

Recession Recovery...and Beyond

a Regional Study



A report to the citizens of Northeast Florida

Spring 2011

Jacksonville Community Council Inc.

Table of Contents

Study Volunteers	2
Executive Summary	3
Findings	4 - 21
Introduction	4
Regional Overview	4
Attracting Businesses and Jobs	7
Creating New Businesses and Jobs Locally	14
Retaining Businesses and Jobs	17
Future Trends	19
International Business and Globalization	19
Sustainability - People, Planet, and Profit	20
The Science, Technology, Engineering and Math (STEM) Pipeline	20
Next Jobs?	21
Conclusions	22 - 23
Recommendations	24 - 27
Resource Materials and Additional Reading	28
Appendix	28
Resource Speakers	29
About JCCI	30
Previous JCCI Studies	31

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Executive Summary

The Great Recession of 2007-09, as pundits are now calling it, hit Northeast Florida brutally. A regional economy that had been fueled by population and construction growth, consistently doing better than the national average, saw unemployment skyrocket when the housing market collapsed, the economy retracted, and population growth slowed to a trickle.

Jacksonville Community Council Inc. (JCCI) surveyed the community to identify residents' top priority for in-depth study. Job growth far surpassed any other regional issue. Volunteers and partner organizations from the seven-county region came together to explore new ideas for retaining existing jobs, rapidly creating new jobs, and for positioning the region for long-term economic growth.

The study committee visited the seven partner counties (Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns), examined existing job development plans and economic development strategies for the region, and explored promising practices from other regions that were achieving success despite the national economic climate.

The resulting recommendations are designed to enhance economic development and job creation, signaling to the state and nation that Northeast Florida is open for business.

Implementation of these recommendations will highlight Northeast Florida's existing assets and strengthen its competitive advantages in the economic world. Most significantly, action will build on Northeast Florida's successes and enhance the combined regional approach to competing in the global marketplace.

First, the region must focus on its key regional growth industries. The primary immediate opportunities for substantial job creation in the region are in the areas of:

- port logistics and associated industries
- health and medical sciences
- aviation/aerospace and defense contracting
- financial services

Second, the region must bring its business and education sectors together in a shared emphasis to build and maintain an educated and skilled workforce. Shifting economic realities, along with the skill sets required for job growth, necessitate the training (or re-training) of local workers and the retention of these skilled local workers in their employment positions. It also prescribes the need for attracting talented workers from around the world.

Third, economic success will require even more emphasis on encouraging the growth of small businesses. Enhancing the region's entrepreneurial spirit is critical to sustaining a vibrant economy. Improving access to support for small business development and expansion holds the potential for creating more jobs and more business owners.

Fourth, the region requires both a vibrant urban heart and an expanded vision of its assets and aspirations – unfettered by current boundary definitions. The outsider's view of Northeast Florida often begins with Jacksonville and its downtown core. A good first impression of the city, along with having strong economic development partners with a variety of different attributes, can have long term positive implications. Successful regional economic development also means rethinking the regions boundary lines and embracing all the potential Northeast Florida has to offer – such as the research capacities demonstrated by the University of Florida

Fifth, regional leadership must come together to encourage economic growth and enhance the business-ready environment of Northeast Florida. Regional leadership (political, business, and community) must maintain focus on reducing issues that unnecessarily add roadblocks to sustainable economic growth, by streamlining regulation and permitting processes, in order to improve Northeast Florida's competitiveness and economic success.

Together, the implementation of these recommendations can accelerate short-term job creation and, more significantly, strengthen the region's ability to sustain economic growth for years to come.

Findings

Introduction

In December 2007, the United States entered into a recession. While economists state that the official end of the recession was June 2009, the country (and Northeast Florida) continued to struggle economically. At the end of 2010, Northeast Florida was down over 65,000 net jobs from the pre-recession peak. Unemployment rates in the region at the end of 2010 ranged from 9.9 percent in St. Johns County to 15.5 percent in Flagler County. Both a JCCI community survey of 650 people and a statewide Leadership Florida Sunshine State Survey conducted in 2010 showed that jobs and job creation were the top concern among respondents.

The study committee set out to discover how Northeast Florida might:

1. Retain existing jobs;
2. Rapidly create new jobs; and
3. Position the region for long-term economic growth.

The study committee reviewed research and heard from resource speakers regarding strategies for attracting business relocations (how to create jobs through small business development and leveraging the presence of existing industries) and methods for retaining and expanding the businesses that are already located in Northeast Florida.

In the process of exploring the region's strengths and challenges in the areas mentioned above, study committee members visited the seven counties identified as part of the Northeast Florida Region (Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns). Committee members examined existing job development plans and economic development strategies for the region and met with economic development organizations, business support organizations, and other key public and private players in job creation, retention, and marketing.

Like Florida's other 60 counties, Northeast Florida's seven partner counties are suffering economically as a result of the national recession, which exposed Florida's dependence on the steadily increasing population as a primary driver for economic growth. Many of the issues that the study committee found were hindering the region's ability to bounce back from the jobless recovery pre-date the recession, and have only been exacerbated by the economic downturn and corresponding fiscal crises in local and state government. At the same time, the study committee found working regional partnerships and strong community assets in each of the partner counties, which provide a platform from which the region can grow.

Regional Overview

Northeast Florida is a region of 1.5 million people living in 27 municipalities. The seven counties of Northeast Florida are home to a diverse collection of communities including rural, urban, and suburban areas. This diversity is one of the characteristics of the region that makes it an attractive place to live; any number of lifestyles is possible.

Arguably, the best known cities in the region are Jacksonville, the region's major urban center, and St. Augustine, the country's oldest city and a major tourist destination. The region has highly valued quality of life assets like beaches, the St. Johns River, good climate, low housing costs, and abundant healthcare facilities. The region also has many factors appreciated by business concerns, including the availability of land, low taxes, low labor costs, excellent highway accessibility, rail, two deepwater ports, and local and state incentives.

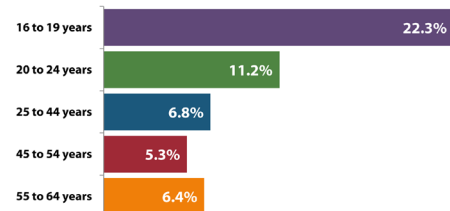
The region's land area covers 4,428 square miles, with 43 percent dedicated to agriculture (including silviculture), 24 percent conservation/recreation, 11 percent

residential/public use, 2 percent industrial/commercial, and 20 percent other uses (includes vacant, fallow and non-managed forest lands). The counties surrounding the urban center are mostly rural, relying on agriculture and service sectors, with a limited industrial base. These communities, however, are becoming increasingly urbanized and more economically diverse.

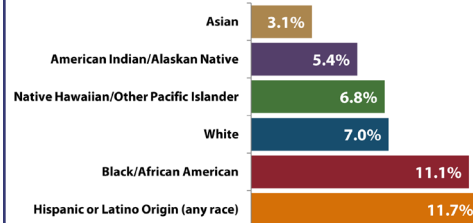
THE REGION'S RESIDENTS. Duval County is the most populous county in Northeast Florida with 900,000 of the region's 1.5 million residents, while Baker County is the least populous with 26,000 residents. The racial and ethnic makeup of the counties varies with some counties being more homogenous than others. Overall the region's minority population is 30 percent, which is closely aligned with the state of Florida and the United States. Northeast Florida is also a relatively young region where the average age is 39 years old.

Both young adults and some minority groups have suffered higher unemployment than others in the region. Unemployment in 2010 among 16-19 year olds was 22.3 percent,

Northeast Florida Unemployment Rate by Age



Northeast Florida Unemployment Rate by Race



Source: American Community Survey 2005-2009 5-Year Estimates.

and 11.2 percent for 20-24 year olds. Among minorities, unemployment is highest for Black (11.1 percent) and Hispanic persons (11.7 percent), while unemployment among the White population is 7 percent.

EDUCATION AND WORKFORCE. Educational attainment (secondary and postsecondary program completion) and education outcomes (i.e. standardized test scores, graduation rates, college readiness, etc.) are factors that influence both a community's intellectual infrastructure and its workforce capacity. These factors vary from county to county in Northeast Florida.

The Florida Department of Education rates public education districts using results from the Florida Comprehensive Assessment Test (FCAT). As of the 2009-10 school year, the region had four "A" rated districts, two "B" rated districts, and one "C" rated district. High school graduation rates ranged from 66 to 92 percent in the region. Measures of adult educational attainment show that 89 percent of all people in the region over the age of 25 have earned a high school diploma, and 21 percent have obtained a bachelor's degree or a higher educational credential. The rate varies across counties, with 37.6 percent of St. Johns County residents having earned a bachelor's degree or higher, compared to 6.7 percent of Putnam County residents.

Industries with low-skill, low-wage entry points thrived in pre-recession Northeast Florida. Many of those industries have remained stagnant or shed jobs regionally, including construction and tourism related industries. The workers who benefited most from those jobs are at a particular disadvantage when it comes to finding work. The unemployment rate among college graduates in the region averaged 3.9 percent from 2005 to 2009 as compared to 6.7 percent for those who did not finish high school and 12 percent for those who have a high school diploma.

A DIVERSE REGIONAL ECONOMY. The regional economy is as diverse as the people who live in Northeast Florida. The major industries in the region are Trade, Transportation, and Utilities; Education and Health Services; Professional and Business Services; Government; Leisure and Hospitality; and Financial Services. These industries employ 78 percent of the region's population. However, the largest employers in the region are typically government entities. For example, in five of the seven counties, the public school systems are the largest

employers. Small businesses also figure prominently in the region's mix of businesses, with firms employing less than one hundred employees making up 98 percent of all Northeast Florida companies. Throughout the study, four industries – health and biosciences, logistics, the military, and headquarters – were discussed as industry sectors that the region should focus on creating jobs.

REGIONAL ECONOMIC PARTNERSHIPS. The cohesiveness of the region as a singular economic entity is driven by the Cornerstone Regional Development Partnership, a private, nonprofit division of the Jacksonville Regional Chamber of Commerce, which acts as a regional marketing, prospecting and international trade partnership. Cornerstone offers a variety of services to businesses considering corporate relocation or expansion in Northeast Florida. The Cornerstone Partners include the following economic development organizations:

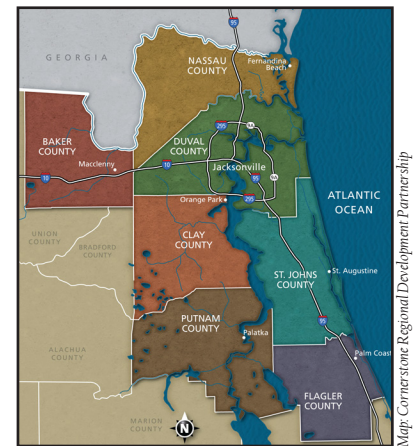
- Baker County Chamber of Commerce
- Clay County Chamber of Commerce
- Jacksonville Economic Development Commission
- Enterprise Flagler
- Nassau County Economic Development Board
- Putnam County Chamber of Commerce
- St. Augustine & St. Johns County Chamber of Commerce

Funding for the organization is provided by the partners, regional businesses, and local government. Many of the region's seven counties also have other geo-economically important relationships:

- Residents in Nassau County (5 percent) work in several South Georgia communities and vice versa.
- Baker and Putnam Counties are members of the 14 county North Central Florida Rural Area of Critical Economic Concern (RACEC) that extends westward to Jefferson County.
- Flagler and Putnam Counties belong to the Florida High Tech Corridor Council that encompasses Central Florida.
- Flagler County shares economic and higher education ties with Volusia County.

With these extra-regional partnerships, the Cornerstone counties connect to economic

Northeast Florida Regional Profile 2009-10



Population	1,537,294
Labor Force	754,553
Unemployment Rate	11.4%
Average Wage	\$34,359

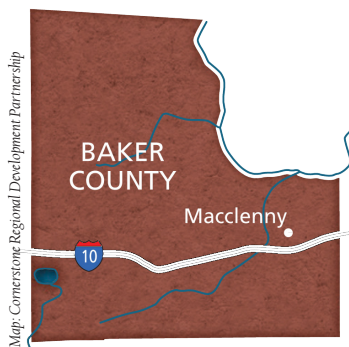
regions beyond Northeast Florida - north to Georgia, south to Orlando, and west to Tallahassee.

NEW ECONOMIC REALITIES. The national recession has taken a toll on the economic viability of Northeast Florida. High unemployment and joblessness persists. The 2010 regional unemployment rate of 11.7 percent does not include individuals who have given up the search for work or are underemployed, which includes part-time workers who would prefer full-time work and workers with high skill levels working in low-wage positions. As the economy improves, the unemployment rate may increase as those workers who had stopped looking for work actively resume their search.

Northeast Florida, like many regions in countries around the world, has entered a new era of austerity. Market and public policy uncertainties have fueled the reluctance of big businesses to hire workers and make capital expenditures, while capital for existing and start-up small businesses is extremely limited. Both of these realities limit private investment. Local governments are faced with falling tax revenues due to depreciated property values, which limits public investment. The result is stalled economic growth, which threatens the region's quality of life and future, long-term economic competitiveness.

