CHARLOTTE - COLLIER - GLADES - HENDRY - LEE - SARASOTA

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

PLAN 2012-2017

Southwest Florida Regional Planning Council
Economic Development District Since 1992

Southwest Florida Comprehensive Economic Development Strategy

2012-2017

Southwest Florida Regional Planning Council

SWFRPC Plan Protect Improve

Southwest Florida Comprehensive Economic Development Strategy

2012-2017

September 2012

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STRATEGY REPORT

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Council's Mission is to work together across neighboring communities to consistently protect and preserve the unique character of the region's environment, strengthen its economy, and improve its social world for the benefit of future generations.

Economic Development Administration Mission

To lead the federal economic development agenda by promoting innovation and competitiveness, preparing American regions for growth and success in the worldwide economy.

Department of Economic Opportunity Vision

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

Economic Development District CEDS Vision Statement

Southwest Florida's economy shall grow and diversify through expansion of existing business and attraction of new businesses that embrace and advance the region's attributes of high quality environment, education, and culture.

EXECUTIVE SUMMARY

Executive Summary

This document, the Comprehensive Economic Development Strategy (CEDS), is the 5th edition of the Region's vision for economic development. In 1992, the Southwest Florida Regional Planning Council, consisting of Charlotte, Collier, Glades, Hendry, Lee and Sarasota Counties, was designated a federal Economic Development District (EDD). This designation qualifies the region for funding assistance from the U.S. Economic Development Administration (EDA) through its public works, economic adjustment, and planning programs. To be eligible for this funding, EDDs must develop a Comprehensive Economic Development Strategy. Since 1992, the Southwest Florida Regional Planning Council's EDD has leveraged its CEDs into over $110 million of public and private investment in Vital Projects for our Region.

The U.S. Economic Development Administration's mission is to invest in projects and programs that provide a foundation for sustainable job growth and the building of durable regional economies. This foundation relies on two key economic drivers - innovation and regional collaboration. The EDA awards funds through a competitive grant process that considers each project's level of innovation and regional collaboration. To facilitate evaluation, EDA has established the following six investment priorities for funding opportunities:

1. Collaborative Regional Innovation
2. Public/Private Partnerships
3. National Strategic Priorities
4. Global Competitiveness
5. Environmentally-Sustainable Development
6. Economically Distressed and Underserved Communities

The process used to develop the CEDS was a series of 9 public workshops where 138 attendees gathered and discussed and developed 141 projects and 24 priority projects. Results from each workshop were used to develop goals and strategies.

The SWFRPC's role included the facilitation of the Regional Oversight Committee and the CEDS Working Committee. The Regional Oversight Committee recommended approval of the 2012 CEDS Plan with minor updates. On Thursday, September 20, 2012, the full Council unanimously approved the 2012 CEDS Plan for submission to EDA.

The CEDS Working Committee, comprised of regional economic development partners, established seven Vital Program Areas that capture most of the projects submitted by the local governments, stakeholders and residents. These 7 Vital Program Areas incorporate EDA's 6 investment priorities and the Florida Chamber Foundation's 6 Pillars framework, which has been adopted by the Florida Department of Economic Opportunity, the details of which are included in the full CEDS document (see Table 1).

The result is 17 Vital Projects, 26 Important Projects and 12 Future Projects; the combined economic value of the 17 Vital Projects exceeds $ 133 million. The 5th edition of the CEDS provides the region a collaboratively developed road map for funding and implementation of these economic development projects.

The next step in the process is submission to EDA for approval. Once the 2012 CEDS Plan is endorsed, implementation will begin of the vital projects by the various partners.

SWFRPC Plan Protect Improve

The CEDS Working Committee voted to adopt the Florida Department of Economic Opportunities (DEO) five year statewide strategic plan (Table 2, page 3) vision, goals, objectives and strategies to further the region's five year plan.

Table 1: Southwest Florida Regional Planning Council CEDS Five Year Plan

Comprehensive Economic Development Strategy (CEDS) for Southwest Florida (2012 -2017)

Vision	Southwest Florida's economy shall grow and diversify through expansion of existing businesses and attraction of new businesses that embrace and advance the region's attributes of high quality environment, education, and culture.						
	At-A-Glance						
	Talent Supply & Education	**Innovation & Economic Development**		**Infrastructure & Growth Leadership**	**Business Climate & Competitiveness**	**Civic & Governance Systems**	**Quality of Life & Quality Places**
Goals	1.1: Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development. 1.2: Ensure educational systems and workforce training that support innovation and creativity.	Goal 2.1: Provide funding for ongoing economic development activities. Goal 2.2: Provide technical assistance and use new technology to promote job growth. Goal 2.3: Build seamless information technology infrastructure.	Goal 2.4: Encourage alternative energy production and green product industries. Goal 2.5: Brand the region as a hub to attract and retain entrepreneurs.	Goal 3.1: Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment. Goal 3.2: Develop a strong export economy.	Goal 4.1: Encourage local governments to adopt streamlined development approval procedures. Goal 4.2: Monitor CEDS Performance Measures. Goal 4.3: Develop projects and programs that support existing and new business. Goal 4.4: Increase investment in business development and placement in the region.	Goal 5.1: Improve coordination of economic development, land use, infrastructure, water and natural resource decision making. Goal 5.2 - Improve public/ private/civic cooperation, collaboration, and communication of the region's economic strategies.	Goal 6.1: Protect natural resources to support quality environment and eco-tourism. Goal 6.2 - Develop projects that improve the region's quality of life.
Objectives	See 2012 CEDS Plan - Section B. Goals and Objectives - Building the Pillars for details, page 22-23.						
Programs	Regional Education and Training Focus	Regional Entrepreneurial Support	Industry Cluster Development	Regional Infrastructure	Global Competitiveness	Regional Guidance and Collaboration	Regional Innovation
Program Description	Stem, Technology Schools and Workforce	Incubators, Regional One Stop, Economic Gardening	Agricultural Sustainability, Economic Centers and Regional Sports Destination	Utilities, Transportation, Technological and high-speed Interconnectivity, Waterways, Airports, Disaster Preparedness, Infill housing/ redevelopment projects, Brownfield remediation/ redevelopment	Position the Region to compete on a regional, national and global level		Sustainable, place-making projects that improve the quality of life in the region, downtown / urban area development
Vital Projects	Develop Material Handling Industry of America (MHIA) Training Center for Logistics/Manufacturing Regional Pre-Machining Training Repositioning the talent delivery system in the Southwest Florida Region	Charlotte County Expansion of the Immokalee Business Development Center AirGlades Airport Development Logistics Center (America Gateway Logistics - Phase 1) Southwest Florida International Airport Improvements	Research and Enterprise Diamond Mote Marine in Punta Gorda Murdock Village	Regional Transportation Plan	Establish partnerships for the creation of a Regional Economic Development Agency to promote centralized data and regional marketing efforts	Create an Ad-Hoc Committee to evaluate and recommend legal & regulatory reform to address government efficiency.	Prepare a regional plan and identify place-making projects that improve the quality of life Warm Mineral Springs Fort Myers Riverfront Redevelopment Project
DEO Strategy	*Connect and align education and workforce development programs to develop and retain Florida's current and future talent supply chain and meet employer needs.*	*Grow, sustain, and integrate efforts related to R&D, technology commercialization, and seed capital to create, nurture and expand innovation businesses.*	*Strengthen Florida's leadership in expanding and emerging industry clusters and help transition established clusters to serve new markets.*	*Coordinate decision-making and investments for economic development, land use, infrastructure, water, energy, natural resources, workforce and community development at the statewide, regional and local levels*	*Ensure state, regional and local agencies provide collaborative, seamless, consistent and timely customer service to businesses.*	*Support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life goals.*	*Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors.*

Revised 9/12/2012

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

A. Background

Since its designation as an Economic Development District (EDD) in 1992, the Council has worked to promote economic development in the six-county region (Charlotte, Collier, Glades, Hendry, Lee and Sarasota) that it serves. The Council has accomplished this by working closely with the cities and counties in the region and by implementing its work program that is submitted annually in the funding application to the EDA.

During the past five years, the Council has undertaken a number of efforts in collaboration with its CEDS Working Committee (Committee), which was formerly known as the Economic Development Strategy Committee, and is composed of representatives from throughout the region.

The mission of the Committee is to share information and to address problems concerning economic development whenever possible from a regional perspective. These efforts will continue and are expected to increase based on the range of projects identified in this Comprehensive Economic Development Strategy (CEDS).

The Council staff maintains the SWFRPC website and project portal where most of this information is available . For more information visit: www.swfrpc.org. The Council and its Committees will continue to facilitate and update website content related to economic development.

In addition, Council staff responds to a variety of individual requests for information from communities, businesses, individuals, public and community organizations. Most of these requests are handled by telephone and e-mail.

Council staff has continued to work closely with local economic development organizations (public and private) to assist in the implementation of their programs and projects. Staff alerts local communities and economic development organizations of available programs that willl assist in meeting their economic goals.

CEDS PURPOSE AND PROCESS

The purpose of the CEDS is to bring together the public and private sectors for the creation of an economic roadmap that will diversify and strengthen regional economies. The CEDS analyzes the regional economy and serves as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources. The CEDS integrates the region's human and physical capital planning in the service of economic development. An integrated economic development planning process provides the flexibility to adapt to global economic conditions and fully utilize the region's unique advantages while maximizing economic opportunities for its residents. This is achieved by attracting the private investment that creates jobs for the region's residents. Finally, the CEDS provides a useful benchmark by which the regional economy can evaluate opportunities with other regions in the national economy.

The process of creating the CEDS requires a continuing economic development planning process developed with a broad-based and diverse public-private sector participation effort and coupled with a set of goals and objectives that solves the economic development problems of the region and that clearly define the metrics of success.

EDA regulations require that the existing CEDS be updated annually and that a new CEDS be developed at least once every five years, or whenever substantial changes in the regional economy render the existing document obsolete.

STATEWIDE STRATEGIC PLAN REGIONAL FORUM

In order to develop this CEDS, a series of public workshops were held. On March 6, 2012, a regional forum was held by the Florida Department of Economic Opportunity (DEO) at Florida Gulf Coast University in its effort to create a five-year economic development plan for the state. The DEO and CEDS plans both were created utilizing the Six Pillars of Florida's Future Economy framework which focuses on critical factors that will be determining Florida's future: (1) Talent Supply & Education, (2) Innovation & Economic Development, (3) Infrastructure & Growth Leadership, (4) Business Climate & Competitiveness, (5) Civic & Governance Systems and (6) Quality of Life & Quality Places. See Table 2 for DEO's five year plan.

Table 2: DEO Five Year Statewide Strategic Plan

Florida Strategic Plan for Economic Development
July 2012 – June 2017 *(V16, www.floridajobs.org/FL5yrPlan)*

At-A-Glance

Vision
- Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, 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 employment in Florida.
- Expand global commerce.
- Foster opportunities for prosperity.
- Increase Florida's attractiveness to workers, residents and visitors.
- Grow businesses.

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. **Connect economic development, talent, infrastructure, partnerships and other resources within and 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 & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
5. Align education and workforce development programs 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 science, technology, engineering, and mathematics (STEM) 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 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, 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. Renovate permitting, development, and other regulatory processes to meet changing business needs and provide a predictable legal and regulatory environment.** 19. Ensure state, regional and local agencies provide collaborative, seamless, consistent and timely customer service to businesses. 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, businesses, residents 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.

CEDS PUBLIC WORKSHOPS 2012 INVOLVEMENT

A critical goal of the comprehensive public engagement process implemented for the development of the CEDS is to position our region for positive change. This process identified investment priorities and developed consensus on economic development projects that need to be accomplished over the next five years in our region in order to build Prosperity, High Paying Jobs, Vibrant Communities and Global Competitiveness. The workshops included significant public input and utilized interactive voting devices to develop consensus with participants.

The public workshops included 9 meetings, 138 attendees, 141 projects and 24 priority projects. All the results from the CEDS public workshops are posted on the website at: www.swflregionalvision.com/CEDS.html. See Table 3, 4, 5 and Illustration 1 for results and the timeline.

Table 3: Results from the Eight Public Meetings

COLLIER	CHARLOTTE	GLADES	HENDRY	LEE	SARASOTA	SEMINOLE
Identify economic benefits of environmental restoration projects (clean air/clean water).	Murdock Village and technology park entertainment district	Logistics Center	Infrastructure from Airglades Airport to City of Clewiston	Need a comprehensive regional economic development entity with sustainable funding source (Business Climate & Civic)	Regionalization of Tourist Destination Sites	Economic alternatives to strengthen the tribe
Make broadband available everywhere.	Provide intra-state connections within the state and regional airports	Infrastructure - Water, Sewer, Electric	4 lane SR 80	Immigration Policy	Toledo Blade Blvd. Extension	Signature Projects (Motocross Track, Billy Swamp Safari)
Focus on STEM in education and fill in gaps.	Business incubator supported by universities	Tourism – Harney Pond Canal	Upgrade youth athletic facilities – sports destination	Business development in solar	Warm Mineral Springs	Tourism – centralized marketing (Innovation & Business Climate)
				Improve & maintain regional water quality		
				Leeland Lake Signature Project (Lehigh Acres)		
				Uniqueness of SWFL needs to be identified to target best businesses		

Education	*Economic Development*	*Infrastructure*	*Environment*	*Marketing & Tourism Related*


Charlotte County - April 25, 2012


Hendry County - May 3, 2012


SarasotaCounty - May 1, 2012


Glades County - April 26, 2012


Seminole Tribe of Florida - May 3, 2012


Lee County - April 30, 2012


Collier County - May 9, 2012

2012 CEDS PLAN PROCESS

Illustration 1: 2012 CEDS Plan Timeline

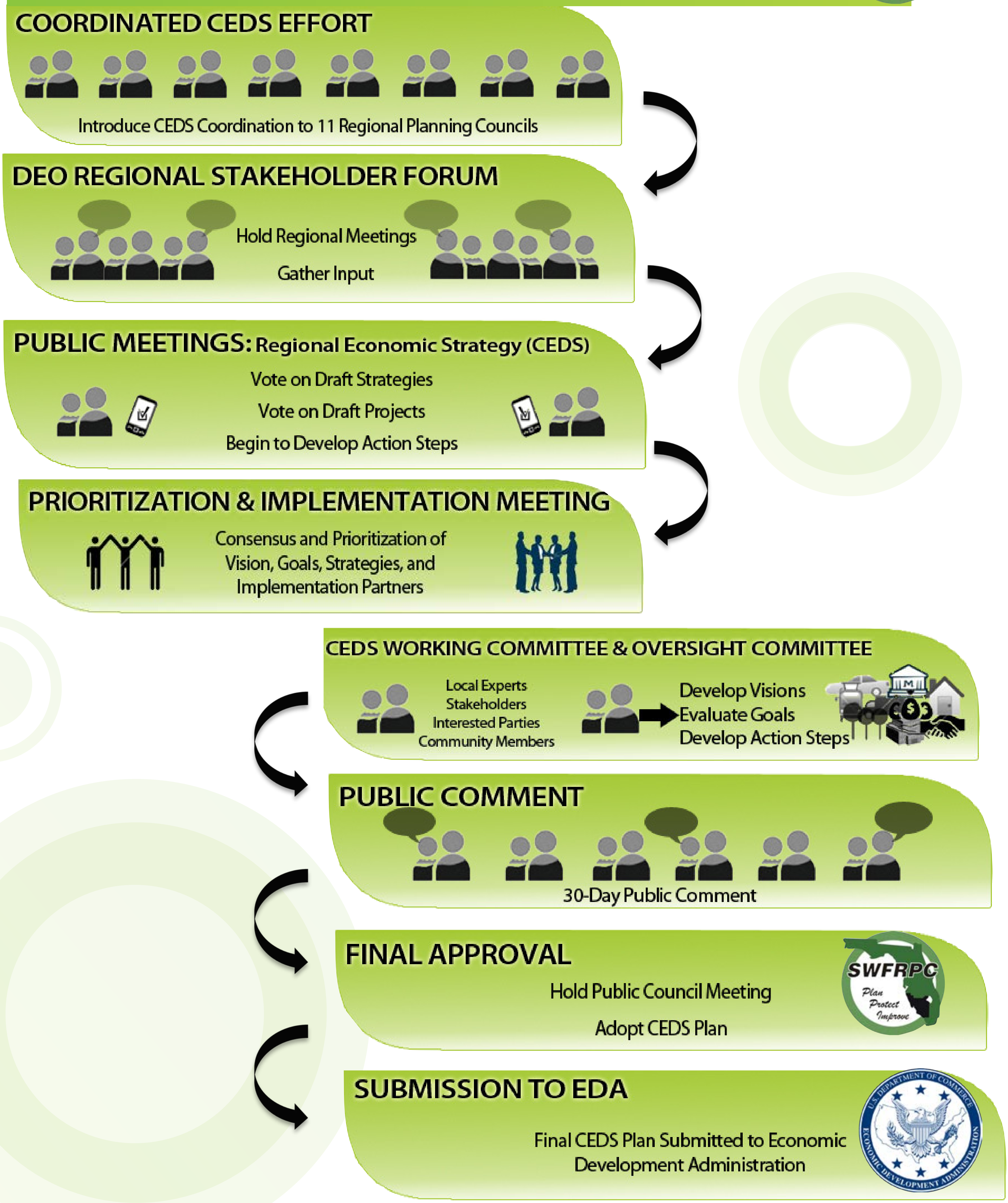


Table 4: CEDS Development Schedule 2012
CEDS Working Committee & Oversight Committee

June 1st	• DEO Draft Plan and FRCA Template • Review Vital Projects From The Communities • Identify Working Committees Additional Economic Development Vital Projects • Prioritize Projects (CEDS Working Committee & CEDS Interested Individuals)
June 22nd	CEDS Plan Of Action: Identify Who Is Responsible For Implementation Of The Vital Projects & Potential Costs
July 20th	Vital Project Prioritization Overview
August 31st	Review Public Comments And Approve Final CEDS 5-year Plan; Submit To Strategy Committee

Table 5: Results from the June 1st CEDS Working Committee

Agricultural Sustainability (Develop a strategy for the region, Food Deserts and Food Availability)	Medical Tourism: Regional, Cooperative Buying, Networking. Examples, LeeSar, Veterans Hospital. Study on how to attract Medical Tourism Education	Education/Training Regional Focus (High School Level, AA Level, Expand Education, Workforce not ready with curriculum, skilled programs need to realign with technology schools. Needs to be more than just STEM, more training centers)	Regional Sports Destination: market regionally as attraction destination and to industry (i.e. sports teams) How to keep people active	Entrepreneurial Support Organizations - ESO Regional Level. Regional umbrella for support entrepreneurs
Academic Village - University Tech Park (Cape Coral) Infrastructure needed: Roads, Piping, Technology	Piper Road Extension (I-75 to SR 17)	Toledo Blade	Research and Enterprise Diamond: I-HUB	Riverfront Redevelopment - Convention Center - Regional (Expansion of Harborside)
Cluster Strength in Region. Target Industries Study for the Region	Pine Island/Burnt Store Road Future Expansion development projects (Charlotte & Lee)	Regional Transportation Plan - not just LRTP (20-30 year plan) Overarching System to measure quality in the region	Economic Gardening	Educational Institute Credits to float between entities (STEM)
International Trade - Better market imports/exports business	Marginal Populations (Criminal Justice System, Workforce Development Issue, Economic Dev. Issue)	Quality of Life/Places: Development Pattern	Access to Healthy Foods - Strategy	Aging in Place - Strategy
Reverse Brain Drain - keep educated workforce here	Broadband Regional Project	Brownfields	Healthy Communities, Get Region Healthy	Wetlands Remediation - Zoning
State Constitutional amendment. Eminent Domain	Regional Discussion on Development - Transfer of Rights	Pre-Platted communities (Leg Priorities) Needs permissions for lands to be assembled together (Address at State Level for SW FLA)	Waterway Connections - How do we develop Regional Assets. Market Cross Counties Waterways	

Education	*Economic Development*	*Infrastructure*	*Environment*	*Quality of Life: Marketing & Tourism Related*

Community and Private Sector Participation - The Six Pillars Caucus System and Comprehensive Economic Development Strategy Development

COMMUNITY AND PRIVATE SECTOR INVOLVEMENT

The Council was designated an Economic Development District (EDD) by the Economic Development Administration (EDA) in 1992. The Council has an Economic Development CEDS Working Committee that meets to share information on programs and projects. With representatives from each of the six counties in the region, the Committee discusses problems or issues of importance to the entire region. Members also share information regarding programs they have developed or utilized to resolve local issues. As a result, the Committee serves as a network allowing members of the various economic development organizations to meet and discuss situations that are similar throughout the region.

Community and the private sector input was critical to the successful development of the Southwest Florida CEDS. Throughout the development of the 2012 CEDS, staff and the CEDS Working Committee have gathered input and advice from community groups and private sector representatives throughout the six-county region. Each Committee meeting was an open public meeting that welcomed business owners, citizens, elected officials and media representatives along with the diversified representation of the committee. Public workshops were held in several communities in the region and each meeting was very well attended.

A interactive analysis was conducted at each public workshops and information gathered during this process was used to develop the 2012 CEDS. The CEDS was made available to the public for thirty (30) days to review and comment. Input from this public comment period was taken into consideration prior to the completion of the plan.

Regional economic development planning efforts and technical assistance are handled primarily through the Council (see Illustration 2). The Council and the many economic development organizations work closely with the regional universities and colleges. Florida Gulf Coast University, Hodges University and Edison College are important participants in the overall regional economic development process and provided expertise and studies. In addition, the regional economic development organizations are currently working with the universities and colleges to develop key training and degree programs to meet the future regional employment needs.

Provided below are snapshots of the region's economic development organizations :

Charlotte County Economic Development

In 2001, the Charlotte County Board of County Commissioners established the Economic Development Office (EDO) to focus on the recruitment of high impact industry to Charlotte County facilitating the creation of high skill, high wage jobs, and to help diversify the economy and tax base. Over the years, the EDO has broadened its mission to include Business Expansion and Retention as well as building an Entrepreneurial Support network to nurture innovation and startups. The EDO staff provides support to the Enterprise Charlotte Economic Council (ECEC); the Enterprise Charlotte Foundation; and the Charlotte County Industrial Development Authority. The ECEC, a 501 (c) (6) organization was established in 2008 to provide a funding vehicle for businesses to invest in the long-term economic vitality of Charlotte County. The focus of the ECEC is to expand economic development opportunities locally and to develop partnerships at the regional, state and national level that will encourage business growth.

For more information visit: http://www.floridasinnovationcoast.com/

Collier County

Collier Business and Economic Development office is a resource for Collier County to provide opportunities for unparalleled growth to new and expanding businesses.

For more information, please visit: http://www.colliergov.net

Presently the Greater Naples Chamber of Commerce has assumed responsibility and manages program development and growth associated with various opportunities related to relocating/starting a business and growing your business.
For more information, please visit: http://napleschamber.org/

Glades County Economic Development Council

The Glades County Economic Development Council (EDC), Inc. was established in 1999, and is a public private-partnership receiving funding from Glades County, the City of Moore Haven and members. The mission of the Glades County EDC is to promote new commercial and industrial development while protecting the quality of life residents enjoy.

For more information visit: http://www.gladescountyedc.com/

Hendry County Economic Development Council

Hendry County Economic Development Council (HCEDC), incorporated in 1997, actively works to improve the economic stability and tax base of Hendry County, enhancing economic opportunities, personal income, and the quality of life of the citizens of Hendry County. HCEDC coordinates business development activities, including the creation and/or attraction of new businesses, development and expansion of minority businesses, and the encouragement of existing businesses to remain and expand within Hendry County.

Lee County - Fort Myers Regional Partnership

The Fort Myers Regional Partnership – Lee County's Economic Development Office (EDO) – was created to bring new companies to the area and help existing businesses grow and expand. The EDO staff also provides support to Lee County's Horizon Council, Horizon Foundation and Industrial Development Authority.

Lee County has an umbrella economic development organization called the Horizon Council. The Horizon Council consists of representatives from area businesses and local governments and is staffed by the Lee County EDO, a county agency. The Horizon Council serves as an advisory board to the Lee County Board of County Commissioners.
For more information visit: http://www.fortmyersregionalpartnership.com/

Cape Coral Economic Development

Another group that is active in Lee County is the City of Cape Coral's Economic Development Office. The staff of this office works with potential new businesses to the city and provides technical assistance as needed to new and existing businesses. The city currently operates a Revolving Loan Fund with its CDBG funds.
For more information visit: http://www.capecoral.net/en-us/business.aspx

Fort Myers Economic Development Office

The Fort Myers Economic Development Office is responsible for coordinating and implementing economic development activities with the Fort Myers Regional Partnership for Economic Development and regional partners. The City recognizes its role in the regional economy of Southwest Florida as a leading urban core as a transportation, education, health care, and industrial center. Economic development and redevelopment programs offered enrich the regional economy and diverse cultural opportunities present to provide a sustainable and prosperous environment to live, work, and play in the City of Fort Myers.
For more information visit: http://www.cityftmyers.com/

Economic Development Corporation Sarasota County

The Economic Development Corporation of Sarasota County is the professional economic development entity for Sarasota County. It is a non-profit, public/private partnership that assists existing companies with expansions, attracts and retains quality jobs, solicits new businesses compatible with the assets and values of Sarasota County, promotes Sarasota County's business image, and enhances Sarasota County's overall quality of life.
For more information visit: http://www.edcsarasotacounty.com/

North Port Economic Development Division

The City of North Port Economic Development Division (Division) is responsible for the implementation of the City's economic development strategic plan, its marketing strategy and business attraction, retention and expansion activities. The Division also works closely with local and regional partners to promote the economic development goals and strategies of the Southwest Florida Region and its unique communities. As the largest city in Sarasota County, North Port recognizes its role as an important leader in promoting regional cooperation and collaboration even as it continues to develop new business and development opportunities within its boundaries. North Port's economic development efforts have been recognized locally and statewide because of strong support from its engaged citizenry and its elected leaders.
For more information visit: http://cityofnorthport.com

Empowerment Alliance of Southwest Florida

Another partner is the Empowerment Alliance of Southwest Florida, a non-profit organization created to administer the strategic plan for the federally designated Round II Enterprise Community encompassing Immokalee and eastern Hendry County. The Empowerment Alliance focuses on four main areas: education and job training, economic development, affordable housing, and community image. The Empowerment Alliance works closely with its community partners to undertake and implement projects in these four areas.

Southwest Florida Workforce Development Board

The Southwest Florida Workforce Development Board, Inc., is a public/private non-profit organization that administers and coordinates workforce related programs for the state. It operates career and service centers through-

out the region, providing a single point of contact for employers and workers to connect.
For more information visit: http://www.swflworks.org/

FHREDI (Florida Heartland Rural Economic Development Initiative)

Glades, Hendry and Immokalee participate in the Florida Heartland Rural Economic Development Initiative (FHREDI) and the Rural Area of Critical Economic Concern. Florida's Heartland REDI, Inc. provides economic development coordination to businesses interested in expanding or relocating to inland, South Central Florida. Working with local partners within the region, as well as Enterprise Florida, Inc., Workforce Florida, Inc. and the Governor's Office of Tourism, Trade and Economic Development, FHREDI will provide your company with site selection, incentives and workforce training assistance.
For more information visit: http://www.flaheartland.com/

The Southwest Florida Regional Technology Partnership (Tech Partnership)

The Southwest Florida Regional Technology Partnership (Tech Partnership) is a 501(c)6 not for profit organization dedicated to building the technology sector in Southwest Florida by supporting existing technology companies and professionals to address their challenges. The Tech Partnership works with economic development and educational organizations to make sure the environment is right for new companies and professionals to move to the area. In pursuit of it's mission, the Tech Partnership will Catalyze, Cultivate and Connect our community organizations, tech sector and other resources.
For more information visit: http://www.swfrtp.org.

Alliance of Educational Leaders

The Alliance of Educational Leaders is a network of the CEOs of the regionally accredited, non-profit, Pre-K through post-secondary educational institutions. Members include the school district superintendents of Charlotte, Collier, Glades, Hendry and Lee Counties; the presidents of Edison State College, Florida Gulf Coast University, and Hodges University; and the campus presidents of Barry, Keiser, and Nova Southeastern Universities. A strong partner with the SWFL Workforce Board, the Alliance seeks to create a seamless web of educational opportunities; model regional collaboration to enhance quality and opportunity; and, strengthen education ties with workforce and economic development.
For more information, visit: http://www.swfleducation.com

Lee County Port Authority

The Lee County Port Authority operates Southwest Florida International Airport (RSW) and Page Field (FMY) in Fort Myers, Florida. Southwest Florida International Airport served more than 7.5 million passengers in 2011 and is one of the top 50 U.S. airports for passenger traffic. Page Field provides services to corporate, commercial and private aviators and accommodated more than 78,000 aircraft operations in 2011. No ad valorem (property) taxes are used for airport operation or construction and both airports are funded solely with revenue generated from their operations.
For more information, please visit: www.flylcpa.com

Seminole Tribe of Florida

The Seminole Tribe of Florida is a federally recognized Indian tribe organized pursuant to Section 16 of the Indian Reorganization Act of 1934, as amended.

In 1957, the Department of the Interior approved the Tribe's Constitution and Bylaws, and on August 21, 1957, a majority of tribal members voted to establish the Seminole Tribe of Florida. A Tribal Council and Board of Directors were established with elected representation from each reservation community.

Tribal enrollment is about 3,800. Most tribal members live on or near one of the five reservations and tribal land. Headquarters is located on the Hollywood Reservation. The other reservations are Big Cypress, the largest reservation in area; Brighton, located on the northwest side of Lake Okeechobee; Immokalee, located east of Ft. Myers; and the Tampa Reservation. Other tribal members live on the Fort Pierce tribal land.

The ancestors of the Seminoles have lived in the land now known as Florida for countless generations. In the 1800s, the Seminoles fought three wars against the United States in order to stay in their homeland. Some were killed and thousands were captured and shipped to Indian Territory. However, a few hundred courageous men, women and children never gave up, and the Seminoles were never defeated.

To this day, the people are known as The Unconquered Seminoles. For more information visit: http://www.semtribe.com/

Other Local Organizations

Along with the local organizations mentioned above, there are also a number of smaller efforts that are directed to very specific areas. They include the Chambers of Commerce (currently there are 26 in the region), the Development Authorities, the Community Redevelopment Agencies, the Enterprise Zones and the Foreign Trade Zones.

The Florida Eight

regional markets
global customers
great service
economic vitality
for employers

On August 31, 2012, the CEDS Working Committee adopted by a unanimous motion, the 2012 CEDS Plan as the Florida Eight regional strategic plan with a specific emphasis on development of a data system.

Florida 8

The Workforce Florida, Inc., established the Florida Eight initiative to provide regional teams with a variety of facilitation services and resources to build their regional capacity for economic development, talent development, job retention and international business opportunities. The initiative supports the economic development regional model used by Enterprise Florida and the Florida Economic Development Council and recognizes the local and regional differences in a large state such as Florida.

By allowing the eight regions to form Regional Business Teams (RBT) for coordination and partnership, based on their respective industry and talent needs, The Florida Eight provides a great deal of flexibility to ensure the teams can best identify how to advance their economic and workforce priorities and interests.

