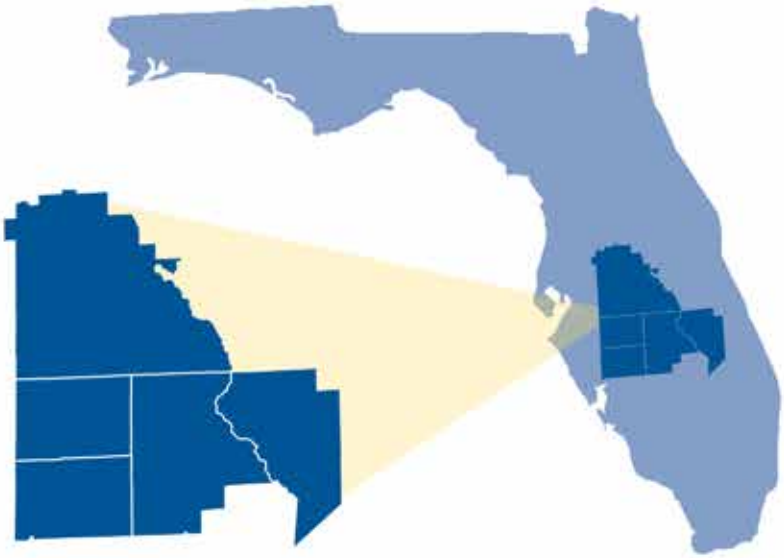
Comprehensive Economic Development Strategy

2012

Central Florida
Regional Planning Council

Economic Development District VII

Serving DeSoto, Hardee, Highlands,
Okeechobee and Polk Counties



As amended in 2015

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Comprehensive Economic Development Strategy 2012

For Region VII
Central Florida Economic Development District
Desoto, Hardee, Highlands, Okeechobee and Polk Counties

United States Department of Commerce

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INTRODUCTION

A Comprehensive Economic Development Strategy (CEDS) is an ongoing planning process that requires participation and input from both the public and private sectors, along with the communities of a region. Whenever possible, the Committee should represent the major interests of the community. The CEDS is designed to guide economic growth by fostering a more stable and diversified economy, to assist in the creation of jobs, and thereby improve the quality of life in Desoto, Hardee, Highlands, Okeechobee, and Polk counties. The CEDS and the CEDS Committee also enable a process to coordinate the efforts of individuals, organizations, local governments, and private industry in the area of economic development. The Central Florida Regional Planning Council was designated as an Economic Development District (EDD) by the Economic Development Administration (EDA) in 1976. The functions of the EDD include, but are not limited to preparing and maintaining a CEDS, assisting in the implementation strategies identified in the CEDS, and providing technical assistance to Economic Development Organizations throughout the region.

Unlike many rural areas across the country, the Central Florida Economic Development District's (CFEDD) five-county area of DeSoto, Hardee, Highlands, Okeechobee, and Polk counties (referred to as the "Region") is still expecting population growth in the coming years. Wages and income are not keeping pace with statewide and national trends, however. Unemployment is high, and educational attainment is overall lower than statewide and national averages.

The region is surrounded by fast-growing metropolitan areas on the east and west coasts of Florida and the Orlando metro area to the north. Although the region is a mix of urban and transitioning suburban to the north and rural transitioning to a new town mix to the south, there are still vast areas of agricultural and vacant land in the region.

The region has a number of assets and strengths to leverage in terms of enhancing economic conditions. There are economic opportunities in a number of industries, some of which are opportunity clusters for the future. This region provides another advantage in having relatively inexpensive land and housing prices in comparison with coastal metropolitan areas of the state.

The CEDS identifies the benefits of increased employment and higher wage jobs that a more highly skilled workforce would bring to the region. Although the region is making progress in increasing the number of high school graduates, continued efforts to increase higher or specialized education are needed to attract industries and to retain the region's working age population.

Companies considering starting up or relocating in the region will look at the available workforce skills as a major consideration as they proceed with site selection. The region will be better positioned to capitalize on future economic growth opportunities as its citizens gain more specialized skills and increase educational access and attainment.

The industry structure of the region reflects its rural roots. Agriculture and agricultural service industries are still prominent. Agricultural industries are a way of life, a long term livelihood, and a significant part of the region's culture, heritage, and community.

High unemployment rates are a factor of dependence on resource-intensive and seasonal industries for employment opportunities and the lack of educational attainment and opportunities. Economic diversification and progress toward the region's active economic development planning efforts will be a key component of the region's vision.

Each level of government, whether at the city, county, regional, or state level, has an effect on the economic development of the region. The Central Florida Regional Planning Council (CFRPC), as the Economic Development District (EDD), has been focusing efforts in the region to develop economic strategies that will be cohesive at all levels.

Some of the economic development issues in the region include:

- the need to diversify the region's economy for long term stability and prosperity;
- the need to build a skilled workforce and increase average wages;
- the need for greater infrastructure planning and capital commitment; and
- insufficient resources, particularly for rural economic development.

Heartland 2060

The shortage of water supply, the lack of adequate transportation alternatives, the continuing stress on natural resources, and the combined problems of low educational attainment and low wage jobs led the public, private and civic leaders now known as the Heartland 2060 Leadership Team to convene a workshop on these issues in November of 2007. The CFRPC supports a regional collaboration known as the Heartland 2060 visioning effort. This effort encompasses seven counties in Central Florida including the EDD counties of Polk, Hardee, Highlands, DeSoto, and Okeechobee, and the two neighboring rural counties of Glades and Hendry located in the Souuthwest Florida Economic Development District. These counties have substantial rural and agricultural areas that have been impacted by growth pressures. The purpose of Heartland 2060 is to create a vision for the future that enables growth while preserving natural areas and protecting wildlife and agricultural production; supporting healthy communities, large and small; and ensuring a vibrant economic and social life.

While the region is characterized by unique natural habitats and agricultural heritage, it is facing major changes and challenges due to growth and development. In establishing a clear vision, we can guide a strong future economy and economic diversification, and ensure preservation of our unique values, a mix of urban and rural lifestyles, and natural resources all while supporting sustainable growth and development in our communities. The Heartland 2060 visioning effort addresses such issues as economic development, education and workforce; transportation and land use; environment and natural resources; and community resources such as health systems, healthy communities and cultural resources. Relationships were developed among leaders from the public, private, civic, business, agricultural, cultural, educational and scientific communities. The following Core Values were developed based upon the participation of this diverse group.

Figure 1. Heartland 2060 Counties

Core Values of the Heartland

1. Stewardship of Natural Resources
2. Our Water Resources
3. Respect for Agriculture
4. Our Communities
5. Future for Our Children
6. Sustainable Growth

Heartland 2060 Leadership Team and Issue Task Forces

The Leadership Team and the following Task Forces have worked since 2008 on the following key issues for the region.

