West Florida Comprehensive Economic Development Strategy

2013-2018




West Florida Regional Planning Council


West Florida Comprehensive Economic Development Strategy

2013-2018

December 2012
Updated September 2016~~September 2015~~

Grant Period: February 17, 2015 through December 31, 2017
This document has been prepared with financial assistance from the U.S. Economic Development Administration

West Florida Regional Planning Council
4081 East Olive Road, Suite A
Pensacola, FL 32514
850.332.7976

Table of Contents

THIS PAGE LEFT BLANK INTENTIONALLY

Executive Summary

THIS PAGE LEFT BLANK INTENTIONALLY

Executive Summary

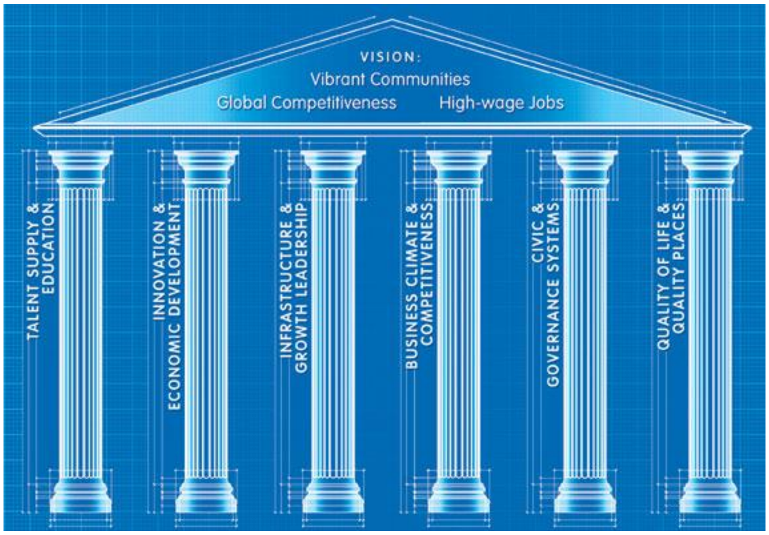
West Florida Regional Planning Council (WFRPC) is the designated regional planning agency for the West Florida region, located in the western panhandle of Florida. In this capacity, WFRPC strives to foster a proactive regional planning process that will help create jobs, support a stable and diversified regional economy, and improve living conditions and prosperity for residents throughout the region.

In 1995, the WFRPC region was designated an Economic Development District (EDD) by the U.S. Department of Commerce Economic Development Administration. Developing a Comprehensive Economic Development Strategy (CEDS) is a prerequisite for most Economic Development Administration (EDA) planning programs. The key to a good CEDS is an ongoing, participatory planning process that includes input from a steering committee and where possible, the committee should represent the major interests of the community.

WFRPC sent out letters to leaders of organizations that represented different social and economic conditions in the region in order to participate in the creation of a regional CEDS. The CEDS is designed to guide economic growth by fostering a more stable and diversified economy, assist in the creation of jobs and improve the living conditions in the seven county region. In addition, it provides a mechanism for coordinating the efforts of individuals, organizations, local governments, and private industry concerned with economic development. The CEDS also provides a framework for improving regional development partnerships, while the EDD designation provides extra funding for implementing the goals and objectives outlined in the CEDS.

The primary functions of the EDD include, but are not limited to, the preparation and maintenance of a CEDS, to assist in the implementation strategies identified in the CEDS and provide technical assistance to Economic Development Organizations throughout the region. In the WFRPC region, there is also a continuous effort to work with economic boundaries that reflect economic realities rather than static political boundaries. This effort started in 2000 when Florida’s Great Northwest (FGNW) was formed and incorporated. Recognizing that collective advantages and regional strengths are best harnessed when working together, a forward-thinking group of business, academic and economic development leaders from the sixteen Northwest Florida counties joined hands to form Florida's Great Northwest. FGNW is a regional economic development organization serving sixteen counties in northwest Florida.

The Department of Economic Opportunity (DEO) and the University of West Florida’s Haas Center for Business Research and Economic Development (CBRED) have been essential partners in the CEDS process as well.



In 2012, the CEDS underwent a major update at the direction of the Department of Economic Opportunity. The Florida Regional Councils Association (FRCA) met and agreed to voluntarily undertake this style of update. The main purpose of this redesign of the document is to allow each main focus of a region's CEDS to be easily plugged into the Florida Strategic Plan for Economic Development, which is based on the Six Pillars of the Florida Chamber, illustrated above. One other advantage of this new style of update is each CEDS document will be easily comparable to the documents created by the other RPCs.

Internally, the CEDS decision-making process has been driven by the CEDS steering committee and the WFRPC's members, who focused on attracting and retaining business, workforce development, and other key areas. The external driving force includes an extensive array of individuals from both the private and public sectors.

This CEDS will give the region's leadership a current picture of the economic strategies for the next five years. To best present this information, the region's vision and goals have been evaluated both in terms of their strengths and weaknesses and vis-à-vis merging opportunities and threats. The programs and projects recommended, therefore, fit directly into both the region's vision and goals and the CEDS guidelines. The performance evaluation presents a series of quantitative benchmarks that are the baseline for the new yardstick we will use to measure our success. The Council will be responsible to ensure that our strategic goals and action plans address the critical issues highlighted by the new CEDS.

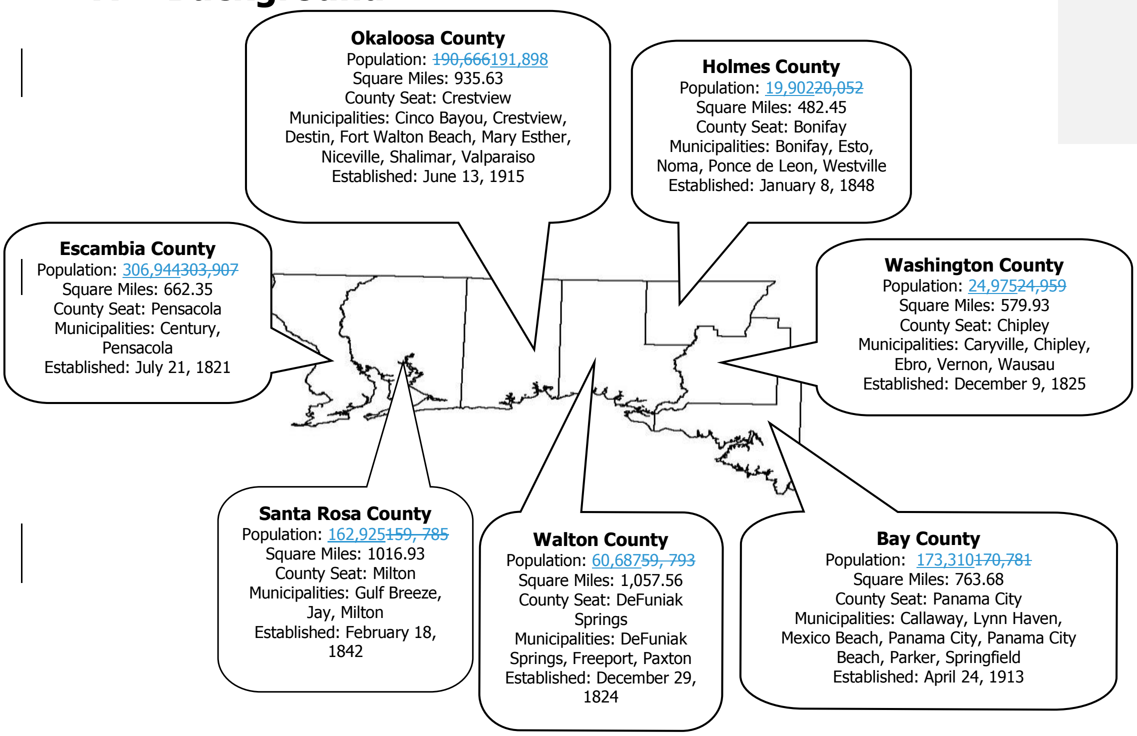
Above all, this CEDS continues to be a working document used by both the private and public sectors, to continually stir curiosity about the region's economy and to motivate participation in the planning and implementation process. As we progress in to the 21st century, economic growth and health for the West Florida region will increasingly depend on building and expanding the private-public partnerships that started this process.

Comprehensive Economic Development Strategy

THIS PAGE LEFT BLANK INTENTIONALLY

Comprehensive Economic Development Strategy

A. Background



Source: Bureau of Economic and Business Research (BEBR) 2014 Florida Estimates of Populations

The West Florida Regional Planning Council (WFRPC) is located in the western most portion of the Panhandle. The major physiographic divisions in the region are the Northern Highlands (includes the Western Highlands and the New Hope Ridge), the Marianna Lowlands (in Holmes and Washington Counties), and the Coastal Lowlands. Topographic relief is relatively great when compared to Peninsular Florida, ranging from sea level to elevations of 350 feet. The region is approximately 6,026 square miles in size with 8.4 percent of these square miles being water. The region has both urban and rural development. The three rural counties are Holmes, Walton and Washington. Holmes and Washington Counties as well as the city of Freeport, in Walton County, are designated as Rural Areas of Opportunity (RAO), a designation that is up for renewal in the next legislative session. The four urban counties are Bay, Escambia, Okaloosa and Santa Rosa, however, even these counties are rural in nature and function, primarily in the northern portions of each. Five of the seven counties, Bay, Escambia, Okaloosa, Santa Rosa and Walton have coastlines on the Gulf of Mexico. They also border on at least one of the several bay systems in the region.

There are three Metropolitan Service Areas (MSAs) and thirty-five municipalities. The largest municipalities are Pensacola in Escambia County, Fort Walton Beach in Okaloosa County and Panama City in Bay County. The combined population of these three MSAs is about 90 percent of the regional population. The WFRPC region population in 2014 of 955,209 made up for roughly 5% of the state's total population.

The most populous areas of the region are logically located within the three MSAs: Pensacola in Escambia County – the region's most populous county, Crestview in Okaloosa County and Panama City in Bay County. The counties of Santa Rosa and Walton have seen the most population growth in recent years. Apart from the densely populated coastal areas, much of the inland region is rural.

The military, a key component of the region's economy, contributed over $18.1 billion in economic impact in 2013, and continues to grow as a result of the consolidation of facilities from around the United States to the region. Of the twenty-one military installations in the state of Florida, our region houses nine. Critical military installations in the Region include: Tyndall Air Force Base, Naval Support Activity Panama City, Eglin Air Force Base (including Hurlburt Field, Duke Field and the Army 7th Special Forces Group Airborne Cantonment), Naval Air Station Pensacola (including Corry Station, Bronson Field and Saufley Field), Naval Air Station Whiting Field and NSA Panama City. Tyndall Air Force Base encompasses an area of 28,667 acres and contains large tracts of virtually undisturbed land. Located in Santa Rosa, Okaloosa and Walton Counties, Eglin Air Force Base covers 464,000 acres and is the largest Department of Defense installation. NAS Pensacola inhabits 7,038 acres and its complex is in both Escambia and Santa Rosa Counties. There are three historic forts in the NAS Pensacola area: Fort Barrancas on NAS Pensacola, Fort Pickens on Santa Rosa Island and Fort McRae on Perdido Key. NAS Whiting Field is located on ±9000 acres of land in Santa Rosa County. The USN Coastal Systems Station resides on 665 acres in Panama City.

There are more than 116,384 active duty military and federal employees and their spouses living in the region. Veterans comprise of about 22 percent of the region's civilian population and more than 30,000 military retirees. It is estimated that over 74 percent of the military retirees are employed in second careers.

The ~~Northwest Florida Regional Airport~~Destin Ft. Walton Airport in Okaloosa County is situated on Eglin Air Force Base offering a 12,000 foot runway and includes an expanded aircraft parking apron, a 110,000 square foot passenger terminal, a dog relief area, a 22 acre rental car facility and a USO Center "Freedom Lounge" serving more than 30,000 troops annually. The airport's trade area is heavily oriented toward the important defense weapon system development and test evaluation mission at Eglin AFB. The Destin-Fort Walton Beach Airport has 25 flights daily through services of Delta Airlines, American Eagle, United Airlines and US Airways. In 2016, the airport added carriers Allegiant and Glo. The Airport serves approximately 800,000 passengers each year with direct service to Atlanta, Dallas, Houston and Charlotte. ~~Allegiant, Glo carriers~~.

Bay County stakeholders completed construction on their $318 million international facility now called the Northwest Florida Beaches International Airport. Currently, Southwest serves direct flights to Baltimore, Dallas, Houston, Nashville and St. Louis, Delta has direct flights to Atlanta, and United Airlines offers non-stop service to Houston Intercontinental Airport and Silver Airways offers direct flights to Orlando and Tampa. There is a 10,000 foot runway, allowing larger jets and commercial aircraft of any size to land more easily.

The Pensacola International Airport (PNS) is owned and operated by the City of Pensacola. Air service is provided by seven major carriers with direct connections to Atlanta, Dallas, Houston, Washington D.C., Chicago, Nashville, Tampa, Orlando, New Orleans, Jacksonville, and Miami. The airport serves over 1.5 million passengers per year with an average of more than 4200 passengers per day.

The region is served by two deep water ports in Pensacola and Panama City, both of which include foreign trade zones. Panama City is number one in the country for handling copper. The port in Pensacola houses a variety of import and export activities ranging from aggregate, cement, lumber and paper to wind turbine generators. Two recent expansions include development related to Marine maintenance, repair and overhaul (MRO) operation services for the marine and oilfield industry and advanced manufacturing. The Pensacola Port currently has approximately 25 acres for additional development opportunities.

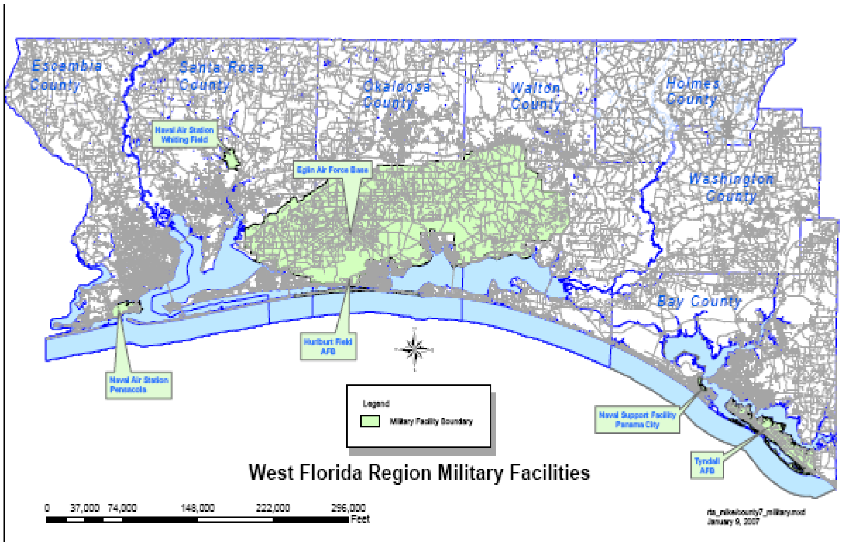


FIGURE 1: Military Facilities

B. Goals and Objectives - Building the Pillars

The Comprehensive Economic Development Strategy must contain a section setting forth goals and objectives necessary to solve the economic problems, or capitalize on the resources, of the region. Any strategic project, program, or activity identified in the Comprehensive Economic Development Strategy should work to fulfill these goals and objectives. 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 time frame of the Comprehensive Economic Development Strategy.

The DEO and WFRPC CEDS Plan are both built upon the Six Pillars of Florida's Future Economy. They are (1) Talent Supply & Education, (2) Innovation & Economic Development, (3) Infrastructure & Growth Leadership, (4) Business Climate & Competitiveness, (5) Civic & Governance Systems and (6) Quality of Life & Quality Places. This is all based on the vision that Florida will have the Nation's top performing economy and be recognized as the World's best place to live, work, and do business. This is all part of the WFRPC CEDS as well as the WFRPC Five Year Strategic Plan, illustrated below.

Statements and Strategies for the Five Year Regional Strategic Plan for Economic Development –At-A-Glance

Vision

- West Florida will have the nation's top performing Coastal/Rural economy and be recognized as the State's best place to live, learn, work and do business.

Goals

- Lead North Florida and the surrounding Southeastern States as a location for business, investment, talent, innovation and visitors.
- Become the State's top performing economy.
- Lead the nation in quality of life.

Objectives

- Create more jobs.
- Grow businesses.
- Get Floridians back to work.
- Increase the competitiveness of this region.
- Foster opportunities for prosperity.

Cross Cutting Strategies

1. **Improve collaboration and alignment among county and municipal entities toward the state's economic vision.**
2. **Develop and implement a regional strategy to develop several industry clusters using among the various transportation corridors.**
3. **Position West Florida as a regional hub for trade, visitors, talent, innovation and investment.**
4. **Connect economic development, talent, infrastructure, partnerships and other resources across the region to build Florida as a globally competitive State.**

West Florida Area-Specific Strategies

Talent Supply & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
5. **Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.** 6. Ensure educational systems and workforce training that support innovation and creativity as well as the military.	7. **Provide funding for ongoing economic development activities.** 8. Provide Technical assistance and use new technology to promote job growth. 9. Build seamless information technology infrastructure. 10. Encourage alternative energy production and green product industries. 11. Brand the region as a hub to attract and retain entrepreneurs.	12. **Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment.** 13. Develop economic clusters to diversify our economy beyond tourism and military support.	14. **Encourage local governments to develop streamlined development approval procedures.** 15. Monitor CEDS Performance Measures. 16. Develop projects and programs that support existing and new business. 17. Increase investment in business development and placement in the region.	18. **Improve Coordination of economic development, land use, infrastructure, water and natural resource decision making.** 19. Redevelop brownfields sites into valuable pieces of real estate to benefit communities, local businesses, the economy, and the region.	20. **Protect natural resources to support quality environment and eco-tourism.** 21. Develop projects that improve the region's quality of life.

1. Talent Supply & Education - Goals

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

i. Objective 1.1.1: Adequate funding shall be available to provide education and training,
ii. Objective 1.1.2: Build a sufficiently skilled workforce to meet future employment demands.
iii. Objective 1.1.3: Become a national leader in providing financial resources to support workforce training and skill development programs.

b. Goal 1.2: Ensure educational systems and workforce training that support innovation and creativity as well as the military.

i. Objective 1.2.1 Review policies and rules to identify barriers to innovation and creativity in schools.
ii. Objective 1.2.2 Support the growth and expansion of universities of higher learning.

c. Goal 1.3: Provide transitional assistance to military personnel in to the civilian workforce

Skills assessments
Data Collection
Specific training to close employment gap
Entrepreneurship educational programs

i. Objective 1.3.1 Continue engagement in Eglin Community Partnership Program Workforce Development for the Military Lifecycle working group
ii. Objective 1.3.2 Replicate Eglin model at other military installations in the region.

Introduction
The purpose of the Talent Supply & Education Pillar is to align education and workforce development programs to better develop and retain talented workers with the skills to meet current and future employer needs.

This means this region will have to develop an integrated pre-K through career education system to prepare students for becoming successful workers or entrepreneurs.

We will have to lead the nation in science, technology, engineering, and mathematics (STEM) research, education, medical and health sciences, and market-relevant technical skills.

Workforce Development
The skill sets of the majority of the existing workforce are geared toward industries that are declining or which have already left the region, or toward the retail and tourism service sector. There is not the depth of skill sets available in the region to support the growth industries, especially those knowledge-based target industries that will be necessary to diversify the economy. Manufacturing activity has increased in recent years with the reshoring of previously outsourced jobs. This incline in technical skills requires a refocus on career and technical training opportunities. In the past, filling skill sets needed for knowledge-based industry jobs was relatively easy. Area businesses recruited those skill sets from northern climates. The region's warm weather, quality of life, and low cost of living made this the easy option for filling employment needs. However, economic forces have virtually eliminated that option. The cost of living for the region is now at or above the national average. Although the cost of living is above average, the average annual income for the region is more than twenty percent below the national average. Wage structure vs. the cost of living no longer supports employee recruitment.

Action Items
1. Encourage Workforce Investment Boards and related agencies to:
   a) Promote continuing skills development and career development programs for targeted industries as a means by which to demonstrate professional growth and advancement opportunities to existing employees.
   b) Capitalize on training programs and financial assistance for those programs that exist in the region and continue to support bringing additional programs to the region.
   c) Target businesses that need assistance.
   d) Work with area colleges, career and technical schools, and research centers for training area residents with the skills and other qualifications necessary to take advantage of current and emerging market opportunities.

2. Continue to expand workforce development programs in our K-12 system, such as the CHOICE model. Advocate for continual alignment between programs or academies and the local economy and focus on developing more programs in economic development target industries such as Cyber Security and Advanced Manufacturing.

3. Develop/enhance programs and processes that connect the military community with business opportunities.

4. Encourage businesses to utilize creative employee retention tools.

5. Continually conduct research on the workforce skills needed by targeted industry employers and share those findings with workforce development and education/training facilities so that appropriate programs are structured to meet targeted industry employment demands.

Research and Development

The Emerald Coast is home to several large military bases. This presence provides a strong opportunity to expand the research and development business to support these missions. The 96th Test Wing, Eglin AFB, Florida, is the test and evaluation center for Air Force air-delivered weapons, navigation and guidance systems, Command and Control systems, and Air Force Special Operations Command systems. The 96th TW performs developmental test and evaluation across the complete system life cycle for a wide variety of customers including: Air Force Systems Program Offices, the Air Force Research Laboratory, logistics and product centers; major commands; other DoD services and U.S. government agencies Naval Support Activity Panama City (NSA PC) provides research and development and in-service support for expeditionary, amphibious warfare, diving maritime special operations and mine warfare. The largest tenant of the NSA PC is the Naval Surface Warfare Center Panama City Division (NSWC PCD). It is one of the major research, development, test and evaluation laboratories of the Navy, boasting a wide base of expertise in engineering and scientific disciplines in the mission areas of mine warfare, expeditionary warfare, special warfare, and diving and life support. Also at the base is the 53rd Weapons Evaluation Group which conducts the Air Force's air-to-air and air-to-ground Weapon System Evaluation Programs. Additionally, the technology to support these military efforts could be expanded into other business ventures and opportunities. In addition to the research and development undertaken at the military bases, vital research is conducted at the Institute for Human & Machine Cognition and at several private companies. By strengthening the current level of research & development conducted in the region, increased opportunities for supporting the transformation into a knowledge-based economy will become available; further diversifying and enhancing our region's economy.

Training

NAS Pensacola is not only the premier training facility for Naval jet pilot training, it also supports 89 Department of Defense (DoD) and 30 non-DoD commands primarily dedicated to training personnel. Major tenant commands include Naval Air Schools Command, Naval Air Technical Training, Marine Aviation Training Support Group 21, the Blue Angels Navy Flight Demonstration Squadron, and the headquarters for Naval Education Training Command, which combines direction and control of all Navy education and training. NAS Whiting Field provides training for Navy helicopter pilots, Hurlburt Field is currently the only location for training of the elite AF Special Operations

Forces in the Southeast, and Eglin AFB is the home of the training for the Joint Strike Fighter (JSF) unit, and the Air Force Research Lab Munitions Directorate (AFRL). Tyndall Air Force Base houses the 325th Fighter Wing which provides training for the F-22 Raptor fighter pilots, maintenance personnel, air battle managers, intelligence officers, crew chiefs and air traffic controllers.

Actions Steps
1. Establish a working partnership between research colleges and universities, private sector research companies and military/federal labs to help strengthen the transfer of research into commercial application. This effort will help to ensure a framework for measuring regional innovation and will help economic development leaders strengthen regional prosperity.
2. Develop the infrastructure for research and development such as research and technology parks and incubators.
3. Create a unified front as a community to address life sciences through a Center of Excellence. Include colleges, community colleges, career and technical programs, high schools, businesses, etc.
4. Promote partnerships between businesses, local school districts and the local colleges.
5. Encourage programs and certifications in specific disciplines such as engineering, information technology, and robotics. Discussion should take place regarding programs and certifications in bio-technology and medical devices. These programs and certifications are needed for students and non-traditional students like retired military.
6. Promote increased commercialization of declassified military research and development. Focus on target areas of aerospace/aviation, robotics and remotely operated systems, and businesses that support or supply these areas, as much opportunity exists for expansion.
7. Replicate Florida High Tech Corridors in the region with IHMC, UWF, UF and FSU.

Higher Education

Introduction
There will be a demand for workers with specialized skill sets to meet the demand of growth and emerging industries in the region. Greater collaboration between education, business and the military would facilitate the development of new programs of study, and enhance existing, to meet current and future demand.

Institutions such as the Innovation Institute at the University of West Florida offer programs that broaden the higher education experience. UWF is beginning to offer courses through Florida Virtual Campus as well as Complete Florida, a forum for people to finish their education. Both of these programs will open doors for more people to complete university degrees.

Military installations are also locations for a myriad of educational programs such as the University of Florida Research and Engineering Education Facility (REEF) located on Eglin Air Force Base. The REEF offers courses that may lead to Masters and Doctorate degree programs in Mechanical Engineering, Aerospace Engineering, Electrical and Computer Engineering, and Industrial and Systems Engineering.

Many educational institutions throughout the region have been established to meet the demand of emerging industries and jobs, such as:

- UWF Center for entrepreneurship-
- Santa Rosa Locklin Tech
- Emerald Coast Technical College in Defuniak Springs
- UWF College of Health
  NW Florida State College in Niceville
- LECOM College of Medicine
- FAMU Pharmacy in Crestview
- Embry Riddle Aeronautical in Crestview

Formatted: Font: (Default) Tahoma, 12 pt

Formatted: List Paragraph, Bulleted + Level: 1 + Aligned at: 0.25" + Indent at: 0.5"

Formatted: Font: (Default) Tahoma, 12 pt

2. Innovation & Economic Development - Goals

c. Goal 2.1: Provide funding for ongoing economic development activities.

