Northeast Florida Regional Council

"Bringing Communities Together to Advance the Regional Agenda."

Comprehensive Economic Development Strategy

REPORT 2014-2019

Northeast Florida Regional Council

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Northeast Florida Overview

Northeast Florida, the Region, is comprised of seven counties—Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns Counties—and 27 municipalities. The Region's land area covers a total of 4,428 square miles, with 5.8 percent dedicated to agriculture, 2.1 percent to industry and commercial use, and 14.1 percent to urban use. The total population for the Region is 1,542,449 (Bureau of Economic & Business Research, 2013 Population Estimate). Fifteen of the 27 municipalities have a population of less than 5,000 residents. The remaining municipalities are mid-sized, with populations around 10,000. The two largest cities in the Region after Jacksonville (832,993) are Palm Coast (77,068) in Flagler County and Jacksonville Beach (21,713) in Duval County.

The Region is situated between the Atlantic Ocean and the St. Johns River with 140 miles of coastline and five barrier islands. Four of the seven counties are coastal communities; from north to south, these four counties are Nassau County, Duval County, St. Johns County, and Flagler County. The St. Johns River, over 300 miles in total length, is the longest river in the State of Florida and extends throughout the Region. The St. Johns River is one of 14 American Heritage Rivers. Together, these water bodies are a strategic advantage for the Region as they are the foundation for both international trade and the multimodal movement of freight.

Economy

Income

Within the Region, the median household income (total income of all persons in the household) increased from 2004 to 2012. The 2004 median household income ranged from a low of $33,442 (Putnam County) to a high of $61,859 (St. Johns County). The 2012 median household incomes ranged from $34,429 (Putnam County) to $64,346 (St. Johns County).

- In 2004, median household income in Florida was $40,900.
- In 2012, the median household income in Florida was $46,971.
- The regional median household income in 2004 was $45,430.
- In 2012, regional median household income was $51,396.

Within the Region, the total earned income by industry increased from 2006 to 2012.

- In 2012, earned income by employment sector increased by $4.5 billion to a total of $32 billion.
- Total earned income within the Health Care Sector increased by $1.6 billion.
- This sector is followed by an increase in total earned income in Finance by $860 million.
- Sector decreases: Construction and Real Estate.
- Sector increases: Health Care, Finance, Information, Arts, Educational Services, Transportation, & Wholesale Trade.

The US Bureau of Economic Analysis estimates the average annual wages by job. This indicator reflects the influence of education as increases in wages are linked to a higher skilled talent supply.

- Average Annual Wages per job have increased since 2001.
- In 2001, the Region's Average Annual Wage per job was $27,068.
- In 2011, The Region's Average Annual Wage per job was $38,364.

Exhibit 1 – Earned Income by Employment Sector Comparison: 2006 vs 2011

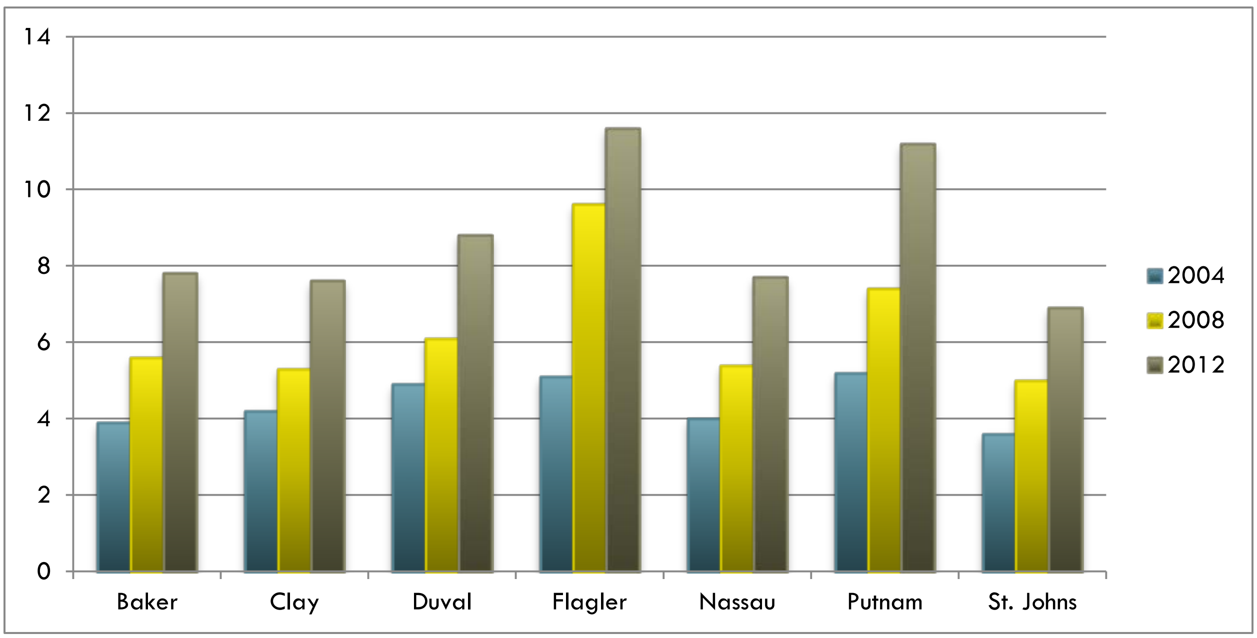
Sector	Earned Income 2006	Earned Income 2011	Sector	Earned Income 2006	Earned Income 2011
Construction	$2.8 billion	$1.81 billion	**Manufacturing**	$2.3 billion	$2.3 billion
Wholesale Trade	$1.9 billion	$2.07 billion	**Retail Trade**	$2.7 billion	$2.85 billion
Transportation	$1.7 billion	$2.04 billion	**Information**	$861 million	$1.14 billion
Finance	$3.7 billion	$4.56 billion	**Real Estate**	$961 million	$711 million
Professional Services	$2.6 billion	$3.18 billion	**Management**	$563 million	$671 million
Administrative Services	$1.8 billion	$2.29 billion	**Health Care**	$3.4 billion	$5.07 billion
Educational Services	$263 million	$447 million	**Arts**	$399 million	$599 million
Accommodation	$1.1 billion	$1.4 billion	**Other Services**	$1.1 billion	$1.56 billion
TOTAL	$15,863,000,000	$17,797,000,000	**TOTAL**	$12,284,000,000	$14,901,000,000

Source: BEBR, University of Florida, 2006 & 2011

Employment

Northeast Florida had a labor force (civilian persons 16 years and greater) of 729,873 in 2007, which was approximately 8% of Florida's 9.3 million-person labor force. In 2012, the Region had a labor force of 762,687, maintaining the 8% segment of Florida's 9.2 million-person labor force.[1] Exhibit 2 shows the unemployment rates for the seven counties in the Region. All have experienced substantial increases in their unemployment rates with the largest increase occurring in Flagler and Putnam County.

Exhibit 2 – Unemployment Rate Comparison – 2004, 2008, 2012



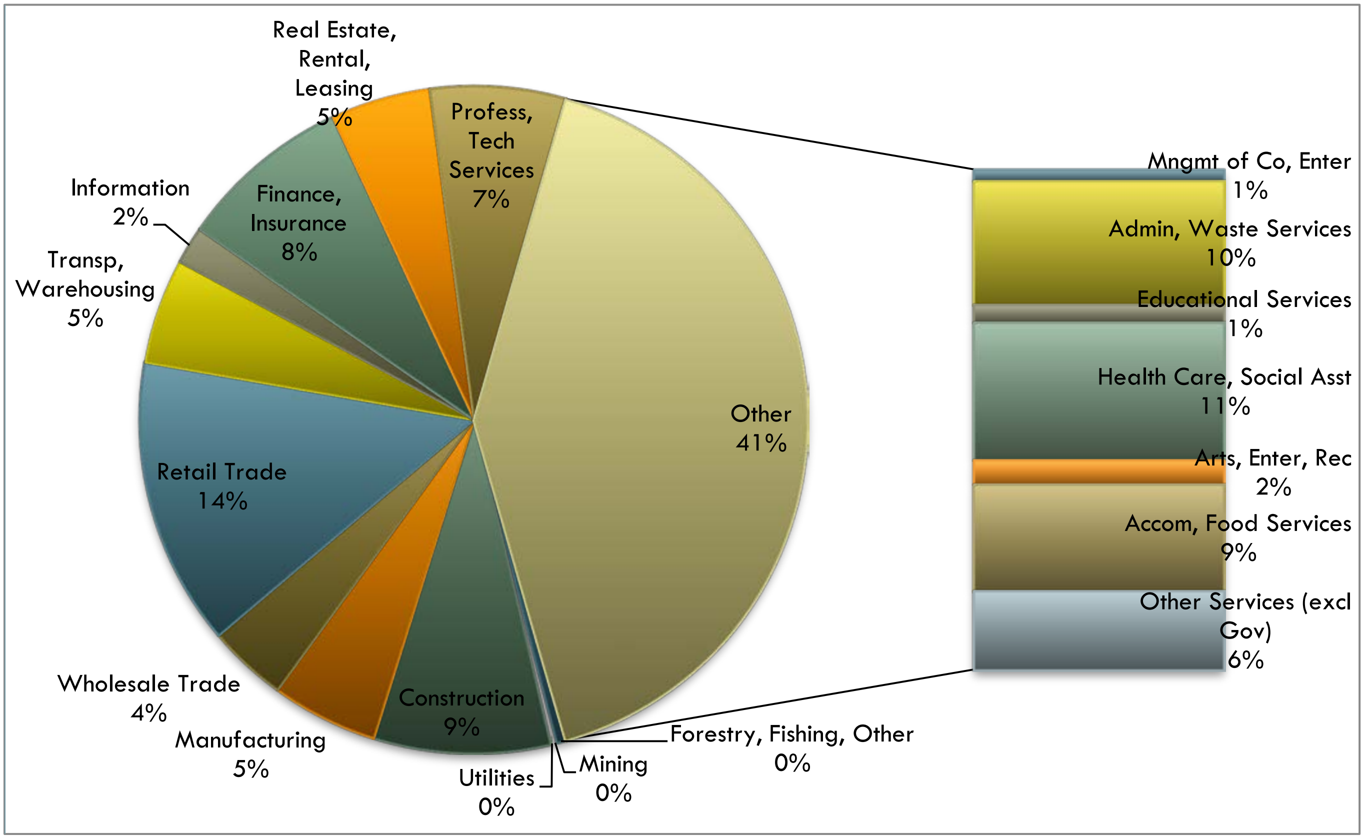
Source: BEBR, University of Florida

[1] US Bureau of Labor Statistics (www.bls.gov)

Regional Industries

The 2008 Region's three largest private sectors by employment (in 2-digit NAICS codes) were Retail Trade, Health Care and Social Areas, and Administrative and Support and Waste Service. Together with Construction, Accommodations and Food Service, and Finance and Insurance, they account for 61 percent of regional employment.

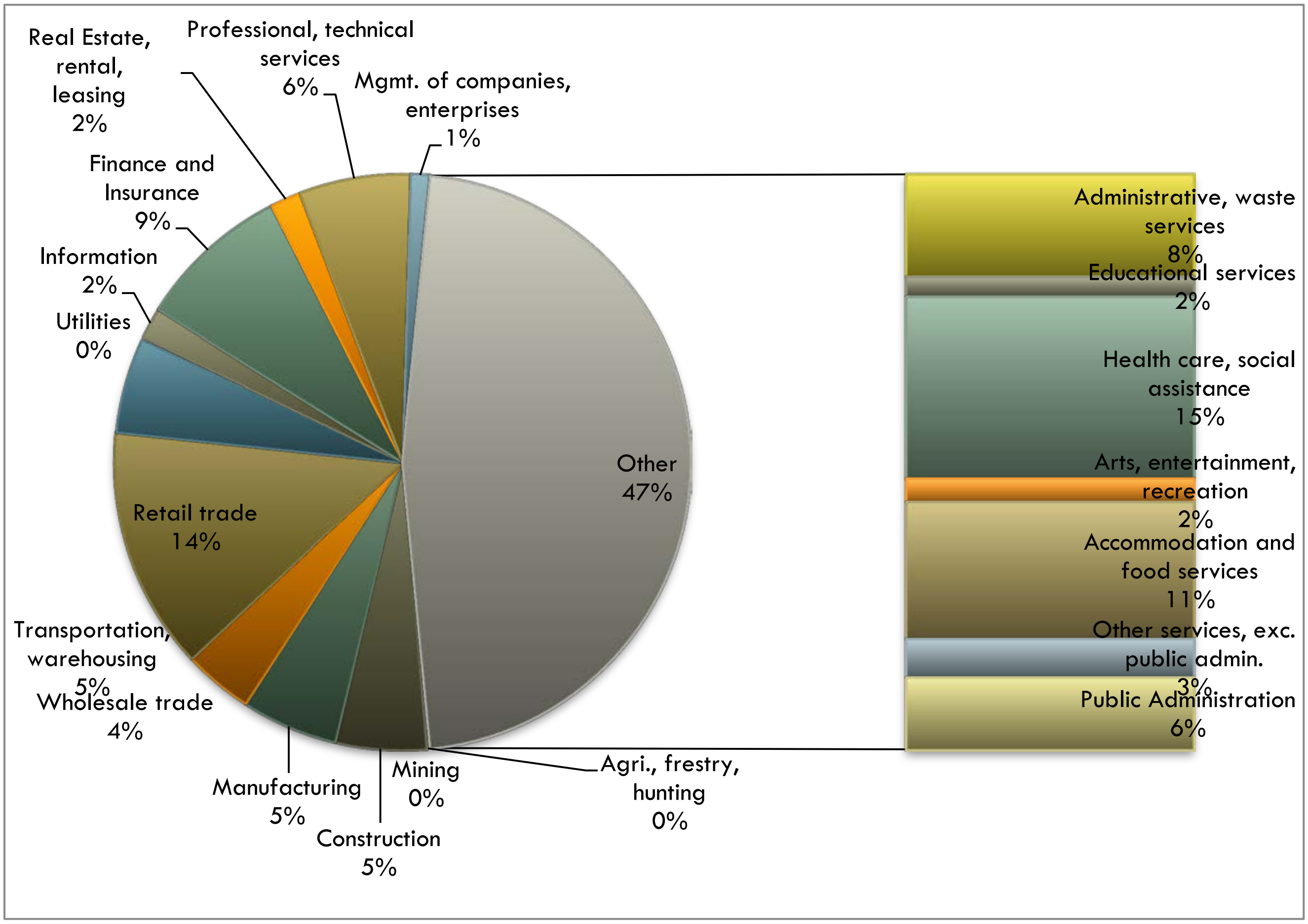
Exhibit 3 – Industry Distribution of Jobs in 2008



Source: US Bureau of Labor Statistics

- 2008 Leading Sectors by # of Jobs: Retail Trade (14%), Health Care (11%), Administrative, Waste Service (10%)

Exhibit 4 – Industry Distribution of Jobs in 2012



Source: US Bureau of Labor Statistics

- 2012 Leading Sectors by # of Jobs: Health Care (15%), Retail Trade (14%), Accommodation & Food (11%)

Demographic and Socioeconomic Trends

The Region has a combined 2013 population of 1,542,449 (BEBR 2013 Population Estimate), which represents 8 percent of the state's total population (19,259,543). The table below reports population counts (2000, 2010), estimates (2012) and projections (2015-2040). The Region is projected to add an average 60 new residents each day through 2040, which will lead to an increase of approximately 619,828 people.

Exhibit 5 – Projected Regional Population Growth

AREA	CENSUS 2000	ESTIMATE 2005	CENSUS 2010	ESTIMATE 2012	PROJECTIONS					
					2015	2020	2025	2030	2035	2040
Baker	22,259	23,953	27,115	26,938	28,300	30,500	32,500	34,200	35,700	37,100
Clay	140,814	169,623	190,865	192,071	203,500	226,800	248,500	268,700	286,500	302,200
Duval	778,879	861,150	864,263	869,729	889,800	930,700	969,700	1,005,900	1,036,000	1,063,700
Flagler	49,832	78,617	95,696	97,160	107,400	128,000	147,300	165,200	181,500	195,700
Nassau	57,663	65,759	73,314	73,745	77,600	85,500	92,900	99,400	105,500	111,300
Putnam	70,423	73,764	74,364	73,158	73,500	74,400	74,900	75,600	76,100	76,600
St Johns	123,135	157,278	190,039	196,071	213,500	247,500	279,800	309,600	336,700	362,100
Region	1,243,005	1,430,144	1,515,656	1,528,872	1,593,600	1,723,400	1,845,600	1,958,600	2,058,000	2,148,700
Florida	15,982,400	17,865,737	18,801,310	19,074,434	19,750,600	21,141,300	22,434,000	23,601,100	24,639,500	25,583,200

Source: Bureau of Economic and Business Research, Florida Population Studies, Bulletin 165, March 2013.

Age Characteristics

The 2006 median age in Florida: 39.9 years; the 2012 median age in Florida: 41 years. Within the Region, the median age in 2006: 45.5 years; 2012: 38.5 years. Median age describes the population with an even split above and below the median age.

Nearly three-quarters (72%) of the Region's population today is white.[2] Approximately 22% of the population is Black, and only 6% of the population is Hispanic.[3] Statewide, approximately 68% of the population is White, 15% Black and 17% Hispanic.[4]

[2] Bureau of Economic and Business Research, University of Florida

[3] Bureau of Economic and Business Research, University of Florida

[4] Bureau of Economic and Business Research, University of Florida

Workforce Development

Military

Northeast Florida supports four active military installations: Naval Air Station Jacksonville (NAS Jacksonville), Naval Station Mayport (NS Mayport), Marine Corps Blount Island Command and Camp Blanding Joint Training Center. These military installations employ both enlisted and civilian personnel in high-tech fields such as aeronautics and logistics. Every year, more than 3,000 highly trained, mission-oriented personnel exit or retire from military service, and 80% of those choose to stay in Jacksonville.[5] The key to capitalizing on the skill sets of these military personnel is in retaining them once they leave the military.

Education

From an educational attainment perspective, the Region is consistent with the State of Florida.

- In 2006, 51% of households had a high school degree or less; 43.3% attained a bachelor's degree; and 5.2% hold a graduate degree within the Region.[6]
- For the Region, the 2003-04 School Year reflects the lowest high school graduation rate of 53%.
- The high school graduation rate for the Region has increased for the 2011-12 School Year to 73%, mirroring fluctuations statewide.
- The 8th Grade Math performance measure for Year 2013 is the lowest (52%) point from a three year decline

Northeast Florida has several 4-year universities including The Art Institute of Jacksonville, Edward Waters College, Jacksonville University, Jones College, Florida Coastal School of Law, Florida State College at Jacksonville, Flagler College, University of North Florida and the University of Phoenix. In addition to these, the Region is within proximity to the University of Florida, Florida State University, the University of Central Florida, Embry-Riddle University, and Florida A & M. The Region's community colleges and universities also provide career and technical education and continuing education programs.

[5] Source: Jacksonville Chamber of Commerce
[6] Source: Florida Department of Education

Transportation Access/Infrastructure

The Region also has a substantial railway and roadway network. The rail and roadway network within the Region connects large, developable tracts of land to freight receiving areas such as deep-water ports. The same infrastructure provides access to visitors touring the Region.

- In 2012, 47 million miles per day were traveled in the Region, 9% of the statewide total.
- For Duval County, 27 million miles per day were traveled in 2012.

Strategic Intermodal System (SIS) Facilities

Florida's Strategic Intermodal System (SIS) is a statewide network of high-priority transportation facilities that includes the state's largest and most significant commercial service airports, spaceport, deep-water seaports, freight rail terminals, passenger rail and intercity bus terminals, rail corridors, waterways and highways. These facilities carry more than 99 percent of all commercial air passengers, virtually all waterborne freight tonnage, almost all rail freight, more than 68 percent of all truck traffic and 54 percent of total traffic on the State Highway System.

With the Region's existing roadways, rail lines, ports, and airports, the Region has the existing multimodal infrastructure necessary for both receiving and exporting large amounts of freight. Interstate 95, the primary north-south highway along the eastern seaboard, and Interstate 10, the primary east-west highway along the southern United States, converge within the Region.

Airports

The Region is served by ten airports and seven seaports. Jacksonville International Airport (JIA) is the only international airport in the Region. The other aviation facilities in the Region include Craig Municipal Airport, Cecil Field, Fernandina Beach Municipal Airport, Flagler County Airport, Herlong Airport, Kay Larkin Airport/ Palatka Municipal Airport, Keystone Airpark (A portion is in Bradford County), Hilliard Airpark and Northeast Florida Regional Airport.

Seaports

Jacksonville and Fernandina Beach both contain natural deep-water seaports. They are full-service ports and provide terminal handling and stevedoring services. They can handle container and conventional vessels with warehousing and crane services. "Deep-water Ports" are defined as those ports that can handle a fully loaded Panamax ship. A Panamax ship is defined as the largest ship that can navigate through the Panama Canal. Currently, the maximum dimensions for a Panamax ship are: length: 965 feet; beam (width): 106 feet; draft: 39.5 feet.

Military Installations

Northeast Florida has four active military installations: Naval Air Station Jacksonville (NAS Jacksonville), Naval Station Mayport (NS Mayport), Marine Corps Blount Island Command and Camp Blanding. According to Enterprise Florida, military and defense operations in Florida contribute over $52 billion to the economy. Regionally, the total regional economic impact to Northeast Florida is estimated at $14.1 billion.[7] Additionally, the military and defense economic impacts have risen approximately 10% each year for the past six years.

According to the Florida Defense Factbook, a program of Enterprise Florida, procurement, salaries, and pensions/transfers accounted for $4.1 billion in defense spending within Northeast Florida. Directly and indirectly, the military is responsible for 188,900 jobs in Northeast Florida. The average wage earning per military job in Northeast Florida is $40,000 per year.

According to the Cornerstone Regional Development Partnership, 16 of every 100 Northeast Florida-area residents are connected with the Navy. Additionally, approximately 4,100 Northeast Florida military personnel retire or exit from military service. Of those, 80% stay in Northeast Florida.

[7] Enterprise Florida, Florida Defense Factbook

Camp Blanding Joint Training Center

Camp Blanding, the primary training facility for the Florida Army National Guard, serves the training needs for active Army and Reserve units as well as Army and Air National Guard units.

Naval Station (NS) Mayport

Since its commissioning in December 1942, Naval Station Mayport has grown to become the third largest fleet concentration area in the United States. Mayport's operational composition is unique, with a busy harbor capable of accommodating 34 ships and an 8,000-foot runway capable of handling any aircraft in the Department of Defense inventory.

Marine Corps Blount Island Command

The Blount Island Command is a logistics base that supports Marine Corps prepositioning activities and expeditionary forces. The base plans and coordinates maritime operations which may have a military or humanitarian purpose.

Naval Air Station (NAS) Jacksonville

NAS Jacksonville employs over 24,000 civilian and active duty personnel (14,920 active duty, and 10,325 civilian personnel). NAS Jacksonville is home to the Navy's largest aviation squadron, Patron Squadron Thirty (VP-30), and is an aviation maintenance training facility. The economic impact of NAS Jacksonville is calculated at $2.7 billion annually. In salaries alone, NAS Jacksonville is directly responsible for over $1.1 billion per year.[8]

Resources and Environment

Northeast Florida has a strategic advantage in that large areas of vacant, accessible land can be developed for industrial uses. The Region has relatively large swaths of undeveloped land, making Northeast Florida attractive for the assembling of land for large-scale developments. The development of these lands is dependent on the availability of centralized water and sewer.

Northeast Florida is fortunate to have large amounts of active agriculture that produce ornamentals, sod, and food crops. Additionally, there are substantial areas of silviculture. The active agriculture serves not only as an economic engine for the Region, but, if capitalized on, will make the Region more sustainable, both in terms of a local food supplier and in terms of biomass fuel production.

The Northeast Florida Region lies within the St. Johns River Water Management District (SJRWMD). Within this district, potable groundwater is withdrawn from the Floridan aquifer. Of the five major groundwater basins, three cover the seven-county region that comprises Northeast Florida; the St. Mary's Groundwater Basin, the Lower St. Johns Groundwater Basin, and the Volusia Groundwater Basin.

Water use by population and by category is summarized below. Water is indicated in millions of gallons (mgd) per day.

[8] Source: Enterprise Florida, Florida Defense Factbook

Exhibit 6 – Water Usage Comparison 2007 and 2011

COUNTY	2007 Public Supply POPULATION	2007 Water Usage (mgd)	2011 Public Supply POPULATION	2011 WATER USAGE (mgd)
Baker	4,162	5.85	5,018	7.90
Clay	128,106	28.23	135,712	30.48
Duval	289,300	178.99	821,371	176.22
Flagler	10,212	41.38	76,993	33.63
Nassau	27,085	53.01	36,105	54.62
Putnam	11,456	50.86	13,329	55.66
St. Johns	132,848	60.81	154,282	63.79

Source: St. Johns River Water Management District

A fundamental resource challenge facing Northeast Florida is water, both in terms of availability and distribution. Portions of the Region are in a water resource caution area, meaning that projected demand for water will exceed its availability. It is expected that the remainder of Northeast Florida will be within a water resource caution area within the next few years. In addition to water availability, is a lack of region-wide potable water distribution system.