Findings

Partner County Profile Baker County



Population 25,899

Labor Force 12,178

Unemployment Rate 10.9%

Average Wage \$29,503

Top 3 Private Employers

Northeast Florida Hospital
Wal-Mart Food Distribution Center
Macclenny Nursing & Rehabilitation Center

Top 3 Public Employers

Baker County School Board
Baker Correctional Institute
Baker County Medical Services

Site Selection Factors

- Availability of Advanced Information Technology Services
- Availability of Land
- Availability of Skilled Labor
- Corporate Tax Rate
- Energy Availability and Costs
- Highway Accessibility
- Inbound/outbound shipping cost
- Labor Costs
- Occupancy or Construction Costs
- Proximity to Major Markets
- State and Local Incentives
- Tax Exemptions

Quality of Life Factors

- Climate
- Colleges and Universities in the Area
- Cultural Opportunities
- Healthcare Facilities
- Housing Availability
- Housing Costs
- Low Crime Rate
- Ratings of Public Schools
- Recreational Opportunities

Area Development Magazine 2009
List is not ordered by importance

Regional Job Creation Strategies

Job creation is a complex enterprise that involves multiple groups and strategic efforts. Private enterprise, government, and individual job seekers each have a role to play.

Businesses create new jobs when it makes economic sense to do so. The projected economic benefits need to be greater than the initial investment, ongoing costs, and perceived risks. Businesses also need access to capital to invest in growth, a market for their products and services, and a regulatory environment that is responsive and predictable.

While governments do not directly create private sector jobs, all business is licensed by government, and the various levels of government can create conditions that make it easier and more efficient for the private sector to create or expand existing businesses. Governments also have access to incentive programs and tax credits meant to encourage business development, expansion, or relocation. Still, one resource speaker made the point that government tax credits to incent hiring mean nothing if consumers are not making purchases. Incentives can influence – when all else is equal – where a business decides to relocate or influence existing businesses to remain local and expand. However incentives do not drive relocation or hiring decisions.

Individuals also have a role to play in job creation. Workers, through education and training, can prepare themselves for the jobs that are available. According to the Bureau of Labor Statistics, one-third of the fastest growing jobs will require workers to have postsecondary credentials; those individuals who are undereducated and those communities with large populations of non-degreed/non-credentialed residents will continue to fare poorly even as the employment situation improves. In 2010, at the same time that the nation was experiencing record numbers of long-term unemployed, over two million jobs remained unfilled because workers' skills did not match job requirements.

Job creation strategies include bringing new businesses into a community; growing jobs through the support and development of small businesses and entrepreneurial enterprises; and encouraging existing businesses to stay local. Research indicates that up to 80 percent of new jobs are created by existing businesses, while 70 to 80 percent of a community's jobs are created by small businesses. At the same time 50 percent of such businesses fail within the first five years, according to the Small Business Administration. Focusing job creation efforts on just one approach - attracting, developing, or retaining businesses - can limit a community's economic development efforts.

Over the course of the study, these issues were identified as having a great impact on attracting, developing, and/or retaining jobs:

- workforce development
- visioning and branding
- small business and entrepreneurship
- regulation, incentives, and taxes
- regional leadership
- quality of life
- partnerships
- job creation priorities and opportunities
- education

What follows is an examination of these issues in the context of attracting, creating, and retaining businesses and jobs.

Case Example: Research Triangle

The Research Triangle Park was founded in January 1959 by a committee of government, university, and business leaders as a model for research, innovation, and economic development. By establishing a place where educators, researchers, and businesses come together as collaborative partners, the founders of the Park hoped to change the economic composition of the region and state, thereby increasing the opportunities for the citizens of North Carolina. The vision was to provide a ready physical infrastructure that would attract research oriented companies. They succeeded.

ATTRACTING BUSINESSES AND JOBS

Attracting new businesses to the regional community provides an opportunity to diversify the economy by drawing specific types of industries into the marketplace (i.e. high-tech, high-wage companies) and increasing the wealth of the community. Companies interested in relocating or expanding their operations will seek communities with a workforce that meets their needs, have comparatively low costs (i.e. labor, energy, utilities, and taxes), and have a high quality of life to encourage employee relocation.

Area Development Magazine provided a list of both the site selection criteria and the quality of life considerations that businesses weigh when making location choices. Many of the factors on the list, like land availability, geographic location, and climate, are beyond the control of the community and outside the dictates of public policy or community advocates.

Building a qualified workforce

Educational attainment, like the quality of public schools, informs employers about the quality of the local workforce. The percentage of persons who have earned a college degree is indicative of the region's economic competitiveness. For a community to compete successfully in the knowledge-based economy, 30 to 40 percent of the residents should hold a bachelor's degree.

Educational attainment at the postsecondary level in Northeast Florida varies across counties. If a highly qualified workforce is a primary consideration, then business prospects would be drawn to the counties in the region with the most degreed (associate's and bachelor's) residents – St. Johns (46 percent), Duval (34 percent), Clay (33 percent), and Flagler Counties (30 percent). *Associate's degrees are included here because the credential indicates the possessor has at least basic competency in writing, math and computer skills and/or specialized technical or industry training.*

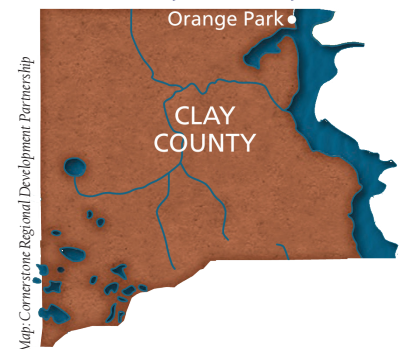
At present only one county in the region has close to the percentage of bachelor's-degreed residents needed to signal to the world that Northeast Florida is able to compete in a knowledge-based economy. In competing Southeastern counties, between 34 and 46 percent of their adult population have bachelor's degrees.

Having a college degree is also buffer against joblessness. In Northeast Florida, the unemployment rate increases as the rate of education decreases. This is true during both strong economic times and in a weaker economy. In 2009, those in the region without a high school diploma faced an unemployment rate of 17 percent; the same year, those with bachelor's degrees had an unemployment rate of five percent.

Due to the presence of multiple military installations, the region benefits from the skilled workers who leave the service and remain in Northeast Florida. At present there are over 50,000 current or former military personnel and Department of Defense employees in the region. Of the personnel who exit the military each year in Jacksonville, more than 3,000 choose to remain in the region.

Partner County Profile

Clay County



Population	185,518
Labor Force	95,766
Unemployment Rate	10.5%
Average Wage	\$31,843

Top 3 Private Employers

Orange Park Medical Center
Jacksonville Kennel Club
HCA Patient Account Service Center

Top 3 Public Employers

Clay County School Board
Clay County Sheriff's Department
Clay County Government

EDUCATIONAL ATTAINMENT IN NORTHEAST FLORIDA BY COUNTY

Population 25 and older

	Less than high school graduate	High school graduate	Some college, no degree	Associate's degree	Bachelor's degree or higher
BAKER	21.4%	78.6%	15.0%	8.0%	6.7%
CLAY	10.2%	89.9%	25.3%	10.2%	22.9%
DUVAL	12.7%	87.5%	22.9%	8.7%	25.2%
FLAGLER	10.5%	89.4%	26.3%	9.0%	20.8%
PUTNAM	22.4%	77.7%	17.1%	6.2%	12.9%
NASSAU	14.6%	85.2%	20.5%	6.7%	20.3%
ST. JOHNS	8.4%	91.6%	22.4%	8.2%	37.6%
NORTHEAST FLORIDA	14.3%	85.7%	21.4%	8.14%	20.9%

Source: American Community Survey S1501-Educational Attainment.
Data Set: 2005-2009 American Community Survey 5-Year Estimates.

COLLEGE EDUCATION ATTAINMENT IN COMPETING SOUTHEASTERN COUNTIES

Population 25 and older

	HILLSBOROUGH Tampa, FL	ORANGE Orlando, FL	CHARLESTON Charleston, SC	DAVIDSON Nashville, TN	FULTON Atlanta, GA
Associate's Degree	9.4%	10.1%	7.5%	5.8%	4.6%
Bachelor's Degree	28.7%	29.2%	36.8%	33.6%	45.9%
Total Associate's degree or higher	38.1%	39.9%	44.3%	39.4%	50.5%

Source: American Community Survey S1501-Educational Attainment.
Data Set: 2005-2009 American Community Survey 5-Year Estimates.

PERCENTAGE OF UNEMPLOYED PERSONS BY EDUCATION LEVEL IN NORTHEAST FLORIDA

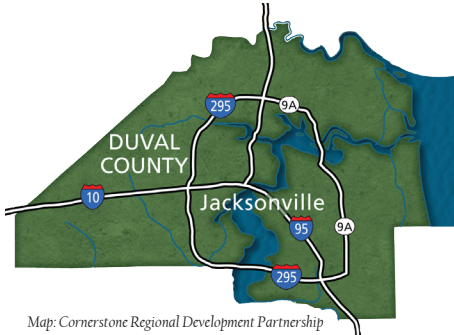
Ages 16-64

	Less than high school graduate	High school graduate (includes graduate equivalence)	Some college or Associate's degree	Bachelor's degree or higher
BAKER	16.8%	2.6%	6.6%	3.1%
CLAY	8.8%	6.6%	5.0%	3.2%
DUVAL	13.5%	7.3%	5.5%	3.3%
FLAGLER	12.2%	6.8%	5.9%	6.6%
PUTNAM	15.2%	7.5%	6.6%	3.3%
NASSAU	9.9%	10.5%	6.2%	3.5%
ST. JOHNS	7.6%	5.3%	5.0%	4.3%
NORTHEAST FLORIDA	12.0%	6.7%	5.8%	3.9%

Source: U.S. Census Bureau, 2005-2009 American Community Survey

Findings

Partner County Profile Duval County



Population	900,518
Labor Force	446,118
Unemployment Rate	11.7%
Average Wage	\$44,034

Top 3 Private Employers

Baptist Health
Blue Cross & Blue Shield of Florida
Mayo Clinic

Top 3 Public Employers

Naval Air Station Jacksonville
Duval County Public Schools
Naval Station Mayport

Case Example: Indianapolis

Indianapolis is very comparable to Jacksonville in terms of population and size, though Indianapolis has far fewer obvious natural amenities than Jacksonville. Despite not having the great natural assets or strategic geographic advantages of some other cities, Indianapolis has experienced success due to a focused agenda and consistent leadership.

Indianapolis is driven by strong leadership in both its public and private sectors. Over the past 36 years there have been four strong mayors - Democrats and Republicans - who each picked up where the last mayor left off in building downtown - and with it, the region. Each mayor remained focused by sustaining the vision.

One difference from Jacksonville, Indianapolis has benefited from strong philanthropic support in developing its long-range plan. Eli Lilly and Company, a Fortune 500 pharmaceutical company headquartered in Indianapolis, has a charitable foundation that lists enhancing quality of life as one of its missions.

Choosing “who we are” and “what we want to become”

We know “who we are”: Cornerstone and every economic development organization in the region can provide an impressive list of assets and characteristics, at the regional and county level, that make it clear why Northeast Florida is a great place to do business. Currently, those assets are used to market the region to firms who have a negative impression of or are unfamiliar with Northeast Florida. The region’s asset-based narrative differentiates Northeast Florida from its competitors by highlighting the positives: a good quality of life, strong logistics capabilities, abundant health/medical resources, multiple military facilities, and more. Efforts to create a regional brand identity based on those assets have met with varying degrees of success, including descriptive slogans like “Florida’s First Coast” and “America’s Logistics Center”. A location’s brand conveys to the consumer (residents, tourists, businesses) the type of experience to expect in a community. When CEOs are considering relocating or expanding their firms, the regions that stand out have values and branding reflective of the interested organization.

A VISION FOR THE FUTURE. It is not as clear that we know “where we are going”: Northeast Florida does not currently have a regional economic vision or plan. Successful communities have both, along with leaders willing to carry out that plan over a period of many years, without regard for changes to the political climate. The Mayor of Indianapolis credits his city’s success to 30 years of consistent leadership carrying out the same plan over time without regard for politics or political parties. In Oregon, Metro is a regionally elected governing body with taxing authority to implement the vision of over 1.5 million people in 25 cities within three counties. In Northeast Florida, developing an asset-based, long-term vision for the region’s future and obtaining the resource support to carry out the vision, combined with leaders willing to expend political capital toward those ends has yet to occur.

In 2009, the Northeast Florida Regional Council (NEFRC) sponsored Reality Check First Coast to update the Strategic Regional Policy Plan as required by Florida statute. Over 500 people from the seven-county region discussed future job, housing, transportation, infrastructure, and recreation needs. The Regional Community Institute, a non-profit spinoff of the NEFRC, is in the process of convening residents to develop a vision for the region tied to the implementation of Reality Check First Coast.

Working cooperatively and speaking with one voice

During the partner county site visits, the message was consistently positive regarding Cornerstone’s effectiveness in marketing Northeast Florida to attract businesses to the region. Enterprise Florida considers the partnership one of the strongest in Florida. As of 2010, the region was also designated as a Certified Economic Development District, which opens up a source of economic development resources from the United States Economic Development Administration. However, other collaborative efforts across counties are rare even though there are intersecting concerns where a regional effort might be appropriate for the purpose of greater economic competitiveness including education, branding, transportation, and tourism. During the study, an educator suggested a regional discussion about the role of K-12 education in making Northeast Florida more competitive was long overdue.