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

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

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

e. Goal 2.3: Build seamless information technology infrastructure.

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

f. Goal 2.4: Encourage location and expansion of target industries identified by Florida's Great Northwest, including, but not limited to:
   a. Aviation, Aerospace & Defense

Commented [d1]: Are target industries still true? Is it enterprise florida's target industries?

b. Advanced Manufacturing
c. Health Science
d. Renewable Energy
e. Transportation, Distribution & Logistics

Formatted: Indent: Left: 1", No bullets or numbering

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

i. Objective 2.5.1: Complete an asset map of the region identifying incubators; venture capital organizations; and urban centers that provide live/work opportunities.
ii. Establish funding mechanisms for entrepreneurial cultivation.

Introduction
The purpose of the Innovation & Economic Development Pillar is to strengthen Florida's leadership expanding and emerging talent and innovation clusters and help transition established clusters to serve new markets. Diversification is a vital component to the resilience of a region's economy because a large, diversified economic structure creates stability and national competiveness. A cluster targeted industry development strategy can accelerate the diversification of the Regional economy by focusing on high-wage, high value-added cluster economic growth.

To do this we must grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture and expand innovation business.

We must also expand the number of Florida businesses selling goods and services internationally and diversify the markets they serve. This means we will have to brand and market Florida as the best state for business. ~~Additionally, UWF is currently developing curriculum for an entrepreneurship program under the College of Business, which will increase potential for additional new small businesses in the region.~~

In Northwest Florida, a number of local, regional and state organizations are working to achieve economic development goals.
Local economic development organizations in the region include:

- Okaloosa County Economic Development Council (www.florida-edc.org)
- FloridaWest Economic Development Alliance(www.floridawesteda.com/)
- Santa Rosa Economic Development (www.santarosaedo.com/)
- Walton County Economic Development Alliance (www.wcedafl.com)
- Bay County Economic Development Alliance (www.BayEDA.com)
- Holmes County Chamber of Commerce (www.holmescountyonline.com)
- Washington County Chamber of Commerce (www.washcomall.com)

Regional economic development organizations include:

- Florida's Great Northwest (www.floridasgreatnorthwest.com)
- University of West Florida Haas Center for Business Research and Economic Development (www.haas.uwf.edu)
- West Florida Regional Planning Council (www.wfrpc.org)
- iTEN Wired (www.itenwired.com)
- Northwest Florida Manufacturing Council (www.nwfmc.org)
- Innovation Coast (http://www.innovationcoast.com/)
- CareerSource Florida Workforce Investment Boards (http://careersourceflorida.com/)

3. Infrastructure & Growth Leadership - Goals

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

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

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

iii. Objective 3.1.3: Create an inventory of housing alternatives, which can meet the long-term needs of the Northwest Florida region allowing citizens to live and work in the same community.

i. Goal 3.2: Develop economic clusters to diversify our economy beyond tourism and military support.

i. Objective 3.2.1: Enhance various sectors of the economy with clustered development of similar industries.

j. Goal 3.3: Create robust regional emergency management and preparedness to reduce recovery period after natural disaster or man-made hazard.

ii. Objective 3.2.2: Strengthen electrical infrastructure against severe weather to improve reliability.

Objective 3.2.3: Allocate investments and increase technological capacity in emergency management and preparedness infrastructure to keep pace with additional populations and new development in West Florida

INTRODUCTION

The purpose of the Infrastructure & Growth Leadership Pillar is to coordinate decision making and investments for economic development, land use, industrial site certification, transportation, infrastructure housing, water, energy, natural resources, workforce and community development at the statewide, regional, and local levels.

This means we must develop and maintain multi-modal, interconnected trade and transportation systems to support a prosperous, globally competitive economy.

We must also develop and maintain a cutting-edge telecommunication infrastructure, such as broadband and internet, especially in rural and underserved communities.

In order to power any new development we need to develop and maintain diverse, reliable, and cost effective energy sources and systems to meet Florida's economic and environmental goals.

Escambia County

a. Description of facilities in the area:

Gulf Power Company's electrical facilities providing service in Escambia County consist of 26 distribution substations, 7 transmission substations, one generating plant and over 255 miles of high voltage transmission line. Gulf Power's total peak electrical demand in the county is 876 megawatts. Gulf Power Company shares in providing service to the customers in the northern part of the county with Escambia River Electric Cooperative.

b. Potential growth in the area:

Although Escambia County is continuing to grow, Gulf Power's existing substation transformation and distribution facilities are adequate to serve these areas for the near term.

c. Five year substation plan:

Gulf Power does not foresee the need to construct any new substations in Escambia County for the next five years.

Santa Rosa County

a. Description of facilities in the area:

Gulf Power Company's electrical facilities providing service in Santa Rosa County consist of 14 distribution substations, 4 transmission substations, one generating plant, and over 264 miles of high voltage transmission line. Gulf Power's total peak electrical demand in the county is approximately 408 megawatts. Gulf Power Company shares in providing service to customers in the northern part of the county with Escambia River Electric Cooperative (EREC) and in the eastern part of the county with Choctawhatchee Electric Cooperative, Inc. (CHELCO).

b. Potential growth in the area:

Although Santa Rosa County is continuing to grow, Gulf Power's existing substation transformation and distribution facilities are adequate to serve these areas for the near term.

c. Five year substation plan:

Gulf Power does not foresee the need to construct any new substations in Santa Rosa County for the next five years.

Okaloosa County

a. Description of facilities in the area:

The electrical infrastructure serving Okaloosa County is provided by both Gulf Power and Choctawhatchee Electric Cooperative (CHELCO). Gulf Power's electrical facilities consist of 20 distribution substations, 3 transmission substation, and more than 248 miles of high voltage transmission line. The total peak load for the county is 574 megawatts (Gulf Power 499 MW, CHELCO: 75 MW). CHELCO's facilities include five distribution substations and more than 60 miles of high voltage transmission line. Gulf Power serves the majority of the county with CHELCO serving primarily east of Niceville and from North Crestview to the Alabama state line.

b. Potential growth in the area:

The general growth potential in Okaloosa County is predominately in the areas surrounding Crestview. Gulf Power is looking to expand its substation capacity west of Hwy 85 in the vicinity of PJ Adams Rd. CHELCO's existing substations and distribution facilities can accommodate considerable future growth with only minor upgrades.

c. Five year substation plan:

Gulf Power plans to install a new distribution substation adjacent to its 230 kV line west of Hwy 85 and south of PJ Adams Rd. This substation will be constructed in late 2015 and early 2016. Although CHELCO has made upgrades to an existing substation and lines in the Auburn area over the last few years to accommodate additional growth, the cooperative does not anticipates the need to construct any new substations in Okaloosa County in the five years.

Gulf Power's Five Year Plan seems adequate for the time being, as do the plans of the electric cooperatives serving the region. The companies will continue working in conjunction to carefully survey future needs in the rural areas of the region as growth spreads northward from the coastal regions.

Walton County

a. Description of facilities in the area:

The electrical infrastructure serving Walton County is provided by both Choctawhatchee Electric Cooperative (CHELCO) and Gulf Power. CHELCO's facilities include 17 distribution substations, one transmission substation, and more than 169 miles of high voltage transmission line (owned by PowerSouth Energy Cooperative, the generation and transmission agent for CHELCO). Gulf Power's electrical facilities consist of 5 distribution substations, 2 transmission substations, and more than 160 miles of high voltage transmission line. The total peak load for the county is 288 megawatts (CHELCO: 180 MW, Gulf Power 108 MW). CHELCO serves the majority of the county with Gulf Power serving primarily in incorporated areas of Paxton, DeFuniak Springs, Miramar Beach, and Sandestin.

b. Potential growth in the area:

The primary potential growth areas in Walton County include south Walton, Freeport and Mossy Head. As a result, growth will more substantially impact the facilities of CHELCO. CHELCO's existing substations and distribution facilities can accommodate considerable future growth with only minor upgrades. In the areas around Destin and Phillips Inlet, Gulf Power's existing substation transformation and distribution facilities are adequate to provide electricity in the areas for the near term.

c. Five year substation plan:

With the additional load growth in the central and northern part of the county, CHELCO is planning to construct two additional substations over the next five years. Gulf Power does not foresee the need to construct any new substations in Walton County for the next five years.

Holmes County

a. Description of facilities in the area:

Gulf Power's electrical facilities providing service in Holmes County consist of 4 distribution substations, 1 transmission substation, and over 61 miles of high voltage transmission line. Gulf Power's total peak electrical demand in the county is approximately 30 megawatts. Gulf Power shares in providing service to the customers in the county with West Florida Electric Cooperative and CHELCO.

b. Potential growth in the area:

The growth potential in Holmes County is limited due to its expansive rural areas. Gulf Power's existing substation transformation and distribution facilities are adequate to serve these areas for the near term.

c. Five year substation plan:

Gulf Power does not foresee the need to construct any new substations in Holmes County for the next five years.

Washington County

a. Description of facilities in the area:

Gulf Power's electrical facilities providing service in Washington County consist of 3 distribution substations, 2 transmission substations, and over 75 miles of high voltage transmission line. Gulf Power's total peak electrical demand in the county is approximately 61 megawatts. Gulf Power shares in providing service to the customers in the northern part of the county with West Florida Electric Cooperative while service in the southern part of the county is shared between Gulf Power and Gulf Coast Electric Cooperative.

b. Potential growth in the area:

The growth potential in Washington County is limited due to its expansive rural areas. The majority of the growth in Washington County will likely affect West Florida Electric and Gulf Coast Electric.

c. Five year substation plan:

Gulf Power does not foresee a need to construct a new substation in Washington County over the next five years.

Bay County

a. Description of facilities in the area:

Facilities providing service in Bay County consist of 18 distribution substations, 63 transmission substations, 1 generating plant, and over 303 miles of high voltage transmission line. Gulf Power's total peak electrical demand in the county is approximately 542 megawatts. Gulf Power shares in providing service to the customers in the northern part of the county with Gulf Coast Electric Cooperative.

b. Potential growth in the area:

Although Bay County is continuing to grow, Gulf Power's existing substation transformation and distribution facilities are adequate to serve these areas for the near term.

c. Five year substation plan:

Gulf Power does not foresee the need to construct any new substations in Bay County for the next five years.

Other Infrastructure

The CEDS committee reviewed the list of strategic findings and assembled a list of vital projects and a list of suggested projects. To achieve the most important goals and objectives in the region and enhance the region's competitiveness, there are several vital projects that can be identified and/or organized into several categories:

Cluster Identification

Diversification is crucial to the success and sustainability of the region. By diversifying our economy, the area can avoid potential paralysis resulting from a major hurricane which can virtually shut down tourism, retail and service industries. Manmade disasters can also have a major impact on the economy. The 2010 BP Oil Spill impacted tourism and the fishing industries extremely hard. Northwest Florida needs to encourage and expand its military capacity of R&D projects and keep this important cluster. Military for the region has been a mainstay for years and brings in additional spending and support industries. An emerging cluster development for the Northwest Florida region is focused on commercial aviation and in particular OEMs for industry diversification. Commercial aviation suppliers from all sectors are a growing target for Northwest Florida. With the migration of commercial aviation OEM operations to the Southeastern U.S., including Airbus' first U.S. final assembly line under construction in Mobile, Al, opportunities for growth in this sector are being realized throughout the region. Not only are there opportunities for new development, the presence of regional commercial aviation assembly offers existing defense aviation related firms with new opportunities for diversification through commercial aviation work. Supporting both military and commercial applications is the development of the unmanned technologies. The development of unmanned vehicles includes Unmanned Submersible Vehicles, or USVs, out of the Panama City area; robotics out of the Pensacola area; and Autonomous Vehicle Systems (AVS) out of the Fort Walton Beach area.

Category 1: Projects that promote economic development and opportunity and initiatives to cultivate merging and promising industries and strengthen the emerging competitive clusters in the region.

Applicant projects should support the effort to expand the existing capacity of targeted industries such as aviation, aerospace and defense as needed, and to develop additional targets, including emerging industries such as clean technology, financial services, information technology, life sciences, medical devices and medical technology. For example:

- Pensacola Technology Campus – located in downtown Pensacola on approximately 10 acres and primed to serve as location for innovation-based businesses. The project is a joint venture led by the Pensacola-Escambia Promotion and Development Commission (PEDC) in partnership with the Greater Pensacola Chamber, Escambia County and the City of Pensacola. The Technology Park was established in 2010 with a $2M grant from the U.S. Economic Development Administration with land donation and infrastructure funding by the City of Pensacola and Escambia County. The Tech Campus is designed to accommodate and support approximately 1.6 million square feet of Class A Office space. Under a memorandum of understanding with the PEDC, Space Florida has recently agreed to fund and build the first 80,000 square foot multi-tenant office building.

- Pensacola International Airport (PNS) Commerce Park – owned and operated by the City of Pensacola has 350+ acres of land available for development of aviation related Maintenance, ~~,~~Repair Overhaul (MRO) facilities, cargo handling, aviation, commerce and mixed use property. 35 developable acres are available with immediate airfield access. The City of Pensacola recently signed an agreement to locate a new Maintenance Hangar development on 18+ acres. PNS spans a total of 1,400 acres and has a 7,004 ft. by 150 ft. runway. The location provides ease of access 2 miles from Interstate 110, 3 miles from Interstate 10, and five miles from the Port of Pensacola, and has Enterprise Zone and Foreign Trade Zone designation.

- The Vince J. Whibbs, Sr. Community Maritime Park is a planned public-private park development on Pensacola's waterfront. The first 80,005 square feet Office/Condo was completed summer 2014 and is fully leased with another 41,850 square feet office development currently under construction. The park has eight additional parcels varying in size that is planned to accommodate upwards of 300,000 square feet of mixed use, plus a hotel and marina. The Maritime Park stadium is currently home to the Pensacola Blue Wahoos baseball team, the AA affiliate of the Cincinnati Reds and has a beautiful Amphitheater that overlooks Pensacola Bay.

- Okaloosa County/Bob Sikes Airport - Construction or expansion of aircraft hangars and improved infrastructure will allow for expansion and retention of businesses that directly do businesses with DOD, thereby enhancing targeted industry of aviation/defense/aerospace sectors such as OEMs

- Holt Industrial Park – The Holt Industrial Park is approximately 116.9 acres, located at the intersection of Interstate 10 and Route 189 in rural, northwest Okaloosa County. This park is the county's only industrial park located directly on Interstate 10 and with an access 0.2 miles from the entrance of the Industrial Park. Holt is 12 miles west of Crestview and 40 miles east of Pensacola. The park is mostly privately-owned with a few acres owned by the Okaloosa Community Development Corporation. The environment is partially wooded with sandy soil and elevations 150-180' above sea level. Current Industrial Park tenants include: Certified Manufacturing, Inc., Tom Hammons Enterprises LLC, Advanced Sawmill Machinery, Anderson Columbia and Lewis Equipment Company. Funding is needed to extend sewer lines to the property.

- Northwest Florida Beaches International Airport – features shovel ready sites that lack available hangars in order to attract aviation and aerospace companies that are engaged in maintenance, repair and overhaul or manufacturing.

- Defuniak Springs Municipal Airport - owned and operated by the City of DeFuniak Springs. The airport serves the general aviation transportation needs of the City and Walton County. In addition to private and recreational flying, the airport also supports business and corporate aviation. The airport is situated on 343 acres of land located approximately 2.5 miles west of the City's Central Business District.

Formatted: List Paragraph, No bullets or numbering

Formatted: List Paragraph, No bullets or numbering

Formatted: No bullets or numbering

Formatted: Indent: Left: 0"

The existing Industrial Parks in the region lack available buildings and in some cases, even the most basic amenities (water/sewer) to attract businesses. In order to attract and retain our target industries, the region needs to modernize, expand and add new capabilities (rail, broadband, fiber-optic cable, etc) to our stable of sites.

Category 2: Projects and programs that expand and broaden the region's infrastructure and improve its efficiency, as well as update current infrastructure deficiencies and address current and future development needs of businesses.

Applicant projects should strive to establish a working partnership between research colleges and universities, private sector research companies and military/federal labs to help strengthen the transfer of research into commercial application. The focus should be on projects such as incubators and/or research and development collaborations that build up targeted sectors. For example:

- Washington County Industrial Park – road/water/sewer/rail spur improvements will allow a company to open a new manufacturing/distribution center employing more than 120 people at a rate of 115% over the average wage in Washington County.
- Autonomous Vehicle Center - the University of Florida, College of Engineering's Research Engineering and Education Facility outside of Eglin AFB West Gate will be designed to support the growing research and testing needs of the Munitions Directorate of the Air Force Research Lab (AFRL) in the arena of micro-unmanned air and ground vehicle systems (UAGVS). The facility aims to be part of a collaborative environment where researchers and engineers from private industry, government and academia are able to come together and further the development of UAGVS technology.

Housing

Workforce housing is critical to create economic diversity and prosperity in the region. This will be monitored on a continuing basis.

4. Business Climate & Competitiveness - Goals

k. Goal 4.1: Encourage local governments to develop and implement streamlined development approval procedures.

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

l. Goal 4.2: Monitor CEDS Performance Measures.

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

j. Goal 4.3: Develop projects and programs that support existing and new business.

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

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

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

ii. Objective 4.4.2: Develop a sustainable regional economy that creates and strengthens a technology diverse group of targeted industry sectors and innovative entrepreneurs who help ensure the growth of intellectual capital throughout the seven county region of Northwest Florida.

Introduction

The purpose of the Business Climate and Competitiveness Pillar is to Renovate permitting, development and other regulatory processes to meet changing business needs and provide a predicable legal and regulatory environment.

This will help ensure state, regional and local agencies provide collaborative, seamless, consistent and timely customer service to businesses. It will also require that we reduce barriers to small/minority business and entrepreneurial growth.

If we expand opportunities for access to capital for businesses throughout their life cycle then we can develop a formula whereby success is attainable. We will have to work with industry to ensure property and health insurance rates are competitive with other large states. Lastly we must develop a government revenue structure that encourages business growth and development.

The vision for 2016 is to grow a vibrant and sustainable economy for all seven counties in the West Florida Regional Planning Council's territory that creates nationally and globally competitive advantages for the development of key industry clusters, increases the income and prosperity of workers and families, ensures healthy communities and a vibrant quality of life, and preserves the natural beauty and resources of the region.

The vision grows a sustainable economy throughout West Florida that embraces the rural, suburban and urban components of the region. The strategy includes:

- Lessening the burden of government by focusing on business development that complements West Florida's existing infrastructure, matches Florida's competitive strengths, and minimizes the reliance on incentives for business development.

Business Development

One of the leading clusters in the region includes aviation, aerospace and defense industries. The region must seek to strengthen this cluster and support the creation of new companies in these sectors. In addition, emerging sectors such as financial services, information technology, life sciences, medical devices and medical technology will enable the regional economy to become sustainable into the future. Other sectors that contribute to the regional economy are tourism, distribution services, construction services and agriculture and aquaculture. Agriculture in the region may become a part of the future development of the alternative energy industry.

5. Civic & Governance Systems - Goals

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

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

m. Goal 5.2: Redevelop brownfields sites into valuable pieces of real estate to benefit communities, local businesses, the economy, and the region.

i. Objective 5.2.1: redevelop brownfields sites in a way that best serves the communities in the region to promote meaningful economic growth and to create new jobs, stimulate economic growth, and improve the quality of life in the region.

n. Goal 5.3: Improve regional coordination of Emergency Management and Preparedness Planning to reduce community vulnerability following a natural disaster or man-made hazard.

i. Objective 5.2.2: Support comprehensive emergency management planning effort to enhance the region's resiliency to disruptions specifically on business operations.

ii. Objective 5.2.3: Review and improve Local Mitigation Strategies (LMS) including funding opportunities to support development of LMS.

Introduction

The purpose of the Civic and Governance Systems Pillar is to support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life.

In order to accomplish this goal we must improve the efficiency and effectiveness of government agencies at all levels. We will also have to invest in strategic statewide and regional economic development priorities.

The Economic viability and resilience of the region heavily depends on the military. While other economic sectors may experience temporary downturns, the region's military installations continue to be the prime generators of the economy supporting active military, civil service, military dependents, and retired and/or separated military personnel. The presence of the multi-service installations results in a greater density of technology-based and defense-contracting firms creating industry clusters. Not only do these military installations provide a direct economic impact but also an indirect impact in the local economies with a ripple effect of military spending. In order for the economy to remain strong and viable in the future, the region must continue to support the retention and expansion of the military missions and to nurture the relationships with the communities that house them.

Land Use Planning and Economic Development

Land use decisions impact economic sustainability. Land use decisions help or hinder economic growth. Land must be available and zoned appropriately to provide for growth. Land use decisions affect quality of life and a high quality of life is needed to attract new companies and professionals to the region. In order to promote a high quality of life, land use decisions must appropriately address issues like: parks and recreation, workforce housing, transportation facilities, and densities.

Emergency Management

Hurricane vulnerability and flooding is a key regional issue for both homeowners and businesses and for West Florida's economy. The disruptions caused by active hurricane seasons can significantly impact West Florida's competitive advantage. Active emergency management planning that is up to date on mitigation strategies, current population growth, infrastructure needs, and technological capacity will greatly improve the region's ability to quickly recover from a disruption. West Florida should be operating robust Emergency Management Agencies, which have Local Mitigation Strategies (LMS) in place designed to reduce community vulnerability to the impacts of identified natural and man-made hazards. The Florida Division of Emergency Management, Division of Community Planning and Department of Transportation, in coordination with the Regional Planning Council, have developed the Florida Statewide Regional Evacuation Study Program for the West Florida Region. This report updates the region's evacuation population estimates, evacuation clearance times and public shelter demands. Originally released on October 5, 2010, the study covers Bay, Escambia, Holmes, Okaloosa, Santa Rosa, Walton and Washington counties and their respective municipalities, and is updated as needed.

Brownfields Cleanup Revolving Loan Fund (BCRLF) Grant

The West Florida Regional Planning Council received a Brownfields Cleanup Revolving Loan Fund (BCRLF) grant in order to safely clean up, and sustainably reuse brownfields. We also received an Assessment grant from EPA to be used in the region. A brownfields site is real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant. These potentially contaminated sites must be cleaned up and redeveloped in order to create new jobs, stimulate economic growth, and improve the quality of life in the region. The Assessment grant was used to determine the contaminants at 5 sites. Currently, WFRPC is working to leverage the RLF funding into site clean-up for these identified sites.

West Florida Regional Planning Council Community Investment Committee:

1. Economic Development (CEDS Member): TBD
2. Real Estate: Randy Butler, DR Horton, Inc.
3. Banking: Jason Williams, Gulf Coast Community Bank
4. Business Owner: Bill Garvie
5. Legal: Nathan Bess, Aylstock, Witkin, Kreis & Overholts, PLLC
6. RPC Council member: TBD

RLF Fund Manager:
James Harris, Bank of Pensacola

6. Quality of Life & Quality Places - Goals

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

i. Objective 6.1.1: Provide for connectivity of targeted conservation and preservation lands on both public and private lands.
ii. Objective 6.1.2: Increase conservation lands by supporting local government incentives through comprehensive plan provisions, tax incentives, and other innovative programs to encourage landowners to participate in conservation programs.
iii. Objective 6.1.3: Continue to build on the strengths of the tourism sector to contribute to a sustainable regional economy.

iv. Objective 6.1.4: Focus improvements on our regions' downtown areas and historical preservation sites are vital to improving both cultural tourism resources and the overall quality of life in West Florida.

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

i. Objective 6.2.1: Integrate alternative modes of travel, including walkability, in new and existing communities.
ii. Objective 6.2.2: Promote safe, healthy built environments and ensure access to high quality health care, including primary, specialty, and ancillary services.
iii. Objective 6.2.3: Develop a sustainable regional economy that creates and strengthens a technology diverse group of targeted industry sectors and innovative entrepreneurs who help ensure the growth of intellectual capital throughout the seven county region of Northwest Florida

Introduction
The purpose of the Quality of Life and Quality Places Pillar is to create and sustain vibrant, safe and healthy communities that attract workers, business, residents and visitors.

We must ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions.

This will also mean we need to promote, develop, protect and leverage Florida's natural area and cultural assets in a sustainable manner.

Marketing the Region

A number of marketing initiatives are underway in the region. Branding the region continues to be a high priority. A number of collaborative efforts have yielded promising results. The region must build on collaborative marketing efforts and expand them to include partnerships with less traditional marketing organizations such as the Tourist Development Corporations (TDCs). Marketing efforts should focus on quality of life and quality of place factors that make the Northwest Florida Region a great place to live and raise a family.

Tourism

Tourism is one of the top three economic sectors and a vital part of the economy in the region. Tourism provides tremendous exposure for the area. Tourism often results in new residents when visitors like what they see and move to the area. Due to the increase in vacation popularity, the region is experiencing extended tourism seasons. Continuing to promote the quality of place will increase resiliency by creating longer tourist seasons and potential year round visitation. One of the challenges facing the regional economy is the seasonal employment associated with the tourism sector. Employment opportunities must be developed for tourism workers during shoulder times.

