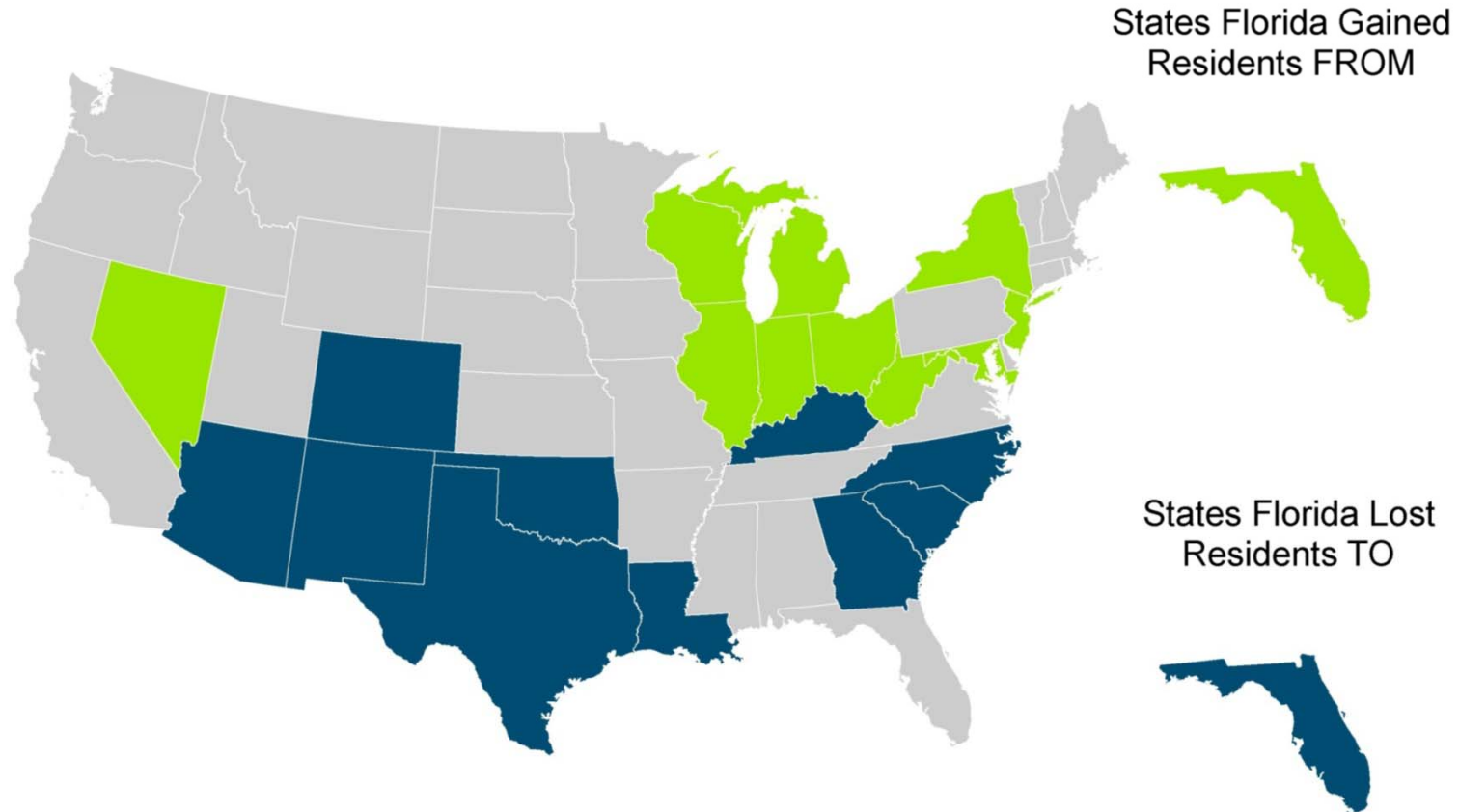
Can the Public Sector Match the Scale of Business?

- 411 Municipalities
- 67 Counties
- ~ 112 Economic development organizations
- ~ 52 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
- 781 Community development special districts



Quality of Life and Quality Places

Is Florida a Destination?



Third ranked in net domestic migration, 2010

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



Quality of Life and Quality Places

Is Florida Attractive?