Southwest:

- RBT Seeks to Build Dynamic Delivery System for Leaders and Economic/Workforce Data
- Requires a Trusted Third Party for Data and Analytics, Solid Allocation of Labor Across the Region Relative to Economic Developers, Workforce Professionals, pre-K – 12 and Higher Education
- Test System with Great Projects:

  Program A – Data Systems and Analytics

  Program B – Regional Extension of Internship Programs

  Program C – Regional Alignment of Demand-driven Task Forces and Advisory councils

  Program D – School districts Center of Excellence for Skills and Academies

  Program E – Change Management and Market Response (including administration of the overall project and milestones)

Project Direction – Repositioning the talent delivery system in the Southwest Florida

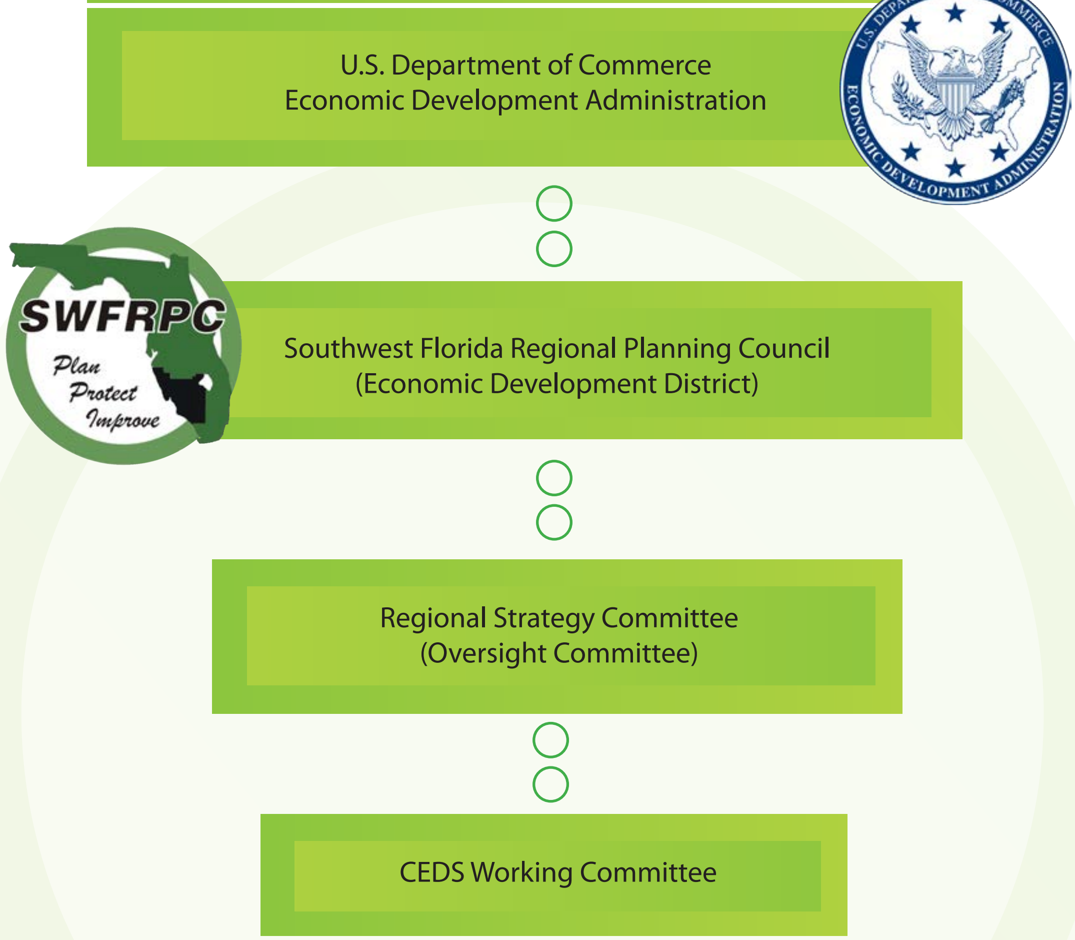
The Florida Department of Transportation's Fort Myers Urban Office (also known as the Southwest Area Office)

The Florida Department of Transportation's Fort Myers Urban Office (also known as the Southwest Area Office)

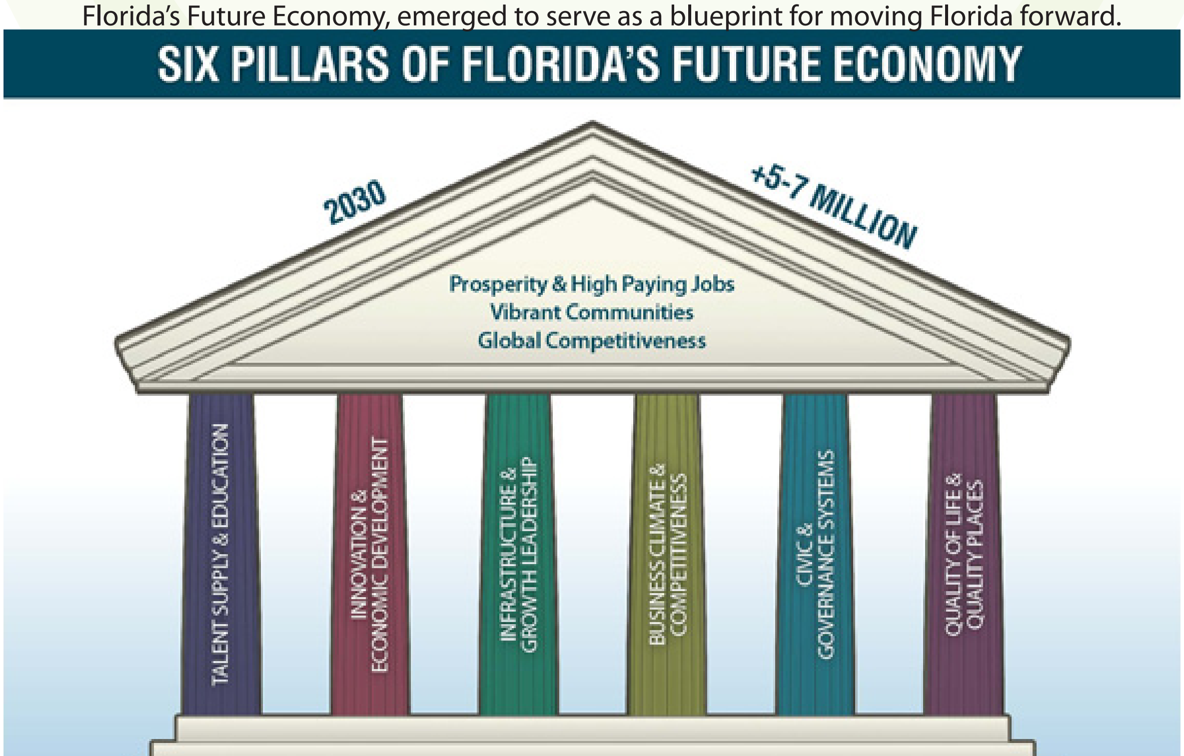
Established by Florida Statute 20.23 in 1986, the Florida Department of Transportation's Fort Myers Urban Office (SWAO) serves as the department's local point of contact for the southern counties of District One. It is responsible for providing policy, direction, local government coordination, and planning for six counties, five of which are part of the Council. In addition to the office's director, who is responsible for annual development of the five year work program for the six counties, staff includes experts in transportation planning, design, right-of-way, traffic operations, access management, and public transportation. Program management staff in SWAO initiates and administers development of joint participation and local funding agreements between the department and local governments throughout the district. Public information staff serves as liaisons with community members and as spokespersons with media. Through its long-standing relationship with local jurisdictions, SWAO sharply focuses a shared vision on multi-modal infrastructure as an economic engine geared to drive Florida competitively through the 21st century. With firsthand understanding about the region's needs, SWAO works closely with local governments and the public to establish transportation priorities, identifies federal and state funding opportunities, and assists in development of projects integral to southwest Florida's – and the state's – mobility and economic well being.

Committee Structure and Six Pillars

Illustration 2: CEDS Committee Structure



Everything we know about Florida has changed, and a new framework, known as the Six Pillars of Florida's Future Economy, emerged to serve as a blueprint for moving Florida forward.



Source: http://www.flchamber.com/six-pillars/overview/

2012 Council Members

The SWFRPC is directed by a thirty-six member Council composed of local elected officials and gubernatorial appointees. Five individuals who represent State interests provide assistance as Ex-Officio members. Of the 24 elected officials who represent local governments, about 40% work full time in their elected posts and 60% work part time in their elected posts.

Karson Turner, Chair
Hendry County

Teresa Heitmann, Vice-Chair
Collier County

Tom Jones Secretary
Sarasota County

Bob Mulhere, Treasurer
Collier County

CHARLOTTE COUNTY
Commissioner Tricia Duffy
Commissioner Chris Constance
Councilwoman Rachel Keesling

COLLIER COUNTY
Commissioner Jim Coletta
Commissioner Donna Fiala
Councilwoman Teresa Heitmann
Mr. Robert "Bob" Mulhere
Mr. Alan D. Reynolds

GLADES COUNTY
Commissioner Kenneth S. Jones
Commissioner Robert Giesler
Councilwoman Pat Lucas
Mr. Thomas C. Perry

HENDRY COUNTY
Commissioner Karson Turner
Commissioner Al Perry
Commissioner Joseph Miller
Commissioner Daniel Akin
Mr. Mel Karau

LEE COUNTY
Commissioner Frank Mann
Commissioner Ray Judah
Councilman Chris Chulakes-Leetz
Councilman Mick Denham
Councilman Forrest Banks
Councilman Joe Kosinski
Councilwoman Martha Simons
Ms. Laura Holquist
Mr. Paul Pass

SARASOTA COUNTY
Commissioner Carolyn Mason
Commissioner Christine Robinson
Commissioner Tom Jones
Councilman Kit McKeon
Commissioner Willie Shaw
Mr. Felipe Colón

EX-OFFICIO MEMBERS
Phil Flood, SFWMD
Jon Iglehart, FDEP
Maya Burke, SWFWMD
Johnny Limbaugh, FDOT

Regional Strategy Oversight Committee Members

Laura Holquist
Lee County

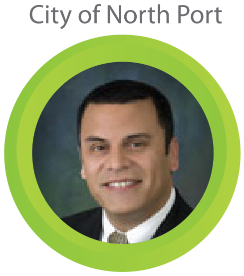
Tom Jones
City of North Port

Forrest Banks
City of Fort Myers

Alan Reynolds
Collier County

Tricia Duffy
Charlotte County

Mick Denham
City of Sanibel



Chris Constance
Charlotte County

Tom Perry
Glades County

Bob Mulhere
Collier County

Teresa Heitmann
City of Naples

NON-COUNCIL MEMBERS: Maya Burke, SWFWMD; Pete Quasius, Citizen Appointee; Ron Hamel, Gulf Citrus Growers

CEDS Working Committee

The CEDS Working Committee met frequently during the development process of the 2012 CEDS and will continue to meet quarterly to monitor the progress of on-going projects identified in the plan. The CEDS Working Committee meets to discuss the region's economic situation, to evaluate and endorse appropriate economic development projects, to advise participating municipalities and organizations of funding opportunities and programs, and to bring matters of regional importance to the attention of the Council government officials.

COMMITTEE STRUCTURE

In compliance with United States Department of Commerce, Economic Development Administration guidelines, the CEDS Working Committee is responsible for developing, revising or replacing the CEDS. The Committee is comprised of representatives from the main economic interests in the region, including the private sector. See Table 6 below for a list of members.

Table 6: 2012 CEDS Working Committee

Committee Member		Alternate		Six Pillars	Public Sector	Private Sector
Gregory	Adkins	Denise Carlin	Lee County Public Schools	Talent Supply & Education	✓	
Robert	Ball	Josh Philpott	SW Florida International Airport	Infrastructure & Growth Leadership	✓	✓
Dana	Brunett	Audie Lewis	City of Cape Coral EDO	Innovation & Economic Development	✓	✓
Marvin	Collins		City of Fort Myers	Civic & Governance Systems	✓	
Laura	DeJohn		Johnson Engineering, Inc	Business Climate & Competitiveness		✓
Brooke	Gabrielsen		SWFL Regional Technology Partnership	Infrastructure & Growth Leadership		✓
Gregg	Gillman		Hendry County EDC	Innovation & Economic Development	✓	✓
Doug	Gyure		S4J Manufacturing Services, Inc.	Business Climate & Competitiveness		✓
Cotrenia	Hood		The Greater Naples Chamber	Innovation & Economic Development	✓	✓
Mark	Huey	Joan McGill	Economic Development Corp of Sarasota County	Innovation & Economic Development	✓	✓
Gary	Jackson		FGCU - Mod II-13	Talent Supply & Education	✓	
Allan	Lane	Ruth Buchanan	City of North Port	Innovation & Economic Development	✓	✓
Frank	Mambuca		U.S. Metropolitan Telecom	Business Climate & Competitiveness		✓
Jim	Moore	Warren Baucom	Lee County EDO	Innovation & Economic Development	✓	✓
Thomas	Patton	Debrah Forester	Charlotte County EDO	Economic Development	✓	✓
Dan	Regelski	Suzanne Specht	FGCU Sm. Bus. Dev. Center	Talent Supply & Education	✓	
Gina	Reynolds		FHREDI	Innovation & Economic Development	✓	✓
Pat	Riley		Alliance of Educational Leaders	Talent Supply & Education	✓	✓
Brian	Rist		The Smart Companies, Inc.	Business Climate & Competitiveness		✓
Christine	Ross		Bonita Springs Chamber	Innovation & Economic Development	✓	✓
Beth	Sterchi		Collier Bus. & Economic Development	Innovation & Economic Development	✓	✓
Jim	Wall	Curt Bradbury	Southwest Florida Workforce Development Board	Talent Supply & Education	✓	
Tracy	Whirls		Glades County EDC	Innovation & Economic Development	✓	✓

Revised: September 6, 2012

CEDS Interested Individuals

The Council CEDS Interested Individuals list represents additional community involvement that supports the efforts required by the EDA. This committee provides input to the CEDS Working Committee. See Table 7 below for a list of individuals.

Table 7: CEDS Interested Individuals

Committee Member		Company
Rock	Aboujaoude	Rock Enterprises, Inc.
Missie	Barletto	AIM Engineering & Surveying, Inc.
Fran	Belasco	Lee County Visitor's Bureau
Marie	Capita	Immokalee Business Development Center
Maureen	Christensen	The Greater Naples Chamber of Commerce
Theresa	Cook	Florida Tradeport
Dottie	Cook	Empowerment Alliance of SW FLA
Tom	Danahy	Kitson Babcock, LLC
Matthew	DePalma	Florida Shores Bank
Colleen	DePasquale	Greater Fort Myers Chamber of Commerce, Inc.
Stephen	Drew	Florida Gulf Coast University
John	Dunkleman	IFAS, SW Fla. Research & Educ. Center
Margaret	Emblidge	Margaret Emblidge & Associates LLC
Julio	Estremera	The Career & Service Center of Collier County
Marlene	Foord, AICP	Collier County Government Center
Tom	Gallaher	Seminole Tribe
Lou	Galterio	C Vision, Inc.
Kathi	Gray	Collier County GOP
Janice	Groves	SBDC
Bert	Hamilton	Harvey Software, Inc.
Teri	Hansen	Gulf Coast Community Foundation
Catherine	Haworth	Florida SBDC at FGCU - Lutgert College of Business
Laura	Holquist	SWFL Regional Planning Council
John	Huysman, Ed.D.	Glades County School District Moore Haven Jr./Sr. High School
Nicole	Johnson	Conservancy of Southwest Florida
J. Michael	Jordan	Florida Community Bank
Maureen	Jordan	Seacoast National Bank
Peter	Kararstamatis	Hodges University
Stephanie	Kissinger	Bonita Springs Chamber of Commerce
Gary	Knipe	Keepsake Plants
Tom	Matrullo	Private Sector
Paul	McGehee	Glades Electric Cooperative, Inc.
Anne	Merrill	Collaborative Community Design, LLC
Dalton	Moraes	Atos Origin, Inc
Vicki	Moreland	Southwest Florida Int'l Airport
Robert	Mulhere	Mulhere & Associates, LLC
Tammie	Nemecek	Florida Economic Gardening Institute
Sue	Noe	Lee County Economic Development Office
Penny	Phillipe	Immokalee Business Development Center
Robbie	Powell	Wright Construction Group
Gary	Quill	Punta Gorda Airport
Bianca	Ross	Private Sector
Pamella	Seay	Charlotte County Airport Authority
Ken	Sneeden	Ken Sneeden and Associates LLC
Tonda	Soisson-Lawson	Brown & Brown Insurance
Robin	Stublen	Office of Governor Rick Scott
Kevin	Taylor	John Madden Company
Julianne	Thomas	Conservancy of Southwest Florida
Sue	Trone, AICP	Bayshore Gateway Triangle CRA
Bill	Truex	Truex Preferred Construction
Russ	Weyer	Fishkind & Associates, Inc.
Glorida	Wilson	Seminole Tribe
Ron	Zimmerly	City of Labelle

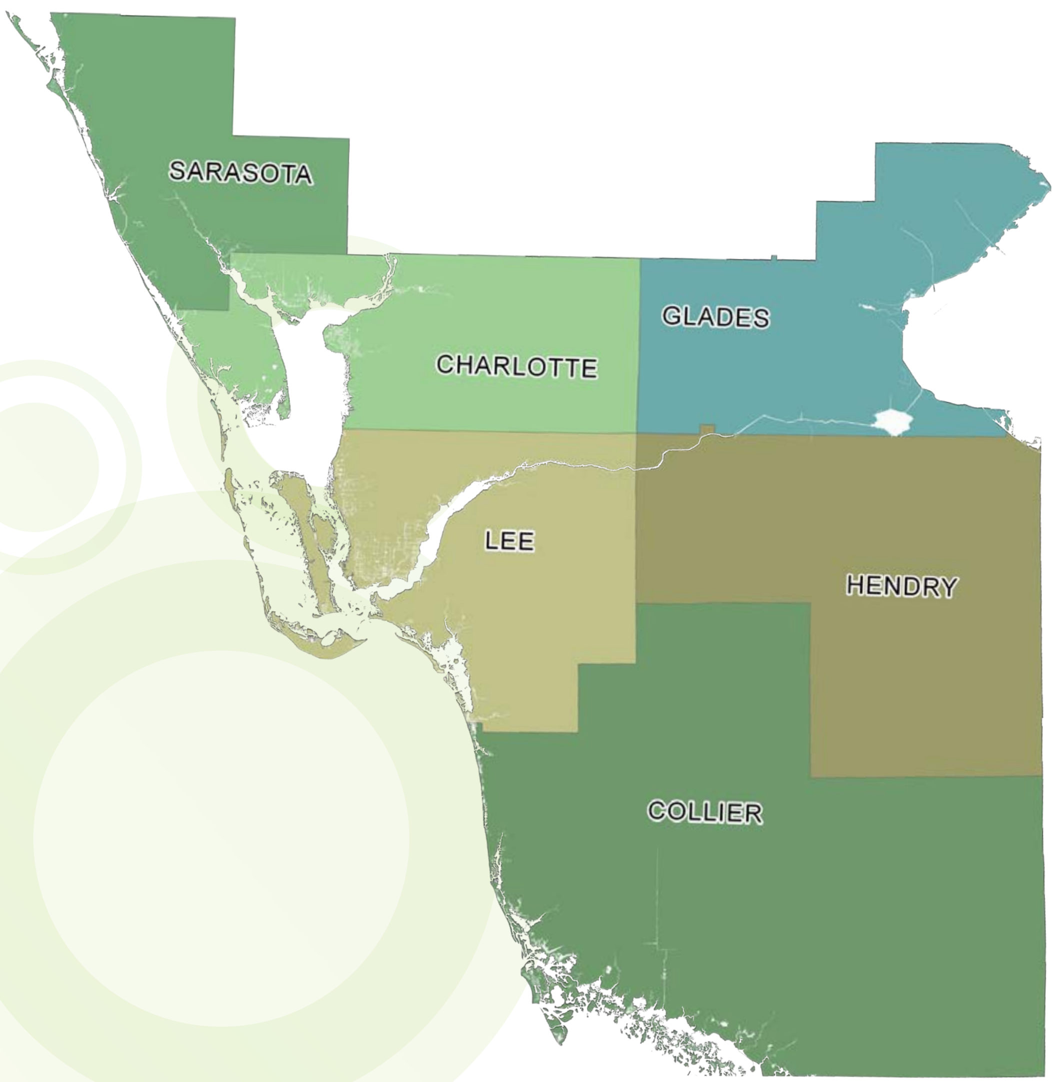
Revised: September 4, 2012

PLANNING ORGANIZATION HISTORY AND MANAGEMENT

The SWFRPC was created by an Interlocal Agreement dated November 8, 1973, amended October 28, 1980, between Charlotte, Collier, Glades, Hendry, Lee and Sarasota Counties, and by Chapter 186.505, Florida Statutes. In accordance with Florida Statutes, the agency is directed by a Council (currently 36 members) composed of 25 county commissioners and municipal elected officials, 7 gubernatorial appointees from all counties within the region including an elected school board member, and five ex-officio (non-voting) gubernatorial appointees representing the Florida Department of Transportation, the Florida Department of Environmental Protection, statewide economic development interests, and water management districts.

The Council is designated Regional District 9 and serves as a regional information clearinghouse. The Council works within the six-county region to develop and maintain area-wide goals, strategies, and actions, and assists in implementing a variety of local, state and federal programs. The Council serves as an advocate for the region with State and Federal agencies, including the Legislature and Congress. In addition, the Council works with its members and partners to develop and maintain region-wide goals, objectives and policies and assists in implementing local , state and federal programs.

In 2012, the Council identified economic development as a top priority, along with grant work, data/demographics, regional planning and emergency management programs. The Council established a Strategy Committee specifically to work on economic development issues and to provide oversight to the CEDS Working Committee, charged with producing a CEDS.



ECONOMY

The economy in Southwest Florida is continuing to recover from the collapse of the housing bubble and the financial crisis that has impacted the national and global economies. Population growth has traditionally driven economic growth in Southwest Florida which is a favorite destination for retirees as full-time or seasonal residents.

The area's competitive advantage has been its beaches, natureal resources, recreational opportunities, and mild winter weather making tourism an important industry that provides employment and jobs to a large percentage of the workforce. In addition, construction is anticipated as an important part of the overall Southwest Florida economy in order to provide job growth for the region (see Illustration 3).

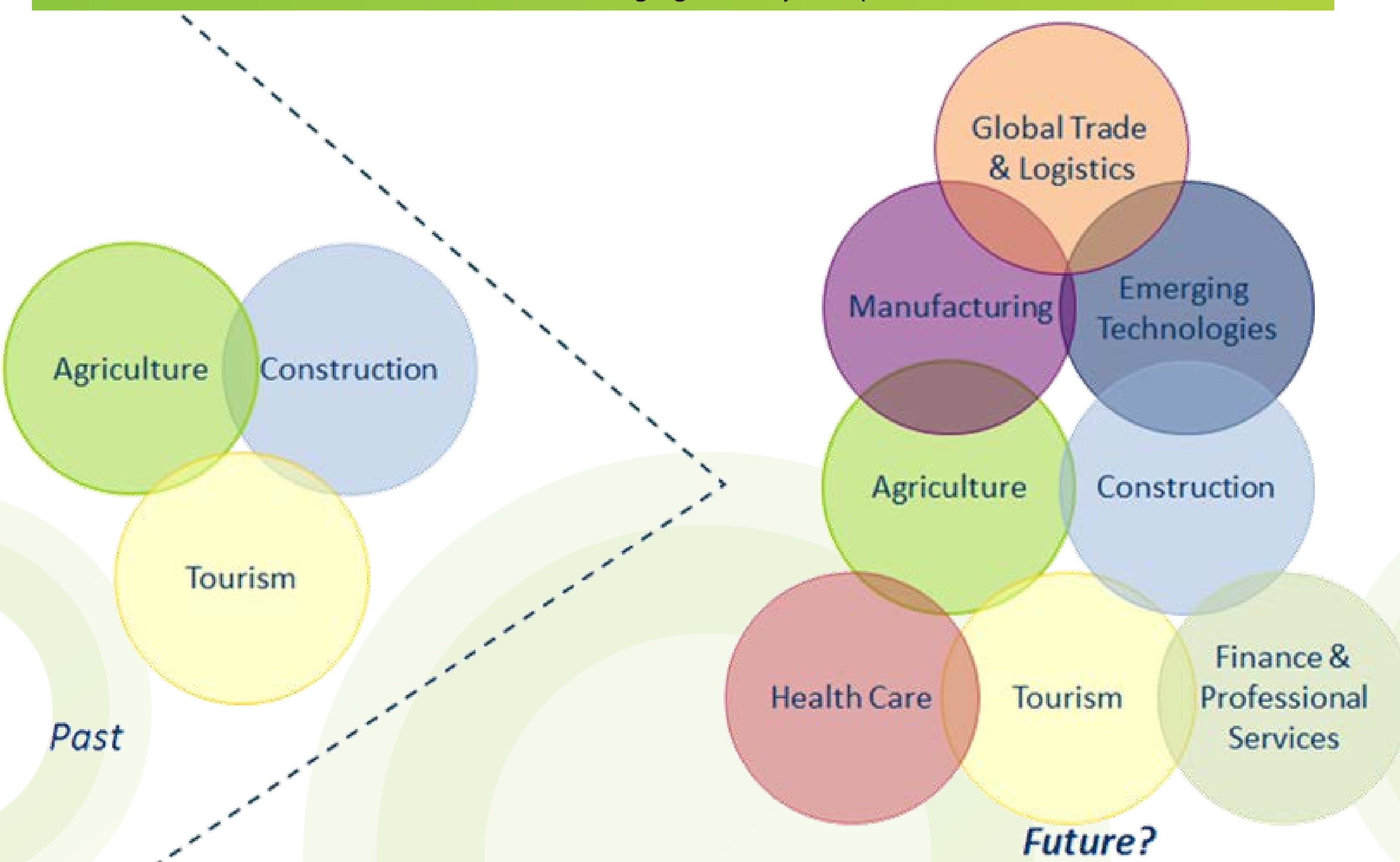
Additionally, agriculture continues to be an important component of the overall regional economy. For these reasons, the regional economy is very seasonal creating more employment in the busier winter season.

Southwest Florida has a variety of different cultures, habitats and identities. The western coastal communities and interior agricultural lands are patchwork of vibrant coastal cities; suburban communities, and rural farm towns linked together by a central urban corridor.

Some of key challenges facing the regional community include the need to improve the infrastructure necessary for adequate educational systems, transportation networks and communication systems. The regional economy has high levels of unemployment that is structurally (long-term) a problem that require the unemployed to acquire new skills and training to be competitive in this dynamic regional economy.

Research and innovation is expected to be key drivers in transforming the regional economy to be less dependent on the traditional employers and provide a more diversified overall economy.

Illustration 3: Changing Industry Composition



Source: DEO Forum Presentation

HEALTH CARE

From medical equipment and medical supplies manufacturing to the expanding heathcare industry, Southwest Florida is alive with opportunity for companies pioneering new innovations in this ever-growing industry.

Based in part on the large population of retirees in Southwest Florida, medical services have been – and will continue to be – an ever-present need, creating opportunities for economic development and higher wage employment throughout the six-county region.

Advanced research facilities, new and expanding hospital systems, and specialized training programs ensure that Southwest Florida will remain on the leading edge of healthcare's technological evolution.

Southwest Florida has some of the finest hospitals, physicians and healthcare facilities in the country including The Children's Hospital of Southwest Florida ,the only comprehensive child healthcare facility between Tampa and Miami that provides vital healthcare for the region's children, from infancy through age 18. Provided below are the region's major healthcare facilities:

Charlotte County
Charlotte Regional Medical Center
Fawcett Memorial Hospital
Peace River Regional Medical Center/Hospital
Peace River North Port Health Park

Collier County
Physician's Regional Medical Center
Naples Community Hospital
North Collier Hospital - NCH Healthcare System

Glades/Hendry Counties
Hendry Regional Medical Center

Lee County
Cape Coral Hospital
Lee Memorial Health System
Lee Memorial Hospital
Children's Hospital of Southwest Florida
Gulf Coast Hospital
Gulf Coast Medical Center
Health Park Medical Center
Lehigh Regional Hospital

Sarasota County
Englewood Community Hospital
Florida Hospital
Highlands Regional Medical Ctr
Sarasota Memorial

FINANCIAL RESOURCES

The availability of financial resources to fund business ventures in the six counties makes Southwest Florida an impressive pro-business environment. A number of financial resources are available for the establishment or expansion of business ventures in the area, including:

- Angel Funds
- Bank Financing
- Bond Financing
- Business Incubators/Consortiums
- Finance Companies
- Grants
- Import/Export Financing
- Investment Banks
- Leasing
- Public Offerings
- Small Business Loans
- Venture Capital

Florida is home to nearly 123,000 Financial and Professional Services establishments that employ nearly a million people. Southwest Florida has become one of the state's major players, especially when it comes to the global financial market.

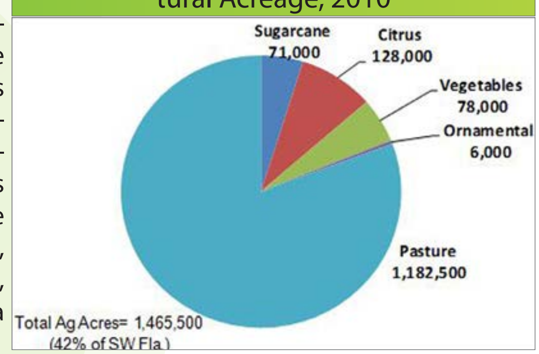
The global competitiveness of Florida's essential value-added service providers is reflected in the fact that Florida's service exports to other countries are valued at over $30 billion a year. Because of our prime location in the state, businesses in Southwest Florida's six counties are perfectly positioned to take advantage of the growing global marketplace.

As we enter a new era of intra-regional cooperation, Southwest Florida offers exciting growth opportunities for financial services businesses, as well as the chance to collaborate with other business sectors to help create a more dynamic regional economy.

AGRICULTURE

Southwest Florida's farmers, growers and ranchers are among the state's most progressive producers and represent a major economic sector to the region's and state's economy. Southwest Florida agriculture includes producing acreage in Charlotte, Collier, Glades, Hendry, Lee and Sarasota

Illustration 4: Southwest Florida Agricultural Acreage, 2010



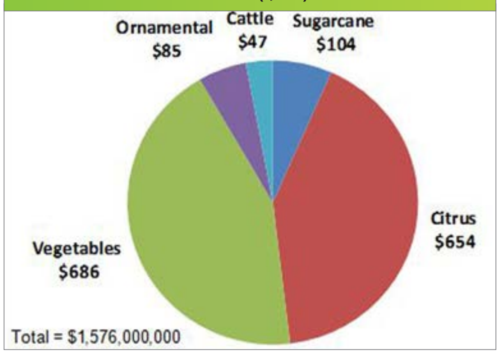
counties (see Illustration 4).

Economic Impacts

Southwest Florida agriculture has an economic impact totaling over $1 billion annually from "direct" farm sales. When adding "indirect" and "induced" sales to those "direct" farm sales, our region's agriculture has a total economic impact of nearly $2 billion.

The major agricultural commodities produced in Southwest Florida include citrus, cattle, sugarcane, vegetables and ornamentals. Citrus is produced on over 140,000 acres, and generates nearly $600-million of "farm-gate" sales. Cattle graze on over one-million acres of pasture land and produce "farm-gate" sales totaling $45-million.

Illustration 5: Farm-Gate Sales, 2010 ($M)



Sugarcane is grown on 85,000 acres, and generates about $104 DO-million in "farm-gate" sales (see Illustration 5). Vegetable production is highly concentrated on 75,000 acres, and accounts for nearly 686-million in "farm-gate" sales. And, the region's ornamental production on 7,600 acres contributes $85-million in "farm-gate" sales.

Critical Part of Florida Agriculture

Florida Agriculture Commissioner Adam Putnam recently reported that Florida agriculture generates about $100 billion of economic impact and employs nearly one million people. In addition to its production of food and fiber, Commissioner Putnam cites agriculture's values in water conservation and aquifer recharge, habitat protection and other natural resources conservation. He describes this centuries-old industry as a "critical pillar" of Florida's economy. Southwest Florida has been and is projected to remain one of the state's most critical agriculture production regions.

EDUCATION

Southwest Florida's economy depends on preparing today's students for jobs that haven't even been invented. To that end, top university and public schools leaders have committed themselves as a unified group to improve students' academic performance and career preparation. This is a powerful start to aligning the region in order to be a player in the global workforce, today and into the future.

The Alliance of Educational Leaders intend to create a seamless web of educational opportunities; model regional educational cooperation to enhance quality and opportunity and to contribute to higher graduation rates and increased levels of job placements within SW Florida; and strengthen ties with economic and workforce development in traditional and non-traditional ways to increase regional sustainable economic prosperity.

The Alliance members met between October 2011 and February 2012 to identify the most important goals to position Southwest Florida education for 21st Century success. Framed against the Florida Chambers Six Pillars (specifically, Pillar 1: Education and Talent), the 2015 Plan entitled One Region- One Goal Plan: Preparing the 21st Century identified four goals, each with strategies, actions, timelines and measurements:

Goal 1: Improve Regional Academic Performance

Goal 2: Increase STEM Focus

Goal 3: Strengthen Education and Business Connection

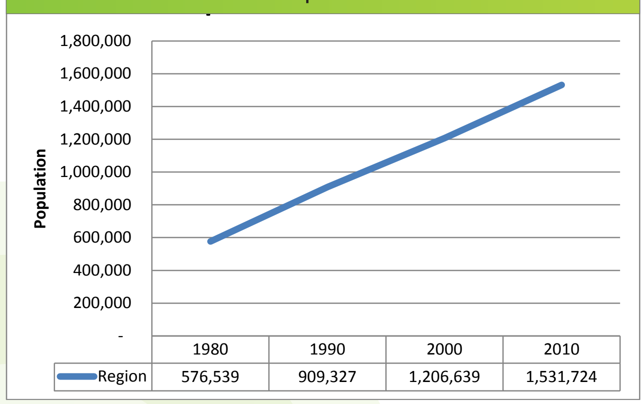
Goal 4: Strengthen Dialogue with Legislators

SOUTHWEST FLORIDA DEMOGRAPHICS

Population

Like much of Florida, the Southwest Florida Region has experienced considerable population growth in the last few decades. Between 1980 and 2010, the region's population grew by 166 percent (see Illustration 6). During the same time frame, Florida's population grew by 93 percent, while total United States population grew by only 36 percent.

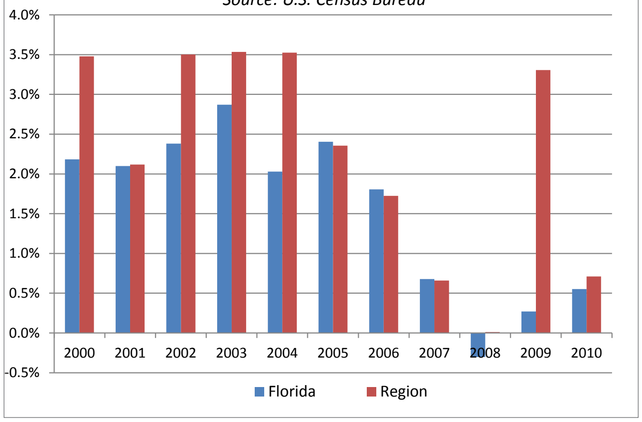
Illustration 6: Population 1980-2010



While population growth was negative in Florida in 2008, the population increase resumed in 2009 (see Illustration 7).