In addition to potable water supply and distribution, the centralized sanitary sewer treatment is not available region-wide. As is the case with potable water, individual septic systems are not adequate for large-scale industrial and business park development.

There are nine providers of electricity within Northeast Florida: Beaches Energy Services, Clay Electric Cooperative, Florida Power & Light, Florida Public Utilities, Green Cove Springs, JEA, Okefenoke REMC, Progress Energy Florida, and Seminole Electric.

TECO Peoples Gas provides natural gas to residential, commercial, and industrial customers in Northeast Florida. Natural gas provides clean energy for a wide range of uses, including home heating, vehicles, and electric generation. Natural gas is the cleanest-burning fossil fuel.

Florida is part of the Southeast Region interstate pipeline network, which includes Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee. Twenty-three interstate, and at least eight intrastate, natural gas pipeline companies operate within the Southeast Region. Fifteen of the twenty-one interstate natural gas pipelines originate in the Southwest Region and receive most of their supplies from the Gulf of Mexico or from the States of Texas and/or Louisiana.

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SWOT

An in-depth analysis of economic and community strengths, weaknesses, opportunities and threats providing the foundation for the action plan. It answers the question "where are we now?" by labelling the critical internal and external factors influencing our regional economy.

Strengths represent positive factors within our control on which we could capitalize, such as competitive advantages, unique selling points, resources, assets, experience, knowledge, geographic location, and qualifications/reputations.

Weaknesses represent negative factors within our control that should be limited or improved upon, such as gaps in capabilities, lack of competitive strengths, reliability of partnerships, funding, or leadership.

Opportunities include positive factors outside of our control on which we could capitalize, including emerging market developments, competitors' vulnerabilities, industry trends, lifestyle trends, geographical features, and partnerships.

Threats include negative factors outside our control whose effects we seek to lessen. Threats include political, legislative, and environmental effects, sustainable financial backing, seasonality, and weather effects. Resiliency plays a key role in curing impacts of outside threats.

Strengths, Weaknesses, Opportunities & Threats

The rewrite of the 2009 Comprehensive Economic Development Strategy represents an intense effort by regional leaders seeking economic resiliency in Northeast Florida. The Region is facing an economic recovery—experiencing reductions in unemployment, increases in household incomes, and a stabilizing labor force. Since initial implementation, several counties, municipalities, and private entities have executed recession recovery actions; helping reach the seven original goals identified for regional prosperity. This current effort builds upon those plans and helps classify regional issues.

Determining what our Region possesses enables us to leverage our assets, building the capacity needed for prosperity. A majority of all findings from the SWOT assessment are positive factors (either Strengths or Opportunities) reflecting the state of the Region. The highest number of factors fall inside our control, with 75 individual Regional Strengths outlined between the eleven topic areas. The top illustrative Regional Strengths include Education, Quality of Life/Place, Water Quality and Innovation & Economic Development. Two of these top strengths are 6 Pillar™ foundations. The Region includes 55 individual Opportunities to pursue in the areas of Transportation, Education, Health, and Business Climate/Competitiveness.

The Region's economic resiliency is also impacted by weaknesses and threats. Of these negative factors, most are weaknesses within our control. The SWOT analysis identified 54 individual Weaknesses, including perceptions that may hinder regional job growth and prosperity including areas of improvement in Education, Transportation, Health, and Water Quality. The Region is also affected by negative factors outside our control. These threats include 35 separate factors among the Innovation & Economic Development, Water Quality, Education, and Health topic areas.

Regional Strengths

Education

***Regional Knowledge*—**The Region possesses two of the top ten high schools within all U.S. school districts and the St. Johns County School District is the top school district within the State of Florida. The Duval County School District has been out performing prior measures. Success is attributed to the passion of educators and leadership under Dr. Vitti.

The regional opportunities within primary, secondary and advanced education include academies within high schools, trade and workforce development, and advanced health science and law studies.

Private and public four year universities are growing in popularity with Flagler College and the University of North Florida experiencing increased annual enrollment. Jacksonville University reports higher grade point averages. The Florida State College at Jacksonville and St. Johns River State College fill gaps in access to secondary education with regional campus locations. The Region is partnered with the University of Florida as its research university and is top 10 in attracting college educated adults – a 14% gain in this demographic.

Quality of Life & Quality Places

***Unique Selling Points*—**The Region is Florida's First Coast, with 140 miles of coastline along the Atlantic Ocean. The seven counties of the Region are clustered along the St. Johns River (over 300 miles in total length) and its tributaries including the Intracoastal Waterway. The warm, sunny climate encourages residents and visitors alike to explore regional trails, parks and preserves including a three mile downtown riverwalk, historic neighborhoods and historic cities. Of the historic cities, Palatka is a rural trail hub for the Region and highlights the existing regional connections for eco-toursim and historic preservation. Mooring fields within the regional waterbodies allow for extended recreational trips. Entertainment venues like the St. Augustine Amphitheater attract visitors within and outside of the Region. The Region hosts major sports teams and events including the Jacksonville Jaguars and The Players Championship (TPC) Tournament in Ponte Vedra Beach. Regional planning is a core value resulting in strong transportation, education, and health policies.

Water Quality

***Resource Quality*—**Northeast Florida recognizes the St. Johns River as a feature, asset, and water source. The Region includes a strong public water supply system distributed by younger infrastructure than aged systems elsewhere. The Jacksonville Electric Authority (JEA) is experiencing a reduction in potable water demand (2011 water usage for Duval County reduced by 2.77 million gallons per day, SJRWMD). The Region implements the Total Maximum Daily Load (TMDL) program to maintain surface water quality.

According to data from the SJRWMD, 56% of the region's land area is recreation acres; supporting a high percentage of land conservation adjacent to creeks and streams. The St. Johns River and Intracoastal Waterway provides recreational activities.

Transportation

***Intermodal Transportation*—**the Region is a logistics center with intermodal transportation infrastructure: airports, seaports, rail, and roadways. The infrastructure is newer than other facilities within the state and nation. The regional airport system, consisting of 10 facilities, has excess capacity crowned by an international airport (JIA). The two deep water ports include the Port of Fernandina and JaxPort. Interstate 95 and Interstate 10 converge in the Region moving freight and people with short regional commute times. The Region includes a space port at the Cecil Commerce Center.

Health

Strong Health Capacity—the Region is defined by the cooperative nature between the 18 regional health facilities (refer to Figure 2 Health Facilities of Regional Significance, SRPP). The available capacity in each facility is seen as strength to address community health issues. Two specific facilities, Mayo Clinic and UF/Shands, represent key partners with associated health industries of research, IT development and insurance companies supporting research and innovation.

Innovation & Economic Development

Job Port—regional economic development cooperation contributes to the success of the established and expanding high tech companies. Local investment and innovation through crowdfunding festivals like One Spark represent the Region's pursuit of innovation. The Region draws international attention for business prospects as well as in state migration from south Florida. Deepening the federal shipping channel to maintain and expand the competitiveness of Jacksonville's port, while balancing protection of our environmental resources, is both a short and long term economic development project, critical to the Region, State and Nation.

Civic & Governance Systems

Tiered Civic Involvement—Jacksonville, as the economic hub of the region, is supported by a consolidated City/County form of government. Civic engagement through volunteerism, non-profit organizations and active community leaders contributes to regional prosperity. The number of registered non-profit organization has increased within each county and the Region overall. In addition, the JCCI study, Recession Recovery and Beyond, Recommendation #8 recognizes the University of North Florida as the state's designated business assistance organization.

Business Climate & Competitiveness

Hospitable Business Climate—a low tax structure, including no state income tax, provides a competitive business advantage for the Region. Coupled with the presence of three activity military installations, which create a 14.1 billion dollar impact to the regional economy, the business climate is favorable for job creation. The Region is known for its hospitable attitude toward business startups, expansions, and innovation.

Talent Supply & Education

Attract & Educate Talent—the key educational strengths, supported by quality of life factors and the military presence, attract the talent supply for the Region. The quality and amount of primary and secondary institutions create homegrown talent.

Water Quantity

Water Source—the Region is described as having a highly productive aquifer.

Coordination with the St Johns River Water Management District is paramount to balance consumption of ground water withdrawal. The perceived abundance of water is a competitive strength to support the triple bottom line of people, planet and profit (JCCI Study Recession Recovery and Beyond).

Infrastructure & Growth Leadership

Regional Cooperation**—**the Region has a cooperative reputation shown through the partnerships between the individual Chambers of Commerce and other regional entities. The creation and on-going involvement of the Regional Leadership Academy builds upon these relationships to help define the brand for the Region.

Regional Weaknesses

Education

Lack of Self-Promotion/Misperceptions—the negative perception of the K-12 primary education system includes poor performance under conservative leadership. It hinders growth by affecting funding decisions, locational decisions, and the overall community mindset to recognize the Region as a top performing district. This perception is influenced by politics, where the health of school system may be evaluated by board member tensions rather than performance measures.

Other identified weaknesses include inequality between schools within the same district, lack of parental involvement, and an average high school graduation rate (74% of high school students graduate). Lack of adequate funding for the public school system affects teacher recruitment. Outside of primary education, weaknesses include the effectiveness of skilled labor training programs and preparations for a global economy.

Quality of Life & Quality Places

Sprawling Population—the combination of low density and urban sprawl detracts from the unique sense of place within the Region and contributes to gaps in infrastructure, blight, and food deserts. The lack of development in downtown Jacksonville weakens by drawing resources away from the Region's hub. The location of the jail in downtown Jacksonville does not represent the highest and best use of this core area. Similarly, within the municipal downtowns, weed & seed areas hinder new development or redevelopment.

Water Quality

Improving Water Quality—the high quality and abundance of water in Northeast Florida attracts a demand for inter-basin transfer to central Florida. Along with interbasin transfer, the Sante Fe River Basin and the overall declining water quality of springs and tributaries of the St. Johns River weakens the Region's resources. Water conservation is a concern along with pollution in areas of high public use, such as McCoy's Creek and Hogan's Creek in Jacksonville. The lack of a regional central sewer system, especially in areas experiencing pollution, impacts the regional environment.

Transportation

Significant portions of roadways in the Region are part of the Strategic Intermodal System maintained by the Florida Department of Transportation. In this arrangement, the Department establishes the level of service (capacity) of these roadways. The outside maintenance and ownership of the regional roadways is also regulated by legislative requirements for the Strategic Intermodal Systems that shifts funding priorities to these roadways, creating challenges to access the funding through the Department. This is illustrated by the lack of funding for the First Coast Outer Beltway.

Growth in the Region has outpaced other regions, yet transportation construction has not kept pace. Coupled with a lack of enhanced public transportation and connectivity between the individual systems within the counties and municipalities, the transportation infrastructure is fragmented. The regional low density development patterns influence traffic volumes.

For other modes of transportation, the height of the Shands Bridge impacts the type of boat traffic able to move north and south along the St. Johns River. In addition, the available capacity of JIA reveals a lack of direct flights to and from this international airport.

Health

Access & Availability—notwithstanding the number of regional health facilities, disparities exist among health providers and availability within the seven county region. Influenced by state requirements that drive certificates of need and emergency room locations, flexibility is limited when determining the location of health facilities. Access to health facilities is hindered by lack of mass transit, walkability and low density development patterns.

As the hub for the region, Duval County ranks 46 out of 67 statewide in overall health outcomes. The number of food deserts or populations without access to healthy food options contributes to declining community health. Lack of funding for specific health issues and facilities, such as mental health and UF/Shands for indigent care impacts vulnerable populations of the region.

Innovation & Economic Development

Regional Mindset—the region's hospitable business climate is moderated by a lack of "mojo" and incentives for competition. This community mindset may be perceived to hinder innovations and startup economic development projects. Within the Region, the abundance of unentitled raw land and the lack of built and properly positioned space, slows the development process.

Civic & Governance Systems

Inherent Conflicts—Regional cooperation experiences disruptions from the inherent competitions between cities and counties to compete with each other.

Business Climate & Competitiveness

Available Stock—the Region includes aging office building products, unattractive to expansion or new locations. Within the region, availability of vacant space in other counties is a competitive factor. The lack of entitled land or land with flexible regulations creates barriers for competitions.

Talent Supply & Education

None identified during committee.

Water Quantity

Undervalued Demand—Currently, the cost of water is priced too low under its assigned value and undercuts conservation programs. The Region experiences continued growth of high water use communities, demanding potable water for irrigation purposes.

Infrastructure & Growth Leadership

Visionary Leaders—Development and maintenance of regional infrastructure is affected by a lack of vision at the leadership level.

Strategic Direction & Action Plan

Current Plan Crosswalk

The Committee reviewed the following plans and visions and was guided by the vast amount of work already done to prepare for the future of Northeast Florida and its communities:

Exhibit 7 – Plans and Visions

Area	Source(s)	Website
Region		
	Innovate Northeast Florida	www.innovatenortheastflorida.com
	First Coast Vision	www.firstcoastvision.com
	Northeast Florida Strategic Regional Policy Plan	www.nefrc.org/SRPP.htm
	JCCI: Recession, Recovery and Beyond	http://issuu.com/jcci/docs/11-recession-recovery-and-beyond-study-report/1
	Six Pillar Caucus NE Florida	www.flchamber.com/six-pillars/six-pillars-communities/
Cities		
	Brentwood Health Impact Assessment	http://assets.thehcn.net/content/sites/northeastflorida/Brentwood_Health_Impact_Assessment_for_Website.pdf
	Jax2025	www.jax2025.org
	City of Palm Coast Prosperity 2021	http://www.palmcoastgov.com/council/prosperity-2021
	Green Cove Springs Vision	http://www.nefrc.org/pdfs/CEDS/Vision%20Report.pdf
Counties		
	Baker County Comprehensive Plan	http://www.nefrc.org/pdfs/CEDS/Baker%20County%20Strategy.pdf
	Clay County Comprehensive Plan	http://www.claycountygov.com/departments/planning-section/planning-menu/2025-comprehensive-plan
	Duval/COJ Comprehensive Plan	http://www.coj.net/departments/planning-and-development/community-planning-division/comprehensive-plan.aspx
	Flagler County Comprehensive Plan	http://www.flaglercounty.org/DocumentCenter/Home/View/239
	Nassau County Comprehensive Plan	http://www.nassaucountyfl.com/index.aspx?nid=126
	Putnam County Comprehensive Plan	www.putnam-fl.com
	St. Johns Comprehensive Plan	www.sjcfl.us

The following themes were observed in existing plans and informed the Committee's work.

Downtown Jacksonville

Jacksonville is the Region's downtown, and it fails to realize its potential. It has been "planned" numerous times in the past but a consistent vision and will to implement has always been missing. It remains an area challenged by high vacancy rates, limited residential use and general lack of vibrancy. The underperformance of downtown has implications for the municipal budget, as downtowns in thriving economies provide a significant portion of the tax base. Efforts are underway to consolidate its many plans into a single Community Redevelopment Area plan, and there are numerous signs that young people and businesses are creating energy downtown. This grassroots energy can succeed where government has so often failed. The Committee concurs with the findings of the plans and visions that consistent and creative focus on downtown Jacksonville is a regional priority.

Multiple Growth Centers

Public polling associated with First Coast Vision identified multiple centers as the growth pattern appropriate for Northeast Florida. Counties and their communities are implementing this pattern by identifying areas appropriate for development or redevelopment and encouraging growth there. The downtowns of cities and towns throughout the region have seen disinvestment during the last decades of suburban growth, but the focus is changing. The concept of walkability has been recognized in all counties and the benefits of vibrant, interesting and walkable downtowns are beginning to be understood. Add to this an aging population and a Region known for high rates of bicycle and pedestrian accidents and fatalities, and it is possible to seize the momentum to revitalize downtowns throughout the Region. They hold out potential for businesses and community services but also as tourist destinations.

Small Business

Despite the Region's traditional economic development focus on high paying jobs as embodied in the last CEDS, Innovate Northeast Florida and other plans recognize that focus on small business is as necessary as focus on targeted industries, and that the two are inter-dependent. The Region is becoming known for its attractiveness to start-ups, has talented and energetic people supporting each other in small business innovation, and has a robust community of technical assistance providers. The Committee recognizes the impact of small businesses on the economy and agrees that nurturing it is a priority.

Equality of Opportunity

All of the plans recognize the achievement gaps and disparity of wealth in our communities. The Region's growth pattern and lack of transportation alternatives force concentrations of poverty, and its school systems are not providing adequate ways for students to succeed. Those who do succeed often leave the Region. Those who live in poverty in Northeast Florida experience outcomes that are less desirable in most aspects of life, including health, income, lifespan, and opportunity. Northeast Florida is a Region where it can be said that your zip code defines your outcomes. Our communities recognize this, and the Committee agrees. There is no more important priority.

Sustainability

While not a Region engaged in frequent discussion on climate change, the plans and visions show that local governments are changing their practices to do what they can to ensure that adequate clean water, air and natural resources are available to future generations. Public polling shows repeatedly that people live here because of the Region's natural resources. Good stewardship is a theme repeated in all of the plans and visions, and is a theme supported by the Committee.

Goals and Objectives: Building the Pillars

This section of the Comprehensive Economic Development Strategy sets forth goals and objectives necessary to solve our economic problems, or to capitalize on our resources of the region. Goals are broad, primary regional expectations. Objectives are more specific than goals, clearly measurable, and stated in realistic terms considering what can be accomplished over the **five-year period** of the Comprehensive Economic Development Strategy.

The Committee determined that the education of our residents was the pivotal issue for the next 5 years. Their thinking was that if you deal with the issues sufficient to make education work, you learn about your community and make the connections necessary to succeed. Learn from each other to fix education and you transform the community and the prospects for its youth.

Exhibit 8 – Goals & Objectives

Talent Supply & Education

Create an all-inclusive talent supply and education system that prepares every child for higher education, matches targeted industry needs with education curricula, and provides access to everyone.

> Objective 1: Support "school-work" programs in each primary education district and secondary education college, by enlisting representatives from each targeted industry.
>
> Objective 2: Increase the high school graduation rate in each school district by focusing resources (programs, activities, dollars) on students in danger of failing.

Innovation and Economic Development

Foster a modern outlook toward energy resources, infrastructure, and efficiencies that will spark innovative opportunities for business growth, expand mass transit, attract talent, and brand the Region as a leader in sustainable development.

> Objective 1: Increase the number of businesses within the targeted energy infrastructure and energy efficiency industries.
>
> Objective 2: Improve existing structure energy efficiencies using a variety of methods for residential or commercial.

Infrastructure and Growth Leadership

Cultivate diversity among lifestyle choices (urban, suburban, exurban, rural) within the Region by tailoring infrastructure investments to each growth character area through partnership based growth and development.

Objective 1: Simultaneously link central water/sewer infrastructure to growth character areas and remove failing septic tanks from the most sensitive areas.

Business Climate & Competiveness

Celebrate and promote the Region's "homegrown" climate, building on our brand as a top place to stay and relocate through partnerships. Connect economic development and sustainability to create regional identity.

Objective 1: Champion the Region through partnerships, marketing campaigns, and individual positive promotion.

Objective 2: Split responsibilities between public, private and non-profit entities to close gaps in food deficiencies and expand connections between food supplies and demand.

Objective 3: Connect the core functions of the Regional Educational Facilities to Downtown Jacksonville by either transplanting campus elements or linking through direct mass transit.

Civic & Governance Systems

Maintain the gains in the Region, focusing on areas of needed improvement, by aligning responsibilities between non-profits, philanthropic businesses, and the government.

Objective 1: Create an alliance between the regional entities to foster new and strengthen existing partnerships.

Objective 2: Support regional transportation infrastructure to promote multi-modal systems, improvements to outdated components and enhanced connectivity among the growth centers in the Region.

Quality of Life/Quality Place

Eliminate economic detractors to improve access to healthy food and clean water, readiness for site development, and partnerships for sustaining life in the Region.

Objective 1: Support multiple growth centers in the Region by approving private development that contributes to each lifestyle character area.

Objective 2: Incorporate the variety of lifestyle choices within the Regional marketing campaign.

Plan of Action: Target Area Pillars

A plan of action implements the goals and objectives of the Comprehensive Economic Development Strategy through a series of projects, programs, and activities in a manner that:

- Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy—***Talent Supply & Education***
- Obtains and utilizes adequate funds and other resources—***Innovation & Economic Development***
- Fosters effective transportation access, Promotes the use of technology in economic development, including access to high-speed telecommunications—***Infrastructure & Growth Leadership***
- Promotes economic development and opportunity—***Business Climate & Competitiveness***
- Balances resources through sound management of physical development—***Civic & Governance Systems***
- Enhances and protects the environment—***Quality of Life & Quality Places***

Strategic Projects, Programs and Activities: Priority Pillar Projects

This section identifies and describes suggested projects and activities including partnerships, funding sources, and timeframes. From the cumulative list (refer to appendices), the vital projects represent the current priorities for the Region. All strategic projects listed, underway or to be created in the Region are consistent with the pillars, goals and objectives of the Comprehensive Economic Development Strategy.

Suggested Projects

- All suggested projects, programs, and activities.

Regionally Significant Projects

- A prioritization of projects, programs, and activities that address the region’s important needs.

Vital Projects

- Identification of those focus projects, programs, and activities that will best enhance the region's competitiveness, including sources of funding for past and potential future investments.

Suggested Projects

The plan aligns the public and private sectors and is a requirement for our certified Economic Development District to be eligible for federal grant programs. As an economic development planning tool, the action plan provides alternative funding mechanisms for projects in the Region. The Regional Community Institute, the non-profit policy arm of the Northeast Florida Regional Council, recognizes the potential applications of the CEDS action plan to implement a strategic initiative addressing business climate through the support of small business development. Simply put, the recommendation outlines a project review process to apply for at least one federal grant each year.

Action Item Summary—Strategy #4 Business Climate & Competitiveness

The NEFRC has a goal of submitting at least one grant application to the Economic Development Administration each year. The selection of grant topic(s) will be informed by three factors:

- Current conditions
- The Comprehensive Economic Development Strategy
- The recommendations of a small business group to be convened by NEFRC quarterly

The small business group shall be comprised of all who have participated in RCI Strategic Initiative committee meetings, and their guests. This group will be notified of meetings. Their recommendations will be considered by the NEFRC Chief Executive Officer.

Exhibit 9 – Vital Projects

The Action plan includes suggested projects, regionally significant projects and vital projects necessary to achieve the goals and objectives outlined for the regional economic strategy. Of the three types of projects, vital projects represent the focus areas of the plan that will best enhance the Region's success. This list is an excerpt of Appendix D – Project List; please refer to the complete exhibit for the entire project description.

<u>Talent Supply & Education Pillar</u>
21st Century eLearning Platform Project
Capitalize on Veterans
Advanced Manufacturing

<u>Innovation & Economic Development Pillar</u>
Alternative fuels

<u>Infrastructure & Growth Leadership Pillar</u>
Raise the Shands Bridge
Google Fiber Project
Jacksonville Port Expansion

<u>Business Climate & Competitiveness Pillar</u>
Food Innovation and Business Incubator
Food Security Study

<u>Civic & Governance Systems Pillar</u>
"Farm to Flag"

<u>Quality of Life/Quality Places Pillar</u>
Energy, water efficiency, resiliency, and accessibility retrofit for low and very low income residents of the region
Regional Maritime Management Plan

Evaluation Framework

Performance metrics matter. Metrics evaluate progress towards achieving the Region's vision, specific goals, and particular objectives by monitoring project activity. This level of detail also fuels the annual reporting requirements and affects the overarching metrics that reveal how our region is doing.

In addition to the input and output metrics listed below, the economic development strategy can be evaluated by metrics within the 6 Pillars™ Framework. The Florida Chamber Foundation supplies sample metrics that enable us to measure regional capacity and prosperity. Data sources for input and output metrics include public data like the Florida Score card and private information from specific project achievements. The vital projects action plan identifies the input and output metrics necessary to monitor our success.