45%

- Floridians who say the State is worse off than 5 years ago
(Leadership Florida, 2011)

38%

- Floridians spending more than 30% of income on home ownership costs
(U.S. Census, 2011)

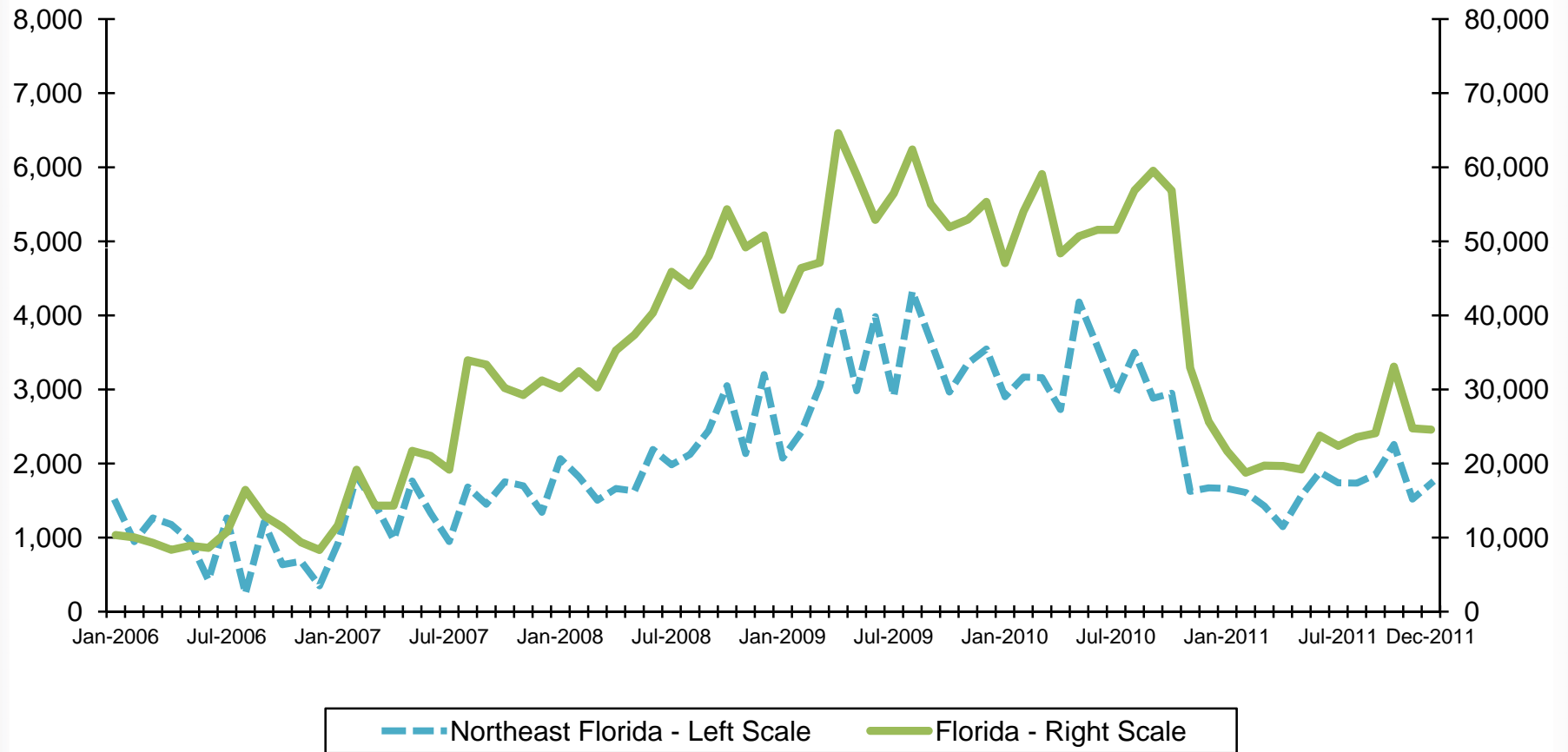
21%

- Percentage of residents without health insurance
(U.S. Census, 2010)