REGIONAL COOPERATION. Several opportunities exist for regional cooperation that leverage Northeast Florida’s collective assets. The region has several vital areas for tourism – St. Augustine, Amelia Island, and Palm Coast – but these areas are not promoted as a unit of opportunity. Northeast Florida also has two deepwater ports, which operate independently. Regional transportation may become a reality now that the Jacksonville Transportation Authority has been directed by the Florida legislature to develop a plan for a regional transportation authority. According to a 2009 Regional Transportation Agency Study, the absence of a Regional Transportation Commission limits the region from taking full advantage of its multi-modal transportation capacity.

DISTINCT COMMUNITIES. The seven counties discussed in this study are tied together economically via Cornerstone and the Regional Council, but each has distinct characteristics associated with being primarily rural, suburban, or urban. There is a sense of place that bolsters those communities, along with a sense of pride. In the rural counties, meeting participants spoke of wanting to keep their community's distinct character intact. This community identification can either be leveraged in the quest to define the region or can create tension especially as it relates to quality of life. Those counties watching their more urban neighbors struggle with crime, education, and traffic congestion do not want to have those issues invade their communities. At the same time Jacksonville – the region's urban center – is the business and cultural center of Northeast Florida.

Identifying winners and losers within the region often devalues the region as a whole. A resource speaker shared a story about real estate agents who suggest that newly relocating executives live in St. Johns County because children will receive a higher quality education than in Duval County. One of the messages this can send an executive is that his/her workforce, the majority of which live in and may have been educated in Duval County, will be subpar. These messages can discourage business investment in the region.

Living, playing, working, and doing business in Northeast Florida

During each partner county site visit, residents said their communities had a high quality of life, citing the county's natural beauty, rural charm, outdoor recreation, abundant waterways, high quality health care, the NFL's Jacksonville Jaguars, educational opportunities, and various arts, culture, and entertainment amenities. Other positive quality-of-life factors can be added to that list as well, including falling crime rates.

Housing prices have also fallen, and while this is good news for those seeking to buy homes, it does not bode well for either property tax collections or the net worth or mobility of homeowners.

Healthcare facilities including hospitals, nursing homes, clinics and other licensed facilities are abundant in the region.

One of the quality-of-place issues where the region continues to struggle is acceptance of diversity and protections for minority rights. Concerns include a lack of progress in race relations, religious intolerance, and the failure to prevent discrimination in employment and housing based on sexual orientation and gender identity at the local and state level. These concerns can hinder efforts to attract corporate headquarters and a highly-skilled workforce.

NORTHEAST FLORIDA MEDIAN HOME SALES

	Median Sales Price, Single Family Homes 2009	Median Sales Price, Single Family Homes 2008
BAKER	\$145,500	\$160,000
CLAY	\$168,350	\$190,000
DUVAL	\$170,000	\$174,000
FLAGLER	\$165,000	\$185,450
NASSAU	\$215,000	\$316,500
PUTNAM	\$111,000	\$128,750
ST. JOHNS	\$249,450	\$260,450
NORTHEAST FLORIDA	\$175,042	\$202,164

Source: Florida Housing Data Clearing House

NORTHEAST FLORIDA HOSPITALS AND MEDICAL FACILITIES

	Hospitals	Hospital Beds	Other Medical Facilities Licensed by AHCA
BAKER	2	1163	19
CLAY	2	335	168
DUVAL	12	2901	1008
FLAGLER	1	99	100
NASSAU	1	54	64
PUTNAM	1	99	73
ST. JOHNS	1	323	151
NORTHEAST FLORIDA	20	4974	1583

Source: Florida Agency for Health Care Administration (AHCA)

Partner County Profile Flagler County



Population	94,901
Labor Force	33,498
Unemployment Rate	15.5%
Average Wage	\$30,486

Top 3 Private Employers

Palm Coast Data Ltd.
Florida Hospital Flagler
Hammock Beach Resort

Top 3 Public Employers

Flagler County School System
Flagler County Sheriff's Office
Flagler County Clerk of Courts/Justice
Center

Case Example: Lake Nona Medical City

In an effort to compete for the Scripps Research Institute in 2003, the Tavistock Group agreed to set aside 650 acres for a planned medical city complete with retail stores and housing at Lake Nona. Orlando lost the Scripps deal to Jupiter, Florida, a decision made due in part to Orlando's lack of a medical school.

Three years later, the Burnham Institute for Medical Research, in exchange for a \$310 million incentive package, accepted an opportunity to be co-located with the new University of Central Florida College of Medicine. Construction is now underway on Nemours Children's Hospital and the Orlando VA Medical Center. Both facilities are scheduled to open in 2012.

In addition, the University of Florida recently broke ground on a Lake Nona academic and research center, which will house a Comprehensive Drug Development Center, the UF College of Pharmacy doctoral program and biomedical research laboratories.

Findings

Partner County Profile

Nassau County



Map: Cornerstone Regional Development Partnership

Population 72,588

Labor Force 36,317

Unemployment Rate 10.9%

Average Wage \$34,981

Top 3 Private Employers

Amelia Island Plantation
The Ritz-Carlton Amelia Island
Smurfit-Stone

Top 3 Public Employers

Nassau County School Board
Federal Aviation Administration
Nassau County

QUALITY-OF-LIFE VS. THE SITE SELECTION BUSINESS CASE. While Cornerstone focuses on the region's quality of life as a key selling point to business prospects, the study committee heard that a community's quality of life, while important, is not the make-or-break factor for business prospects and site selectors. In some cases this is because the company's owners will not live in the local community and in other instances the business case for relocation or expansion outweighs the quality of the community.

Though site selection factors may take primacy over a community's quality-of-life factors, companies are not likely to invest in communities deemed undesirable because of poor education, health, and public safety outcomes. When communities are not willing to invest in a quality future, there is a risk that private enterprise (new and existing businesses) will forgo investment as well.

Working together to encourage business development

A region's economic competitiveness is enhanced by the partnerships between the entities that control the component pieces of economic development, including economic development organizations, higher education, government, and private enterprise. In Northeast Florida, the relationship among these groups is said to be strong, often cultivated via board memberships, along with participation in organizations like Cornerstone, the Northeast Florida Regional Council, and WorkSource.

Existing relationships are used to market the assets of the region. At present, however, these alliances are relatively informal. A formal economic development partnership arrangement between government, private enterprise, and higher education in Northeast Florida does not yet exist. As a result, leveraging the research power of the University of Florida has been a struggle. Though the university provides services to Northeast Florida, it serves as a leading economic development partner in Central Florida in a partnership with the Universities of Central and South Florida. No vehicle currently exists that could invite the University of Florida to bring its resources to bear for the economic development future of Northeast Florida.

Case Example: Oklahoma City

In the early 1990s, the leaders of **Oklahoma City** were faced with a decision: to compete or retreat. A visionary project was launched: Metropolitan Area Projects (MAPS), an ambitious program that is one of the most aggressive and successful public-private partnerships ever undertaken in the United States. The amount spent in this public/private partnership exceeds \$3 billion.

MAPS was funded by a self-imposed, five-year, one-cent sales tax approved by city voters in December 1993. The tax expired on July 1, 1999. The tax was extended by a vote of the people for six months to cover cost increases during construction. The tax is complete and the projects are all debt-free.

In December 2009, a record number of **Oklahoma City** voters went to the polls and voted YES to continue **Oklahoma City's** future through the \$777 million MAPS 3 initiative. MAPS 3 includes eight projects that will work to increase the quality of life for all **Oklahoma City** citizens, as well as create economic growth through private investment and the creation of jobs.

Targets for bringing new business to the region

Northeast Florida has significant opportunities to strategically focus its business development efforts. Cornerstone targets the following industries for business relocation and new business development: advanced manufacturing, aviation and aerospace, finance and insurance services, headquarters, information technology, life sciences, and logistics and distribution. Determining which targets are right for Northeast Florida includes a review of the businesses that are already concentrated in the region as well as research-based analysis. Each county also tweaks those targets based on the unique capacity of their communities. The target industries are re-assessed every three years and provide a framework for business development.

Case Example: Florida High Tech Corridor

The **Florida High Tech Corridor Council (FHTCC)**, founded in 1993, is a regional economic development initiative of the University of Central Florida (UCF), the University of South Florida (USF) and the University of Florida (UF) whose mission is to grow high tech industry in the region through research, workforce development and marketing programs.

The partnership involves more than 25 local and regional economic development organizations (EDOs) and 14 community colleges. The Council is co-chaired by the presidents of UCF, USF and UF. The unique partnership has resulted in a strategic approach to high tech economic development that involves matching funds research, workforce development and a marketing program leveraging governmental, EDO and corporate budgets on a regional rather than local basis.

Limited resources require a targeted approach for attracting business because “shotgun” or unfocused tactics are inefficient and costly. The State of Florida also provides incentives (Qualified Target Industry Tax Refund) for companies that create high-wage jobs in target high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal property, insurance premiums, and other taxes. Both new and expanding businesses in selected targeted industries or corporate headquarters are eligible. Other incentives for target industries include the Qualified Defense and Space Contractor Tax Refund, Capital Investment Tax Credit, and High Impact Performance Incentive Grant.

In addition to creating jobs, attracting headquarters to the region has the added benefit of creating wealth in the community. When headquarters are located in the region, it means that Northeast Florida is always “top of mind” when decisions are being made with regard to expansion, investment, and philanthropic giving. Jobs within headquarters also pay higher salaries. High-level executives add to the region’s civic, social, and political capacity as well. Although the region is home to seven Fortune 1000 Companies, more than any other Florida region, the region would benefit from attracting both small fast-growing companies with annual revenues of \$50 to \$100 million, as well as, larger well-known Fortune list companies.

Quality public education systems and higher education offerings

K-12 public education relates to both the quality of the workforce and the quality of the region’s communities.

All students in Northeast Florida participate in curriculums that prepare them for a career or college. The prevailing idea is that colleges and employers are looking for the same set of skills. Once a student graduates from high school he or she should be worthy of investment by either academia or the business world. To make high school education relevant to young people, the region’s Career Academies provide job-relevant education that offers students an industry certification as well as an academic direction, should students decide to continue their education. The academies have been credited with supporting high academic outcomes in St. Johns County where the career academies have ties to both postsecondary institutions and local industries, including Stellar, Northrop Grumman, Flagler Hospital, and Embry–Riddle Aeronautical University.

The intermingling of work and college preparation addresses several regional realities. At least one-half of the region’s high school graduates will go directly to work. At 21 percent, average college attainment regionally is low compared to other communities. Most people in the United States do not graduate from college; the national average is 30 percent. Secondary education that exposes students to work and the educational path needed to move along in a career can be beneficial for life long career success.

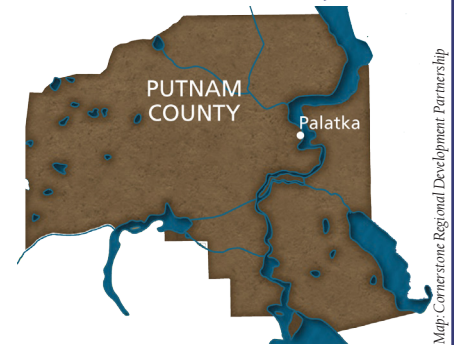
Case Example: San Diego

CONNECT was formed in 1985 by the City of San Diego, UC San Diego and the private sector to stimulate the commercialization of science and technology discoveries from local research institutions. CONNECT has assisted in the formation and development of more than 2,000 companies and is widely regarded as the world’s most successful regional program linking investors and entrepreneurs with the resources they need for commercialization.

Northeast Florida’s Fortune 1000 Companies

- CSX Corporation
- Fidelity National Financial
- Fidelity National Information Services
- Landstar System, Inc.
- MPS Group, Inc.
- PSS World Medical
- Winn-Dixie

Partner County Profile Putnam County



Population 74,608

Labor Force 33,226

Unemployment Rate 12.6%

Average Wage \$33,908

Top 3 Private Employers

Georgia Pacific Corporation, Palatka
PRC
Seminole Generating Plant,
a Division of Seminole Electric Cooperative

Top 3 Public Employers

Putnam County School Board
St. Johns River Management
Putnam County Government

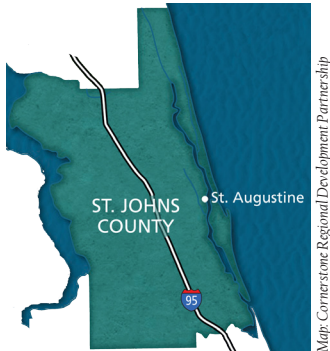
Northeast Florida Higher Education Institutions

Columbia College
Daytona State College (Volusia County)
DeVry University
Edward Waters College
First Coast Technical College
Flagler College
Florida Coastal School of Law
Florida Gateway College (Columbia County)
Florida State College at Jacksonville
ITT Technical Institute
Jacksonville University
Jones College
Keiser University
Logos Christian College and Graduate School
Nova Southeastern University
Southern Illinois University Carbondale
St. Johns River State College
St. Leo University
Trinity Baptist College
Troy University
University of Florida
University of Florida College of Pharmacy –
Jacksonville Campus
University of North Florida
University of Phoenix
University of St. Augustine for Health Sciences
Webster University Graduate School North
Florida

Findings

Partner County Profile

St. Johns County



Population 183,572

Labor Force 97,450

Unemployment Rate 9.5%

Average Wage \$35,758

Top 3 Private Employers

Northrop Grumman
Flagler Hospital
Florida School for the Deaf & Blind

Top 3 Public Employers

St. Johns County School District
St. Johns County
U.S. Air National Guard

Case Example: Jax YPOs

Efforts to make the region more appealing to the young and well-educated include the proliferation of young professionals organizations (YPOs). In 2000, there were less than five YPOs, including JCCI *Forward* and Rotaract. Today, over 40 of these groups exist, including professional networking (ImpactJax), philanthropy (Shircliff Society), and the arts (Theatre Jacksonville Apprentices).