Education, Workforce and Economic Development

Key Issues:

- Economic Diversification
- Infrastructure to Support a Diversified Economy
- Early Learning
- K-16 and Lifelong Education (Creating a 2060 Workforce)

Environment and Natural Resources

Key Issues:

- Water
- Sustainable and Viable Natural Systems
- Agriculture
- Climate and Energy Change

Community Resources

Key Issues

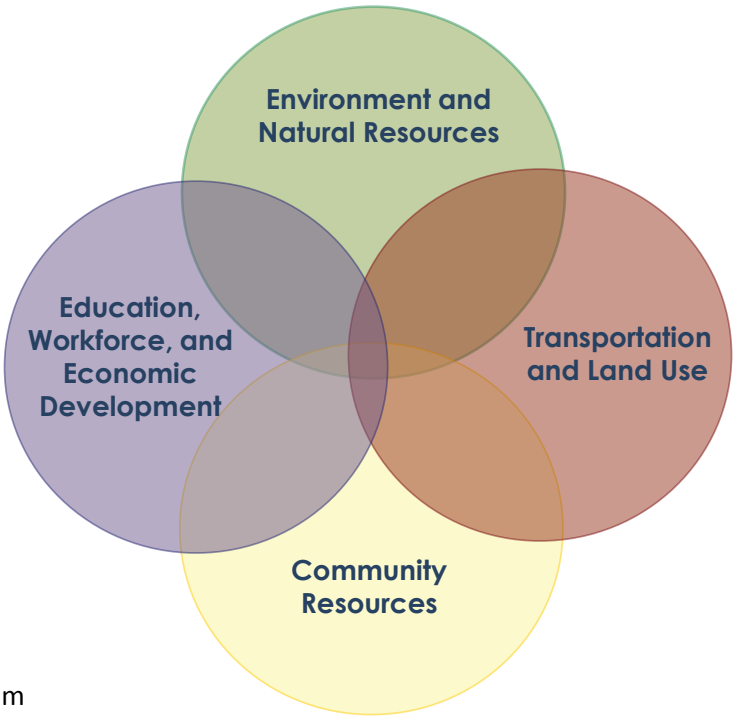
- Health Care
- Cultural Resources (Cultural Identity)

Transportation and Land Use

Key Issues

- Integrating Transportation with Natural Resources Planning
- Supporting Economic Development
- Creating a Multimodal Transportation System
- Enhancing Existing and New Sustainable Communities

Figure 2. Issue Task Forces



STRATEGY REPORT

Regional Economic Development Background

The Central Florida Regional Planning Council (CFRPC) is one of eleven regional planning councils in the state of Florida, and covers a five-county area consisting of Desoto, Hardee, Highlands, Okeechobee, and Polk counties. The entire region is inland, with no coastal areas, and is both urban and rural in character. Approximately two thirds of the population resides within the region's three urban areas (as defined by the Census Bureau[1]): Lakeland, Winter Haven, and Sebring/Avon Park. In the remaining rural areas, the predominant industries—and the historical mainstays of the entire region's economy—are citrus groves, cattle production, and phosphate mining. The CFRPC was designated as the Economic Development District for the five-county region in 1976.

The Comprehensive Economic Development Strategy (CEDS) is designed to bring the public and private sectors together in an effort to provide a vision of the future for the Central Florida region and create an economic plan to diversify and strengthen the regional economy. Over a five-year timeframe, the CEDS targets the near future's most promising industries with the goal of creating high-value-added jobs, capital investment, and economic benefit. The CEDS serves as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, identifying investment priorities and funding sources, and assigning lead organizations with responsibilities for the execution of action items. As a performance-based plan, the CEDS serves a critical role in the region's efforts to remain competitive in the face of economic pressures due to global trade, competition, and other events resulting in the loss of jobs and private investment. The CEDS is the product of a continuing economic development planning process, developed with broad-based and diverse public and private sector participation, and contains a specific program for intra-district cooperation and public investment.

Figure 3. CFRPC and FHREDI Regions

The area served by the CFRPC is also known as the Central Florida EDD (Economic Development District) VII, and overlaps with one of the State of Florida's Rural Economic Development Initiative (REDI) regions. The REDI is a coalition of state and local governmental agencies whose aim is to foster economic development in economically distressed rural areas. Through this program, the REDI designation areas have an array of programs to assist the area's economic development activities. Four of the CFRPC's counties (Desoto, Hardee, Highlands, and Okeechobee), plus two other non-coastal counties (Glades and Hendry), make up Florida's Heartland Regional Economic Development Initiative (FHREDI) (see Figure 1). FHREDI's main function is to implement a business plan aimed at improving the population's quality of life through developing and improving infrastructure, securing waivers of state agency fees for communities, improving medical care, increasing the scope of cultural activities, and helping individuals and companies obtain federal grants, loans, or special designations (such as a Foreign Trade Zone or Empowerment Zone). The Division of Strategic Business Development (as part of the newly organized Department of Economic Opportunity, which replaced the Office of Tourism, Trade and Economic Development(OTTED) and Enterprise Florida have spearheaded the "Catalyst" project in the FHREDI

[1] United States Census Bureau (2012) "Federal Register, Vol. 77, No. 59"

region. This project was initiated in three designated rural areas of the state with the intent of creating one large new development project in each area. Under the Catalyst Initiative, all local governments within the rural area can participate in the investment required to implement a job-creating project within the area and share in additional revenues generated by the project.

Polk County's economic development program is spearheaded by the Central Florida Development Council (CFDC). The CFDC was established by the Polk County Board of County Commissioners in the mid-1980s. The goal of the agency is to recruit businesses to the county at the national and international levels, and to retain and expand existing businesses. Another important function of the CFDC is to provide aid to businesses in negotiating governmental procedures, such as permitting and regulatory assistance. In addition, the Cities of Lakeland and Winter Haven have their own Economic Development Councils (EDCs), and DeSoto, Hardee, Highlands, and Okeechobee counties each have EDCs or other local economic development organizations.

Economic development in any given region takes place partly as an outcome of planned initiatives and partly as a result of market forces. Some aspects of economic development cannot be planned for at the local or regional level since they result from economic forces that are national or global in nature. Thus, the various bodies charged with economic development must conduct solid planning while also remaining flexible enough to respond to unplanned events. Successful public-private business relationships are formed through the facilitation of both planned and unplanned economic development.

The development of the CEDS is guided by the CEDS Committee. The Committee is comprised of representatives of both the public and private sectors as indicated in Table 1.