Quality of Life and Quality Places

Monthly Foreclosures in Northeast Florida, 2006-2011

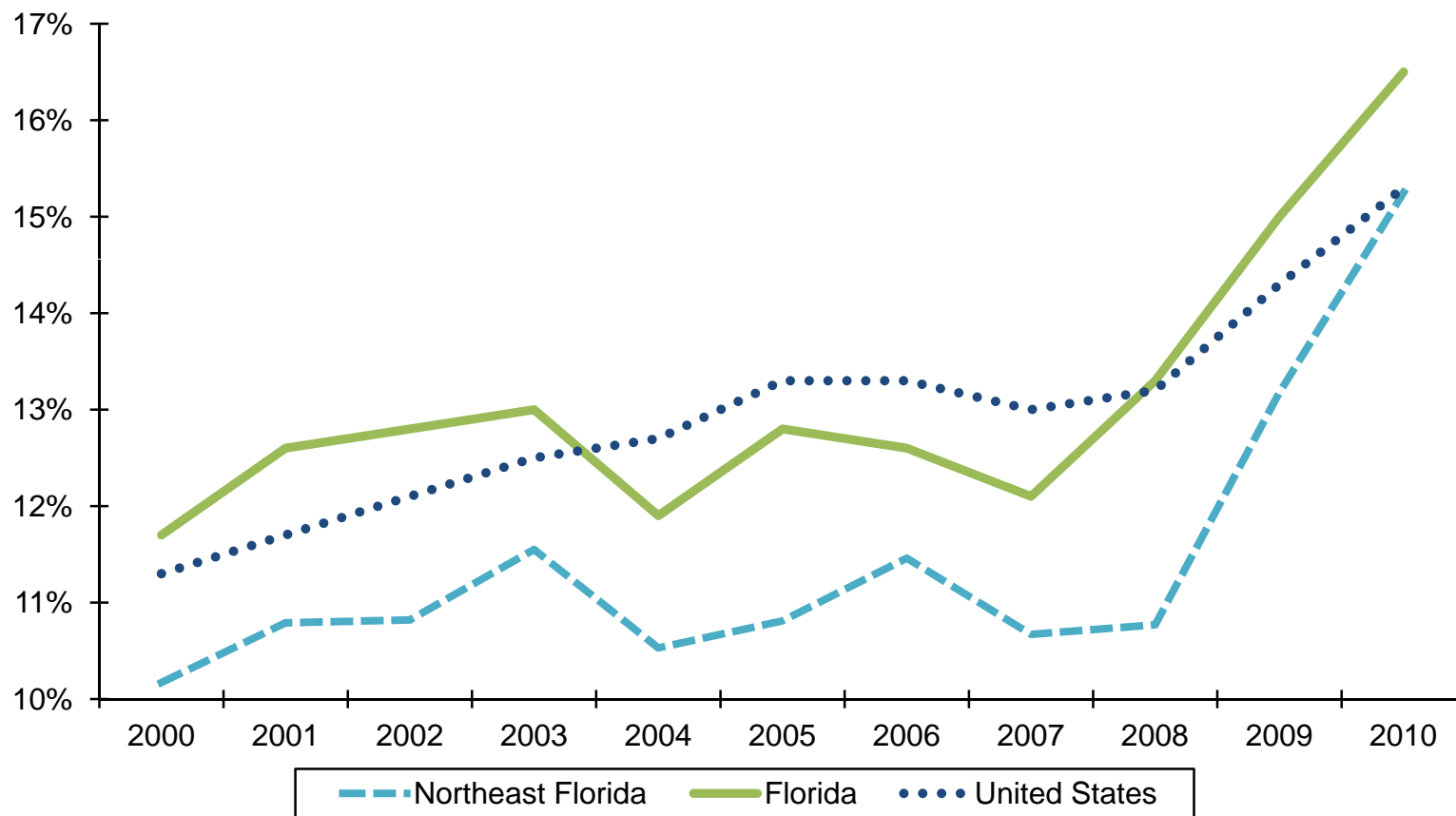


Source: Florida Dept of Economic Opportunity, compiled from RealtyTrac, Inc. Total housing units receiving a filing notice, per month.



Quality of Life and Quality Places

Poverty Rate Is Rising in Northeast Florida



Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE).



Quality of Life and Quality Places

Can We Preserve What Makes Florida Special?



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Questions?

Barbara Foster

Florida Department of Economic Opportunity

850-717-8966 | barbara.foster@deo.myflorida.com

John Kaliski

Cambridge Systematics, Inc.