Input Metrics

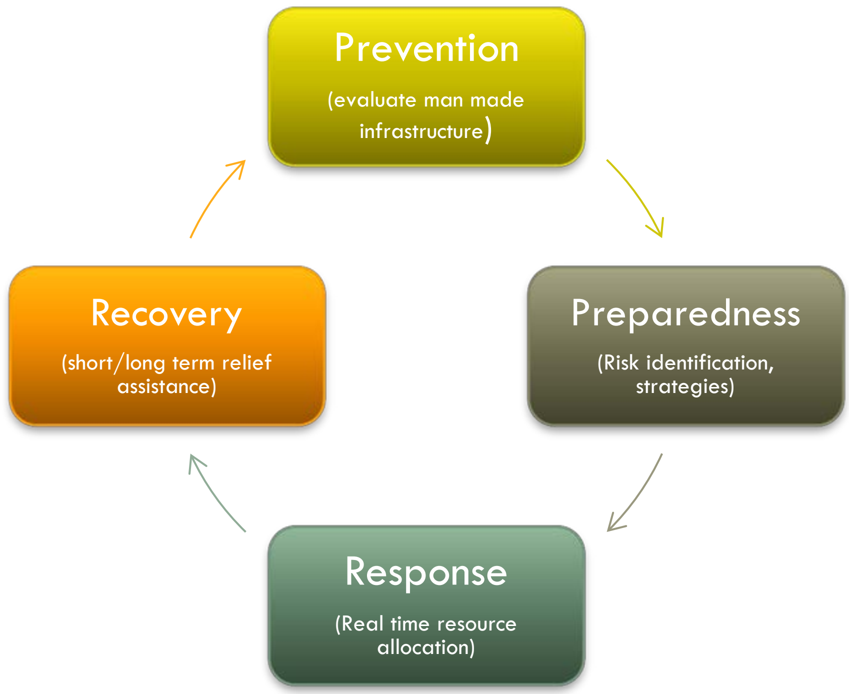
Metric	Source(s)	Website
Human Assets		
High School Graduation Rates	Florida Department of Education	www.fldoe.com
School District Ranking	Florida Department of Education	www.fldoe.com
Financial Capital Metrics		
EDA sponsored investments	EDA grant recipients	
State investments		
Local investments		
Private sector investments	CEDS Action Plan & Annual report	www.nefrc.org
Regulatory Environment		
Taxes and fees	Florida Department of Revenue	www.dor.myflorida.com
State tax regulations	The Tax Foundation	www.taxfoundation.org
Incentive programs	Enterprise Florida	www.enterpriseflorida.com
Industrial base metrics		
Land use amendments by designation of industrial or commercial	Northeast Florida Regional Council	www.nefrc.org
Physical Infrastructure Metrics		
State Transportation infrastructure projects	Department of Transportation	www.dot.state.fl.us
Regional Transportation projects	Transportation Planning Organization	www.northfloridatpo.com

Output Metrics

Metric	Source(s)	Website
Prosperity Metrics		
Total employment (jobs) initial year	CEDS Action Plan & Annual report	www.nefrc.org
Total employment (jobs) each year	Regional Economic Modeling, Inc. (REMI)	www.nefrc.org
Jobs retained by Federal investment	CEDS Action Plan & Annual report	www.nefrc.org
Jobs retained by State/Local investment	CEDS Action Plan & Annual report	www.nefrc.org
% change Job Creation	Regional Economic Modeling, Inc. (REMI)	www.nefrc.org
Unemployment rates	Department of Economic Opportunity	www.floridajobs.org
Per capita and median household income	Regional Economic Modeling, Inc. (REMI)	www.nefrc.org
Per capita income characteristics		

Economic Resiliency

Resiliency, or the ability to anticipate, neutralize, and recover from threats, is a measure of the strength of the Region's economy. Economic resiliency extends beyond responsiveness during a disaster into the areas of prevention planning.



The Region approaches economic resiliency through the disaster strategy contained in the Emergency Preparedness and Resiliency Chapter of the Strategic Regional Policy Plan, and in the combined Local Mitigation Strategies and Comprehensive Emergency Management Plans of its counties. Its Regional Action Plan for sea level rise, including the Public/Private Regional Resiliency Committee charged with developing a regional strategy that will incentivize population and private development to locate outside of vulnerable areas, is also part of its disaster strategy. All listed plans are incorporated into CEDS by reference.

Implementing disaster strategies involve four essential steps, as described below.

In order to assure that preparations of the Region will be adequate to assist businesses in responding to and recovering from emergencies and disasters, Florida's economic development organizations are key partners to help create and maintain a comprehensive emergency management program. Economic development organizations are positioned to coordinate with state, county, and local government, workforce, tourism and other business support agencies and organizations, as well as private agencies that have a role in emergency management.

The strategic intent is to provide local, state, and federal assistance to affected businesses in the Region in a comprehensive, coordinated, unified, and expedited manner to restore business operations and economic stability as quickly as possible.

Business, Industry and Economic Stabilization Responsibilities

Enterprise Florida

- Act as liaison between state government and agencies and economic development organizations.
- Provide economic development organizations with a template for an Emergency Management Plan consistent with the state CEMP.
- Assist economic development organizations with access to business resources from state agencies.
- Communicate disaster updates to economic development organizations on an as needed basis (e.g., daily, weekly).
- Encourage economic development organizations to participate in conducting Business Damage Surveys.
- Supply economic development organizations with business disaster information and guidance upon request.

Economic Development Organizations

- Coordinate with the SBDC's and county government along with other sources of business damage impact information to ensure that information is provided to the county regarding the overall physical and economic damages to the business community, as well as business preparedness, response and recovery matters, before, during and after the emergency or disaster.
- Coordinate with county government and other sources of business damage impact information to determine general business needs and to determine the desire and need of the community to request activation of the Florida Small Business Emergency Bridge Loan Program and/or Business Assistance Centers and workshops.
- Coordinate with the local SBDC's efforts to support public education, press releases, media interviews, and distribution of printed materials that describe the available resources and business assistance initiatives, including Business Assistance Centers and workshops that are being activated in region.
- Coordinate with SBDCs to facilitate pre and post disaster event workshops for educating and training businesses in disaster preparation, business continuity planning, and recovery.
- Provide business recovery assistance to businesses in all industry sectors in the region through networks of state, regional, and local partners.

Six Pillars Metrics: Additional Detail, Regional Assessment of Existing Conditions

Updates to the Six Pillars metrics of the 2009-2014 CEDS were completed to identify trends, patterns and changes in the Regional economy from adoption and initial implementation strategy. Analysis of the data can be framed by the following questions:

- What are the Region's principal growth sectors and clusters?
- What is driving the economy and where is it headed?

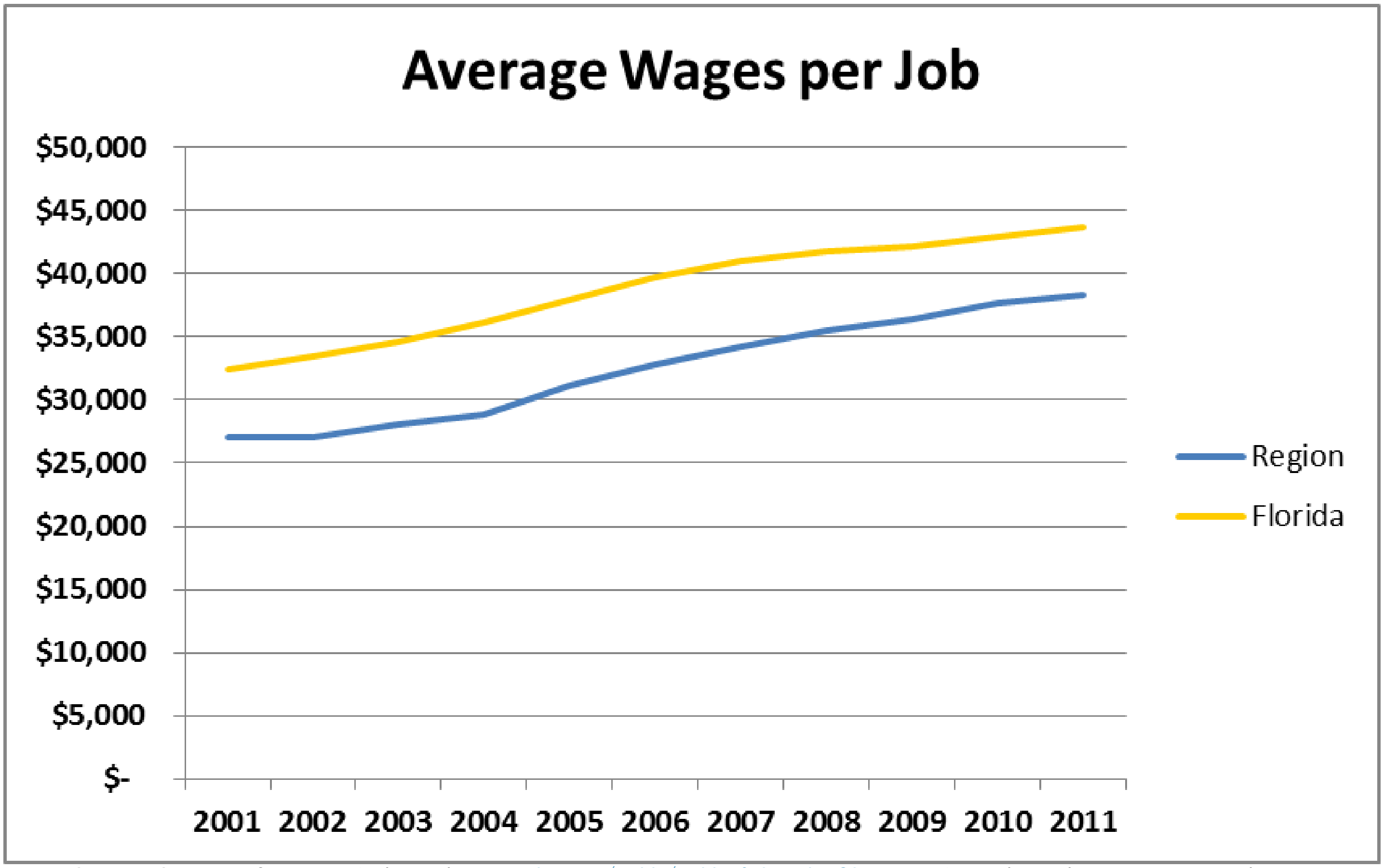
Talent Supply & Education

Average Annual Wages

Exhibit 1 – Average Wages per Job
Northeast Florida Region and State, 2001-2011

AREA	YEAR										
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Baker	$27,190	$24,869	$26,784	$27,853	$28,871	$29,426	$29,865	$30,818	$31,048	$31,428	$32,524
Clay	$27,289	$26,669	$27,690	$28,907	$30,529	$31,653	$32,408	$32,833	$33,285	$33,794	$34,742
Duval	$26,586	$36,685	$38,419	$40,069	$41,964	$44,288	$45,834	$46,168	$46,512	$47,744	$48,476
Flagler	$24,882	$26,353	$28,976	$30,154	$30,901	$31,617	$32,033	$32,078	$32,201	$32,680	$32,719
Nassau	$23,970	$31,470	$31,968	$32,538	$34,371	$35,333	$36,419	$36,393	$36,556	$38,915	$40,361
Putnam	$31,693	$28,123	$29,062	$29,667	$31,074	$31,992	$32,818	$34,049	$35,447	$35,570	$36,144
St. Johns	$21,957	$30,185	$30,938	$32,309	$34,144	$36,231	$37,544	$37,975	$37,847	$38,355	$39,070
Region	$27,068	$27,068	$28,120	$28,893	$31,162	$32,799	$34,192	$35,447	$36,407	$37,641	$38,364
Florida	$32,416	$33,406	$34,534	$36,148	$37,951	$39,663	$41,029	$41,818	$42,146	$42,871	$43,660

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).



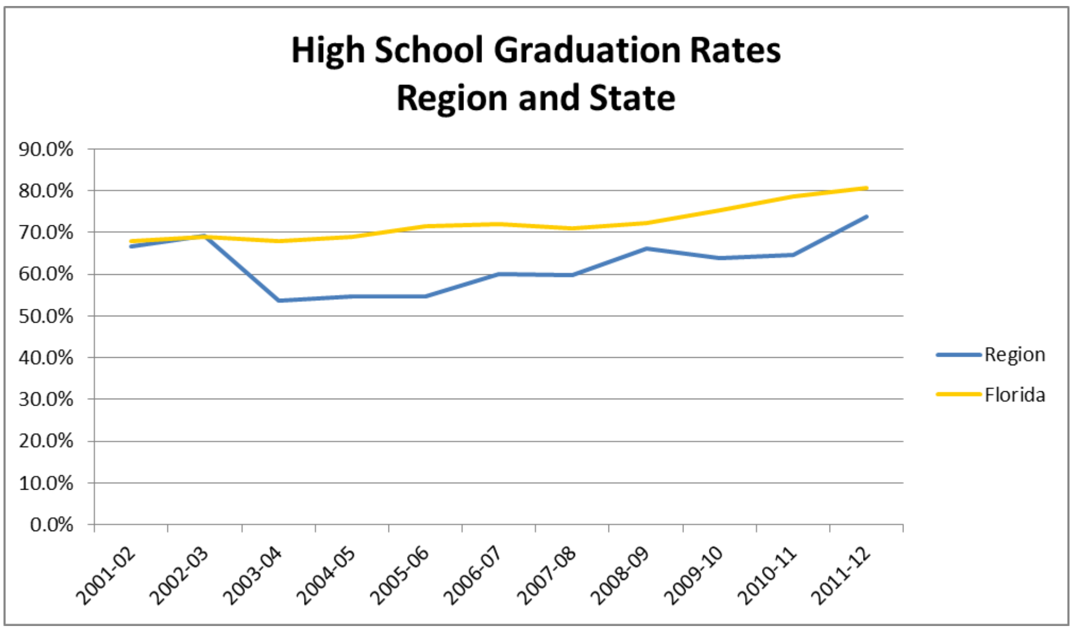
Source: U.S. Bureau of Economic Analysis website www.bea.gov/iTable/iTable.cfm?reqid=70&step=1> Note: The employment estimates used to compute the average wage are a job, not person, count. People holding more than one job are counted in the employment estimates for each job they hold. All state and local area dollar estimates are in current dollars (not adjusted for inflation).

High School Graduation Rates

Exhibit 2– High School Graduation Rates
Northeast Florida Region and State, School Years 2001-02 to 2011-12

Area	School Year										
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
Baker	60.80%	67.30%	49.90%	52.60%	52.20%	61.70%	60.40%	68.90%	64.50%	65.00%	72.80%
Clay	70.90%	75.40%	58.80%	58.90%	60.40%	61.60%	63.70%	67.00%	70.00%	74.40%	71.10%
Duval	75.10%	63.80%	55.30%	53.80%	55.40%	53.80%	57.70%	61.90%	56.00%	52.50%	77.10%
Flagler	69.90%	64.90%	54.60%	54.40%	53.30%	54.80%	53.50%	56.20%	55.50%	57.70%	62.10%
Nassau	76.70%	79.50%	61.00%	61.60%	62.40%	60.90%	59.50%	66.40%	76.40%	79.90%	89.00%
Putnam	71.10%	79.50%	56.00%	56.40%	52.60%	56.60%	57.90%	56.40%	57.70%	63.20%	58.90%
St. Johns	76.10%	78.20%	72.20%	70.70%	72.10%	71.10%	79.60%	83.00%	83.90%	85.80%	86.00%
Region	66.60%	69.20%	53.60%	54.80%	54.70%	60.00%	59.80%	66.20%	63.90%	64.70%	73.70%
Florida	67.90%	69.00%	67.90%	69.00%	71.60%	71.90%	71.00%	72.40%	75.40%	78.60%	80.70%

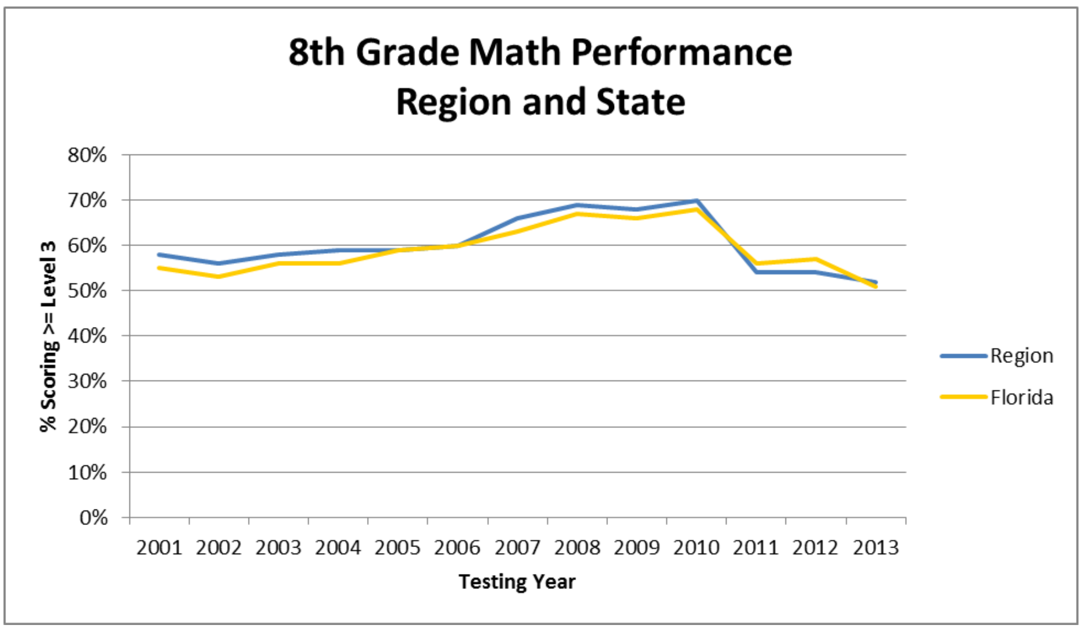
Source: Florida Department of Education, Data Publications, and Reports: Students www.fldoe.org/eias/eiaspubs/pubstudent.asp



8th Grade Math Performance

Exhibit 3– Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5
on Florida Comprehensive Assessment Test
Northeast Florida Region and State, 2001-2013

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Baker	53%	57%	57%	56%	59%	58%	67%	72%	73%	69%	58%	55%	59%
Clay	64%	65%	67%	64%	64%	66%	71%	72%	72%	73%	64%	61%	58%
Duval	43%	46%	35%	46%	55%	53%	57%	73%	67%	69%	48%	47%	49%
Flagler	54%	48%	51%	50%	48%	48%	57%	61%	59%	61%	55%	53%	53%
Nassau	61%	61%	63%	64%	65%	67%	68%	73%	72%	77%	55%	57%	57%
Putnam	44%	42%	45%	49%	50%	55%	54%	55%	54%	56%	36%	40%	44%
St. Johns	67%	64%	67%	73%	76%	73%	78%	78%	79%	80%	73%	77%	58%
Region	58%	56%	58%	59%	59%	60%	66%	69%	68%	70%	54%	54%	52%
Florida	55%	53%	56%	56%	59%	60%	63%	67%	66%	68%	56%	57%	51%



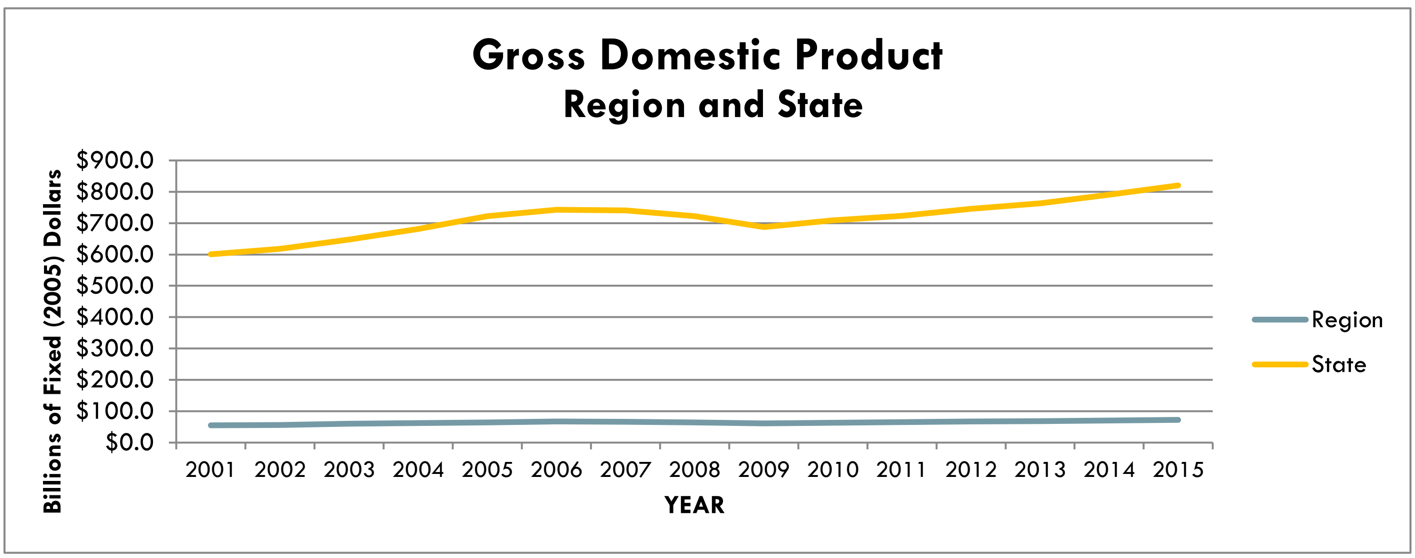
Innovation & Economic Development

Gross Domestic Product

Exhibit 4 – Gross Domestic Product
Northeast Florida Region and State, Billions of Fixed 2005 Dollars, 2001-2015

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Baker	0.33	0.36	0.39	0.41	0.44	0.44	0.45	0.44	0.41	0.42	0.43	0.44	0.45	0.46	0.48
Clay	2.52	2.65	2.90	3.01	3.25	3.60	3.63	3.56	3.38	3.45	3.46	3.58	3.67	3.81	3.97
Duval	44.80	45.77	48.22	50.03	51.48	53.70	52.51	51.26	48.76	50.83	52.11	53.42	54.28	55.96	58.02
Flagler	1.17	1.39	2.05	1.77	1.84	1.76	1.55	1.43	1.38	1.40	1.39	1.44	1.47	1.52	1.58
Nassau	1.25	1.26	1.35	1.38	1.44	1.52	1.55	1.55	1.42	1.46	1.49	1.54	1.57	1.62	1.68
Putnam	1.24	1.32	1.45	1.46	1.51	1.50	1.48	1.41	1.40	1.41	1.38	1.41	1.43	1.48	1.52
St. Johns	3.06	3.25	3.45	3.78	4.18	4.62	4.62	4.51	4.29	4.44	4.62	4.80	4.93	5.13	5.33
Region	54.36	56.00	59.80	61.84	64.15	67.14	65.80	64.16	61.05	63.41	64.88	66.62	67.80	69.98	72.58
State	600.26	618.43	647.90	681.36	722.46	742.34	740.16	722.17	687.39	708.61	723.69	745.80	762.98	790.34	820.32

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v 1.5.