Table 1. Economic Development District VII CEDS Committee Membership

Name	Agency/Company Represented	EDA Criteria	Public Sector	Private Sector
Todd Parker	Arr Maz Custom Chemicals, Inc.	Private Sector		X
Spiros Balntas	Central Florida Development Council	Business Industry, Economic Development, Private Sector		X
Douglas Conner	Clear Springs Land Co.	Private Sector		X
Donna Doubleday	Executive Director, CareerSource Heartland	Workforce Development	X	X
TBD	Mosaic	Private Sector, Business Industry		X
Gina Reynolds	Florida's Heartland Regional Economic Development Initiative	Business Industry, Economic Development	X	X
Tim Texley	Century Link	Private Sector		X
Michelle Boylan	Highlands County Economic Development Council	Economic Development	X	X
Mike Willingham	Sebring Airport Authority	Business Industry	X	X
TBD	South Florida State College	Educational Institution	X	
Mandy Hines	DeSoto County Economic Development Office	Economic Development	X	
Bruce Lyon	Winter Haven Economic Development Council	Economic Development		X
Raymond Royce	Heartland Agricultural Coalition Town of Lake Placid Council	Business Industry, Local Government	X	X
Rae Dowling	Florida Power & Light	Business Industry, Private Sector		X
John Gurney	Okeechobee Chamber of Commerce Board	Economic Development	X	X
Bill Lambert	Hardee County Economic Development	Public Sector	X	
Jerry Miller	Duke Energy	Private Sector		X

Analysis of Strengths, Weaknesses, Opportunities and Threats

Population Trends

The region's population at the 2010 census was 803,470, with an additional increase during the winter season. Polk County, with 602,095 residents, accounts for 75 percent of the population. The growth rate for the five-county area from 2000 to 2010 was 20.6 percent. This was slightly higher than the state's growth rate of 17.6 percent.

Largely due to a long-term influx of retirees, age distribution in Florida departs from national trends. According to the 2010 census, 17.3 percent of Florida's residents are 65 or older, compared to 13 percent nationally. The 5-county Central Florida region has an even greater share of seniors, with approximately 19.5 percent of the region's population 65 years and over. A smaller share of workforce-age residents in the region presents an economic development challenge in terms of available and skilled labor for businesses considering expansion or relocation to the region. Retirees, however, also represent an opportunity for the region as they can introduce skill-sets into the region and serve as mentors to other people in communities. The region's population is aging; between 1980 and 2010, the median age in each of the five counties increased by at least four years. However, the share of residents 65 and older has held steady in the last decade (20.0 percent in 2000 and 19.5 percent in 2010).

By 2030, the region is expected to add an additional 283,308 residents, a 36 percent increase[2]. A growing population may help to stimulate economic activity in the region (e.g., construction, retail, services) and is likely to expand the labor supply, making the region more attractive to prospective businesses.

Both Florida and the region attribute a majority of their population growth to in-migration, both domestic and foreign. From 2000 to 2010, net migration accounted for 81.6 percent of Florida's population change, while for the 5-county region it accounted for 83.0 percent[3].

Table 2 displays the various population estimates and growth rates.

Table 2. Central Florida Population Growth, 1980-2010

Geographic Area	Population				Population Growth Rate (2000 to 2010)
	1980	1990	2000	2010	
DeSoto	19,039	23,865	32,209	34,862	8.2%
Hardee	20,357	19,499	26,938	27,731	2.9%
Highlands	47,526	68,432	87,366	98,786	13.1%
Okeechobee	20,264	29,627	35,910	39,996	11.4%
Polk	321,652	405,382	483,924	602,095	24.4%
5-County Region	**428,838**	**546,805**	**666,347**	**803,470**	**20.6%**
Florida	9,746,961	12,938,071	15,982,824	18,801,310	17.6%
United States	226,545,805	248,709,873	281,421,906	308,745,538	9.7%

Source: U.S. Census Bureau

[2] Bureau of Economic and Business Research (BEBR) "Projections of Florida Population by County, 2010–2040." Florida Population Studies, Vol 44, Bulletin 159, June 2011.
[3] Bureau of Economic and Business Research (BEBR) "Florida Population: Census Summary 2010." Gainesville: University of Florida, 2011.

Migration

Migration (people moving into the region) has accounted for the vast majority of recent population growth (see Table 3). According to estimates by the Bureau of Economic and Business Research (BEBR), 83 percent of the region's population increase from 2000 to 2010 was due to migration, resulting in a net gain of 113,795 people[4]. The remaining 17 percent represents the natural increase in the region's population (births minus deaths), resulting in a net gain of 23,328 people. All counties in the region except Highlands (-3,515) had a positive natural increase (more births than deaths); all counties except Hardee (-2,039) had positive net migration (more people moving into the county than moving out).

Table 3. Migration and Natural Increase, 2000-2010

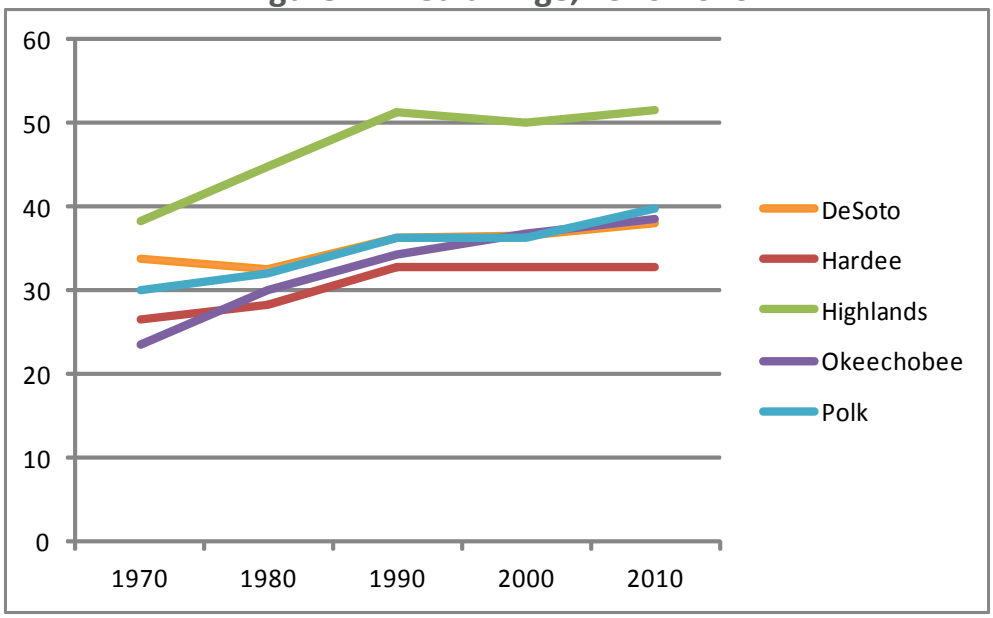
Geographic Area	Total Change	Births	Deaths	Components of Change		Percent Change Due to:	
				Natural Increase	Net Migration	Natural Increase	Net Migration
DeSoto	2,653	4,604	2,875	1,729	924	65.2%	34.8%
Hardee	793	4,869	2,037	2,832	-2,039	100%	0%
Highlands	11,420	9,741	13,256	-3,515	14,935	0%	100%
Okeechobee	4,086	5,702	3,980	1,722	2,364	42.1%	57.9%
Polk	118,171	75,124	54,564	20,560	97,611	17.4%	82.6%
5-County Region	**137,123**	**100,040**	**76,712**	**23,328**	**113,795**	**17.0%**	**83.0%**
Florida	2,818,486	2,201,011	1,682,245	518,766	2,299,720	18.4%	81.6%

Source: BEBR

Aging Population

Median ages in each of the five counties have increased during the last 40 years. The county with the highest median age is Highlands (51.5 years in 2010). Hardee County's median age, at 32.8 years, is the lowest. By comparison, the median age for all of Florida in 2010 was 40.7 years. Figure 4 illustrates the changes in median age in the region between 1970 and 2010.