617-354-0167 | jkaliski@camsys.com



Regional Economic Development Planning Initiatives

Scott R. Koons, AICP
Executive Director

North Central Florida Regional Planning Council &
Economic Development District



Florida's 11 Regional Planning Councils



Florida Regional Councils Association

Partnerships for the Future

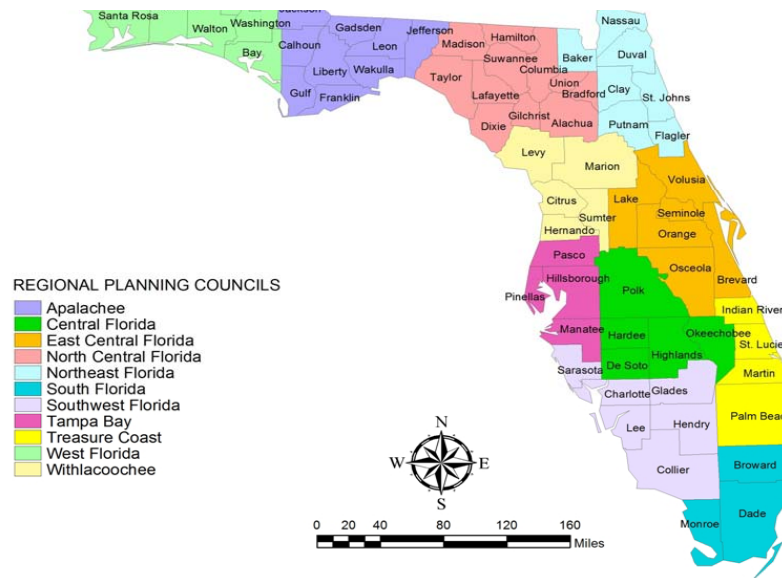
- Strengthen Florida's regional planning councils
- Partners with government and business community to enhance regional economic prosperity
- Improves consistency and quality of regional planning programs adding value to state, regional and local initiatives



Economic Development Districts

Florida's 11 Regional Planning Councils

- Designated by U.S. Department of Commerce, Economic Development Administration as Economic Development Districts
- Charged to develop and adopt a Comprehensive Economic Development Strategy through a Strategy Committee



Florida's Regional Planning Councils

Organization

- Association of local governments
- 2/3 local elected officials
- 1/3 gubernatorial appointees



Florida's Regional Planning Councils

Portfolio

- Economic development planning
- Emergency preparedness
- Homeland security training
- Transportation planning
- Regional strategies
- Geographic information systems mapping
- Local government services



Role of Regional Planning Councils in Economic Development

Regional Planning Councils Complement and Support Local Economic Development Efforts

- Developing and Implementing the Comprehensive Economic Development Strategy
- Providing Grant Writing and Technical Assistance to Local Governments
- Providing Economic Analyses Using Regional Economic Modeling, Inc. Software



Comprehensive Economic Development Strategy = CEDS PLAN

Strategy

- Analyzes regional economy, guides regional goals & objectives, identifies investment priorities and funding sources
- Brings public/private sectors together to develop economic roadmap to diversify and strengthen regional economies
- Serves as vehicle to justify and draw down federal funds



Comprehensive Economic Development Strategy

Strategy Required for U.S. Economic Development Administration Investment Funding

- U.S. Economic Development Administration investments in Florida, 2003 - 2010:
 - \$66 million invested
 - 60 projects
 - 13,700 jobs created/retained
 - \$1 billion in private capital investment



Regional Economic Development Planning Initiatives

Strategy Committee Composition

- Private sector (Majority)
- Public officials
- Community leaders
- Representatives of workforce development boards
- Representatives of institutions of higher education
- Minority and labor groups
- Private individuals



Regional Economic Development Planning Initiatives

Statewide Alignment and Standardization

- Coordination among District Strategies
- Common Data Sets and Measures
- Common Language and Template for all 11 Economic Development Districts
- Uniform Framework



Regional Economic Development Planning Initiatives

SIX PILLARS OF FLORIDA'S FUTURE ECONOMY



Economic Development Districts Comprehensive Economic Development Strategy

Statewide Alignment and Standardization

- **Alignment** with Florida Chamber Foundation's Six Pillars of Florida's Future Economy
- **Alignment** with Regional Economic Development Districts' Comprehensive Economic Development Strategies
- **Alignment** with State's Five-Year Economic Development Strategic Plan



Regional Economic Development Planning Initiatives

Summary

- Support local economic development organizations
- Comprehensive Economic Development Strategy
- Grant writing and administration assistance
- Economic impact analysis



Questions?