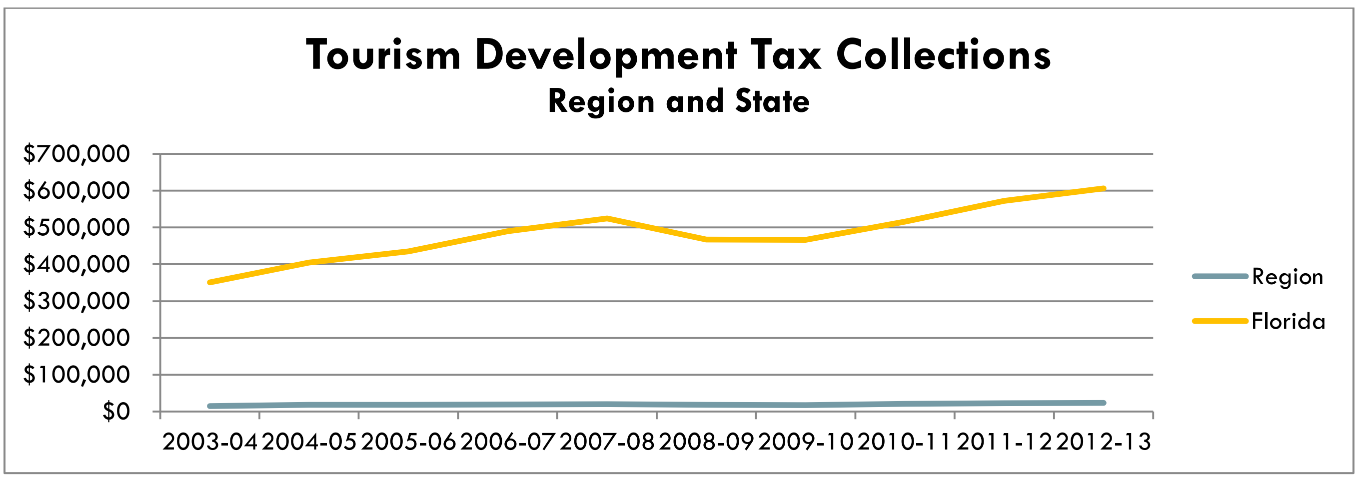


Tourism Development Tax Collections

Exhibit 5– Tourism Development (Bed) Tax Collections
Northeast Florida Region and State, Thousands of Dollars, 2003-04 to 2012-13

AREA	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
Baker	$30	$34	$32	$35	$27	$24	$20	$17	$24	$31
Clay	$358	$373	$379	$387	$439	$475	$434	$431	$461	$469
Duval	$8,373	$10,184	$9,910	$10,394	$11,211	$9,813	$9,147	$9,561	$10,066	$10,739
Flagler	$381	$611	$782	$879	$909	$808	$814	$1,143	$1,491	$1,590
Nassau	$1,383	$1,523	$1,566	$1,617	$1,606	$1,874	$2,174	$2,946	$3,035	$3,387
Putnam	$109	$117	$112	$114	$185	$217	$188	$215	$246	$259
St Johns	$4,416	$4,954	$5,239	$5,437	$5,540	$4,760	$4,796	$6,375	$6,944	$7,278
Region	$15,049	$17,797	$18,019	$18,863	$19,917	$17,970	$17,573	$20,688	$22,268	$23,753
Florida	$350,471	$404,583	$435,183	$489,629	$524,408	$467,089	$466,221	$515,845	$572,655	$605,844

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.*

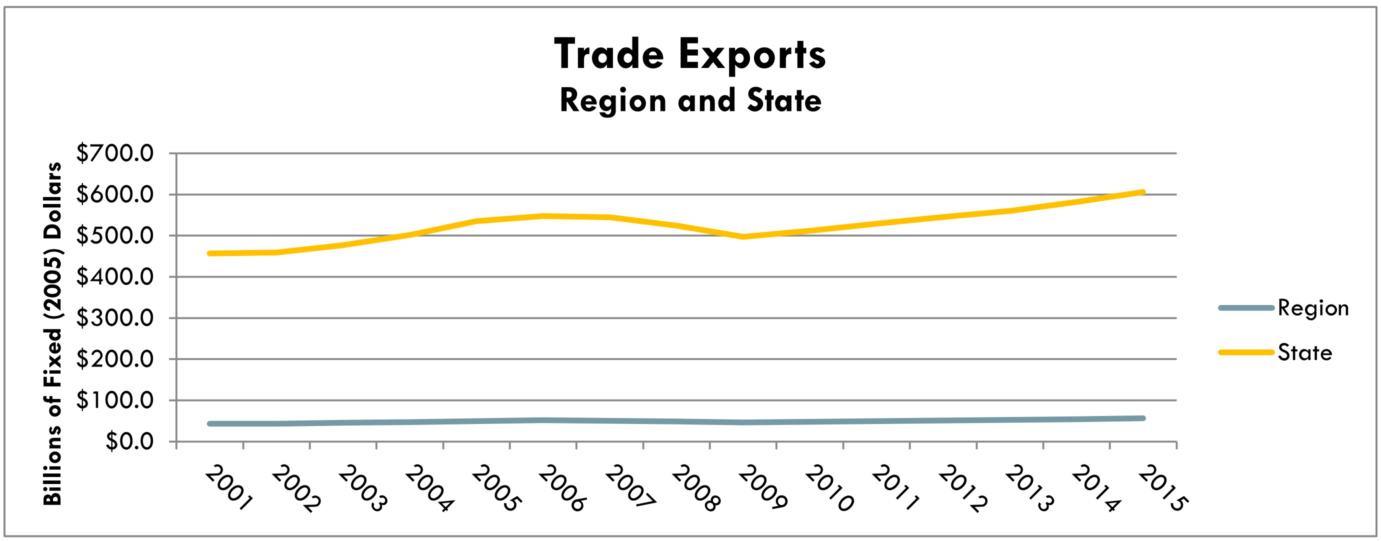


Trade Exports and Imports

Exhibit 6 – Trade Exports
Northeast Florida Region and State, Billions of Fixed 2005 Dollars, 2001-2015

Region	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Baker	0.36	0.40	0.43	0.46	0.49	0.50	0.51	0.49	0.46	0.47	0.48	0.50	0.51	0.53	0.55
Clay	2.18	2.18	2.32	2.42	2.64	2.94	2.91	2.88	2.65	2.68	2.72	2.80	2.87	2.98	3.10
Duval	33.70	33.75	34.94	36.57	37.74	39.55	38.90	37.79	35.81	37.34	38.97	40.13	41.18	42.75	44.53
Flagler	1.27	1.48	2.21	1.76	1.81	1.68	1.40	1.25	1.16	1.16	1.15	1.18	1.21	1.25	1.30
Nassau	1.48	1.46	1.53	1.55	1.58	1.60	1.61	1.58	1.41	1.40	1.43	1.48	1.52	1.57	1.63
Putnam	1.59	1.68	1.77	1.85	1.93	1.89	1.84	1.77	1.71	1.78	1.75	1.80	1.85	1.92	1.99
St. Johns	2.61	2.67	2.81	2.97	3.21	3.43	3.34	3.18	3.00	3.09	3.20	3.30	3.39	3.51	3.65
Region	43.18	43.61	46.02	47.58	49.39	51.58	50.51	48.94	46.20	47.93	49.70	51.18	52.54	54.52	56.76
State	456.42	459.16	476.59	501.71	535.63	547.44	544.62	524.75	497.06	511.71	529.01	545.00	560.30	581.89	605.91

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.5

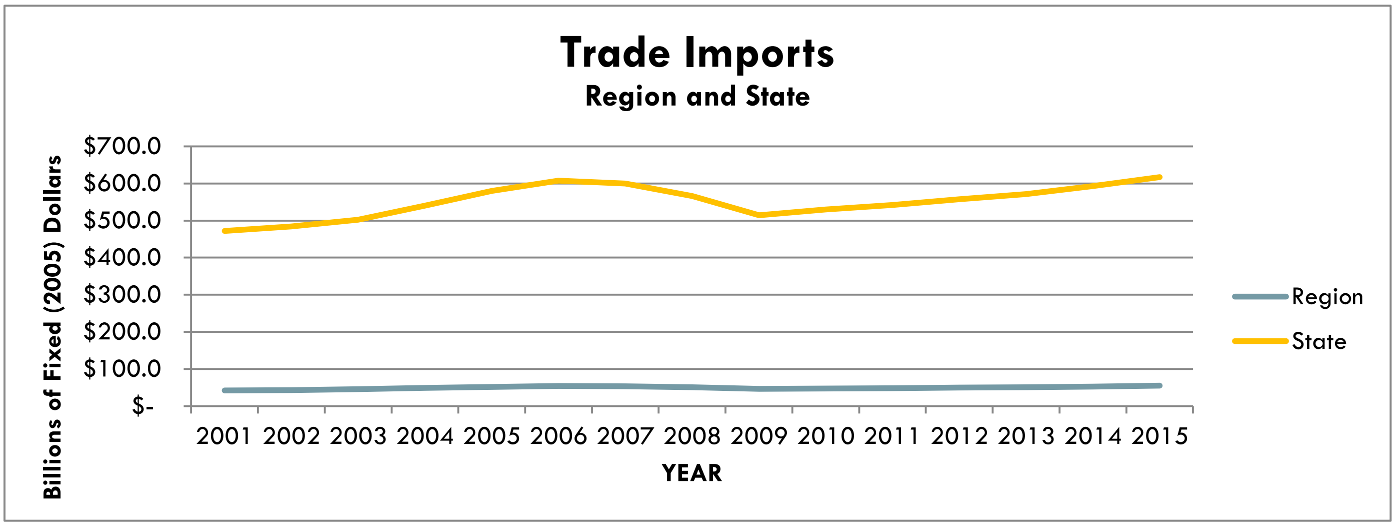


Trade Exports and Imports

Exhibit 7 – Trade Imports
Northeast Florida Region and State, Billions of Fixed 2005 Dollars, 2001 to 2015

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Baker	$0.62	$0.65	$0.73	$0.75	$0.82	$0.86	$0.87	$0.81	$0.74	$0.72	$0.72	$0.74	$0.75	$0.78	$0.81
Clay	$4.15	$4.28	$4.60	$4.85	$5.31	$5.60	$5.52	$5.26	$4.89	$4.89	$4.98	$5.14	$5.28	$5.49	$5.73
Duval	$26.07	$26.96	$28.36	$30.15	$31.35	$32.94	$32.32	$30.41	$27.67	$27.92	$28.30	$29.02	$29.45	$30.36	$31.52
Flagler	$1.58	$1.72	$2.08	$2.16	$2.44	$2.57	$2.54	$2.45	$2.26	$2.32	$2.39	$2.48	$2.56	$2.67	$2.78
Nassau	$2.32	$2.37	$2.47	$2.65	$2.78	$2.93	$3.00	$2.89	$2.68	$2.77	$2.82	$2.92	$2.99	$3.09	$3.20
Putnam	$2.16	$2.16	$2.32	$2.20	$2.35	$2.36	$2.32	$2.23	$2.13	$2.25	$2.24	$2.27	$2.31	$2.37	$2.45
St. Johns	$4.79	$4.93	$5.26	$5.85	$6.31	$6.81	$6.97	$6.91	$6.31	$6.69	$6.96	$7.22	$7.44	$7.76	$8.10
Region	$41.68	$43.08	$45.83	$48.62	$51.35	$54.06	$53.53	$50.97	$46.69	$47.58	$48.40	$49.78	$50.77	$52.53	$54.60
State	$471.9	$484.1	$502.1	$539.8	$579.7	$607.3	$599.4	$565.6	$514.3	$529.6	$541.7	$557.0	$571.0	$592.9	$616.8

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



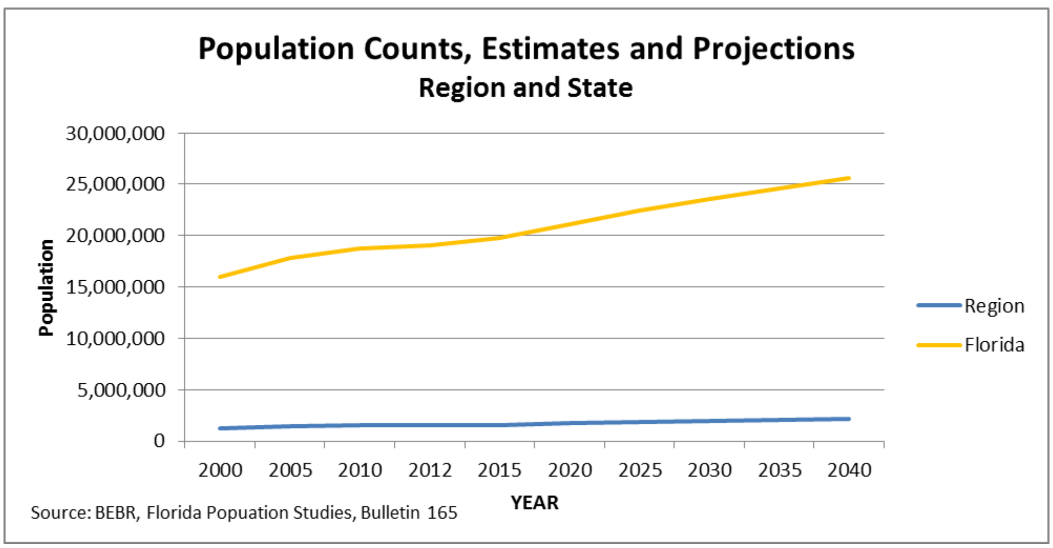
Infrastructure & Growth Leadership

Population Counts, Estimates and Projections

Exhibit 8 – Population Counts, Estimates, and Projections
Northeast Florida Region and State, 2000 to 2040

AREA	CENSUS 2000	ESTIMATE 2005	CENSUS 2010	ESTIMATE 2012	PROJECTIONS					
					2015	2020	2025	2030	2035	2040
Baker	22,259	23,953	27,115	26,938	28,300	30,500	32,500	34,200	35,700	37,100
Clay	140,814	169,623	190,865	192,071	203,500	226,800	248,500	268,700	286,500	302,200
Duval	778,879	861,150	864,263	869,729	889,800	930,700	969,700	1,005,900	1,036,000	1,063,700
Flagler	49,832	78,617	95,696	97,160	107,400	128,000	147,300	165,200	181,500	195,700
Nassau	57,663	65,759	73,314	73,745	77,600	85,500	92,900	99,400	105,500	111,300
Putnam	70,423	73,764	74,364	73,158	73,500	74,400	74,900	75,600	76,100	76,600
St Johns	123,135	157,278	190,039	196,071	213,500	247,500	279,800	309,600	336,700	362,100
Region	1,243,005	1,430,144	1,515,656	1,528,872	1,593,600	1,723,400	1,845,600	1,958,600	2,058,000	2,148,700
Florida	15,982,400	17,865,737	18,801,310	19,074,434	19,750,600	21,141,300	22,434,000	23,601,100	24,639,500	25,583,200

Source: Bureau of Economic and Business Research, Florida Population Studies, Bulletin 165, March 2013.

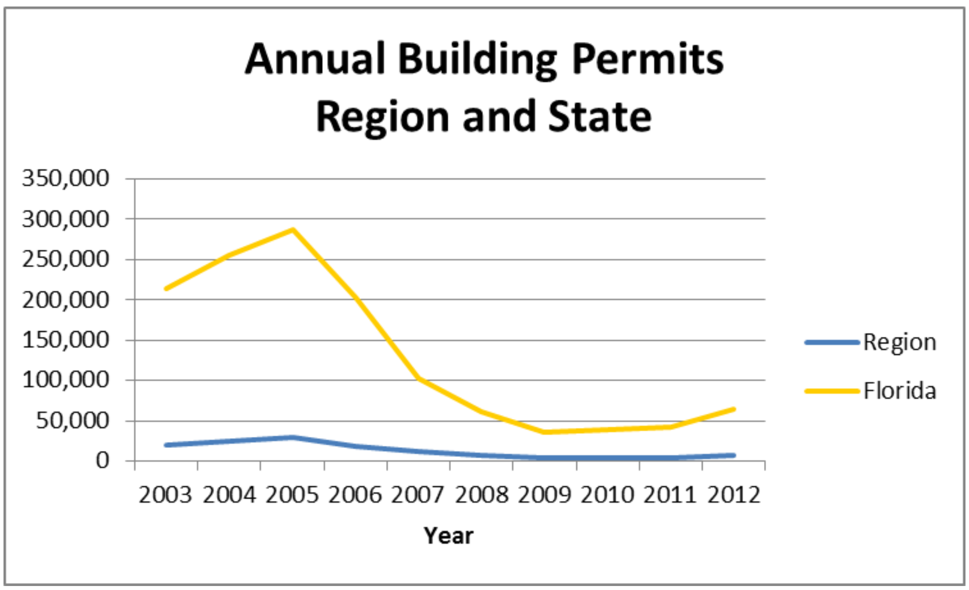


Annual Building Permits

Exhibit 9 – Annual Building Permits
Northeast Florida Region and State, Residential Building Permits, 2003 to 2012

AREA	YEAR									
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Baker	149	206	279	226	165	92	46	35	29	29
Clay	2,553	3,148	4,113	2,412	1,033	745	532	551	475	695
Duval	8,399	9,661	13,507	10,083	6,330	4,271	2,694	1,501	1,589	3,939
Flagler	4,305	5,208	3,985	1,839	567	648	168	278	152	243
Nassau	799	1,287	1,471	1,236	938	485	252	251	327	313
Putnam	337	232	294	339	54	58	36	36	36	36
St Johns	3,921	5,024	5,718	3,010	2,462	1,370	1,142	1,268	1,491	2,190
Region	20,463	24,766	29,367	19,145	11,549	7,669	4,870	3,920	4,099	7,445
Florida	213,567	255,893	287,250	203,238	102,551	61,042	35,329	38,679	42,360	64,810

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

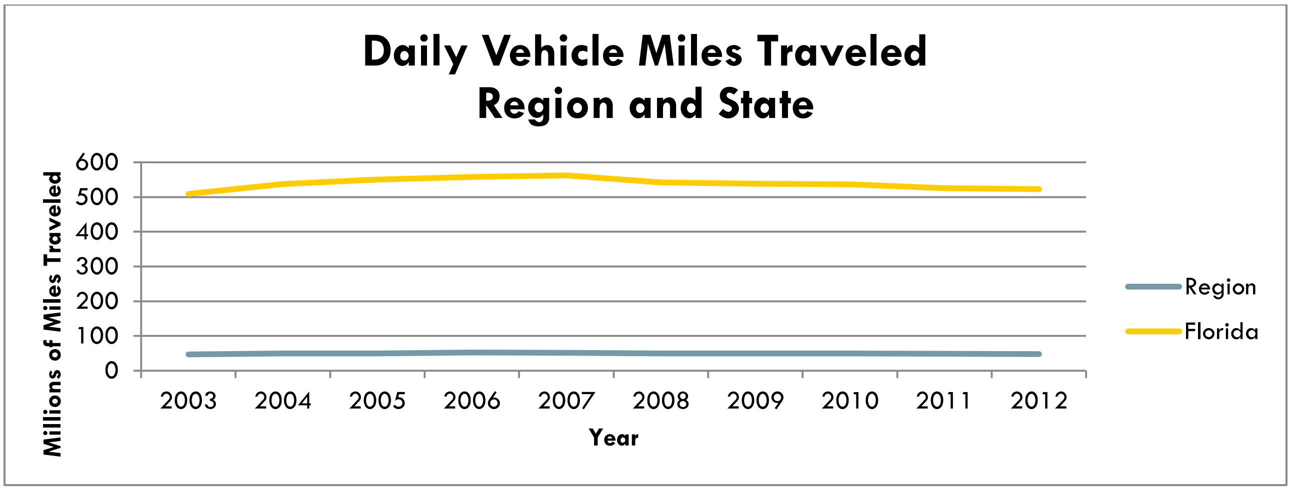


Vehicle Miles Traveled

Exhibit 10 – Daily Vehicle Miles Traveled
Northeast Florida Region and State, Millions of Miles, 2003 to 2012

AREA	YEAR									
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Baker	1.56	1.64	1.64	1.70	1.60	1.57	1.61	1.61	1.53	1.48
Clay	3.98	4.50	4.65	4.60	4.60	4.53	4.40	4.37	4.18	4.15
Duval	28.14	28.89	29.12	30.56	30.45	29.16	28.84	28.72	27.77	27.34
Flagler	2.47	2.73	2.80	3.43	3.12	2.91	3.00	2.91	3.01	2.84
Nassau	2.73	2.72	2.76	2.95	2.89	2.86	2.87	2.77	2.81	2.85
Putnam	2.83	2.91	2.95	2.87	2.87	2.75	2.72	2.76	2.64	2.64
St Johns	5.39	5.93	5.91	6.04	6.16	5.96	6.02	6.18	6.28	6.33
Region	47.10	49.31	49.82	52.14	51.70	49.74	49.45	49.31	48.22	47.63
Florida	508.61	537.49	550.61	558.31	562.80	542.33	538.09	536.32	525.63	522.88

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



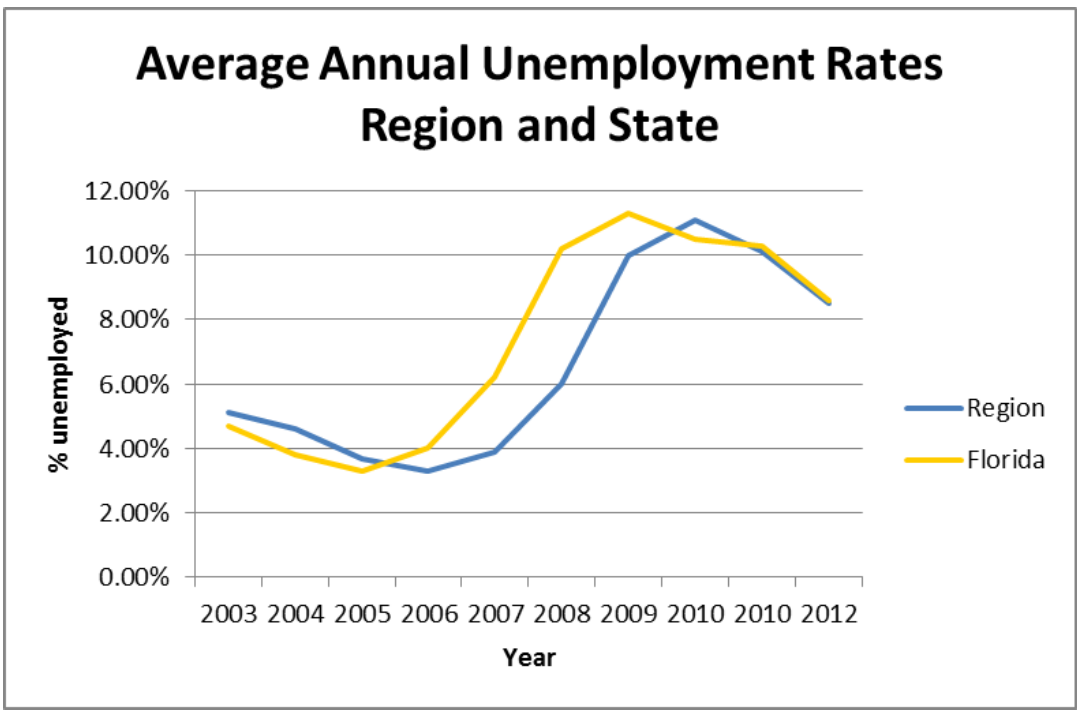
Business Climate & Competitiveness

Average Annual Unemployment Rates

Exhibit 11– Average Annual Unemployment Rates
Northeast Florida Region and State, 2003 to 2012

	YEAR									
AREA	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2010**	**2012**
Baker	4.7%	3.9%	3.2%	2.8%	3.5%	5.6%	9.8%	10.5%	9.8%	7.8%
Clay	4.5%	4.2%	3.4%	2.9%	3.4%	5.2%	9.0%	10.1%	9.1%	7.6%
Duval	5.3%	4.9%	3.9%	3.5%	4.0%	6.1%	10.2%	11.5%	10.4%	8.8%
Flagler	5.6%	5.1%	4.3%	4.4%	6.3%	9.5%	14.3%	15.1%	13.5%	11.6%
Nassau	4.8%	4.0%	3.3%	2.8%	3.2%	5.3%	9.3%	10.4%	9.4%	7.7%
Putnam	5.6%	5.2%	4.2%	3.6%	4.6%	7.3%	11.4%	12.4%	11.7%	11.2%
St Johns	4.2%	3.6%	3.0%	2.7%	3.1%	4.9%	8.1%	9.2%	8.3%	6.9%
Region	5.1%	4.6%	3.7%	3.3%	3.9%	6.0%	10.0%	11.1%	10.1%	8.5%
Florida	4.7%	3.8%	3.3%	4.0%	6.2%	10.2%	11.3%	10.5%	10.3%	8.6%

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

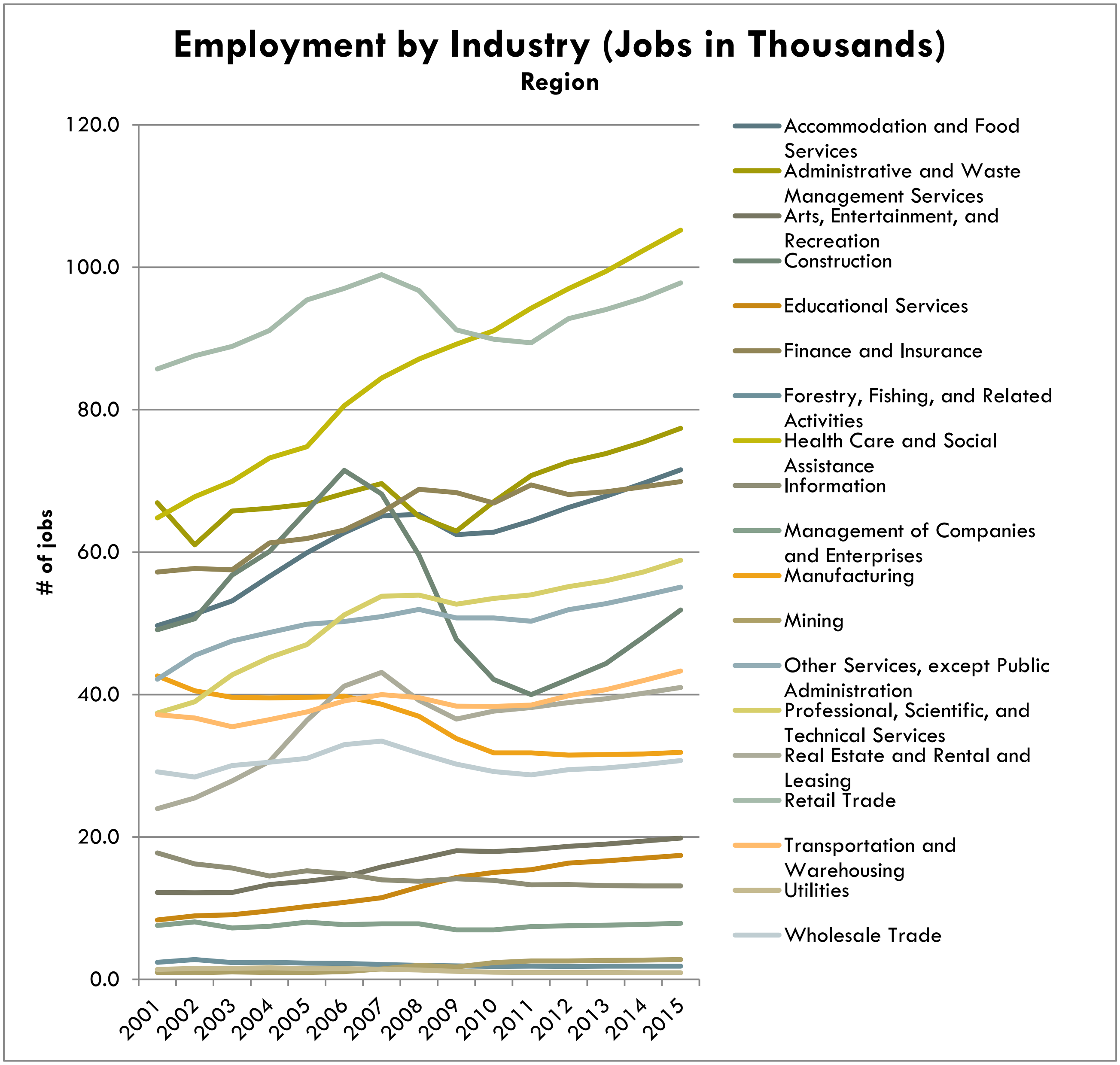


Employment by Industry

Exhibit 12 – Employment by Industry
Northeast Florida Region, Thousands (jobs), 2001-2015