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

The plan of action, as described in the Comprehensive Economic Development Strategy, implements the goals and objectives of the Comprehensive Economic Development Strategy in a manner that -

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

   Action Steps

   A. Promote better collaboration between education, business and the military
   B. Encourage four year universities to develop or expand programs in:
      i. Special operations technology
      ii. Human performance
      iii. Aviation aerospace to include defense and development of nano technology
      iv. Hospitality management
      v. Information technology
      vi. Alternative energy

   C. Encourage career and technical education and certification programs through career academies and post-secondary

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

   Action Steps

   A. ~~Create a regional economic development initiative to support the activities of the Florida Chamber of Commerce Northwest Florida Regional Action Council. The Regional Action Council is designed to assist and grow regional support of and activity in pro-business political, legislative and grassroots efforts through active business participation in the region~~.
   B. Connect and coordinate the variety of economic development taking place within the region through a shared long-range vision of success. Inform and engage the public, the business and military community and elected officials in the region.

~~C. Work with local governments, regional and state agencies to develop and implement specific plans to implement the preferred, sustainable Emerald Coast economic development vision.~~

~~D.~~C. Identify and build opportunities for greater regional competitiveness through communication and collaboration with those outside the region.

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

Action Steps

A. Locate, analyze and communicate solutions and programs for Workforce Housing.
   - i. Remove the cap from the Housing Trust Fund and fully fund affordable housing.
   - ii. Work with cities and counties to identify and remove regulatory barriers, and set up fast-track programs for permitting of Workforce Housing.
   - iii. Develop ways to share the up-front costs for builders of workforce housing.
   - iv. Educate businesses on programs such as Employer Assisted Housing that will help recruit and retain employees.
   - v. Develop Community Land Trusts to keep housing affordable.
   - vi. Identify workforce housing alternatives i.e. densities, mixed-use and inclusionary.
   - vii. Develop a menu of incentive programs for affordable housing and make it available to jurisdictions so they can select the programs that best fit their situation.

B. Educate county and city officials and the general public on what affordable housing is and possible solutions for developing workforce housing.
C. Coordinate with Regional Economic Development Coalition to determine future needs.
D. Coordinate with the military on their housing needs.
E. Assist counties in developing housing assistance programs as required by legislation.
F. Look for opportunities with CWHIP, a state pilot program to assist with affordable housing.
G. Support development of live-work centers.
H. Continue to work to reduce regulatory barriers i.e. taxes and insurance costs.
I. There is a lack of piped utilities and/or broadband access to many major industrial sites and commercial nodes
J. The region has an enviable proximity to two deepwater ports and three major airports as well as an extensive rail system. The parallel routes of I-10 and

the mainline of CSX rail provide the capacity needed to access the existing deepwater Port of Pensacola.

K. Create expedited permitting processes for economic development projects at the local level that allow a business to receive a development order or building permit in less than 4 weeks, in order to compete with neighboring states which have the ability to process permits in a matter of days, not weeks.
L. Coordinate with utility companies to review and improve capacity of water and electrical infrastructure to withstand natural disasters.
M. Research funding opportunities for additional investments and technological capacity in emergency management and preparedness infrastructure are needed to keep pace with the additional populations

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

Action Steps

A. Diversify and strengthen the region's economy by targeting industry sectors such as the existing aviation, aerospace and defense industries, and the emerging and reemerging industries that include: financial services, information technology, life sciences, medical devices and medical technology.
B. Support the development of innovative entrepreneurial companies that introduce new technologies to the region.
   i. Promote local and state legislation that addresses business related issues including the taxes, insurance costs, and brownfields.
   ii. Increase the rate of small business formation – and decrease the failure rate – by addressing the problems that young technology-based businesses face in obtaining appropriate technology, market information, management assistance and access to capital. Utilize the expertise of the Small Business Development Centers (SBDC) in assisting small business centers or "incubators" that house potential new and sustainable business developments.
   iii. Increase access to venture capital
   iv. Support research

C. Encourage the development of new or expanding business and industrial parks and sites in the region in order to support knowledge-based industries.
   i. Pursue investment companies outside the area that have the experience with speculative buildings and sites for new businesses.
   ii. Persuade local developers to try new construction techniques and to develop larger sites.
   iii. Create an environment and incentives to encourage developers to develop larger sites.

D. Encourage local and state efforts to inventory commercial and industrial sites and buildings.
E. Explore opportunities to support the Energy Resiliency Plan as adopted in 2013.

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

Action Steps

A. Encourage continued participation in the Northwest Florida Defense Coalition and the Defense Support Initiative to address housing, buffers, family support needs and regional grant opportunities.
B. Encourage links between the military, government, education, and business.
C. Nurture the relationship with the Florida Defense Alliance and encourage continued state support of the Defense Grants Program during BRAC and following BRAC supporting military communities.

Action Steps

A. Ensure that adequate industrial and commercial sites are incorporated into the Regional Action Council initiatives
B. Ensure comprehensive plans designate space for industrial and large commercial use
C. Coordinate and link economic development efforts with related land use planning
D. Apply sector planning principles regionally and connect to planning for transportation facilities
E. Encourage the development of live-work centers
F. Encourage the inclusion of Economic Elements in comprehensive plans.

Action Steps

A. Provide funding to appropriate sites through the RLF cleanup fund,
B. Continue to work with the Florida Brownfields Association to strengthen ties and enhance redevelopment of potential brownfields sites,
C. Create a public outreach and public involvement plan to promote and advance the brownfields RLF program in both the local and private sectors.
D. Create a Community Investment Committee (CIC) to review and select applicants to receive RLF loan funds.

Action Steps

A. Support a host of emergency management training, inspection, planning and evaluation initiatives that meet both state and federal requirements.
B. Research and apply for funding opportunities to support more robust Local Mitigation Strategies.

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

Action Steps

A. Continue to work on the branding of the Emerald Coast in regards to tourism and business opportunities
B. Continue to fund Visit Florida and use Visit Florida to leverage local dollars
C. Identify recurring sources of funding for ongoing beach renourishment to include the encouragement of legislative funding for beach renourishment.
D. Attract industries that are involved in leisure activities
E. Promote nontraditional tourism, i.e. heritage tourism, ecotourism, agriculture tourism
F. Evaluate and make recommendations on how to use waterways for ecotourism
G. Attract outfitters that will strengthen ecotourism and cultural tourism
H. Look for ways to address the issues involved with seasonal employment
I. Explore nontraditional housing to support the tourism industry
J. Explore strategies to incorporate "greening" in tourism
   Action Items
   Identify and market targeted domestic and international trade and investors that will help strengthen and diversify the regional economy.
K. Promote our exceptional school systems and our post-secondary universities as a tool to strengthening our efforts to create a self-sustaining knowledge-based economy.
L. Utilize traditional and non-traditional partnerships working together to market the region and promote a diverse business climate for the region. Nontraditional partners include organizations like the TDC's and the Chambers of Commerce.

The Comprehensive Economic Development Strategy must also contain a section that discusses the methodology for cooperating and integrating the Comprehensive Economic Development Strategy with a State's economic development priorities.

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

The Comprehensive Economic Development Strategy must contain a section which identifies regional projects, programs and activities designed to implement the Goals and Objectives of the Comprehensive Economic Development Strategy. This section should identify and describe:

Vital Projects:

Formatted: Font: Bold

A prioritization of vetted and developing vital projects, programs, and activities that address the region's greatest needs or that will best enhance the region's competitiveness. These projects are a top priority and assist in implementing actionable *items under the six pillars. These can be overarching "themes" for regional economic development success and is expected to include components. Funding sources should not be limited to EDA programs.*

1. Talent Supply & Education
2. Innovation & Economic Development
3. Infrastructure & Growth Leadership
4. Business Climate & Competitiveness
5. Civic & Governance Systems
6. Quality of Life & Quality Places

Bay County

- Northwest Florida Beaches International Airport Aviation Park - The international airport, constructed in 2010, features a 10,000 foot runway (expandable to 12,000 feet) and other assets required to create an aerospace and aviation hub. Additional infrastructure and hangars are required to accommodate private sector companies in order to facilitate high wage job creation.

Escambia County

- Pensacola Technology Campus – will serve to attract and grow innovation-based businesses. The project is a joint venture led by the Pensacola-Escambia Promotion and Development Commission (PEDC) in partnership with the Greater Pensacola Chamber, Escambia County and the City of Pensacola. The Technology Park was established in 2010 with a $2M grant from the U.S. Economic Development Administration with land donation and infrastructure funding by the City of Pensacola and Escambia County. The Tech Campus is designed to accommodate and support approximately 1.6 million square feet of Class A Office space. Collaborative projects such as the PEDC and Space Florida to initiate the first 80,000 square foot multi-tenant office building facilitate and support growth of innovation and technology based target industries.
- Pensacola International Airport (PNS) Commerce Park – is a prime location for attraction of aviation related Maintenance, Repair, Overhaul (MRO) facilities, cargo handling, aviation, commerce and mixed use tenants. 35 developable acres are available with immediate airfield access. PNS spans a total of 1,400 acres and has a 7,004 ft. by 150 ft. runway. The location provides ease of access 2 miles from Interstate 110, 3 miles from Interstate 10, and five miles from the Port of Pensacola, and has Enterprise Zone and Foreign Trade Zone designation.
- Escambia County/Phase Two-Heritage Oaks Commerce Park – will encompass an additional 250 acres. The first phase of Heritage Oaks Commerce Park saw phenomenal success in creating more than 3400 financial services sector jobs that pay over the local average PCI. The 250 acre expansion of the commerce park with expansion of infrastructure and transportation serves as an opportunity

to build on this success and further employment opportunities in a more rural part of the county – with job creation figures expected to reach 10,000 by 2020.

- City of Pensacola/Small Business Incubator – The Northwest Florida region has seen significant cost overhead increases negatively impacting small businesses over the past three years due to increased hurricane activity. Property and business loss insurance has become prohibitively expensive. The Pensacola State College has dedicated a part of its downtown facility for the development of a Small Business Incubator in partnership with the University of West Florida Small Business Development Center, the City of Pensacola, FloridaWest EDA the Greater Pensacola Chamber of Commerce and Escambia County.

Okaloosa County

- Okaloosa County/Emerald Coast Technology Campus – A joint research and technology education facility for civilian and military community. This would greatly enhance the collaboration between the military and the private sector, thereby serving to retain the vital role that the military plays in the region's economy.
- Okaloosa Industrial Air Park County/Bob Sikes Airport - Construction or expansion of aircraft hangars and improved infrastructure will allow for expansion and retention of businesses that directly do businesses with DOD, thereby enhancing targeted industry of aviation/defense/aerospace sectors such as OEMs. Within the park, 135 acres of the property has been certified as an industrial park under the Florida First Sites program. The property features an 8,000 feet runway with 2,000 foot planned expansion
- Okaloosa County / Autonomous Vehicle Center - the University of Florida College of Engineering's Research Engineering and Education Facility outside of Eglin AFB West Gate will be designed to support the growing research and testing needs of the Munitions Directorate of the Air Force Research Lab (AFRL) in the arena of micro-unmanned air and ground vehicle systems (UAGVS). The facility aims to be part of a collaborative environment where researchers and engineers from private industry, government and academia are able to come together and further the development of UAGVS technology.

Santa Rosa County

- Jeff Ates Road Industrial Park – This industrial park features 132.4 acres of developable property off of US Highway 90 in Milton, FL and is certified under the Florida First Site program.
- Northwest Florida Industrial Park – This industrial site features 88 acres of developable property adjacent to I-10 and is certified by the Florida First Sites program.
- Whiting Aviation Park – A planned 269-acre commercial/industrial park adjacent to Naval Air Station Whiting Field in Northwest Florida. Through a Limited-Access Use Agreement between Santa Rosa County and the United States Navy, future civilian tenants of the Aviation Park will be able to use the Navy's airfield

facilities. Once developed, the park is expected to attract a mixture of aviation related commercial and industrial development as well as non-aviation development. Manufacturing, maintenance, repair, and overhaul type aviation operations will be the primary target activity.

Walton County

- Defuniak Springs Municipal Airport – The airport features an industrial park which has been certified under the Florida First Sites program. The park features two developable sites totaling 297 acres, located adjacent to the existing airport footprint offering space for hangars and fleet maintenance. The airport is also embarking on a runway extension of 5,000 feet.
- Walton County Mossy Head Industrial Park Infrastructure Development –This 315 acre park is owned by the Walton County Board of County Commissioners and is located at the interchange of Hwy 285 and I10, and is bordered by Hwy 90 and a CSX mainline. The park has superior access to transportation infrastructure, and analysis conducted by Garnet Consulting Services, Inc. in 2003 estimates that the park, fully developed, could create up 2800-3300 jobs. The analysis also identified the following uses for the park 40% manufacturing, 40% warehouse and distribution, and 20% office/R&D. While the Walton County Board of County Commissioners has committed to constructing as much infrastructure as possible, additional funds are required in order to create true "shovel ready" sites and recruit businesses that are creating jobs in the targeted sectors.

Regional

–

Transformational Economic Development – The University of West Florida Haas Center for Business Research and Economic Development is the recipient of U.S. Economic Development Administration award, "Regional Strategy for Economic Transformation." This grant will allow UWF and its partner Florida's Great Northwest to develop and begin implementation of a regional economic development strategy.

- Florida's Great Northwest is the regional economic development organization serving 13 counties in Northwest Florida. UWF's Haas Center will provide all economic research associated with the project/

Potential Projects:

- All suggested projects, programs and activities that are currently in the development phase in terms of funding, design, permitting, and construction.

- Lead organizations responsibilities for execution of the projects.

Bay County

Formatted: Font: (Default) Tahoma, 12 pt

Formatted: Font: (Default) Tahoma, 12 pt

Formatted: Font: Bold

Formatted: Normal, No bullets or numbering

Formatted: Font: (Default) Tahoma, 12 pt

- Bay County/FSU Research Park – redevelopment of the former Hugh Nelson Industrial Park, including the former U.S. Air Force Fuel Depot in Lynn Haven. A joint effort between FSU, USAF, the Bay County Economic Development Alliance and the City of Lynn Haven would bring more than 200 high skill/high wage jobs to the region in addition to supporting the goals in Category 3. This site also includes 5 miles of rail and an existing pier structure.
- West Bay Target Industry Training Facility and Pilot High Technology Training Program. A joint effort between CareerSource Florida, the St. Joe Company, Gulf Power Company, the Bay County Economic Development Alliance, the Gulf coast Workforce Board, Florida's Great Northwest and Gulf Coast Community College.
- Bay Technology Initiative – Bay County is the missing link and a strategic analysis of its telecommunications infrastructure and connectivity requirements is a high priority to complete the Lambda Rail and broadband infrastructure links throughout the region. Defense grants have been secured for this project and additional funding sources are being identified. A feasibility study, permitting and engineering have all been completed for the project.
- Intermodal Distribution Center – The Panama City Port Authority owns and operates the Center. The Center's shovel-ready sites are currently being developed and 50 acres of the property is certified by the Florida First Sites program.

Escambia County

- Escambia County/Technology Incubator – Northwest Florida has seen a dramatic reduction in employment of several chemical companies as well as full plant closures affecting thousands of workers. However, some of the facilities that have been affected have significant potential to provide assistance to companies engaged in life sciences research and development by providing access to under-utilized facilities. This project would identify facilities that could be utilized for the acceleration/incubation of companies conducting research requiring wet lab space.
- Health Information Technology Infrastructure, Beacon Community Cooperative Agreement Program to build and strengthen a community's health information technology infrastructure and exchange capabilities. Pensacola Bay Area Chamber of Commerce, Strategic Health Intelligence.
- Century Industrial Park - master-planned and developed by the Town of Century with storm water retention in place, has more than 75 public-owned acres suited for a wide variety of industrial and commercial opportunities. Located in Enterprise Zone and designated Foreign Trade Zone off Highway 29 in Century, approximately 34 miles north of I-10 and 18 miles east of I-65.
- The Bluffs (Escambia Industrial Site) - The Pensacola-Escambia Promotion and Development Commission (PEDC) is undertaking master planning of a new mega site in Escambia County to accommodate larger manufacturing/industrial facilities. The initial planning was funded by the State of Florida with the goals of addressing the region's longer range competitiveness and needs for a planned

industrial complex that will attract and retain target industry employers, provide high quality jobs and will also serve as an environmental showcase for present and future generations. The project is anticipated to generate 12k – 15k jobs with a $500M economic impact at 50% build out. Next steps will require additional funding to fill certain voids for extending infrastructure, environmental analysis and more in-depth research of target market recruitment opportunities and subsequent external marketing.

Holmes County

- Holmes County Airport Expansion – 300 acre airport property with 61 acres available for industry. Future expansion for hangars and warehouses assocated with the airport. Water and sewer infrastructure will be needed before more development can take place.
- Holmes County Industrial Park East Side – This 270 acre site includes rail frontage, Highway 90 frontage, and is 3 miles from I-10. Water and sewer will need to be extended from the city of Bonifay. This is an excellent site for both small and large industrial and commercial uses.
- Holmes County Industrial Park West Side – This 12.1 acre site near the town of Ponce de Leon includes a rail spur that will need improvement, as well as additional site work, before it will be ready for redevelopment.

Okaloosa County

- Okaloosa County / Advanced Technology Center - will partner with Eglin AFB for significant energy utilization to develop and test leading edge technologies to reduce utility expenditures, expand renewable energy deployment, and provide critical energy security. Additionally, the Advanced Energy Technology Center (AETC) will provide a state-of-the-art training venue for key energy personnel throughout the country. With education at its core, the AETC will establish and foster dialogue with regional universities to cultivate a culture of collaboration to advance energy initiatives. The Center will forge a strong bond between federal and state agencies, private industry, academia, and NGO's working on various energy and sustainability initiatives.
- Shoal River Ranch Industrial Park – Shoal River Ranch is approximately 10,500 acres with approximately 1,000 acres of industrial-zoned property. The property is located just east of Crestview on US Highway 90, and has more than 12 miles of frontage on I-10. The property is also adjacent to CSX mainline railroad with five miles of rail frontage and is well-suited for distribution-oriented users. Funding is needed to extend water/sewer infrastructure to the property.
- Okaloosa County Small Business Incubator – With more than 90% of Okaloosa County resident being employed by small businesses (businesses with fewer than 20 employees), entrepreneurship and small business is vitally important to the Okaloosa County economy. In order to provide a platform for entrepreneurial

growth and support, a small business incubator is needed. Such an incubator will coordinate with existing small business service providers such as the Small Business Development Center, and provide a venue where valuable advisory and educational services can be housed.

- Venture Hive - The City of Fort Walton Beach, Florida and Miami-based Venture Hive are partnering to create a new home for the veteran entrepreneurship movement with the launch of a customized national accelerator for veteran-owned businesses. Through this public-private partnership, Fort Walton Beach will enable Venture Hive to provide select veteran-owned tech businesses with access to their entrepreneurship education and training programs, and a relevant network to scale their ventures. City of Fort Walton Beach has allocated $500,000 to the initiative and will provide renovated space to house the Venture Hive Fort Walton Beach Accelerator.

Santa Rosa County

- Santa Rosa County/Industrial Park Infrastructure Improvements - The Santa Rosa Industrial Park Jeff Ates Road Site located in East Milton in Santa Rosa County offers 135 acres of flat industrial zoned property for heavy industrial clients. The site has the potential to be rail served by CSX and is located less than 3 miles from Interstate 10. The Santa Rosa Industrial Park site is currently being site certified through the Gulf Power Certification process.
- Defense and Aviation Industrial Park - Whiting Aviation Park a 269 acre Santa Rosa County owned industrial zoned property located adjacent to Naval Air Station Whiting Field. In partnership with the Navy, Santa Rosa County has developed a one of a kind limited use agreement with the Navy for business and industry usage. The property will have access to the 6,000 lf runway and located within an area with over 300 days of VFR flight conditions. The development of the property will help increase the efficiency of the base by allowing less down time for the rework of aircraft, which will further help protect one of the top economic drivers for the Santa Rosa County. Items needed are the infrastructure improvements to enable the development of this industrial park.
- Transportation and Logistics Industrial Park - Northwest Florida Industrial Park located at the Southeast corner of Interstate 10 and Highway 87 at Exit 31 in Santa Rosa County offers easy access to the Gulf Coast and the Southeast. Santa Rosa County owns approximately 90 acres of industrial zoned property that is currently being site certified through the Gulf Power Site Certification process. Infrastructure improvements are required to further enable the development of the park.
- Manufacturing Incubator - In an effort to further diversify the local economy in Santa Rosa County and to partner with our neighboring county we are understand the need for a manufacturing incubator located in the County. The incubator would focus on helping new manufacturing companies entering into the local economy to become an establish company in our area. The

development of this incubator will increase capacity to grow businesses for our area.

- Peter Prince Airport Expansion - Santa Rosa County owns and operates Peter Prince Airport which is located in East Milton along Airport Road in Santa Rosa County. The airport currently supports two fixed based operations (FBOs) and hangers along with aprons are under construction for the airport expansion. Additional acreage is located along the 3,700 lf runway that would be advantageous to aviation/defense related companies. Funding will be needed for infrastructure to create additional shovel ready sites and facilities.
- Santa Rosa County Strategic Plan – This strategic plan will be for Santa Rosa County as a whole, and will also include sub-plans for the north end, central county, and south end of Santa Rosa County.

Walton County

- DeFuniak Springs Municipal Airport Expansion – The City of DeFuniak Springs owns and operates the DeFuniak Springs Municipal Airport which is currently slated for expansion. The construction of commercial hangars, additional aircraft parking, and expanding the runway from 4,147' to 5,000' are planning for the facility. The City also has a 40' parcel "in the fence" that could be used to attract aviation related industry once existing recreational facilities are relocated to another location. Additional funding for infrastructure will be required to create shovel ready sites and building facilities in order to recruit aviation related industry and high wage jobs in this sector.
- Walton County Industrial Park at Freeport Phase II – Infrastructure Development – The Walton County Economic Development Council is the sole owner of a 46 acre industrial Park in Freeport. While the organization has begun to develop the majority of the infrastructure required to attract businesses to this property, additional transportation infrastructure, funds for property acquisition to expand the park and other improvements will most likely be required to attract high wage jobs.
- Paxton Industrial Park - Infrastructure Development - this 19 acre industrial parcel owned by the City of Paxton is intended to recruit businesses and jobs in a very rural area of Walton County.

Regional

- Explore the use of domestic biomass fueled plants in the region. This is where the coal is co-fired along with wood chips, wood pellets, sugar cane pellets, sawdust, urban wood waste, peanut hulls, switchgrass and other biomass.
- Aviation Training Center - In an effort to further meet the workforce demands of aviation/defense companies the development of a training facility is needed to increase the skills required by these firms. Our goal is to develop a training

center that will not only train the current workforce but also the workforce of tomorrow. Item needed is the construction of a facility to train the students.

- Workforce wage analysis and labor study.
- Educational assessment – this will be an assessment of the educational system as it related to workforce development. It will determine if the educational system is developing appropriate workforce, and if there are labor skill needs not being met.

THIS PAGE LEFT BLANK INTENTIONALLY

Appendix
Technical Report

Tables

Illustrations

Appendix - Technical Report:

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

All measurements are by County.

1. Talent Supply & Education

This area reserved for Talent Supply & Education summary discussion.

The military provides ample retirees and/or spouses as well as visitors with high skills who relocate permanently to the area due to quality of place. Post secondary education opportunities abound with the presence of UWF, UF –IFAS, FSU School of Medicine, and GCSC as well as community college campuses sprinkled across the region. The prestigious reputation of Okaloosa and Santa Rosa County schools with their CHOICE Academies receive national attention and recognition and are being reproduced across the state. The economic development partners within the region have forged healthy working relationships, providing numerous opportunities in addition to the traditional chamber of commerce or economic development council outlets. These include, but are not limited to: Opportunity Florida, the economic development agency of the Northwest Rural Area of Opportunity (RAO), DEO, with its vital Rural Economic Development Initiative (REDI), Enterprise Florida offering assistance with the state's Brownfields, and Enterprise Zone programs among many other economic development programs and a strong workforce development initiative through the Agency for Workforce Innovation.

In terms of educational and R&D resources, Florida's northwest region is home to the Institute for Human and Machine Cognition (IHMC), the Supercomputer Research Institute and the University of Florida's Graduate Engineering Research Center. Each of these institutions has received significant notoriety for various industry and research-based partnerships and serves as a tremendous asset to the region. Among the technology-based firms that have chosen to locate in Fort Walton Beach are Boeing, Lockheed-Martin and Raytheon, among others, who contribute to the region's aerospace and defense industry clusters. The construction of the world-renowned Andrews Institute catering to world-class athletes and the expansion of facilities by Sacred Heart and Baptist Hospitals across the region add world-class healthcare options for the region's residents and visitors. Another strength noted is the Base Realignment and Closure of 2005 which did not greatly impact the region. In fact, the region maintained its R&D and established additional facilities - University of Florida's Research Engineering and Educational Facility (REEF).

Although the graduation rates and school attendance records have shown improvements in past years, the WFRPC region is dealing with the same educational issues that plague the rest of the state and nation; lower wages for teachers, declining student test scores, etc. The region is seeing steady improvements in test scores in two counties (Okaloosa and Santa Rosa) and both are maintaining a high reputation for their school systems, Okaloosa has more A-rated schools than any other county in Florida. 'A' rankings are given based on exemplary student performance in reading, writing, science, and mathematics. It has been said that the historic learning gains to individualized teaching, focusing on student's problems and strengths, and increasing the percentage of the education dollar actually devoted to classroom instruction. Okaloosa also had one of the first schools in Florida to offer CHOICE Academies to students. CHOICE is a unique program for high school students. It lets you earn high school credit, college credit and nationally-recognized industry certification – all at the same time. By graduation, students can pursue a four year degree or walk into a job with Microsoft Certification, for example. More and more core curriculums are being offered through CHOICE in Okaloosa and Santa Rosa Counties.