Illustration 7: Population Growth Rates, 2000-2010

Source: U.S. Census Bureau

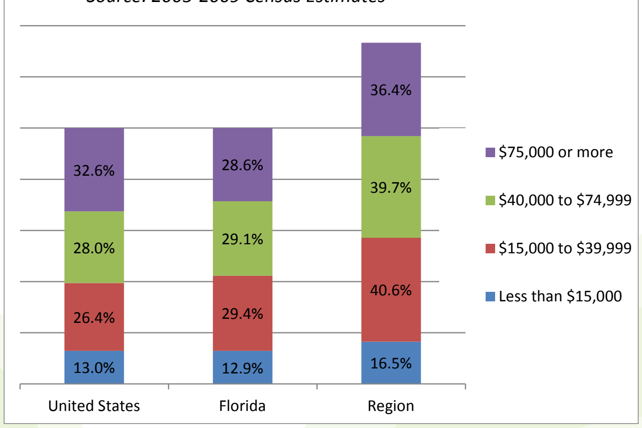


Income & Poverty

The median household income in the Southwest Region was $46,460 according to 2009 five-year Census estimates. 16.5 percent of households have annual incomes below $15,000, while 36.4 percent have incomes of $75,000 or more (see Illustration 8). 14.1 percent of the population lives in poverty. (The poverty threshold, defined by the Census Bureau, varies depending on household size and other factors. In 2010, the threshold for a family of four, with two children, was $22,113.)

Illustration 8: Household Income

Source: 2005-2009 Census Estimates

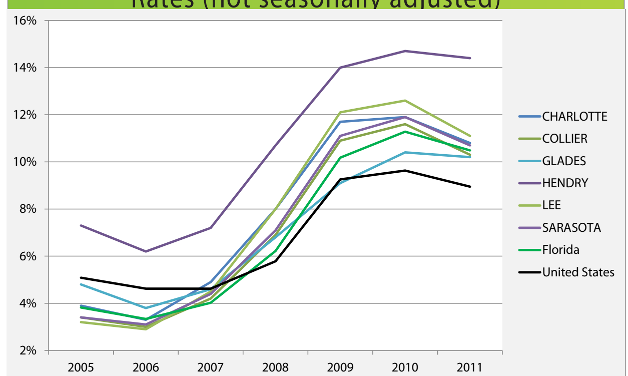


Unemployment

In the past five years, annual average unemployment rates in the region were lowest in 2006 (3.1 percent) before rising each year from 2007 to 2010. Figures for 2011 indicate a recovery (see Table 8). Hendry and Lee Counties have had the highest unemployment rates in recent years, and Glades County the lowest (see Illustration 9)

Table 8: Average Annual Unemployment Rate	
2005	3.5%
2006	3.1%
2007	4.5%
2008	7.6%
2009	11.6%
2010	12.2%
2011	10.9%

Illustration 9: Average Annual Unemployment Rates (not seasonally adjusted)

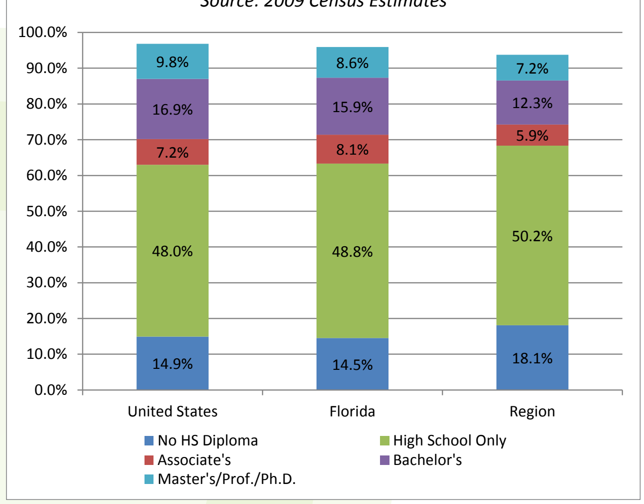


Educational Attainment

According to 2009 Census estimates, 18.1 percent of adults aged 25 or older in our region do not have a high school diploma or equivalent, while 12.3 percent hold a degree at the bachelor's level or higher. Compared to the state and the nation, the Southwest Region has a lower percentage of residents with post-secondary degrees and a higher percentage who have a high school diploma (see Illustration 10).

Illustration 10: Educational Attainment
Population 25 Years and Over

Source: 2009 Census Estimates



GEOGRAPHY

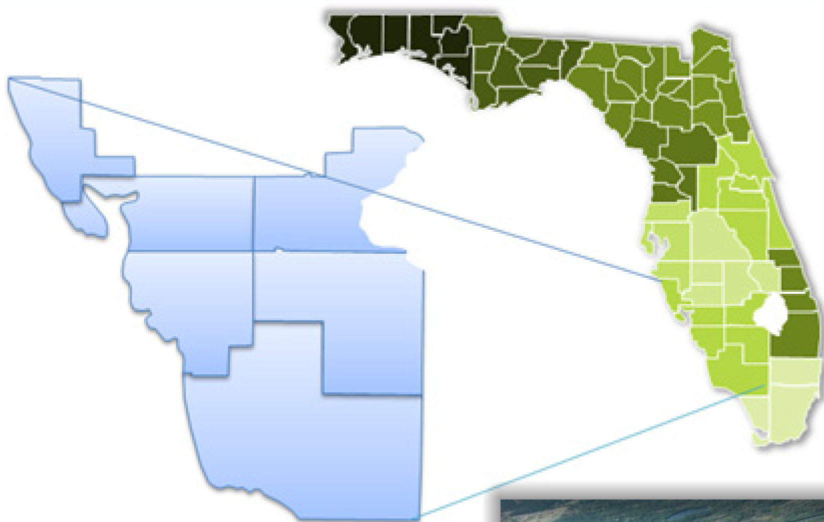
Southwest Florida is a diverse region located along the Gulf of Mexico. The region links together Florida's central urban corridor. The western coastal communities, southern metropolitan areas, and interior agricultural lands form patchwork of vibrant coastal cities; suburban communities along I-75, and rural farm towns.

There are six counties comprising the region: Charlotte, Collier, Glades, Hendry, Lee and Sarasota (see Illustration 11). The total area (land and water) of the region is 6,663 square miles and a land area of 5,986 square miles. Four of the counties border the Gulf of Mexico, with a total shoreline of 4,515 miles, and comprise a large portion of the region's urban area. Two counties are bounded by Lake Okeechobee, with a total of 135 miles of shoreline, the second largest freshwater lake in the United States.

Southwest Florida has developed with a sustainable economic foundation of agriculture, construction and tourism. This "three legged stool" was successful for much of the 20th century. However, since the turn of the century, the people and businesses of our region are reeling from the consequences of suburban sprawl, housing market volatility, economic downturn, along with climate change and storm hazard vulnerability. The imbalance between coastal communities where cultural and capital resources are concentrated and rural communities where agriculture and environmental resources are concentrated is growing, and pressure for conventional sprawl threatens rural communities and the region.

Illustration 11: Southwest Florida Region

Charlotte, Collier, Glades, Hendry, Lee & Sarasota



INFRASTRUCTURE

The lifestyle enjoyed by a community and its ability to attract and sustain economic development is predicated on the quality of its public facilities and infrastructure. Indeed, as regions across the country and world are interconnected in a globally competitive economy it is critical for the Southwest Florida Region to develop, expand and maintain multi-modal transportation systems and telecommunication infrastructure to support a prosperous and globally competitive economy.

The World Economic Forum in its *Global Competitiveness Report 2011-2012* makes the distinct point: "Extensive and efficient infrastructure is critical for ensuring the effective functioning of the economy, as it is an important factor determining the location of economic activity and the kinds of activities or sectors that can develop in a particular instance…the quality and extensiveness of infrastructure networks significantly impact economic growth and reduce income inequalities and poverty in a variety of ways. A well-developed transport and communications infrastructure network is a prerequisite for the access of less-developed communities to core economic activities and services…"

The *Global Competitiveness Report 2011-2012* stresses the importance of transportation networks. "Effective modes of transport, including quality roads, railroads, ports and air transport, enable entrepreneurs to get their goods and services to market in a secure and timely manner and facilitate the movement of workers to the most suitable jobs: a solid and extensive telecommunications network allows for a rapid and free flow of information, which increases overall economic efficiency by helping to ensure that business can communicate and decisions are made by economic actors taking into account all available relevant information."

In its report, *Growth and Renewal in the United States: Retooling America's Economic Engine*, McKinsey Global Institute notes that building 21st-century infrastructure is a key imperative to advance sustainable GDP growth in the US.

Two critical trends are highlighted in the report that suggest a more active approach to infrastructure development and finance is needed both for the country as a whole but to regions like Southwest Florida specifically. The first trend is that the relative quality of US infrastructure has been declining over the past decade. According to the World Economic Forum's *Global Competitiveness Report 2010-2011*, the United States ranked 23rd out of 139 countries on the overall quality of infrastructure. The American Society of Civil Engineers suggests a total of $2.2 trillion is needed to upgrade the quality of existing infrastructure assets and build new infrastructure.

The second trend relates to the relatively low rate of broadband penetration in the country. With 27 subscribers out of 100, the United States falls behind many countries, effectively placing limits on economic activity. McKinsey Global Institute suggests that the nearly 40 percent of United States households that do not subscribe to broadband represent $450 billion in annual purchasing power of retail products.

Coming out of one of the deepest national recessions, the region's leadership both public and private will need to come together to focus on making strategic investment decisions to fund existing and future infrastructure systems holistically. This will require coordinated economic development, land use, infrastructure, water and natural-resources decision-making.

WATER

The Southwest Florida Region has abundant water resources. The bays, inlets, estuaries, rivers, lakes and streams in the region provide a valuable contribution to the area's economy. These waters are essential to tourism, recreation, commercial fishing, and the aesthetic characteristics of the region.

FREIGHT, LOGISTICS AND PASSENGER OPERATIONS

The Florida Department of Transportation's Office of Freight, Logistics and Passenger Operations (FLP) is focused on implementing the goals of Florida House Bill 599, which was approved on April 27, 2012, through development of the Freight Mobility and Trade Plan by the summer of 2013. The plan is intended to encompass the state's freight mobility and connectivity needs including those of Southwest Florida. The goals of the plan are:

- Increasing the flow of domestic and international trade through the state's seaports and airports, including specific policies and investments that will recapture cargo currently shipped through seaports and airports located outside the state
- Increasing the development of intermodal logistic centers in the state, including specific strategies, policies, and investments that capitalize on the state's empty backhaul trucking and rail market
- Increasing the development of manufacturing industries in the state, including specific policies and investments in transportation facilities that will promote the successful development and expansion of manufacturing facilities

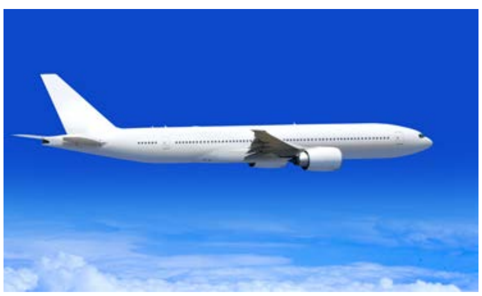
- Increasing the implementation of compressed natural gas (CNG), liquefied natural gas (LNG), and propane energy policies that reduce transportation costs for businesses and residents located in the state.

The FLP also plans to implement other key initiatives including:

- Development of a Statewide Seaport and Waterways System Plan
- Continued partnership with the Florida Chamber of Commerce on Phase 2 of their Trade and Logistics Study
- Future updates to the Rail System Plan
- Creation of a Statewide Motor Carrier Plan
- Future updates to the Florida Aviation System Plan
- Future updates to the Air Cargo Study

Airports

The majority of the Southwest Florida's scheduled airline passenger and shipping service are provided by regional facilities such as the Southwest Florida International Airport and the Sarasota/Bradenton International Airport. Other smaller facilities such as the Naples Airport and Charlotte County Airport also support limited commercial passenger service. There are a number of additional airports that accommodate charter and general aviation traffic and include: Page Field in Lee County; Buchan Field and Venice Airport in Sarasota County; the Labelle Airport and Airglades Airport in Hendry County; and the Marco Island, Everglades City, and Immokalee Regional Airports in Collier County.



Southwest Florida International Airport (RSW) is a commercial service airport located in Fort Myers. The airport served more that 7.5 million passengers in 2011 and is one of the top 50 U.S. airports in passenger traffic. In addition to passengers, the airport serves as an important cargo facility for Southwest Florida. In 2011 more than 32 million pounds of freight moved through RSW. Page Field General Aviation Airport (FMY) serves as a reliever faciltiy to RSW. The airport accommodates a significant amount of corporate and business-related traffic, as well as recreational and flight training activity.

Southwest Florida International Airport is an important contributor to the region's social and economic well being. The Florida Department of Transportation (FDOT) conducted a Statewide Aviation Economic Impact Study which began in December 2008 and was completed in March 2010. The study showed that Southwest Florida International Airport (RSW) contributed nearly $3.8 billion to the local economy from airport and related-airport activities and accounted for 41,588 jobs. The study also examined the economic impacts of Page Field (FMY), the general aviation and reliever airport operated by the Lee County Port Authority. The FDOT study showed Page Field's contribution was $94.6 million in 2009 and that the airport is responsible for more than 987 jobs.

Naples Municipal Airport is home to flight schools, air charter operators and corporate aviation and nonaviation businesses as well as fire/rescue services, mosquito control, car rental agencies and the Collier County Sheriff's Aviation Unit. All funds used for the airport's operation, maintenance and improvements are generated from activities at the airport or from federal and state grants; the airport receives no property tax dollars. During the 2010-2011 fiscal year, the airport accommodated more than 84,000 takeoffs and landing. FDOT values the airport's economic impact to the community at more than $273 million annually.

Rail Service

Seminole Gulf Railroad continues to operate freight service to Southwest Florida via one short-rail line using connections with the CSX line in Arcadia. There is no intermodal terminal in Southwest Florida where containers and trailers on flatcars can be loaded and unloaded. Since Southwest Florida has no water based port facilities, the lack of intermodal access means that there are few alternatives to the highway system for most types of shipment goods into and out of the region.

Trucks & Frieght

Trucking and the movement of goods and freight play critically important roles in the regional, state, and global economy. Measured by its value, nearly 78% of freight in Florida is carried exclusively by truck. Trucks are the dominant mode of transportation for businesses shipping goods into and out of the Southwest Florida region. Overall, trucks accounted for about 88% of total shipments, on average, according to the companies responding to a recent Florida Chamber freight survey.

Enterprise Florida addresses logistics and distribution as big business in Florida, where the broader wholesale trade, transportation and logistics industry employs more than half a million Floridians. Of those, some 84,000 residents work at companies specifically providing logistics & distribution services. Nearly every major global logistics integrator already has a presence in the state, including the headquarters for Ryder System, Inc., Landstar System Inc., CEVA Logistics U.S., Inc. and other top logistics companies. As the Western Hemisphere's commercial gateway, Florida's logistics & distribution industry is poised to grow further with the completion of the Panama Canal expansion in 2014 and the numerous infrastructure developments and upgrades underway around the state. *http://www.eflorida.com*

The Florida Chamber Foundation's Florida Trade and Logistics Study indicates several trends will position Florida for a larger, more commanding role as a trade hub in the next decade.

Florida currently has more than 55,000 companies exporting goods and services in the global marketplace and the Florida Chamber is leading the effort to expand Florida's trade and export opportunities. We are committed to substantially increasing the number of both domestic and international exports as we work toward making Florida a global hub for trade and investment.

In order to meet the goal of doubling Florida-origin exports over the next five years, we must focus the attention of state policy makers on the importance of international trade. *http://www.flchamber.com/issue/international-trade-domestic-exports-ports/.*

ECO-TOURISM

Florida contains a diversity of natural and cultural wonders. Although national and state parks and forests abound throughout the state, many of Florida's private landowners also have the potential to show off some of Florida's unique natural and cultural attractions. Nature-based tourism is a comparatively new industry in Florida, and it is rich with potential benefits for Florida's landowners and business operators. Relatively few businesses have taken advantage of nature as a tourism opportunity and opened their lands to visitors. However, the businesses that have, offer valuable lessons for other businesses potentially interested by sharing their resources with visitors.

Seminole Tribe of Florida Reservations

http://www.semtribe.com

Big Water Heritage Trail

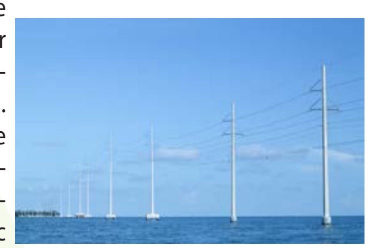
The Big Water Heritage Trail is a driving heritage trail that identifies, links, and marks sites of historical, cultural, natural, recreational and educational importance to the area. The Big Water Heritage Trail encompasses five counties surrounding Lake Okeechobee in Florida. The trail's name is derived from the Seminole word for Okeechobee, which means "Big Water". To view the brochure, please visit: *www.swfrpc.org*

ENERGY

Electrical Power

Currently within the Southwest Florida Region, there are five companies that supply electric service to the area. These companies are:

1. Glades Electric Cooperative;
2. Lee County Electric Cooperative;
3. Florida Power and Light Company;
4. Peace River Electric Cooperative; and
5. Clewiston Electric Utilities.



The cooperatives purchase power from the Florida Power and Light Company and Seminole Electric Cooperative. Glades Electric Cooperative provides power to the majority of Glades and Hendry Counties. The Peace River Electric Cooperative provides power to a small section of rural Sarasota County. In addition, the Clewiston Electric Company provides electricity to its incorporated area in Hendry County. Lee County Electric Cooperative purchases its power from the Seminole Electric Cooperative, a generation and transmission utility located in Palatka, Florida.

B. CEDS Goals and Objectives - Building the Pillars

1. TALENT SUPPLY & EDUCATION

Goal 1.1: Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.

Objective 1.1.1: Adequate funding shall be available to provide education and training.

Objective 1.1.2: Build a sufficiently skilled workforce to meet future employment demands.

Objective 1.1.3: Become a national leader in providing financial resources to support workforce training and skill development programs.

Goal 1.2: Ensure educational systems and workforce training that support innovation and creativity.

Objective 1.2.1: Review policies and rules to identify barriers to innovation and creativity in schools.

Objective 1.2.2: Support the growth and expansion of universities and institutions of higher learning.

2. INNOVATION & ECONOMIC DEVELOPMENT

Goal 2.1: Provide funding for ongoing economic development activities.

Objective 2.1.1: Establish funding mechanisms for ongoing economic development activities.

Goal 2.2: Provide technical assistance and use new technology to promote job growth.

Objective 2.2.1: Identify technical assistance programs that are available on a regional scale and facilitate the delivery of technical assistance to the region's workforce through technology.

Goal 2.3: Build seamless information technology infrastructure.

Objective 2.3.1: Identify opportunities for public/private coordination of information, and establish protocol for integrating information technology infrastructure for the region.

Goal 2.4: Encourage alternative energy production and green product industries.

Objective 2.4.1: Establish a work group including representatives from all the alternative energy initiatives of local jurisdictions in the region to incorporate one regional effort.

Objective 2.4.2: Quantify the renewable energy resources existing in the region and determine feasibility of developing the region's energy production further, including the potential for exporting power produced by renewable energy in the region to the state's coastal grids.

Goal 2.5: Brand the region as a hub to attract and retain entrepreneurs.

Objective 2.5.1: Complete an asset map of the region identifying incubators; entrepreneurial support services; venture capital organizations; and urban centers that provide live/work opportunities.

3. INFRASTRUCTURE & GROWTH LEADERSHIP

Goal 3.1: Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment.

Objective 3.1.1: Develop a plan for the design and funding of a multimodal, interconnected transportation system that sustains local livability and serves regional hubs for global, national, and state distribution of goods and movement of people.

Objective 3.1.2: Ensure that future infrastructure is planned with minimal impact to natural resources.

Goal 3.2: Develop a strong export economy.

Objective 3.2.1: Complete a logistics study for filling empty containers to increase exports.

Objective 3.2.2: Develop a distribution network of hubs that connect to global markets and complement existing networks.

4. BUSINESS CLIMATE & COMPETITIVENESS

Goal 4.1: Encourage local governments to adopt streamlined development approval procedures.

Objective 4.1.1: Identify current development approval procedures in local governments which may be streamlined.

Goal 4.2: Monitor CEDS Performance Measures.

Objective 4.2.1: Create a regional data collection repository by industry and county.

Goal 4.3: Develop projects and programs that sup-

port existing and new business.

Objective 4.3.1: Establish a clearinghouse that incorporates the resources and initiatives of all economic development agencies of local jurisdictions in the region into one regional effort to expand manufacturing and research in the region.

Goal 4.4: Increase investment in business development and placement in the region.

Objective 4.4.1: Establish a clearinghouse that incorporates the resources and initiatives of all business development initiatives of local jurisdictions in the region into one regional effort to educate and assist businesses locate and grow.

5. CIVIC & GOVERNANCE SYSTEMS

Goal 5.1: Improve coordination of economic development, land use, infrastructure, water and natural resource decision making.

Objective 5.1.1: Coordinate local government comprehensive planning and regional strategic planning with capital improvement projects to further regional goals.

Goal 5.2 - Improve public/private/civic cooperation, collaboration, and communication of the region's economic strategies.

Objective 5.2.1: Cooperate on a regional communications, marketing, and programming plan to strengthen and promote a sense of regional identity, expand opportunities, and increase youth retention.

6. QUALITY OF LIFE & QUALITY PLACES

Goal 6.1: Protect natural resources to support quality environment and eco-tourism.

Objective 6.1.1: Provide for connectivity of targeted conservation and preservation lands on both public and private lands.

Objective 6.1.2: Increase conservation lands by supporting local government incentives through comprehensive plan provisions, tax incentives, and other innovative programs to encourage landowners to participate in conservation programs.

Goal 6.2 - Develop projects that improve the region's quality of life.

Objective 6.2.1: Integrate alternative modes of travel, including walkability, in new and existing communities.

Objective 6.2.2: Promote safe, healthy built environments and ensure access to high quality healthcare, including primary, speciality, and ancillary services.

C. CEDS Plan of Action - Each Pillar Becomes a Target Area in the Plan

PLAN OF ACTION

The plan of action implements the goals and objectives of the CEDS in a manner that -

1. Maximizes effective development and use of the workforce consistent with any applicable state or local workforce investment strategy - Talent Supply & Education

2. Obtains and utilizes adequate funds and other resources - Innovation & Economic Development

3. Fosters effective transportation access, promotes the use of technology in economic development, including access to high-speed telecommunications - Infrastructure & Growth Leadership

4. Promotes economic development and opportunity - Business Climate & Competitiveness

5. Balances resources through sound management of physical development - Civic & Governance Systems

6. Enhances and protects the environment - Quality of Life & Quality Places

The CEDS must also contain a section that discusses the methodology for cooperating and integrating the CEDS with a state's economic development priorities.

The SWFRPC EDD will coordinate CEDS projects and activities with county local development entities in the region as well as state and other appropriate agencies and entities. In addition, staff will assist in project development by providing technical assistance in grant preparation, needs analysis, and intergovernmental and public coordination of activities. The plan of action implements the goals and objectives of the CEDS in a manner that cooperates and aligns the CEDS with the state's economic development priorities.

The following actions will occur:

- The CEDS Working Committee shall meet quarterly to monitor status of regional projects,
- The SWFRPC will monitor status of regional coordination,
- The SWFRPC will report on performance measures,
- The SWFRPC and CEDS Working Committee will develop new regional projects,
- County Economic Development staff, Florida Heartland Rural Economic Development Initiative (FHREDI), and Workforce staff will track key indicators, and
- SWFRPC shall convene meetings, compile project status and report to EDA.

SWFRPC staff functioning as the EDD staff will continue to coordinate the CEDS plan by participating in the economic development activities in the region, as well as on local and statewide levels; and by fostering public-private partnerships.

STATE ECONOMIC DEVELOPMENT PRIORITIES

In developing the CEDS and assessing the Goals, Objectives, Programs and Projects, the CEDS Working Committee remained cognizant of the state-wide economic development efforts of Enterprise Florida. The end result is a CEDS that is consistent with, and furthers the efforts of, Enterprise Florida's Roadmap to Florida's Future, 2007~2012 Strategic Plan for Economic Development.

As illustrated by the programs and projects adopted as part of the CEDS, Southwest Florida's economic development objectives parallel the state's goals to: attract and retain globally competitive businesses; create and retain high paying jobs; and maintain a high quality of life throughout Florida.

In addition to being coordinated with Florida's economic development priorities and programs, the CEDS was coordinated with the Regional Economic Development Agencies and Workforce Board.

D. Strategic Projects, Programs and Activities - Priority Projects Under Each Pillar

PROJECT RANKING CRITERIA

Methodology

Development of the 2012-2017 project list was a collaborative effort involving an Oversight Committee, the CEDS Working Committee, localities, other agencies responsible for economic development initiatives. Staff solicited projects for inclusion in the Five Year Plan from the CEDS Working Committee, the Seminole Tribe of Florida, the 22 local governments throughout the region, and other agencies known to have active economic and/or community development projects in the region. The SWFRPC included a comprehensive public outreach campaign to educate and engage local residents to provide input into the CEDS process. Additionally, SWFRPC staff reviewed a number of existing plans, strategies, and regional economic development studies for additional proposed projects.

In order to ensure consistency with the State DEO Five Year Strategic Plan and the Six Pillars framework, staff had to utilize various methods to determine the final Vital Projects list. Deviation from the ranking criteria was necessary due to the many different assumptions and interpretations of the Oversight Committee and the CEDs working Committee. The ranking system was not as useful as expected. Therefore, staff made the final determinations based on regional support, EDA's investment priorities, and project readiness. The CEDS Working Committee was committed to seven Vital Program Areas that embraced almost all of the identified projects submitted by the localities in the region. Additionally, these program areas aligned well with the Six Pillars framework. Staff was able to further translate findings from the ranking list and capture regional importance from the substantial input gathered at the various meetings held throughout the region resulting in the final economic project categories below. The CEDS Working Committee as well as the Strategy Committee approved the Vital Project list.

The Oversight Committee and CEDS Working Committee used the criteria listed below to evaluate the 47 projects included in the 2012-2017, Five Year CEDS Plan. These criteria were applied to each project to calculate a score, and the highest scoring projects were assigned to the Vital Project List. The CEDS Working Committee forwarded the proposed Vital Project List to the CEDS Oversight Committee for approval, with final approval granted by the Council.

1. Project is in accord with U. S. EDA's Investment Policy Guidelines (see above)
   a. Meets at least four of the Investment Priorities including 1, 2, 3, (8 points)
   b. Meets three of the Investment Priorities (6 points)
   c. Meets two of the Investment Priorities (4 points)
   d. Meets one of the Investment Priorities (2 points)
   e. Meets none of the Investment Priorities (0 points)
2. Project demonstrates regional significance (positive multi- jurisdictional impacts)
   a. Project will likely impact the majority of the region's planning area (8 points)
   b. Project will likely impact at least two to three counties (4 points)
   c. Project not likely to impact more than one county (0 points)
3. Project will lead to private investment and new tax revenues
   a. Contributes to private investment and new tax revenue (6 points)
   b. Contributes to private investment or new tax revenues (3 points)
   c. No/Insufficient information (0 points)
4. Project Readiness
   a. Engineering, costs, & approval substantially complete; site control and funding sources identified (6 points)
   a. Preliminary engineering, costs, scope developed (4 points)
   a. Feasibility study completed (2 points)
   a. Feasibility study in progress (1 point)
   a. Early planning stage (0 points)

The 2012-2017 Project list includes 56 individual projects, representing the priorities of the SWFRPC localities and the various agencies involved in economic development related activities in the SWFRPC Region. The following is a discussion of the methodology followed in developing this list of vital projects.

Economic Project Categories

Projects identified as economic development opportunities for the region have been divided into the following three groups based on strategic fit and technical readiness. They are as follows:

VITAL PROJECTS

Top prioritized projects strategically fitting the region's goals as well as the EDA's (or another major funding source's) goals and are technically ready to implement.

IMPORTANT PROJECTS

Projects that are deemed important due to potential impact and importance to the region, but aren't technically ready to implement.

FUTURE PROJECTS

Projects on the horizon that are expected to be developed further within the next five years. This list is an overview of potential projects; new projects may arise at any time.

VITAL PROJECTS

All vital projects will require funding from Federal, State or Local sources.

Table 9: Vital Projects by Pillar

1. TALENT SUPPLY & EDUCATION

Pre-K, Primary/Secondary, Post-Secondary, Workforce Development, STEM

PROGRAM: REGIONAL EDUCATION AND TRAINING FOCUS (STEM, Technology Schools and Workforce)

Vital Projects	Cost	Jobs	Lead Organization
Develop Material Handling Industry of America (MHIA) Training Center for Logistics/manufacturing	$4 M	20	Glades/ Hendry Counties
Regional Pre-Machining Training	$250,000	100	SWF Workforce Development Board/I-Tech Immokalee
Repositioning the talent delivery system in the Southwest Florida Region	$1.5 M	TBD	SWF Workforce Development Board

DEO Strategy: Connect and align education and workforce development programs to develop and retain Florida's current and future talent supply chain and meet employer needs.

2. INNOVATION & ECONOMIC DEVELOPMENT -

Innovation, Commercialization, Entrepreneurism, Global Trade, Economic Development

PROGRAM: REGIONAL ENTREPRENEURIAL SUPPORT (Incubators, Regional One Stop, Economic Gardening)

Vital Projects	Cost	Jobs	Lead Organization
Regional Incubator Network			
Charlotte County Incubator	$4 M	150 Direct/ 300 Indirect	Charlotte County
Expansion of the Immokalee Business Development Center	$1.2 M	TBD	Collier County
AirGlades Airport Development	$25-50 M	TBD	Hendry County
Logistics Center (America Gateway Logistics - Phase 1)	TBD	TBD	Glades County
Southwest Florida International Airport Improvements	$58.1 M	485	Southwest Florida International Airport

DEO Strategy: Grow, sustain, and integrate efforts related to R&D, technology commercialization, and seed capital to create, nurture and expand innovation businesses.

PROGRAM: INDUSTRY CLUSTER DEVELOPMENT (Agricultural Sustainability, Economic Centers and Regional Sports Destination)

Vital Projects	Cost	Jobs	Lead Organization
Research and Enterprise Diamond	$10 M +	1,500	Lee County/FGCU
Mote Marine in Punta Gorda	$4 M	TBD	Mote Marine/Charlotte County
Murdock Village	$20 M	500	Charlotte County

DEO Strategy: Strengthen Florida's leadership in expanding and emerging industry clusters and help transition established clusters to serve new markets.

3. INFRASTRUCTURE & GROWTH LEADERSHIP

Energy, Transportation & Logistics, Water & Environmental Protection, Growth Leadership, Housing, Disaster, Preparedness & Recovery

PROGRAM: REGIONAL INFRASTRUCTURE (Utilities, Transportation, Technological and high-speed Interconnectivity, Waterways, Airports, Disaster Preparedness, Infill housing/redevelopment projects, Brownfield remediation/redevelopment)

Vital Project	Cost	Jobs	Lead Organization
Regional Transportation Plan	$500,000	TBD	SWFRPC/MPOs

DEO Strategy: Coordinate decision-making and investments for economic development, land use, infrastructure, water, energy, natural resources, workforce and community development at the statewide, regional and local levels

4. BUSINESS CLIMATE & COMPETITIVENESS

Risk Management, Taxation, Legal Reform, Regulation, Property Rights

PROGRAM: GLOBAL COMPETITIVENESS(Position the region to compete on a regional, national and global level)

Vital Project	Cost	Jobs	Lead Organization
Establish partnerships for the creation of a Regional Economic Development Agency to promote centralized data and regional marketing efforts	$500,000	4 +	Regional EDO's/FGCU

DEO Strategy: Ensure state, regional and local agencies provide collaborative, seamless, consistent and timely customer service to businesses

5. CIVIC & GOVERNANCE SYSTEMS

Ethics & Elections, Constitutional Amendment Reform, Government Efficiency & Accountability, Justice and Legal Systems, Civil Society

PROGRAM: REGIONAL GUIDANCE AND COLLABORATION

Vital Project	Cost	Jobs	Lead Organization
Create an Ad-Hoc Committee to evaluate and recommend legal & regulatory reform to address government efficiency.	TBD	TBD	SWFRPC

DEO Strategy: Support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life goals

6. QUALITY OF LIFE & QUALITY PLACES

Vibrant & Sustainable Communities, Health & Wellness, Equality & Diversity

PROGRAM: REGIONAL INNOVATION (Sustainable place-making projects that improve the quality of life in the region, Downtown / urban area development)

Vital Project	Cost	Jobs	Lead Organization
Prepare a regional plan and identify place-making projects that improve the quality of life	$4 M	TBD	SWFRPC
Warm Mineral Springs	TBD	TBD	Sarasota County/ North Port
Fort Myers Riverfront Redevelopment Project	$221,946,300	780	Fort Myers/CRA/ Lee County

DEO Strategy: Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors.