Scott R. Koons
koons@ncfrpc.org
352.955.2200



Jerry Mallot

President, JAXUSA Partnership

presented to

**Florida Department of Economic Opportunity
Strategic Plan Regional Stakeholders Forum**

presented by

**Barbara Foster
Florida Department of Economic Opportunity**



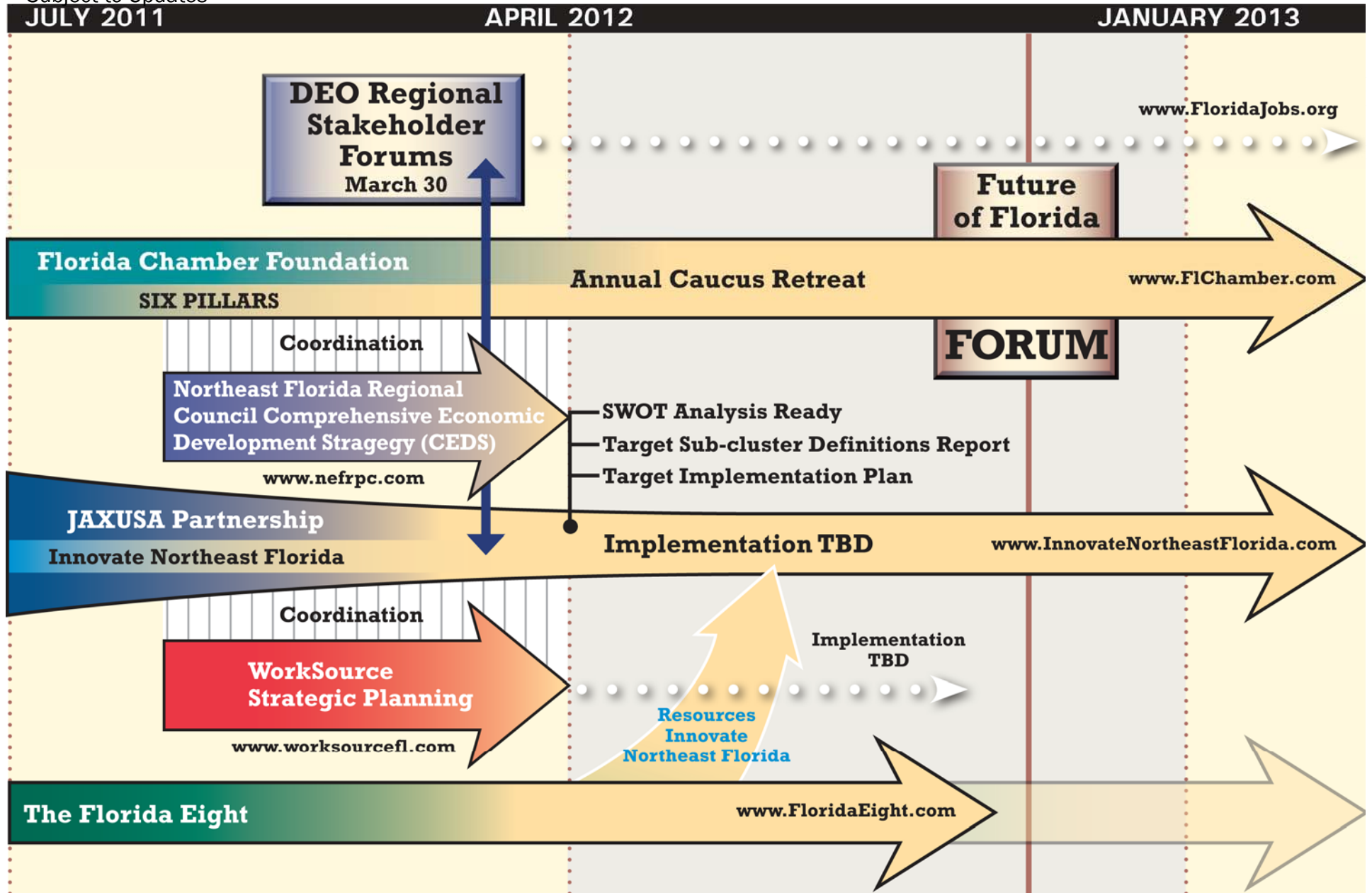
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Strategic Planning/Key Project Map