Despite these and other efforts to become a destination for young professionals, the perception persists that Northeast Florida can neither attract nor hold on to the young and well-educated. "We are facing a brain drain," shared a study resource speaker, "the best and the brightest are using our resources and leaving."

COLLEGE DEGREE DENSITY IN COMPETITOR MSAs

People with college degrees per square mile

Jacksonville - 167

Miami	Atlanta	Charlotte	Tampa	Orlando	Birmingham
1,633	1,035	746	616	538	210

Source: *The Density of Smart People*. www.creativeclass.com

COLLEGE AND CAREER READINESS. While graduation rates in the region are improving, there is a disconnect between high school success and college readiness for many students in the region. This disconnect may be indicative of workforce readiness as well, since high school curricula no longer prepare students for either work or college, but both simultaneously.

Common placement tests (CPT) results vary widely depending on the district and the high school from which students graduate.

- St. Johns County graduates made the strongest showing in the region. In 2009, 21 percent of that district's 1,002 students who took the common placement tests in math, reading, and writing required remediation; 78.9 percent did not.
- During the same year, 74 percent of the 90 William Raines High School graduates who took the CPT required remediation – the highest in the region, while 1.3 percent of the 228 Stanton College Preparatory graduates who took the CPT required remediation – the lowest in the region.

There is also a correlation between the higher education institution that graduates attend and the likelihood of remediation. Graduates attending state universities are less likely to need remediation than their peers attending a community or state college. This may be a reflection of the fact that Florida's state and community colleges are open-enrollment institutions, while the state universities have more stringent entrance requirements.

In 2009, 49 percent of the students graduating from a high school in Northeast Florida and attending Florida State College at Jacksonville (FSCJ) required remediation as did 50 percent of the region's students attending St. Johns River Community College (SJRSC). Those percentages have not varied much since 2007. Over the same period, less than 5 percent of the region's graduates attending the University of North Florida required remediation. Duval County graduates made up the greatest proportion of FSCJ and UNF students, while Clay County graduates made up the greatest proportion of SJRSC students.

From 2007 to 2009, on average, 35 percent of high school graduates in Northeast Florida attending a state college or university required remediation in math, reading, or writing.

HIGHER EDUCATION AND THE WORKFORCE. In addition to the two state colleges and the public university mentioned previously, Northeast Florida also has two private colleges, one private law school, several public and private college/university satellite campuses, a wide range of technical schools, and various private proprietary institutions. The graduates from these institutions, when they remain local, contribute to building a stronger regional workforce by increasing the number of degreed residents.

Preventing brain drain: Attracting and retaining a quality workforce

The 2006 JCCI study, *Attracting and Retaining Talent* concluded that, "successful communities rely on information, innovation, inclusion, and intellect to compete for talent. Jacksonville already has many of the ingredients necessary for success along with a high overall quality of life. Recognizing what the community has to offer and what it lacks is critical for focusing on specific strategies that will create change." The study goes on to say that despite its assets, the internal community is more likely to focus on its weaknesses than its strengths. This "inferiority complex" sends mixed messages to the external world, encouraging the perception that Jacksonville has no narrative,

no identity, no real brand, and no saleable or marketable icons. Jacksonville, and to some degree the entire Northeast Florida region, is challenged to do a better job of recognizing and presenting the assets of the region, rather than focusing on the liabilities.

According to Next Generation Consulting, which publishes a list that rates cities based on assets that are important to 20 to 40 year-olds: earning, learning, vitality, cost of lifestyle, evening entertainment, and social capital, "the key is to identify and capitalize on the community's unique strengths in efforts to attract and retain the next generation

How we do business: Regulation, taxes, and incentives

A common refrain throughout the study was that it is difficult to do business in Florida and, to a lesser degree, the same was said about Northeast Florida. Rather than specific regulations being responsible, the committee was told that “failed processes and/or the absence of processes for decision making are at fault.” Too often, businesses are not able to get their doors opened quickly due to an anti-business regulatory attitude. These statements, made with regard to what happens in state government, are important at the regional level because the difficulty of doing business in Florida has a trickle down effect that negatively impacts local economic development efforts.

BUSINESS REGULATION. Though the perception persists that doing business in Florida is difficult, this does not always match studies by outside interests. Typically Florida ranks poorly or in the middle of the pack with regard to business climate, which includes regulation.

TOP 10 STATES FOR BUSINESS - 2010

Rank	State	¹ Business Costs Rank	² Labor Supply Rank	³ Regulatory Environment Rank	⁴ Economic Climate Rank	⁵ Growth Prospects Rank	⁶ Quality of Life Rank
1	Utah	8	5	6	1	20	18
2	Virginia	24	3	2	4	14	6
3	North Carolina	3	15	3	18	9	32
4	Colorado	33	1	15	6	6	9
5	Washington	28	2	5	11	4	29
6	Oregon	18	4	34	14	12	21
7	Texas	26	21	17	2	1	38
8	Georgia	31	7	1	30	7	35
9	Nebraska	6	23	28	12	40	14
10	Kansas	23	18	11	13	30	27
26	Florida	37	14	22	36	3	39

Source: Forbes Magazine, 2010 Best States for Business - Notes: 1) Index based on cost of labor, energy and taxes. 2) Measures educational attainment, net migration and projected population growth. 3) Measures regulatory and tort climate, incentives, government integrity, transportation and bond ratings. 4) Reflects job, income and gross state product growth as well as unemployment and presence of big companies. 5) Reflects projected job, income and gross state product growth as well as business openings/closings and venture capital investments. 6) Index of schools, health, crime, cost of living and poverty rates

workforce.” In fact, on its list of 20 cities (population 500,000 and above) where young professionals want to live and work, Jacksonville ranked 15th, eclipsing Los Angeles, San Diego and Houston.

The Jacksonville Metropolitan Statistical Area also ranks 49th in college degree density - 167 degreed persons per square mile. According to Richard Florida, “clusters of smart, highly educated people (human capital) are the key engine of economic growth and development.” Both businesses and other educated people are attracted to these hubs of intellectual activity.

• **U.S. Economic Freedom Index (2008), Pacific Research Institute:** All 50 states are ranked in five areas: fiscal policy, regulatory policy, judicial climate toward business, the size of government, and welfare spending. Florida ranks No. 45 in regulatory category and No. 28 overall.

• **Freedom in the 50 States: An Index of Personal and Economic Freedom (2009), Mercatus Center at George Mason University:** The categories measured were fiscal policy, regulatory policy, personal freedom and economic freedom. In the regulatory category, Florida ranked No. 19 and No. 22 overall.

• **The Best States for Business (2010), Forbes magazine:** The study examined business costs, labor policy, regulatory environment, economic climate, growth prospects and quality of life. In the regulatory ranking, Florida ranked No. 22 and No. 26 overall.

STATE AND COUNTY TAXES. Florida ranks fifth in the Tax Foundation’s State Business Tax 2006-2011 Climate Index. The Index compares the 50 states in five areas of taxation that impact business: corporate taxes; individual income taxes; sales taxes; unemployment insurance taxes; and taxes on property, including residential and commercial property. Competing states ranked as follows: Georgia (No. 25), and Alabama (No. 28), North Carolina (No. 41), and South Carolina (No. 24).

The taxes paid by businesses depend on

Taxes Administered by Florida Department of Revenue

- Communications Services
- Corporate Income
- Discretionary Sales Surtax (local option county taxes)
- Documentary Stamp
- Estate
- Fuels (multiple)
- Gross Receipts Tax on Utility Services
- Insurance Premium
- Motor Vehicle Warranty Fee (“Lemon Law Fee”)
- Pollutants
- Refunds
- Sales & Use
- Secondhand Dealers and Secondary Metals Recyclers
- Severance
- Solid Waste Taxes and Fees
- Unemployment

Source: The Florida Department of Revenue

the business structure, the types of goods or services sold, and the purpose for doing business. A considerable amount of discussion took place during the state legislative session about eliminating Florida’s corporate tax (5.5 percent) as a way to attract more business to the state. In the 2011 Legislative session, the corporate tax rate was not changed, but the existing \$5,000 exemption was raised to \$25,000, saving businesses on average \$1,100 in corporate income taxes. Currently, Nevada, Washington, and Wyoming are the only states in the nation without a corporate income tax. In some states, corporate income taxes are paid on a sliding scale relative to business income as well.

Business tax fees (occupational license fees) vary across Northeast Florida. Within the seven-county region, Clay and Nassau are the only two not requiring fees to operate a business. However, the municipalities in those counties do require fee payment. The fee amounts vary by county and type of business. Tangible property taxes are assessed by the county tax collector’s office as well. The depreciated value of business equipment is assessed at 1.5 percent. However, businesses with equipment valued at less than \$25,000 are exempt by Florida Statute.

Incentive Programs Managed at State Level

- Economic Development Transportation Fund
- Qualified Target Industry Tax Refund
- Qualified Defense Contractor Tax Refund
- Brownfield Bonus Program
- Quick Response Training
- Sales Tax Exemptions
- Tax Exemptions on Inventories and Personal Property
- No State Corporate Franchise Fee/Tax
- No State or Local Personal Income Tax/No State Property Tax
- Enterprise Zone Program (Applicable to certain portions of Duval and Putnam Counties only)

Special State Incentive Programs available only for High Economic Impact Projects

- High Impact Performance Incentive
- Capital Investment Tax Credit
- Florida Quick Action Closing Fund
- Florida Clean & Renewable Energy Technology Sector Programs

Incentive Programs Managed at the Local Level

- Tax Increment Economic Development Grant
- Targeted Economic Development Area Special Funds (Duval County only)
- Development Site Land Cost Write Down
- Free Trade Zone
- Industrial Development Revenue Bonds
- Recovery Zone Facility Bonds
- Recruiting, Screening, Placement Assistance

Source: Cornerstone Regional Development Partnership

STAGES OF BUSINESS DEVELOPMENT

SELF EMPLOYED single employee	Small-scale businesses including home-based business and sole proprietorships.
STAGE 1 2-9 employees	Partnerships, lifestyle businesses, and startups.
STAGE 2 10-99 employees	The company has proven products, survival is no longer a daily concern, operations are standardized, and leaders begin to delegate more.
STAGE 3 100-499 employees	Expansion is a hallmark at this stage as a company broadens its geographic reach, adds new products and pursues new markets.
STAGE 4 500+ employees	These organizations dominate their industry and the focus is maintaining and defending market position, controlling expenses, productivity, global penetration, and managing market niches.

Source: The Edward Lowe Foundation.

BUSINESS INCENTIVES. Refunds, exemptions, grants, credits, and other economic incentives are a means of encouraging business development. Communities willing to invest in business development projects via incentives send site selectors and businesses the message that this community is open for business. Still, incentives are not a primary business attractors; they act as a differentiating factor when the business case is relatively equal among communities. Consequently, incentives come into play at the end of the site selection process, rather than the beginning. In Northeast Florida the local incentives offered to businesses come from the funds allocated by availability within county and/or municipal economic development budgets.

The State of Florida also offers incentives to businesses that meet certain criteria, especially with regard to targeted industries, workforce training, and hiring specific classifications of workers (i.e. high-wage jobs or workers living in distressed communities). Generally speaking, Florida communities often fall short when it comes to offering incentives when compared to Texas, North Carolina, and other states' ability to offer generous cash grants and financial support for capital improvements.

CREATING NEW BUSINESSES AND JOBS LOCALLY

Northeast Florida has several options to leverage existing business assets to create jobs. Many of those opportunities require expansion within existing industries where the region already has experienced success in creating jobs. The projects that show the greatest promise also require the greatest investment to come to fruition. However, the return on investment may yield thousands of jobs.

Local job creation requires the recognition and support of businesses at every level from start-up (Stage 0-1) to mature businesses (Stage 4). Start-up companies may stay forever small or become the next great international business. Growing both strong and entrepreneurial businesses also serve as a way to attract new business into the regional community. Businesses want to be located in communities with successful peer companies. A community of successful entrepreneurs attracts those with the same goals and financiers as well.

Fast-growing firms (also known as second stage or gazelle firms) are well-positioned to hire new workers because they are in an expansion business phase. On the other hand, single person consultancies, small service agencies, "mom and pop" stores, and local restaurants also have a role in reducing unemployment, creating jobs, and hiring workers. The power of small businesses was illustrated by a resource speaker: "if every small business in the region hired one employee the unemployment rate would be zero."