VITAL PROJECT DESCRIPTIONS

Table 10: Vital Project Descriptions

Vital Projects	Description
Talent Supply & Education	
Develop Material Handling Industry of America (MHIA) Training Center for Logistics/manufacturing	The project will bring the MHIA Training Center to Glades and Hendry County. The concept is to provide training for students in logistics, IT related to logistics and material handling, truck driver's training and related coursework.
Regional Pre-Machining Training	Public and private partners are developing a regional pre-machining training program that will enable the current workforce to expand skill sets in machinist training, machine operator and computer numerical control. The goal is to offer this program by various local technical schools.
Repositioning the talent delivery system in the Southwest Florida Region	The Regional Business Team – subcommittee of the CEDS Working Group will work towards building a dynamic delivery system for leaders and economic development workforce data.
Innovation & Economic Development	
Charlotte County Incubator	The proposed Smart Technology Center and Business Incubator will provide a unique opportunity to bring about the convergence of technologies surrounding smart home, smart building, and intelligent technology with research and business incubation that will lead to the development of new marketable products.
Expansion of the Immokalee Business Development Center	The Immokalee Business Development Center (IBDC), also known as "Immokalee Biz", addresses the general problem of a weak economic and business climate in Immokalee, and some of the barriers to entry for new businesses. Economic and social conditions are addressed and overcome through a combination of technical assistance, education, training, and business guidance. The IBDC promotes business growth, job creation, and economic growth for the Immokalee Community. The current project of expanding the center (building a structure that will house the business development center and a regional food production center) will add a new program to the incubator by providing a facility to allow small local growers to increase the economic value and consumer appeal of raw farm products and marketing it more directly to the public. Hence, we will have the capability to retrain individuals who were in the agricultural industry to becoming entrepreneurs
AirGlades Airport Development	AirGlades Airport is currently a GA airport that is in the FAA Privatization Program which will create an environment whereas a developer (AirGlades International-already established) will manage/purchase the airport and develop it for aviation/cargo/distribution/manufacturing purposes. There are current infrastructure issues that need to be upgraded/improved. There is already existing interest from large companies to locate at AirGlades creating a huge economic impact for Southwest Florida. The Airport is 2400 acres and expects to create a few thousand jobs/millions in private investment within the next five years. We need infrastructure funds NOW to help kick-start the development.
Logistics Center (America Gateway Logistics - Phase 1)	The AGLC will be located in the center of southern Florida between Fort Myers and Palm Beach in Glades County. The AGLC will focus on the exporting and distribution of manufactured goods by Floridians and North American companies by linking four Florida ports and three international cargo airports on both coasts by road and rail thus advancing the goal of doubling Florida's exports and Florida becoming an international shipping hub (by rail, road, sea and air).
Southwest Florida International Airport Improvements	Southwest Florida International Airport is a major economic engine to the Southwest Florida region. The proposed project will provide for infrastructure improvements to accommodate the continued growth of passenger and cargo movement into and out of the region. These infrastructure improvements will also serve an area that is projected to be the future technology and research employment center for Lee County.

Vital Projects	Description
Innovation & Economic Development	
Research and Enterprise Diamond	The Renewable Energy and Research Diamond is a designated high-tech industrial area targeted by Lee County for economic diversification and job creation. The Renewable Energy and Research Diamond is anchored by Florida Gulf Coast University (FGCU) and the Southwest Florida International Airport, and includes several private-sector industrial, commercial, and research-oriented facilities.
Mote Marine in Punta Gorda	Mote Marine Laboratory is looking at expanding its operation into Charlotte County by developing an aquarium in downtown Punta Gorda. Development of the Charlotte County facility will provide an economic engine to community that will lead to job creation, new business development, and expansion of existing businesses.
Murdock Village	The Murdock Village Community Redevelopment Agency owns approximately 870 acres of vacant land strategically located in central Charlotte County. The area is targeted for a mix of uses that will provide both a tourist destination and a business technology park. The redevelopment of this area will create an economic center for the area.
Infrastructure & Growth Leadership	
Regional Transportation Plan	To facilitate coordination in cooperation with the existing MPOs and other partners to create a comprehensive regional transportation plan for Southwest Florida.
Business Climate & Competitiveness	
Establish partnerships for the creation of a Regional Economic Development Agency to promote centralized data and regional marketing efforts	Create a repository of regional econometric and demographic data and dissemination method (e.g. website) and develop a marketing plan to attract businesses to the region.
Civic & Governance Systems	
Create an Ad-Hoc Committee to evaluate and recommend legal & Regulatory reform to address government efficiency.	Creation of an Ad-Hoc Committee comprised of stakeholders in the six county regions to discuss, identify and address barriers to development and other regional issues. This committee would be tasked with presenting regional solutions and developing a toolkit for Florida governments to streamline the regulatory process.
Quality of Life & Quality Places	
Prepare a regional plan and identify place-making projects that improve the quality of life	1) To develop a coordinated comprehensive regional plan along the east/west corridor (State Road 80 and Caloosahatchee River) in SW Florida for goods and services and identify areas on both sides of the river for development. 2) Identify potential place making areas and projects within the CRA districts.
Warm Mineral Springs	Warm Mineral Springs is an 81 acre site containing Florida's only naturally formed warm water mineral spring. Located in the City of North Port, this historically and archaeologically important asset was purchased by Sarasota County and the City of North Port in 2010 with the goal of developing it into a regional tourist attraction that would promote, eco-tourism, health and wellness and leisure and recreation activities. Development of this project will involve public/private partnerships and collaboration.
Fort Myers Riverfront Redevelopment Project	The Fort Myers Riverfront Redevelopment project is a public-private partnership to establish a regional trade and convention presence in Southwest Florida through the expansion of existing convention facilities, development of hotel and mixed-use structures in the downtown urban core by connecting to the adjoining historic downtown streetscape in a creative space-making effort that enhances public amenities and the sustainable treatment of storm water. The project will generate $75,937,000 in annual spending in the regional economy and establish 780 permanent jobs as an economic development recruitment center for trade shows and cultural activities. Phase I of the project is under construction by the City.

IMPORTANT PROJECTS

Table 11: Important Projects	
Project	Program
Talent Supply & Education	
Regional Technology Study - Focus	Regional Education and Training Focus
Innovation & Economic Development	
GrowFL - Economic Gardening	Regional Entrepreneurial Support
Southwest Florida Enterprise Center Expansion	Regional Entrepreneurial Support
Collier/Naples Airport Improvements	Regional Entrepreneurial Support
Sarasota/Venice Airport Improvements	Regional Entrepreneurial Support
Identify solutions "food deserts"	Industry Cluster Development
Academic Village	Industry Cluster Development
Enterprise Charlotte Airport Park	Industry Cluster Development
Immokalee Tradeport	Industry Cluster Development
Downtown & Central Fort Myers Redevelopment (CRA)	Industry Cluster Development
Regional Industry Cluster Study	Industry Cluster Development
Infrastructure & Growth Leadership	
Provide intra-state connections within the state and regional airports	Regional Infrastructure
4 lane SR 80	Regional Infrastructure
Toledo Blade Blvd. Extension - Charlotte County	Regional Infrastructure
Piper Road North	Regional Infrastructure
Regional Broadband Plan	Regional Infrastructure
Cape Coral/Fort Myers Utility Interconnection Projec Pine Island Road & Burnt Store Widening- Charlotte Phase 3	Regional Infrastructure
Burnt Store Widening – Phase 2	Regional Infrastructure
Pine Island Road & Burnt Store Widening – Cape Coral	Regional Infrastructure
Cape Coral UEP	Regional Infrastructure
Page Field North Quad Phase 2	Regional Infrastructure
Page Field South Danley & N Airport Road Utilities Extension	Regional Infrastructure
Business Climate & Competitiveness	
Study on how to attract Medical Tourism	Global Competitiveness
Signature Projects (Motocross Track, Billy Swamp Safari, Warm Mineral Springs)	Global Competitiveness
A center for urban/rural solutions that would be an objective institution that does/ provides applied research in planning and economic development issues	Global Competitiveness
Quality of Life & Quality Places	
VA Clinic & Development of Veteran's Investment Zone	Regional Innovation

FUTURE PROJECTS

Table 12: Future Projects	
Project	Program
Talent Supply & Education	
Prevent Childhood Obesity by Building Healthy Habits	Regional Education and Training Focus
Innovation & Economic Development	
Main street Moore Haven redevelopment project	Regional Entrepreneurial Support
573 acres of developable land – Cape Coral	Regional Entrepreneurial Support
Commercial Sector Expansion expected as a result of widening	Regional Entrepreneurial Support
Legal & Regulatory reform for the assembly of pre-platted communities for development	Regional Entrepreneurial Support
Regional transfer of development plans and projects	Regional Entrepreneurial Support
Farmland preservation and sustainable agricultural practices	Regional Entrepreneurial Support
State Constitutional amendment reform for the acquisition of property for economic development	Regional Entrepreneurial Support
Infrastructure & Growth Leadership	
Agriculture Impact and Strategy Study	Industry Cluster Development
Extend infrastructure to Glades County Biz and Commerce Park	Regional Infrastructure
Hanson Street Project	Regional Infrastructure
East Water Reclamation Facility	Regional Infrastructure

SOUTHWEST FLORIDA
REGIONAL PLANNING COUNCIL

Comprehensive Economic Development Strategy Team

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ACKNOWLEDGEMENT

The Southwest Florida Regional Planning Council staff would like to thank the members of Council, the Strategy Committee and the CEDS Working Committee for their input in developing the Comprehensive Economic Development Strategy (CEDS).

Further information on this economic development plan may be obtained by contacting Jennifer Pellechio, Planner III, Southwest Florida Regional Planning Council at (239) 338-2550 ext. 218 or email jpellechio@swfrpc.org.

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APPENDIX TECHNICAL REPORT

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APPENDIX - TECHNICAL REPORT

TABLES

ILLUSTRATIONS

A. Analysis of Economic Development Problems and Opportunities - Filtered Through the Lens of the Six Pillars

All measurements are by County.

1. Talent Supply & Education

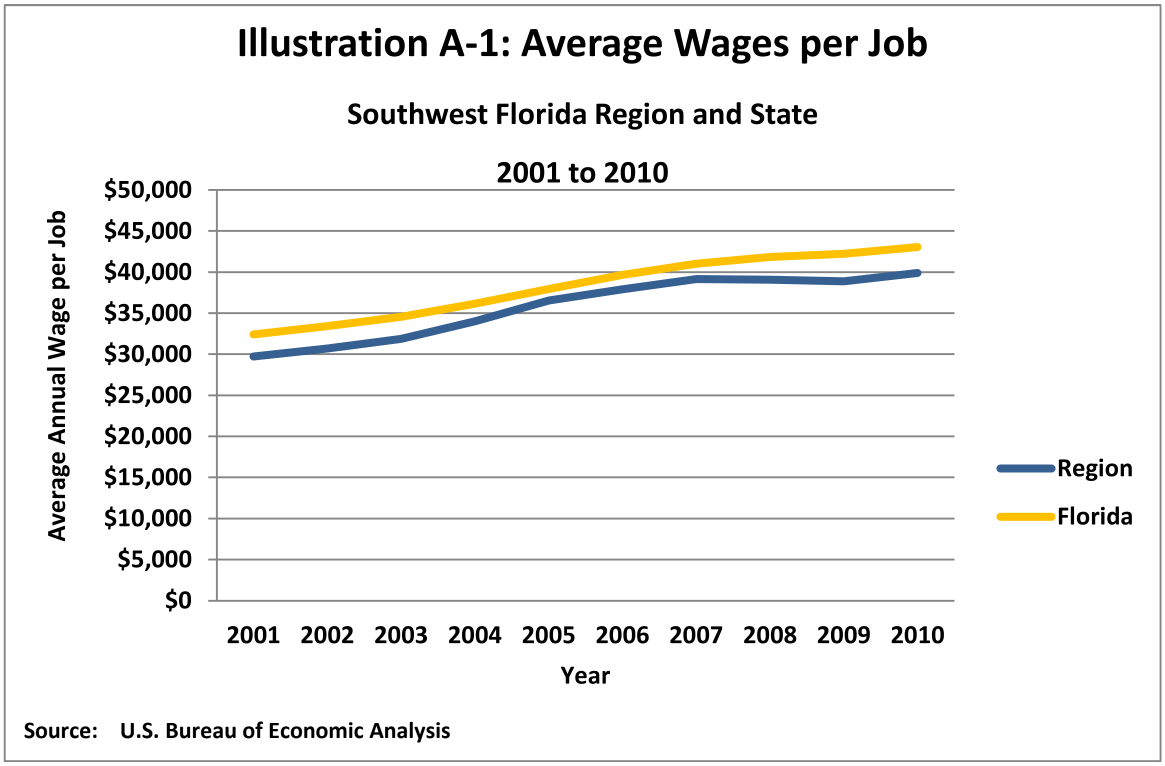
a. Average Annual Wages

Table A-1: Average Wages per Job, Southwest Florida Region and State, 2001 to 2010

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	$25,976	$27,674	$28,893	$30,811	$32,823	$33,258	$33,863	$34,288	$34,013	$34,048
Collier	$31,664	$32,369	$33,660	$35,641	$39,516	$40,686	$43,257	$42,369	$41,871	$43,020
Glades	$21,566	$21,113	$22,550	$25,381	$27,656	$29,097	$30,845	$32,599	$34,503	$34,812
Hendry	$23,763	$25,540	$25,027	$26,002	$26,764	$27,743	$29,398	$29,497	$29,398	$32,924
Lee	$30,272	$31,306	$32,339	$34,833	$36,822	$38,257	$39,202	$39,444	$39,338	$39,498
Sarasota	$27,175	$27,024	$28,402	$29,823	$32,192	$35,282	$34,773	$35,166	$35,760	$40,344
Region	$29,738	$30,705	$31,864	$34,010	$36,549	$37,901	$39,167	$39,081	$38,874	$39,883
Florida	$32,416	$33,406	$34,534	$36,148	$37,951	$39,663	$41,029	$41,818	$42,228	$43,033

Source: U.S. Bureau of Economic Analysis website <www.bea.gov/iTable/iTable.cfm?reqid=70&step=1>

Note: The employment estimates used to compute the average wage are a job, not person, count.
People holding more than one job are counted in the employment estimates for each job they hold.
All state and local area dollar estimates are in current dollars (not adjusted for inflation).

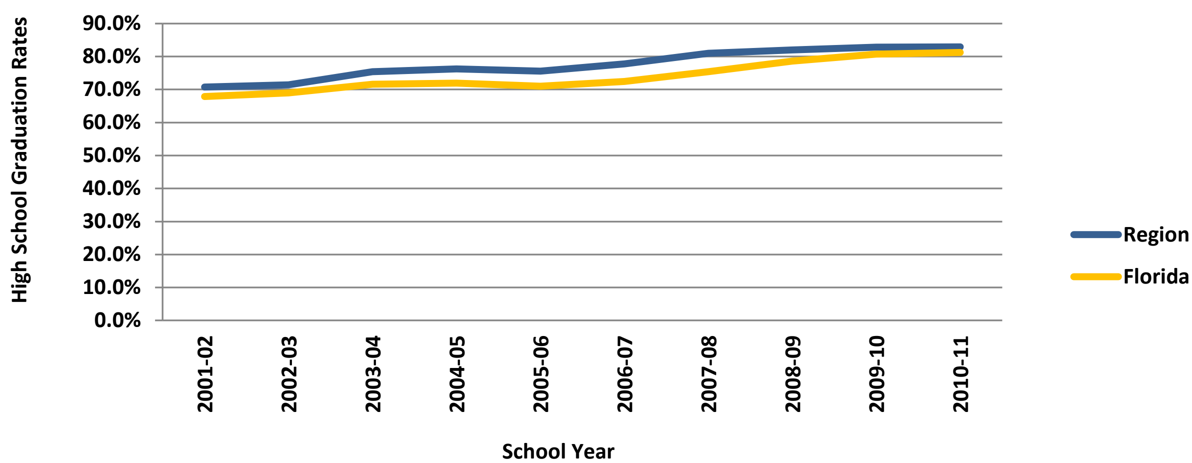


b. High School Graduation Rates

Table A-2: High School Graduation Rates, Southwest Florida Region and State School Years 2001-02 to 2010-11										
Area	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Charlotte	75.8%	68.0%	80.3%	76.7%	78.0%	81.6%	84.6%	84.3%	82.4%	80.2%
Collier	68.2%	67.6%	72.5%	74.3%	74.7%	73.6%	75.8%	78.7%	80.4%	81.3%
Glades	69.6%	76.8%	81.2%	85.4%	78.7%	86.0%	92.1%	96.5%	94.9%	95.8%
Hendry	67.6%	62.0%	72.2%	66.3%	70.3%	72.7%	66.5%	72.6%	76.0%	80.8%
Lee	68.7%	73.0%	72.1%	72.2%	70.1%	73.5%	79.3%	80.8%	82.3%	83.2%
Sarasota	71.8%	76.4%	77.8%	81.7%	79.9%	83.5%	86.0%	85.1%	86.1%	85.4%
Region	70.8%	71.4%	75.4%	76.3%	75.6%	77.8%	81.0%	82.0%	82.8%	82.9%
Florida	67.9%	69.0%	71.6%	71.9%	71.0%	72.4%	75.4%	78.6%	80.7%	81.2%

Source: Florida Department of Education, Data Publications and Reports: Students
www.fldoe.org/eias/eiaspubs/pubstudent.asp

Illustration A-2: High School Graduation Rates
Southwest Florida Region and State
School Years 2001-02 to 2010-11



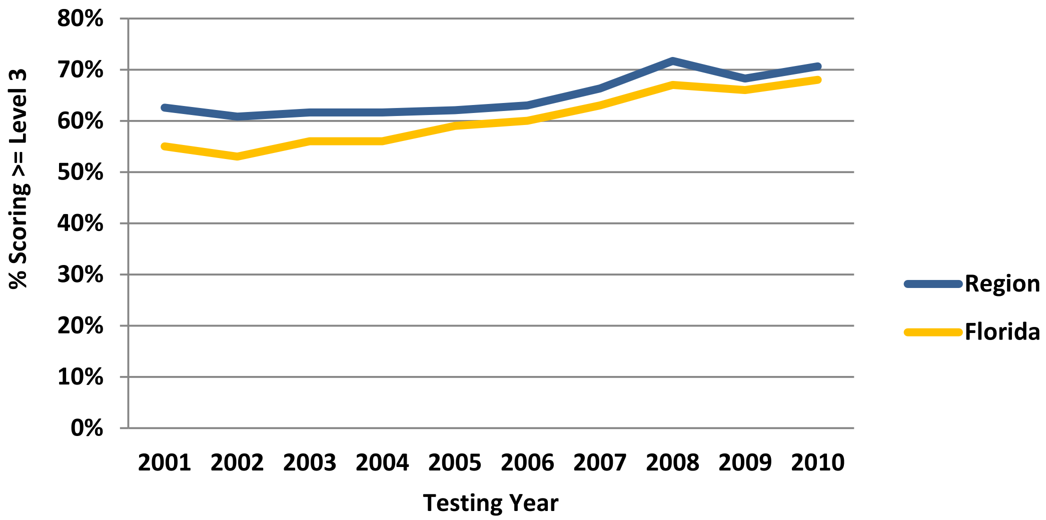
Source: Florida Department of Education, Data Publications and Reports: Students

c. 8th Grade Math Performance

Table A-3: Eighth Grade Math Performance, Percent of Students Scoring at or Above Level 3 of 5 on Florida Comprehensive Assessment Test, Southwest Florida Region and State 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	69%	66%	68%	69%	69%	67%	71%	76%	71%	73%
Collier	60%	58%	58%	60%	59%	61%	64%	69%	66%	69%
Glades	68%	63%	75%	69%	65%	73%	75%	76%	70%	82%
Hendry	50%	48%	55%	46%	49%	51%	50%	61%	54%	62%
Lee	56%	55%	57%	57%	59%	62%	65%	68%	65%	67%
Sarasota	68%	67%	66%	65%	66%	65%	69%	77%	74%	75%
Region	63%	61%	62%	62%	62%	63%	66%	72%	68%	71%
Florida	55%	53%	56%	56%	59%	60%	63%	67%	66%	68%

Source: Florida Department of Education, Florida Comprehensive Assessment Test <https://app1.fldoe.org/FCATDemographics/Selections.aspx?reportTypeID=1&level=District&subj=Math>

Illustration A-3: 8th Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on Florida Comprehensive Assessment Test
Southwest Florida Region and State
2001 to 2010



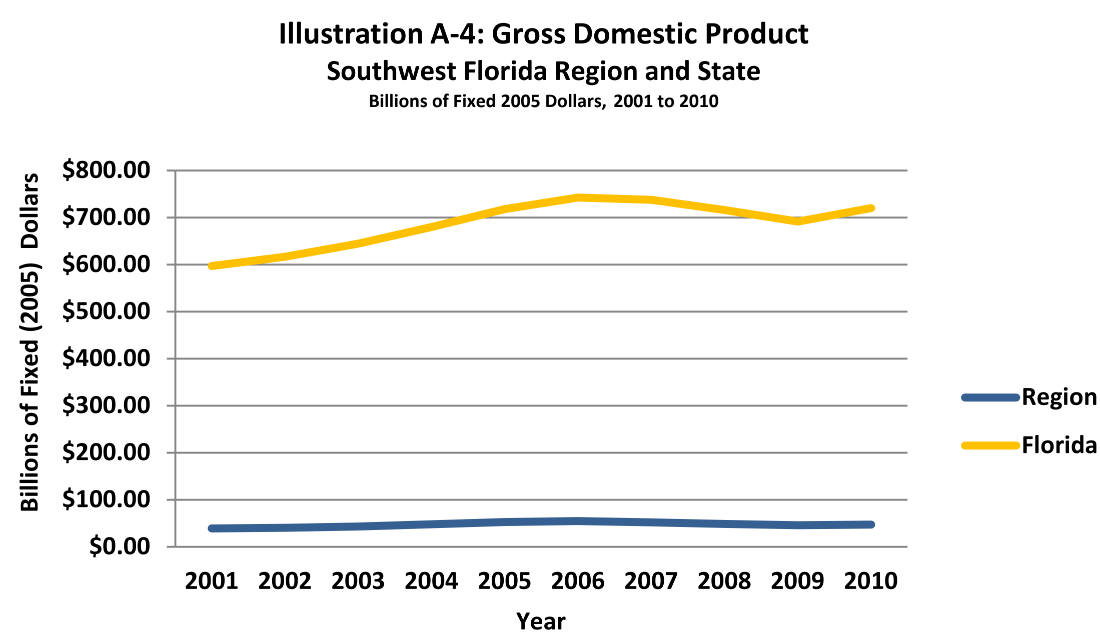
Source: Florida Department of Education, Florida Comprehensive Assessment Test

2. Innovation & Economic Development

a. Gross Domestic Product

Table A-4: Gross Domestic Product, Southwest Florida Region and State Billions of Fixed 2005 Dollars, 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	$2.71	$2.81	$3.02	$3.23	$3.49	$3.71	$3.44	$3.28	$3.08	$3.15
Collier	$9.56	$10.00	$10.68	$11.76	$12.78	$13.10	$12.71	$11.63	$10.72	$10.96
Glades	$0.13	$0.10	$0.10	$0.11	$0.12	$0.14	$0.13	$0.16	$0.16	$0.17
Hendry	$0.85	$0.84	$0.78	$0.89	$1.01	$1.01	$0.98	$0.94	$0.80	$0.83
Lee	$14.81	$15.49	$16.85	$18.76	$21.18	$21.79	$20.78	$19.35	$18.25	$18.71
Sarasota	$10.78	$11.49	$12.01	$13.20	$14.16	$14.62	$14.16	$13.49	$12.76	$13.06
Region	$38.84	$40.73	$43.44	$47.96	$52.74	$54.37	$52.19	$48.84	$45.78	$46.88
Florida	$596.72	$616.75	$644.25	$680.00	$717.59	$742.52	$737.83	$716.05	$691.48	$720.18

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data



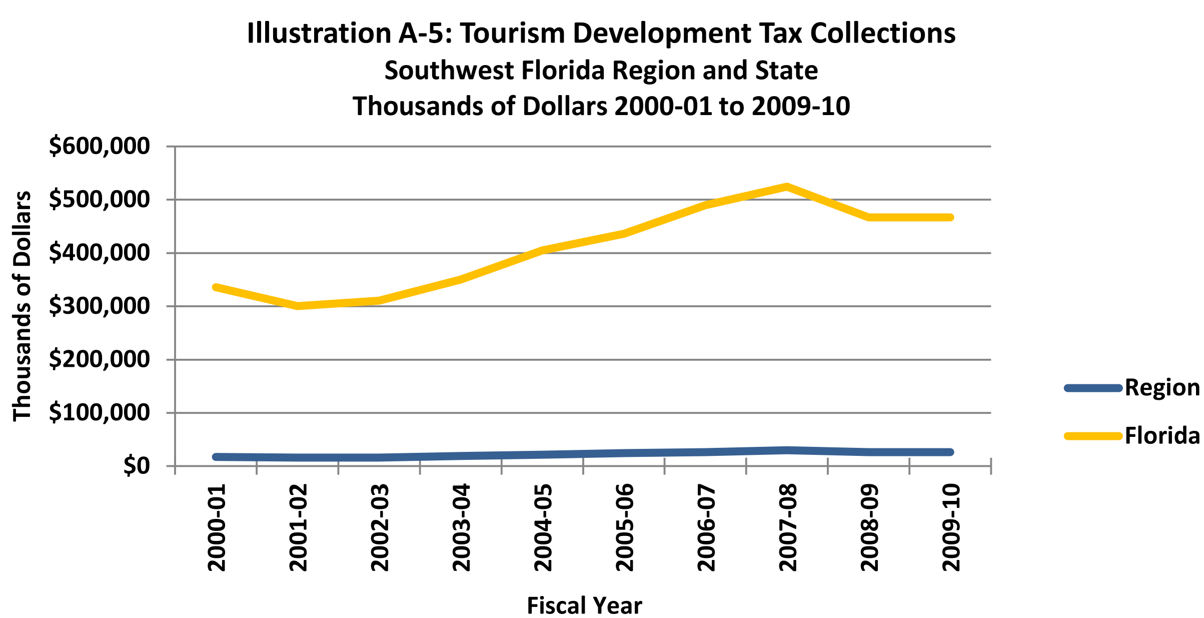
Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

b. Tourism Development Tax Collections

Table A-5: Tourism Development Tax Collections, Southwest Florida Region and State Thousands of Dollars, 2000-01 to 2009-10										
	Fiscal Year									
Area	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Charlotte	$1,308	$1,267	$1,258	$1,384	$1,346	$1,612	$1,818	$2,208	$2,052	$2,108
Collier	$9,151	$8,322	$8,267	$9,400	$10,603	$13,056	$14,155	$14,725	$12,705	$12,814
Glades	$0	$0	$0	$0	$0	$0	$8	$21	$21	$26
Hendry	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Lee	$687	$693	$877	$1,800	$2,056	$2,286	$2,346	$2,341	$1,968	$1,902
Sarasota	$6,247	$5,951	$5,839	$6,607	$7,524	$7,433	$8,066	$10,569	$9,655	$9,729
Region	$17,393	$16,233	$16,241	$19,190	$21,528	$24,386	$26,394	$29,863	$26,401	$26,579
Florida	$335,845	$300,594	$310,386	$350,471	$405,155	$436,165	$489,307	$524,341	$466,657	$466,707

Source: Florida Department of Revenue website, Local Government Tax Receipts by County, <http://dor.myflorida.com/dor/taxes/colls_to_7_2003.html>

Note: Values presented in thousands of dollars.



Source: Florida Department of Revenue, Local Government Tax Receipts by County

c. Trade Exports and Imports

Table A-6a: Trade Exports, Southwest Florida Region and State Billions of Fixed 2005 Dollars, 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	$1.87	$1.91	$2.02	$2.11	$2.30	$2.43	$2.25	$2.11	$1.98	$2.06
Collier	$6.42	$6.54	$7.00	$7.46	$8.31	$8.02	$7.90	$6.98	$6.47	$6.78
Glades	$0.15	$0.10	$0.09	$0.12	$0.13	$0.14	$0.15	$0.16	$0.17	$0.17
Hendry	$0.84	$0.85	$0.83	$0.90	$1.12	$1.02	$1.07	$0.96	$0.79	$0.84
Lee	$8.88	$9.24	$9.87	$10.74	$12.51	$12.22	$11.43	$10.36	$9.97	$10.45
Sarasota	$7.10	$7.40	$7.49	$8.19	$9.04	$9.11	$8.75	$8.06	$7.65	$8.03
Region	$25.27	$26.04	$27.31	$29.51	$33.41	$32.95	$31.56	$28.62	$27.02	$28.33
Florida	$431.06	$440.19	$454.90	$477.68	$507.90	$513.80	$517.27	$494.13	$478.74	$507.02

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

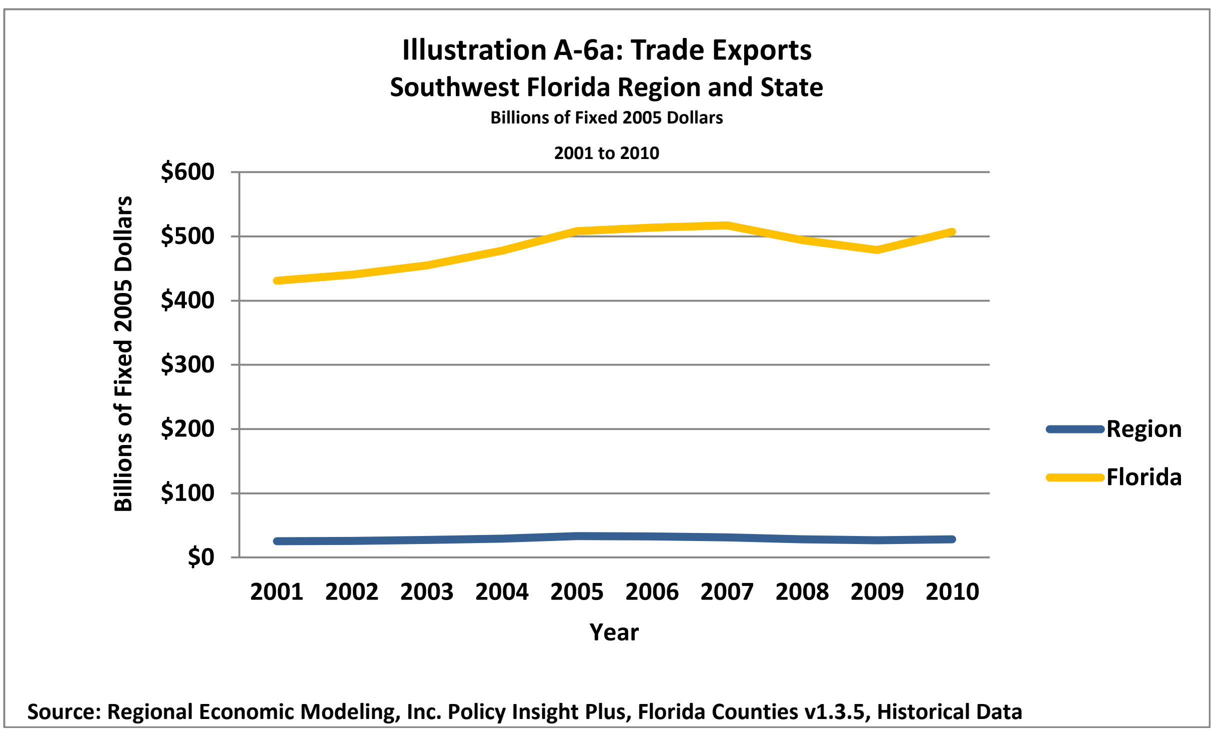
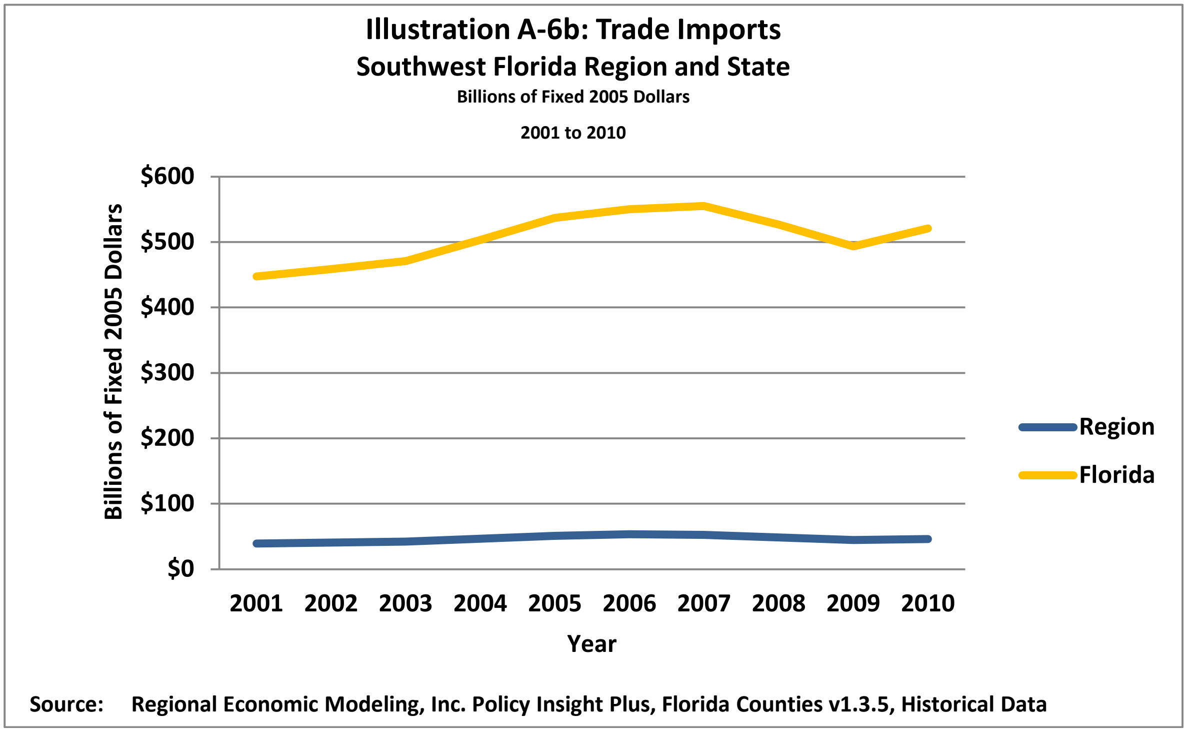