	YEAR														
INDUSTRY	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Accommodation and Food Services	49.7	51.3	53.1	56.6	59.9	62.7	65.1	65.3	62.4	62.8	64.4	66.3	67.8	69.7	71.6
Administrative and Waste Management Services	66.9	61.0	65.8	66.2	66.8	68.2	69.6	65.0	62.9	67.1	70.7	72.6	73.8	75.4	77.4
Arts, Entertainment, and Recreation	12.2	12.2	12.2	13.3	13.8	14.4	15.8	16.9	18.1	18.0	18.2	18.7	19.0	19.4	19.8
Construction	49.1	50.7	56.8	60.1	65.8	71.5	68.1	59.5	47.7	42.1	40.0	42.2	44.4	48.1	51.9
Educational Services	8.3	8.9	9.1	9.6	10.2	10.8	11.5	13.0	14.3	15.0	15.4	16.3	16.7	17.0	17.4
Finance and Insurance	57.2	57.7	57.5	61.3	61.9	63.1	65.6	68.8	68.4	66.9	69.4	68.1	68.5	69.2	69.9
Forestry, Fishing, and Related Activities	2.4	2.8	2.3	2.4	2.3	2.2	2.1	2.0	1.9	1.8	1.9	1.8	1.9	1.9	1.9
Health Care and Social Assistance	64.8	67.8	69.9	73.2	74.8	80.6	84.5	87.1	89.2	91.1	94.2	97.0	99.4	102.4	105.2
Information	17.8	16.2	15.6	14.5	15.3	14.8	14.0	13.8	14.1	13.9	13.3	13.3	13.2	13.1	13.1
Management of Companies and Enterprises	7.6	8.1	7.2	7.5	8.1	7.7	7.8	7.8	7.0	7.0	7.4	7.5	7.6	7.7	7.9
Manufacturing	42.6	40.5	39.6	39.5	39.6	39.7	38.7	36.9	33.8	31.8	31.8	31.5	31.6	31.6	31.9
Mining	1.0	0.9	1.1	1.0	1.0	1.1	1.5	2.0	1.7	2.3	2.6	2.6	2.7	2.7	2.8
Other Services, except Public Administration	42.1	45.5	47.5	48.7	49.9	50.2	50.9	51.9	50.8	50.7	50.3	51.9	52.8	53.9	55.1
Professional, Scientific, and Technical Services	37.4	39.0	42.8	45.2	47.0	51.2	53.8	54.0	52.7	53.5	54.0	55.2	56.0	57.2	58.9
Real Estate and Rental and Leasing	24.0	25.5	27.9	30.6	36.3	41.2	43.1	39.2	36.5	37.7	38.2	38.9	39.4	40.2	41.0
Retail Trade	85.7	87.6	88.9	91.1	95.4	97.0	99.0	96.7	91.2	89.9	89.4	92.8	94.1	95.7	97.8
Transportation and Warehousing	37.2	36.7	35.5	36.5	37.5	39.1	40.0	39.6	38.4	38.3	38.5	39.8	40.7	41.9	43.3
Utilities	1.4	1.5	1.5	1.6	1.5	1.5	1.5	1.3	1.1	1.0	1.0	1.0	1.0	0.9	0.9
Wholesale Trade	29.1	28.4	30.0	30.5	31.1	33.0	33.5	31.8	30.2	29.2	28.7	29.5	29.7	30.2	30.7

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.5

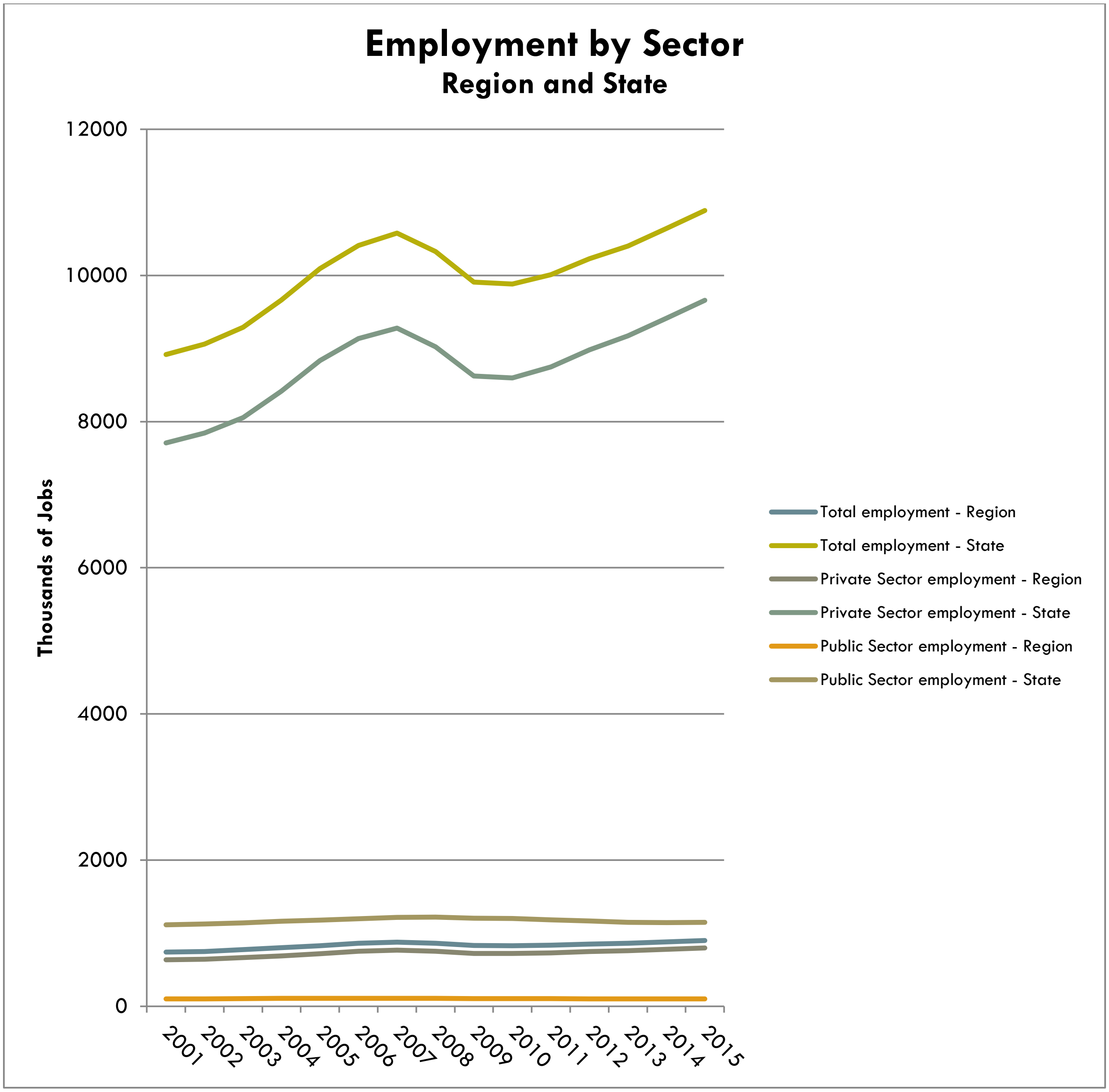

Employment by Industry (Jobs in Thousands)
Region
# of jobs
120.0
100.0
80.0
60.0
40.0
20.0
0.0
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
Accommodation and Food Services
Administrative and Waste Management Services
Arts, Entertainment, and Recreation
Construction
Educational Services
Finance and Insurance
Forestry, Fishing, and Related Activities
Health Care and Social Assistance
Information
Management of Companies and Enterprises
Manufacturing
Mining
Other Services, except Public Administration
Professional, Scientific, and Technical Services
Real Estate and Rental and Leasing
Retail Trade
Transportation and Warehousing
Utilities
Wholesale Trade

Employment by Sector

Exhibit 13 – Employment by Sector
Northeast Florida Region and State, Thousands of Jobs, 2001 to 2015

SECTOR	2001	2002	2003	2004	2005	2006	2007	
Total employment – Region	740.97	747.43	773.35	800.06	827.71	859.98	876.33	
Total employment – State	8917.21	9059.55	9289.26	9664.82	10092.26	10411.34	10580.34	
Private Sector employment – Region	636.46	642.24	664.35	689.42	718.11	750.17	765.89	
Private Sector employment – State	7709.28	7842.92	8053.07	8415.51	8834.30	9134.85	9279.54	
Public Sector employment – Region	100.63	101.58	105.21	107.10	106.54	106.80	107.17	
Public Sector employment – State	1112.16	1124.85	1141.25	1160.91	1177.59	1195.38	1214.17	
SECTOR	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Total employment – Region	862.51	829.84	827.56	835.60	851.41	862.06	879.46	899.64
Total employment – State	10326.70	9909.57	9880.70	10010.57	10228.27	10401.75	10641.91	10889.04
Private Sector employment – Region	752.68	722.49	720.11	729.45	746.95	760.03	778.25	798.40
Private Sector employment – State	9022.57	8625.31	8595.58	8746.84	8980.55	9172.49	9415.48	9661.05
Public Sector employment – Region	106.66	104.35	104.50	103.19	101.56	99.12	98.32	98.35
Public Sector employment – State	1219.84	1204.51	1202.05	1180.84	1166.31	1148.04	1145.48	1147.02

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.5

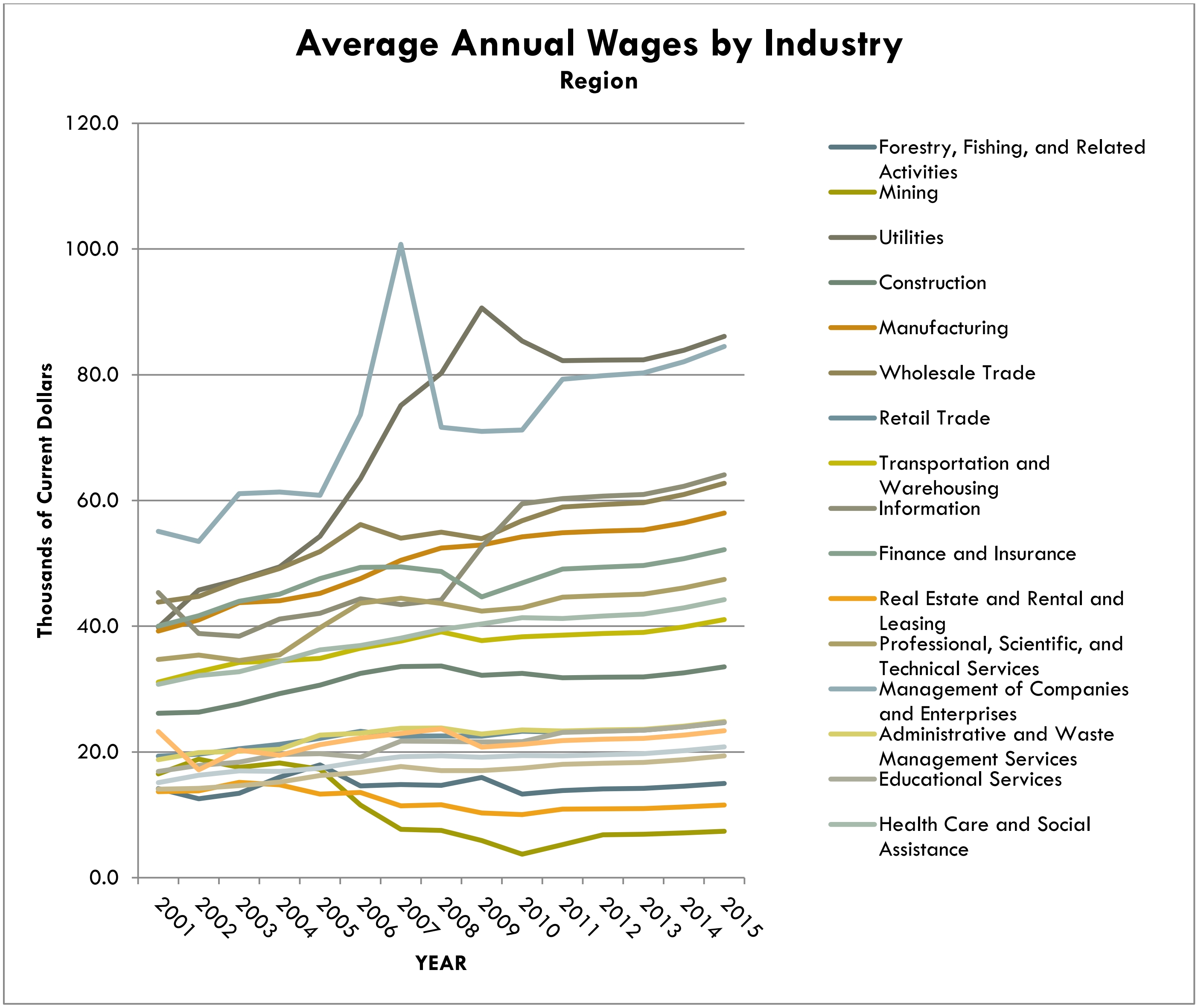

Employment by Sector
Region and State
12000
10000
8000
6000
4000
2000
0
Thousands of Jobs
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
Total employment - Region
Total employment - State
Private Sector employment - Region
Private Sector employment - State
Public Sector employment - Region
Public Sector employment - State

Wages by Industry

Exhibit 14 – Average Annual Wages by Industry
Northeast Florida Region, Thousands of Current Dollars, 2001 to 2015

INDUSTRY	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Forestry, Fishing, and Related Activities	14.2	12.6	13.4	16.0	18.0	14.6	14.8	14.7	15.9	13.3	13.9	14.1	14.2	14.5	15.0
Mining	16.5	18.9	17.6	18.3	17.2	11.6	7.7	7.5	5.9	3.7	5.2	6.8	6.9	7.1	7.4
Utilities	39.8	45.7	47.4	49.4	54.3	63.5	75.1	80.2	90.6	85.4	82.3	82.3	82.4	83.9	86.1
Construction	26.1	26.3	27.7	29.3	30.6	32.5	33.6	33.7	32.2	32.5	31.8	31.9	31.9	32.6	33.5
Manufacturing	39.3	41.0	43.8	44.0	45.2	47.6	50.5	52.4	52.9	54.2	54.9	55.2	55.3	56.4	58.0
Wholesale Trade	43.8	44.7	47.2	49.2	51.9	56.2	54.0	54.9	53.9	56.8	59.0	59.4	59.6	61.0	62.7
Retail Trade	19.3	19.7	20.5	21.2	22.2	23.3	22.5	22.5	22.5	23.3	23.2	23.3	23.5	24.0	24.7
Transportation and Warehousing	31.1	32.8	34.3	34.5	34.9	36.5	37.6	39.1	37.7	38.3	38.6	38.8	39.0	39.9	41.0
Information	45.4	38.8	38.4	41.1	42.1	44.4	43.4	44.2	52.6	59.5	60.3	60.7	60.9	62.3	64.1
Finance and Insurance	40.0	41.7	44.0	45.1	47.6	49.4	49.5	48.7	44.7	46.9	49.1	49.4	49.6	50.7	52.2
Real Estate and Rental and Leasing	13.7	13.8	15.2	14.8	13.3	13.6	11.4	11.6	10.3	10.1	10.9	11.0	11.0	11.2	11.6
Professional, Scientific, and Technical Services	34.7	35.4	34.6	35.5	39.7	43.7	44.5	43.6	42.4	42.9	44.6	44.9	45.1	46.1	47.4
Management of Companies and Enterprises	55.1	53.5	61.1	61.3	60.8	73.7	100.8	71.6	71.0	71.2	79.3	79.9	80.3	82.1	84.5
Administrative and Waste Management Services	18.8	19.9	20.1	20.4	22.7	23.0	23.8	23.8	22.9	23.5	23.3	23.5	23.6	24.1	24.8
Educational Services	16.9	17.8	18.4	19.6	19.7	19.2	21.7	21.7	21.6	21.6	23.1	23.3	23.5	24.0	24.7
Health Care and Social Assistance	30.8	32.1	32.8	34.4	36.2	36.9	38.1	39.5	40.4	41.4	41.2	41.6	41.9	42.9	44.2
Arts, Entertainment, and Recreation	23.3	17.2	20.3	19.5	21.2	22.2	22.9	23.7	20.8	21.2	21.8	22.0	22.2	22.7	23.4
Accommodation and Food Services	14.1	14.2	14.6	15.2	16.3	16.7	17.7	17.1	17.0	17.4	18.0	18.2	18.3	18.8	19.4
Other Services, except Public Administration	15.1	16.3	17.0	16.9	17.4	18.5	19.3	19.4	19.2	19.4	19.4	19.6	19.7	20.2	20.8

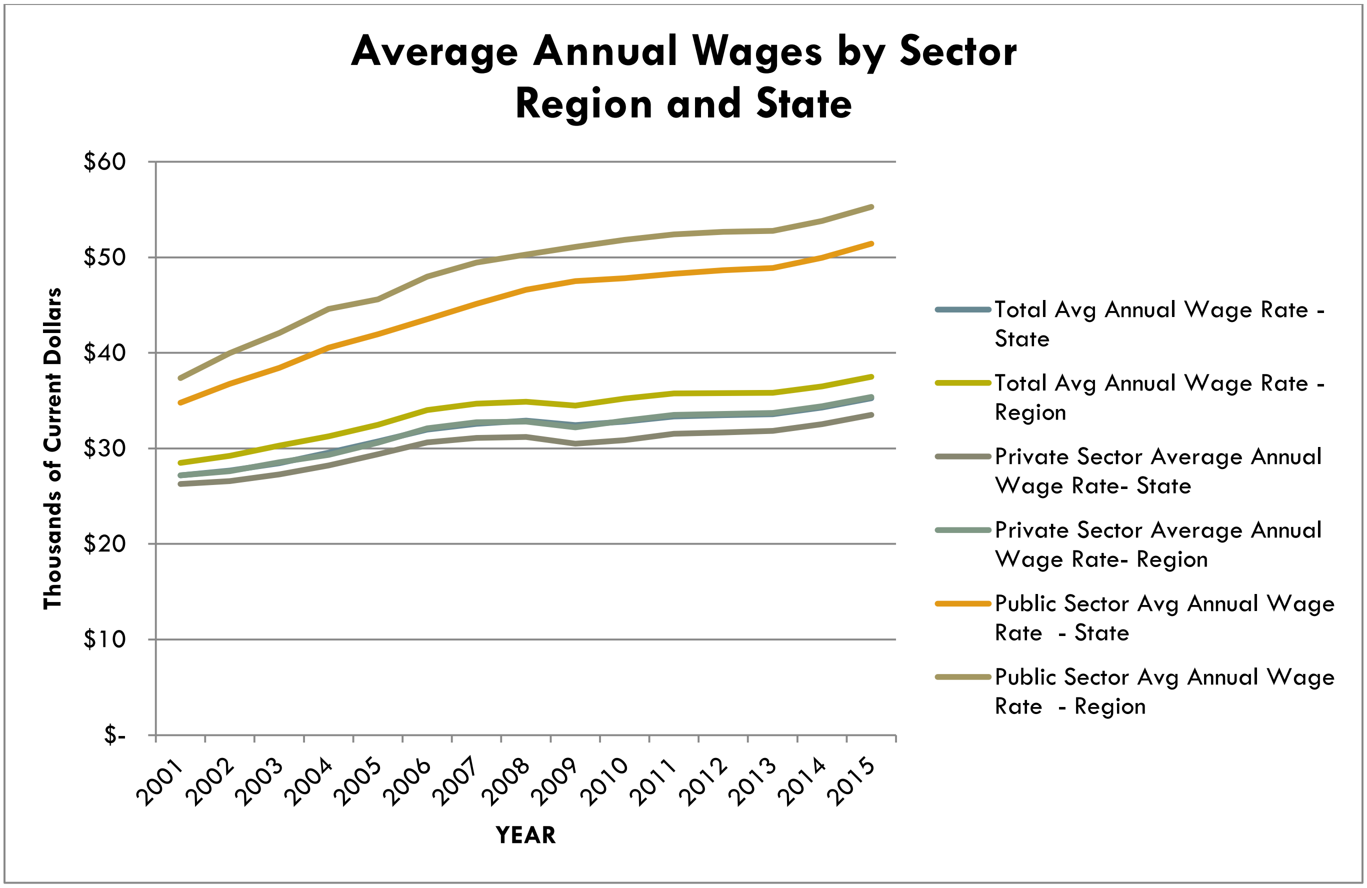
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.5



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v 1.5

Exhibit 15 – Average Annual Wages by Sector
Northeast Florida Region, Thousands of Current Dollars, 2001 to 2015

SECTOR	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Avg Annual Wage Rate - State	$27.17	$27.69	$28.47	$29.54	$30.74	$31.99	$32.58	$32.90	$32.45	$32.81	$33.35	$33.47	$33.58	$34.29	$35.26
Total Avg Annual Wage Rate - Region	$28.49	$29.23	$30.30	$31.28	$32.46	$34.01	$34.69	$34.89	$34.50	$35.22	$35.74	$35.79	$35.83	$36.51	$37.49
Private Sector Average Annual Wage Rate- State	$26.28	$26.59	$27.28	$28.21	$29.41	$30.62	$31.11	$31.22	$30.50	$30.88	$31.53	$31.68	$31.84	$32.56	$33.52
Private Sector Average Annual Wage Rate- Region	$27.19	$27.63	$28.56	$29.32	$30.60	$32.10	$32.73	$32.80	$32.20	$32.91	$33.50	$33.60	$33.72	$34.43	$35.40
Public Sector Avg Annual Wage Rate - State	$34.77	$36.75	$38.44	$40.54	$41.96	$43.52	$45.15	$46.61	$47.51	$47.83	$48.29	$48.66	$48.89	$49.97	$51.44
Public Sector Avg Annual Wage Rate - Region	$37.38	$39.97	$42.09	$44.60	$45.61	$48.00	$49.45	$50.30	$51.09	$51.83	$52.40	$52.68	$52.77	$53.80	$55.30



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.5

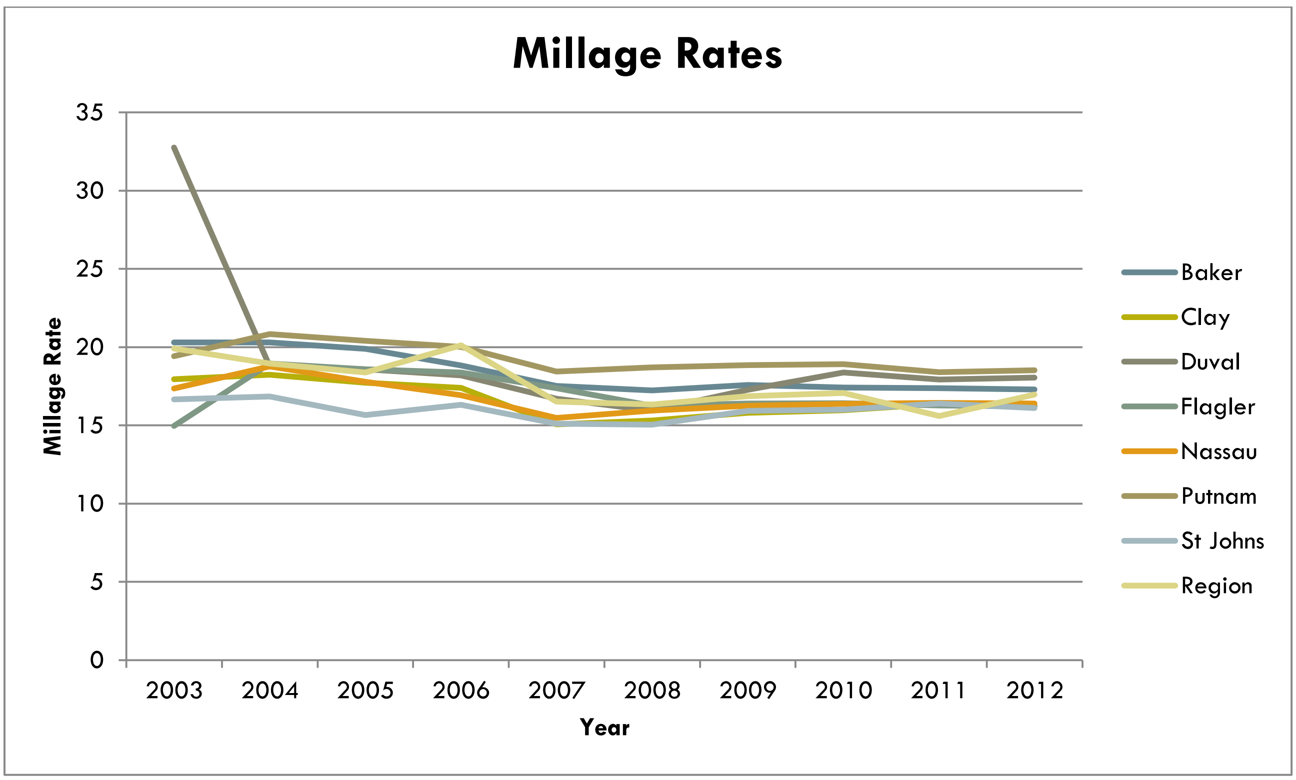
Civic & Governance Systems

Total Millage Rates

Exhibit 16 – Total Millage Rates
Northeast Florida Region and State, 2003 to 2012