Figure 4. Median Age, 1970-2010



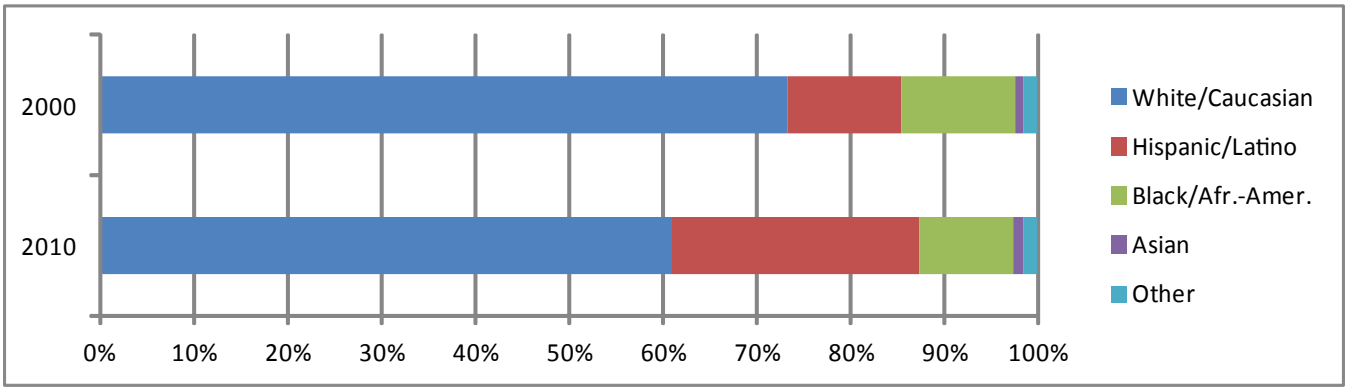
Source: U.S. Census Bureau

[4] Bureau of Economic and Business Research (BEBR) "Florida Population: Census Summary 2010." Gainesville: University of Florida, 2011.

Race and Ethnicity

The region has become more ethnically and racially diverse in the past decade (see Figure 5). In 2000, the population was 73.3 percent Non-Hispanic White, 12.1 percent Hispanic or Latino of any race, 12.2 percent Black or African American, 0.9 percent Asian, and 1.5 percent from other races or from two or more races. As of the Census of 2010, the region was 61.0 percent Non-Hispanic White, 26.4 percent Hispanic or Latino of any race, 10.0 percent Black or African American, 1.1 percent Asian, and 1.6 percent from other races or from two or more races[5]. Ninety-five percent of the net population gain from 2000-2010 was in the Hispanic/Latino population (see Table 4).

Figure 5. Change in Racial/Ethnic Distribution, 200-2010



Source: U.S. Census Bureau

Table 4. Population by Race and Ethnicity, 2000-2010

	White/ Caucasian	Hispanic/ Latino	Black/ African American	Asian	Other/2 or More Races	Total
2000 Population	488,287	80,789	81,461	5,759	10,051	666,347
2010 Population	490,073	211,737	80,405	8,703	12,552	803,470
Net Change, 2000 to 2010	1,786	130,948	−1,056	2,944	2,501	137,123

[5] Since the Census of 2000, the U.S. Census Bureau has considered Hispanic or Latino origin as an ethnicity rather than a race. To remain consistent with the methodology used by the Bureau of Economic and Business Research (BEBR), this report simply breaks down the population into four race categories plus a "Hispanic or Latino origin" category. Therefore, statistics for "White," "Black/African American", "Asian," and "Other" are all for non-Hispanic/Latino origin, while statistics for "Hispanic or Latino" are for Hispanic/Latino of any race.

STRATEGIC FINDINGS

The region's population is growing, primarily due to in-migration, and is expected to continue to grow. The trends in population indicate increasing numbers of non-English speaking minorities. The population continues to age. Table 5 summarizes the strategic findings regarding population.

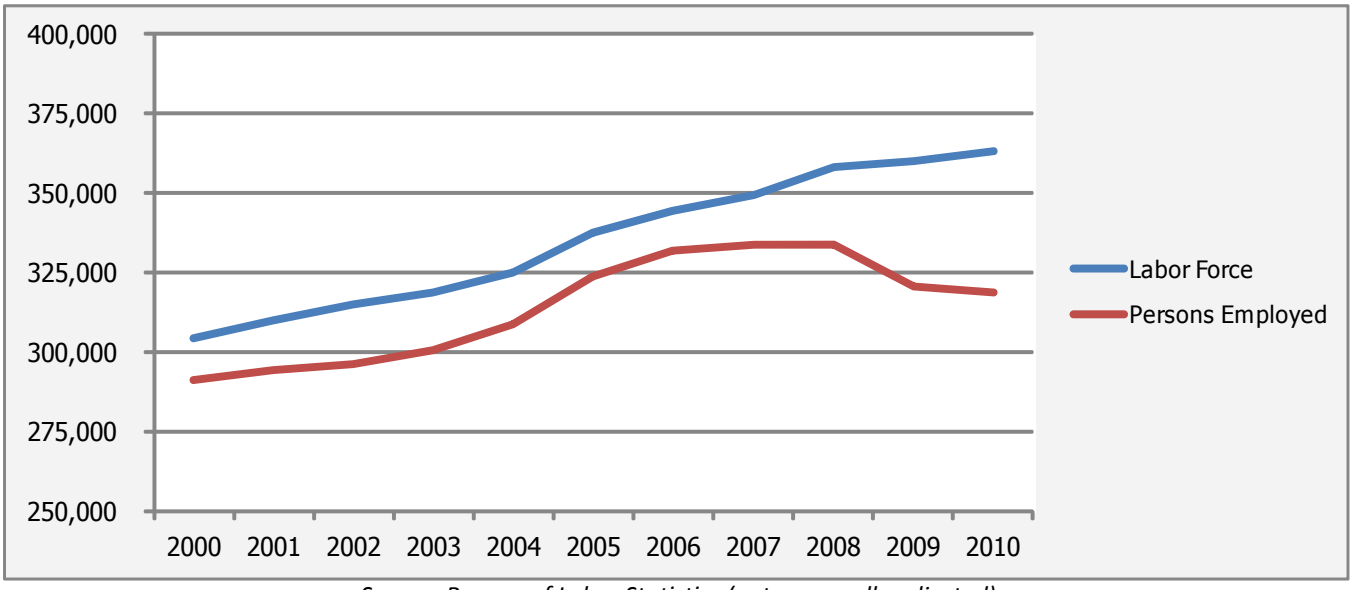
Table 5. Population Strategic Findings

Strengths:	Weaknesses:
• The region's population is continuing to grow, outpacing the state and the nation.	• Because of the region's aging population, a higher-than average proportion of people are not in the workforce and may require support services.
Opportunities:	**Threats:**
• A growing population will continue to expand the labor supply and bring new talent into the region. • Retirees may bring new skill-sets into the region and serve as mentors for workforce-age people. • With more diversity and international economy potential, a bilingual workforce may be a great asset.	• As population continues to grow, the total number of unemployed people may continue to rise. • A growing population may place a strain on the region's infrastructure.