Table A-6b: Trade Imports, Southwest Florida Region and State Billions of Fixed 2005 Dollars, 2001 to 2010										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	$3.45	$3.54	$3.68	$4.06	$4.38	$4.56	$4.42	$4.11	$3.84	$3.98
Collier	$10.49	$10.76	$11.27	$12.77	$13.92	$14.91	$14.43	$13.28	$12.15	$12.51
Glades	$0.33	$0.28	$0.30	$0.31	$0.33	$0.34	$0.33	$0.33	$0.33	$0.34
Hendry	$1.35	$1.35	$1.26	$1.38	$1.47	$1.48	$1.48	$1.37	$1.20	$1.27
Lee	$12.77	$13.36	$14.04	$15.72	$17.62	$18.56	$18.10	$16.63	$15.11	$15.75
Sarasota	$10.72	$11.29	$11.45	$12.50	$13.38	$13.82	$13.61	$12.91	$11.97	$12.44
Region	$39.11	$40.59	$42.00	$46.73	$51.09	$53.66	$52.38	$48.62	$44.60	$46.29
Florida	$447.40	$458.37	$470.73	$503.30	$537.11	$550.05	$555.19	$526.57	$493.46	$520.94

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data



3. Infrastructure & Growth Leadership

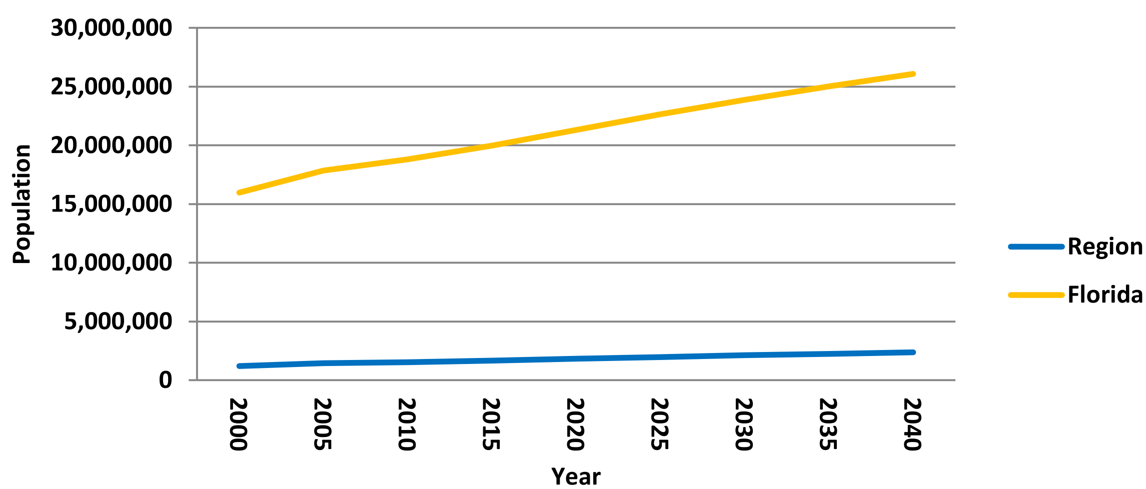
a. Population Counts, Estimates and Projections - Florida Statistical Abstract Table 1.20, 1.40

Table A-7: Population Counts, Estimates and Projections
Southwest Florida Region and State, 2000 to 2040

	Census	Estimate	Census	Projections					
	2000	2005	2010	2015	2020	2025	2030	2035	2040
Charlotte	141,627	154,030	159,978	167,500	176,300	184,900	192,700	200,000	206,700
Collier	251,377	317,788	321,520	350,200	384,400	418,000	449,700	479,000	506,300
Glades	10,576	10,729	12,884	13,700	14,700	15,600	16,500	17,300	18,000
Hendry	36,210	38,376	39,140	40,200	41,500	42,800	44,100	45,200	46,400
Lee	440,888	549,442	618,754	694,200	779,800	863,300	942,700	1,016,900	1,086,600
Sarasota	325,957	367,867	379,448	400,100	424,700	448,600	470,700	490,700	509,000
Region	1,206,635	1,438,232	1,531,724	1,665,900	1,821,400	1,973,200	2,116,400	2,249,100	2,373,000
Florida	15,982,400	17,865,737	18,801,310	19,974,400	21,326,800	22,641,300	23,877,900	25,017,100	26,081,800

Source: Florida Statistical Abstract, 2006-2011 Editions, Tables 1.20, 1.40

Illustration A-7: Population Counts, Estimates and Projections
Southwest Florida Region and State, 2000 to 2040



Source: Florida Statistical Abstract, 2006-2011 Editions, Tables 1.20, 1.40

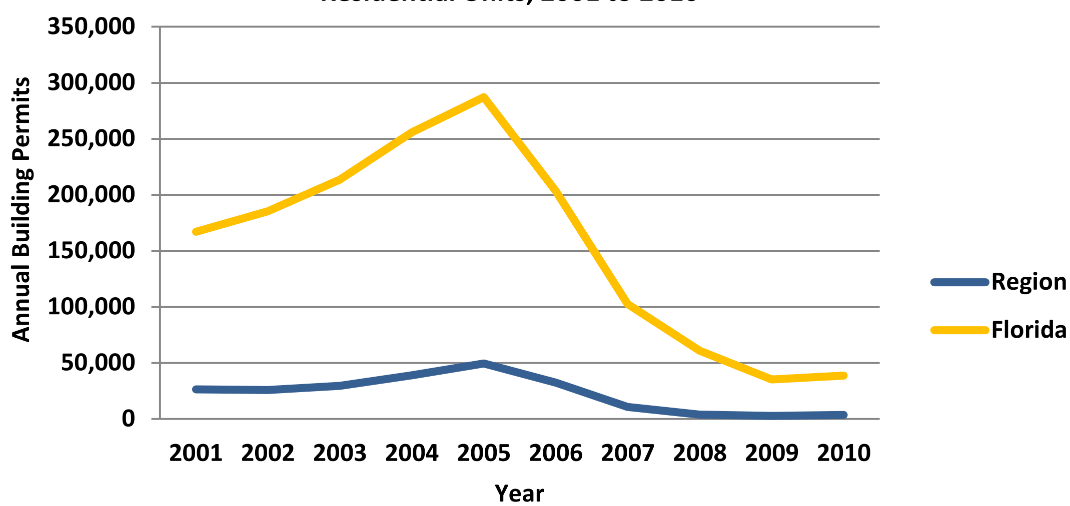
b. Annual Building Permits

Table A-8: Annual Building Permits, Southwest Florida Region and State Residential Units, 2001 to 2010

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	2,126	1,992	2,522	3,652	4,694	4,335	1,370	433	296	425
Collier	8,158	7,282	5,820	6,921	6,622	4,788	2,095	951	944	1,259
Glades	34	24	38	48	85	73	49	18	27	8
Hendry	55	67	96	133	410	284	123	128	54	22
Lee	10,959	11,146	15,675	20,395	29,330	18,746	5,905	1,602	944	1,276
Sarasota	4,984	5,322	5,449	7,906	8,310	4,105	1,234	802	536	708
Region	26,316	25,833	29,600	39,055	49,451	32,331	10,776	3,934	2,801	3,698
Florida	167,035	185,431	213,567	255,893	287,250	203,238	102,551	61,042	35,329	38,679

Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units, for Counties in Florida. http://censtats.census.gov/bldg/bldgprmt.shtml

Illustration A-8: Annual Building Permits
Southwest Florida Region and State
Residential Units, 2001 to 2010



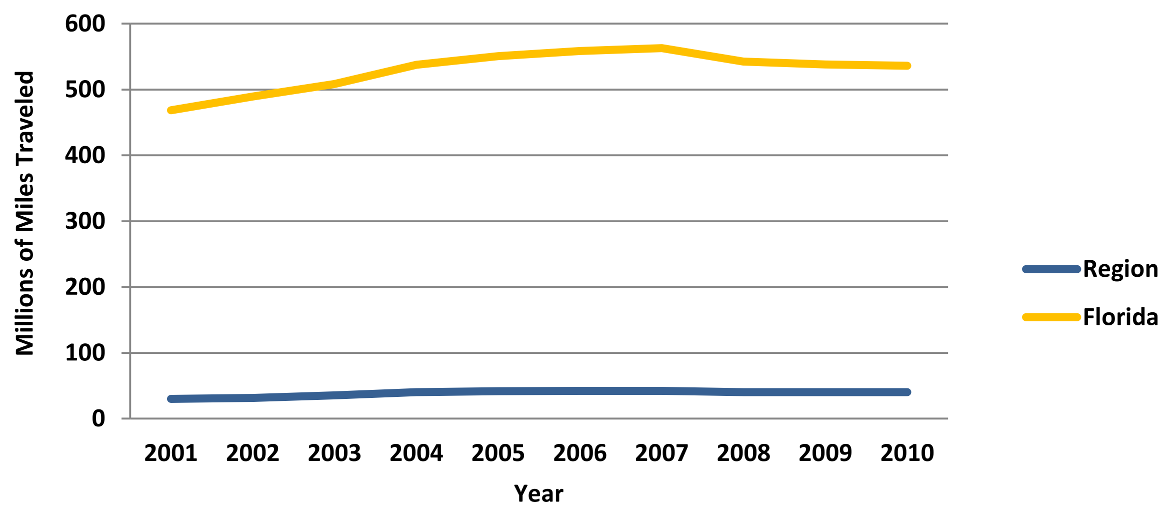
Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units

c. Vehicle Miles Traveled

Table A-9: Daily Vehicle Miles Traveled, Southwest Florida Region and State Millions of Miles, 2001 to 2010										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	4,625,781	4,938,584	6,114,346	6,581,567	6,612,181	6,645,922	6,547,096	6,144,717	6,017,922	6,004,256
Collier	6,072,241	6,023,111	7,907,627	8,406,931	9,096,166	9,488,778	9,475,648	8,996,029	8,851,362	8,943,065
Glades	544,644	587,209	551,757	652,061	604,437	594,175	550,706	541,184	545,473	497,666
Hendry	873,471	885,232	884,976	1,092,936	1,145,919	1,205,424	1,202,457	1,114,696	1,122,946	1,079,455
Lee	13,157,275	13,810,127	14,412,187	17,441,889	18,336,656	18,073,652	18,244,050	17,516,307	17,496,679	17,579,278
Sarasota	4,587,596	5,138,117	5,394,804	5,931,200	5,905,103	6,036,995	6,155,561	5,962,099	6,020,511	6,177,139
Region	29,861,009	31,382,381	35,265,697	40,106,583	41,700,463	42,044,945	42,175,518	40,275,031	40,054,894	40,280,860
Florida	468,573,594	489,536,177	508,607,851	537,494,319	550,614,540	558,308,386	562,798,032	542,334,376	538,088,986	536,315,479

Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990. <http://www.dot.state.fl.us/planning/statistics/mileage-rpts/public.shtm>

Illustration A-9: Daily Vehicle Miles Traveled
Southwest Florida Region and State
Millions of Miles, 2001 to 2010



Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990

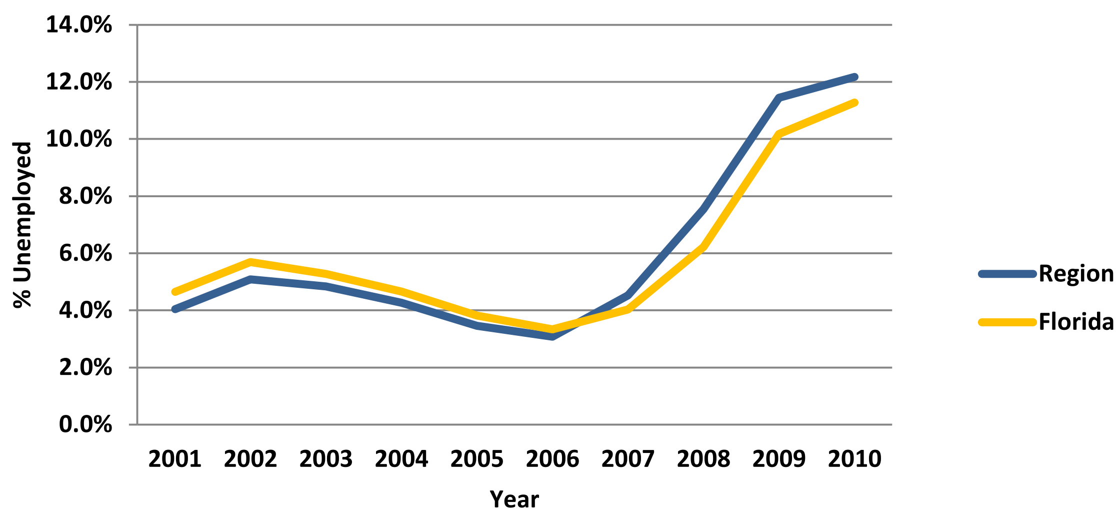
4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

Table A-10: Average Annual Unemployment Rates, Southwest Florida Region and State 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	4.4%	5.6%	5.4%	5.2%	3.9%	3.3%	4.9%	8.0%	11.5%	11.9%
Collier	4.1%	5.1%	4.9%	4.2%	3.4%	3.0%	4.2%	6.8%	10.8%	11.6%
Glades	5.7%	5.9%	5.5%	5.3%	4.8%	3.8%	4.6%	6.7%	9.0%	10.4%
Hendry	7.5%	8.4%	8.4%	8.2%	7.3%	6.2%	7.2%	10.6%	13.9%	14.7%
Lee	3.7%	4.8%	4.6%	4.0%	3.2%	2.9%	4.5%	8.0%	11.9%	12.6%
Sarasota	3.9%	4.8%	4.6%	4.0%	3.4%	3.1%	4.3%	7.0%	11.0%	11.9%
Region	4.0%	5.1%	4.8%	4.3%	3.5%	3.1%	4.5%	7.5%	11.5%	12.2%
Florida	4.6%	5.7%	5.3%	4.7%	3.8%	3.3%	4.0%	6.2%	10.2%	11.3%

Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics
<http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/local-area-unemployment-statistics>

Illustration A-10: Average Annual Unemployment Rates
Southwest Florida Region and State
2001 to 2010

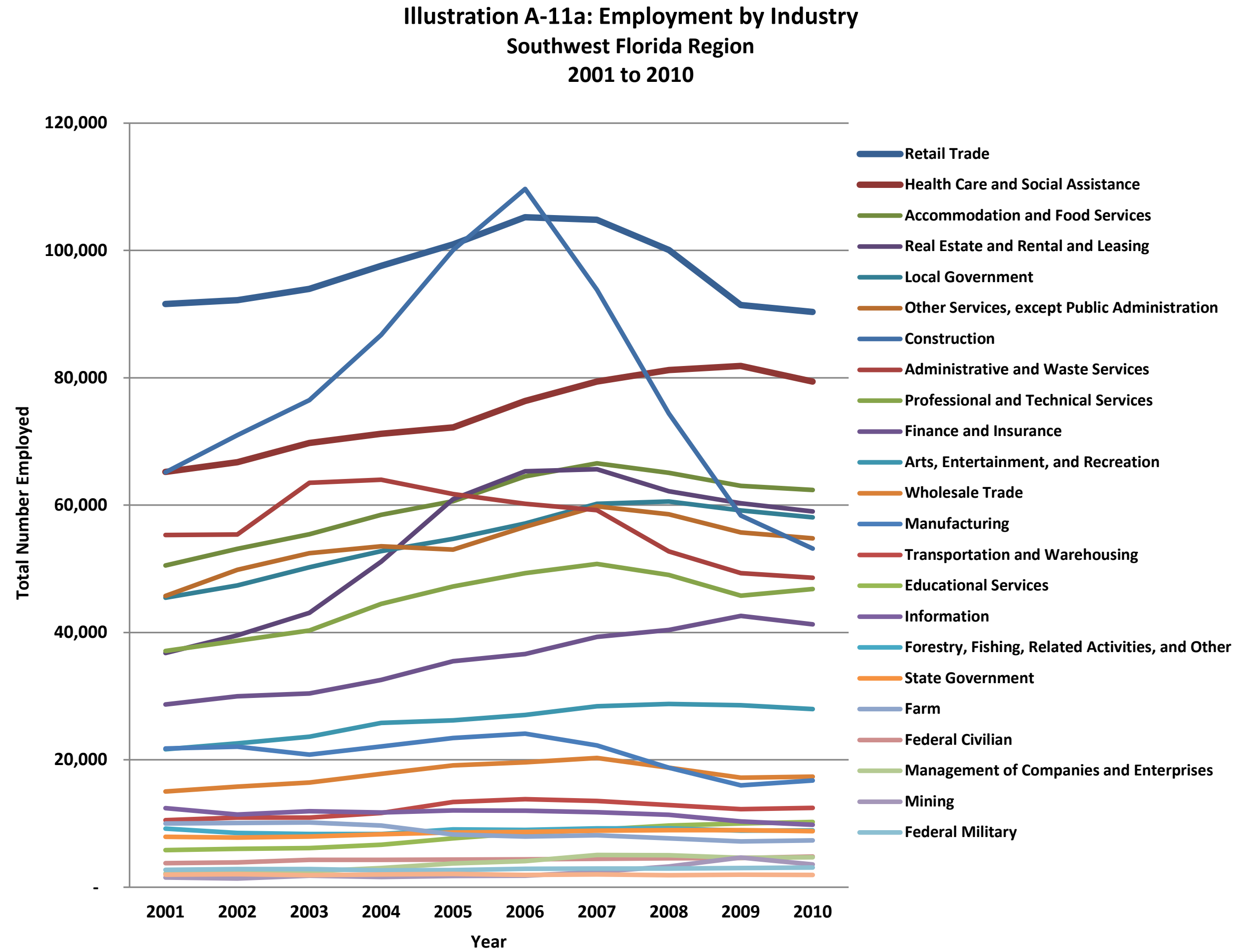


Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics

b. Employment by Industry

Table A-11a: Employment by Industry, Southwest Florida Region 2001 to 2010										
Industry	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Retail Trade	91,595	92,206	93,945	97,580	100,949	105,218	104,829	100,067	91,435	90,353
Health Care and Social Assistance	65,207	66,756	69,748	71,205	72,232	76,345	79,396	81,225	81,878	79,406
Accommodation and Food Services	50,521	53,154	55,442	58,470	60,609	64,522	66,586	65,101	63,030	62,369
Real Estate and Rental and Leasing	36,772	39,548	43,094	51,124	60,921	65,327	65,664	62,192	60,278	59,031
Local Government	45,470	47,403	50,239	52,791	54,713	57,121	60,205	60,585	59,181	58,097
Other Services, except Public Administration	45,763	49,828	52,457	53,536	53,038	56,590	59,804	58,575	55,714	54,776
Construction	65,170	71,009	76,489	86,751	100,056	109,643	93,838	74,399	58,370	53,201
Administrative and Waste Services	55,318	55,403	63,518	64,014	61,744	60,209	59,213	52,749	49,321	48,614
Professional and Technical Services	37,117	38,701	40,319	44,501	47,253	49,343	50,782	49,045	45,769	46,818
Finance and Insurance	28,697	29,970	30,432	32,576	35,502	36,621	39,296	40,415	42,612	41,266
Arts, Entertainment, and Recreation	21,665	22,573	23,626	25,823	26,227	27,064	28,408	28,763	28,585	27,995
Wholesale Trade	15,032	15,780	16,439	17,788	19,134	19,618	20,311	18,774	17,196	17,346
Manufacturing	21,794	22,081	20,819	22,115	23,417	24,138	22,275	18,782	15,996	16,759
Transportation and Warehousing	10,534	10,950	10,953	11,642	13,380	13,812	13,541	12,922	12,250	12,479
Educational Services	5,841	6,027	6,152	6,688	7,695	8,538	9,031	9,675	10,000	10,269
Information	12,411	11,405	11,939	11,753	12,054	12,011	11,791	11,369	10,320	9,804
Forestry, Fishing, Related Activities, and Other	9,208	8,520	8,356	8,363	9,096	9,009	9,248	9,244	8,899	8,925
State Government	7,931	7,815	7,952	8,333	8,590	8,663	8,884	8,954	8,960	8,797
Farm	10,019	10,077	10,184	9,683	8,283	7,977	8,152	7,685	7,214	7,369
Federal Civilian	3,794	3,886	4,293	4,282	4,335	4,395	4,455	4,535	4,588	4,807
Management of Companies and Enterprises	2,178	2,478	2,508	3,024	3,756	4,084	5,068	5,013	4,621	4,705
Mining	1,544	1,365	1,817	1,618	1,775	1,792	2,402	3,244	4,678	3,560
Federal Military	2,721	2,849	2,867	2,652	2,689	2,887	2,949	2,932	2,998	3,099
Utilities	1,989	2,054	1,898	1,991	2,091	1,941	2,009	1,884	1,978	1,924

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.3, U.S. Bureau of Economic Analysis Data

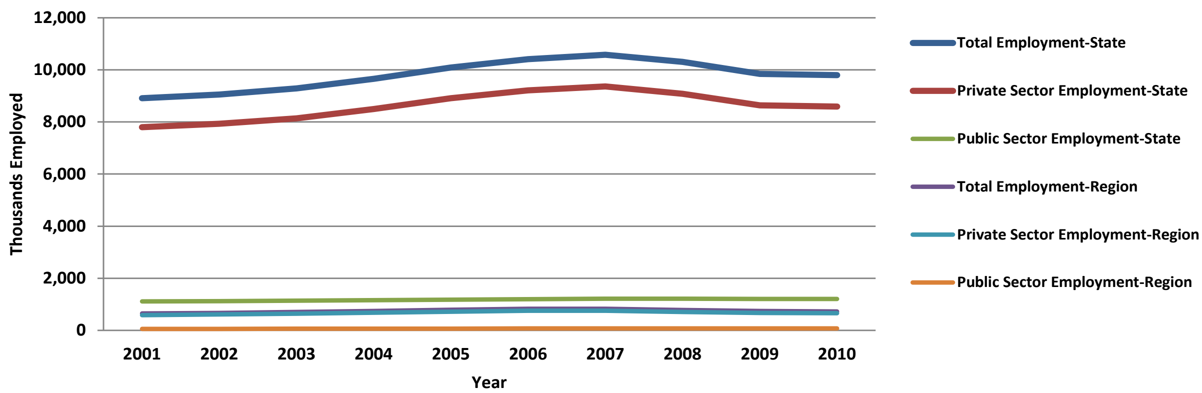


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Table A-11b: Employment by Sector, Southwest Florida Region and State 2001 to 2010										
Sector	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Employment-Region	648	672	705	748	790	827	828	788	746	732
Total Employment-State	8,915	9,054	9,284	9,660	10,086	10,407	10,577	10,304	9,840	9,796
Private Sector Employment-Region	588	610	640	680	719	754	752	711	670	657
Private Sector Employment-State	7,803	7,929	8,143	8,499	8,909	9,211	9,363	9,085	8,636	8,588
Public Sector Employment-Region	60	62	65	68	70	73	76	77	76	75
Public Sector Employment-State	1,112	1,125	1,141	1,161	1,178	1,195	1,214	1,220	1,204	1,208

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-11b: Employment by Sector
Southwest Florida Region and State, 2001 to 2010

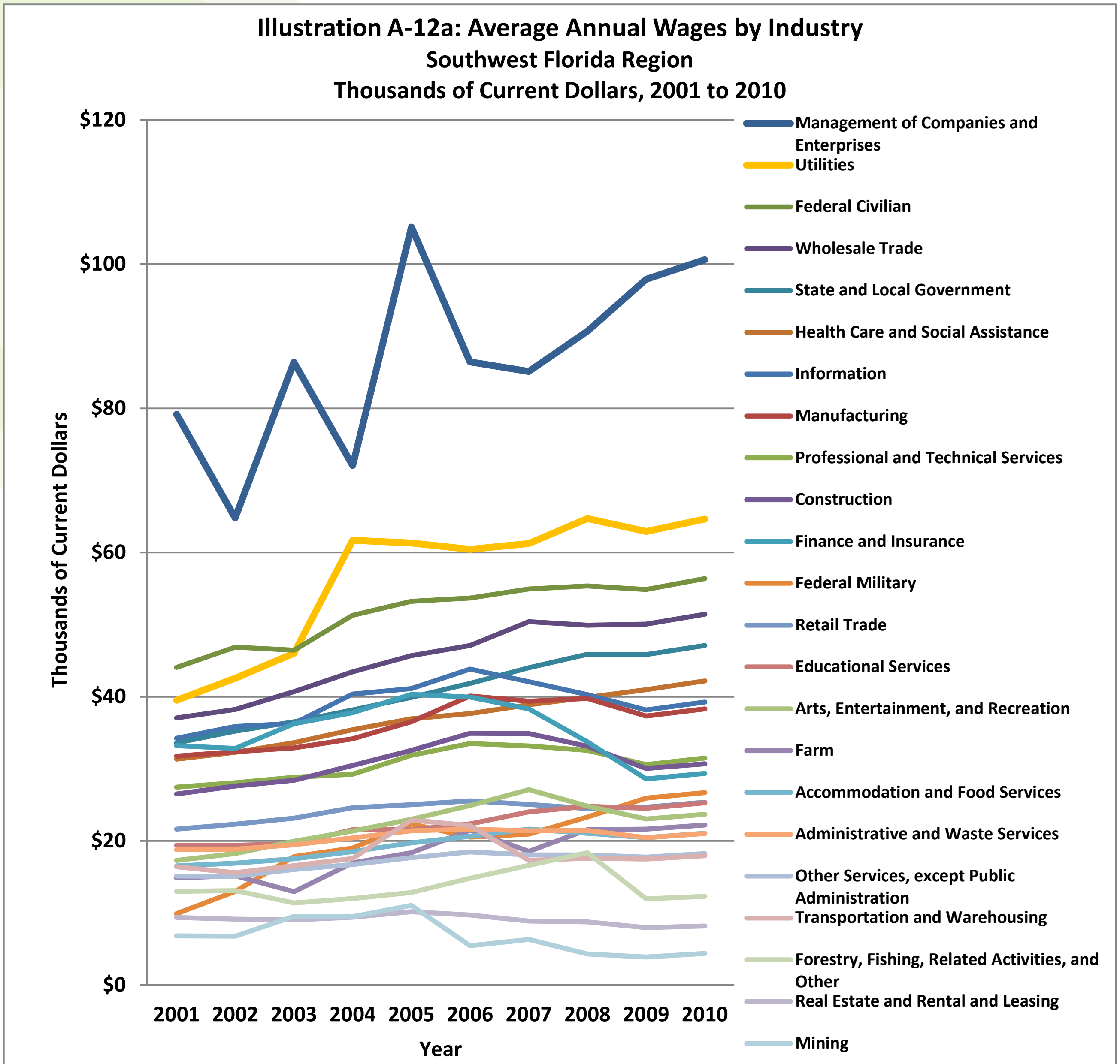


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

c. Wages by Industry

Table A-12a: Average Annual Wages by Industry, Southwest Florida Region Thousands of Current Dollars, 2001 to 2010										
Industry	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Management of Companies and Enterprises	$79.2	$64.8	$86.4	$72.1	$105.2	$86.4	$85.1	$90.7	$97.9	$100.6
Utilities	$39.5	$42.5	$46.0	$61.7	$61.3	$60.5	$61.3	$64.7	$62.9	$64.6
Federal Civilian	$44.1	$46.9	$46.5	$51.3	$53.2	$53.7	$54.9	$55.4	$54.9	$56.4
Wholesale Trade	$37.0	$38.2	$40.7	$43.5	$45.7	$47.1	$50.4	$49.9	$50.1	$51.4
State and Local Government	$33.6	$35.2	$36.5	$38.2	$39.9	$41.9	$44.0	$45.9	$45.8	$47.1
Health Care and Social Assistance	$31.3	$32.3	$33.6	$35.4	$36.9	$37.7	$38.9	$39.9	$41.0	$42.2
Information	$34.2	$35.9	$36.3	$40.4	$41.1	$43.8	$42.1	$40.3	$38.1	$39.3
Manufacturing	$31.8	$32.4	$32.9	$34.2	$36.5	$40.1	$39.4	$39.7	$37.3	$38.3
Professional and Technical Services	$27.5	$28.1	$28.8	$29.3	$31.9	$33.5	$33.2	$32.6	$30.6	$31.5
Construction	$26.5	$27.6	$28.4	$30.5	$32.6	$34.9	$34.9	$33.1	$30.1	$30.7
Finance and Insurance	$33.2	$32.8	$36.2	$37.8	$40.3	$39.9	$38.3	$33.7	$28.6	$29.4
Federal Military	$9.9	$13.0	$17.8	$19.0	$22.4	$20.5	$20.9	$23.3	$25.9	$26.7
Retail Trade	$21.6	$22.3	$23.1	$24.6	$25.0	$25.6	$25.1	$24.5	$24.7	$25.3
Educational Services	$19.4	$19.4	$19.6	$21.5	$21.6	$22.3	$24.0	$24.8	$24.5	$25.3
Arts, Entertainment, and Recreation	$17.3	$18.3	$19.9	$21.4	$23.0	$24.9	$27.1	$24.8	$23.0	$23.7
Farm	$14.8	$15.1	$12.9	$17.0	$18.4	$21.5	$18.5	$21.6	$21.6	$22.2
Accommodation and Food Services	$16.5	$16.9	$17.5	$18.5	$19.7	$20.6	$21.6	$21.0	$20.5	$21.1
Administrative and Waste Services	$18.8	$18.8	$19.5	$20.4	$21.4	$21.6	$21.4	$21.4	$20.5	$21.0
Other Services, except Public Administration	$15.1	$15.1	$16.0	$16.7	$17.7	$18.5	$18.1	$18.1	$17.8	$18.3
Transportation and Warehousing	$16.4	$15.6	$16.6	$17.6	$22.9	$22.1	$17.3	$17.6	$17.5	$17.9
Forestry, Fishing, Related Activities, and	$13.0	$13.1	$11.4	$12.0	$12.8	$14.8	$16.6	$18.4	$12.0	$12.3
Real Estate and Rental and Leasing	$9.4	$9.1	$9.0	$9.4	$10.2	$9.7	$8.9	$8.8	$8.0	$8.2
Mining	$6.8	$6.8	$9.5	$9.5	$11.0	$5.4	$6.3	$4.3	$3.9	$4.4

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

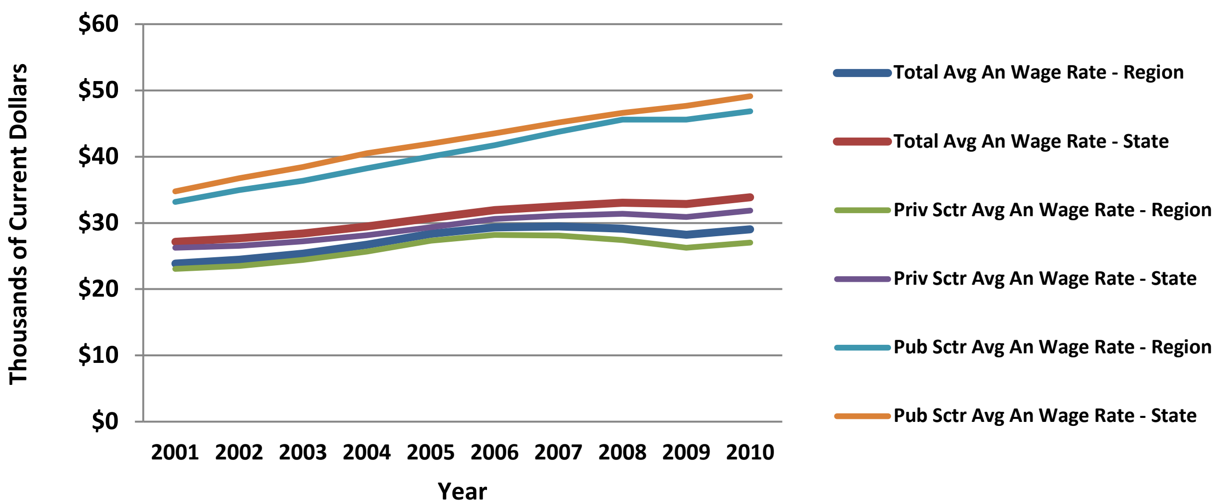


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Table A-12b: Average Annual Wages by Sector, Southwest Florida Region and State Thousands of Current Dollars, 2001 to 2010										
Sector	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Avg An Wage Rate - Region	$23.9	$24.4	$25.3	$26.7	$28.4	$29.3	$29.5	$29.2	$28.2	$29.0
Total Avg An Wage Rate - State	$27.1	$27.7	$28.4	$29.5	$30.7	$32.0	$32.5	$33.0	$32.8	$33.9
Priv Sctr Avg An Wage Rate - Region	$23.1	$23.5	$24.4	$25.7	$27.3	$28.2	$28.1	$27.4	$26.3	$27.0
Priv Sctr Avg An Wage Rate - State	$26.2	$26.6	$27.2	$28.2	$29.4	$30.6	$31.1	$31.4	$30.9	$31.9
Pub Sctr Avg An Wage Rate - Region	$33.2	$34.9	$36.4	$38.2	$40.1	$41.7	$43.8	$45.6	$45.6	$46.9
Pub Sctr Avg An Wage Rate - State	$34.8	$36.7	$38.4	$40.5	$42.0	$43.5	$45.2	$46.6	$47.7	$49.1