Prepared by The Florida Eight for Innovate Northeast Florida

Subject to Updates





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ECONOMIC
OPPORTUNITY

Statewide Vision, Goals and Objectives

- Barbara Foster

Department of Economic Opportunity



Statewide Stakeholder Forum

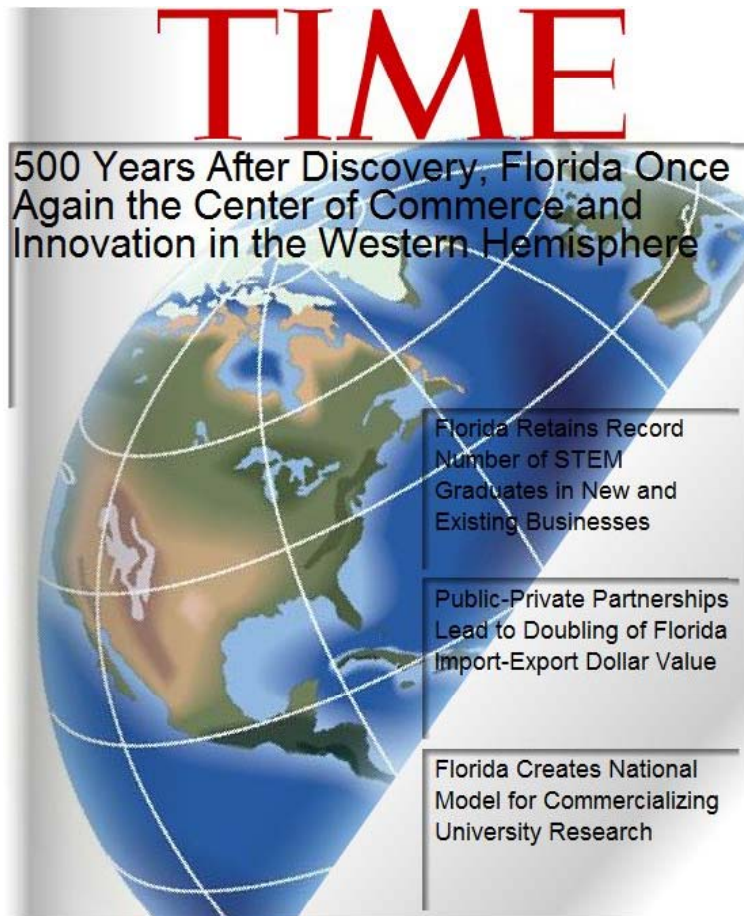
HEADLINES!



Florida in 2017: 'We're Back'



Florida in 2017: We're Global



TIME

500 Years After Discovery, Florida Once Again the Center of Commerce and Innovation in the Western Hemisphere

- Florida Retains Record Number of STEM Graduates in New and Existing Businesses
- Public-Private Partnerships Lead to Doubling of Florida Import-Export Dollar Value
- Florida Creates National Model for Commercializing University Research

“Ranks 10th as a nation state in global economy”

“Doubling of export-import dollars”

“International businesses flock to Florida”

“America’s secret economic weapon against China”



Florida in 2017: We're Innovative

FAST COMPANY

"Sunshine State Revival": Florida leads the global innovation economy



Leads the world in business start-ups and job growth

Recognized as the most efficient transportation and logistics network in the world

Quality communities offer unparalleled opportunities to "live, work, and play"

"Tops California in venture capital deals"

"Leads world in business startups"

"Record number of STEM graduates"

"Replaces Silicon Valley as world class intellectual hub"



Florida in 2017: We're Competitive

Money

Florida is back - voted number one place in the world to visit, live, work, and play!



Florida leads return to jobs through legacy industries and diversification

Florida provides world class gateways for international trade and investment



Florida graduates in high demand for leadership positions worldwide

'Lands 5th Fortune 500 company'

'Number one state for business'

'Leads nation in student performance'

'Most efficient transportation network in the world'

'Paradise for prosperity'



Vision

Page
3

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

*From Research, Plans Analyses,
Statewide Meeting,
and Steering Committee Input*



Goals

Page
3

1. Lead the nation in global competitiveness as a location for business, investment, talent, innovation, and visitors.
2. Become the nation's top performing economy.
3. Provide the nation's leading communities of choice for workers, residents, and visitors.



Ten Objectives

Page
3

- 4 – Employment and Wages (1, 2, 3, & 4)
- 1 – Workforce Development (5)
- 3 – Business Development (6, 7, & 8)
- 1 – Regions (9)
- 1 – Communities (10)



Ten Objectives

Page
3

1. Lead the nation in high quality job creation.
2. Increase employment.
3. Reduce unemployment.
4. Increase prosperity for Florida workers
5. Lead the nation in student performance and market-related workforce skills.
6. Increase business start ups, expansions, and relocations into Florida.