Employment

In the period between 2000 and 2010, the total number of persons employed grew by 7.8 percent statewide and by 9.5 percent in the region, compared to 1.6 percent nationally. During the same time period, however, the labor force (the total number of people who are either working or looking for work) grew by 19.5 percent in the region (see Figure 6), compared to 17.2 percent in Florida and 7.9 percent nationally. Consequently, unemployment in the region increased from 4.3 percent in 2000 to 12.4 percent in 2010 (see Figure 7)[6]. In 2010, 57 percent of the region's population aged 16 and older was in the labor force, compared to 60 percent statewide and 65 percent nationally. This is due at least in part to the region's higher proportion of older residents.

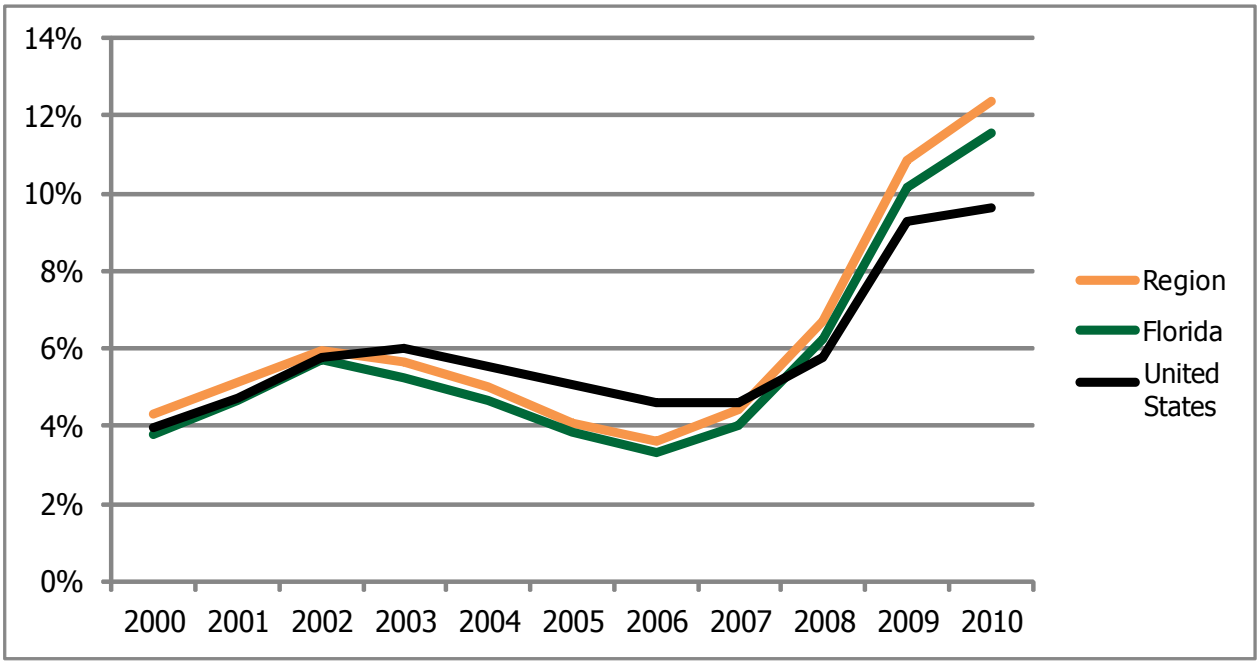
Figure 6. Labor Force and Employment in the Region, 2000-2010



Source: Bureau of Labor Statistics (not seasonally adjusted)

[6] Bureau of Labor Statistics, Unemployment Data, not seasonally adjusted. http://www.bls.gov/data/#unemployment (retrieved Feb. 23, 2012).

Figure 7. Unemployment Rate, 2000-2010



Source: Bureau of Labor Statistics (not seasonally adjusted)

Between 2000 and 2010, two of the region's key industries—manufacturing and natural resources—underwent a major decline in employment. Over the same time period, there was significant job growth in the education, health care, and financial industries. Traditionally, phosphate mining, citrus production, and cattle farming (all industries based on natural resources) have been among the region's most important industries. Although a large amount of land is still used by these industries, they now account for only a small share of total employment (see Table 6).

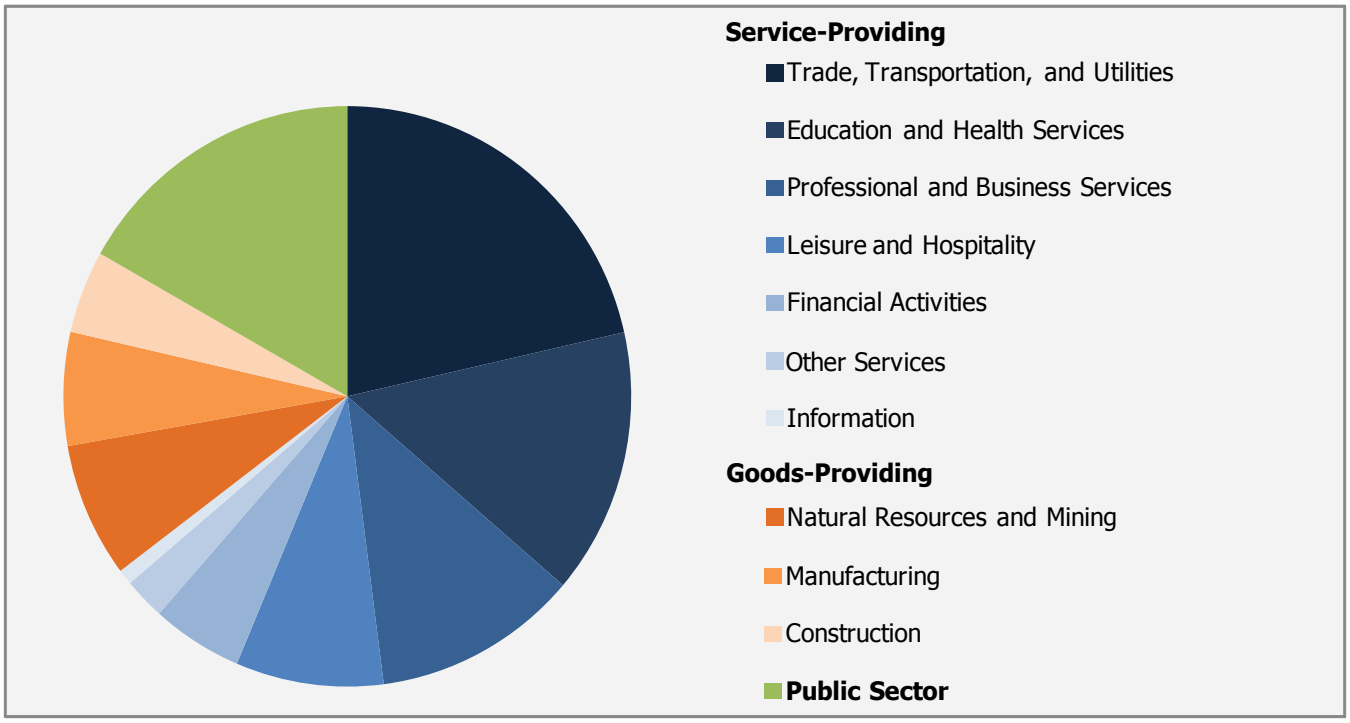
Table 6. Employment by Industry, 2000-2010