Health and Biosciences Council 2007 Pending Recommendations

Education

- o increase medical residencies
- o enhance the University of Florida regional health science center in Jacksonville
- o develop a public education pipeline for bioscience

Health & Medical Care

- o improve access to care
- o reduce health disparities and inequities
- o promote wellness/health
- o advance health information technology

Research & Bioscience

- o establish a northeast Florida bioscience industry campus
- o establish a regional bioscience academic institute in Jacksonville
- o create a branded economic corridor from Jacksonville to Gainesville

GROWING EXISTING BUSINESSES AND INDUSTRIES

Northeast Florida opportunities for job growth were discussed in several sectors including manufacturing, tourism, logistics, health and biosciences, agriculture, and the military. Significant marketing efforts are in place to attract companies in the seven target industries: advanced manufacturing, aviation and aerospace, finance and insurance services, headquarters, information technology, life sciences, and logistics and distribution. The target industries also inform the types of college and career programs developed regionally to build a workforce trained for jobs in these areas.

Of all the target industries, three sectors have the greatest potential for creating a large number of jobs: logistics, health and biosciences, and the military.

- **JAXPORT EXPANSION:** The expansion of JAXPORT is dependent on state and federal agency approvals to dredge the Jacksonville channel, which includes an analysis of environmental impacts. Funding in excess of \$1 billion is needed to deepen the channel, repair Mile Point, upgrade the port's infrastructure, and improve access to rail and roads. Each of these projects is important to prepare JAXPORT to receive in port the large (double current capacity) container ships that will be travelling through the Panama Canal after it is widened in 2014. Because the port's expansion could create 75,000 jobs, it is a critical job creating opportunity for the region. At every partner county site visit the expansion of JAXPORT was said to be integral to future economic development. Funding from federal and state governments to expand JAXPORT is uncertain given that the Port of Miami has been approved to receive funding from the Florida Department of Transportation to upgrade its port in 2011. At a Jacksonville Regional Chamber Cornerstone forum in April 2011, Governor Rick Scott stated that Miami's port is ready for expansion while Jacksonville's port has not secured the permits needed for dredging.
- **HEALTH AND BIOSCIENCES CLUSTER:** Northeast Florida has abundant medical/health/life sciences resources including 20 hospitals and over 1,000 clinics, labs, and other medical offices regulated by the Florida Agency for Health Care Administration. While there is no medical school in the seven-county region, Jacksonville is a hub for medical education and provides a training ground for the University of Florida's medical school interns and residents.

In 2007, the Health and Biosciences Council of Northeast Florida at the University of North Florida was charged with implementing twelve recommendations (see chart p.13) to "enhance the individual and economic health of the community through improved medical care and bioscience growth, thus empowering the region to compete nationally and globally as a center of excellence in bioscience and medical care." If carried out, these recommendations will impact job creation, the region's intellectual infrastructure, and efforts to attract and retain a high quality workforce.

Building the partnerships and securing the funds needed to anchor the region's enviable medical/health/life sciences assets and institutions with a medical school or university research facility are long term projects that may not create jobs quickly.

- **MILITARY PRESENCE:** Over the next five years, Northeast Florida will lose military jobs due to the decommissioning of ships currently at Mayport. Expanded military operations at Mayport and the opportunity for home porting a nuclear carrier at Mayport could offset those losses and create net military job growth. Preparing Mayport for a nuclear carrier, which may occur in 2019, will also require dredging of the Jacksonville channel, but at the ocean end from the jetties inward toward the river basin. Because military spending for expansion projects depends on the operational needs of the Department of Defense, regional communities have no control to attract or incentivize these projects. Local leaders do have the power to build strong relationships with the military and create military friendly communities. Economic developers can also leverage the presence of the military. In their presentations, Cornerstone and their regional partners market the region's military personnel as source of skilled workers. Unlike other military communities, however, Northeast Florida has not fully realized its potential as a hub for defense contractors, despite extensive assets including three military installations in Northeast Florida and one in Southeast Georgia.

INDUSTRY/PROJECT	INVESTMENT NEEDED	EXISTING ASSETS	PROJECTED JOBS CREATED	ECONOMIC IMPACT
HEALTH AND BIOSCIENCES**	\$500 million	20 hospitals	30,000	\$7.6 billion annually
MILITARY	Maintain and cultivate relationships with military leadership locally and nationally.	3 military installations in Northeast Florida and 1 in nearby Kings Bay, Georgia	~2,000 – 5,200* (This growth in jobs will occur over approximately 14 years. Jobs at Mayport are expected to decrease from 2012-2016)	~\$4.5 billion annually
LOGISTICS	\$1.1 billion (JAXPORT Expansion)	2 deepwater ports, 3 interstates, plus many international and regional airports	75,000	\$3 - \$6 billion annually

Sources: Speaker presentations.

*Military personnel only.

**College of Medicine combined with a life sciences cluster

Findings

Job creation opportunities are inherent in other existing Northeast Florida industries as well, namely manufacturing and tourism. To date, less discussion has taken place on how to best develop these industries, however several opportunities were discussed over the course of the study.

- The First Coast Manufacturers Association (FCMA) was founded in part to make the region more aware of the sector’s economic impact and challenges to future growth. The sector creates high-wage, high-skill jobs and because it is the State of Florida’s principal goods exporting industry, manufacturing is a logistics related industry that has direct ties to JAXPORT in Northeast Florida. To grow, manufacturing businesses require capital investment; however incentives favor businesses that create large numbers of direct jobs. Manufacturers bring new dollars into the community (economic expansion) and create indirect, supply-chain jobs. At the State level, work is being done to remedy this disconnect by creating a Qualified Target Industry (QTI) tax refund based on capital investment rather than job creation and an equipment replacement tax exemption akin to the exemption for new equipment.
- In 2010, Cecil Field Commerce Center was the eighth licensed commercial spaceport in the United States and can be used for suborbital space tourism, travel, and cargo operations. This license affords the region’s education, training, business development, and marketing interests with an opportunity to refine their programs, strategies to attract business, small business focus areas, and efforts to attract talent.
- In 2015, St. Augustine will celebrate the 450th Anniversary of its founding – the “Super Bowl” of tourism according to a speaker in St. Johns County. The expected boon in tourism and associated festivities could have positive short-term regional economic impact with coordinated participation across the seven-county region. In the long-term this event will provide much needed external exposure to individuals and businesses unfamiliar with Northeast Florida.

Job creation opportunities are inherent in all of the target industries; however discussion on a specific course of action to best develop these industries has not taken place. In a diverse seven-county region, where the target industries are adjusted to fit the community, it follows that the three focus areas – logistics, health and biosciences, and military/defense may not be broad enough to fully utilize the region’s assets to create jobs. A salient point brought up by the study committee was the need for balance in job creation. A focus on one industry over another, could lead to a community of logistics workers and very little else, for example.

Small business development and support at all levels

Northeast Florida is home to over 157,000 business establishments according to data provided by the Edward Lowe Foundation. Of those businesses, the vast majority (98 percent) employ fewer than 100 people. Because of the higher proportion of small businesses, it is likely that a significant number of the new jobs created in the region will come from these smaller firms.

With jobs in short supply, many people have elected to start businesses. Many of these small business owners will be “lifestyle entrepreneurs” or self-employed people who have found a way to replace their income. These start-up businesses and Stage 1 firms require a broad support platform, including technical assistance, financing, training, and networking. Some of these firms will remain small businesses and others may grow to employ hundreds of people. No matter the case, preventing these businesses from failing is a prime consideration. Such firms are as important to a community’s economic diversity as fast-growing, innovative gazelle firms that will become tomorrow’s big tech company or dynamic new food service chain.

The Florida Small Business Development Center (FSBDC) Network is nationally accredited and recognized by the State of Florida as the principal

business assistance organization for small businesses in the state. The SBDC at the University of North Florida, part of the FSBDC Network, provides counseling, training and information to business start-ups and established businesses in Northeast Florida’s seven counties. By leveraging federal, state, city/county, and private-sector dollars, the SBDC at UNF is able to offer its services at little to no cost to the small business owner.

There are also at least 40 other organizations in Northeast Florida that support the success

of small businesses throughout Northeast Florida. These include chambers of commerce, state colleges, technical assistance programs, and networking groups that help business owners operate more effectively. Some of the organizations listed in the appendix have come together to form the Small Business Assistance Providers group, which shares information, exchanges ideas regarding small business issues, coordinates assistance activities, and advocates on behalf of their small business members and clients.

BUSINESS ESTABLISHMENTS IN NORTHEAST FLORIDA BASED ON DUNS REPORTING - 2008

	BAKER	CLAY	DUVAL	FLAGLER	NASSAU	PUTNAM	ST JOHNS	TOTALS
ESTABLISHMENTS 2008	1,775	16,405	94,628	10,272	7,219	6,221	21,266	157,786
SELF EMPLOYED (1)	37.9%	36.1%	29.6%	35.9%	35.8%	35.4%	35.0%	35.1%
STAGE 1 (2-9)	58.1%	58.9%	63.5%	60.3%	59.6%	59.1%	60.1%	59.94%
STAGE 2 (10-99)	3.7%	4.8%	6.5%	3.7%	4.4%	5.3%	4.7%	4.73%
STAGE 3 (100-499)	0.3%	0.2%	0.4%	0.1%	0.2%	0.2%	0.2%	0.23%
STAGE 4 (500+)	0.0%	0.01%	0.04%	0.0%	0.03%	0.0%	0.03%	0.02%

Source: The Edward Lowe Foundation.
Notes: **Self Employed** (1 employee): Small-scale businesses including home-based business and sole proprietorships. **Stage 1** (2-9 employees): Partnerships, lifestyle businesses, and startups. **Stage 2** (10-99 employees): The company has proven products, survival is no longer a daily concern, operations are standardized, and leaders begin to delegate more. **Stage 3** (100-499 employees): Expansion is a hallmark at this stage as a company broadens its geographic reach, adds new products and pursues new markets. **Stage 4** (500+ employees): These organizations dominate their industry and the focus is maintaining and defending market position, controlling expenses, productivity, global penetration, and managing market niches.

Small business development is not the primary focus of any traditional economic development organization in the region. The degree of focus on small business development as a job creator also varies from county to county. The Jacksonville Economic Development Commission had the most extensive list of resources and programs followed by Enterprise Flagler and the Nassau County Economic Development Board.

A THRIVING COMMUNITY OF FAST GROWING FIRMS. Second stage firms create jobs because they are at the beginning stages of expanded growth. The Kauffman Foundation study, *High-Growth Firms and the Future of the American Economy*, states that fast-growing gazelles (3 to 5 years old) make up less than 1 percent of all businesses, yet account for approximately 10 percent of net new jobs in any given year. Of the 157,000 firms in the seven-county region, 5 percent are at this growth stage, according to the Edward Lowe Foundation.

Venture capital is a type of private equity provided to early-stage, high-potential, growth companies in the interest of generating a return through an IPO (initial public offering) or the sale of the company.

Attracting and growing more of these businesses in Northeast Florida requires at least two considerations: more venture capital firms and an environment that encourages entrepreneurship. Creating this environment starts with building partnerships between the region's universities, venture capital, and private enterprise. Like-attracts-like; creating a strong entrepreneurial culture will attract entrepreneurs and capital.

Currently, there is one venture capital firm in the region. However, the region has several higher education institutions and due to existing geo-economic partnerships with the University of Florida, Florida State University, Florida A&M University, and the University of Central Florida might be considered as well.

As discussed earlier, formal partnerships between business, government, and education are a key component for creating a more competitive region. With this in mind, along with the reality of Northeast Florida's de facto super-region, which extends "north to Georgia, south to Orlando, and west to Tallahassee", a precedent exists for formalizing partnerships with other urban economic centers, including but not limited to Tallahassee, Gainesville, and Orlando, not only tapping into their higher education systems but venture capital networks as well.

Access to capital

Small and large business access to capital is limited due to the fallout from the national recession. Financial institutions are focused on their institutional survival in a time when bank failures are not unheard of in communities across the nation. Regulatory changes and greater prudence in lending practices mean that businesses will not be able to qualify for loans unless they have a strong cash position and are highly credit worthy. Traditionally, small business start-ups have relied on the owner's personal financial reserves and the generosity of family and friends to invest in new ventures, but with high unemployment and depletion of personal savings, this is less likely today.

Very small firms, which often rely on the credit worthiness of their owners, have few avenues. When Jacksonville was a banking and financial center in the 1980's and 1990's community banks were better situated (before 2007), and small business owners were more likely to work with a local banker who had the leeway to consider factors beyond the balance sheet. Today, small business owners' options are somewhat limited if securing bank financing is the goal. However, the Small Business Administration 7 (a) loan program is an option and many of the region's banks are actively engaged in lending through this vehicle. Borrowing against assets and collateral is another option for businesses as well. In

addition to the SBA, the region's small business organizations also include agencies that can assist business owners who are seeking financial assistance. The financial crisis has provided business owners with an opportunity to become more effective and efficient by examining their processes and capacities, according to one speaker. The resulting savings could very well improve the business' access to cash, which can be used for investment or collateral purposes.

RETAINING BUSINESSES AND JOBS

Approximately 100,000 firms in Northeast Florida employ two or more persons, according to the Edward Lowe Foundation. Efforts to keep these firms local and support to help them thrive are beneficial to the region. There are over 50 organizations in Northeast Florida that support business development efforts, and many work to retain local businesses as well. Retention efforts are also intrinsic to some of the state's incentive programs, particularly those geared toward target industries and workforce training. Still, the region's economic development organizations have limited capacity – funding and staff – to engage in wide ranging retention efforts.

Per the University of Minnesota, retention efforts employ both short and long term strategies for retaining businesses. In Northeast Florida, there are some indications that the region's communities are embracing the strategies suggested, including programs that create stronger, more competitive businesses and buy local initiatives that raise awareness about and increase patronage of local firms.