Ten Objectives

Page
3

7. Increase global trade and investment.
8. Lead the nation in business climate, infrastructure, and services to meet the needs of business.
9. Increase competitiveness for all of Florida's regions.
10. Lead the nation in quality of life in Florida's communities.



Six Pillars of Florida's Future Economy™

presented to
Florida Department of Economic Opportunity
Strategic Plan Regional Stakeholders Forum

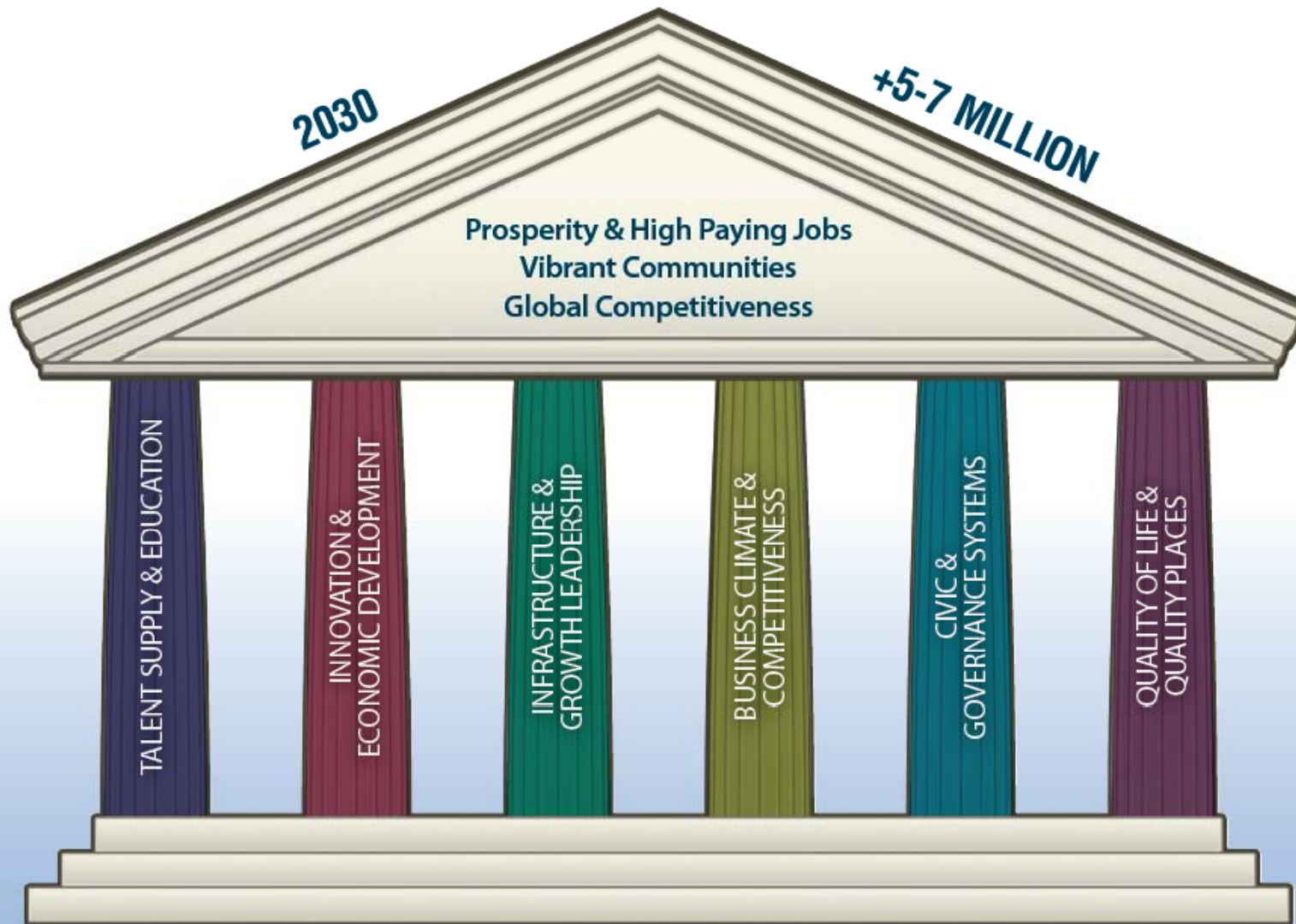
presented by
Stephanie M. Gibbons
Florida Department of Economic Opportunity



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SIX PILLARS OF FLORIDA'S FUTURE ECONOMY