Industry	Share of Total Employment (2000)	Share of Total Employment (2010)	Change in Persons Employed, 2000-2010
Public Sector	16.2%	16.4%	6.5%
Goods-Producing Industries			
Manufacturing	8.7%	6.4%	-22.2%
Natural Resources and Mining	8.3%	6.4%	-20.1%
Construction	5.2%	4.7%	-6.6%
Service-Providing Industries			
Trade, Transportation, and Utilities	23.0%	21.7%	-1.2%
Education and Health Services	11.9%	15.3%	33.7%
Professional and Business Services	11.0%	12.0%	14.2%
Leisure and Hospitality	7.5%	8.5%	18.8%
Financial Activities	4.5%	5.3%	23.1%
Other Services	2.4%	2.4%	3.3%
Information	1.2%	0.9%	-23.4%

Source: Bureau of Labor Statistics

The industry structure of the region reflects a shift, over the last few decades, from a goods-producing economy to a service-based economy. While the agricultural and mining industries were formerly the largest employers in the region, the greatest number of jobs are now in service-providing industries such as retail trade, education, and health care (see Figure 8), which shows service industries in shades of blue and goods industries in shades of orange). This shift in the economy presents opportunities to attract new talent and investment to the region; however, it also means that there are fewer and lower-paying jobs for workers with lower levels of education and training.

Figure 8. Employment by Industry, 2010



Source: Bureau of Labor Statistics

According to estimates by Enterprise Florida[7], many of the top private sector employers in the region are in the retail and health care sectors, as well as in industries based on natural resources (see Table 7).

Table 7. Top Private Sector Employers

County	Employer	Line of Business	Number of Employees
DeSoto	Wal-Mart	Retail/Distribution	802
	DeSoto Medical Hospital	Health care	290
	Peace River Citrus	Citrus	140
Hardee	Florida Institute for Neurological Rehabilitation	Health care	550
	Wal-Mart	Retail/Distribution	288
	MOSAIC	Phosphate	277
	C.F. Industries	Phosphate	175
Highlands	Florida Hospital Heartland Division	Health care	1,300
	Cross Country Automotive Services	Call Center	500
	Highlands Regional Medical Center	Health care	500
	Wal-Mart	Retail/Distribution	450
Okeechobee	Columbia Raulerson Hospital	Health care	365
	Walpole, Inc.	Transportation	300
	Larson Dairy, Inc.	Dairy	225
	McArthur Farms, Inc.	Dairy	160
Polk	Publix Super Markets	Grocery	9,300
	Wal-Mart	Retail/Distribution	5,100
	Lakeland Regional Medical Center	Health care	4,600
	Winter Haven Hospital	Health care	2,500

Source: Enterprise Florida

STRATEGIC FINDINGS

Continuing population growth and a decline in total employment have combined to push the region's unemployment rate above state and national averages. Manufacturing and natural resources have seen a significant decline in employment, while education and health services have added an increased numbers of jobs. Table 8 summarizes the strategic findings regarding employment.

Table 8. Employment Strategic Findings

Strengths:	Weaknesses:
• The region's economy has shown an ability to reinvent itself, moving away from employment based on natural resources toward the service sector.	• Unemployment has increased dramatically. • Employment in the region's traditional industries has declined rapidly.
Opportunities:	**Threats:**
• Rapid growth in new sectors (e.g. health care) presents an opportunity to bring new economic development to the region and new job opportunities for residents.	• Unemployment may continue to increase. • The region's workforce may not have the skills necessary to adapt smoothly to the shift in key industries that is taking place.

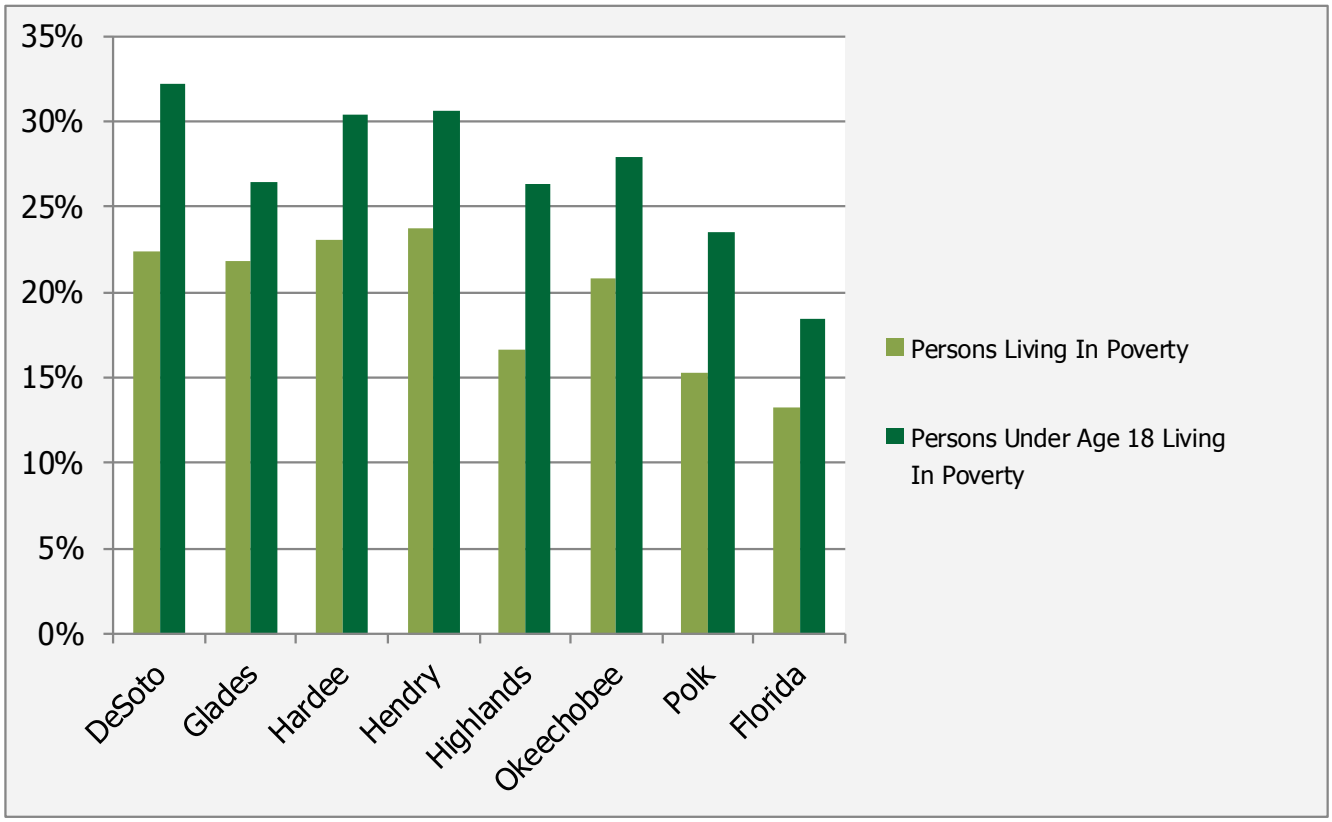
[7] Enterprise Florida. County Profiles (last accessed Feb. 23, 2012)