Business Retention Strategies

Short Term

Business Retention Efforts

- Demonstrate community support for local firms
- Help resolve immediate business concerns

Long Term

Business Retention Efforts

- Build community capacity to sustain business growth and development through creation of broad-based coalitions
- Increase the competitiveness of local firms
- Establish and implement a strategic plan for economic development

Source: University of Minnesota

Findings

Recognition and utilization of local businesses

Campaigns to purchase goods and services from local businesses have been discussed in Baker, St. Johns, and Duval Counties via the chambers of commerce. The only regional effort to date is being undertaken by the Jacksonville Regional Chamber of Commerce, which encourages chamber members to buy from one another. Such efforts are thought to bring attention to and build support for local businesses. According to the Baker County Chamber, “When you support local businesses, you are also supporting your local government, and the money you spend will most likely be used by that business again in our local economy and it just might find its

way back to you and your business.” The Amelia Island-Fernandina Beach-Yulee Chambers of Commerce also has a local buying initiative, the *Buy Nassau* campaign, which has been in effect since 2009.

In 2009, the State of Florida launched its *Backyard Economics* initiative to encourage spending within the state. The effort was spawned by a Florida Tax Watch report, which said that every \$100,000 spent via the internet with companies outside the state costs a Floridian his or her job. The program was rolled out through various economic development organizations in Florida, but is now defunct.

Training people for the jobs that are available

Though the unemployment rate is high in Northeast Florida and many people have been out of work for an extended period of time, there are job openings in the region. However, the jobs available do not always match the skills of those seeking employment. Jobs in high demand fields often require technical expertise, a postsecondary credential, or a college degree.

Addressing the skills gap in Northeast Florida is important for attracting businesses, as well as retaining business where losing an employer because workers do not have the needed skills can be damaging for the economy and the perception of the region.

WorkSource, the region’s publically funded workforce development agency, offers job seekers several tools to improve their skills and find work. The region’s state colleges and various non-profit organizations and for-profit institutions also offer job training and workforce readiness skills training to people who are unemployed and underemployed. WorkSource received federal stimulus funds and has provided training scholarships for over 2,200 displaced workers in the region, resulting in degrees or certifications in high demand occupations.

There are also Banner Centers in Northeast Florida that provide education in training in three of the region’s seven target industries, and 5 more in the adjacent areas. The centers ensure that there is a talent pipeline for the industries that are being recruited to Northeast Florida. Each of these centers is the only one of its kind in the State.

- **Aviation and Aerospace @ Florida State College at Jacksonville:** The Aerospace Resource Center provides training, certification, and support for the continuation and expansion of the aviation and space industries. The Center also engages in business incubation initiatives, skills identification, and credentialing.
- **Creative Industries @ University of North Florida:** The Center for Creative Industries supports the development of talent in a wide range of fields such as advertising, architecture, creating and promoting intellectual property, arts, film, video games, and multimedia design. Experts project 20,000 creative industries jobs will be added in Florida by 2018.
- **Financial and Professional Services @ University of North Florida:** The Center for Financial and Professional Services is a partnership of educational institutions, financial and banking industry partners, workforce agencies, and economic development organizations. The partners are committed to providing training to existing and future workers in the sector, which is expected to increase by five percent in the next eight years.

Benefits of Buying from Locally Owned companies

- Keeps local money in the local economy.
- Helps create and sustain a more vibrant local economy.
- Locally owned businesses are more likely to utilize local banks.
- Locally owned businesses are more likely to utilize locally owned services.
- Locally owned businesses help foster uniqueness and economic diversity in neighborhoods where they are located.
- Locally owned businesses are more likely to actively participate in local issues involving schools, taxes, development, roads, zoning, and other local issues.
- A thriving, locally owned and operated business environment prevents blight and brings character to Northeast Florida.

Source: Buy Local Jacksonville

WorkSource Region 8

Top Advertised Occupations WorkSource, March 2011	Online Ads
Registered Nurse	693
Web Developer	550
Retail Salesperson	550
Customer Service Representative	497
First-Line Supervisor/Manager of Retail Sales Force	491
Truck Driver, Heavy and Tractor-Trailer	462
Computer Systems Analyst	407
Physical Therapist	387
Sales Representative, Wholesale and Manufacturing, except Technical and Scientific Products	368
Occupational Therapist	317
Computer Support Specialist	282
Sales Representative, Services, All Other	270
Telemarketer	257
Executive Secretary and Administrative Assistant	256
Speech-Language Pathologist	237

Source: The Conference Board, Help Wanted OnLine,
prepared by the Florida Agency on Workforce Innovation,
Labor Market Statistics Center

IDENTIFICATION OF AND SUPPORT FOR SECOND STAGE, GROWTH COMPANIES

In 2008, according to the Edward Lowe Foundation's online database, 5 percent of businesses (7,463 firms) in Northeast Florida were second stage businesses, which employed 28 percent of the region's workers. According to data from the SSBD Initiative, the investment required to create new jobs at existing companies is significantly less than the investment required to recruit companies from other areas. In addition to the Chamber's economic gardening initiative, the region's second stage firms are also served by the region's extensive network of small business assistance, development, and networking organizations.

Support for the region's second stage companies is important for creating and retaining jobs. These firms have a history with the community and are more likely to remain local if provided with support to expand. Identifying these companies and providing needed technical assistance and resources is important for job creation and overall economic viability.

Economic Gardening is a successful strategy that has been adopted by the State of Florida

(GrowFL) and the Jacksonville Regional Chamber of Commerce (Second Stage Business Development Initiative - SSBD) to cultivate second stage businesses. According to the Chamber, the SSBD Initiative provides a balanced approach to economic development that fosters both economic gardening (growing our own) and economic hunting (recruiting businesses to our region).

This concept grew out of necessity in Littleton, Colorado after the town's largest employer laid off several thousand workers in 1987 during a statewide recession. The premise is that businesses can and should be cultivated locally, as opposed to relying on economic development policies that focus on relocating larger companies to an area.

Economic Gardening helped entrepreneurs in Littleton double the job base from 15,000 to 30,000 and triple retail sales taxes from \$6 million to \$21 million over a period of 20 years. At the same time, the population only grew 23 percent over those two decades. Littleton's project began with the idea that "economic gardening" was a better approach than "economic hunting." This means growing jobs

locally through entrepreneurial activity, rather than recruiting those jobs. Recruiting typically represents less than five percent of the jobs created in most local economies.

Basic Elements of Economic Gardening

1. Providing critical information needed by businesses to survive and thrive.
2. Developing and cultivating an infrastructure that goes beyond basic physical infrastructure to include quality of life, a culture that embraces growth and change, and access to intellectual resources, including qualified and talented employees.
3. Developing connections between businesses and the people and organizations that can help take them to the next level – business associations, universities, roundtable groups, service providers and more.

Future Trends

INTERNATIONAL BUSINESS AND GLOBALIZATION

As Northeast Florida prepares for future prosperity, job creation and economic competitiveness can be bolstered by the attention given to the localization of global trends.

Northeast Florida is a region with multiple ties to the global community due to the growth of international business activities and the growing presence of residents from other countries. Much of the region's international presence can be attributed to JAXPORT, Northeast Florida's international seaport. Goods from around the world pass through the port: primarily Puerto Rico and Brazil for exports and Colombia, Virgin Islands, and Canada for imports. Since the TraPac terminal came online the port has added eight new, primarily Asian, shipping lines that rank among the top 20 in the world.

Clay County is actively pursuing international business with 34 global companies located in the county at present. The Clay County Chamber also offers programs for businesses wanting to engage in international trade with its Global Network Series and International Trade Certificate program.

The region also has a growing number of residents who were born outside the United States. In Duval County for example, the international student body includes students representing 115 countries of origin. The languages spoken include Spanish, Burmese, Myanmar, Creole, Arabic, Tagalog, Vietnamese, Albanian, Serbo-Croatian, Chinese, and Russian.

One of the realities of globalization is a reduced emphasis on where people work and an added focus on the capacity and cost of the workforce. In a global marketplace, communities across the world are competing for the same jobs. At the same time, individuals who are well-educated, highly-skilled, and motivated can work where they choose depending on the job opportunities available.

SUSTAINABILITY – PEOPLE, PLANET, AND PROFIT

The goal of a sustainable economy is to meet the needs of today without compromising the future. Sustainable economic development is often described as a focus on the “triple bottom line” of people, planet, and profit.

People: Sustainable economic development, with its triple-bottom-line focus on people, means that employees, suppliers, and others in the community are treated fairly and that all individuals have the capacity to participate in the economic life of a community.

Planet: Protecting the environment is an important element of sustainable economies and a key quality-of-life factor that differentiates communities. Low unemployment rates in cities like Portland, Boston, San Jose, and Seattle are correlated with their focus on clean air and water along with the protection of natural spaces.

Profit: Sustainable regional economies work to circulate cash and wealth throughout the community. The net profit takes into account the external costs of doing business in the region – including costs not traditionally measured, such as environmental impacts. The target is to focus on the true economic benefits to the region of the economic strategies pursued.

According to a 2008 study, the Jacksonville metropolitan area ranks in the middle (compared to other U.S. cities) when it comes to sustainability. In a 2010 CEO study, 93 percent of the respondents agreed that sustainability was critical to the future success of their businesses, and 96 percent believe sustainability should be fully integrated into business strategy and operations.

While these efforts can be supported by government, successful sustainable economies are driven primarily by market forces. For regions that have embraced sustainability, job creation has often resulted from efforts to develop new processes that are less resource-intensive.

THE SCIENCE, TECHNOLOGY, ENGINEERING, AND MATH (STEM) PIPELINE

The National Science Foundation considers STEM fields the core technological underpinnings of an advanced society. Having a strong STEM workforce is an indicator of workforce quality and economic competitiveness at the local levels and beyond. Within a 100-mile radius of Jacksonville, there were just over 9,300 graduates in STEM programs at all degree levels from 2009 to 2010, according to the National Center for Education Statistics.

Scientists and engineers who conduct research and development are central to economic growth, as are technologically proficient workers capable of meeting the demands of a science-based, high-technology workplace. According to an international assessment of math and science knowledge, eighth-grade students in the United States rank eleventh in math and science in the world.

Interest in the STEM fields is low at all levels of education in the United States. At both the undergraduate and graduate level, the number of students who complete degrees in the STEM fields has decreased as much as 50 percent. Countries, states, and regions with the greatest capacity in science, technology, engineering, and math will drive technological and industrial innovation and lead in economic competitiveness.

INTERNATIONAL EDUCATIONAL SCORES

8th grader students average scores

Country	Rank
Singapore	1
Taiwan	2
South Korea	3
Japan	4
Hong Kong	5
Hungary	6
United Kingdom	7
Czech Republic	8
Russia	9
Slovenia	10
United States	11

Source: 2007 TIMSS International Math and Science Study

NEXT JOBS?

Based on current economic conditions the Agency for Workforce Innovation anticipates job growth by industry and occupation for the period 2010-2018. The top three industries for new job gains are Ambulatory Health Care Services; Professional, Scientific, and Technical Services; and Administrative and Support Services. Over 3,200 jobs per year will be created in these industries within the Metropolitan Statistical Area.

The occupations predicted to gain the most jobs through 2018 are Retail Salespersons, Customer Service Representatives, Registered Nurses, Food Preparation Workers, and General Office Clerks. Among these top five industries, 1,725 new jobs will open annually. The fastest growing occupations are decidedly different with regard to the level of education and training required. Among the top five are Network Systems and Data Communications Analysts, Home Health Aides, Physician Assistants, Electrician's Helpers, and Cost Estimators, which will gain 274 jobs per year.

On the one hand, job growth is imminent, but many of the occupations listed will not provide the economic opportunity that highly skilled workers are seeking. Among the top 10 occupations "gaining the most jobs", none requires a bachelor's degree. So, while there is a need to increase the number of people with college degrees to foster greater economic competitiveness, there may not be enough job opportunities based on current realities to attract or retain such talent in Northeast Florida. Clusters of talent, as mentioned earlier, make a region more attractive to relocating and expanding businesses.

Among the fastest growing occupations in the region, there is a greater demand for skilled workers. Seven of the top ten occupations require a postsecondary credential, with two requiring bachelor's degrees. While the growth rate for the top 10 ranges from 4 – 6 percent per year, the actual number of jobs created annually is relatively small.

Despite predictions about the region's next jobs, there are no absolutes. Future job growth will depend on the shape of the economic recovery in Northeast Florida as determined by individuals and public and private stakeholders. As a consequence of the economic turmoil resulting from the Great Recession. Northeast Florida has an opportunity to determine a new path for creating the region's next jobs.