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-12b: Average Annual Wages by Sector
Southwest Florida Region and State
Thousands of Current Dollars, 2001 to 2010



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

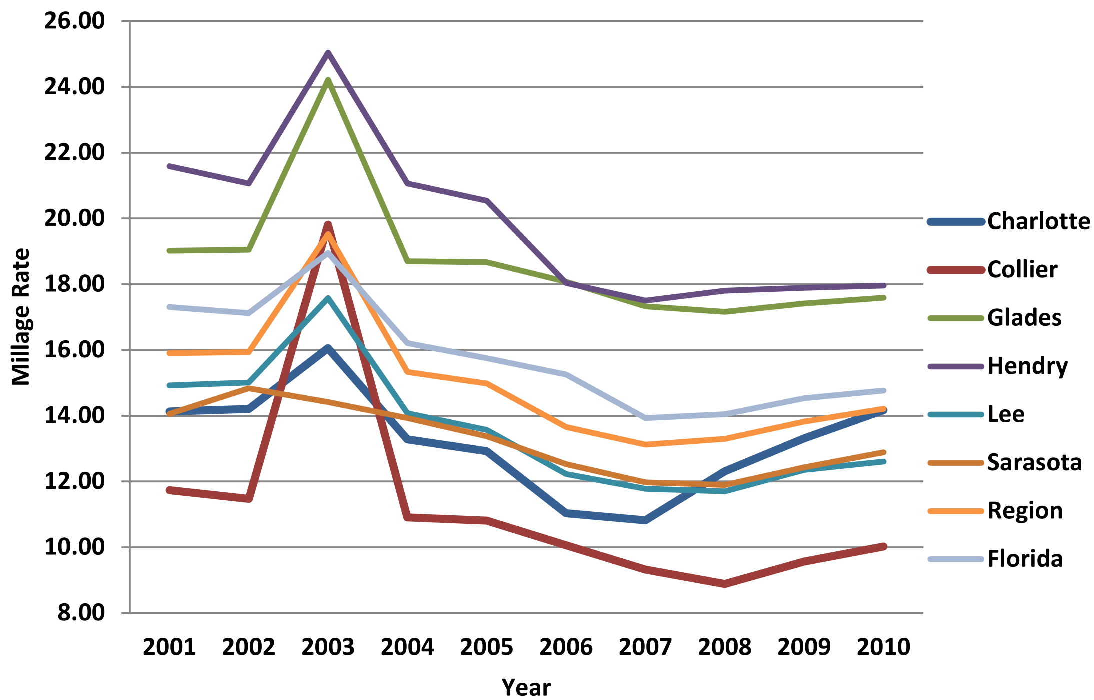
5. Civic & Governance Systems

a. Millage Rates

Table A-13: Millage Rates, Southwest Florida Region and State 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	14.13	14.20	16.06	13.28	12.92	11.03	10.82	12.31	13.31	14.17
Collier	11.73	11.47	19.82	10.91	10.81	10.06	9.32	8.88	9.56	10.02
Glades	19.02	19.05	24.22	18.70	18.67	18.08	17.33	17.16	17.41	17.59
Hendry	21.59	21.06	25.05	21.07	20.54	18.04	17.50	17.80	17.89	17.96
Lee	14.92	15.01	17.58	14.08	13.56	12.22	11.77	11.70	12.35	12.61
Sarasota	14.05	14.84	14.42	13.93	13.38	12.53	11.98	11.90	12.43	12.89
Region	15.91	15.94	19.52	15.33	14.98	13.66	13.12	13.29	13.82	14.21
Florida	17.31	17.12	18.96	16.20	15.75	15.25	13.93	14.05	14.53	14.77

Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections; Florida Ad Valorem Valuation and Tax Data 2001 to 2010; Millage and Taxes Levied Report <http://dor.myflorida.com/dor/property/resources/data.html>

Illustration A-13: Millage Rates
Southwest Florida Region, 2001 to 2010



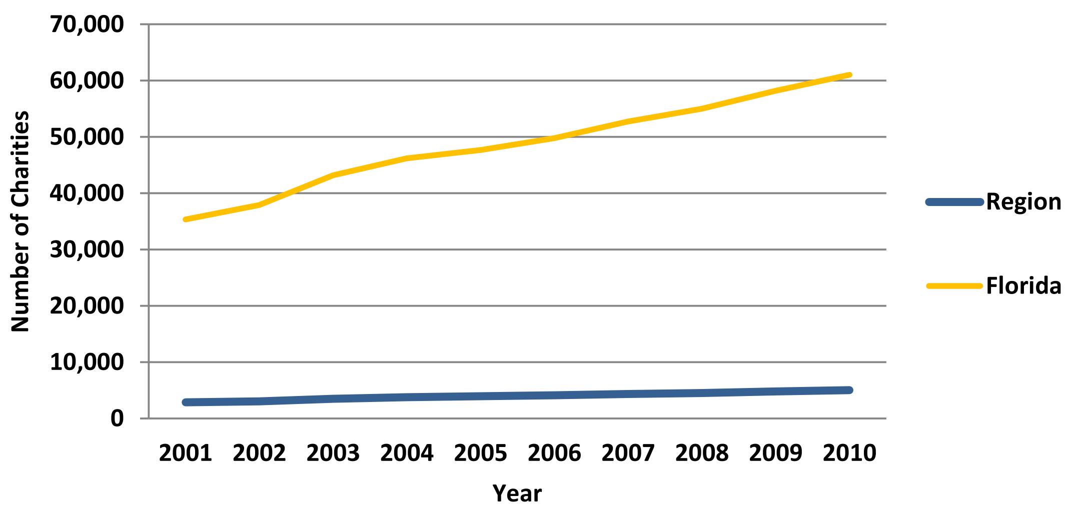
Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations

Table A-14: Registered 501(c)3 Organizations, Public and Private Foundation Charities Southwest Florida Region and State, 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	236	255	298	314	321	335	347	355	371	396
Collier	578	629	757	816	868	935	994	1,098	1,164	1,213
Glades	9	10	13	13	12	14	15	17	21	20
Hendry	60	66	76	78	81	85	95	99	102	102
Lee	919	983	1,132	1,230	1,287	1,361	1,426	1,492	1,575	1,708
Sarasota	1,054	1,122	1,228	1,329	1,373	1,410	1,468	1,499	1,561	1,612
Region	2,856	3,065	3,504	3,780	3,942	4,140	4,345	4,560	4,794	5,051
Florida	35,368	37,894	43,176	46,191	47,690	49,817	52,756	55,048	58,209	61,047

Source: Internal Revenue Service, Exempt Organizations Business Master File, (501(c)(3) Charities
The Urban Institute, National Center for Charitable Statistics, <http://nccsdataweb.urban.org/tablewiz/pc.php> ©2012

Illustration A-14: 501(c)3 Public and Private Charities
Southwest Florida Region and State, 2001 to 2010

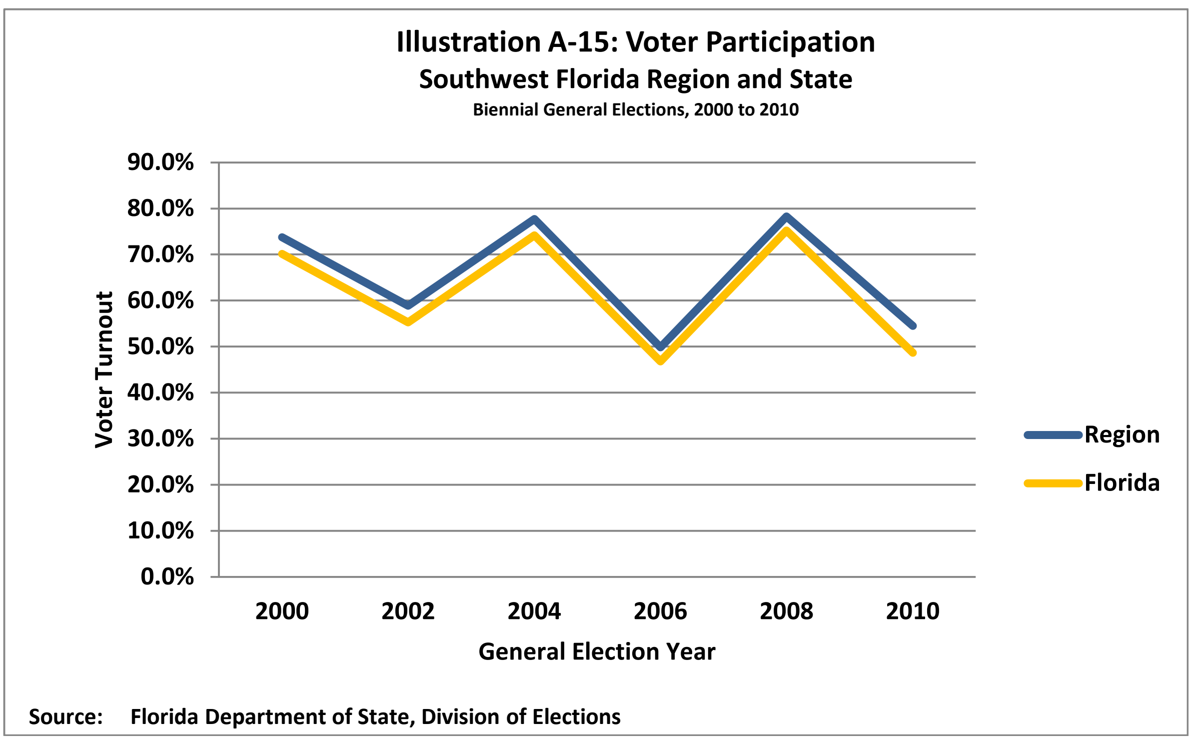


Source: The Urban Institute, National Center for Charitable Statistics

c. Voter Participation

Table A-15: Voter Participation, Southwest Florida Region and State Biennial General Elections, 2000 to 2010						
	General Election Year					
Area	2000	2002	2004	2006	2008	2010
Charlotte	70.9%	57.7%	70.5%	47.6%	72.4%	52.0%
Collier	77.1%	60.5%	76.6%	47.1%	70.5%	57.9%
Glades	58.8%	51.8%	70.5%	46.2%	65.2%	42.9%
Hendry	55.0%	41.8%	57.3%	35.1%	64.8%	41.2%
Lee	74.7%	57.9%	79.3%	47.7%	84.8%	53.2%
Sarasota	73.8%	61.0%	81.6%	56.9%	80.1%	56.1%
Region	73.7%	58.9%	77.7%	49.9%	78.2%	54.5%
Florida	70.1%	55.3%	74.2%	46.8%	75.2%	48.7%

Source: Florida Department of State, Division of Elections
<https://doe.dos.state.fl.us/elections/resultsarchive/Index.asp?ElectionDate=11/2/2004&DATAMODE=>

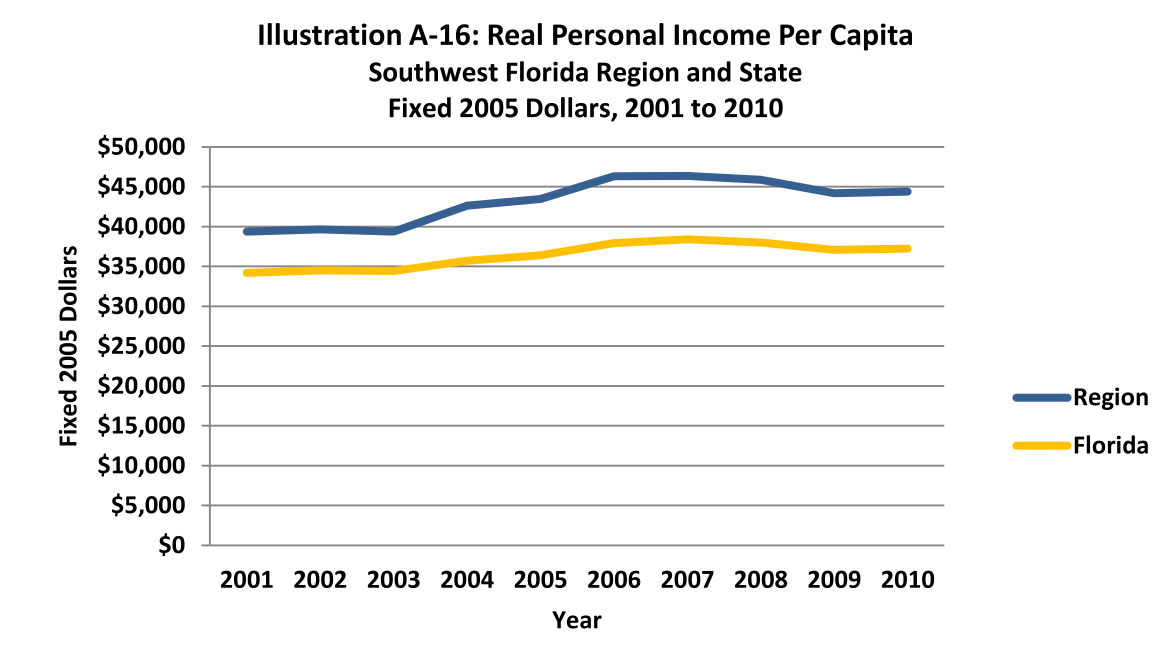


6. Quality of Life & Quality Places

a. Per Capita Income

Table A-16: Real Personal Per Capita Income, Southwest Florida Region and State Fixed 2005 Dollars, 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	$30,062	$29,480	$29,116	$31,061	$32,389	$34,078	$34,724	$34,465	$33,938	$34,268
Collier	$45,577	$45,753	$45,552	$50,919	$52,133	$56,825	$57,514	$56,324	$53,276	$53,519
Glades	$21,323	$20,140	$19,838	$20,546	$21,192	$22,360	$23,733	$22,900	$23,798	$24,509
Hendry	$23,855	$24,243	$22,935	$23,609	$24,311	$26,167	$26,235	$25,293	$24,823	$25,864
Lee	$35,441	$35,517	$35,556	$38,311	$39,151	$41,110	$40,435	$39,638	$38,076	$38,264
Sarasota	$46,194	$47,193	$46,600	$49,774	$50,038	$53,462	$54,101	$54,563	$53,101	$53,001
Region	$39,366	$39,639	$39,381	$42,634	$43,480	$46,311	$46,369	$45,854	$44,191	$44,380
Florida	$34,195	$34,509	$34,416	$35,708	$36,408	$37,905	$38,413	$38,016	$37,063	$37,235

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

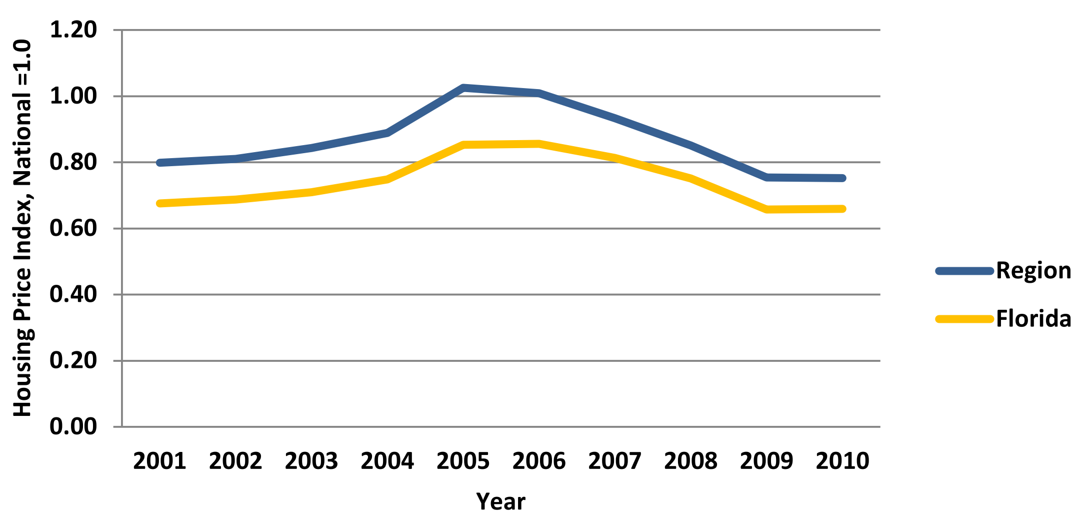
b. House Price Cost Index

Table A-17: Relative Housing Price, Southwest Florida Region and State
National Index = 1.0, 2001 to 2010

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	0.63	0.63	0.65	0.67	0.76	0.78	0.72	0.66	0.61	0.61
Collier	1.07	1.07	1.10	1.15	1.29	1.33	1.22	1.12	1.04	1.04
Glades	0.46	0.46	0.47	0.49	0.55	0.57	0.52	0.48	0.44	0.44
Hendry	0.38	0.38	0.39	0.41	0.46	0.48	0.44	0.40	0.37	0.37
Lee	0.60	0.60	0.62	0.64	0.72	0.75	0.69	0.63	0.59	0.58
Sarasota	0.85	0.88	0.95	1.02	1.24	1.11	1.04	0.94	0.74	0.74
Region	0.80	0.81	0.84	0.89	1.03	1.01	0.93	0.85	0.75	0.75
Florida	0.68	0.69	0.71	0.75	0.85	0.86	0.81	0.75	0.66	0.66

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

Illustration A-17: Relative Housing Price
Southwest Florida Region and State
National Index = 1.0, 2001 to 2010



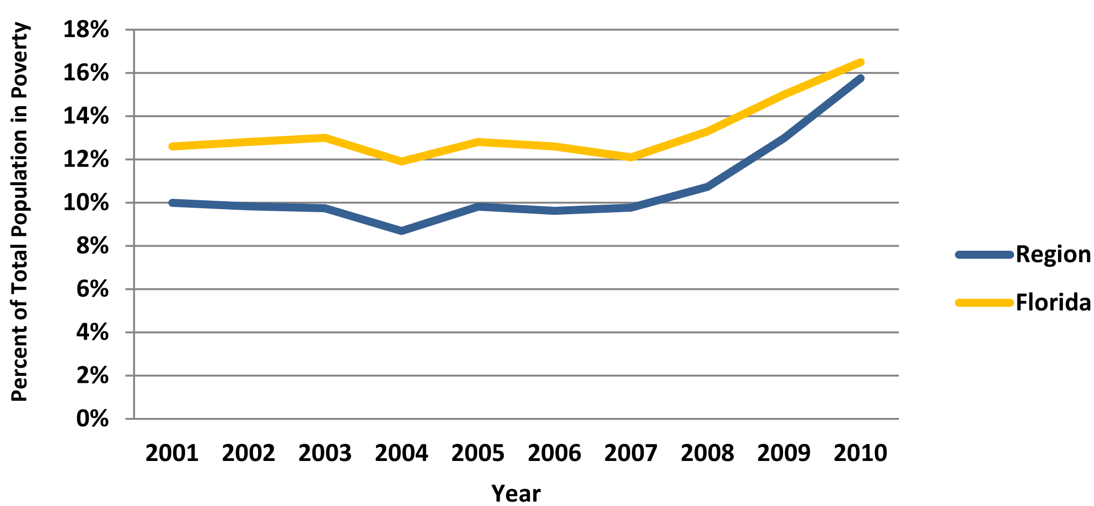
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

c. Persons Living in Poverty

Table A-18: Percent of Persons Living in Poverty, Southwest Florida Region and State 2001 to 2010										
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Charlotte	10.2%	10.1%	9.3%	8.1%	9.6%	8.5%	9.2%	10.3%	12.2%	13.9%
Collier	9.7%	9.6%	9.6%	8.8%	9.6%	9.8%	9.9%	10.2%	12.6%	15.7%
Glades	17.0%	15.5%	13.2%	12.1%	15.2%	15.8%	16.4%	21.8%	21.5%	21.0%
Hendry	20.1%	18.7%	18.1%	16.7%	22.2%	22.7%	20.0%	23.8%	22.6%	26.7%
Lee	10.3%	10.1%	10.2%	8.9%	9.5%	9.2%	10.1%	10.6%	12.8%	17.1%
Sarasota	8.4%	8.4%	8.4%	7.6%	9.1%	9.0%	8.1%	9.9%	12.7%	13.1%
Region	10.0%	9.8%	9.7%	8.7%	9.8%	9.6%	9.8%	10.7%	13.0%	15.8%

Source: U.S. Department of Commerce, Census Bureau, <http://www.census.gov/>

Illustration A-18: Poverty Rates
Southwest Florida Region and State, 2001 to 2010



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

7. Shift-Share Analysis

A shift share analysis dissects employment growth/decline of a specific industry in the region over a multi-year time period into three categories, Share Change, Mix Change, and Shift Change. Share Change is the change due to general national growth, or the growth rate of the region compared to the growth rate of the nation. Mix Change is attributed to the industry growth, or the difference in the industry growth in the region compared to the industry growth that would have occurred at the national growth rate for that industry. Shift Change is the competitiveness of the region, or the difference between the regional industry change in employment compared to the employment change, if the region's industries had grown at the rate of the nation.

The equation is as follows:

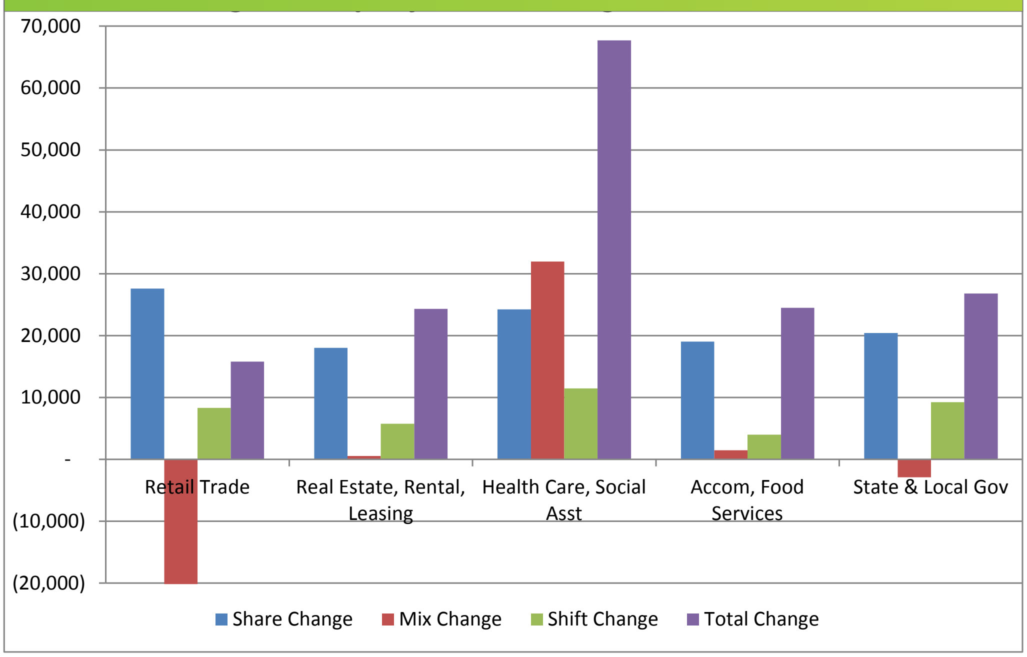
$$e_i^{t+n} - e_i^{t} = share\ change + mix\ change + shift\ change$$

$$e_i^{t+n} - e_i^{t} = e_i^{t}\left[\frac{E^{t+n}}{E^{t}} - 1\right] + e_i^{t}\left[\frac{E_i^{t+n}}{E_i^{t}} - \frac{E^{t+n}}{E^{t}}\right] + e_i^{t}\left[\frac{e_i^{t+n}}{e_i^{t}} - \frac{E_i^{t+n}}{E_i^{t}}\right]$$

a. Share Change - Change of Industry Due to National Growth

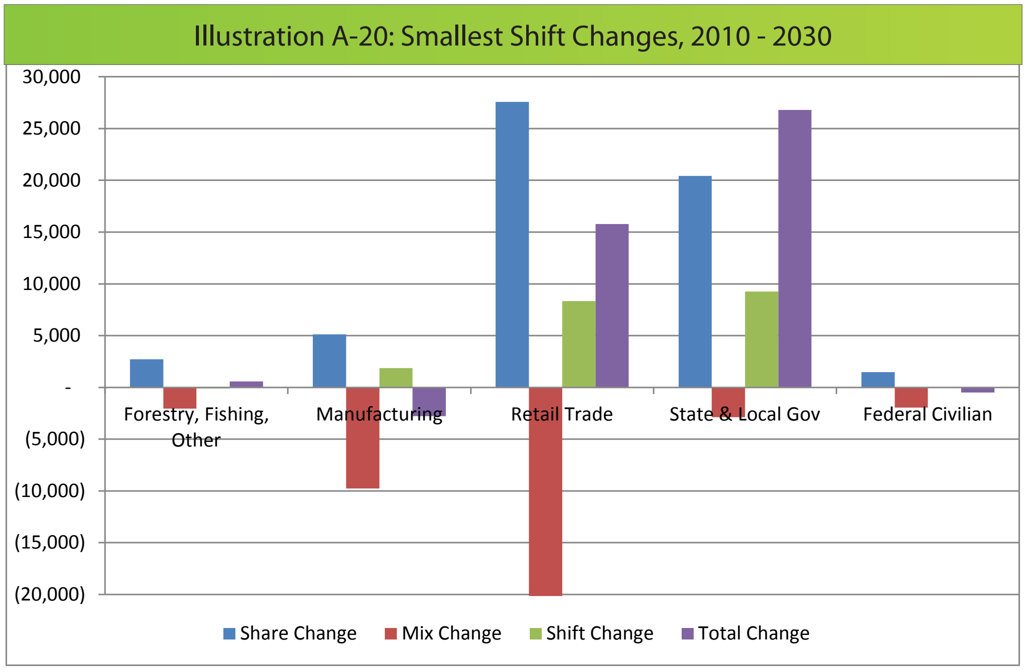
When looking at the extended time period, the biggest total employment changes occur in the Administrative and Support Services, Healthcare Services, Government, Professional/Tech Services, and Food and Drinking places. This is indicated in the illustration below.

Illustration A-19: Largest Employment Changes, 2010 - 2030



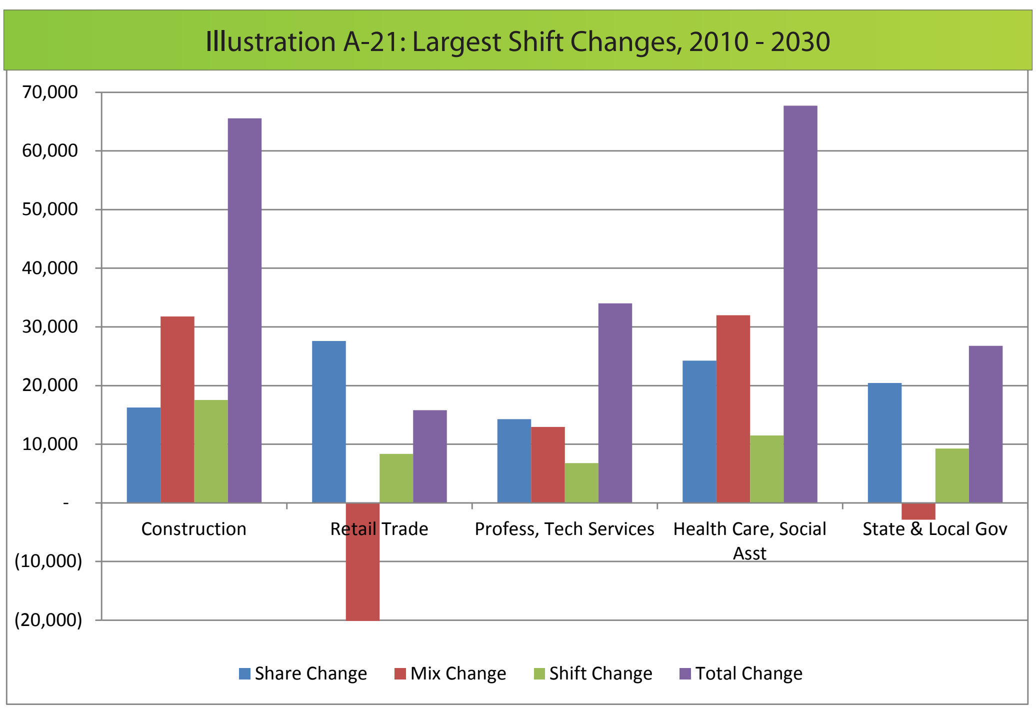
b. Mix Change - Actual Industry Growth

The following chart shows the Smallest Mix Changes 2010-2030, where the region will struggle. The biggest areas are retail trade and manufacturing. The most feasible weakness for the region to focus on would be to increase and attract more manufacturing, allowing it to take advantage of opportunities that may present themselves in the future.



C. Shift Change - Regional Competitiveness

The chart below depicts the largest shift changes in the region over the next two decades.



With the strengthening of the economy in the region more Health Care jobs will be needed. This demand is attributed to a combination of all three trends, industry, nation, and region. Construction will have the next highest amount of demand over the next two decades. Notice the large shift change compared to the negative mix change in Retail trade and Government, signifying consolidations within the industry, however, there is employment growth due to the population growth. Construction and Professional/Technical Services are driven by the anticipated population growth.

d. Location Quotient Analysis

A location quotient and a shift share analyses were performed in order to determine the most important economic clusters in the region. The location quotient and shift share analyses were performed at several different time periods (current, immediate, and future). This will enable the region to show trends and expectations in order to plan accordingly.

A location quotient analysis looks at the concentration of a specific industry in the region compared to the concentration of that same industry in the nation. If the concentration of workers in the specified industry is identical in the region in comparison to the nation, then the location quotient would be 1. If the region was more concentrated then that nation in the specific industry, then the location quotient would be greater than 1. If the region was less concentrated in a specific industry, then the location quotient would be less than 1. The analysis was done with industries along with occupations based on the 70 sector NAICS codes. The location quotient formula is as follows:

Where for the purpose of this cluster analysis:

e_i = regional employment in industry i

e = total regional employment

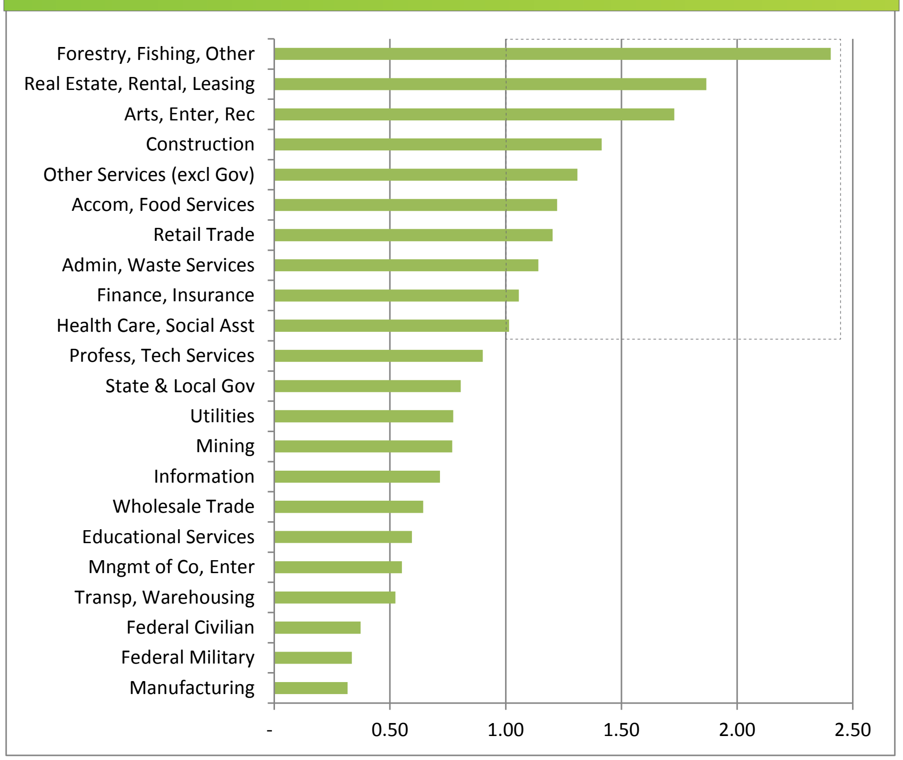
E_i = national employment in industry i

E = total national employment

$$LQ = \frac{e_i / e}{E_i / E}$$

In the analysis of Location Quotients (LQ) for all private sectors, the proportion of regional employment is above average in ten 2-digit NAICS code sectors (illustration xx). The LQs are especially high in Forestry and Fishing, Real Estate and Arts and Entertainment sectors. In addition, the Construction, Accommodation and Food Services, Retail Trade, Adminstration and Waste Services, Finance and Insurance, Health Care and Other Services sectors have shares of the Regional economy above the national average (LQ>1).