THIS PAGE LEFT BLANK INTENTIONALLY

a. Average Annual Wages

As shown in Table A-1 below, the Average Annual Wages here in the Panhandle track about $5,000 less than the rest of the State of Florida. They have, however, kept pace with the rest of the State over the last ten years.

Table A-1

Average Wages per Job
West Florida Region and State
2001 to 2013

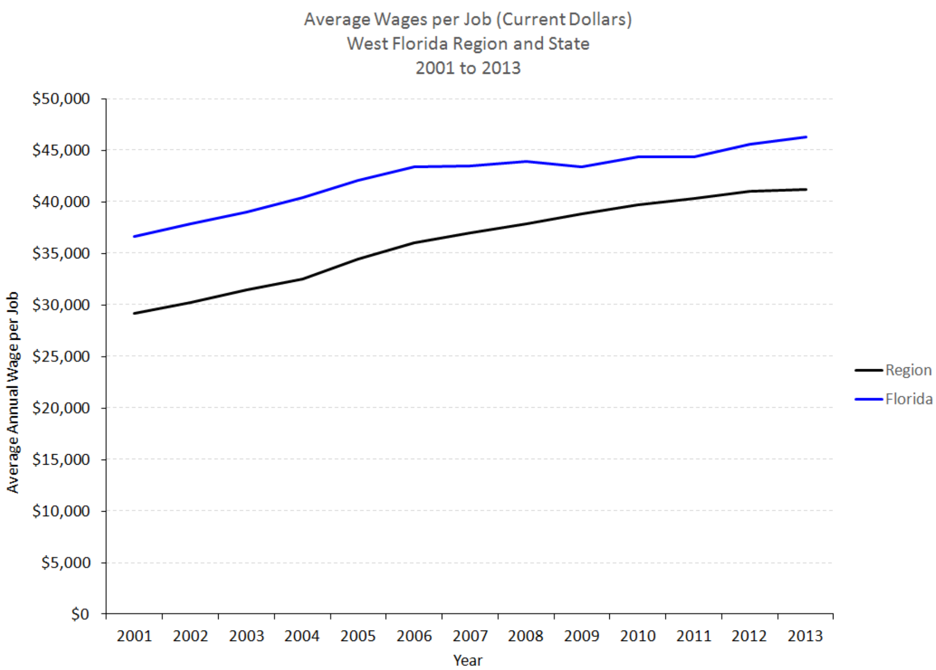
Area	Year												
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bay	$28,253	$29,674	$31,190	$32,044	$33,927	$35,443	$36,092	$36,649	$37,243	$38,580	$38,617	$38,413	$38,612
Escambia	$30,175	$30,838	$31,851	$33,129	$34,784	$36,323	$37,468	$38,599	$39,902	$40,508	$41,602	$42,339	$42,199
Holmes	$22,606	$23,081	$23,685	$24,844	$25,602	$26,342	$27,423	$27,698	$28,201	$28,119	$28,195	$28,806	$28,995
Okaloosa	$30,237	$32,329	$33,696	$34,482	$36,589	$38,220	$39,822	$40,858	$42,199	$43,396	$44,064	$45,605	$46,136
Santa Rosa	$27,181	$26,991	$28,396	$29,792	$32,145	$35,223	$34,627	$35,037	$35,547	$35,830	$36,304	$36,944	$36,782
Walton	$24,584	$25,557	$26,754	$27,956	$30,519	$31,490	$32,330	$32,144	$31,991	$32,412	$32,742	$33,836	$34,333
Washington	$24,901	$25,204	$25,945	$26,402	$28,313	$28,581	$30,442	$30,867	$32,550	$32,417	$32,329	$32,770	$33,757
Region	$29,188	$30,285	$31,514	$32,559	$34,430	$36,042	$37,027	$37,867	$38,880	$39,717	$40,340	$41,089	$41,243
Florida	$36,654	$37,883	$38,991	$40,427	$42,078	$43,444	$43,520	$43,963	$43,431	$44,407	$44,396	$45,577	$46,326

Source: U.S. Bureau of Economic Analysis

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 dollar estimates are in current dollars (not adjusted for inflation).

Illustration A-1

Average Wages per Job
West Florida Region and State
2001 to 2013



b. High School Graduation Rates

As shown in Table A-2 below, the graduation rates for each of the seven counties moved in the right direction by almost 7%, remaining ahead of the State Average the entirety of the decade. What is notable is Okaloosa Counties' improvement past Santa Rosa County with the highest graduation rate at 90.7% and Escambia County's improvement of 14.1% since 2001.

Table A-2

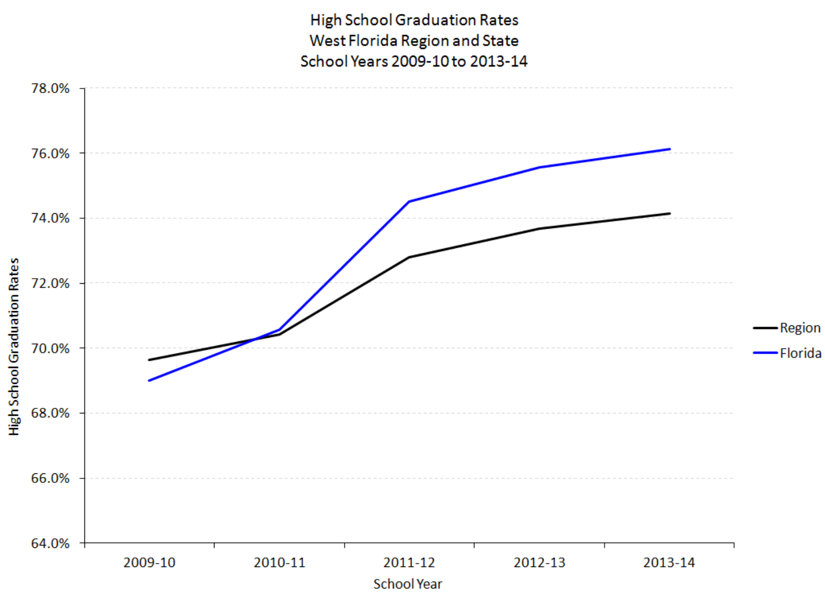
High School Graduation Rates
West Florida Region and State
School Years 2009-10 to 2013-14

Area	School Year				
	2009-10	2010-11	2011-12	2012-13	2013-14
Bay	69.2%	68.1%	73.7%	73.0%	70.8%
Escambia	55.4%	57.7%	62.1%	64.2%	66.1%
Holmes	77.8%	75.1%	72.8%	78.1%	71.6%
Okaloosa	86.2%	84.5%	83.3%	82.7%	82.5%
Santa Rosa	74.7%	77.8%	77.2%	78.9%	82.8%
Walton	74.2%	74.2%	74.5%	77.6%	68.4%
Washington	74.8%	68.7%	71.1%	71.0%	66.2%
Region	69.6%	70.4%	72.8%	73.7%	74.1%
Florida	69.0%	70.6%	74.5%	75.6%	76.1%

Source: Florida Department of Education, PK-12 Public School Data Publications and Reports, http://www.fldoe.org/accountability/data-sys/edu-info-accountability-services/pk-12-public-school-data-pubs-reports/students.stml

Illustration A-2

High School Graduation Rates
West Florida Region and State
School Years 2009-10 to 2013-14



c. 8th Grade Math Performance

As shown in Table A-3 below, the 8th Grade Math performance decreased over the past four years, but has increased to almost 10% better than the state percentage.

Table A-3

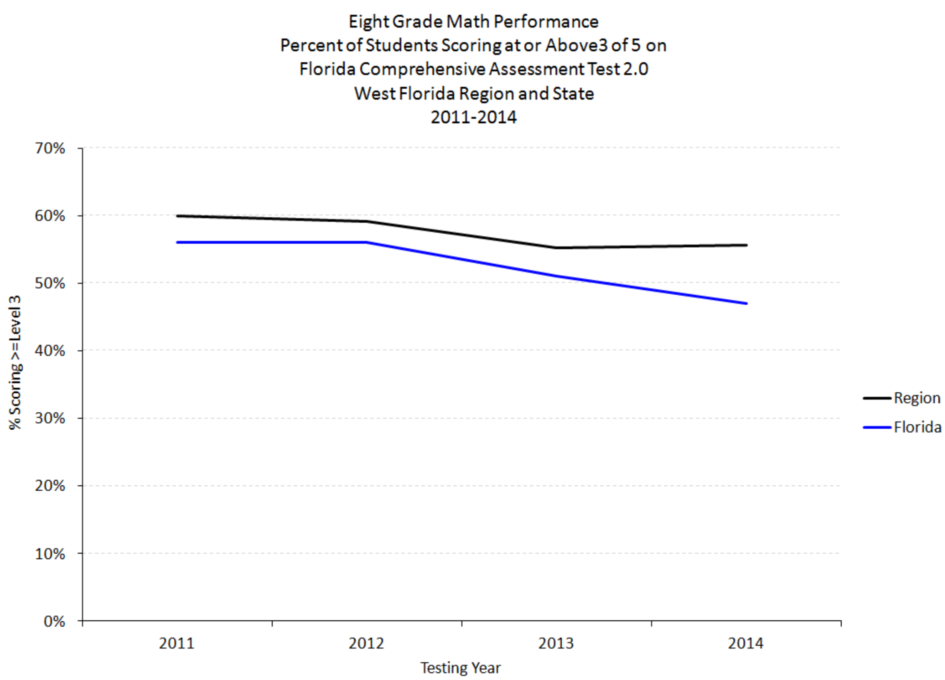
Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
West Florida Region and State
2011 to 2014

	Year			
Area	**2011**	**2012**	**2013**	**2014**
Bay	58%	58%	47%	39%
Escambia	46%	45%	44%	46%
Holmes	58%	51%	54%	59%
Okaloosa	73%	71%	69%	67%
Santa Rosa	68%	67%	66%	70%
Walton	66%	66%	50%	56%
Washington	55%	61%	42%	35%
Region	60%	59%	55%	56%
Florida	56%	56%	51%	47%

Source: Florida Department of Education, Florida Comprehensive Assessment Test 2.0, https://app1.fldoe.org/FCATDemographics/Default.aspx

Illustration A-3

**Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
West Florida Region and State
2011 to 2014**



2. Innovation & Economic Development

a. Gross Domestic Product

As shown in Table A-4 below, there is neither growth nor attrition in the Region's' GDP to note. This part of Florida is painfully behind other areas of the State.

Table A-4

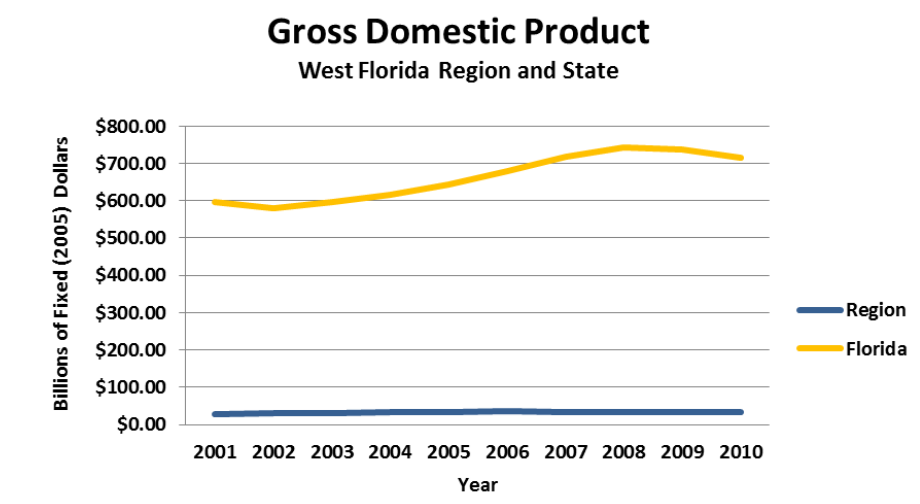
Gross Domestic Product
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bay	$5.22	$5.44	$5.74	$6.08	$6.49	$6.65	$6.58	$6.60	$6.50	$6.74
Escambia	$11.24	$11.18	$11.31	$11.82	$11.87	$12.26	$12.23	$11.95	$11.85	$12.28
Holmes	$0.19	$0.18	$0.19	$0.22	$0.24	$0.25	$0.25	$0.24	$0.23	$0.24
Okaloosa	$8.14	$8.99	$9.50	$10.08	$9.91	$10.04	$9.68	$9.43	$9.27	$9.71
Santa Rosa	$2.01	$2.09	$2.24	$2.43	$2.62	$2.84	$2.74	$2.56	$2.58	$2.67
Walton	$0.98	$1.05	$1.26	$1.46	$2.14	$2.29	$2.16	$1.94	$1.85	$1.89
Washington	$0.33	$0.31	$0.31	$0.34	$0.37	$0.38	$0.39	$0.38	$0.39	$0.39
Region	$28.10	$29.23	$30.55	$32.44	$33.64	$34.70	$34.02	$33.10	$32.67	$33.92
Florida	$596.72	$579.57	$596.72	$616.75	$644.25	$680.00	$717.59	$742.52	$737.83	$716.05

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

Illustration A-4

Gross Domestic Product
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



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

b. Tourism Development Tax Collections

As shown in Table A-5 below, it is apparent that this region of Florida is far behind in collection of Tourist Development Tax Collection, painfully so in some of the Counties.

Table A-5

Tourism Development Tax Collections
West Florida Region and State
Thousands of Dollars
2000-01 to 2009-10

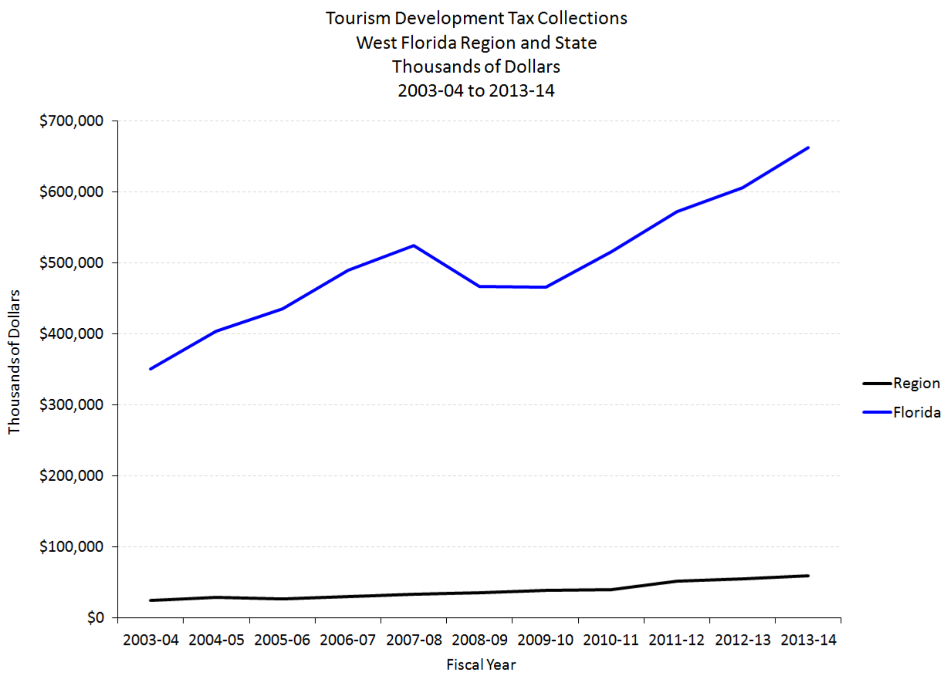
Area	Fiscal Year										
	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Bay	$4,459	$6,245	$5,520	$6,177	$6,618	$8,583	$11,605	$11,859	$14,653	$15,637	$16,663
Escambia	$5,077	$5,132	$4,524	$4,760	$5,449	$5,302	$5,457	$5,589	$6,814	$7,454	$8,011
Holmes	$0	$3	$11	$8	$9	$10	$11	$22	$15	$15	$27
Okaloosa	$7,775	$7,972	$7,365	$8,236	$9,797	$10,340	$10,039	$9,502	$12,933	$13,182	$13,990
Santa Rosa	$265	$406	$432	$815	$899	$893	$878	$882	$1,134	$1,227	$1,512
Walton	$7,587	$9,022	$8,744	$10,256	$10,985	$10,560	$11,165	$11,855	$15,880	$17,634	$19,101
Washington	$35	$59	$57	$92	$91	$84	$78	$77	$63	$70	$71
Region	$25,198	$28,840	$26,652	$30,344	$33,848	$35,772	$39,235	$39,786	$51,493	$55,219	$59,377
Florida	$350,471	$404,583	$435,183	$489,629	$524,408	$467,089	$466,221	$515,845	$572,655	$605,895	$662,826

Note: Values are presented in thousands of dollars.

Source: Florida Department of Revenue, Local Government Tax Receipts by County, http://dor.myflorida.com/taxes/Pages/colls_to_7_2003.aspx

Illustration A-5

**Tourism Development Tax Collections
West Florida Region and State
Thousands of Dollars
2003-04 to 2013-14**



c. Trade Exports and Imports

As shown in Table A-6a and Table A-6b below, the region's Trade Exports and Imports are very low and show very little change over the last ten years.

Table A-6a

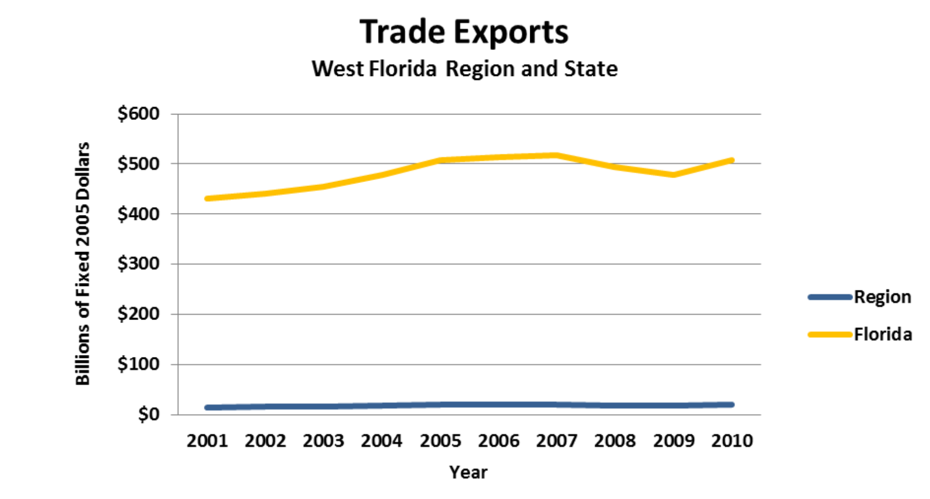
Trade Exports
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bay	$3.30	$3.26	$3.49	$3.68	$3.90	$3.97	$4.06	$4.22	$4.13	$4.36
Escambia	$5.84	$5.93	$6.23	$6.77	$7.00	$7.03	$7.05	$6.61	$6.32	$6.64
Holmes	$0.14	$0.14	$0.15	$0.20	$0.22	$0.22	$0.22	$0.21	$0.21	$0.22
Okaloosa	$3.66	$4.20	$4.74	$5.21	$5.16	$5.14	$4.80	$4.59	$4.52	$4.87
Santa Rosa	$1.29	$1.28	$1.36	$1.46	$1.64	$1.78	$1.68	$1.53	$1.60	$1.66
Walton	$0.90	$0.95	$1.14	$1.30	$1.98	$2.09	$1.94	$1.71	$1.63	$1.68
Washington	$0.28	$0.23	$0.23	$0.27	$0.33	$0.30	$0.31	$0.29	$0.29	$0.30
Region	$15.41	$15.99	$17.34	$18.88	$20.22	$20.53	$20.05	$19.16	$18.70	$19.72
Florida	$431.06	$440.19	$454.90	$477.68	$507.90	$513.80	$517.27	$494.13	$478.74	$507.02

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

Illustration A-6a

Trade Exports
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



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

Table A-6b

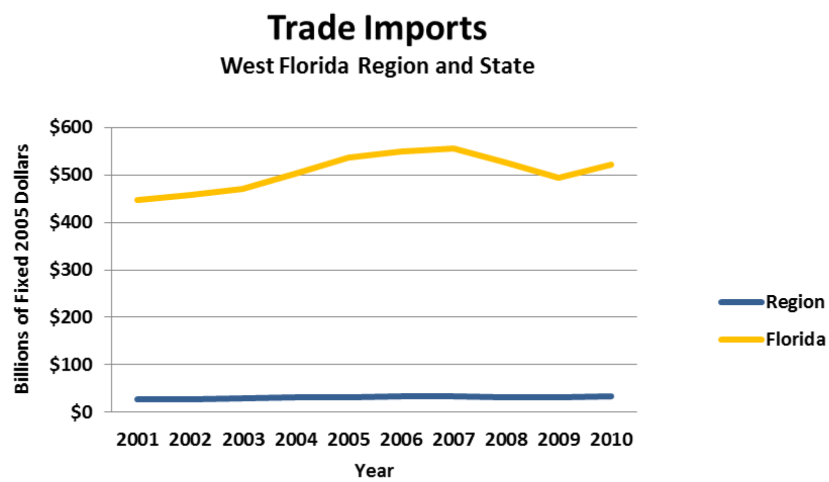
Trade Imports
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bay	$4.67	$4.86	$5.14	$5.53	$5.85	$5.98	$6.00	$5.77	$5.47	$5.80
Escambia	$9.26	$9.36	$9.46	$9.84	$10.08	$10.38	$10.62	$10.50	$10.22	$10.74
Holmes	$0.45	$0.44	$0.47	$0.52	$0.55	$0.55	$0.57	$0.54	$0.52	$0.54
Okaloosa	$7.05	$7.74	$8.17	$8.72	$9.06	$9.19	$9.27	$9.10	$8.68	$9.21
Santa Rosa	$3.46	$3.56	$3.79	$4.13	$4.37	$4.56	$4.56	$4.37	$4.27	$4.47
Walton	$1.19	$1.25	$1.40	$1.57	$1.82	$1.92	$1.92	$1.79	$1.66	$1.75
Washington	$0.58	$0.55	$0.57	$0.62	$0.67	$0.66	$0.66	$0.62	$0.60	$0.63
Region	$26.65	$27.76	$29.01	$30.93	$32.38	$33.24	$33.60	$32.69	$31.41	$33.14
Florida	$447.40	$458.37	$470.73	$503.30	$537.11	$550.05	$555.19	$526.57	$493.46	$520.94

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

Illustration A-6b

Trade Imports
West Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



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

3. Infrastructure & Growth Leadership

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

The population of the region is set to increase by a projected 200 thousand more residents. A majority of that growth is set to occur in Bay, Santa Rosa, and Walton Counties. Conversely, very little growth is expected in Holmes County, which is also on the eastern end of the region and quite proximate to both counties expecting large growth numbers.

Table A-7

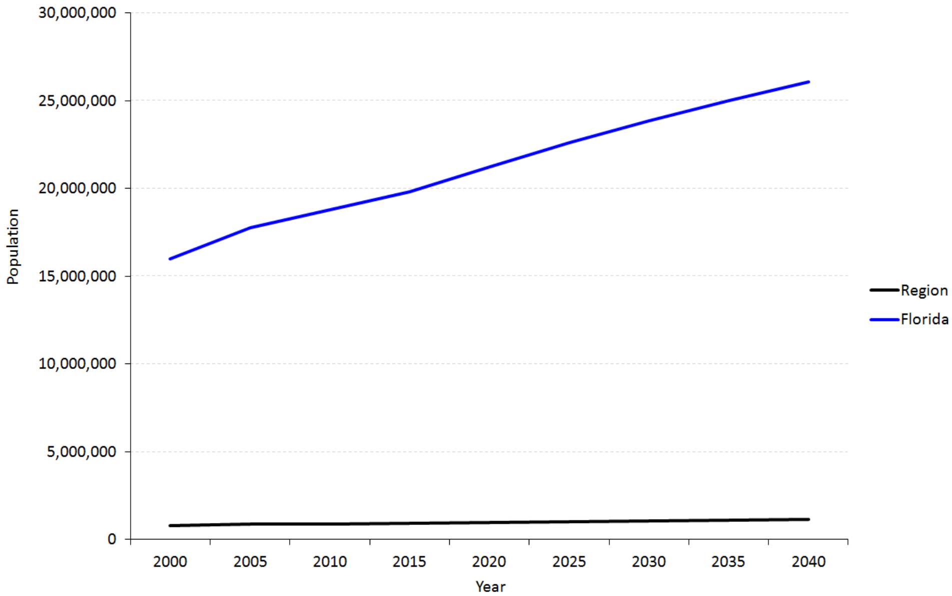
Population Counts, Estimates and Projections
West Florida Region and State
2000 to 2040

	Census	Estimate	Census	Projections					
Area	**2000**	**2005**	**2010**	**2015**	**2020**	**2025**	**2030**	**2035**	**2040**
Bay	148,217	159,482	168,852	172,509	181,247	189,349	197,265	205,001	211,787
Escambia	294,410	296,785	297,619	305,872	310,465	314,717	318,550	321,950	324,947
Holmes	18,564	19,435	19,927	20,074	20,516	20,881	21,188	21,433	21,626
Okaloosa	170,498	183,192	180,822	192,336	200,631	207,716	213,951	219,532	225,363
Santa Rosa	117,743	139,772	151,372	163,306	178,297	192,323	205,334	217,421	229,257
Walton	40,601	49,681	55,043	61,324	69,414	77,330	85,021	92,308	98,591
Washington	20,973	22,659	24,896	25,228	26,237	27,165	28,038	28,858	29,590
Region	811,006	871,006	898,531	940,649	986,807	1,029,481	1,069,347	1,106,503	1,141,161
Florida	15,982,824	17,778,156	18,801,332	19,789,625	21,236,667	22,600,346	23,872,566	25,027,345	26,081,392

Source: Florida Legislature Office of Economic and Demographic Research (EDR), based on the results from the Florida Demographic Estimating Conference, February 2015 and UF, BEBR, Florida Population Studies, Bulletin 171, April 2015 medium county projections.