	YEAR									
AREA	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Baker	20.29	20.29	19.88	18.83	17.51	17.24	17.58	17.42	17.38	17.29
Clay	17.95	18.24	17.72	17.40	15.06	15.31	15.81	15.97	16.38	16.24
Duval	32.74	18.76	18.59	18.19	16.69	15.94	17.28	18.37	7.9	18.05
Flagler	14.96	18.94	18.58	18.37	17.38	16.24	16.39	16.41	16.27	16.21
Nassau	17.36	18.76	17.78	16.92	15.48	15.94	16.25	16.37	16.43	16.40
Putnam	19.42	20.84	20.40	20.01	18.43	18.70	18.84	18.91	18.40	18.51
St Johns	16.65	16.85	15.65	16.32	15.11	15.05	15.92	16.00	16.39	16.10
Region	19.91	18.95	18.37	20.12	16.52	16.34	16.87	17.06	15.60	16.97
Florida	18.96	18.65	18.20	17.56	16.24	16.42	17.05	17.37	17.22	17.32

Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections; Florida Ad Valorem Valuation and Tax Data 2001 to 2012; Millage and Taxes Levied Report. http://dor.myflorida.com/dor/property/resources/data.html

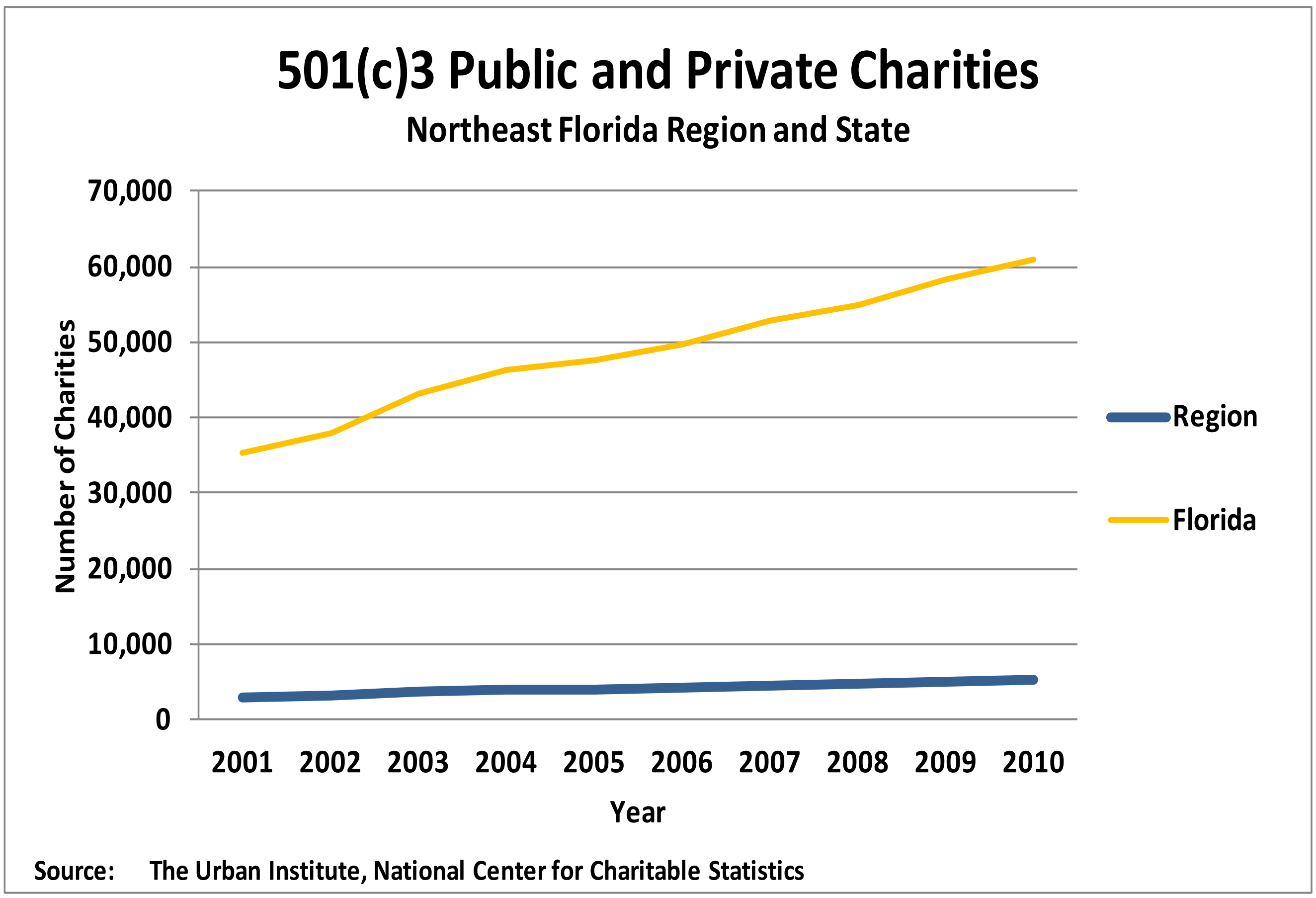


Registered Nonprofit Organizations

Exhibit 17– Registered 501(c)3 Organizations
Public and Private Foundation Charities Northeast Florida Region and State, 2001 to 2010

	YEAR									
AREA	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Baker	30	27	36	40	41	39	41	41	48	54
Clay	183	204	258	287	294	312	33	361	381	415
Duval	2,007	2,176	2,461	2,598	2,649	2,757	2,913	3,193	3,334	3,549
Flagler	75	87	105	120	131	130	144	168	198	226
Nassau	128	145	169	186	184	209	221	240	257	275
Putnam	147	154	168	181	184	190	202	207	222	228
St Johns	328	367	440	475	496	510	548	582	645	683
Region	2,898	3,160	3,637	3,887	3,979	4,147	4,402	4,792	5,085	5,430
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

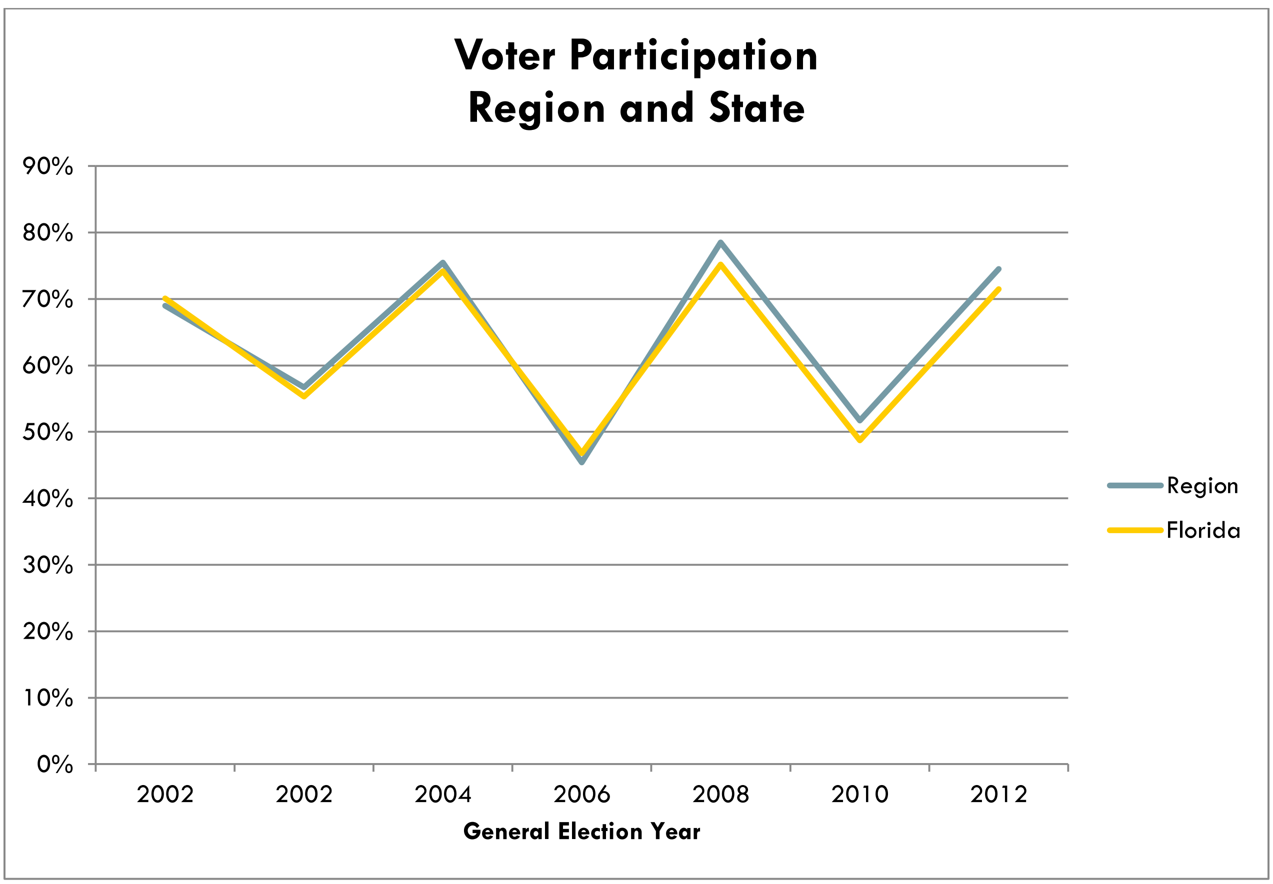


Voter Participation

Exhibit 18 – Voter Participation
Northeast Florida Region and State Biennial General Elections, 2002-2012

	YEAR						
AREA	2002	2002	2004	2006	2008	2010	2012
Baker	67.2%	57.0%	78.0%	49.1%	78.7%	58.2%	81.8%
Clay	66.5%	60.8%	76.8%	46.0%	78.6%	52.9%	73.2%
Duval	68.8%	54.6%	74.1%	42.3%	77.8%	50.4%	74.3%
Flagler	81.3%	66.7%	81.9%	60.1%	82.2%	52.1%	73.0%
Nassau	72.2%	56.4%	79.4%	51.4%	81.2%	54.9%	79.0%
Putnam	65.4%	54.9%	68.5%	47.1%	71.9%	49.5%	72.4%
St Johns	68.5%	60.1%	79.0%	49.1%	80.8%	54.4%	75.5%
Region	69.0%	56.7%	75.5%	45.4%	78.5%	51.7%	74.5%
Florida	70.1%	55.3%	74.2%	46.8%	75.2%	48.7%	71.5%

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



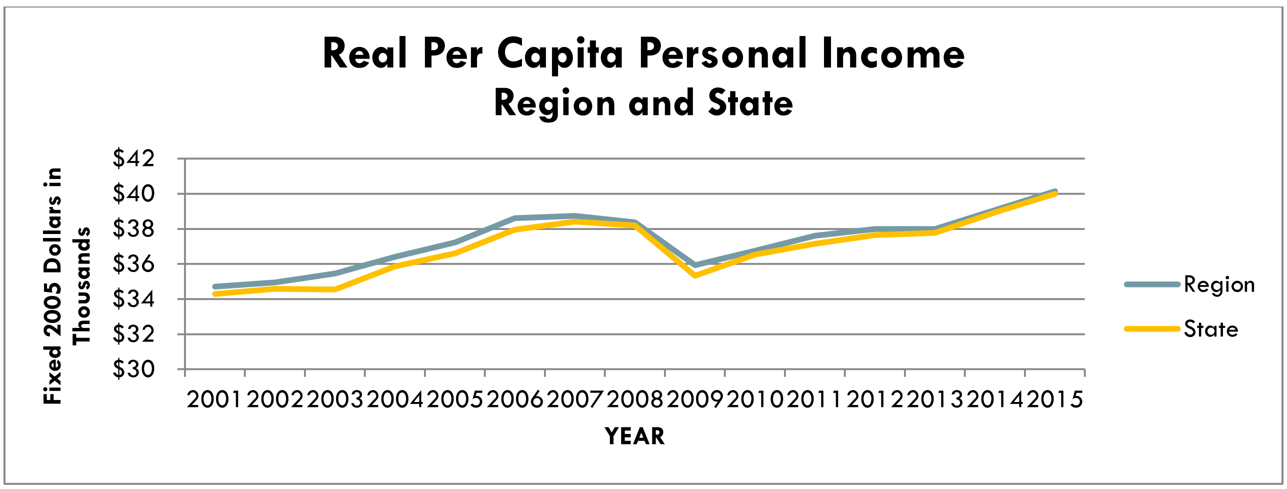
Quality of Life & Quality Places

Per Capita Income

Exhibit 19 – Real Personal per Capita Income
Northeast Florida Region and State Fixed 2005 Dollars, 2001 to 2010

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Baker	$23.49	$23.83	$24.48	$25.09	$24.83	$25.12	$25.38	$24.21	$23.37	$23.40	$24.00	$24.18	$24.30	$25.08	$25.96
Clay	$31.99	$32.06	$32.36	$32.28	$33.16	$33.08	$33.04	$32.45	$30.93	$30.79	$31.54	$32.05	$32.31	$33.43	$34.56
Duval	$35.83	$36.27	$37.04	$37.82	$38.72	$40.42	$40.42	$39.88	$37.53	$38.17	$38.90	$39.06	$38.86	$39.78	$40.77
Flagler	$27.06	$27.07	$27.25	$28.08	$28.81	$29.64	$29.77	$30.06	$28.14	$29.11	$30.18	$30.76	$31.08	$32.24	$33.20
Nassau	$36.15	$36.25	$36.57	$39.06	$40.35	$42.16	$43.11	$42.83	$39.33	$41.20	$42.51	$43.41	$43.66	$45.08	$46.35
Putnam	$22.20	$22.45	$23.04	$22.86	$23.29	$23.63	$24.24	$24.60	$24.22	$25.29	$25.45	$25.83	$26.10	$27.10	$28.05
St. Johns	$42.24	$41.54	$41.14	$44.17	$44.94	$47.18	$47.64	$47.63	$42.81	$44.77	$46.19	$46.79	$46.83	$48.19	$49.38
Region	$34.72	$34.94	$35.46	$36.40	$37.23	$38.61	$38.73	$38.37	$35.94	$36.75	$37.61	$37.99	$37.99	$39.07	$40.15
State	$34.29	$34.59	$34.54	$35.87	$36.61	$37.95	$38.41	$38.19	$35.34	$36.54	$37.16	$37.64	$37.78	$38.94	$40.00

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.5

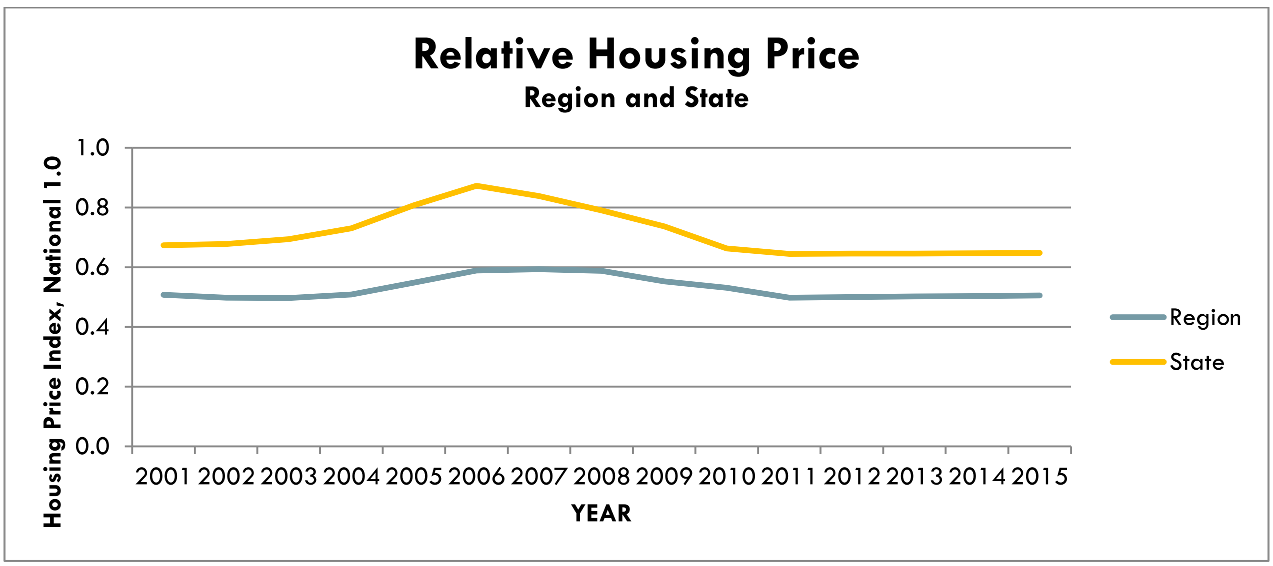


House Price Cost Index

Exhibit 20 – Relative Housing Price
Northeast Florida Region and State National Index = 1.0, 2001 to 2015

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Baker	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.5	0.5	0.4	0.4	0.4	0.4	0.4
Clay	0.7	0.6	0.6	0.6	0.6	0.7	0.7	0.8	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Duval	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.3
Escambia	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.7	0.7	0.7	0.6	0.6	0.6	0.6	0.6
Franklin	0.8	0.8	0.8	0.8	0.9	0.9	0.8	0.8	0.8	0.7	0.7	0.7	0.7	0.7	0.7
Nassau	0.7	0.7	0.7	0.7	0.8	0.9	0.8	0.7	0.9	0.8	0.7	0.7	0.7	0.7	0.7
Putnam	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
St. Johns	1.0	1.0	1.0	1.0	1.1	1.1	1.2	1.2	1.1	1.0	1.0	1.0	1.0	1.0	1.0
Region	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5
State	0.7	0.7	0.7	0.7	0.8	0.9	0.8	0.8	0.7	0.7	0.6	0.6	0.6	0.6	0.6

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.5

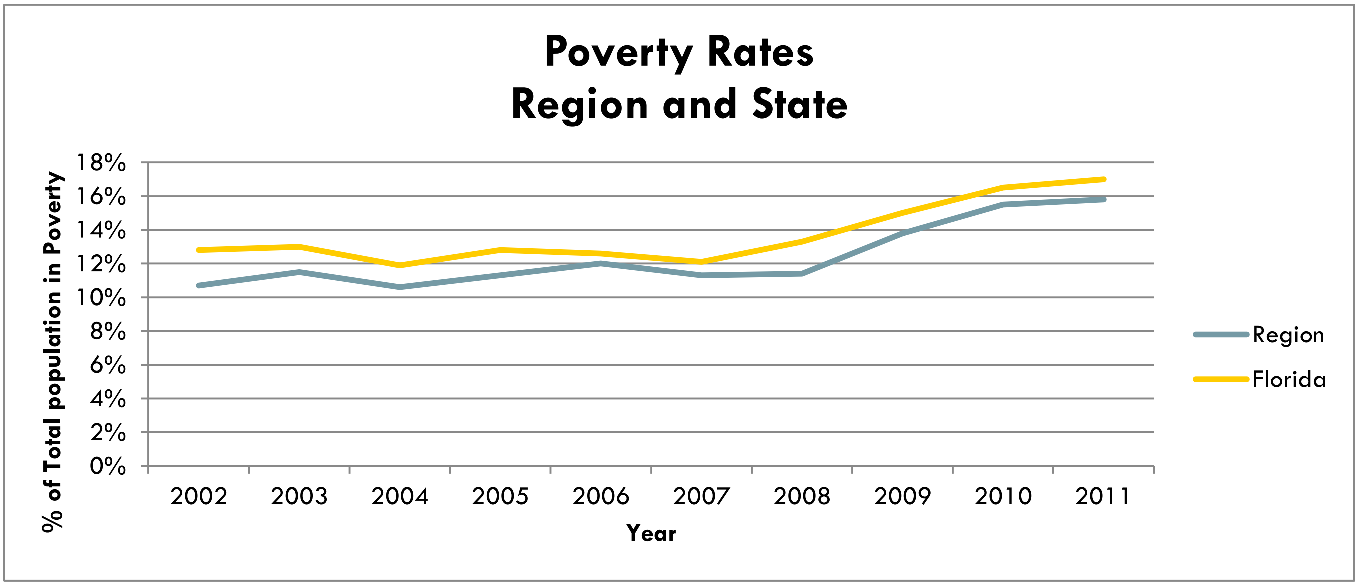


Persons Living in Poverty

Exhibit 21– Percent of Persons Living in Poverty
Northeast Florida Region and State, 2002 to 2011

	YEAR									
AREA	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Baker	13.3%	13.7%	12.7%	14.5%	14.7%	14.4%	15.3%	17.2%	17.5%	18.6%
Clay	6.7%	7.4%	7.1%	8.1%	6.8%	8.0%	8.3%	9.2%	11.3%	10.9%
Duval	11.6%	12.8%	11.7%	12.1%	13.7%	12.4%	12.1%	15.3%	16.6%	17.7%
Flagler	9.0%	8.2%	7.8%	9.6%	8.2%	10.1%	9.8%	11.3%	15.5%	14.7%
Nassau	8.3%	8.9%	8.3%	9.2%	9.4%	8.9%	8.9%	11.5%	11.3%	11.4%
Putnam	19.3%	18.8%	17.3%	20.9%	22.1%	20.2%	23.1%	25.6%	26.7%	27.9%
St Johns	7.5%	8.2%	7.5%	7.5%	7.6%	6.7%	7.9%	8.7%	12.0%	9.4%
Region	10.7%	11.5%	10.6%	11.3%	12.0%	11.3%	11.4%	13.8%	15.5%	15.8%
Florida	12.8%	13.0%	11.9%	12.8%	12.6%	12.1%	13.3%	15.0%	16.5%	17.0%

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

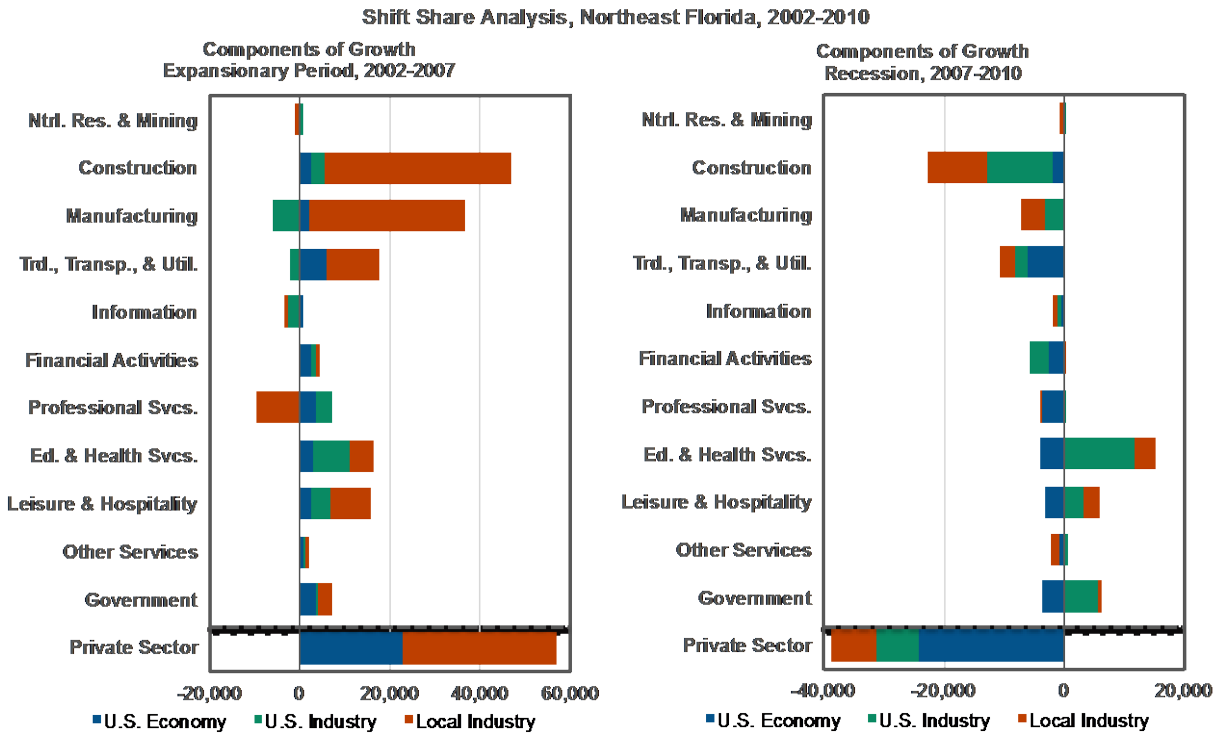


Shift-Share Analysis

The shift-share analysis in the following charts displays the positive and negative growth effects of the three components for Northeast Florida. The orange bars are the most important part of the analysis, indicating the Local Industry Share and when job changes are due to local performance.