OCCUPATIONS GAINING THE MOST NEW JOBS 2010-2018

Jacksonville Metropolitan Statistical Area

Rank	Title	Average Annual Openings due to Growth	Annual Percent Change	**Education Required
1	Retail Salesperson	445	2.35	High School Diploma or GED
2	Customer Service Representative	401	2.25	Post Secondary Adult Vocational Certificate
3	Registered Nurse	354	2.83	Associate's Degree
4	Food Preparation & Serving Worker, including Fast Food	298	2.55	Less than High School diploma
5	Office Clerk, General	227	1.79	High School Diploma or GED
6	Truck Driver, Heavy and Tractor-Trailer	208	2.19	Post Secondary Adult Vocational Certificate
7	Stock Clerk and Order Filler	208	1.59	High School Diploma or GED
8	Bookkeeping, Accounting, and Auditing Clerks	186	1.94	Associate's Degree
9	Nursing Aide, Orderly and Attendant	185	2.70	Post Secondary Adult Vocational Certificate
10	Secretary, except Legal, Medical and Executive	182	1.60	Post Secondary Adult Vocational Certificate

Source: Florida Agency for Workforce Innovation

FASTEST GROWING OCCUPATIONS

Jacksonville Metropolitan Statistical Area

Rank	Title	Average Annual Openings due to Growth	Annual Percent Change	**Education Required
1	Network Systems and Data Communications Analyst	85	5.80	Post Secondary Adult Vocational Certificate
2	Home Health Aide	77	5.71	Post Secondary Adult Vocational Certificate
3	Physician's Assistant	16	4.77	Bachelor's Degree
4	Electrician's Helper	50	4.60	Less than High School diploma
5	Cost Estimator	46	4.60	Associate's Degree
6	Plumber's, Pipefitter's and Steamfitter's Helper	19	4.56	Less than a High School diploma
7	Personal Financial Advisor	55	4.16	Bachelor's Degree
8	Construction Laborer	159	4.12	Less than a High School diploma
9	Mobile Heavy Equipment Mechanic, except Engines	18	4.02	Post Secondary Adult Vocational Certificate
10	Pharmacy Technician	63	3.97	Post Secondary Adult Vocational Certificate

Source: Florida Agency for Workforce Innovation

Conclusions

Conclusions express the value judgments of the committee based on the findings.

1. Duval County is the economic driver for job creation in the Northeast Florida region, leveraging and contributing to the assets within Baker, Clay, Duval, Flagler, Nassau, Putnam and St. Johns Counties. The region faces super-regional competition within the State of Florida including Tampa-Orlando and Palm Beach-Ft. Lauderdale-Miami as well as other growing regions anchored by Savannah, GA, Charleston, SC, and Nashville, TN among others. Maximizing and increasing the economic potential of the region is critical to the economic health of the individual counties.
2. The region's economic development issues are not constrained by geographic or political boundaries, and economic recovery will require a consistent shared vision and proactive leaders who think regionally when developing and implementing public policy.
3. Efforts to expand the region's target industry sectors will struggle without public and/or private investment, as will efforts to attract and retain a highly qualified workforce who demand a high quality of life, which generally requires ongoing and strategic investments.
4. Neither the Northeast Florida region nor its counties have a recognizable brand identity, which is a promise of positive experiences that communities make to consumers (i.e. residents, businesses, and tourists). Branding goes beyond slogans and logos and includes visioning ("Who are we?" and "What do we want to become?"), setting goals, and executing a plan. The absence of such efforts makes it difficult for economic development interests to define the conversation about Northeast Florida and its seven counties locally, nationally, and beyond. As a result, negative perceptions regarding community capacity, culture, diversity, tolerance, and quality of life persist.
5. Improving the educational attainment of the workforce is vital to providing Northeast Florida with a competitive advantage in economic development. The region falls short in the percentage of adults with bachelor's degrees (with a target of between 35-40 percent of workers), as well as highly-skilled and trained workers (needing at least 50 percent of workers). Efforts to raise the region's percentage of educated and skilled workers include the following:
 - Attracting educated workers from other communities and retaining the region's educated young people, both of which are influenced by the availability of high wage jobs and the region's quality of life.
 - Educating the region's students from kindergarten through college with particular emphasis on improving high school graduation rates and the rates at which those graduates are prepared for success at work and completion of postsecondary education programs.
 - Leveraging and replicating the successes that already exist in the region's public schools, including career academies, college preparatory schools, and specialty magnet schools.
 - Recognizing the overall success of the region's schools where six out of seven districts have consistently earned grades of "B" or better from the State of Florida.
6. Deepening the Jacksonville channel at JAXPORT is critical to maximizing the region's capacity as a logistics and manufacturing hub and is a keystone to current regional economic development planning. Without securing the necessary regulatory approvals and the funding to deepen the channel and modernize port facilities and surrounding infrastructure, JAXPORT will not be able to compete as a first-tier port after the Panama Canal widening is complete in 2014.

7. Northeast Florida is well positioned to continue benefiting from the stature of its medical and life sciences sector due to the region's high quality and abundant medical facilities. Leveraging the region's current medical and life sciences assets (growing medical tourism industry, multiple Centers of Excellence, etc.) and attracting more of the same would be improved by focusing on the following areas:
 - The presence of a medical school and/or research university in Jacksonville.
 - Regional branding and marketing efforts akin to Orlando's Medical City at Lake Nona that announces to the world that Jacksonville and all of Northeast Florida is a medical and life sciences hub.
 - Developing the largely untapped partnership potential between hospitals, clinics, health care providers, and life science-focused organizations in the region.
 - Growing and attracting small businesses which focus on medical technology and life sciences.
8. Leveraging the region's military presence and its personnel (active duty and veterans) is important given that expansion of military operations in Northeast Florida is outside local and regional control. Having multiple military installations provides economic developers with leverage to attract more defense contractors to the area, while the capacity of the region's workforce is improved by the skilled and men and women who leave the service and decide to live and work in Northeast Florida. Economic development strategies for the region can hope for, but not rely on, future military expansion.
9. Northeast Florida has numerous small business development and support agencies that work with business owners at all levels from start-ups to fast-growing second stage companies, but the region lacks specific strategies and financial resources to expand and elevate the small business base, including attracting successful entrepreneurs to the region and leveraging resources to help existing small businesses expand and grow into larger businesses.
10. Reducing business development costs is an important factor for creating a more pro-business region, which includes 27 municipalities. Job creation opportunities, new business development, and increased economic competitiveness are stalled by the lack of streamlined permitting and regulatory review processes that enable businesses to open quickly and inexpensively. Anecdotal evidence was given regarding lengthy processes, illogical interpretations of existing rules, and an attitude among regulators to prevent rather than approve projects in some but not all of the region's communities.
11. Northeast Florida's multiple land, water and air habitats, including the river, ocean, wetlands, parks and other recreational facilities, are important assets for attracting and retaining a talented workforce and innovative businesses. Regional economic development strategies can be enhanced through a consistent focus on building a sustainable economy through attention to triple-bottom-line principles.

Recommendations

Recommendations are the committee's specific suggestions for change, based on the findings and conclusions.

To attract, create, and retain jobs in Northeast Florida, regional action is required in five primary areas: creating jobs in key regional growth industries, building and maintaining an educated and skilled workforce, encouraging the growth of small business, improving the region's marketing elements, and securing regional leadership for sustainable economic growth.

Creating jobs in key regional growth industries

The primary immediate opportunities for substantial job creation in the region are in the areas of port logistics, health and medical sciences, and associated industries, aviation/aerospace and defense contracting, and financial services.

1. Expansion of shipping business at JAXPORT represents the single largest job creation opportunity in Northeast Florida over the next several years. Its maximum potential can only be realized if it secures the regulatory approval and funding to (a) repair the Mile Point and (b) deepen the Jacksonville Channel to accommodate the larger ships that will utilize the Panama Canal once its reconstruction project is completed in 2014. Even if JAXPORT does not obtain the funding to become post-Panamax ready, it still has the potential to be a significant job-creation driver by capturing a larger percentage of the current international shipping business whose destination is the East Coast of the United States.
 - The City of Jacksonville and its regional economic partners should exhaust all available options (including Federal, State, and local government funding, as well as private investment) to pay for necessary repairs to the Mile Point and the deepening of the Jacksonville Channel to accommodate larger ships that will make their way through the reconstructed Panama Canal.
 - JAXPORT, Cornerstone, Jacksonville Transit Authority, and the Northeast Florida Transportation Planning Organization should move forward as soon as possible to complete Phase 2 of JAXPORT's strategic plan to improve port facilities and the surrounding rail and road infrastructure. This should include a specific marketing strategy for aggressively pursuing existing shipping business that currently is captured by other Ports on the East Coast.
2. The Health and Bioscience Council should expand its mission to serve as the lead regional representative and advocate for the medical and life sciences in Northeast Florida, as part of vigorously encouraging growth in the sector. The Council would assume responsibility for the following:
 - building coalitions;
 - expanding graduate medical education;
 - branding the sector;
 - attracting entrepreneurs in the sector;
 - securing a medical school;
 - encouraging medical research; and
 - obtaining resources and partners to carry out the tasks outlined.
3. The Cornerstone Regional Partnership should aggressively attract aviation/aerospace and defense contractors as the primary means of leveraging the region's military assets, which includes multiple military installations, skilled veterans, and commercial space available at Cecil Field (a former military installation).
4. The Northeast Florida Regional Planning Council should identify and prioritize the region's pressing public investment needs based on a cost-benefit analysis that uses the triple-bottom-line (people, planet, and profit) to determine which projects provide the best return on investment for public and private investors. The results of the analysis should be provided to the general public and the region's elected officials. Many of the projects that could be considered, including downtown development in Jacksonville, better regional public transportation, improved logistics infrastructure, and protecting the St. Johns River are quality-of-community concerns that affect how the region is perceived by residents as well as people and businesses considering a move to Northeast Florida.
5. The Cornerstone Regional Partnership and the Northeast Florida Regional Council should present the outcomes of its sub-cluster, target industry study to WorkSource, the region's higher education institutions, and Northeast Florida's public school districts so adjustments can be made to their education and training programs to strengthen the workforce pipeline. At the same time Cornerstone should use the results to better market the region and advocate for local business creation and retention in the target industries and the sub-clusters to be identified. Cornerstone should also develop a set of metrics that provide the public with information on the status of the efforts to improve business recruitment efforts as result of the study.

Building and maintaining an educated and skilled workforce

The talent pipeline begins in the region's schools and continues with efforts to retain talented local workers as well as attracting talented workers from around the world.

6. To develop an educated and skilled workforce, the region's public schools must provide students opportunities to pursue one or more of several workforce options, including college, careers, the trades, and the military. Unacceptably high remediation rates for public high school graduates require aggressive tactics by the region's state colleges and school districts to identify and address academic deficiencies prior to graduation through expansion of programs such as the Florida State College at Jacksonville/Duval County Public School partnership. To build better connections between businesses and public schools, school districts and local Chambers of Commerce should pursue aggressively business-school partnerships based on best practices that meet the needs of students and achieve the goals of their business partners both through in-school partnerships and expansion of the career academies.
7. Jacksonville, particularly downtown, should become a target destination for serious, high-potential entrepreneurs to attract corporate headquarters, venture capital, and talent to the region, plus develop thriving small businesses and leverage business opportunities in the target industries. The Cornerstone Regional Partnership should develop a targeted program to recruit entrepreneurs while the Jacksonville Economic Development Commission should advocate for incentives to promote the resulting business start-ups.

Encouraging the growth of small businesses

Improving access to support for small business development and expansion holds the potential for creating more jobs and business owners.

8. As the state's designated "principal business assistance organization for small businesses," the Small Business Development Center at the University of North Florida should take the lead in bringing the region's small business development, education, and networking organizations together to implement a strategic plan to better assist start-up businesses, attract entrepreneurs and venture capital to the region, help small businesses expand their geographic reach, and support the growth of second stage firms. Activities that support these efforts include the following:
 - Continue to develop and expand the centralized website of small business resources (www.jaxsmallbiz.org) to include resources in the other counties in the region.
 - Develop, support, and promote buy local campaigns.
 - Advocate for the expansion of the region's economic gardening efforts that focus on growing businesses already in the community.
 - Evaluate the need for business incubators that focus on specific industries with the support of the public and private sectors.
 - Work in partnership with the region's chambers of commerce, economic development organizations, and the Northeast Florida Regional Council to inform small business owners about the availability of capital via commercial lenders, venture capital, and government programs (federal, state, and local) through regularly scheduled forums and other forms of outreach.
 - Evaluate the need and potential to create a viable microloan program in the region.
 - Advocate for incentives to support small businesses in the target industries as well as those that help to revitalize neighborhoods (e.g., create jobs, increase commercial viability, provide critical services).
 - Seek funding and other resources within the region and beyond to leverage current investment in existing programs that deliver economic impact and return on investment.

Recommendations

Improving the region's marketing elements

An outsider's view of Northeast Florida often begins with Jacksonville and its central city. A good first impression of the City of Jacksonville along with having strong economic development partners can have long term positive implications.

9. Because Jacksonville is the economic hub of the region, having a robust downtown will improve the region's image, marketability, and sense of place. The Mayor and City Council of Jacksonville should support the downtown re-development and revitalization efforts that are being undertaken by the Jacksonville Regional Chamber of Commerce, Jacksonville Civic Council, Downtown Vision, the Jacksonville Transportation Authority and others who are working to make downtown a vibrant, livable, sustainable, and easy to navigate central metropolitan community for businesses, tourists, and the residents who live in Northeast Florida.
10. The region's economic development and political leaders should henceforth uniformly consider and refer to the University of Florida as this region's research university and an integral part of Northeast Florida. The University is geographically adjacent to counties within the region, and the assets that the University brings to Northeast Florida are too vast to ignore. Meanwhile the University of North Florida and other regional higher education institutions should push to initiate or expand their own research capabilities.

Securing regional leadership for sustained economic growth

A regional leadership focus on issues that stymie growth can improve Northeast Florida's economic competitiveness.