Illustration A-7

Population Counts, Estimates and Projections
West Florida Region and State
2000 to 2040



b. Annual Building Permits

According to Table A-8 below, the building permits for the entire State and Region have dropped off drastically after 2005. This economic downturn, known popularly as the Great Recession, is still having effects on the building industry today, but permitting has been steadily increasing in the region since 2012. A slight bump into the positive direction has been shown in 2010.

Table A-8

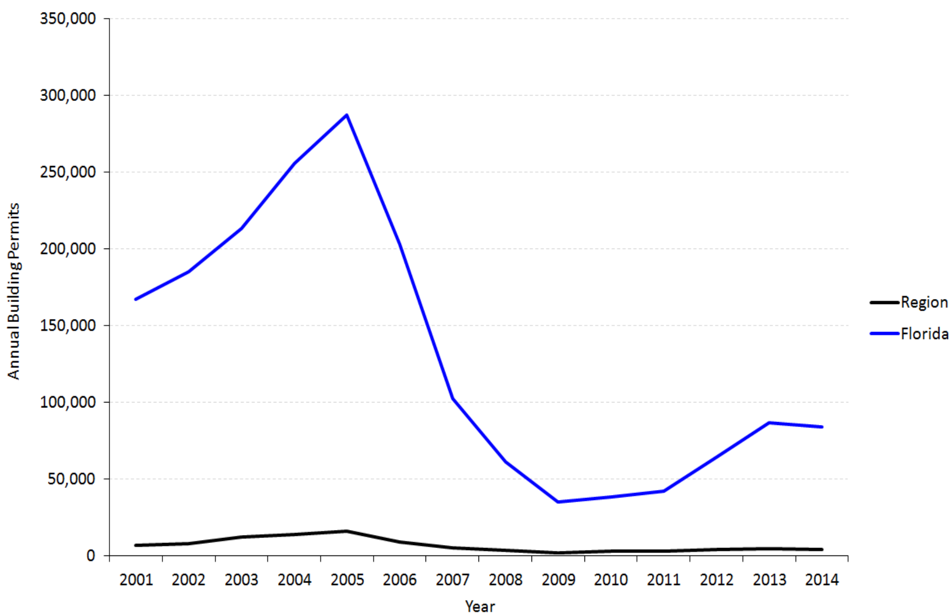
Annual Building Permits
West Florida Region and State
Residential Units
2001 to 2014

Area	Year													
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bay	1,071	1,616	3,676	3,844	5,538	3,076	1,036	918	352	309	343	440	592	601
Escambia	1,475	2,067	2,942	2,613	2,602	1,884	1,757	742	594	973	638	655	830	698
Holmes	51	54	69	49	54	97	90	51	23	16	19	20	24	31
Okaloosa	1,439	1,936	1,749	2,711	3,720	1,790	773	1,093	410	547	749	922	1,045	590
Santa Rosa	1,707	1,146	1,859	2,022	1,354	927	865	548	448	781	567	839	1,301	1,127
Walton	1,165	1,279	1,824	2,592	2,719	1,277	829	423	231	388	552	1,111	1,187	1,076
Washington	93	76	114	126	24	125	112	63	38	23	23	22	25	21
Region	7,001	8,174	12,233	13,957	16,011	9,176	5,462	3,838	2,096	3,037	2,891	4,009	5,004	4,144
Florida	167,035	185,431	213,567	255,893	287,250	203,238	102,551	61,042	35,329	38,679	42,360	64,810	86,752	84,075

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

Illustration A-8

Annual Building Permits
West Florida Region and State
Residential Units
2001 to 2014



c. Vehicle Miles Traveled

As shown in Table A-9 below, Escambia County has a high VMT number compared to the rest here in the Region. This is most likely due to the face that the north part of the Escambia County residents drive south to the jobs in Pensacola at the south end of the County.

Table A-9

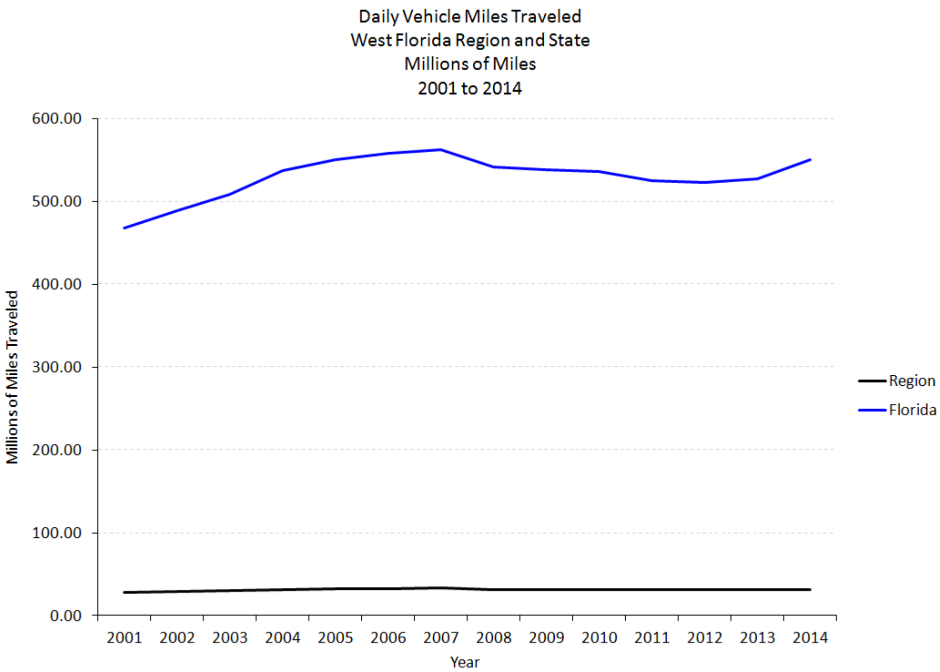
Daily Vehicle Miles Traveled
West Florida Region and State
Millions of Miles
2001 to 2014

Area	Year													
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bay	4.36	4.49	4.80	5.01	5.20	5.22	5.33	5.01	5.01	5.03	4.91	4.94	5.00	5.07
Escambia	8.68	9.03	9.41	9.46	9.65	9.65	10.08	9.46	9.28	9.29	9.23	9.26	9.24	9.37
Holmes	1.01	1.05	1.05	1.10	1.15	1.15	1.18	1.13	1.09	1.10	1.08	1.11	1.07	1.10
Okaloosa	5.15	5.41	5.47	5.95	6.09	6.18	6.15	5.73	5.57	5.66	5.60	5.63	5.78	5.80
Santa Rosa	4.28	4.41	4.54	5.61	5.62	5.68	5.62	5.34	5.45	5.58	5.35	5.54	5.51	5.56
Walton	2.67	2.85	2.85	3.14	3.23	3.24	3.30	3.19	3.11	3.16	3.11	3.18	3.21	3.38
Washington	1.49	1.54	1.59	1.58	1.64	1.66	1.68	1.59	1.55	1.56	1.57	1.56	1.53	1.57
Region	27.63	28.77	29.72	31.86	32.56	32.78	33.34	31.45	31.06	31.39	30.85	31.23	31.35	31.85
Florida	468.57	489.54	508.61	537.49	550.61	558.31	562.80	542.33	538.09	536.32	525.63	522.88	527.95	550.80

Source: Florida Department of Transportation, Florida Highway Mileage Reports - Public Roads, http://www.dot.state.fl.us/planning/statistics/mileage-rpts/public.shtm

Illustration A-9

**Daily Vehicle Miles Traveled
West Florida Region and State
Millions of Miles
2001 to 2014**



4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

As shown in Table A-10 below, the region's unemployment rate is just below the state. The region's unemployment has been reduced significantly since 2010.

Table A-10

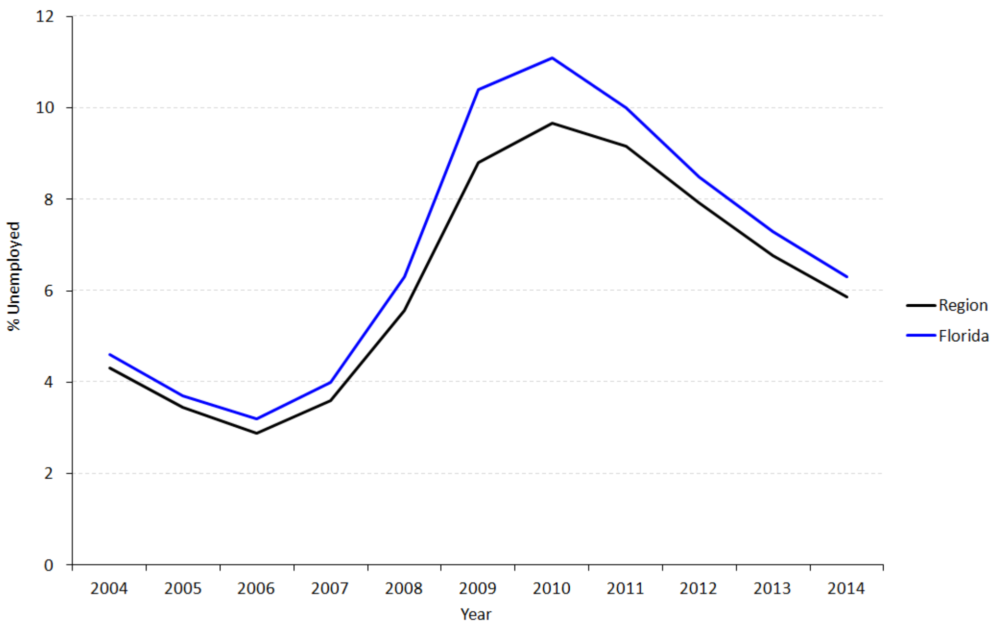
Average Annual Unemployment Rates
West Florida Region and State
2004 to 2014

Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bay	4.5	3.6	3.1	3.7	5.7	9.1	10.5	10.2	8.6	7.3	6.3
Escambia	4.9	3.9	3.2	4.0	6.2	9.9	10.1	9.7	8.5	7.3	6.3
Holmes	4.6	3.6	3.0	3.6	5.2	8.0	10.4	9.7	8.7	7.6	6.8
Okaloosa	3.4	2.8	2.4	3.1	4.7	7.2	8.4	7.8	6.7	5.7	5.1
Santa Rosa	4.5	3.6	3.0	3.7	5.8	9.1	9.3	8.6	7.6	6.5	5.4
Walton	3.6	2.8	2.2	2.8	4.6	7.6	9.4	8.5	7.2	6.0	5.3
Washington	4.7	3.7	3.3	4.1	6.5	10.1	10.6	10.0	8.9	7.8	6.7
Region	4.3	3.5	2.9	3.6	5.6	8.8	9.7	9.2	7.9	6.8	5.9
Florida	4.6	3.7	3.2	4.0	6.3	10.4	11.1	10.0	8.5	7.3	6.3

Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics, Local Area Unemployment Statistics program in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

Illustration A-10

Average Annual Unemployment Rates
West Florida Region and State
2001 to 2014



b. Employment by Industry

As shown in Table A-11a below, there are heavy investments in the region for jobs in the Retail Trade, Health Care and Social Assistance, Local Government, and Federal Military. There is very little investment in the region in the primary industries. According to Table A-11b below, there is much less investment in the public sector compared to the private sector.

Table A-11a

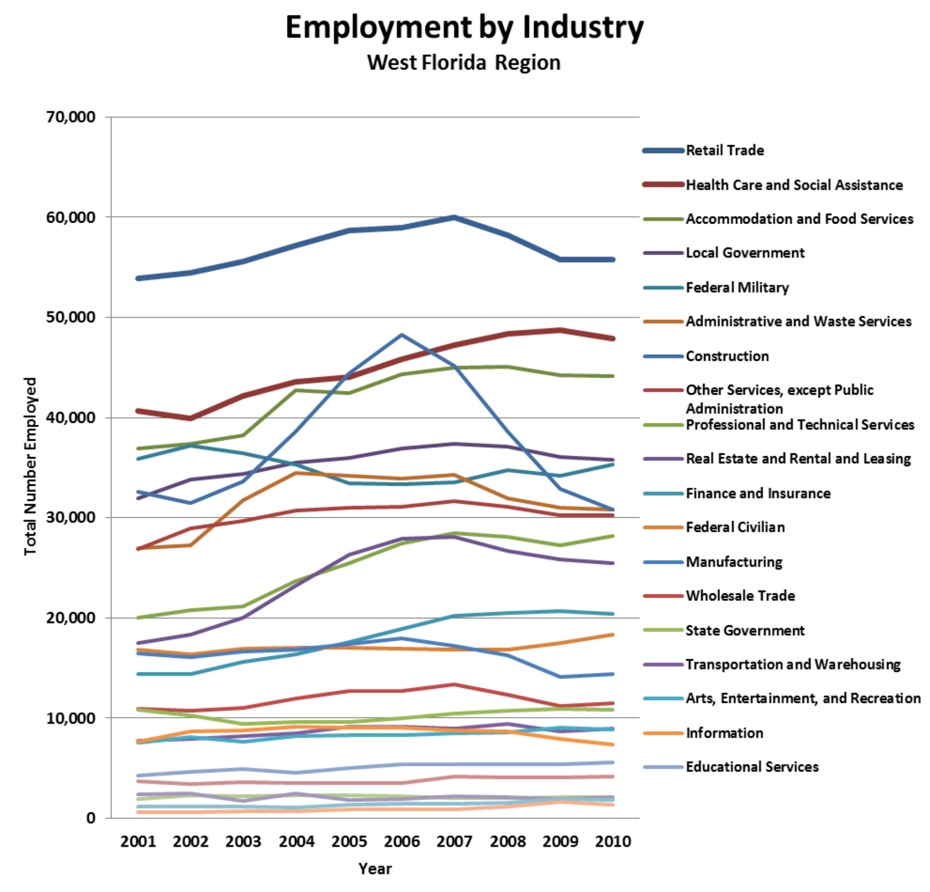
Employment by Industry
West Florida Region
2001 to 2010

Industry	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Retail Trade	53,841	54,464	55,583	57,194	58,681	58,983	59,974	58,222	55,731	55,809
Health Care and Social Assistance	40,651	39,887	42,130	43,544	44,068	45,865	47,214	48,365	48,691	47,908
Accommodation and Food Services	36,867	37,417	38,177	42,739	42,461	44,365	45,012	45,104	44,186	44,139
Local Government	31,968	33,787	34,357	35,537	35,984	36,911	37,418	37,060	36,063	35,795
Federal Military	35,831	37,161	36,406	35,288	33,418	33,301	33,561	34,757	34,184	35,333
Administrative and Waste Services	27,000	27,245	31,742	34,507	34,162	33,951	34,268	31,973	30,993	30,831
Construction	32,588	31,449	33,667	38,606	44,413	48,286	45,203	38,592	32,884	30,783
Other Services, except Public Administration	26,890	28,899	29,689	30,712	31,036	31,089	31,701	31,117	30,278	30,205
Professional and Technical Services	20,002	20,792	21,160	23,641	25,467	27,398	28,470	28,066	27,286	28,149
Real Estate and Rental and Leasing	17,517	18,337	19,986	23,214	26,281	27,933	28,106	26,723	25,810	25,468
Finance and Insurance	14,352	14,425	15,590	16,389	17,556	18,900	20,229	20,524	20,706	20,368
Federal Civilian	16,843	16,395	16,958	16,987	17,015	16,967	16,794	16,881	17,488	18,323
Manufacturing	16,488	16,130	16,690	16,867	17,412	17,953	17,165	16,280	14,133	14,424
Wholesale Trade	10,913	10,732	11,065	11,946	12,719	12,700	13,370	12,307	11,252	11,520
State Government	10,802	10,317	9,397	9,623	9,644	10,000	10,415	10,699	10,904	10,801
Transportation and Warehousing	7,727	7,949	8,189	8,495	9,110	9,163	8,993	9,444	8,719	8,910
Arts, Entertainment, and Recreation	7,569	8,144	7,612	8,206	8,314	8,293	8,469	8,542	9,039	8,863
Information	7,598	8,713	8,746	9,172	9,022	9,055	8,810	8,719	7,950	7,409
Educational Services	4,300	4,605	4,958	4,592	5,062	5,382	5,360	5,351	5,381	5,556
Farm	3,731	3,454	3,568	3,525	3,548	3,518	4,137	4,074	4,051	4,138
Management of Companies and Enterprises	1,942	2,259	2,202	2,335	2,300	2,217	2,043	2,013	2,087	2,123
Forestry, Fishing, Related Activities, and Other	2,380	2,523	1,699	2,453	1,875	1,932	2,199	2,118	1,954	2,074
Utilities	1,207	1,152	1,135	1,065	1,356	1,431	1,449	1,536	1,893	1,847
Mining	587	563	711	707	849	873	889	1,204	1,658	1,351

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

Illustration A-11a

Employment by Industry
West Florida Region
2001 to 2010



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

Table A-11b

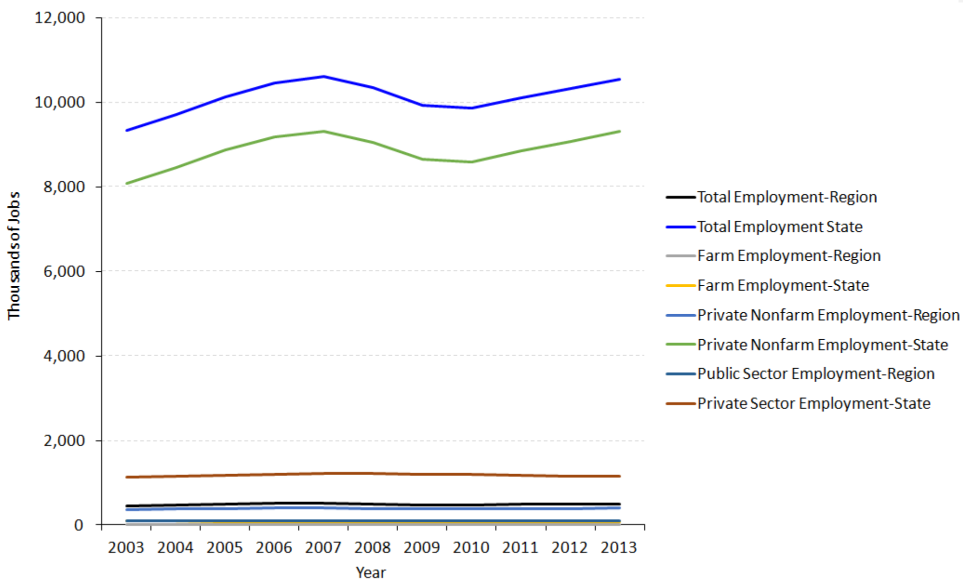
Employment by Sector
West Florida Region and State
2003 to 2013

Sector	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total Employment-Region	454	480	495	510	514	497	482	479	486	491	499
Total Employment State	9,331	9,714	10,140	10,471	10,626	10,358	9,938	9,878	10,117	10,332	10,556
Farm Employment-Region	4	4	4	4	4	4	4	4	4	4	4
Farm Employment-State	95	88	80	81	87	84	80	82	84	87	84
Private Nonfarm Employment-Region	353	379	395	409	411	393	379	376	384	388	397
Private Nonfarm Employment-State	8,094	8,465	8,882	9,194	9,325	9,053	8,653	8,592	8,853	9,080	9,310
Public Sector Employment-Region	97	97	96	97	98	99	99	99	98	98	99
Private Sector Employment-State	1,141	1,161	1,178	1,196	1,215	1,220	1,205	1,203	1,181	1,165	1,163

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Illustration A-11b

**Employment by Sector
West Florida Region and State
2003 to 2013**



c. Wages by Industry

As shown in Table A-12a below, the region's Wages by Industry seemed to have all grown in a healthy amount in the last decade. This is most evident in the Federal Civilian wage, which climbed from $44,200/year in 2001 to $64,900/year in 2010. What is also notable is the highest salaries come from jobs in the public sector. This is shown in Table A-12b below.

Table A-12a

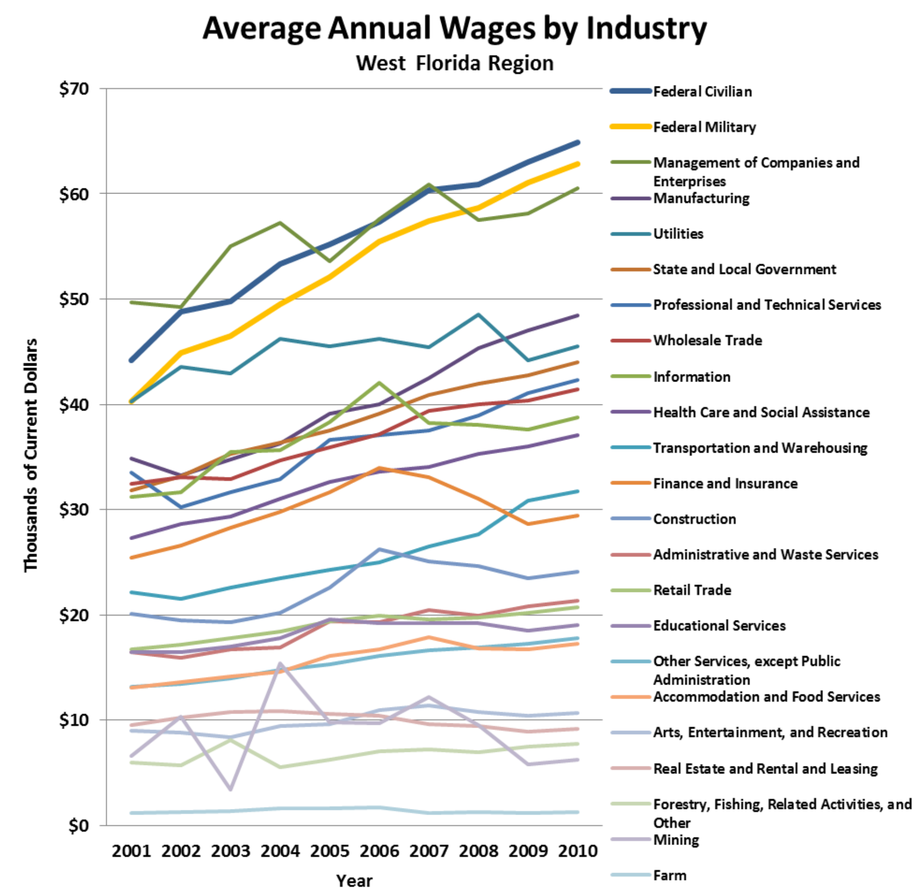
Average Annual Wages by Industry
West Florida Region
Thousands of Current Dollars
2001 to 2010

	Year									
Industry	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**
Federal Civilian	$44.2	$48.8	$49.8	$53.4	$55.2	$57.3	$60.3	$60.9	$63.0	$64.9
Federal Military	$40.2	$44.9	$46.5	$49.5	$52.1	$55.4	$57.4	$58.7	$61.0	$62.8
Management of Companies and Enterprises	$49.7	$49.2	$55.0	$57.3	$53.6	$57.6	$60.9	$57.5	$58.1	$60.5
Manufacturing	$34.8	$33.2	$34.8	$36.3	$39.1	$40.0	$42.4	$45.3	$47.0	$48.4
Utilities	$40.3	$43.5	$43.0	$46.2	$45.5	$46.2	$45.5	$48.6	$44.2	$45.5
State and Local Government	$31.8	$33.2	$35.3	$36.4	$37.5	$39.1	$40.8	$42.0	$42.7	$44.0
Professional and Technical Services	$33.5	$30.3	$31.6	$32.9	$36.7	$37.1	$37.5	$39.0	$41.1	$42.3
Wholesale Trade	$32.5	$33.1	$32.9	$34.7	$35.9	$37.2	$39.4	$40.0	$40.3	$41.4
Information	$31.2	$31.6	$35.5	$35.6	$38.3	$42.1	$38.2	$38.0	$37.6	$38.8
Health Care and Social Assistance	$27.3	$28.6	$29.4	$31.1	$32.6	$33.6	$34.1	$35.3	$36.0	$37.1
Transportation and Warehousing	$22.1	$21.5	$22.6	$23.5	$24.3	$25.0	$26.5	$27.6	$30.9	$31.7
Finance and Insurance	$25.4	$26.6	$28.3	$29.8	$31.7	$33.9	$33.1	$31.1	$28.6	$29.4
Construction	$20.1	$19.5	$19.3	$20.2	$22.6	$26.2	$25.1	$24.6	$23.5	$24.1
Administrative and Waste Services	$16.4	$15.9	$16.7	$16.9	$19.4	$19.3	$20.4	$19.9	$20.8	$21.4
Retail Trade	$16.7	$17.2	$17.8	$18.5	$19.4	$19.9	$19.6	$19.8	$20.2	$20.7
Educational Services	$16.4	$16.5	$17.0	$17.8	$19.6	$19.2	$19.2	$19.2	$18.5	$19.0
Other Services, except Public Administration	$13.1	$13.5	$13.9	$14.7	$15.3	$16.1	$16.6	$16.9	$17.3	$17.8
Accommodation and Food Services	$13.1	$13.6	$14.1	$14.6	$16.1	$16.7	$17.9	$16.8	$16.7	$17.2
Arts, Entertainment, and Recreation	$9.0	$8.8	$8.4	$9.4	$9.7	$11.0	$11.4	$10.7	$10.4	$10.7
Real Estate and Rental and Leasing	$9.5	$10.2	$10.8	$10.9	$10.6	$10.4	$9.6	$9.5	$8.9	$9.2
Forestry, Fishing, Related Activities, and Other	$6.0	$5.7	$8.1	$5.5	$6.3	$7.1	$7.2	$6.9	$7.5	$7.8
Mining	$6.6	$10.3	$3.4	$15.4	$9.8	$9.7	$12.2	$9.5	$5.8	$6.2
Farm	$1.2	$1.3	$1.3	$1.6	$1.6	$1.7	$1.2	$1.3	$1.2	$1.2

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

Illustration A-12a

Average Annual Wages by Industry
West Florida Region
Thousands of Current Dollars
2001 to 2010



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

Table A-12b

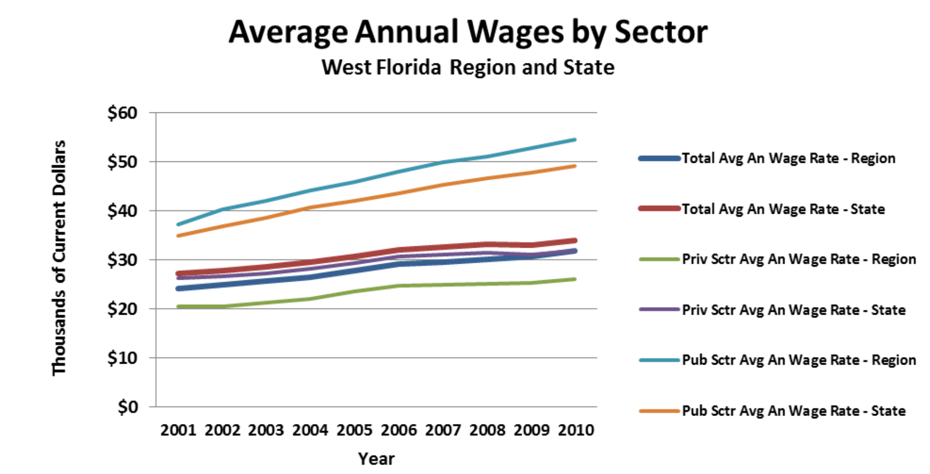
Average Annual Wages by Sector
West Florida Region and State
Thousands of Current Dollars
2001 to 2010

Sector	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Avg An Wage Rate - Region	$24.1	$24.8	$25.6	$26.4	$27.8	$29.0	$29.5	$30.1	$30.7	$31.7
Total Avg An Wage Rate - State	$27.1	$27.7	$28.4	$29.5	$30.7	$32.0	$32.5	$33.0	$32.8	$33.9
Priv Sctr Avg An Wage Rate - Region	$20.5	$20.5	$21.3	$22.0	$23.6	$24.7	$24.9	$25.1	$25.3	$26.1
Priv Sctr Avg An Wage Rate - State	$26.2	$26.6	$27.2	$28.2	$29.4	$30.6	$31.1	$31.4	$30.9	$31.9
Pub Sctr Avg An Wage Rate - Region	$37.2	$40.3	$42.0	$44.1	$45.7	$47.9	$49.8	$51.0	$52.7	$54.4
Pub Sctr Avg An Wage Rate - State	$34.8	$36.7	$38.4	$40.5	$42.0	$43.5	$45.2	$46.6	$47.7	$49.1

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

Illustration A-12b

**Average Annual Wages by Sector
West Florida Region and State
Thousands of Current Dollars
2001 to 2010**



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

5. Civic & Governance Systems

a. Millage Rates

As shown in Table A-13 below, the region's Millage Rates have largely behaved similarly with the State of Florida.