Due to significant economic shifts related to the national recession, the Shift-Share Analysis was broken into two periods: the five years of growth leading up to the U.S. recession (2002-2007) and the recessionary period (2007-2010).

Exhibit 22 – Shift Share Analysis



For the pre-recession period (left chart above), we notice that local effects (orange bars) have had a significant effect on positive job growth in many industries, accounting for 60% of private sector job creation from 2002-2007. Construction and Manufacturing had the largest share of locally competitive job creation, followed by Trade, Transportation & Utilities, and Leisure & Hospitality. Regional strengths in Manufacturing stand out in particular, where local competitive advantage accounted for 95% of jobs created. Professional Services was the industry most negatively affected by job losses due to local performance.

During the recession period (2007-2010), only three sectors saw positive job gains, and most industry losses were more attributable to U.S. effects than local performance. The Construction industry lost the most jobs during this period and was most negatively affected by poor local performance. Education (Private) & Health Services and Leisure & Hospitality both enjoyed job growth due to positive U.S. trends and improved local performance.

In summary, Northeast Florida performed extremely well across nearly all industries leading up to the recession, but has fallen faster than the U.S. overall. A telling statistic underscores this point: Northeast Florida's private sector raced ahead pre-recession by creating 35,000 more jobs than U.S. trends would dictate (improving local competitiveness), but lost 10,000 more jobs during the recession due to underperformance.

Location Quotient Analysis[1]

Location Quotients (LQs) compare the relative concentration of an industry in a local economy with the average concentration seen at the national level. An LQ of 1.5 indicates that the local economy has 50% more jobs per capita in that industry than witnessed at the national level. An LQ of 1.0 indicates parity, and an LQ below 1 indicates a below-average concentration. The "bubble chart" on the following page shows LQ by industry on the vertical axis. The horizontal axis shows historic growth rates for the industry, and the size of the bubble indicates the employment base of the sector.

While the shift-share analysis above examined Northeast Florida's major sectors in terms of their jobs growth, location quotients give us a quick snapshot of which industries are concentrated in the region. The bubble chart below shows the LQ of each of the major sectors on the vertical axis, the 5-year % growth for the industry on the horizontal axis, and the relative employment of the industry in the size of the bubble. This bubble chart will be seen again in the next phase's more detailed cluster and sub-cluster analysis.

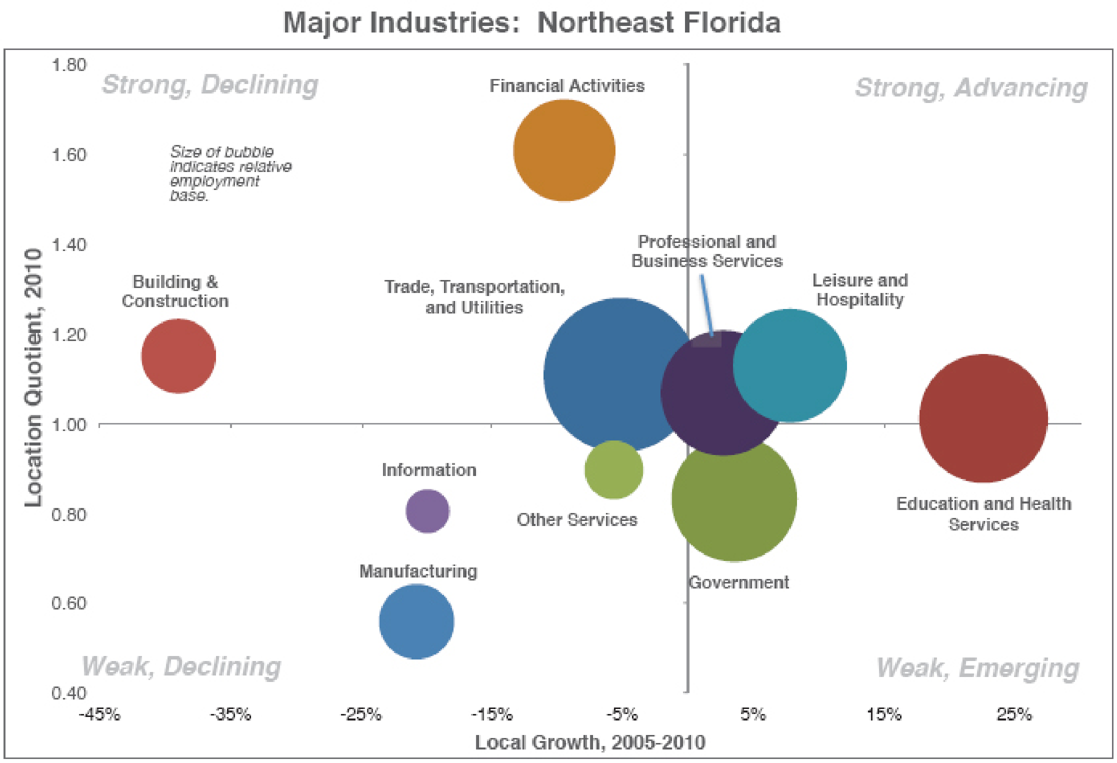
The graph's four quadrants each tell a different story for the industry sector. While sectors in the top-right quadrant are viewed as competitive and should be priorities for talent development, sectors to the bottom-right (which are growing, but have below-average concentrations) are emerging sectors for the region. These sectors typically require special attention such as entrepreneurial assistance or new workforce

[1] Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, 2012

training programs. We characterize each quadrant as follows:

- ***Top-Right (Strong, Advancing)***—A sector in the upper right quadrant is more concentrated in the region than average and also is becoming more concentrated over time due to above-average growth rates. These industries are standouts that distinguish the regional economy and are typically doing better every year. They represent immediate opportunities for economic development (a "build on your strengths" strategy). They are especially important if they are also large in terms of sheer number of jobs. Large industries in this quadrant are both important and high performing, which means they will have increasing workforce demand. Small industries in this quadrant are emerging, may have high-potential regional export capabilities, and should be developed further.
- ***Bottom-Right (Weak, Emerging)***—The lower right quadrant contains industries that are not yet as concentrated in the region as they are at the national level, but they are becoming more concentrated over time. If they continue this trend, they will eventually move across the horizontal axis into the upper right-hand quadrant (You can imagine a counter-clockwise swirl as emerging sectors become strong and then lose their strength as the economy shifts into another stage of the business cycle for the industry). Industries in the lower-right quadrant can also be called "emerging" industries, having the potential to contribute more to the region's economic base in the mid-term and long-term. They can be new sectors of the economy, or support sectors that are historically under-represented in the region. These sectors require special attention from economic developers, such as entrepreneurial assistance and new workforce training programs.
- ***Top-Left (Strong, Declining)***—The upper left quadrant contains industries that are more concentrated in the region than average, but whose concentration is declining due to below average or negative growth rates. If a mid-size or large industry or cluster is in this quadrant, this is an important warning that the region is losing a major part of its export base and should form planning and investment priorities accordingly, or even consider providing assistance (provided there is a reasonable expectation of long-term success). If the region does not bolster these industries or replace them with other export industries, then it will likely suffer significant job losses. A large industry in this quadrant usually indicates that layoffs are occurring and worker-transitioning programs will be needed.
- ***Bottom-Left (Weak, Declining)***—finally, the lower left quadrant contains industries that are less important regionally than nationally and are declining in employment. Industries here may represent warning signs that the region needs to attract more businesses in those

industries in order to maintain an economy that is sufficiently balanced and diversified in comparison to the national economy. Often, support industries can be found here that are under-represented in a community, such as Professional Services and Engineering. If industries in this quadrant offer high wages, then the community may be facing a situation where new jobs are not replacing jobs at the salaries required to sustain household income levels. In general, industries in this quadrant indicate a lack of competitiveness and should not be targeted.



Financial Activities is the most concentrated cluster (highest LQ) in Northeast Florida. This sector has the 6th highest employment in the region, but the greatest concentration relative to the US. Like the US, Financial Activities employment has declined over the past five years. The fastest growing industries are Education & Health Services; Leisure & Hospitality; Professional & Business Services; and Government. Despite the large military presence in Northeast Florida, Government is less concentrated locally, with an LQ of 0.83, but employment in this sector has been growing.

Manufacturing, a sector with strong local effects as demonstrated by the shift-share analysis, has a low concentration in Northeast Florida and has seen the greatest employment declines regionally after Building & Construction.

Regional Economic Clusters

State Industry Clusters

According to Enterprise Florida, "Florida's leading industry clusters play a key role in the State's continued economic success and competitiveness. Innovative organizations in key Florida industries, such as life sciences and aerospace, find the nurturing environment here for developing state-of-the-art technologies, while sophisticated financial and professional services firms prosper thanks to Florida's skillful workforce and the State's business-friendly environment."

Florida continues to find success in building science, technology, and professional industry clusters. Enterprise Florida has determined that Florida's strengths and future lie within the following industry clusters:

Clean Energy

Because of its geography, climate, and strong agricultural sector, Florida offers significant solar, biomass, and ocean energy resources. Additionally, with education and workforce training programs throughout the State's universities and colleges, the State is educating the workforce necessary for a competitive advantage. Florida has several clean energy research and development centers throughout the State, including: the Center of Excellence in Ocean Energy Technology (Florida Atlantic University); the Clean Energy Research Center (University of South Florida); the Florida Institute for Sustainable Energy (University of Florida); the Florida Solar Energy Center (University of Central Florida); and the Sustainable Energy Science & Engineering Center (Florida State).

Within the clean energy cluster are the following industries: solar energy, biomass energy, biofuels, fuel cells and hydrogen and ocean energy.

Life Sciences

There are over 600 biotech, pharmaceutical and medical device companies, and nearly 40,000 healthcare establishments in Florida.[2] Florida's life sciences cluster continues to gain critical mass around the State. Due to the State's research capabilities and collaborative efforts, life sciences businesses are thriving.

Education and research centers throughout the State include the Center of Excellence in Regenerative Health Biotechnology (University of Florida); the Center of Excellence in Biomedical and Marine Biotechnology (Florida Atlantic University); the Center of Excellence for bio molecular Identification and Targeted Therapeutics (University of South Florida); and the Center of Excellence for Nano-Bio Sensors (University of Florida). Additionally, Florida's areas of life sciences excellence, which includes cancer, diabetes and heart disease, have attracted six esteemed biomedical research outfits to the State in the last five years: the Burnham Institute for Medical Research, Scripps Florida, the Max Planck Institute of Bioimaging, the Miami Institute for Human Genomics, the Torrey Pines Institute for Molecular Studies, and the Vaccine and Gene Therapy Institute.

[2] Source: Enterprise Florida

Within the life sciences cluster are the following industries: biotechnology, medical device manufacturing, pharmaceuticals, and health care.

Information Technology

Florida has more than 245,000 persons employed in the Information Technology field.[3] Florida's Information Technology companies have a total payroll of$16 billion and an average wage of approximately$65,405.[4] Florida has several information technology clusters that have formed because of strong, ongoing cooperation between research institutions, businesses, and industry organizations. A prime example of this is the Florida High Tech Corridor Council, which is a partnership among the University of Central Florida, the University of South Florida, and the University of Florida, principals of top high-tech companies, and economic development organizations that help promote the growth of the high-tech industry in the 23-county region served by the three universities.

Within the information technology cluster are the following industries: modeling, simulation and training; photonics and optics; digital media; software and computer systems design and integration; computer products, microelectronic and precision device manufacturing; and telecommunications.

Aviation and Aerospace

Florida ranks 3rd in the nation for employment in the Aviation & Aerospace industry.[5] There are approximately 1,900 aviation and aerospace companies employing nearly 84,600 workers in the Florida. NASA and the Cape Canaveral Spaceport, as well as Florida's many U.S. military and air force bases are the key industry assets. Within Florida are several state of the art flight facilities and launch complexes for space exploration.

Florida has several notable research and design centers within the fields of aviation and aerospace, including: the Florida Center for Advanced Aero-Propulsion; Florida Technological Research and Development Authority; the NASA-KSC/Florida Dual-Use Technology Partnership; and Embry-Riddle Aeronautical University.

[3] Source: Excerpted from Bureau of Labor Statistics
[4] Source: Excerpted from Bureau of Labor Statistics
[5] Source: Excerpted from Governor's Commission on the Future of Space and Aeronautics in Florida, 2006

Homeland Security and Defense

Florida has a large homeland security and defense cluster, which varies from the manufacturing of satellites and tanks to vaccines. In 2006, Florida companies generated nearly$11 billion in Department of Defense Prime Contract awards, ranking the State 4th in the nation.[6] Florida has 12 major military installations and 3 command centers. Due to the military presence in Florida, the State is home to a large pool of highly skilled workers.

Florida has several notable research, design, and education facilities concentrating on homeland security. Among these are the Center for Biological Defense (University of South Florida); the Center of Excellence in Security and Assurance in Information Technology Lab (Florida State University); the Center for Infrastructure Protection and Physical Security (University of Florida); the Institute for Human Machine Cognition; the Institute for Simulation and Training (University of Central Florida); the National Center for Maritime and Port Security; and Scripps Pandemic Research and Synthetic Vaccine Development.

Within the homeland security and defense cluster are the following industries: information analysis and security; threat detection and prevention; and emergency preparedness, response and recovery.

Finance/Professional Services

A primary economic driver in Florida is the finance and professional services industry. In total, almost one million people are employed by Florida's Financial and Professional Services companies that have a combined payroll of close to$59 billion.[7]

Manufacturing

The manufacturing industry employs close to 400,000 workers in Florida[8] representing approximately 5% of the total state employment.[9] In 2007, the manufacturing industry accounted for approximately 5% of Florida's *Gross State Product* (GDP). The manufacturing industry in Florida produces a variety of products, including plastics and medical devices.

Regional Industry Clusters

Northeast Florida's Regional industry clusters parallel those identified by Enterprise Florida for the State as a whole. The Regional industry clusters identified within the Comprehensive Economic Development Strategy parallel those identified by AngelouEconomics in a 2006 Duval County Target Market Report, which was undertaken on behalf of the Cornerstone Regional Development Partnership.

[6] Source: Excerpted from Enterprise Florida

[7] Source: Bureau of Labor Statistics
[8] Source: Bureau of Labor Statistics
[9] Source: Florida TaxWatch Special Report, March 2009

An "industry cluster" is an economic development term defined as a concentration of interconnected companies and industries within a region. The companies and industries are interconnected not only by their particular markets, but also by their products, suppliers, workforce skill-sets, etc.

Transportation and Logistics

In terms of supply chain logistics, Northeast Florida is ideal for companies that depend on logistics and intermodal capacity. There are three major interstates (I-95, I-75, and I-10); three railroads (CSX, Norfolk Southern, and Florida East Coast); two deep-water ports—JaxPort, which has three separate marine terminals, and the Port of Fernandina; and an international airport. There are 45 million people within an eight-hour drive of Jacksonville and 60 percent of the U.S. population (approximately 179 million people) is within a 24-hour truck drive.

Northeast Florida includes a growing number of industry clusters, specifically aviation, financial services, and biomedicine.[10]

Finance and Insurance

The finance and insurance services industry cluster is centered in Jacksonville. There are several large companies located in Northeast Florida, including Bank of America, Blue Cross/Blue Shield, CitiBank, Fidelity National Financial, Inc., Merrill Lynch, Prudential and Wachovia. The table below lists the ten top headquartered companies in Jacksonville:

Exhibit 23 – Top Ten Headquartered Companies in Jacksonville

COMPANY	TYPE OF HEADQUARTERS	EMPLOYEES
Blue Cross & Blue Shield of Florida	Regional	7,000
CSX	Division	4,400
Citibank	Division	4,200
Bank of America	Regional	4,000
Wachovia	Corporate	3,500
Winn-Dixie	Corporate	2,500
Everbank Financial	Division	2,249
Aetna U.S. Healthcare	Regional	1,700
Everbank and Everhome Mortgage Comp.	Corporate	2,249
Fidelity Information Services	Corporate	1,700

Source: Jacksonville Economic Development Commission, 2009

[10] Source: Duval County Target Market Report, August 2006, AngelouEconomics

Northeast Florida is home to several military bases, including the Naval Air Station at Jacksonville (NAS Jax). The Aviation/Aerospace Center of Excellence at Florida State College at Jacksonville is dedicated to meeting the future local educational needs in that sector. Several financial services giants have major offices in Jacksonville. The Florida Space Authority and the Jacksonville Airport Authority are creating a commercial spaceport at Cecil Commerce Center.

Thousands of patients travel from across Florida and the southeast each year for the excellent biomedical services provided at the Mayo Clinic and Shands Jacksonville.

Adding to the attractive business environment is a growing concentration of high-tech businesses, and Northeast Florida has been ranked among the Milken Institute's[11] list of metro areas for top high-tech capacity.

Emerging Technology

The following emerging technology areas have important implications for the economic development strategy of Northeast Florida.

Materials Science

Materials science and engineering involves the properties and applications of matter. "The multidisciplinary research needed to advance materials science is a great fit for Florida's collaborative R&D climate. The State is particularly strong in materials research for aerospace, information technology and biomedical applications."[12]

Nanotechnology

According to Enterprise Florida, there are at least 36 companies in Florida that are working in the drug development, bio-sensor, nano-sensor, advanced materials, and electronics fields. The State of Florida university system has several notable research and design facilities in the nanotechnology fields, including: the Motorola nanofabrication Research Facility (Florida International University); the NanoScience Technology Center (University of Central Florida); the Nanoscience Institute for Medical Engineering Technology (University of Florida); the High-performance Materials Institute (Florida State University); the Center for Nano-Bio Sensors (University of Florida); and the Nanomaterials and Nanomanufacturing Research Center (University of South Florida).

Marine Science

Florida has over 1,200 miles of coastline and another 12,000 miles of inland rivers and streams. The marine sciences include a wide-range areas, including conservation, climate and atmospheric studies, marine biodiversity, aquaculture, marine resource management, coastal management, marine chemistry, and marine biotechnology. The total value of waterborne trade in 2005 alone was close to$63 billion.[13] According to the Marine Industry Association of Florida, in 2005 the marine recreation industry (i.e., boats) had a total output value of over$18 billion and employed over 220,000 people.

According to the Florida Fish and Wildlife Conservation Commission, in 2004 Florida's commercial fishing industry generated$534 million in economic impacts for Florida.

[11] The Milken Institute is an "independent economic think tank whose mission is to improve the lives and economic conditions of the people of the United States." www.milkeninstitute.org

[12] Source: Enterprise Florida

[13] Source: Enterprise Florida

Florida is home to many research and design facilities including: the Center of Excellence in Biomedical and Marine Biotechnology (Florida Atlantic University); the Harbor Branch Oceanographic Institution; the University of Miami Rosenstiel School of Marine and Atmospheric Studies (University of Miami); the Mote Marine Laboratory; the Whitney Laboratory for Marine Bioscience in St. Augustine (University of Florida); and the Nova Southeastern University Oceanographic Center (Nova Southeastern University).

The Region is home to the Jacksonville University Marine Science Research Institute (MSRI), which is an interdisciplinary facility that provides teaching and research opportunities on issues relating to the St. Johns River, as well as the overall marine environment. Research performed by MSRI includes the Fisheries Independent Monitoring Program and the High School Marine & Environment Education Program.

State and Local Economic Development Plans Affecting the Region

The success of CEDS is dependent on coordination and cooperation with the ongoing State economic development efforts that affect the Region, including:

- ***Rural Economic Development Initiative***
  Administered by the Governor's Office of Tourism, Trade, and Economic Development (OTTED), the Rural Economic Development Initiative (REDI) serves Florida's rural communities by providing a more focused and coordinated effort among state and regional agencies that provide programs and services for rural areas.

  There are currently three REDI counties in the Region: Baker County, Flagler County, and Putnam County.

- ***Rural Areas of Critical Economic Concern***
  Rural Area of Critical Economic Concern (RACEC) means a rural community, a region composed of rural communities, designated by the Governor that has been adversely affected by an extraordinary economic event, severe or chronic distress, or a natural disaster or that presents a unique economic development opportunity of regional impact. The Governor has designated three areas within the State as RACEC; two of the Region's counties, Baker County and Putnam County, are RACEC areas. The economic benefits of being designated a RACEC community are:

  - Certain criteria, requirements, or similar provisions of an economic development incentive are waived
  - Access to incentives such as: the Qualified Target Industry Tax Refund Program; the Quick Response Training Program; the Brownfield Redevelopment Bonus Refund Program; and the rural job tax credit program

- ***Targeted Industry Incentives***
  The Qualified Target Industry Tax Refund incentive is available for companies that create high wage jobs in targeted high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal

property, insurance premium and certain other taxes.

- ***Qualified Defense and Space Contractor Tax Refund***
  Florida is committed to preserving and growing its high technology employment base by giving Florida defense, homeland security and space business contractors a competitive edge in consolidating contracts or subcontracts, acquiring new contracts or converting contracts to commercial production.

- ***Capital Investment Tax Credit (CITC)***
  The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax.

- ***High Impact Performance Incentive Grant (HIPI)***
  The High Impact Performance Incentive is a negotiated grant used to attract and grow major high impact facilities in Florida. Grants are provided to pre-approved applicants in certain high-impact sectors designated by the Governor's Office of Tourism, Trade, and Economic Development (OTTED).

- ***Quick Response Training Program (QRT)***
  Quick Response Training (QRT) is an employer-driven training program designed to assist new value-added businesses and provide existing Florida businesses the necessary training for expansion. A state educational facility—community college, area technical center, school district or university—is available to assist with application and program development or delivery. The educational facility will also serve as fiscal agent for the project.

- ***Incumbent Worker Training Program (IWT)***
  Incumbent Worker Training (IWT) is a program that provides training to currently employed workers to keep Florida's workforce competitive in a global economy and to retain existing businesses.

- ***Economic Development Transportation Fund***
  The program is available to all Florida businesses that have been in operation for at least one year prior to application and require skills upgrade training for existing employees. Priority is given to businesses in targeted industries, Enterprise Zones, HUB Zones, Inner City Distressed areas, Rural Counties and areas and Brownfield areas.

- ***Economic Development Transportation Fund***
  The Economic Development Transportation Fund, commonly referred to as the "Road Fund," is an incentive tool designed to alleviate transportation problems that adversely impact a specific company's location or expansion decision.

- ***Enterprise Zone Incentives***
  Tax credits include a sales and use tax credit, tax refund for business machinery and equipment used in an

enterprise zone, sales tax refund for building materials used in an Enterprise Zone, and a sales tax exemption for electrical energy used in an enterprise zone.

- ***Brownfield Incentives***

The Brownfield Redevelopment Bonus Refund is available to encourage Brownfield redevelopment and job creation. Approved applicants receive tax refunds of up to$2,500 for each job created.

Past, Present, and Projected Future Economic Development Investments

- Recent Economic Development Investments
- Current Economic Development Investments
- Anticipated Economic Development Investments

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Strengths

Topic Area: Education

1. Top 10 in attracting college educated adults (14% gain)
2. UNF – growing positive reputation; attracting more students
3. Private College – Flagler College growing in popularity
4. Jacksonville University (increase in average GPA)
5. 2 of the top 10 ten high schools in the country
6. St. Johns County top ten in state (2 years running)
7. Passion of educators; elementary
8. Dr. Vitti – top leader
9. Despite perceptions, Duval County has been outperforming prior perceptions
10. Convenience of FSCJ & SJR (location of campus)
11. Trade school perspectives – on the job training, workforce development
12. Academies within high schools for preparation
13. UF as the research university for the region
14. We have 100% control over educational system
15. We have a variety of higher education opportunities (health sciences; law school)

Topic Area: Quality of Life & Quality Place

1. St. Johns River
2. Beaches
3. Climate, geo location
4. Trails and parks, rec resources
5. Health care network
6. ICW: source for residents/visitors alike
7. Mooring fields allow extended recreational trips
8. Historic downtowns and neighborhoods
9. 3 mile river walk
10. Post K-12 system
11. Regional planning
12. NFL team. Go Jags!
13. TPC
14. Adopt UFas part of our Region
15. Entertainment venues (St. Augustine Amphitheater)

Topic Area: Water Quality

1. Ground water in the Region abundant and of high quality
2. St. Johns River as a feature, source, asset
3. Regionally, high percentage of land in conservation, creeks, streams
4. Strong public water system region wide
5. Implementation of Total Maximum Daily Load (TMDL) programs
6. JEA district is experiencing a reduction in potable water demand
7. Recreational activities (ICW & SJR)
8. Younger infrastructure system, not aged or outdated equipment
9. Use external environmental disasters as models to avoid

Topic Area: Transportation

1. The Region is a logistics center (roads, ports, rail)
2. Numerous transportation/logistics companies located in the Region
3. Transportation infrastructure younger than aging facilities
4. Short commute times
5. Space port
6. Regional airport system with excess capacity
7. International airport (JIA)

Topic Area: Health

1. Mayo Clinic

2. UF/Shands
3. Cooperative nature that the regional health facilities bring to our Region
4. Available capacity in each regional health facility to keep us healthy
5. Research/IT development
6. Remarkably strong insurance companies and health related industries (Health IT/development) to support research innovation

Topic Area: Innovation & Economic Development

1. Leadership to demand innovation
2. One Spark
3. Local investment
4. Established and expanding high tech companies
5. Regional Economic Development cooperation
6. Dredging the channel
7. International draw as an economic driver
8. Opening of Cuba for trade
9. Migration from south Florida

Topic Area: Civic & Governance Systems

1. Consolidated city/county government Duval/COJ
2. One of the highest volunteerism rates in the state
3. Business leaders are active community participants
4. JCCI Recession Study #8- University of North Florida SBA to lead small business effort

Topic Area: Business Climate & Competitivess

1. Low taxes (all)
2. Military presence
3. Pro-business attitude

Topic Area: Talent Supply & Education

1. Quality of life
2. Military presence as a source
3. Quality and amount of primary and secondary institutions (FSCJ, UNF, JU, etc.)