Wages and Income

Average annual wages in the region were approximately $34,448 in 2010 compared to $41,581 statewide and $46,751 nationally[8]. Per capita income in the region is also substantially lower than statewide and national figures. In 2010, according to U.S. Census estimates, per capita income in the region was $20,983, compared to nearly $26,551 for Florida and $27,334 for the Nation. Per capita income data do not include transfer payments such as social security, and the region's large population of retired persons may explain some of this effect. However, it is likely that educational attainment and the jobs available in the region also play a part in the low per capita income.

Following a similar trend to income and wages, the poverty rate for the region continues to exceed state and national averages (see Figure 9). In 2010, an estimated 15.3 percent of the region's residents were living in poverty, according to the Census Bureau. Moreover, 23.7 percent of children under 18 were living below the poverty threshold, suggesting that families with children are especially affected by poverty.

Figure 9. Percent of the Population Living Below the Poverty Threshold



Source: U.S. Census Bureau

[8] Bureau of Labor Statistics Flat (last accessed February 23, 2012)

STRATEGIC FINDINGS

Wages and per capita income in the region continue to lag behind state and national averages. This results in a high poverty rate throughout the region. Table 9 summarizes the strategic findings of wages and income.

Table 9. Wages and Income Strategic Findings

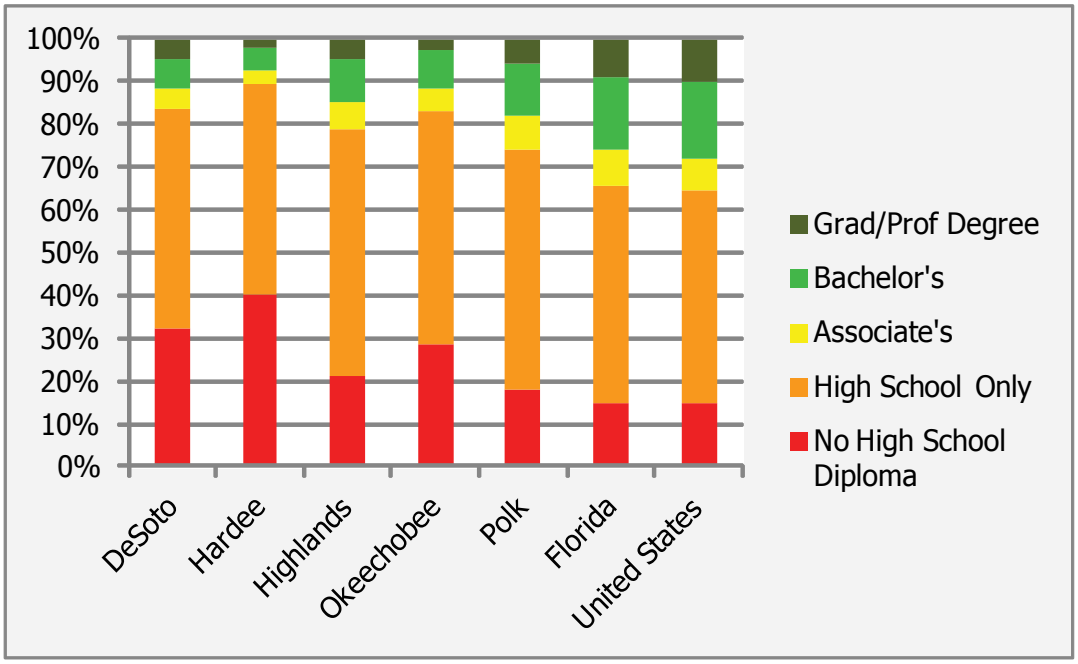
Strengths:	Weaknesses:
• None identified.	• Wages and per capita income are lower in the region than in the state and the nation. • The poverty rate in the region is higher than in the state and the nation.
Opportunities:	**Threats:**
• Low wages may be attractive to some potential employers, helping to bring new businesses to the region.	• Wages may continue declining and poverty rates may continue to increase, especially if unemployment keeps rising.

Education and Workforce Development

The Central Florida region shares workforce development issues with most other rural areas. The Region's workforce is characterized by low graduation rates and high out-migration of young students and workers to urban and scholastic centers. Businesses, especially in high-tech fields, are often challenged to find well-trained administrative, management, and even entry-level employees. A major step forward for workforce development has been the inclusion of relevant training in K-12 and community college curricula to provide advanced technical training in fields that do not require baccalaureate studies.

Region-wide, according to 2010 U.S. Census estimates, 20 percent of adults aged 25 and older have no high school diploma or equivalent; 56 percent have a high school diploma and no further degree; 7 percent have an associate's degree; and 17 percent have a bachelor's, graduate, or professional degree. Compared to Florida and the nation, all counties in the region have a lower percentage of adults with postsecondary degrees and a higher percentage of adults with no high school diploma (see Figure 10).

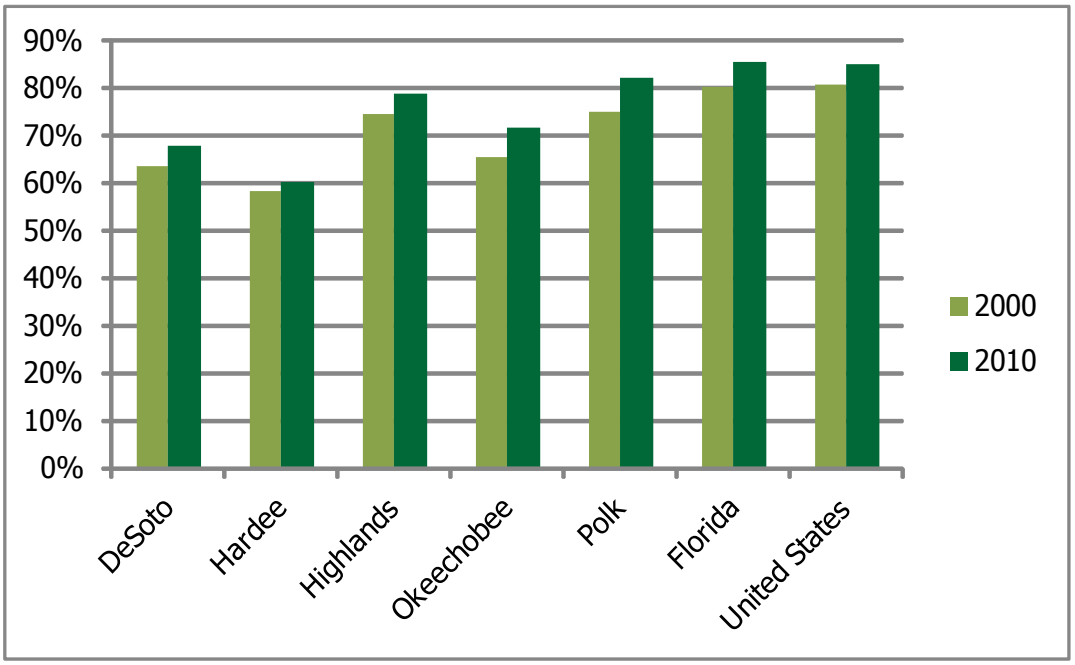
Figure 10. Educational Attainment for Adults 25 and Older (2010)