Table A-13

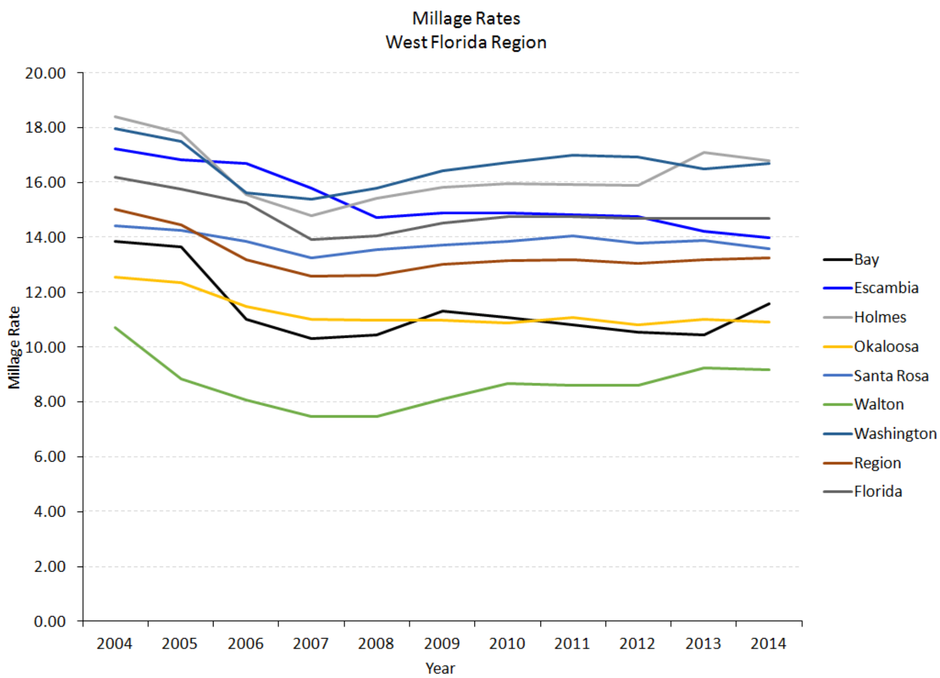
Millage Rates
West Florida Region and State
2004 to 2014

Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bay	13.86	13.65	11.02	10.31	10.46	11.32	11.10	10.81	10.55	10.45	11.58
Escambia	17.22	16.84	16.70	15.78	14.74	14.88	14.88	14.84	14.77	14.21	13.98
Holmes	18.42	17.81	15.57	14.79	15.43	15.83	15.98	15.93	15.89	17.10	16.79
Okaloosa	12.54	12.36	11.49	11.03	10.97	10.97	10.87	11.10	10.81	11.02	10.91
Santa Rosa	14.42	14.26	13.87	13.26	13.56	13.72	13.87	14.05	13.80	13.88	13.58
Walton	10.72	8.84	8.06	7.46	7.46	8.11	8.67	8.61	8.61	9.26	9.17
Washington	17.97	17.49	15.64	15.40	15.81	16.44	16.75	16.99	16.93	16.50	16.70
Region	15.02	14.46	13.19	12.58	12.63	13.04	13.16	13.19	13.05	13.20	13.24
Florida	16.20	15.75	15.25	13.93	14.05	14.53	14.77	14.75	14.69	14.70	14.71

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

Illustration A-13

Millage Rates
West Florida Region and State
2004 to 2014



b. Registered Nonprofit Organizations

As shown in Table A-14 below, the region's Registered Nonprofit Organizations decreased after 2011, but began picking up again in 2014.

Table A-14

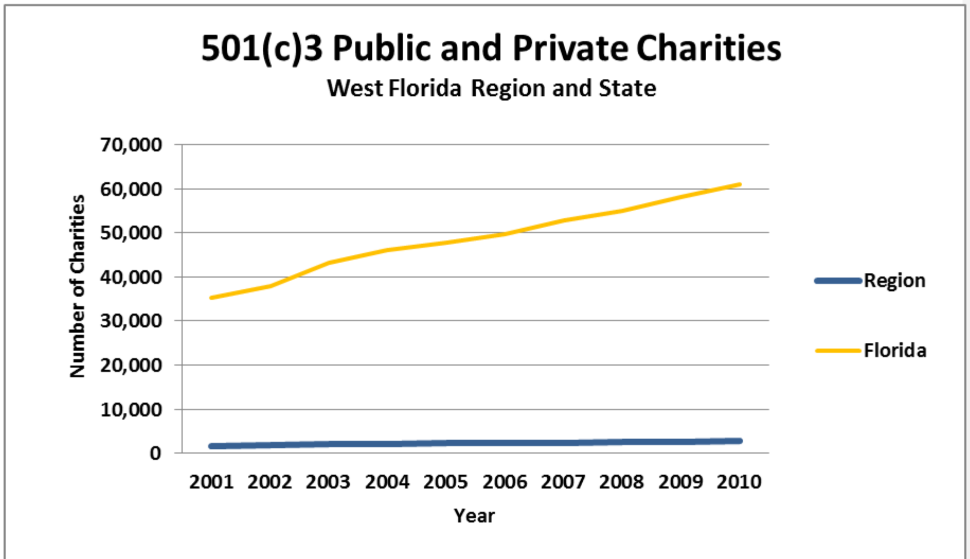
Registered 501(c)3 Organizations
Public and Private Foundation Charities
West Florida Region and State
2004 to 2014

Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Bay	401	412	435	444	468	492	501	458	479	454	490
Escambia	893	921	952	993	1,010	1,026	1,047	950	925	908	983
Holmes	52	55	43	44	49	53	52	54	69	71	72
Okaloosa	436	445	472	485	509	532	556	526	527	519	555
Santa Rosa	238	251	260	280	289	321	338	313	307	300	342
Walton	134	136	156	172	171	184	198	182	176	174	195
Washington	54	52	55	57	65	68	71	70	66	65	67
Region	2,208	2,272	2,373	2,475	2,561	2,676	2,763	2,553	2,549	2,491	2,704
Florida	46,191	47,690	49,817	52,756	55,048	58,209	61,912	57,421	58,015	56,907	62,156

Source: Internal Revenue Service, Exempt Organizations Business Master Filehttp://nccsweb.urban.org/
The Urban Institute, National Center for Charitable Statistics

Illustration A-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
West Florida Region and State
2001 to 2014



Source: The Urban Institute, National Center for Charitable Statistics

c. Voter Participation

As shown in Table A-15 below, this part of Florida is almost perfectly on track with the rest of the state, with large turnouts for presidential races and much lower numbers for the mid-term elections.

Table A-15

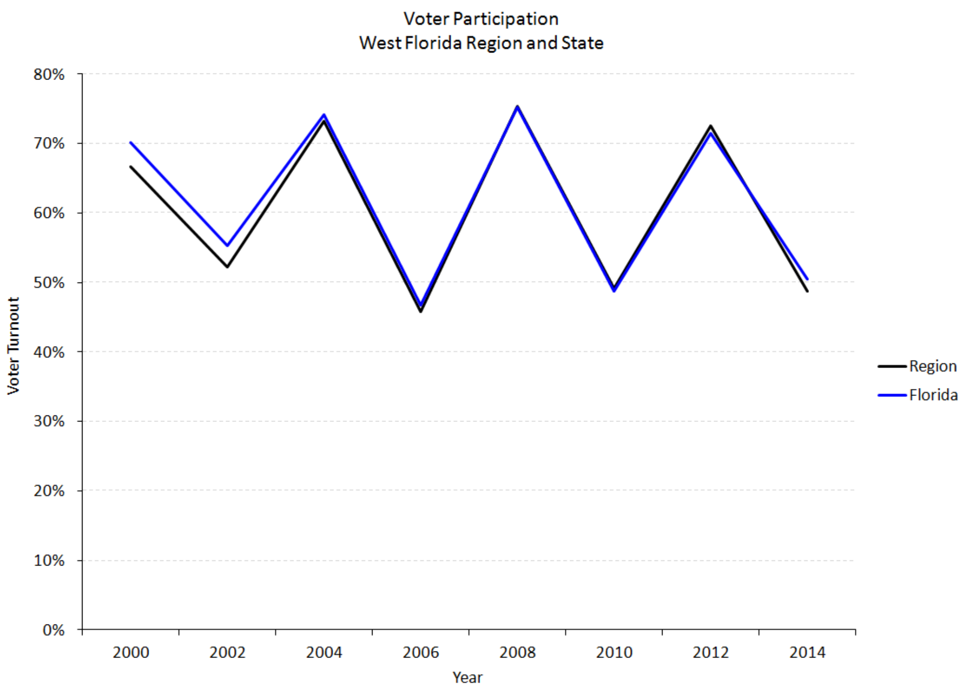
Voter Participation
West Florida Region and State
Biennial General Elections
2000 to 2014

Area	Year							
	2000	2002	2004	2006	2008	2010	2012	2014
Bay	64.2%	49.6%	74.3%	45.0%	73.8%	51.4%	71.2%	51.1%
Escambia	70.8%	53.6%	75.8%	46.9%	79.7%	49.2%	75.5%	49.3%
Holmes	73.1%	57.0%	76.0%	51.9%	75.7%	55.3%	72.4%	52.3%
Okaloosa	64.2%	51.5%	70.6%	45.5%	74.2%	48.4%	73.9%	49.9%
Santa Rosa	65.2%	53.9%	70.0%	43.4%	71.4%	45.1%	66.2%	43.3%
Walton	65.9%	50.5%	73.4%	47.7%	73.9%	52.0%	74.7%	49.3%
Washington	58.2%	50.8%	72.5%	48.7%	70.7%	59.1%	75.8%	57.8%
Region	66.7%	52.2%	73.2%	45.8%	75.3%	49.2%	72.5%	48.8%
Florida	70.1%	55.3%	74.2%	46.8%	75.2%	48.7%	71.5%	50.5%

Source: Florida Department of State, Division of Elections: http://results.elections.myflorida.com/

Illustration A-15

Voter Participation
West Florida Region and State
Biennial General Elections
2000 to 2014



6. Quality of Life & Quality Places

a. Per Capita Income

As shown in Table A-16 below, the region's Per Capita Income has shown some healthy growth, no place more so than in Okaloosa County. While the region is behind the state in every year, the growth and attrition tracked along at a similar rate.

Table A-16

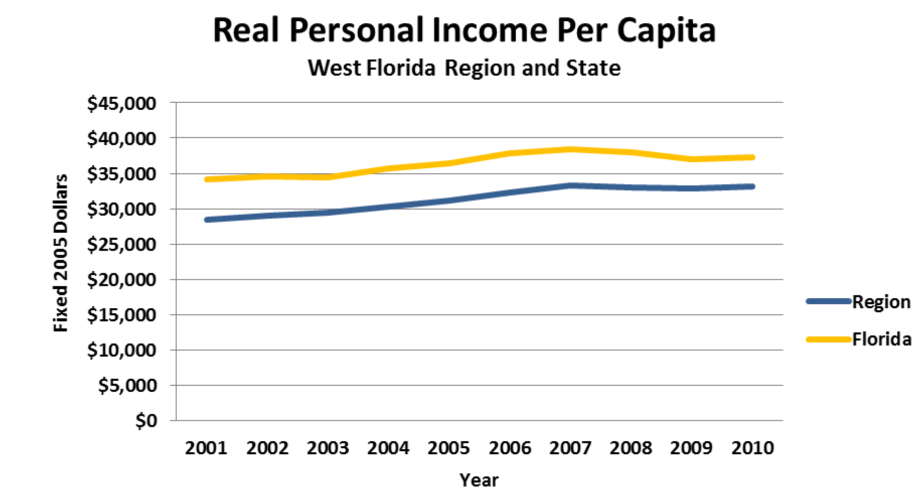
Real Personal Per Capita Income
West Florida Region and State
Fixed 2005 Dollars
2001 to 2010

	Year									
Area	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**
Bay	$28,338	$28,922	$29,499	$30,693	$31,534	$32,329	$33,474	$33,387	$33,355	$33,666
Escambia	$28,053	$28,399	$28,562	$29,381	$29,898	$31,108	$32,175	$31,851	$31,840	$32,241
Holmes	$21,400	$21,587	$21,945	$22,916	$23,371	$24,061	$24,629	$24,602	$24,907	$25,378
Okaloosa	$32,224	$34,033	$34,751	$35,579	$36,532	$38,251	$39,445	$39,476	$39,166	$39,867
Santa Rosa	$28,631	$28,130	$28,188	$29,113	$29,853	$31,277	$31,884	$31,322	$31,382	$31,288
Walton	$22,859	$23,365	$24,121	$25,765	$26,872	$28,121	$28,655	$28,653	$27,568	$27,566
Washington	$20,654	$20,634	$21,023	$21,849	$22,709	$22,964	$23,464	$22,462	$22,793	$22,870
Region	$28,451	$29,023	$29,397	$30,351	$31,085	$32,298	$33,249	$32,975	$32,848	$33,158
Florida	$34,195	$34,509	$34,416	$35,708	$36,408	$37,905	$38,413	$38,016	$37,063	$37,235

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

Illustration A-16

Real Personal Per Capita Income
West Florida Region and State
Fixed 2005 Dollars
2001 to 2010



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

b. House Price Cost Index

As shown in Table A-17 below, the housing bubble, as it popularly became know, has come and gone. Prices are now resting at 1998 levels after the crash in the housing, banking and stock markets.

Table A-17

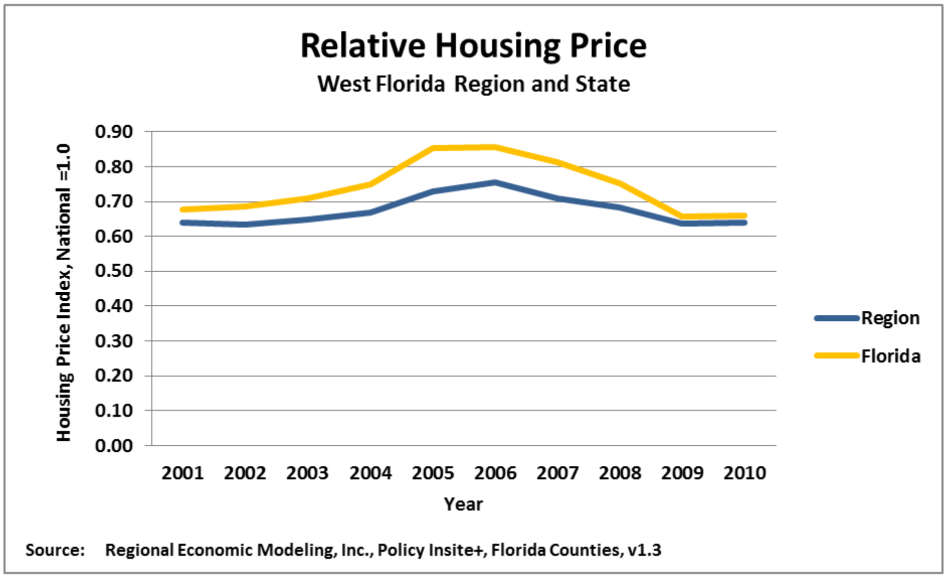
Relative Housing Price
West Florida Region and State
National Index = 1.0
2001 to 2010

	Year									
Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bay	0.60	0.60	0.62	0.64	0.72	0.75	0.69	0.63	0.59	0.59
Escambia	0.62	0.60	0.61	0.61	0.62	0.65	0.64	0.69	0.65	0.65
Holmes	0.67	0.65	0.62	0.62	0.70	0.74	0.70	0.66	0.60	0.60
Okaloosa	0.69	0.70	0.71	0.74	0.84	0.86	0.79	0.73	0.68	0.68
Santa Rosa	0.69	0.69	0.71	0.74	0.83	0.86	0.79	0.72	0.67	0.69
Walton	0.56	0.56	0.57	0.60	0.67	0.69	0.64	0.58	0.54	0.55
Washington	0.46	0.46	0.47	0.50	0.56	0.58	0.53	0.48	0.45	0.45
Region	0.64	0.63	0.65	0.67	0.73	0.76	0.71	0.68	0.64	0.64
Florida	0.68	0.69	0.71	0.75	0.85	0.86	0.81	0.75	0.66	0.66

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

Illustration A-17

Relative Housing Price
West Florida Region and State
National Index = 1.0
2001 to 2010



c. Persons Living in Poverty

As shown in Table A-18 below, the poverty rates for this region and state have increased over the last decade. There was a slight dip in 2011 for the region, but increased again in the following years. Some of the areas high numbers have only increased higher and almost all positive ground gained in the mid 2000s was lost after 2007.

Table A-18

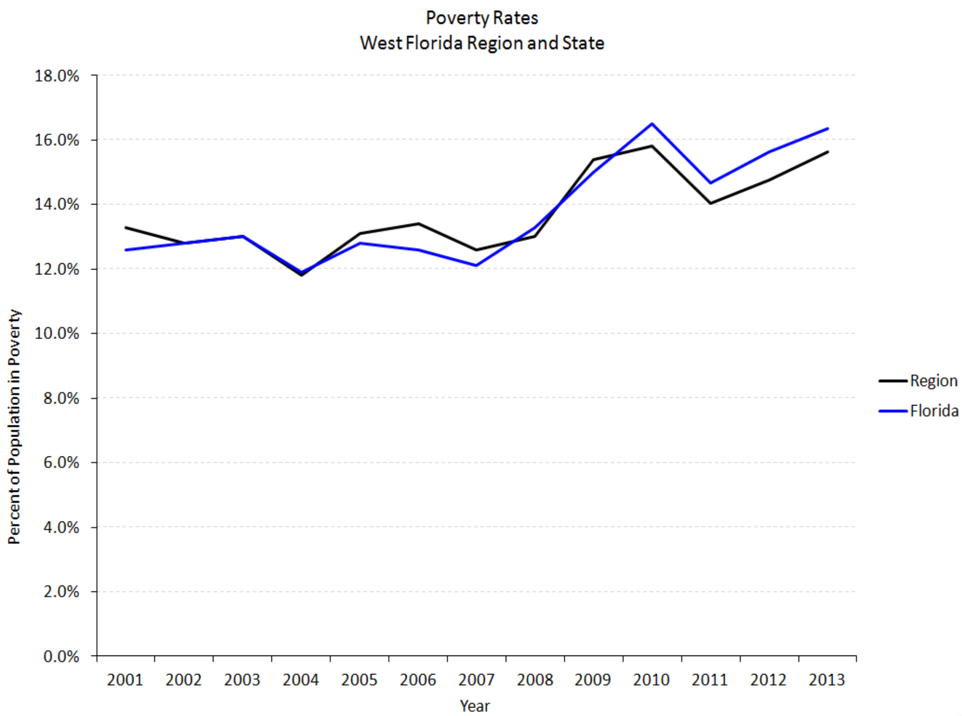
Percent of Persons Living in Poverty
West Florida Region and State
2001 to 2013

Area	Year												
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Bay	12.9%	12.4%	12.8%	11.9%	13.7%	13.8%	12.0%	11.9%	14.4%	15.1%	12.6%	16.2%	18.1%
Escambia	15.8%	15.4%	15.7%	14.2%	15.9%	15.9%	15.0%	16.0%	18.9%	19.1%	18.0%	17.1%	16.8%
Holmes	21.4%	20.5%	18.7%	17.6%	21.9%	20.9%	19.8%	21.0%	24.0%	22.5%	22.0%	22.6%	23.8%
Okaloosa	9.8%	9.4%	9.9%	9.0%	9.8%	9.6%	9.4%	8.7%	12.5%	12.4%	14.9%	13.8%	13.8%
Santa Rosa	10.3%	9.8%	10.0%	9.6%	9.0%	10.8%	10.7%	10.6%	11.4%	12.6%	10.4%	11.9%	14.9%
Walton	15.8%	15.0%	13.5%	11.5%	13.0%	13.3%	11.8%	14.9%	15.8%	16.5%	14.8%	15.8%	18.0%
Washington	19.0%	18.0%	17.2%	15.5%	18.8%	19.3%	18.9%	23.2%	21.0%	21.1%	20.0%	22.1%	22.4%
Region	13.3%	12.8%	13.0%	11.8%	13.1%	13.4%	12.6%	13.0%	15.4%	15.8%	14.0%	14.8%	15.6%
Florida	12.6%	12.8%	13.0%	11.9%	12.8%	12.6%	12.1%	13.3%	15.0%	16.5%	14.7%	15.6%	16.3%

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

Illustration A-18

Percent of Persons Living in Poverty
West Florida Region and State
2001 to 2013



7. Shift-Share Analysis

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

The equation is as follows:

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

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

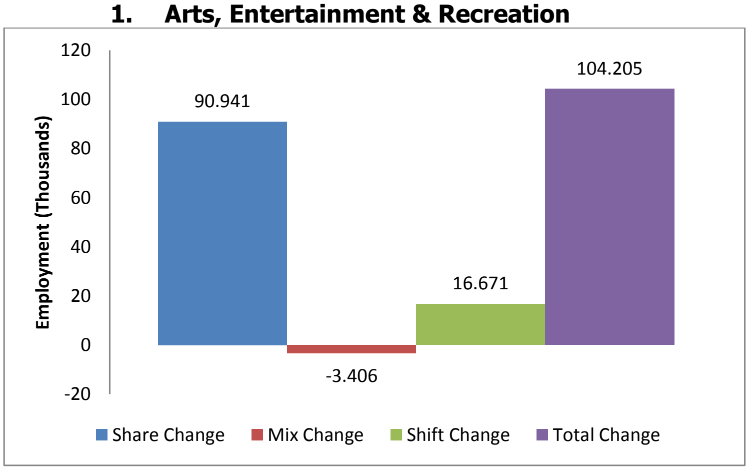
a. Share Change - Change of Industry Due to National Growth

Using the analysis and economic models from the Florida Counties Version 1.4.0 Build 2952 from Regional Economical Models, Inc. the following tables were developed. They are incorporate here as an illustration of the first, second and third areas of positive growth and first, second and third rank for negative growth.