Illustration A-22: Location Quotient for Private Sectors in Southwest Florida (2010)



As shown above, the Southwest Florida Region has a very strong concentration of Water Transportation, Administrative and Support Services, and the Manufacturing of Beverage and Tobacco Products, but it is relatively weak in manufacturing, industrial, and mining activities compared to the nation as a whole. The High Tech Corridor, which is larger than the region and encompasses 23 counties across the middle of the state and three state universities, is well represented with high concentrations in internet and telecom employment. The government sectors are all below average indicating efficient local governments.

Analyzing the trends, the majority of the sectors are gradually trending towards the average, which is an indication of the overall Tampa Bay area population growing and employment becoming more diverse.

8. Regional Economic Clusters (Methodology, Identification, Benchmarking)

Definition of Clusters

Business clusters are geographic concentrations of interconnected businesses, suppliers, and associated institutions in a particular field. Clusters are considered to increase the productivity and competitiveness of firms, nationally and globally. The concept of business clusters, also known as competitive clusters, industry clusters, or Porter's clusters, was first developed by Michael Porter in 1990. Cluster development has since become a focus for many government programs. According to Michael Porter, clusters have the potential to affect competition in three ways:

1. By increasing the productivity of the firms in the cluster
2. By driving innovation in the field
3. By stimulating new businesses in the field

Methodology

The data used in this analysis was obtained from Regional Economic Model Incorporated (REMI) Central/Southwest Florida 12 area 23 sector model. The 23 sectors were analyzed using the 2 digit North American industry Classification Systems (NAICS). The two methodologies employed in this analysis are location quotient and shift share.

Table: A Shift-Share Analysis for All Non-Farm Private Sectors in Southwest Florida, 2010-2030

Sectors	Share Change	Mix Change	Shift Change	Total Change
Forestry, Fishing, Other	2,716	(2,041)	(99)	576
Mining	1,087	(744)	(1,093)	(750)
Utilities	587	(1,014)	626	199
Construction	16,241	31,782	17,527	65,549
Manufacturing	5,121	(9,755)	1,860	(2,774)
Wholesale Trade	5,296	(4,855)	1,314	1,755
Retail Trade	27,585	(20,143)	8,341	15,783
Transp, Warehousing	3,809	(435)	293	3,666
Information	2,993	(2,733)	481	741
Finance, Insurance	12,595	(4,349)	1,184	9,431
Real Estate, Rental, Leasing	18,020	571	5,747	24,338
Profess, Tech Services	14,290	12,957	6,762	34,010
Mngmt of Co, Enter	1,436	(1,163)	93	366
Admin, Waste Services	14,843	3,919	(2,245)	16,518
Educational Services	3,135	1,864	694	5,693
Health Care, Social Asst	24,245	31,978	11,484	67,706
Arts, Enter, Rec	8,547	961	(182)	9,327
Accom, Food Services	19,041	1,466	3,980	24,487
Other Services (excl Gov)	16,724	6,005	6,368	29,097
State & Local Gov	20,421	(2,884)	9,250	26,787
Federal Civilian	1,467	(1,964)	(0)	(497)
Federal Military	946	(1,206)	(1)	(261)

9. State and Local Economic Development Plans Affecting the Region

One of the roles of the Southwest Florida Regional Planning Council (SWFRPC) as an Economic Development District (EDD) is to provide assistance to local governments and economic development agencies in securing Economic Development Administration (EDA) funding. SWFRPC staff will work to ensure that viable economic development projects are identified for funding through EDA and also look to other potential funding agencies and programs. SWFRPC will work closely with other agencies and local governments to ensure effective coordination. The SWFRPC reviews plans for consistency with the region's Strategic Regional Policy Plan and the State Comprehensive Plan in the areas of economic and social development. The SWFRPC is participating actively in other local, county, regional, and statewide economic development efforts in order to ensure consistency and cohesion amongst plans. In an effort to provide this consistency, the SWFRPC is adopting the Florida Chamber's Six Pillars framework for its CEDS as well as the other economic development activities in which it engages.

The SWFRPC is involved in many efforts which coordinate within the state of Florida or within the region. These include: the state's economic development agencies Enterprise Florida and Department of Economic Opportunity (DEO), Florida Regional Planning Councils Association (FRCA); the Florida Regional Economic Development Initiative (FHREDI); as well as local economic development councils. The SWFRPC has a working partnership with the region's major colleges and universities. Transportation is one of the key issues with the Southwest Florida EDD. Development of a balanced system of existing road network and developing future transportation corridors for movement of goods and people requires ongoing coordination with the Florida Department of Transportation (FDOT, District One) and with local governments. SWFRPC staff serves on both the Lee County Metropolitan Planning Organization (MPO)'s Technical Advisory Committee.

The SWFRPC will continue to work with key economic development partners in local communities and at the regional and state level to move forward existing plans for economic diversification and responsible development. The regions for rural counties are defined by the State as a Rural Area of Regional Economic Concern, a designation which carries planning resources and incentives.

As part of the ongoing coordination of economic development activities in the region, the SWFRPC participates in the alignment of other economic development planning initiatives. Enterprise Florida and the Department of Economic Opportunity initiate statewide efforts as well as support initiatives to generate employment into all areas of the state including the Southwest Florida EDD. County and city economic development strategies are considered, as well as regional initiatives and plans such as FHREDI's Marketing Plan, Regional Workforce Plans, and the Central Florida Regional Planning Council's CEDS (as Hendry and Glades Counties are part of the Heartland 2060 Vision).

Other plans that are analyzed as part of the CEDS planning and process include:

- Southwest Florida Regional Planning Council Strategic Regional Policy Plan; adopted June 1, 1997.
- New Cornerstone- A Vision for Florida's Economic Future; prepared for the Florida Chamber Foundation, 2003, Research by Cambridge Systematics, Inc.
- Rural Area of Critical Economic Concern Catalyst Project for South Central Florida, Target Industry Report; April 2007
- Roadmap to Florida's Future; Enterprise Florida 2010-2015
- Florida's 2011-2012 Workforce Investment Act Plan Modification
- Statewide Strategic Plan for Economic Development: Rural Priority, 2006-2008; Enterprise Florida, Inc. (To be finalized 7.13.12)
- Florida Five Year Statewide Strategic Plan, 2012; Florida Department of Economic
- Airports - Florida Statewide Aviation Economic Impact: http://www.dot.state.fl.us/aviation/economicimpact.shtm
- Florida's Freight Mobility and Trade Plan, http://www.freightmovesflorida.com/home.aspx

10. Past, Present, and Projected Future Economic Development Investments

a. Recent Economic Development Investments

2012 – Renewable Energy and Research Diamond - Lee County - $551, 000

The Council worked closely with Lee County to prepare a successful application for assistance from the U.S. Department of Commerce, Economic Development Administration (EDA). The County received $551,000 to support the preliminary design, modeling, and permitting of wastewater and infrastructure improvements to serve the region's Renewable Energy and Research Diamond. The project is expected to create 1,500 new jobs and attract more than $10 million in private investment.

b. Current Economic Development Investments

- **Statewide Energy Resiliency Strategy** - The Council will be assisting the TBRPC in the development of a Statewide Energy Resiliency Strategy in partnership with the State's Economic Development Districts. For this project, the Regional Planning Councils were divided into five Energy Planning Partnerships; this region was partnered with Central Florida Regional Planning Council. This project entails, surveys, regional submit(s) and a final report. This project will be completed by February 2013.

- **Broadband Florida - Broadband SW Florida** - The Florida Local/Regional Broadband Planning Project is a two-year collaborative effort among the Tampa Bay, Central Florida, and Southwest Florida Regional Planning Councils and the Florida Department of Management Services. Funding for this project was provided by the National Telecommunications and Information Administration's Broadband Technology Opportunities Program. Broadband is vital for economic growth, both by fostering new industries and expanding opportunities for existing businesses. The Florida Local/Regional Broadband Planning Project addresses the need to develop broadband planning capabilities by developing a structured, comprehensive process for creating local and regional broadband plans. A planning toolkit and training materials are being developed to provide guidance in the process of developing a comprehensive broadband plan. The planning toolkit and training materials will be tested by developing a regional broadband plan for each of two pilot areas in Florida. By using the tools, training, and process framework created by this project, other communities and regions can replicate and expedite the process of improving broadband capabilities as resources and funding become available.

- **Brownfields Program** - The Council staff continues to work towards the creation of a regional program that will help local governments conduct environmental site assessment and/or cleanup activities on petroleum-contaminated Brownfield sites.

c. Anticipated Economic Development Investments

- Mote Marine
- Charlotte County Incubator

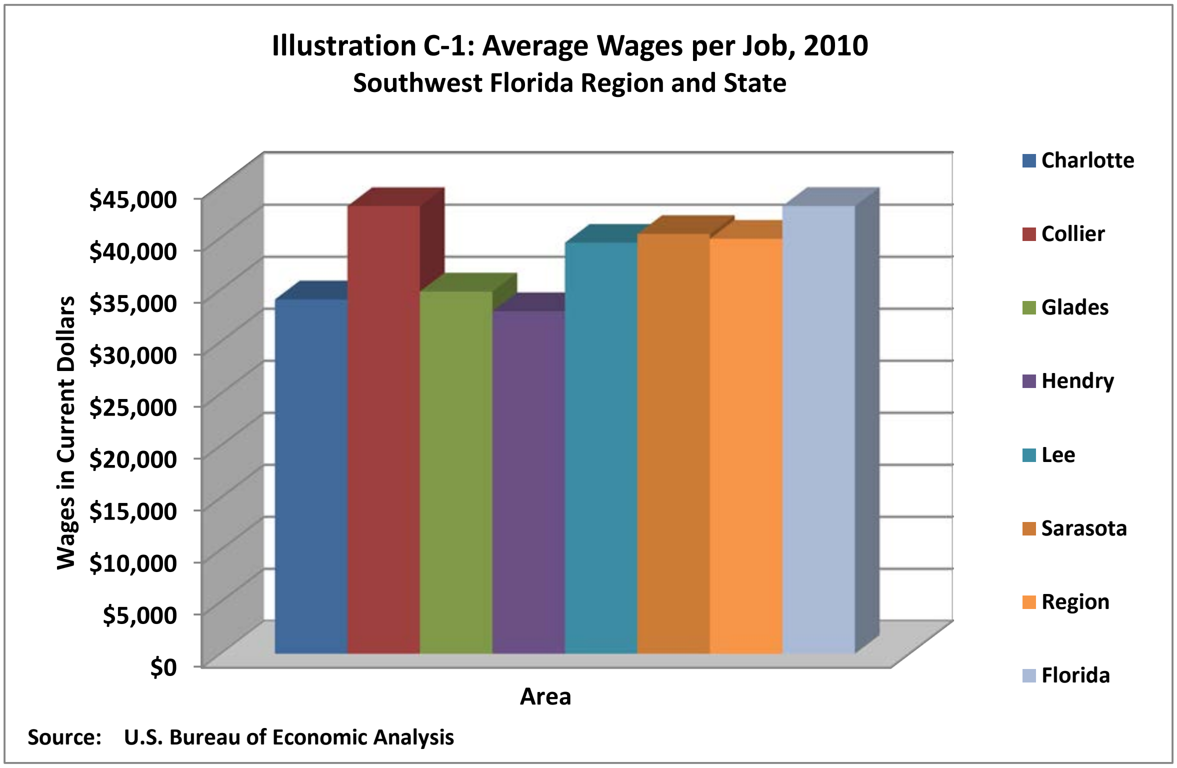
B. Performance Measures

1. **Number of Jobs Created After Implementation of the Comprehensive Economic Development Strategy**
    a. Total Employment in Initial Year
    b. Total Employment in Subsequent Years
2. **Number and Types of Public Sector Investments Undertaken in the Region**
    a. EDA Sponsored Investments
    b. **Significant State and Local Investments**
3. **Number of Jobs Retained in the Region**
    a. Number of Jobs Retained as a Result of Federal Investments
    b. **Number of Jobs Retained as a Result of Select State and Local Investments**
4. **Amount of Private Sector Investment in the Region After Implementation of the Comprehensive Economic Development Strategy**
5. **Changes in the Economic Environment of the Region (Changes to Taxes & Fees, New Incentive Programs, etc.)**

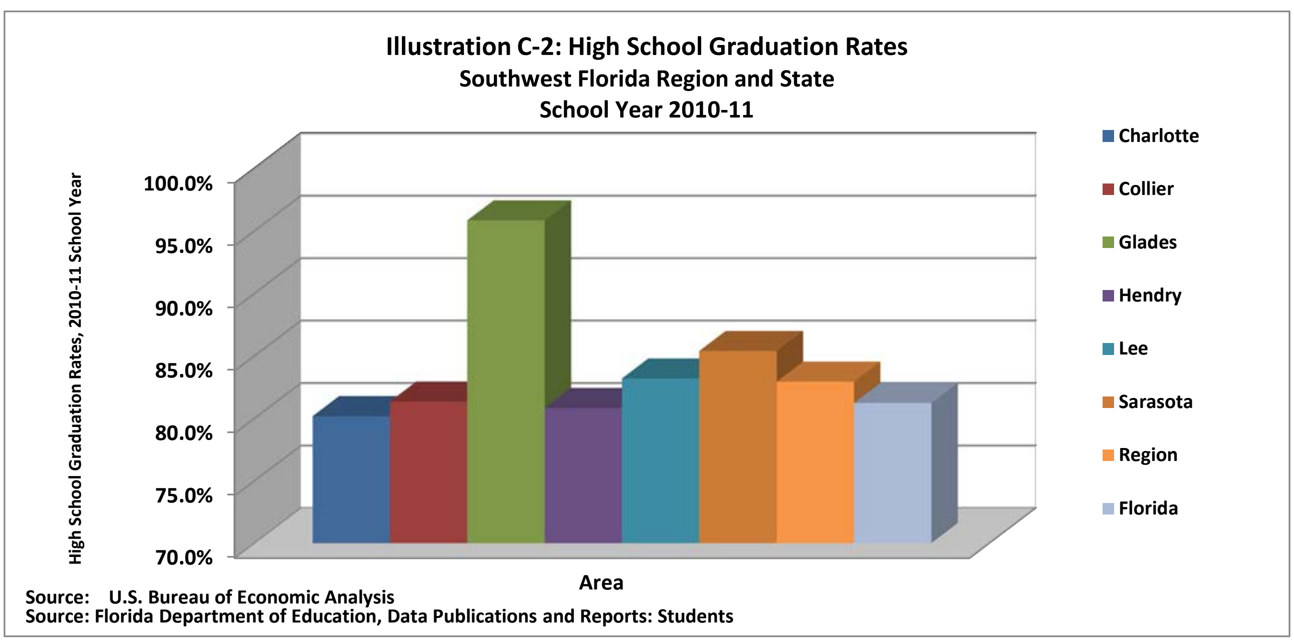
C. Six Pillars Measures

1. Talent Supply & Education

a. Average Annual Wage

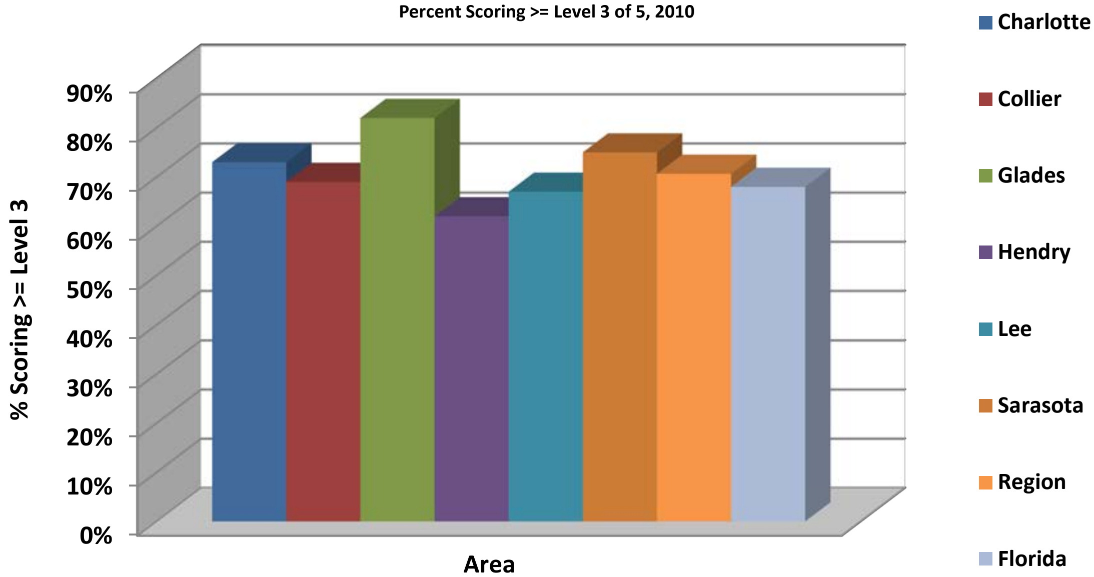


b. High School Graduation Rates



a. 8th Grade Math Performance

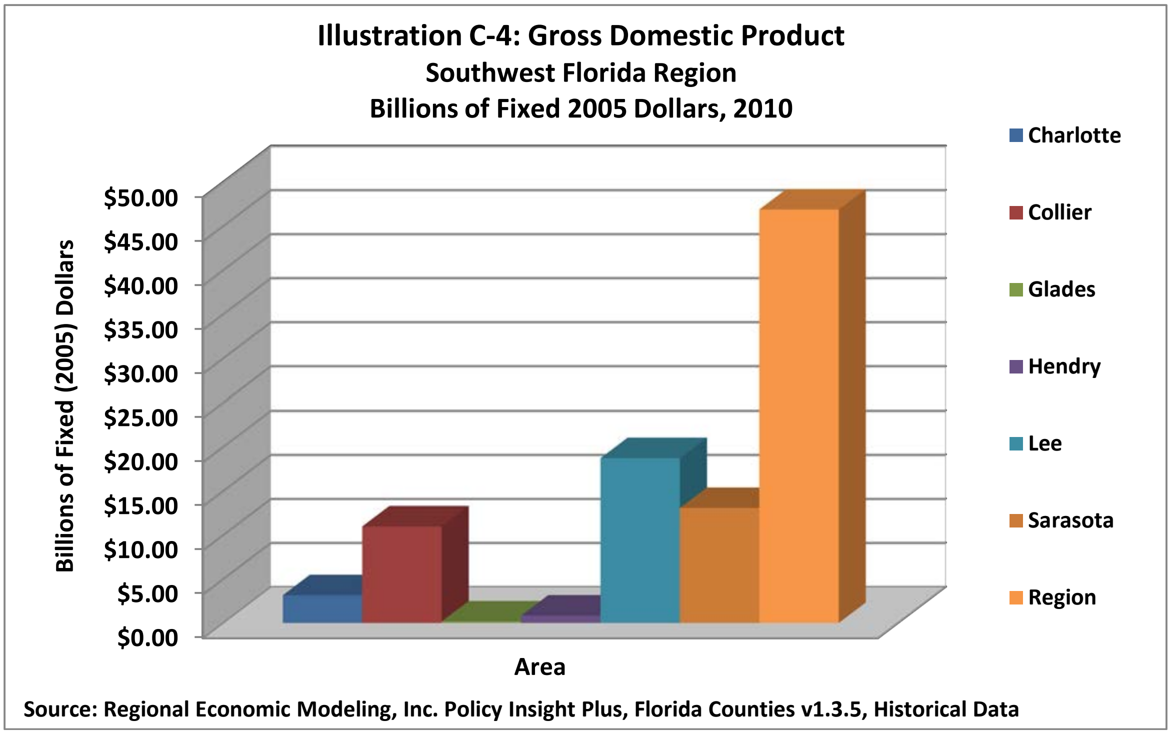
Illustration C-3: 8th Grade Math Performance
Southwest Florida Region and State
Percent Scoring >= Level 3 of 5, 2010



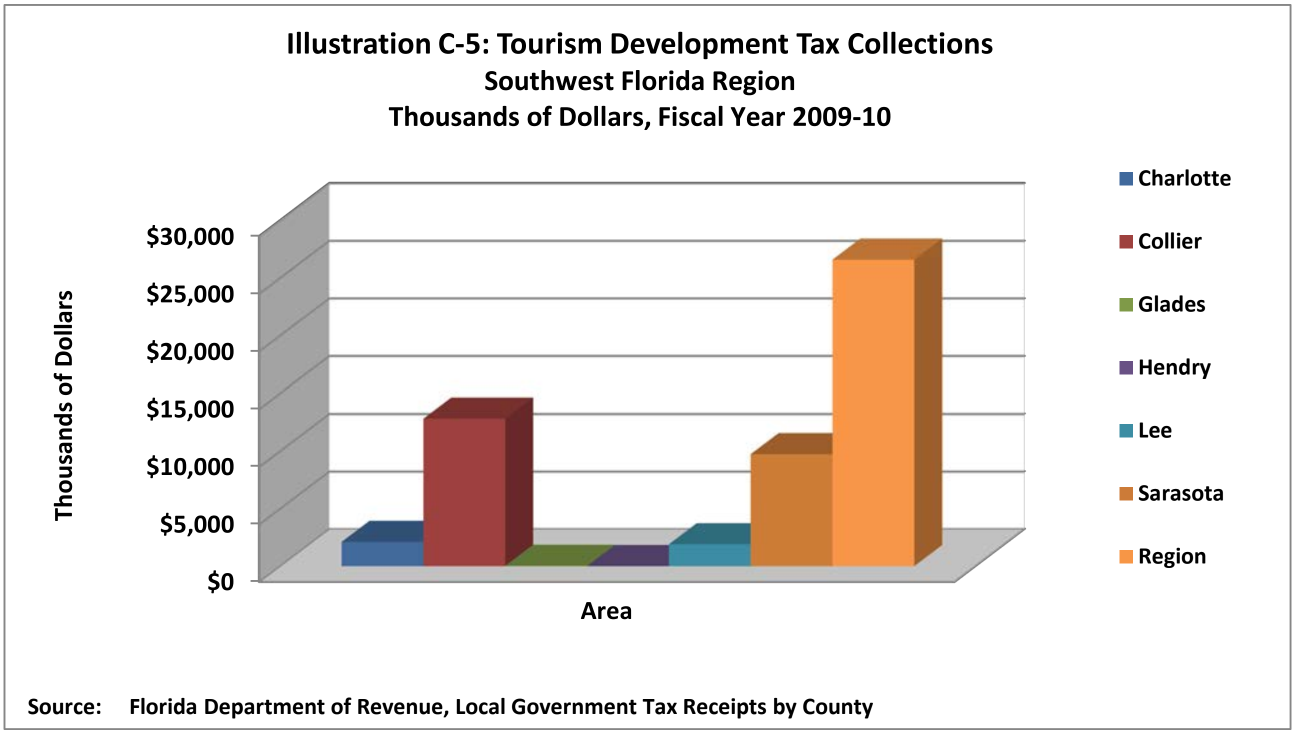
Source: Florida Department of Education, Florida Comprehensive Assessment Test

2. Innovation & Economic Development

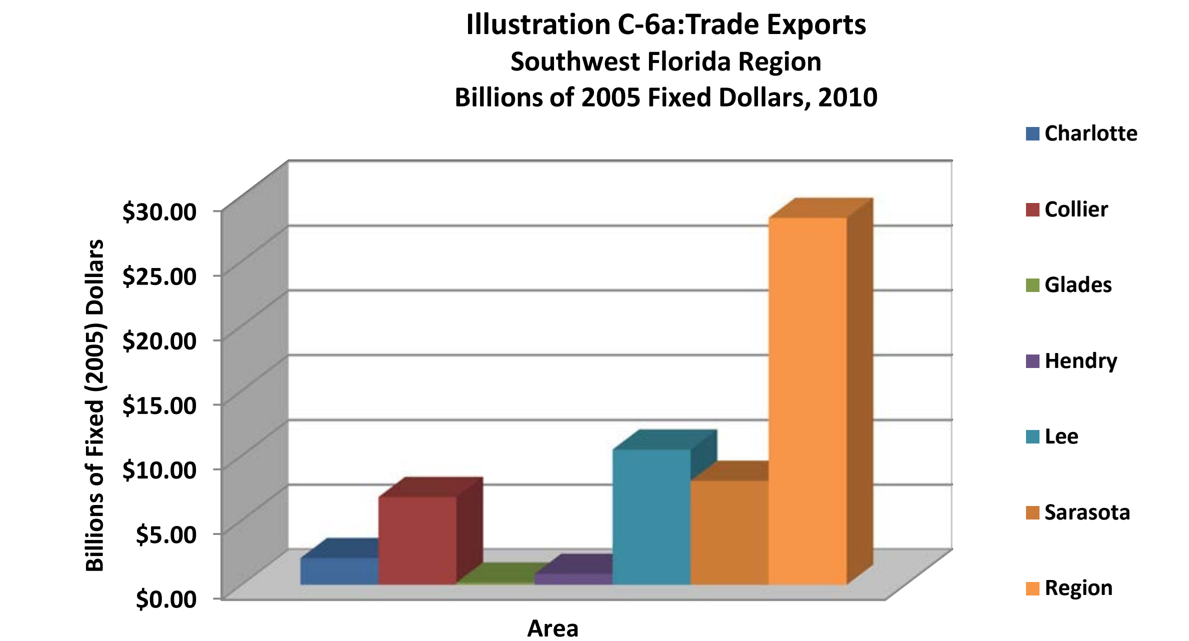
a. Gross Domestic Product



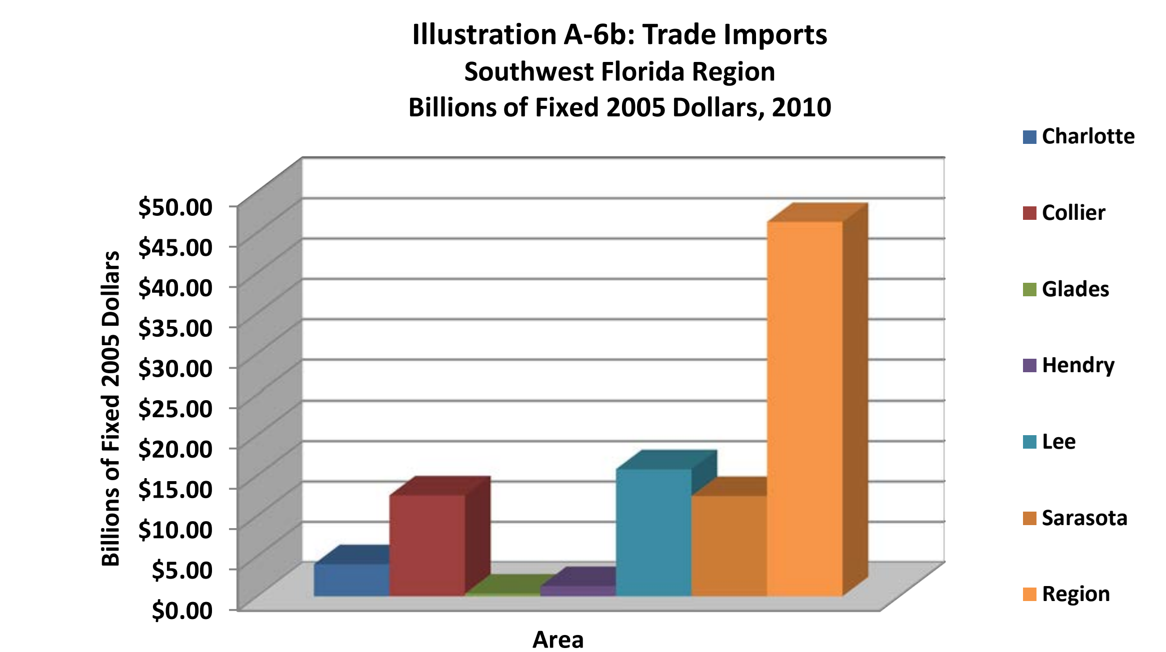
b. Bed Tax Collections



a. Trade Exports and Imports



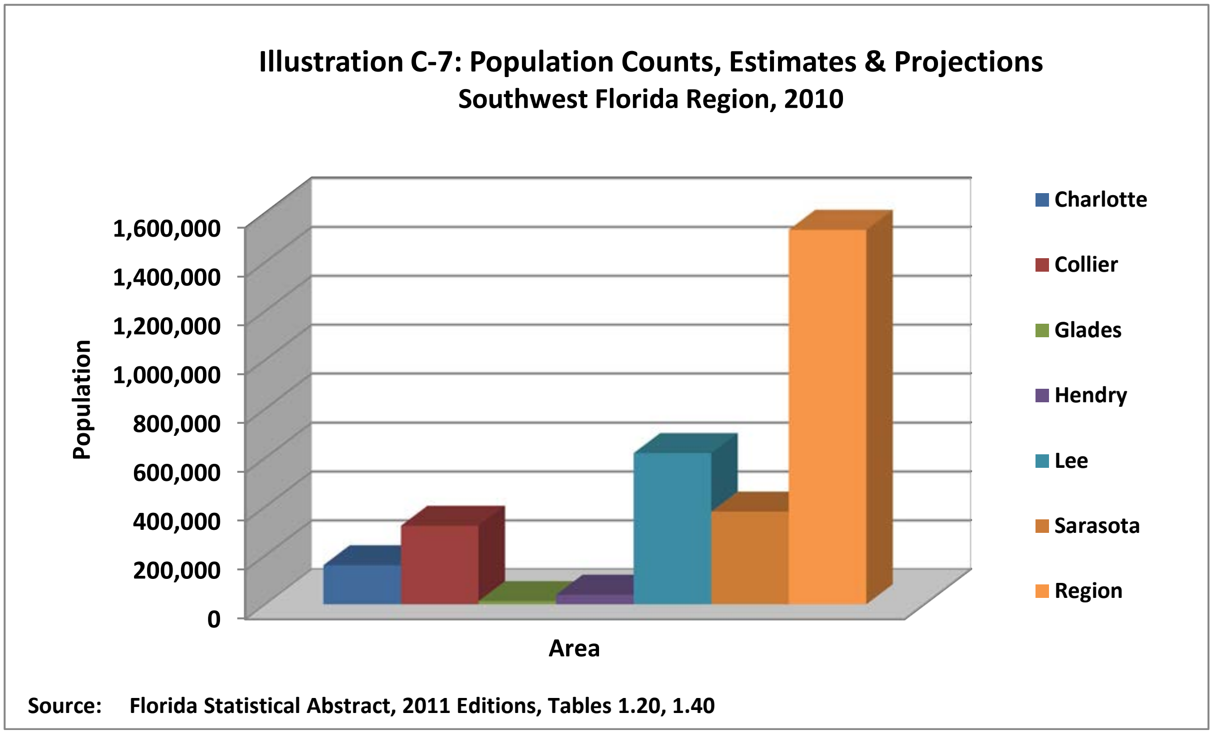
Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical



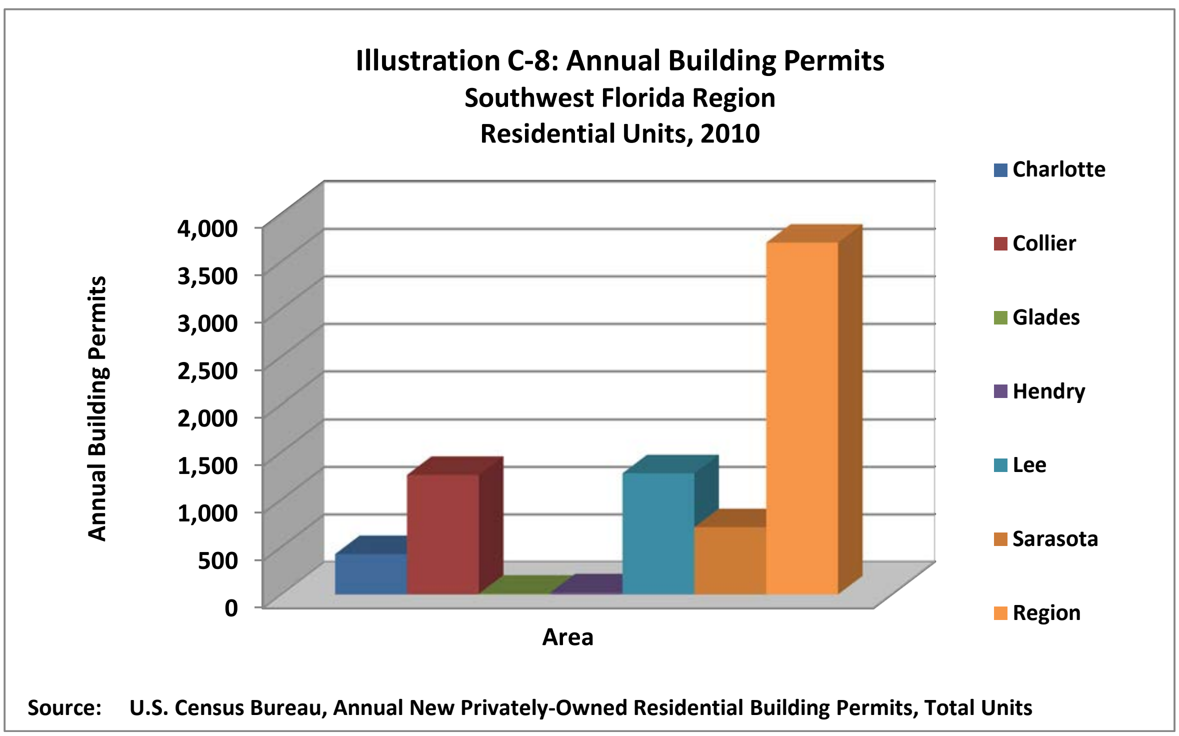
Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