11. A coalition of the region's public sector leaders in all 27 municipalities, led by the Northeast Florida Regional Council, should work to identify, streamline, and standardize those regulatory and permitting processes that make it difficult or costly to start, operate, or expand a business in Northeast Florida. It is also imperative that these regional leaders balance the absolute necessity of reform with protecting consumers and the environment. The coalition should also establish guidelines for the highest and best use of incentive dollars to attract high-wage, target industry jobs as well as the consider other options for public investment to attract jobs to the region. A summary report of the goals and outcomes of the summit should be prepared and presented to the participants and the region.
12. The Regional Council of Northeast Florida and the Cornerstone Regional Partnership should jointly produce an annual regional economic summit where leaders representing government, business, human services, and environmental issues review progress in implementing regional economic plans, identifying regional annual economic goals, and creating a regional legislative agenda.
13. Economic development organizations, regional higher education institutions, local governments, and the business community should establish the "Northeast Florida Advanced Technology Business Accelerator" to attract established entrepreneurs and venture capital to the region, create jobs in STEM fields (science, technology, engineering, and math), and increase the region's applied research capabilities. The accelerator's founders should also invite participation from the extended economic development region, including the University of Florida, Florida State University, and Florida A&M University to facilitate knowledge transfer.

Small Business Assistance Organizations in Northeast Florida

- Amelia - Fernandina Beach - Yulee Chamber of Commerce
- Baker County Chamber of Commerce
- Beaver Street Enterprise Center
- BETA-1, Business & Emerging Technology Accelerator
- Better Business Bureau of Northeast Florida
- Center for Business Excellence
- Clay County Chamber of Commerce
- E3 Business Group, Inc.
- Enterprise Flagler
- Essential Capital (Formerly JEDCO)
- European American Business Club
- First Coast African-American Chamber of Commerce
- First Coast Hispanic Chamber of Commerce
- Flagler County Chamber of Commerce
- Flagler Small Business Incubator Program
- Florida Business Development Corporation
- Florida Export Directory
- Florida First Capital Finance Corporation (FFCFC)
- Florida State College Small and Emerging Business Training & Development Program
- Greater Nassau County Chamber of Commerce
- Jacksonville Asian American Alliance
- Jacksonville Entrepreneurship Center
- Jacksonville Regional Chamber of Commerce Small Business Center
- Jacksonville Women's Business Center
- Indo-US Chamber
- Nassau County Economic Development Board
- National Association of Minority Contractors, North Florida Chapter
- Procurement Technical Assistance Center (PTAC)
- Puerto Rico Chamber of Commerce of Northeast Florida
- SBDC at Daytona State College
- SCORE
- Small Business Resource Network
- Small Business Workshops at the Chamber's Small Business Center
- Small Business Workshops at the Small Business Development Center at UNF
- Small Business Development Center (SBDC) at University of North Florida (UNF)
- St. Johns County Chamber of Commerce
- U.S. Small Business Administration
- UNF Small Business Blog
- Women Business Owners of North Florida
- WorkSource

Note: This list is not all inclusive. Other small business resources may be available in the community in addition to those listed above.

Reference Materials & Additional Readings

Creative Class Exchange

www.creativeclass.com

Economic Gardening: Next Generation Applications for a Balanced Portfolio Approach to Economic Growth

Small Business Administration

http://archive.sba.gov/advo/research/sbe_06_ch06.pdf

Economic Strength Rankings – 2010

Policom Corporation, William Fruth

<http://www.policom.com/PDFs/EconomicStrength2010.pdf>

Enterprising States Creating Jobs, Economic Development and Prosperity in Challenging Times

U.S. Chamber of Commerce and the National Chamber Foundation

<http://ncf.uschamber.com/wp-content/uploads/final-report-Enterprising-States-email.pdf>

Evaluating Local Job Creation

Journal of the American Planning Association, Daniel Felsenstein and Joseph Persky

<http://pluto.huji.ac.il/~msdfels/pdf/Evaluating%20Local%20Job%20Creation.pdf>

The Florida & Metro Forecast March 2010

Institute for Economic Competitiveness, College of Business Administration, University of Central Florida

http://issuu.com/ucfbusiness/docs/flforecast_mar2010

The Florida Scorecard

Florida Chamber of Commerce

<http://www.fldashboard.com/>

The Little Black Book of Economic Development

Don Allen Holbrook

The Role of Large and Small Businesses in Economic Development

Federal Reserve Bank, Kelly Edmiston

http://www.secondstagebusinessdevelopment.com/pdf/role_of_small_and_large_business_in_economic_development.pdf

Understanding Your Community's Economy

Kansas State University

<http://www.ksre.ksu.edu/library/agec2/L775.pdf>

Uneven Pain: Unemployment by metropolitan area and race

Economic Policy Institute, Algernon Austin

http://epi.3cdn.net/91deae2086a6f00e2a_afm6bnshh.pdf

Resource Speakers

Parvez Ahmed, Associate Professor of Finance Coggin College of Business University of North

Danita Andrews, VP of Economic Development, Clay County Chamber of Commerce

Ron Avery, Chairman of the Ronco Group and past Chairman of the First Coast Manufacturers

Ron Barton, Executive Director, Jacksonville Economic Development Commission

Aaron A. Bowman, USN (Ret.), former Commanding Officer, Naval Station Mayport

Yank Coble, Distinguished Professor and Director of the Center for Global Health and Medical Diplomacy, University of North Florida, Clinical Professor of Medicine, University of Florida

Lad Daniels, President of the First Coast Manufacturers Association

Bruce Ferguson, President/CEO of WorkSource

Cathy Hagan, Area Director at the Small Business Development Center at the University of North Florida

John Haley, Senior Vice President of Business Development for Cornerstone

Charles Hall, President of Florida Gateway College

Adam Hollingsworth, Governor Rick Scott's Transition Team/Chief of Staff to Mayor John Peyton

Joseph Joyner, St. Johns County School District

Peter Kantor, Senior Vice President, SunTrust Bank

Chris Kauffmann, Interim Executive Director, JAXPORT

Brent Lemond, Vice President of Instructional Services, First Coast Technical College

Erika Lorenz Alba, The Fiorentino Group, Principal and Managing Director Multi-State Legislative and Regulatory Practice

David Lusby, Vice President of Commercial Land Sales, Palm Coast Holdings

Jerry Mallot, President of the Cornerstone Regional Development Partnership and Executive Vice President of the Jacksonville Regional Chamber of Commerce

Paul Mason, Professor of Economics, University of North Florida and founder of the Local Economic Indicators Project (LEIP)

Alex McCoy, Vice-President, Economic Development, Putnam County Chamber of Commerce

Bridget Merrill, Vice President for Target Programs, Enterprise Florida, Inc.

Ed Pratt-Dannals, Superintendent Duval County Public Schools

Ed Preston, Director of Planning and Zoning for Baker County

Greg Rawls, Executive Director, Enterprise Flagler

Darryl Register, Executive Director, Baker County Chamber of Commerce

Steve Rieck, Executive Director, Nassau County Economic Development Board

Carlton Robinson, Director of the First Coast African American Chamber

Al Rossiter, President of Springboard Capital LLC

John L. Ruis, Superintendent Nassau County School District

Peter Rummell, Florida Council of 100

Nick Sacia, Executive Director, St. Johns County Chamber of Commerce Economic Development Council

Ed Swift, Director of Operations for St. Augustine/Savannah, Historic Tours of America

Brian Teeple, CEO, Northeast Florida Regional Council

Brad Thoburn, Director of Strategic Planning and Research, JTA

Tom Townsend, Superintendent Putnam County Schools

Steve Wallace, President of Florida State College at Jacksonville

Cleve Warren, President/Chief Executive Officer at Essential Capital

Marty Wilson, VP of Competitiveness Programs and Policies, Enterprise Florida, Inc.

Ben Wortham, Superintendent, Clay County Schools

About JCCI

Jacksonville Community Council Inc. (JCCI) was created in 1975 with the goal of improving the quality of life in Jacksonville through informed citizen participation in public affairs.

JCCI is a nonprofit, nonpartisan, broad-based civic organization. It involves citizens in community issues through open dialogue, impartial research, consensus building and leadership development to improve the quality of life and build a better community in Northeast Florida and beyond.

JCCI has been called Jacksonville's "citizen think-and-do-tank." This is the place where community-minded people get together to explore issues of community importance, identify problems, discover solutions, and advocate for positive change.

JCCI receives funding from United Way of Northeast Florida, the City of Jacksonville, grants, corporations, and individual members.

All are welcome to participate! Every voice is needed and every viewpoint matters. For more information or to sign up for your annual JCCI Membership, visit community.jcci.org/join.

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Previous JCCI Studies

Year	Study	Chair	Year	Study	Chair
1977	Local Government Finance	Robert Davis	1993	Public Education: The Cost of Quality	Royce Lyles
1977	Housing	Thomas Carpenter	1994	Reducing Violence in Jacksonville Schools	Dale Clifford
1977	Public Education (K-12)	Robert W. Schellenberg			
1978	Public Authorities	Howard Greenstein	1994	Jacksonville Public Services: Meeting Neighborhood Needs	Michael Korn
1978	Strengthening the Family	Jacquelyn Bates			
1979	Citizen Participation in the Schools	Susan Black	1995	Teenage Single Parents and their Families	Afesa Adams
1979	Youth Unemployment	Roy G. Green			
1979	Theatre Jacksonville	Richard Bizot	1995	JAXPORT: Improvement and Expansion	Jim Ade
1979	Civil Service	Max K. Morris			
1979	Planning in Local Government	I. M. Sulzbacher	1996	Creating a Community Agenda: Indicators for Health & Human Services	Bruce Demps
1980	Capital Improvements for Recreation	Ted Pappas			
1980	But Not In My Neighborhood	Pamela Y. Paul	1996	Leadership: Meeting Community Needs	Bill Brinton
1980	The Energy Efficient City	Roderick M. Nicol			
1981	Coordination of Human Services	Pat Hannan	1997	Improving Public Dialogue	Jim Crooks
1981	Higher Education	R. P. T. Young	1997	Transportation for the Disadvantaged	Cathy Winterfield
1982	Disaster Preparedness	Walter Williams Jr.	1997	Children with Special Needs	Virginia Borrok
1982	Teenage Pregnancy	Mari Terbrueggen	1998	The Role of Nonprofit Organizations	Sherry Magill
1982	Downtown Derelicts	Earle Traynham	1998	Incentives for Economic Development	Henry Thomas
1983	Mass Transit	David Hastings	1999	Improving Adult Literacy	Edythe Abdullah
1983	Indigent Health Care	Linda McClintock	1999	Arts, Recreation and Culture in Jacksonville	Ed Hearle
1984	Jacksonville's Jail	Eleanor Gay			
1984	Growth Management	Curtis L. McCray	2000	Affordable Housing	Bill Bishop
1985	Visual Pollution	Doug Milne	2000	Improving Regional Cooperation	Jim Rinaman
1985	Minority Business	Jack Gaillard	2001	Services for Ex-Offenders	Dana Ferrell Birchfield
1986	Private Delivery of Public Services	George Fisher	2001	Growth Management Revisited	Allan T. Geiger
1986	Mental Health and Drug Abuse Services for Children and Youth	Flo Nell Ozell	2002	Making Jacksonville a Clean City	Brenna Durden
1987	Child Day-Care Services	George W. Corrick	2002	Beyond the Talk: Improving Race Relations	Bruce Barcelo & Brian Davis
1987	Infrastructure	Joan Carver			
1988	Local Election Process	Jim Rinaman	2003	Neighborhoods at the Tipping Point	Randy Evans
1988	School Dropout Prevention	Gene Parks	2003	Public Education Reform: Assessing Progress	J.F. Bryan IV
1989	Reducing the Garbage Burden	Jack F. Milne & James L. White III	2004	Town & Gown: Building Successful University-Community Collaborations	Audrey McKibbin-Moran
1989	Independent Living for the Elderly	Roseanne Hartwell			
1990	Future Workforce Needs	Yank D. Coble Jr.	2004	Public Education Reform: Eliminating the Achievement Gap	Bill Mason
1990	Philanthropy in Jacksonville	Juliette Mason			
1991	Adequate Water Supply	Russell B. Newton Jr.	2005	River Dance: Putting the River in River City	Ted Pappas
1991	Positive Development of Jacksonville's Children	Henry H. Tip Graham			
1992	Long-Term Financial Health of the City of Jacksonville	Mary Alice Phelan	2006	Attracting and Retaining Talent: People and Jobs for the 21st Century	Adrienne Conrad
1992	Young Black Males	Chester A. Aikens & William E. Scheu	2007	Air Quality	A. Quinton White, Jr.
			2008	Infant Mortality	Howard Korman
1993	Planning for Northeast Floridas Uncertain Military Future	David L. Williams	2009	Our Money, Our City: Financing Jacksonville's Future	J.F. Bryan IV

Community Works, works!

In 2009, **Community Works**, the consulting arm of JCCI, was introduced as a focused approach to serving communities that need assistance in developing a neutral convener role, engaging people in meaningful change efforts, and/or measuring progress towards a shared community vision.

The strength of **Community Works** is in building capacity in communities to create positive change. We emphasize diverse participation, shared interaction, data driven decision making, and consensus building. Learn more about **Community Works** at www.communityworks.us.com.



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