This should give an image of where we can expect growth and where we should notice attrition in the scope of this five-year document. The first three graphs illustrate sectors where we will expect growth between 2010 and 2030. The last three are our areas of highest employment loss in those sectors over the same time period.

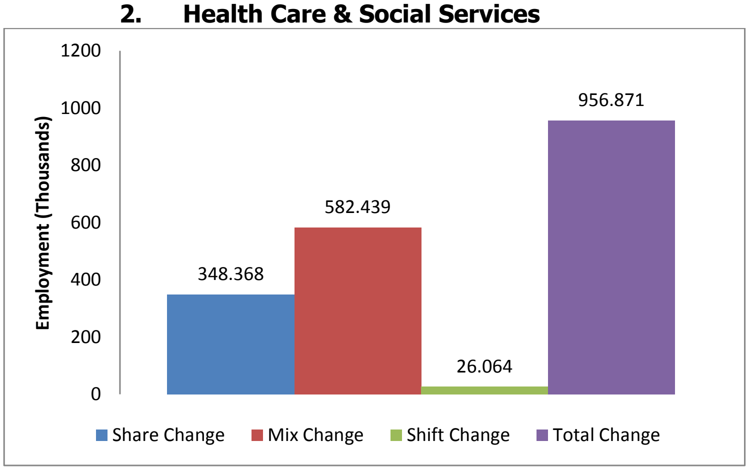
Three Areas of Positive Employment Growth 2010-2030

1. Arts, Entertainment & Recreation



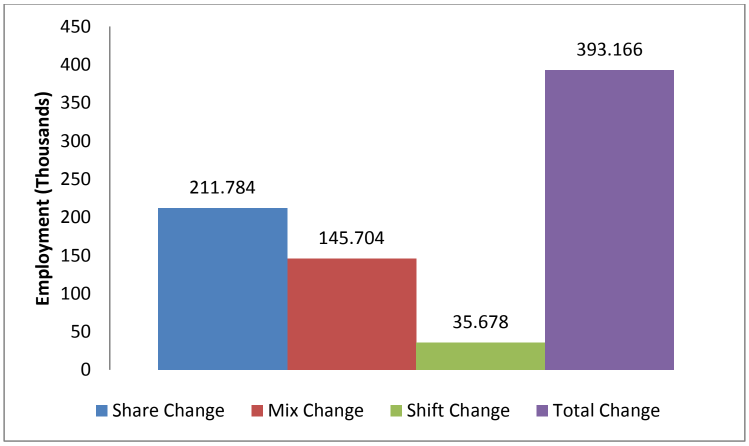
Source: REMI 2012

2. Health Care & Social Services



Source REMI 2012

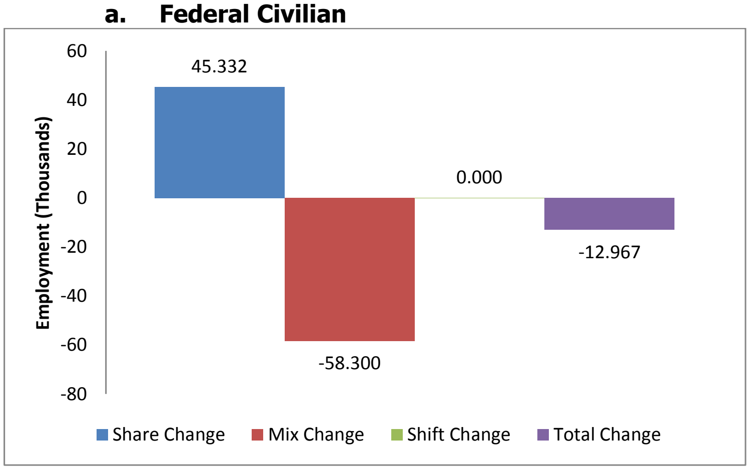
3. Professional, Scientific & Technical Services



Source: REMI 2012

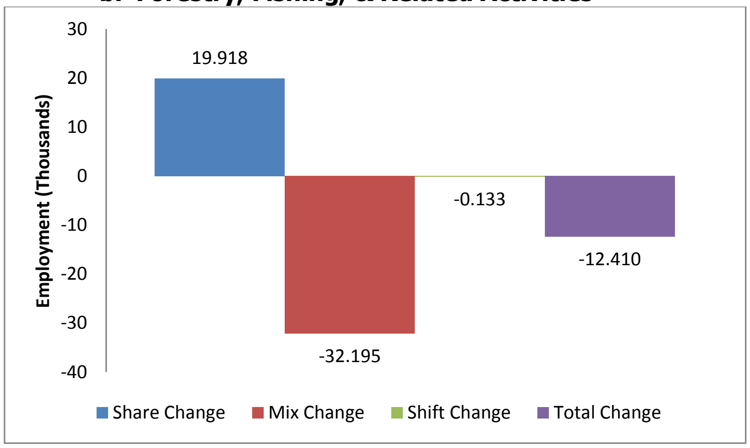
Three Areas of Highest Employment Loss 2010-2030

a. Federal Civilian



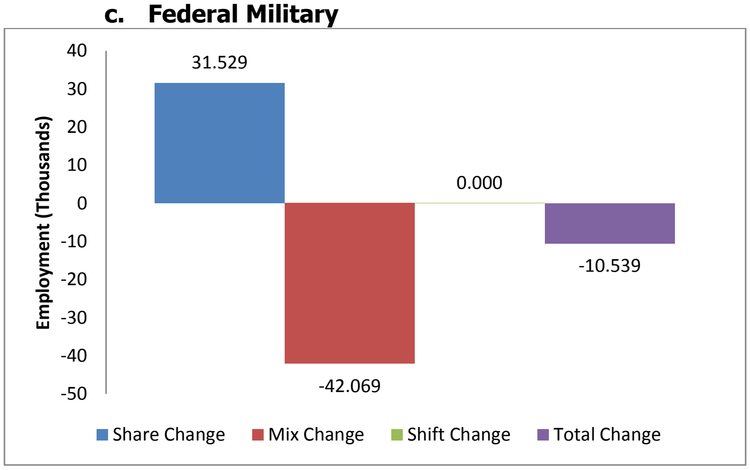
Source: REMI 2012

b. Forestry, Fishing, & Related Activities



Source: REMI 2012

c. Federal Military



Source: REMI 2012

b. Mix Change - Actual Industry Growth

INSERT TABLE AND PARAGRAPH HERE

c. Shift Change - Regional Competitiveness

INSERT TABLE AND PARAGRAPH HERE

d. Location Quotient Analysis

A Location Quotient and a Shift Share Analysis were preformed in order to determine the most important economic clusters in the region. The Location Quotient and Shift Share Analysis were performed at several different time periods (current, immediate, and future). This will enable the region to show trends and expectations in order to plan accordingly.

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

Where the purpose of this cluster analysis:

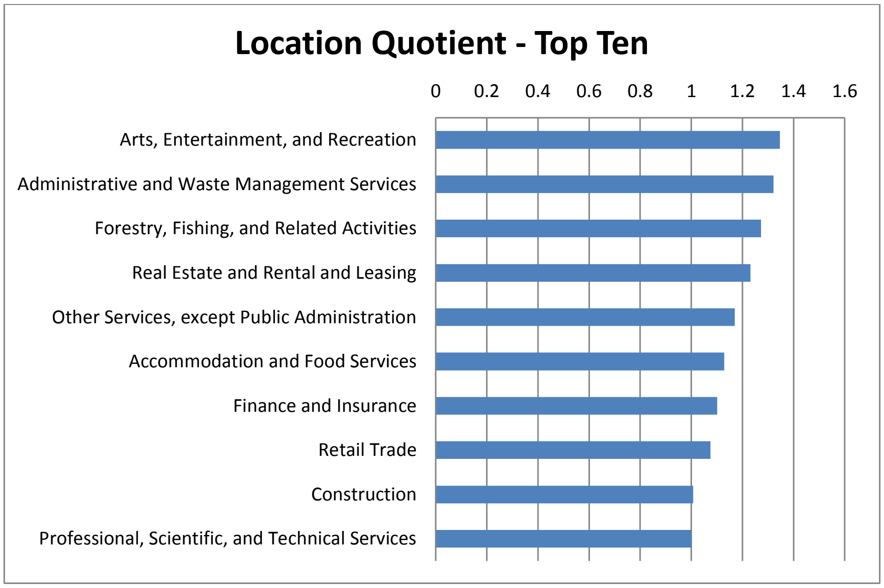
e_i = regional employment in industry i

e = total regional employment

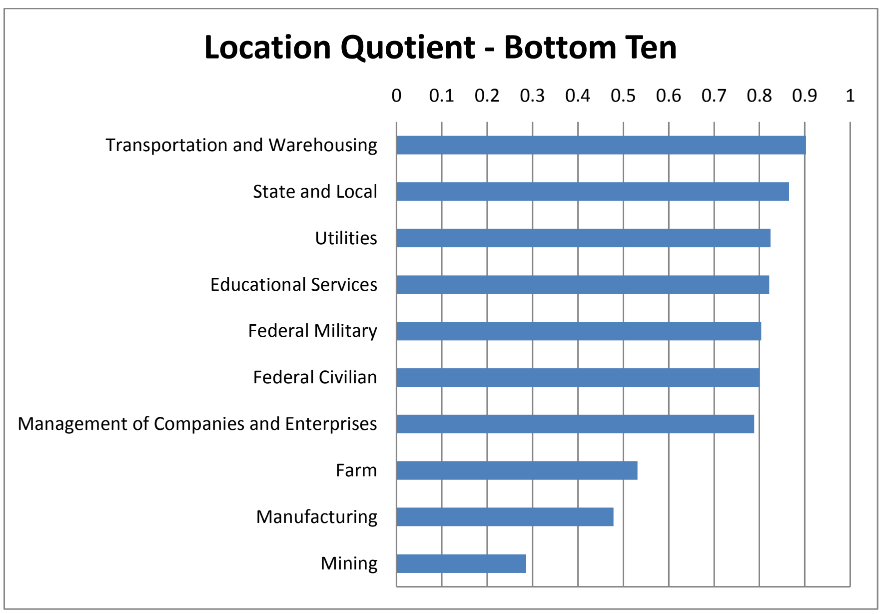
E_i = national employment in industry i

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

E = total national employment



Source: REMI 2012



Source:REMI 2012

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

9. State and Local Economic Development Plans Affecting the Region

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

a. Recent Economic Development Investments

b. Current Economic Development Investments

c. Anticipated Economic Development Investments

B. Performance Measures

1. Number of Jobs Created After Implementation of the Comprehensive Economic Development Strategy

a. Total Employment in Initial Year

b. Total Employment in Subsequent Years

2. Number and Types of Public Sector Investments Undertaken in the Region

a. EDA Sponsored Investments

b. **Significant State and Local Investments**

3. Number of Jobs Retained in the Region

a. Number of Jobs Retained as a Result of Federal Investments

b. **Number of Jobs Retained as a Result of Select State and Local Investments**

4. After Implementation of the Comprehensive Economic Development Strategy

5. Changes in the Economic Environment of the Region (Changes to Taxes & Fees, New Incentive Programs, etc.)

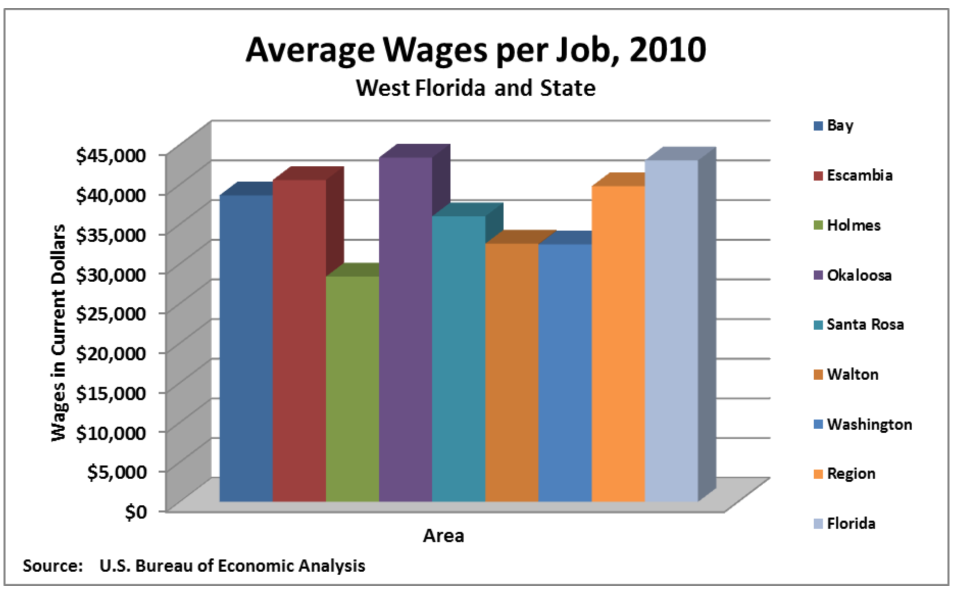
C. Six Pillars Measures

1. Talent Supply & Education

a. Average Annual Wage

Illustration C-1

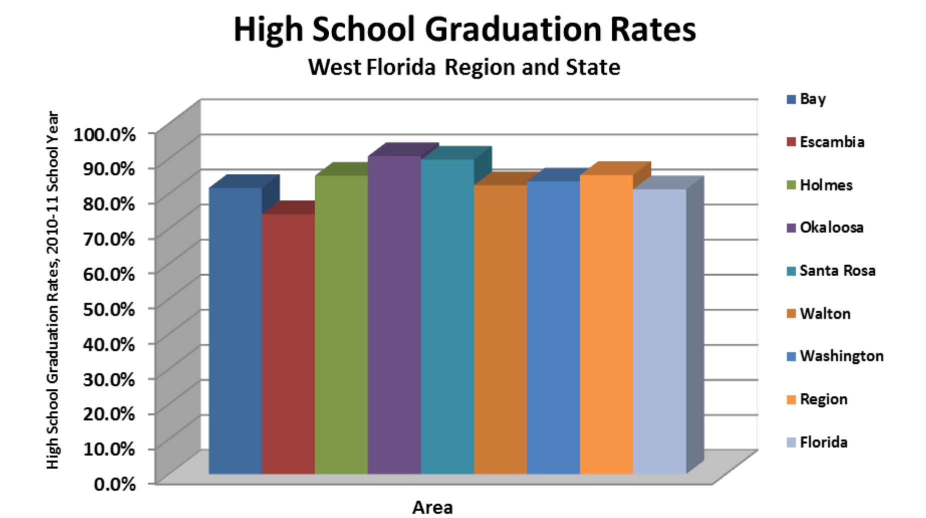
Average Annual Wages per Job
West Florida Region and State
Current Dollars
2010



b. High School Graduation Rates

Illustration C-2

High School Graduation Rates
West Florida Region and State
School Year 2010-11

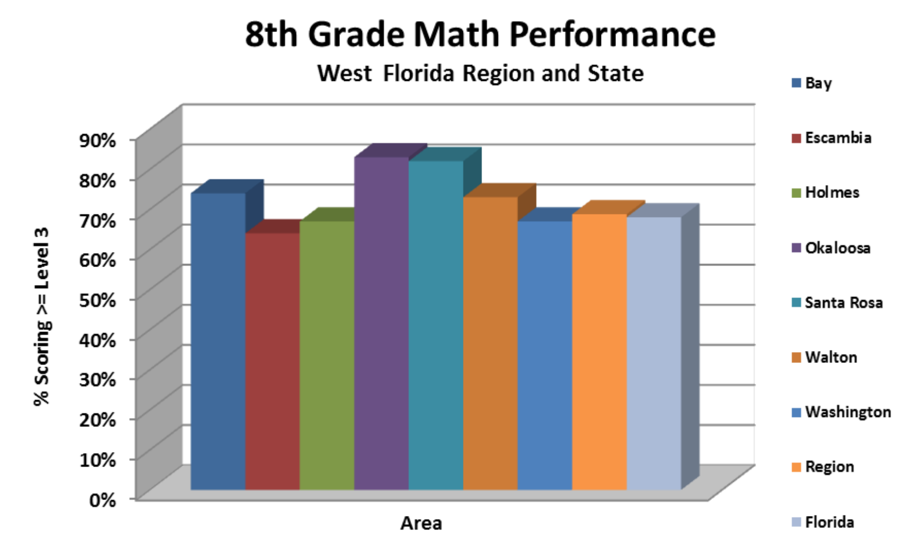


Source: Florida Department of Education, Data Publications and Reports: Students

c. 8th Grade Math Performance

Illustration C-3

**8th Grade Math Performance on the Florida Comprehensive Assessment Test
Percent Scoring >= Level 3 of 5
West Florida Region and State
2010**



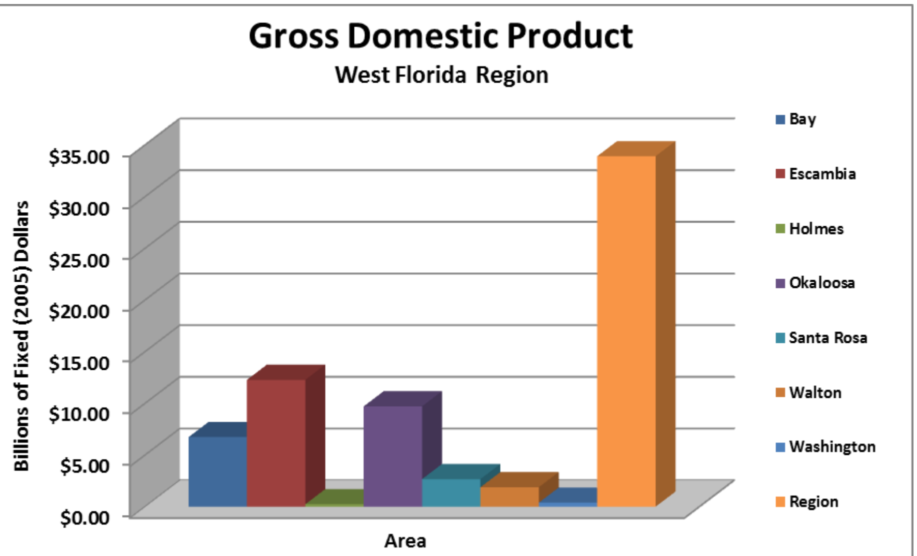
Source: Florida Department of Education, Florida Comprehensive Assessment Test

2. Innovation & Economic Development

a. Gross Domestic Product

Illustration C-4

Gross Domestic Product
West Florida Region
Billions of Fixed 2005 Dollars
2010

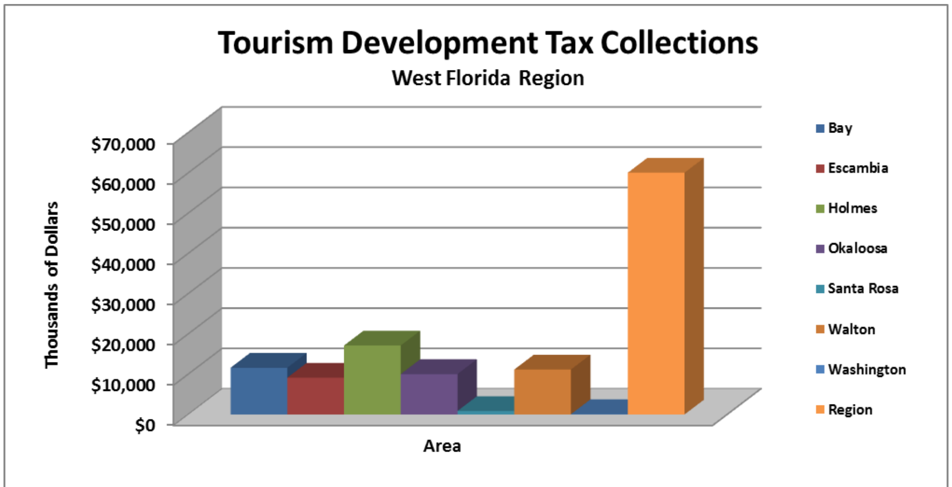


Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

b. Bed Tax Collections

Illustration C-5

Tourism Development Tax Collections
West Florida Region
Thousands of Dollars
Fiscal Year 2009-10

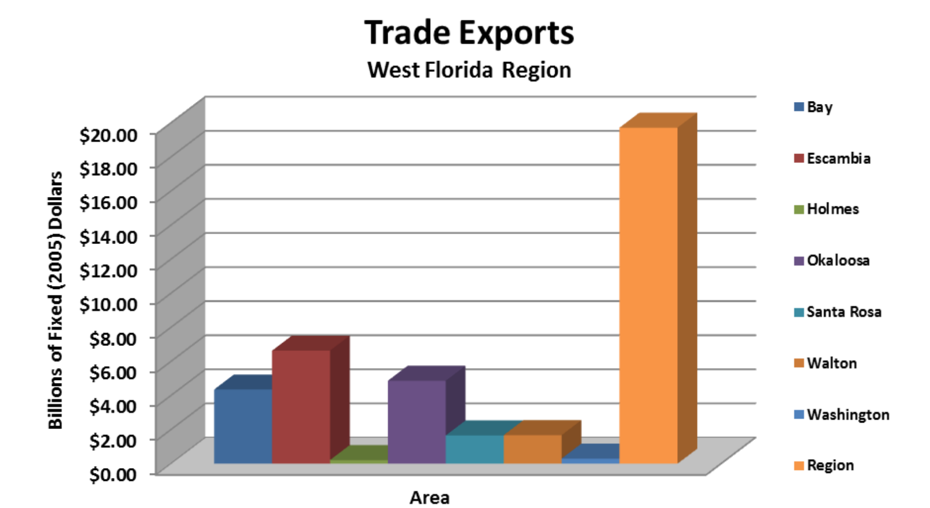


Source: Florida Department of Revenue, Local Government Tax Receipts by County

c. Trade Exports and Imports

Illustration C-6a

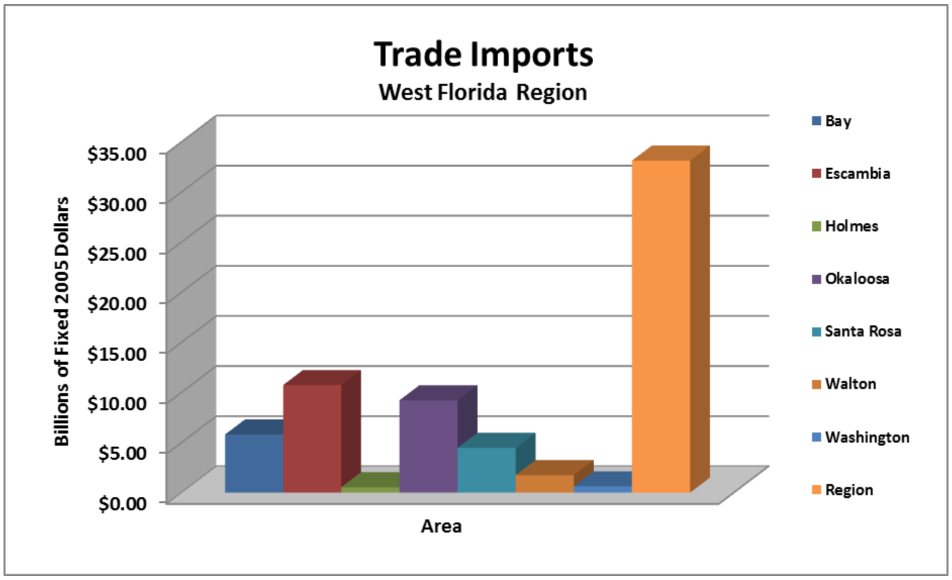
Trade Exports
West Florida Region
Billions of Fixed 2005 Dollars
2010