3. Infrastructure & Growth Leadership

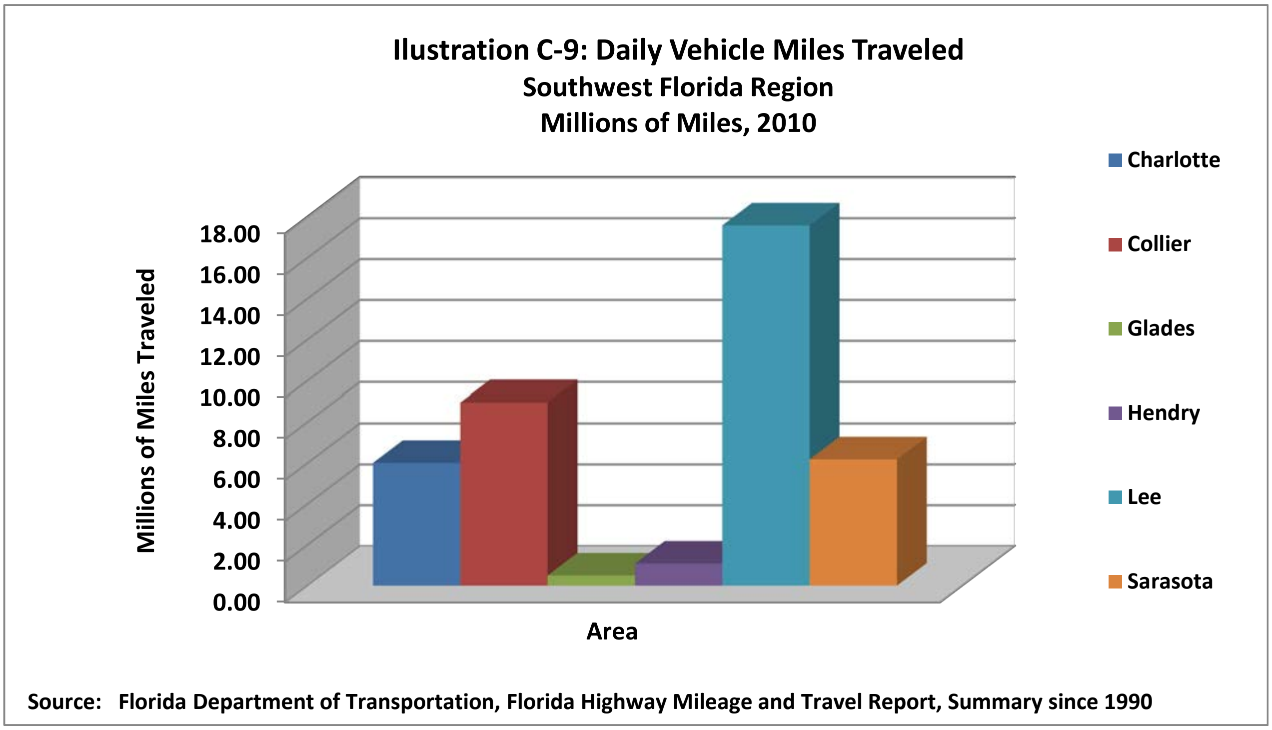
a. Population Counts, Estimates and Projections



b. Building Permits

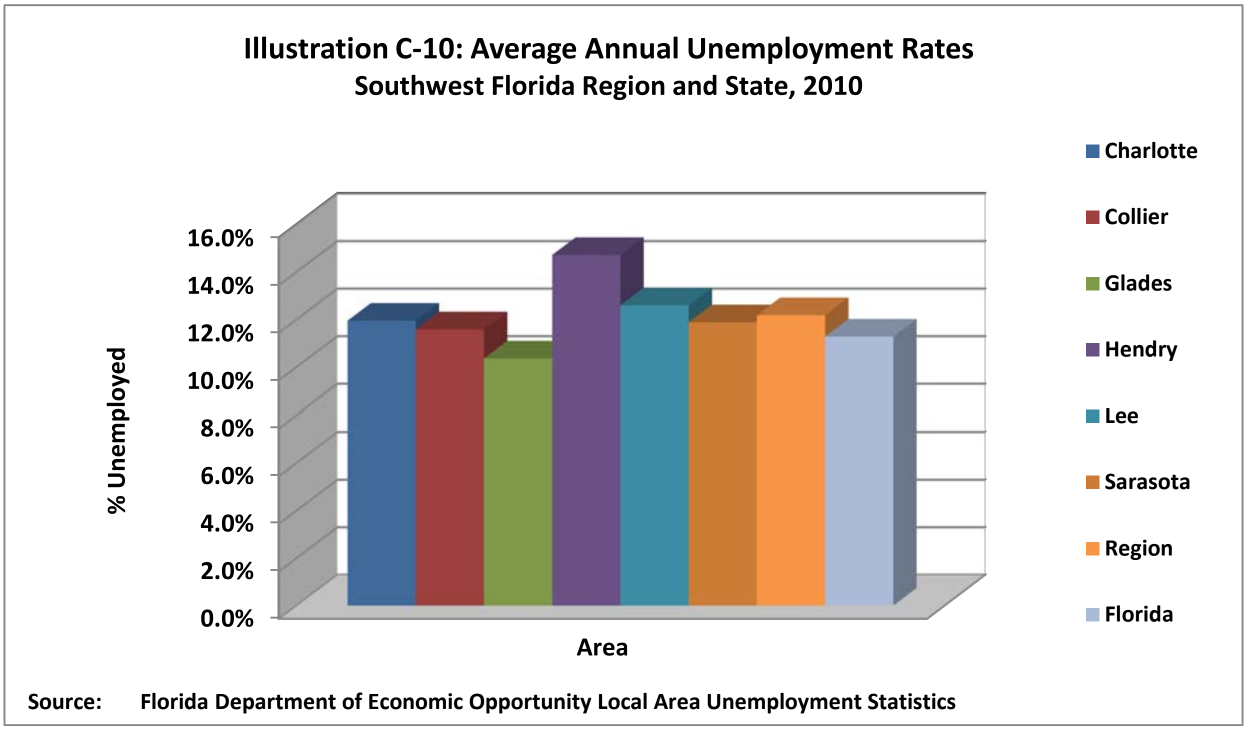


a. Vehicle Miles Traveled

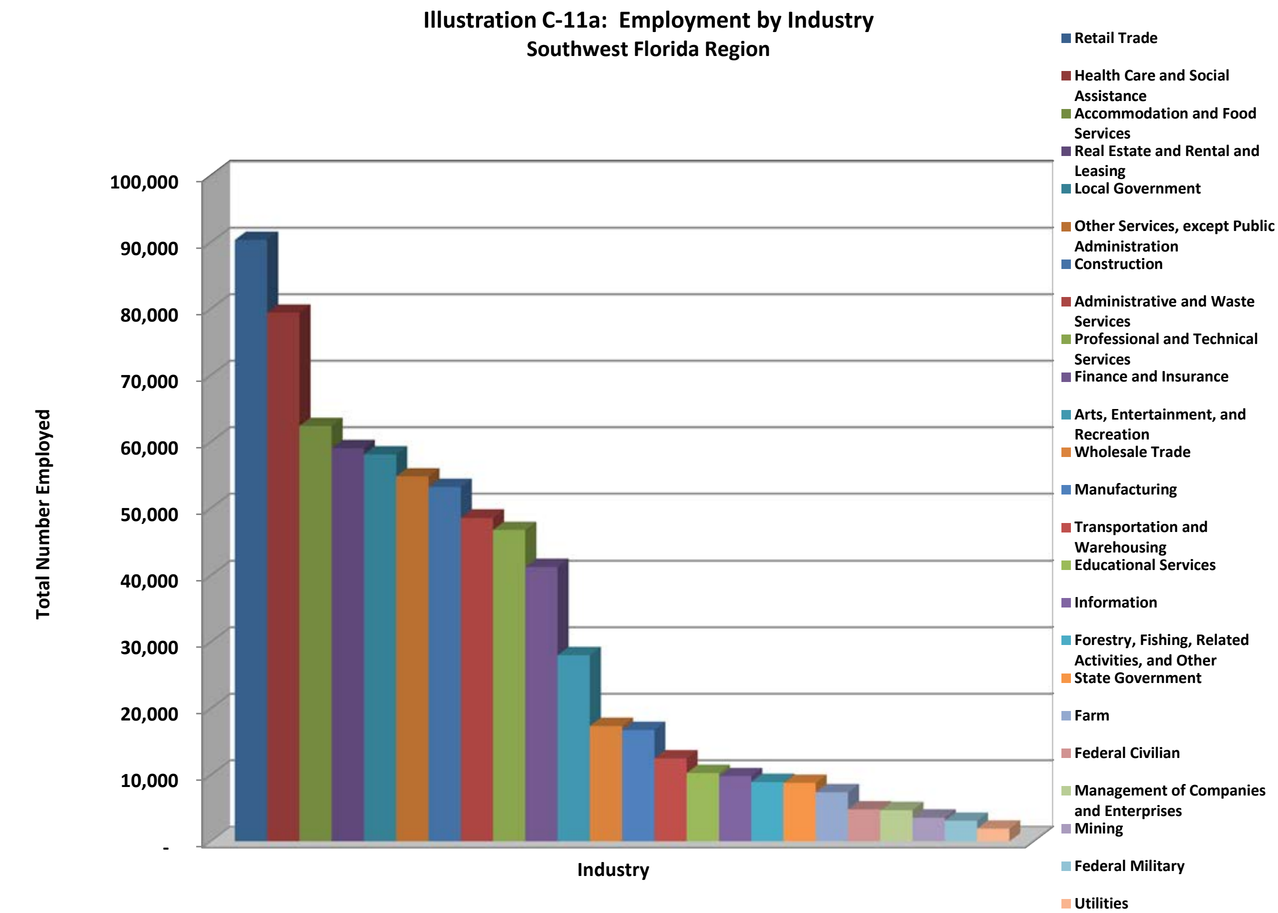


4. Business Climate & Competitiveness

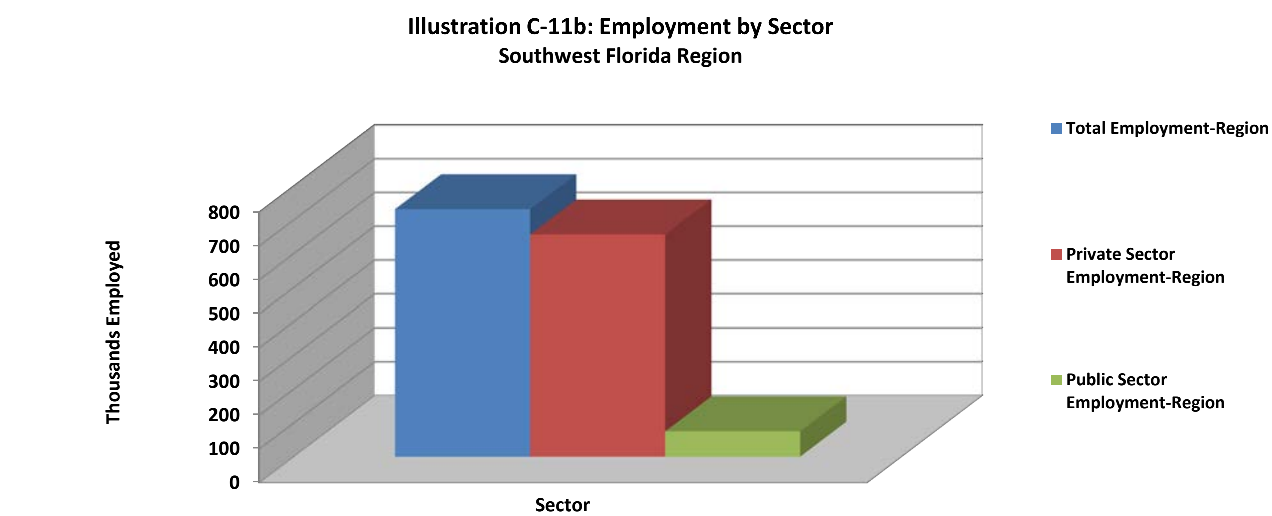
a. Average Annual Unemployment Rates



a. Employment by Industry

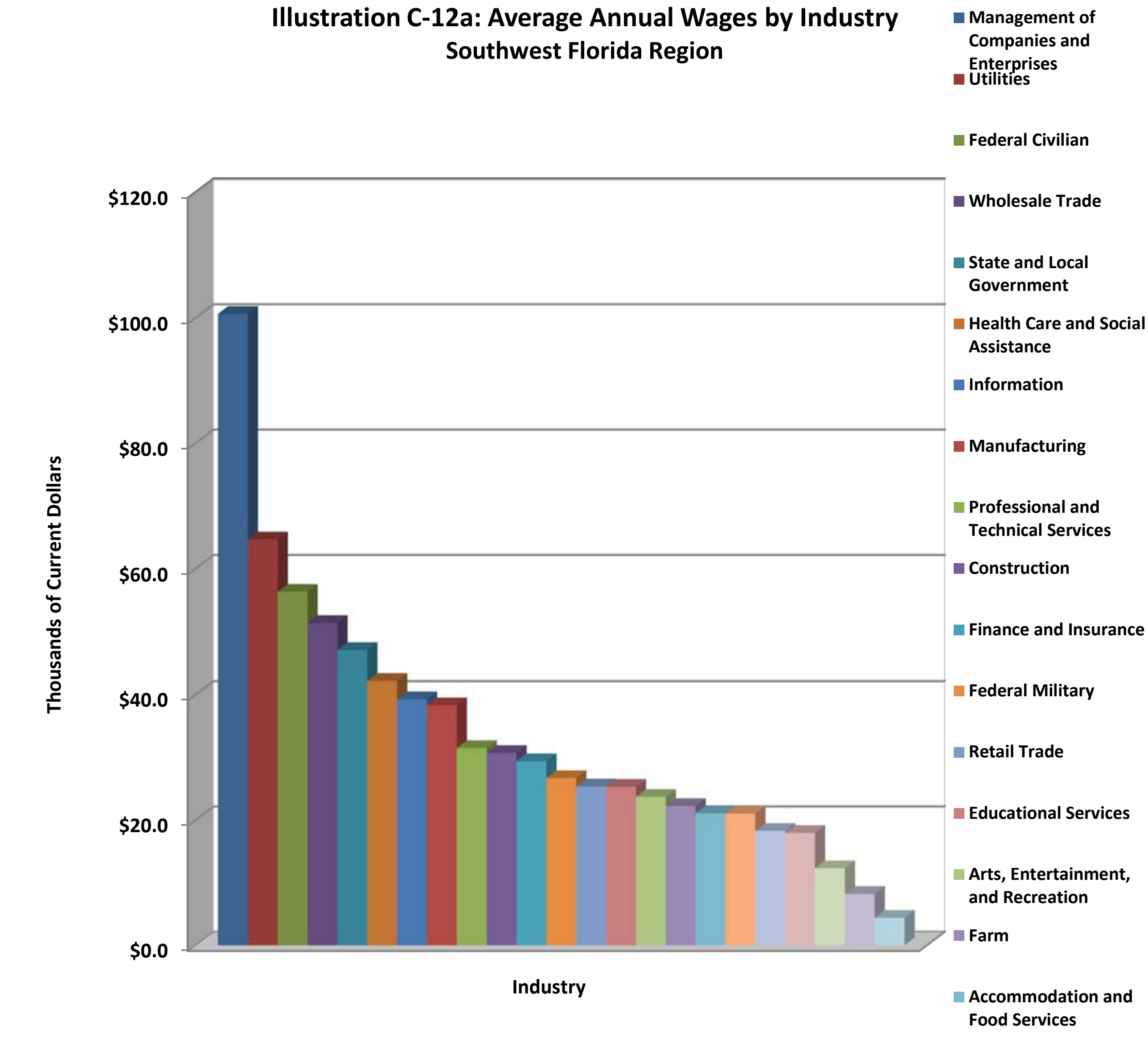


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

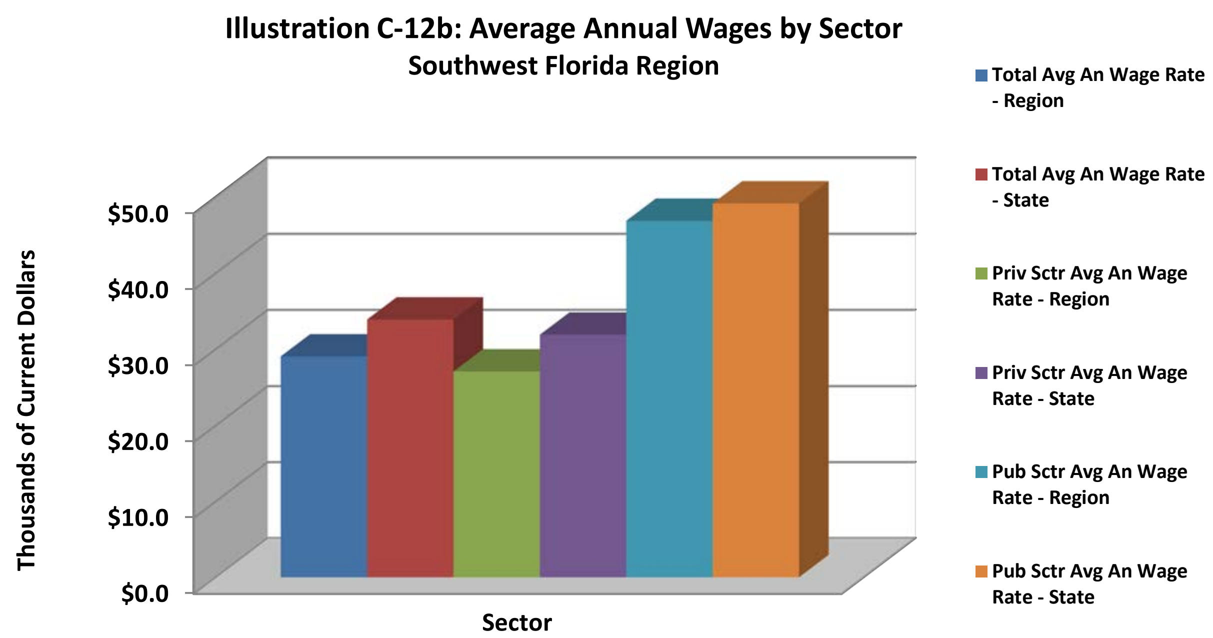


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

a. Wages by Industry



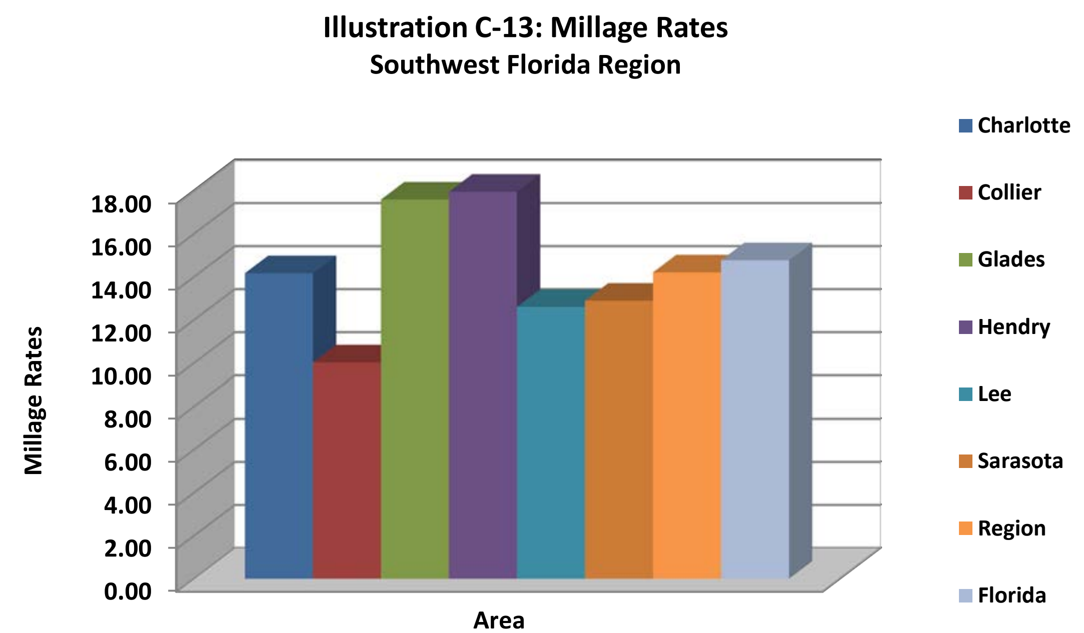
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

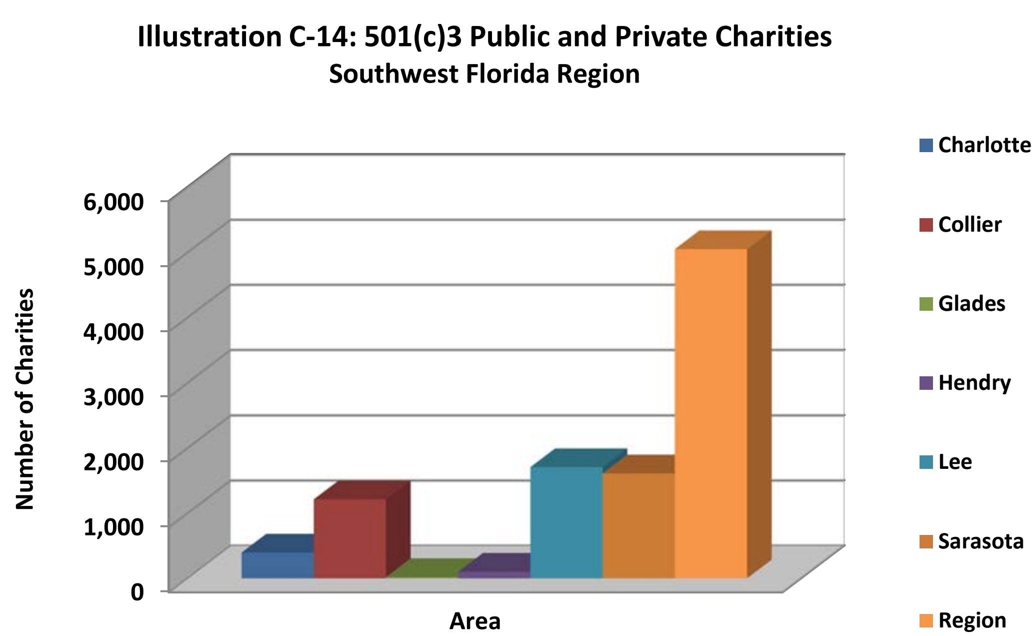
5. Civic & Governance Systems

a. Millage Rates



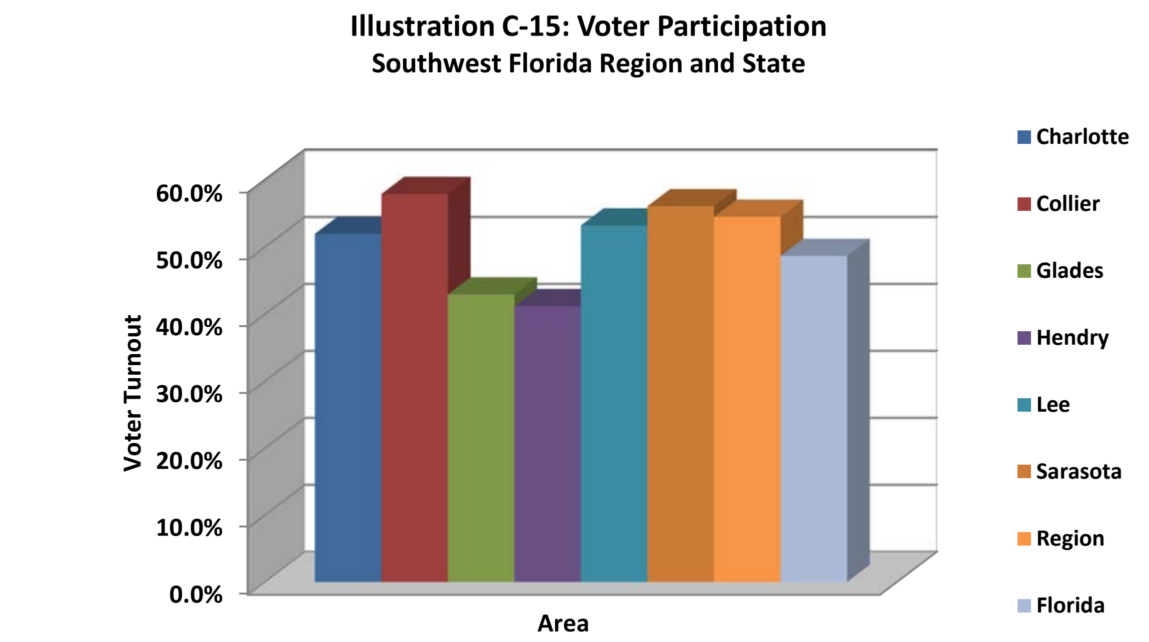
Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations



Source: The Urban Institute, National Center for Charitable Statistics

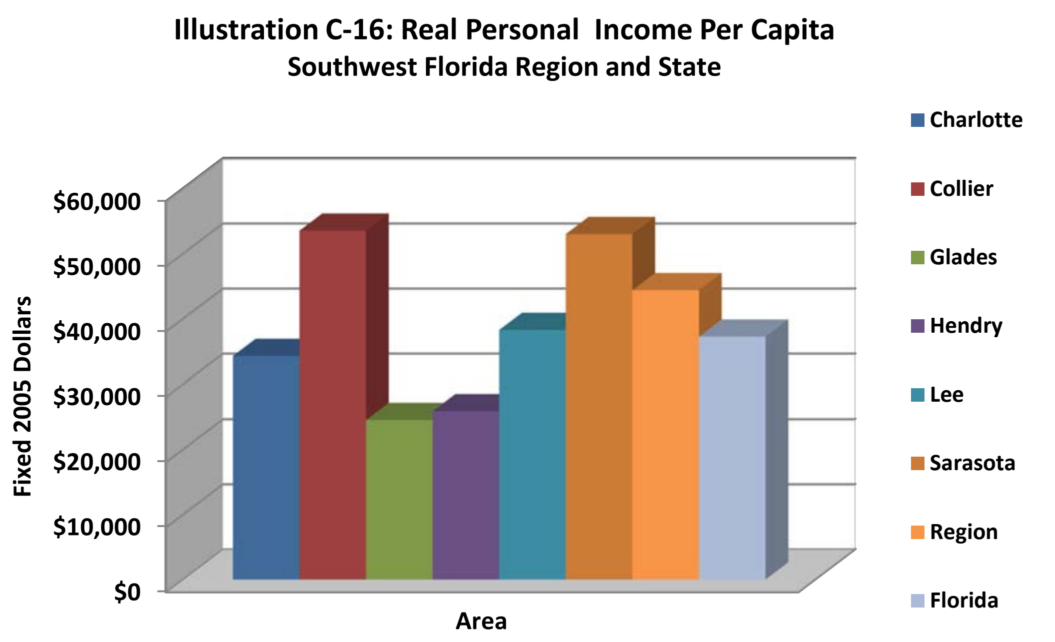
a. Voter Participation



Source: Florida Department of State, Division of Elections

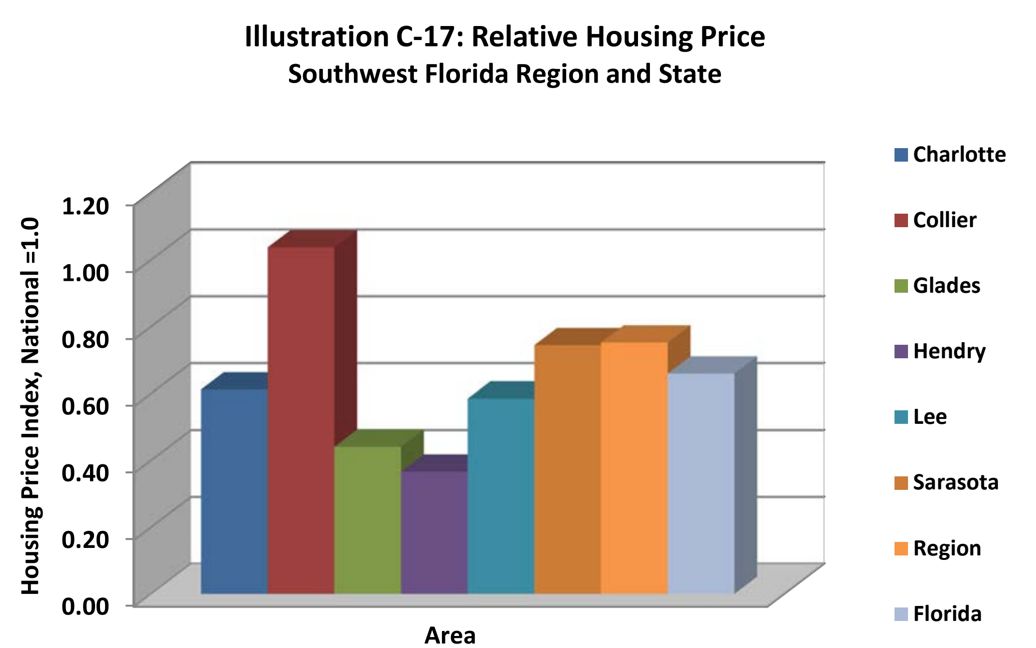
6. Quality of Life & Quality Places

a. Per Capita Income



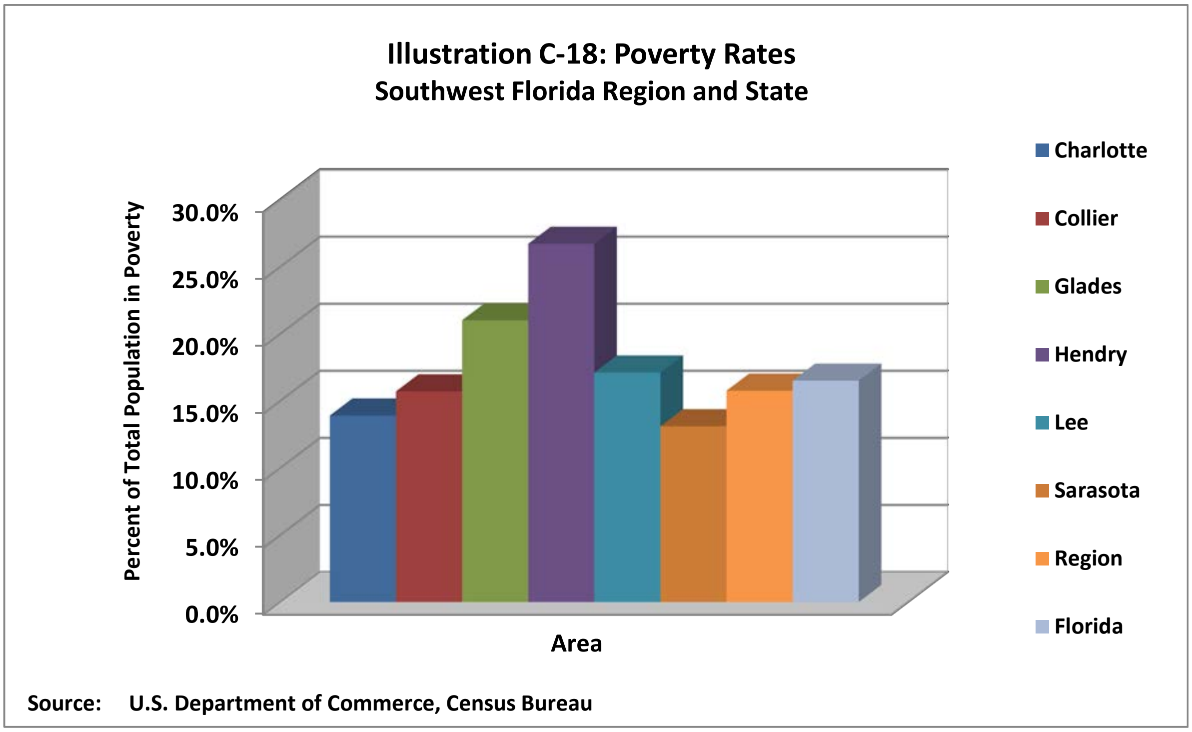
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

b. House Purchase Price and Cost Index



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

a. Persons Living in Poverty



SOUTHWEST FLORIDA REGIONAL PLANNING COUNCIL

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