Talent Supply and Education

1. Workforce Training and Retention
2. Pre-K → Higher Education
3. STEM
4. Retirement
5. Etc.



Innovation and Economic Development

1. **Business Growth, Investment, Venture Capital**
2. **Commercialization**
3. **Diversification**
4. **Emerging Technology**
5. **Research and Development**
6. **Start ups**
7. **Trade**
8. **Etc.**



Infrastructure and Growth Leadership

1. **Community Planning**
2. **Conservation**
3. **Construction, Housing, and Land Development**
4. **Disaster Preparedness**
5. **Energy**
6. **Transportation**
7. **Telecommunications**
8. **Water**
9. **Etc.**



Business Climate and Competitiveness

1. Incentives
2. Permitting
3. Regulation
4. Risk Management
5. Start ups
6. Taxation
7. Etc.



Civic and Governance Systems

1. **Boundaries**
2. **Civil Society**
3. **Elections**
4. **Government – Policies, Role, Structure**
5. **Leadership**
6. **Legal System**
7. **Permitting**
8. **Tax Policy**
9. **Etc.**



Quality of Life & Quality Places

1. Affordable Housing
2. Arts and Culture
3. Community Resources
4. Diversity
5. Environment
6. Family Wellness, Health Care
7. Public Safety
8. Tourism
9. Etc.



Strategies Review and Suggestions Breakout Sessions

presented to

**Florida Department of Economic Opportunity
Strategic Plan Regional Stakeholders Forum**

presented by

**Stephanie M. Gibbons
Florida Department of Economic Opportunity**



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Six Breakout Groups

Identify strategies that are important for the STATE to undertake.

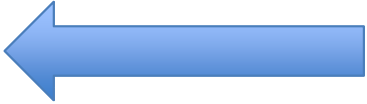
1. Review “starter list” of strategies.
2. “Fix” the list and add to it.
3. Prioritize these strategies.
4. Share your top priorities with the large group.

What should the state do (or stop doing) that would best benefit local and regional economic development efforts?



SIX PILLARS OF FLORIDA'S FUTURE ECONOMY

Lunch is next door
in room 107B



2030

+5-7 MILLION

Prosperity & High Paying Jobs
Vibrant Communities
Global Competitiveness

TALENT SUPPLY & EDUCATION

INNOVATION &
ECONOMIC DEVELOPMENT

INFRASTRUCTURE &
GROWTH LEADERSHIP

BUSINESS CLIMATE &
COMPETITIVENESS

CIVIC &
GOVERNANCE SYSTEMS

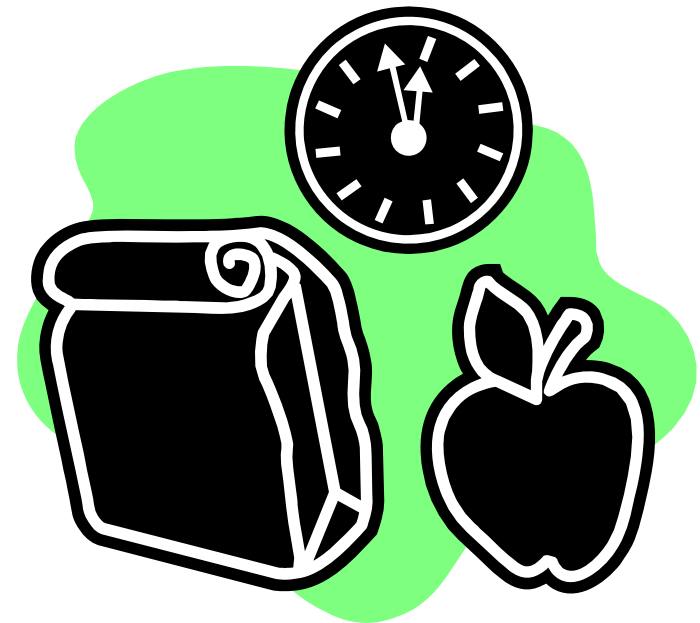
QUALITY OF LIFE &
QUALITY PLACES

107B 107A 211B
105 211A 107B

Breakout Group Locations

Lunch!!!!

1. Pick up your lunch.
2. Eat with your breakout group.
 1. Talent
 2. Innovation
 3. Infrastructure
 4. Business
 5. Civic
 6. Quality



Go Forth, Eat, and Brainstorm!

Eat with your breakout group.

1. Talent
2. Innovation
3. Infrastructure
4. Business
5. Civic
6. Quality