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

Illustration C-6b

Trade Imports
West Florida Region
Billions of Fixed 2005 Dollars
2010

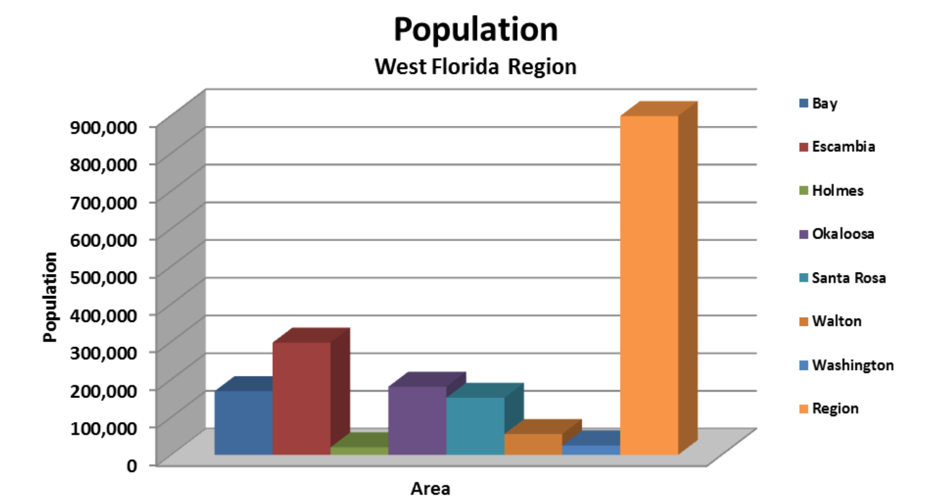


3. Infrastructure & Growth Leadership

a. Population Counts, Estimates and Projections

Illustration C-7

**Population Counts, Estimates and Projections
West Florida Region
2010**



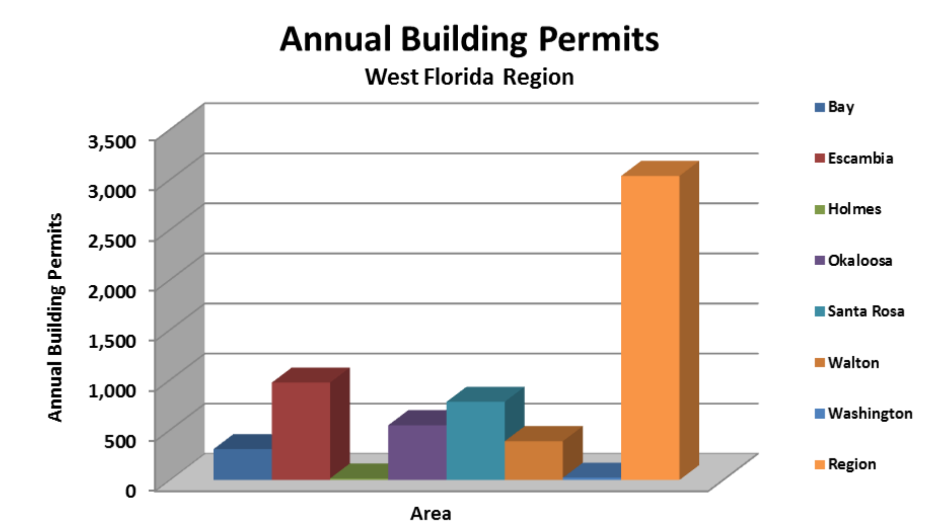
Source: Florida Statistical Abstract, 2011 Editions, Tables 1.20, 1.40

b

b. Building Permits

Illustration C-8

Annual Building Permits
West Florida Region
Residential Units
2010

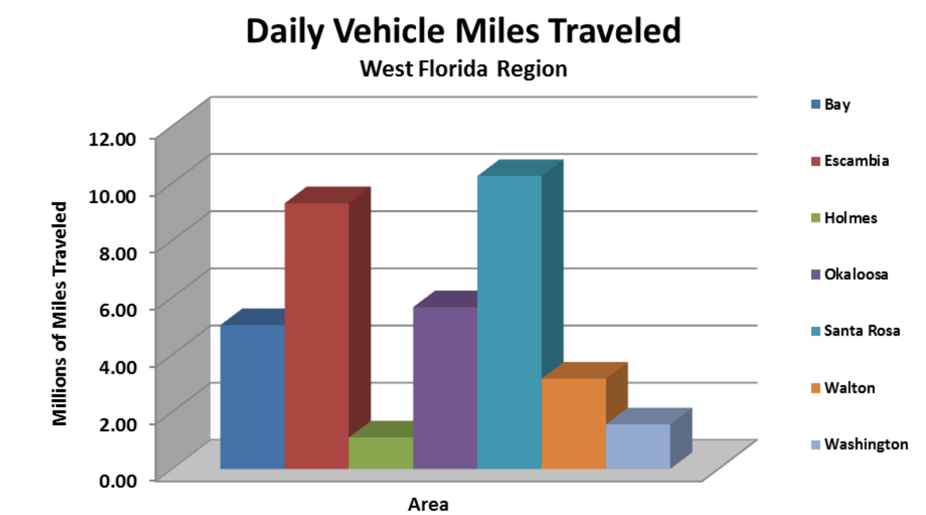


Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units

c. Vehicle Miles Traveled

Illustration C-9

Daily Vehicle Miles Traveled
West Florida Region
Millions of Miles
2010



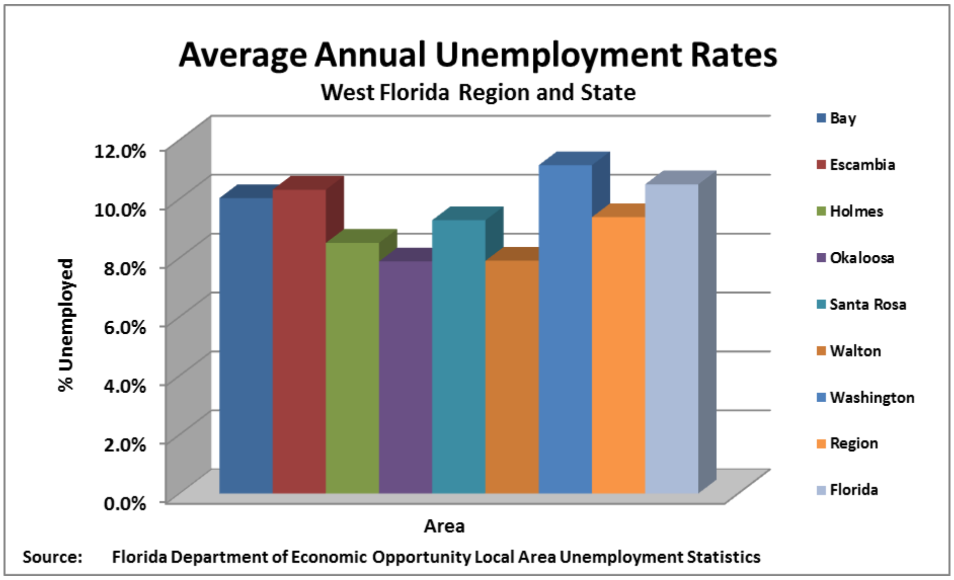
Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990

4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

Illustration C-10

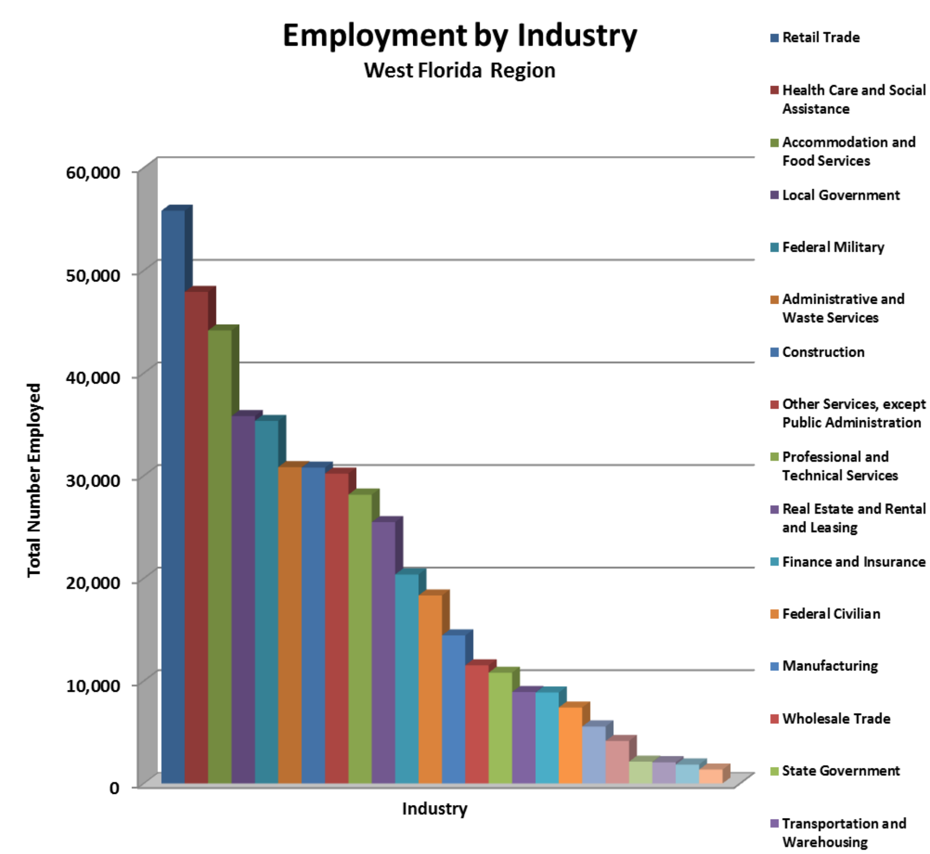
**Average Annual Unemployment Rates
West Florida Region and State
2010**



b. Employment by Industry

Illustration C-11a

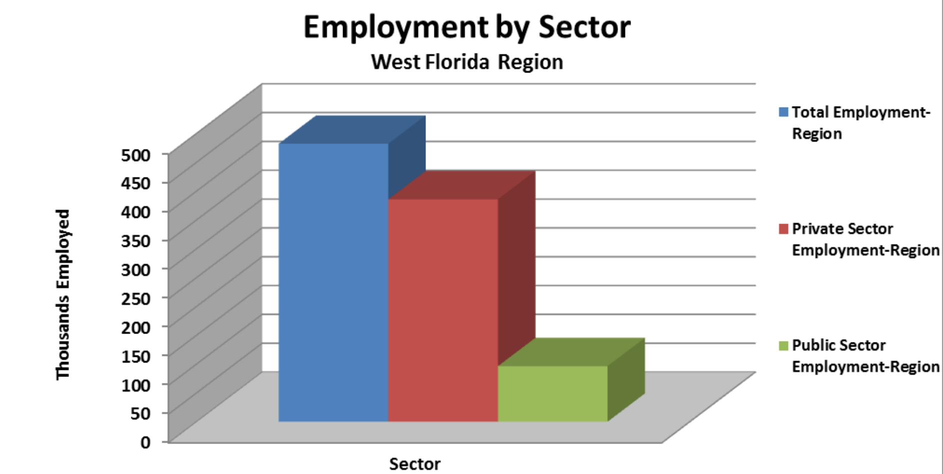
Employment by Industry
West Florida Region
2010



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

Illustration 11b

Employment by Sector
West Florida Region
2010

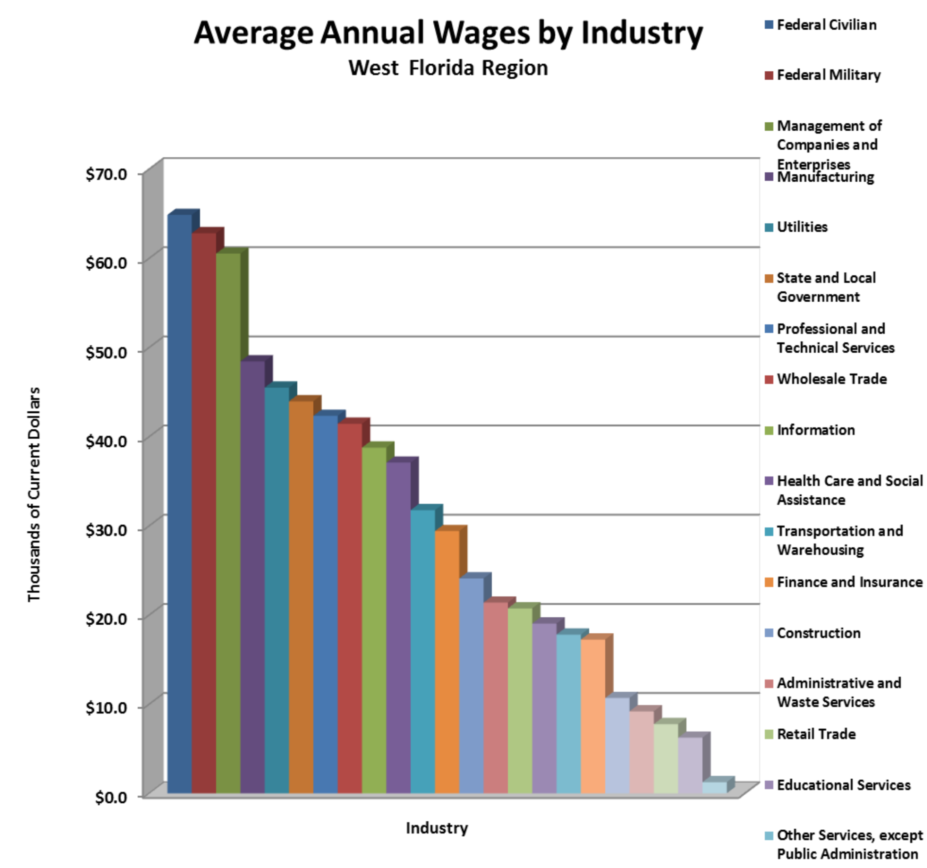


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

c. Wages by Industry

Illustration C-12a

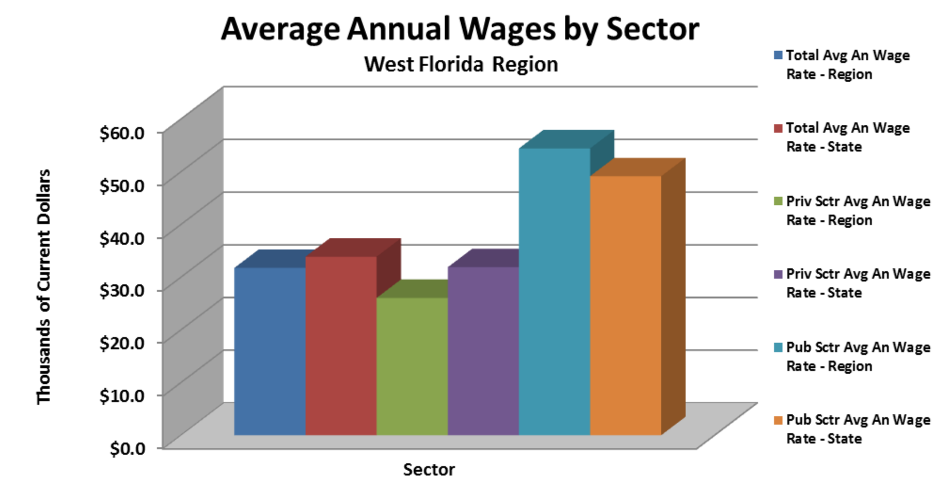
Average Annual Wages by Industry
West Florida Region
Thousands of Current Dollars
2010



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

Illustration 12b

**Average Annual Wages by Sector
West Florida Region
Thousands of Current Dollars
2010**



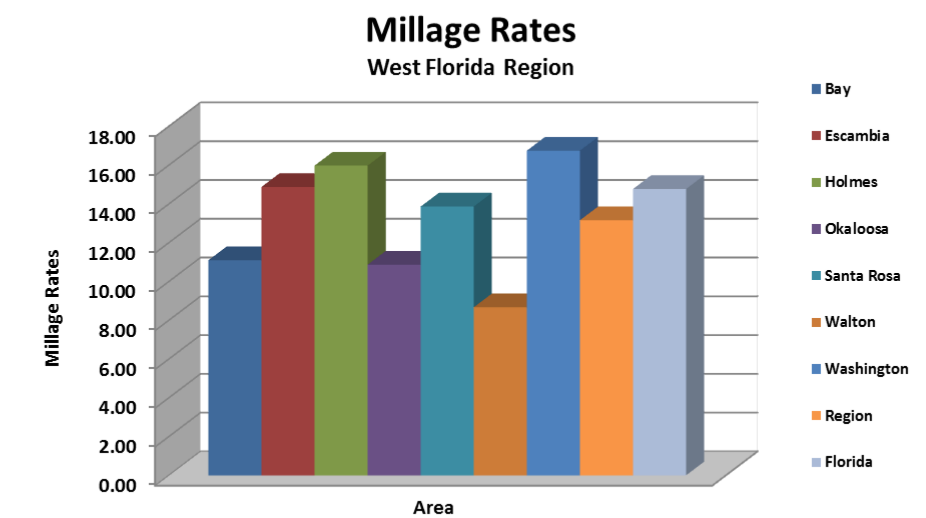
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

5. Civic & Governance Systems

a. Millage Rates

Illustration C-13

**Millage Rates
West Florida Region and State
2010**

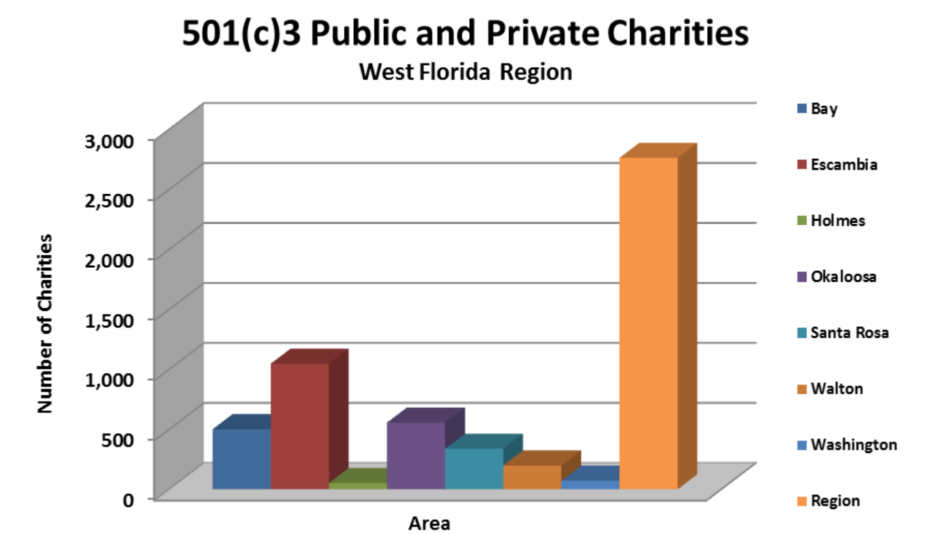


Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations

Illustration C-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
West Florida Region
2010

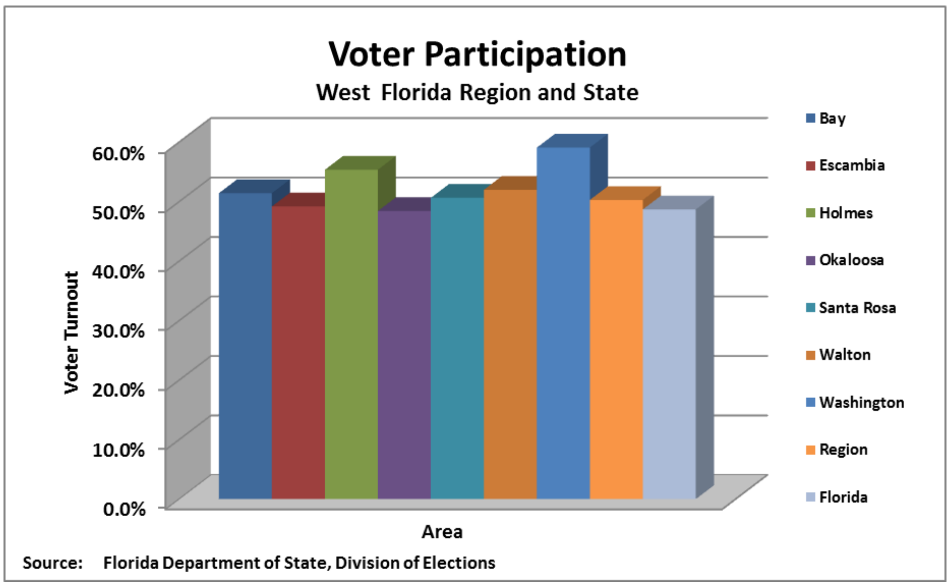


Source: The Urban Institute, National Center for Charitable Statistics

c. Voter Participation

Illustration C-15

Voter Participation
West Florida Region and State
Biennial General Elections
2010

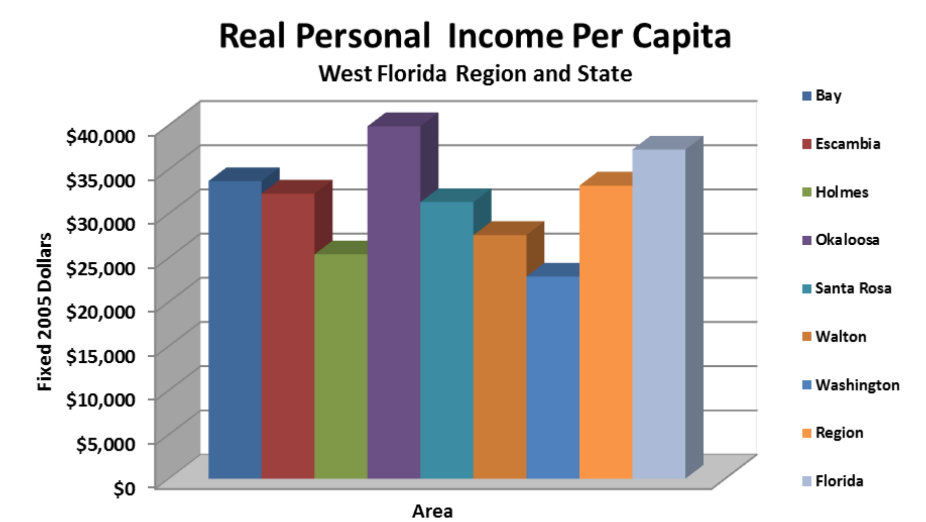


6. Quality of Life & Quality Places

a. Per Capita Income

Illustration C-16

Real Personal Per Capita Income
West Florida Region and State
Fixed 2005 Dollars
2010

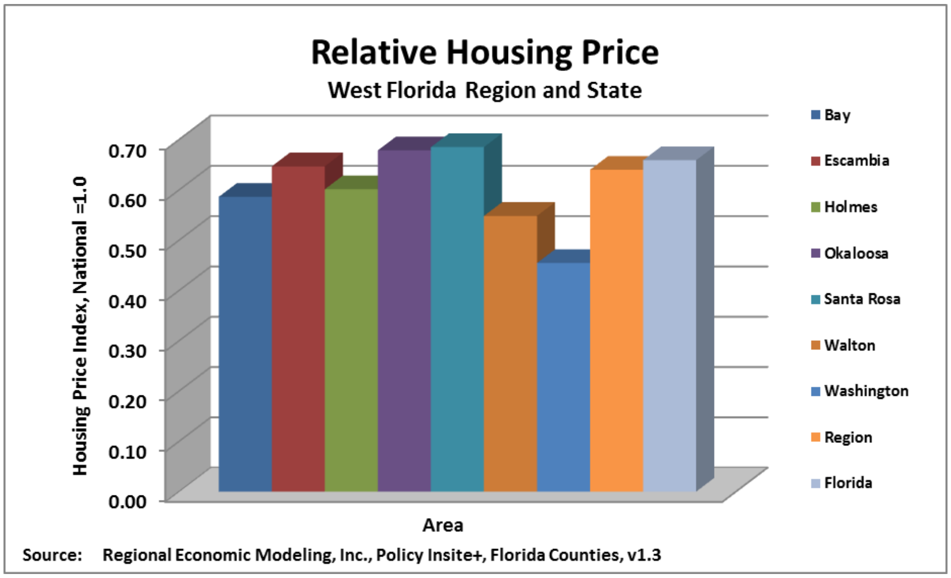


Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

b. House Purchase Price and Cost Index

Illustration C-17

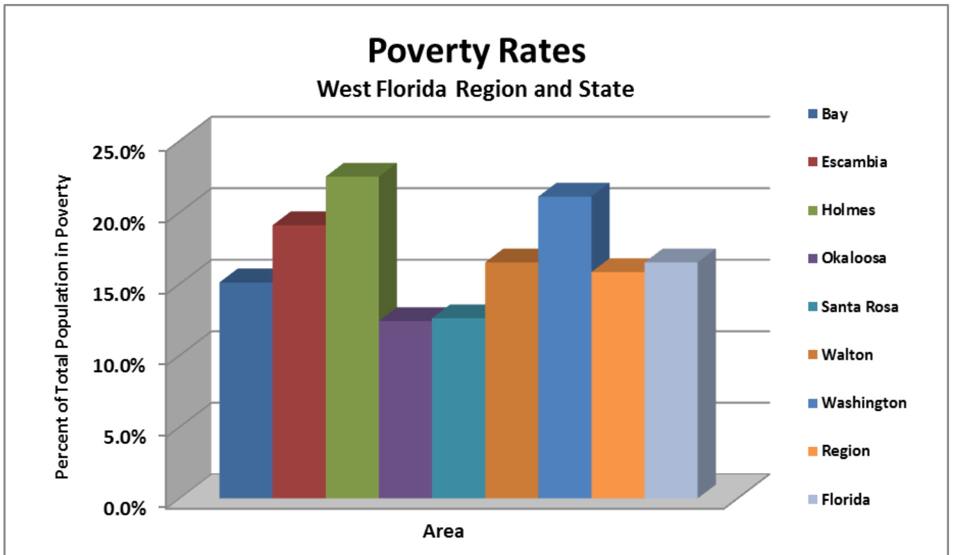
Relative Housing Price
West Florida Region and State
National Index = 1.0
2010



c. Persons Living in Poverty

Illustration C-18

**Percent of Persons Living in Poverty
West Florida Region and State
2010**



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

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

The Comprehensive Economic Development Strategy must include a section discussing the relationship between the communities in general and the private sector in the development and implementation of the Comprehensive Economic Development Strategy. Public and private sector partnerships are critical to the implementation of the Comprehensive Economic Development Strategy.

The members of the Comprehensive Economic Development Strategy Committee and Regional Planning Council will perform the policy guidance function of a Six Pillars Caucus.

THIS PAGE LEFT BLANK INTENTIONALLY

West Florida Regional Planning Council

Comprehensive Economic Development Strategy Team

~~Terry A. Joseph~~Austin Mount, Executive Director

*** Caitlin Cerame**

****Austin Mount~~Terry Joseph~~**

* Primary Responsibility
** Secondary Responsibility

THIS PAGE LEFT BLANK INTENTIONALLY

Formatted: Font: (Default) Tahoma, 10 pt

Use the QR Reader App
on your smart phone to
visit our website!

West Florida
Regional Planning Council

4081 East Olive Road, Suite A, Pensacola, FL 32514

www.wfrpc.org