Topic Area: Water Quantity

1. A lot of water in NEFL; highly productive aquifer
2. Lack of drought effects

Topic Area: Infrastructure & Growth Leadership

1. Chamber cooperation region wide
2. RLA

Weaknesses

Topic Area: Education

1. Perception of K-12 system
2. Politics. Ex: passion of teachers eclipsed by board member tensions; impacts image of an area
3. Lack of self-promotion
4. State, local required formula
5. 74% of high school students graduate
6. Inequality between schools within the same school district
7. Trouble recruiting teachers because of lack of job availability
8. Effectiveness of skilled labor training programs
9. Lack of adequate funding for public school system (Ex: challenge of funding keeping up with growth)
10. Lack of parental involvement, especially in low performing schools
11. Perceived conservative climate
12. Local regional effort
13. Lack of preparations for a global economy

Topic Area: Quality of Life & Quality Places

1. Low density
2. Lack of infrastructure, blight, food deserts
3. Urban sprawl
4. Crime – weed & seed areas
5. Lack of downtown Jax development
6. Location of jail in downtown Jax

Topic Area: Water Quality

1. Interbasin transfer to central Fl (see also Threat)
2. Santé Fe River Basin
3. Quality declining in springs and tributaries of SJR (not safe for swimming)
4. Water conservation
5. McCoys/Hogans Creek pollution and continued public use in those areas
6. Lack of central sewer system in those areas with pollution

Topic Area: Transportation

1. DOT sets LOS on SIS roads
2. Legislative requirements for SIS roads
3. Funding through (FDOT)
4. Lack of funding for the first coast outer beltway
5. Rate of growth; we grow faster than other regions (metric: vehicles on roadways)
6. Lack of public transportation and lack of connectivity between individual systems
7. Height of the Shands Bridge
8. Lack of direct flights to/from JIA
9. Low density

Topic Area: Health

1. Disparity within counties (health providers, availability)
2. State level politics that drive certificate of need and ER locations
3. Duval ranks 46 out of 67 statewide in overall health outcomes
4. Lack of funding for mental health
5. Unstable funding for Shands (indigent care)
6. Lack of walkability
7. Food deserts
8. Lack of mass transit

Topic Area: Innovation & Economic Development

1. Lack of mojo
2. Too much raw land not entitled
3. Lack of building and properly position land outside of Duval
4. Incentive competition

Topic Area: Civic & Governance Systems

1. Built in conflicts between cities and counties

Topic Area: Business Climate & Competitivess

2. Aging office building produce
3. Availability of vacant space in other counties
4. Lack of flexible or properly entitled land use/zoned properties

Topic Area: Talent Supply & Education

None identified during committee

Topic Area: Water Quantity

1. Cost of water (currently costs too little for the value)
2. Current growth of communities that demand high level of maintenance for access to water using potable water for irrigation

Topic Area: Infrastructure & Growth Leadership

1. Lack of vision at leadership level
2. Discussion of funding

Opportunities

Topic Area: Education

1. Charter schools
2. Reverse the disparities and even the playing field between school districts
3. Magnet school system (arts, college prep)
4. Enormous focus and leadership in the nonprofit sector
5. Encourage local students to study higher education in the Region
6. Market the unique selling points of individual schools within the districts
7. Partnerships with existing schools and major employers or other institutes
8. Align curriculum with actual business & target business needs
9. Improved funding & quality ranking for early childhood education

Topic Area: Quality of Life & Quality Places

1. Available open space and beautiful rural areas
2. Eco-tourism
3. JCCI Recession Recovery #9 – focus efforts on Downtown Jacksonville as the Regional First Impression

Topic Area: Water Quality

1. Improved conservation
2. Focus on reducing septic tanks, runoff and misuse of water from agricultural sector
3. Potential for water treatment and desalinization plants

Topic Area: Transportation

1. Trails system
2. First Coast Outer Beltway
3. Fix/improve/remove the Skyway
4. Geographical location relative to the global supply chain (exports)
5. Port expansion/dredging
6. Bus Rapid Transit (BRT)
7. Natural gas
8. Attracting more direct flights to/from JIA
9. Development of urban core transportation policy connecting regional density
10. Not burdened with outdated transportation system
11. Increase rail capacity at JaxPort

Topic Area: Health

1. Major health/research program in the Region
2. JCCI Recession Recovery #2 -Health and bio science council to advocate for growth in the health sectors
3. Tremendous opportunity with Clinton Health Matters Foundation
4. Position our Region as a Health Innovation hub
5. Medical tourism
6. Creation of urban health institute with our Regional partners (FBCBS, UF, CHM) maybe Mayo?

Topic Area: Innovation & Economic Development

1. Region has available space in the City to attract IT business
2. Est and expansion of high tech companies
3. To create a regional innovation center (JCCI Recession Recovery #7 – downtown as entrepreneurial target)

4. JCCI Recession Recovery #8 – UNF SBA for small business support
5. JCCI Recession Recovery #13- NEFL Advanced Business Accelerator

Topic Area: Civic & Governance Systems

1. Use 6 pillars to handle visionary/long term planning to remove politics/disruptions to achieve projects
2. JCCI Recession Recovery #11-Regional Council lead coalition effort to streamline regulations for business opportunities

Topic Area: Business Climate & Competitivess

1. Sports tourism
2. Marketing the Region's unique selling points (lack of taxes, climate)
3. Tout regional partnerships as a competitive advantage
4. Politics (all) – ex: legislative changes on growth management & funding
5. JCCI Recession Recovery Study #4 – cost/benefit analysis of public investments
6. JCCI Recession Recovery #12-annual economic summit to evaluate progress of economic goals.

Topic Area: Talent Supply & Education

1. Advanced manufacturing education
2. Regional infrastructure reflects /can reflect IT attitude (modern, forward thinking) atmosphere
3. JCCI Recession Recovery #13 – NEFL Advanced Business Accelerator study recommendation
4. JCCI Recession Recovery #5- market Innovate Cluster Study to WorkForce, higher Education and regional school districts,
5. JCCI Recession Recovery #6 – create talent from within regional schools, retain talent and attract global talent
6. JCCI Recession Recovery #10 – UF as the Region's research center

Topic Area: Water Quantity

1. The technology exists today to address water needs and address as a business model (ex: everglades)
2. Reuse systems

Topic Area: Infrastructure & Growth Leadership

1. Leverage public/private models
2. JCCI Recession Recovery #1 – port expansion improvements (Mile Point and deepen channel)
3. Dock rail

Threats

Topic Area: Education

1. Fragmentation of public school system
2. Magnet program creates brain drain
3. Bullying & effect in the classroom
4. Changing nature of work (does the education system create the necessary workforce?)
5. Politics
6. Funding

Topic Area: Quality of Life & Quality Places

1. Negative perceptions
2. Over estimation that the QOL plays in Economic Development

Topic Area: Water Quality

1. Interbasin transfer to central FL
2. Funding
3. Politics and costs (drives conservation efforts)
4. Growth
5. Sea level rise
6. Centralized state water system
7. Georgia

Topic Area: Transportation

1. Delay on port expansion may lose opportunity for exports
2. Future funding models (VMT, gas tax)
3. Salt water intrusion due to port deepening
4. No guarantee of larger ships to come to port

Topic Area: Health

1. Complacency. Being complacent can make us fall behind on our health outcomes
2. Aging population?
3. Funding for healthcare will continue to decrease on Federal level and continue to challenge businesses
4. Increases in obesity

Topic Area: Innovation & Economic Development

1. Regional self-doubt that is recognized around the state
2. Atlanta attracts our IT graduates and talent
3. Sea Level Rise (i.e. long term prospects at Mayport)
4. Negative press gains nationwide coverage
5. Lack of private equity
6. Tendency to believe our own stats
7. Polarization of private developers to compete
8. Over estimation of the effect of low taxes

Topic Area: Civic & Governance Systems

None identified during committee

Topic Area: Business Climate & Competitivess

1. Outbid on incentive packages .Ex: Georgia incentive packages vs. lack of Florida taxes

Topic Area: Talent Supply & Education

1. Loss of students outside of the region

Topic Area: Water Quantity

1. Infrastructure to handle the quantity of water
2. Potential for drought, weather effects

Topic Area: Infrastructure & Growth Leadership

None identified during committee

CEDS Committee Membership

The following regional leaders, representative of the economic interests of the region, worked hard on the update to the CEDS.

Name	Organization	Private Sector
Katrina Austin	Flagler County EOC	
Dane Baird	Keller Williams Realty	X
Perry Bechtle	Mayo Clinic	X
Aaron Bowman	JAXUSA Partnership	X
Dave Cobb	Florida Power & Light / FCMA	X
Hon. Doug Conkey	Clay County Chamber of Commerce	X
Thad Crowe	City of Palatka	
Michelle Crownover	Galaxy Aviation of St. Augustine	X
David Dinkins	University of Florida	
Dylan Farrell	University of North Florida	X
Renee Finley	Florida Blue	X
Purnima Ganju	Indo-US Chamber of Northeast Florida /VyStar Credit Union	X
Bill Garrison	Clay County Economic Development Council	X
Melissa Glasgow	St. Johns County	
Heather Ireland	City of Jacksonville	
David Kaufman	JAXPORT	
Laura Lane	JCCI	X
Ed Lombard	Ameriprise / FCMA	X
Terry Lorince	Downtown Jacksonville	X
Cheryl Lynch	SBDC at University of North Florida	
Jack Manilla	JCCI	
Karen Mathis	Daily Record	X
Alex McCoy	Putnam Chamber	X
Jack McWilliams	Lewis Longman & Walker / FCMA	X
Eric Nguyen	I-TECH Personnel Services	X
John Parker	Florida Building and Construction Trades Union, Sheet Metal Workers Union	X
Ed Randolph	City of Jacksonville	
Darryl Register	Baker County Chamber of Commerce / WorkSource	X
Clive Ricketts	JCCI	X
Steve Rieck	Nassau County Economic Development Board	X
Ivan Rodriguez	Jacksonville Transportation Authority	X
Joseph Roy	SBDC @ University of Central Florida	
Betzy Santiago	City of Jacksonville	
Linda Scaz	Haven Hospice	X
Amy Skinner	City of Bunnell	
Ashley Smith Juarez	The Bill, Hillary, and Chelsea Clinton Foundation	X
Nancy Stanton	AARP	X
David Strickland	World Affairs Council	X
Paul Tutwiler	Northwest Jacksonville CDC	X
Helga Van Eckert	Flagler County	

Acknowledgements

The following regional leaders and advisors contributed to committee work and the update to the CEDS.

Name	Organization	Private Sector
Chris Altmansberger	FSBDC	
Mike Brown	Putnam County	
J. Logan Cross	Jacksonville Regional Health Collaborative / Jacksonville University	X
Janis Fleet	City of Green Cove Springs	
Georgia Katz	St. Johns County	
Suzanne Konchan	St. Johns County	
Matt Stewart	US Dept of Housing & Urban Development	
Debbie Warren	First Coast Manufacturers Association	

TALENT SUPPLY & EDUCATION PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Accelerated Education Programs	Educators		TBD	On going
	Comments: Example includes International Baccalaureate in all 7 counties			
21st Century eLearning Platform Project	Jacksonville Office of Economic Development & Duval County Schools Partners : STIC Computing, LLC & AceApplications, LLC	Vital	TBD	In progress
	Comments: Website: http://aceapplications.com/			
Summit among the School Boards	NEFRC, School Boards, Educators, Corporate Sponsors, others	Regionally Significant	$7,500	
	Comments: Get all institutions together to talk about educational equity to meet the talent pool need. Provide tools so students are employable right after high school if they want: vocational training. Ask and assist educators with the best programs in the region to help replicate them in counties without them. Begin by convening a Summit among the School Boards to acknowledge the good work they do, and provide a regional forum and focus. Address: transferability of best practices, equity issues for domestic and foreign-born students, skills training, accelerated programs and technology. Output should be a specific action plan with support identified, and implementation.			
Capitalize on Veterans	JaxUSA Partnership, CareerSource	Vital	TBD	
	Comments: Veterans are a highly desirable source of employees for existing Jacksonville businesses and businesses considering Jacksonville for expansion or relocation. Veterans are a dedicated and loyal employee, have training and skillsets which can be of immediate use in the labor force, thrive in a diversified workforce, and have demonstrated the ability to lead and be led. Due to Personal Privacy laws, DoD will not allow government resources to be used to recruit active duty/veterans or have them post their qualifications and resumes. Most exiting military are aware of their exit date months ahead of their final day of service and should be able to be courted by potential employers and be prepared for the transition. The region could be the leader in creating a new web-based initiative which would allow active duty and veterans the ability to post their resumes, their availability dates, their unique skills and qualifications, their interests, etc. on a website which could be accessed by potential employers. Employers should also be able to post positions that that would be accessible only by active duty and veterans. There should also be a weblog where jobseekers can post questions, ask advice, etc. Although it sounds easy, there would need to be a way to limit access to only veterans and not be abused by companies trying to "sell" services to our active duty military or veterans. Currently if a company asks a question on availability such as "Can you tell me how many service members will be leaving the Navy in this area with Helicopter maintenance backgrounds in the next year and how we could get in touch with them to offer employment, the answer is "we do not have access to that data". This web-based service could change the answer by producing a list and contact information.			
Bridge Training	TBD		TBD	
	Comments: Do a study of the under-employed and business needs. Provide bridge training to address the gaps.			
Advanced Manufacturing	FSCJ, EDO's and Regional Public Schools	Vital	First Coast Manufacturers Association, Regional Manufacturers	

	Comments: Create a pipeline of qualified talent to fill jobs in Advanced Manufacturing			
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Clinton Health Matters Bold Action Steps	TBD	Regionally Significant	TBD	
	Support education and employment for young black men to accomplish economic self-sufficiency.			
	Implement a NEFL transportation plan to access education and employment opportunities.			
	Every school is and "A" school.			
	Expand Guiding Stars throughout Northeast Florida.			
	Identify and provide resources necessary to move all homeless children into appropriate housing.			
	Develop a Right to Thrive framework to be socialized community-wide.			
	Launch a community-wide training effort to adopt, integrate and translate the Right to Thrive framework.			
	Adopt and begin implementation of a framework of "health equity" that delineates optimal requirements for support.			
	Create a funded, staffed "coalition central" organizing body to connect community-wide family and social service support efforts.			
	Promote comprehensive health education for incarcerated youth.			
INNOVATION AND ECONOMIC DEVELOPMENT PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Work with JaxUSA Partnership	JaxUSA			
Jacksonville Space Initiative	City of Jacksonville & Cecil Field Partners: Florida Space Tourism Society		TBD	
	Comments: Website: http://spacetourismsociety.org/sts-florida/			
Regional Marketing Tool	TBD		TBD	
	Comments: Create a tool kit that helps businesses thrive, not just one that markets the regional lifestyle and amenities.			
Universities downtown	TBD	Regionally Significant	TBD	
	Comments: Put a university, or cluster/collaboration of universities, downtown. Get UF to do research in our region. They could be one of the universities downtown. Let UF know the opportunities we have to collaborate on research.			
Energy Efficiency of Buildings	TBD		TBD	
	Comments: Increase energy efficiency of buildings, with emphasis on retrofit.			
Alternative fuels	North Florida TPO, RTC; EDO's; transportation providers	Vital	TBD	
	Comments: Position Northeast Florida as an innovative center for production, distribution and use of alternative fuels (natural gas, LNG, CNG)			
Clinton Health Matters Bold Action Steps	TBD	Regionally Significant	TBD	
	Grow telehealth systems to increase access to care in rural areas			
	Expand telemedicine for substance abuse and mental health			
	Construct an integrated system of care in which money moves with client to best serve patients.			

	Create a coordinated and sustainable mental health system.			
	Use creative strategies including social media and smart phone technology to address family diet.			
INFRASTRUCTURE AND GROWTH LEADERSHIP PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Regionalize Food Policy Group	TBD		TBD	
	Comments: Make current Jacksonville food policy group regional			
Raise the Shands Bridge	FDOT, North Florida TPO, Chambers, County and Municipal Governments	Vital	TBD	
Google Fiber Project	Jacksonville Office of Economic Development & Jacksonville Mayors Office & JEA Partners : STIC Computing, LLC & AceApplications, LLC & Google	Vital	TBD	
	Comments: Website : http://aceapplications.com/ https://static.googleusercontent.com/media/fiber.google.com/en/us/about/files/googlefibercitychecklist2-24-14.pdf			
Jacksonville Port Expansion	JaxUSA/Jacksonville Chamber/Jacksonville Port Authority	Vital	TBD	
Desalinization Plant	TBD		TBD	
	Comments: This should be considered as utilities plan for growth, and conservation should be used to delay its construction.			
Replace failing septic tanks	TBD		TBD	
	Comments: Replace failing septic tanks with sewer hookups or functioning systems within 5 years			
Clinton Health Matters Bold Action Steps	TBD	Regionally Significant	TBD	
	Increase pedestrian and bicyclist safety.			
	Provide bike lanes to connect neighborhoods and commercial centers.			
	All parks accommodate all abilities for physical activities			
	Identify or establish comprehensive teen health clinics in Northeast Florida.			
	Design and begin implementation of a regional trail and connectivity system that embraces the unique character of the region and provides trail access to the beach, river, tributaries and ICW to realize the tremendous economic and health impacts to the Region.			
	Preserve, renovate and/or develop 500 units of affordable housing.			
BUSINESS CLIMATE AND COMPETITIVENESS PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Food Innovation and Business Incubator	Educational and Research Institutions (UF, UNF, Flagler College, First Coast Technical College, etc.), Florida High Tech Corridor Council, Food Industry (Distributors such as , U. S. Food, Beaver St. Fisheries, Retailers, etc.) and End users (Mayo Clinic and	Vital	$8,000,000. Could be two phases. Hub and Product Development	

	hospitals, military, schools, etc.)			
	Comments: to allow local food to be processed and distributed in the region. Two major components: Food hub to allow for shared use processing, and product development research kitchen/labs/facilities. Maximizes opportunity for nutraceuticals, already identified as having potential in NE Florida. Model: Rutgers Food Innovation Center			
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Build wealth in rural areas	Use Enterprise Florida Study to determine techniques that will help us build wealth in rural areas		TBD	
Food Security Study	UF or Consultant, USDA Rural Development, NEFRC, local governments to implement.	Vital	$50,000	
	Comments: Food security study to include carrying capacity of the region. Determine per capita consumption of meat, fruits and vegetables in region. Also determine the potential for sales of agricultural products grown in-region to markets outside of the region. Determine how much land is currently producing these agricultural products, and what locations and amount are necessary for the continued viability of agriculture in NE Florida. Once the study is complete, local governments should consider before any proposal to convert agriculture to other uses is approved. NEFRC should consider policies for inclusion in the regional plan.			
North Florida Small Business Help	SBDC at UNF/SBDC at UCF/NEFRC/Technical Assistance Providers	Regionally Significant	$3,000	
	Comments: Make North Florida Small Business Help a more robust site that is continuously updated. It should include a calendar of events for all seven counties, and include resources available in all seven counties. It's Road Map feature should be enhanced to provide the user with more assistance, regardless of the development stage of their business. It should have a dedicated source of funding so that SBDC at UNF can maintain the enhanced site and can coordinate with Flagler County and the SBDC at UCF on events and resources. It should be governed by a partnership of organizations from the seven counties that can continuously improve its usefulness.			
Clinton Health Matters Bold Action Steps	TBD	Regionally significant	TBD	
	Develop and begin implementation of a youth-centric strategic plan with youth for youth to address obesity and healthy eating.			
	Design and implement a mobile food distribution system.			
	Engage corner stores and other retailers to offer fresh fruits and vegetables at affordable prices.			
	Engage government, sports, schools and faith-based organizations to create a single message campaign for healthy eating and food quality.			
	Launch a regional study of factors influencing domestic violence and launch a region-wide campaign to prevent domestic violence.			
	Increase prevention programs to reduce youth crime and youth violence.			
	Expand community access for mental health services.			
CIVIC AND GOVERNANCE SYSTEMS PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Regional Clearinghouse	NEFRC			
	Comments: Create an **online clearinghouse for studies** on all issues of interest to the region			
Collaborate on Six Pillars Caucus	NEFRC/Jacksonville Chamber/JaxUSA Partnership/Local Governments	Regionally Significant	TBD	

	Comments: Northeast Florida is a Six Pillars Community. Collaborate on Six Pillars Caucus Leadership Website:http://www.flchamber.com/six-pillars/six-pillars-caucus-system/			
"Farm to Flag"	JaxUSA Partnership, Institutions, FL Dept. Ag. Marketing Council	Vital	$1,000	
	Comments: Convene an event to implement the principles of "Farm to Flag": get local produce into government and corporate institutions. Convene the institutions to discuss their needs and how this could be done. Facilitate institutions in local purchasing.			
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Replicate success of JaxUSA	Clinton Health Matters, Providers in the Region	Regionally Significant	TBD	
	Replicate the success of Jax USA Partnership in all issue areas. Include human services, education, wealth-building, food, etc.			
Clinton Health Matters Bold Action Steps	TBD	Regionally Significant	TBD	
	Every K-12 public school has a joint use agreement that allows for safe public access to encourage physical activity.			
	All K-12 public schools offer 30 minutes of PE or other physical activity daily.			
	Work towards policy change that ensures all Northeast Floridians are eligible for affordable health insurance.			
	Support the acceptance of federal pass-through funds to support the expansion of Medicaid eligibility, making more insurance affordable.			
	Develop an integrated regional care and information exchange to increase access points to care and care coordination.			
	Implement health literacy programs in all K-12 public schools.			
	Expand the comprehensive medical home model to more primary care providers.			
	Expand and share effective drug policies across Northeast Florida to ensure that there are consistent substance abuse policies across the counties.			
	Regionally source and distribute funds dedicated to substance abuse prevention and intervention.			
QUALITY OF LIFE AND QUALITY PLACES PILLAR				
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Energy, water efficiency, resiliency, and accessibility retrofit for low and very low income residents of the region	NEFRC, All counties, Low income housing providers meeting grant criteria	Vital	Federal Home Loan Banks, USDA Housing Preservation Grants for Rural Areas, Office of Environmental Justice Small Grants Program 2015, HUD	
	Comments: Enhance all HOME funded, CDBG funded and SHIP funded programs in the region to include energy and water efficiency retrofit, resiliency retrofit, and accessibility retrofit for low and very low income residents of the region. This includes inspector education, program expansion and implementation. Funding would give the homeowner the information and ability to choose efficiency/resiliency/accessibility. Funds could only be used for these improvements, not to augment existing program.			
Regional Maritime Management Plan	Duval, Nassau, St, Johns, Flagler Counties, FIND, NEFRC	Vital	TBD	
	Comments: Capitalizing on the Duval County plans for a maritime management plan, review the assets of the St. Johns River, Intracoastal Waterway and Atlantic coast and identify sites for additional boat access, including mooring facilities. Encourage other Counties to do similar plans using a consistent methodology so the result is a regional maritime management plan.			

Jacksonville Regional Health Collaborative	Duval County Health Department, Health Planning Council, Institutions of Higher Education, Hospitals, etc..	Regionally Significant	TBD	
	Comments: Jacksonville Regional Health Collaborative to facilitate collaboration/incubation/research.			
Northeast Florida Global Supply Chain Institute	UNF CCB & Engineering & UF Engineering JaxPort, Jax USA Partnership First Coast Manufacturers Association	Regionally Significant	TBD	
	Website: http://fisher.osu.edu/centers/scm			
Project	**Lead/Partners**	**Type**	**Resources**	**Status**
Clinton Health Matters Bold Action Steps	TBD	Regionally Significant	TBD	
	Identify a dedicated funding stream for an ongoing physical activity strategy.			
	Medical community embraces fitness as a prescription for better health.			
	Strengthen families and create the foundation for optimal health through integrated program and resource tracking.			
	Increase utilization of existing care facilities to meet residents needs and improve health disparities.			
	Develop a program that provides certification to users and land uses that meet healthy criteria.			
	Update and revise zoning codes and comprehensive plans to evaluate health implications and incorporate health into all public policies.			
	Clean drinking water is available and sustainable in all areas throughout Northeast Florida.			
	Increase substance abuse prevention and mental illness identification training with school counselors, law enforcement and emergency responders.			