Source: U.S. Census Bureau

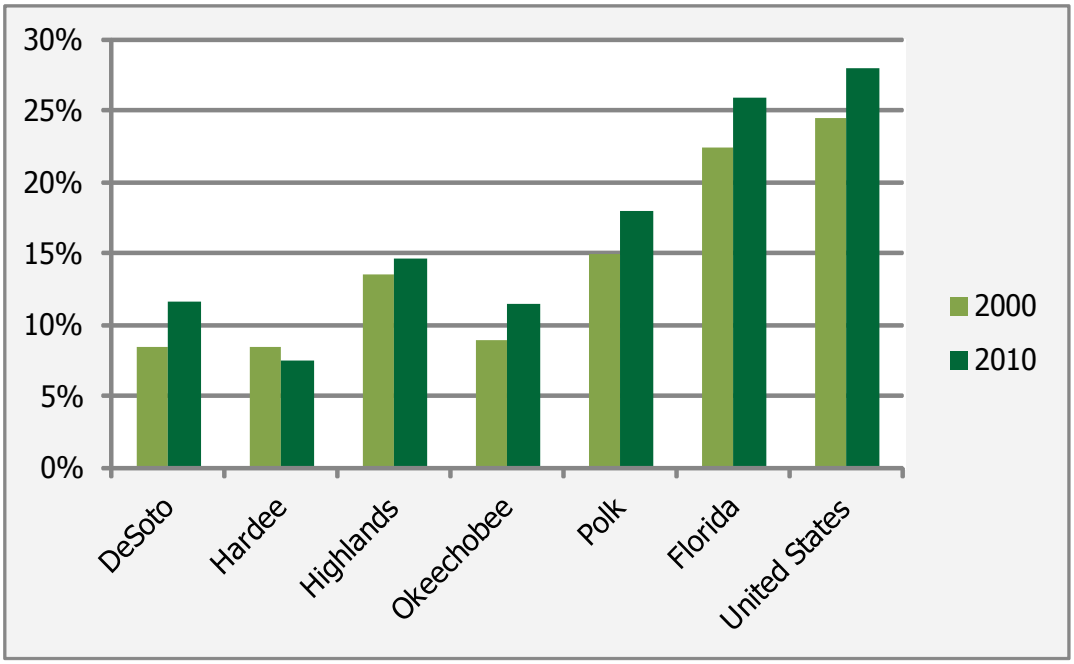
From 2000 to 2010, the region showed a positive trend in educational attainment, in line with similar trends that occurred statewide and nationally. The percentage of adults 25 and older with a high school diploma or equivalent increased in all five counties (see Figure11). In four of the five counties, the percentage of adults with postsecondary degrees increased (see Figure 12).

Figure 11. Percent of Adults 25 or Older with High School Diploma or Equivalent



Source: U.S. Census Bureau

Figure 12. Percent of Adults 25 or Older with Bachelors Degree or Higher Degree



Source: U.S. Census Bureau

Despite these positive trends, the region continues to lag behind Florida and the nation in terms of educational attainment, creating a significant issue for workforce and economic development. The disparity is similar for people with advanced (post-graduate) degrees: over 10 percent in the U.S. and 9 percent in Florida, but only 5 percent in the region. In today's increasingly information-based economy, where higher-paying jobs tend to follow workforce skills, the educational data for the region highlight one of the key challenges to economic development.

As of Fall 2011, there were 124,346 students enrolled in the region's public schools. Fourty-six percent were White (non-Hispanic/Latino); 30 percent were Hispanic or Latino of any race; 19 percent were Black (non-Hispanic/Latino); and 5 percent were from other races (non-Hispanic/Latino). A total of 11,454 students (9.2 percent) were classified as "English Language Learners." [9]

STRATEGIC FINDINGS

Educational attainment in the region is lower than in Florida or the United States. However, attainment improved in the last decade. Table 10 summarizes the strategic findings for education and workforce development.

Table 10. Education and Workforce Development

Strengths:	Weaknesses:
• High school graduation rates and college graduation rates are improving in the region.	• Educational attainment in the region still lags behind the state and the nation.
Opportunities:	**Threats:**
• A more educated workforce presents new opportunities for the region, even if it continues to lag behind national trends.	• Employment prospects are getting worse for workers with lower levels of education and training. The poverty cycle will continue if educational attainment does not improve even further.

[9] Florida Department of Education, "Data Publications and Reports: Students." (retrieved March 13, 2012)

Geography and Climate

The Central Florida region is located geographically in the center of the Florida peninsula. Its five counties (DeSoto, Hardee, Highlands, Okeechobee, and Polk) consist of a land area of 4,951 square miles. The region is unique among the eleven state-designated Economic Development Districts in that it is completely inland, with no coastal counties. Primarily rural in nature, with the exception of the urbanized areas, the region is agriculturally based with small, widely dispersed population centers. The region is characterized by a subtropical climate with abundant rainfall occurring mainly in spring, summer, and hurricane season (June to November).

Water Resources

The Central Florida region is the point of origin for significant natural resource systems influencing much of peninsular Florida. The Green Swamp in northern Polk County is the potentiometric high for the principal groundwater resource of the peninsula, the Floridan Aquifer. The total groundwater in the Floridan Aquifer is estimated to have about one-fifth the volume of the Great Lakes.[10] Much of this quantity is needed to maintain the aquifer's hydrologic pressure against saltwater intrusion, and is thus unavailable for direct use. The Green Swamp also provides headwater features for five river systems in the jurisdiction of three water management districts. Two of these river systems provide critical freshwater inputs to federally designated National Estuary Programs. Another is the principal freshwater source for Lake Okeechobee and the Everglades.

These river systems serve as the spines of significant ecosystems, transcending jurisdictional boundaries. Another ecosystem, the Lake Wales Ridge, contains the remnants of a globally unique endangered habitat. The Central Florida region plays a pivotal role in the health of ecosystems throughout much of peninsular Florida.

Peace River

The Peace River is fed by the Green Swamp and some of the numerous lakes in central Polk County. It is defined as a stream beginning at the confluence of Saddle Creek and the Peace Creek Drainage Canal north of Bartow and flows southwest for approximately 105 miles to Charlotte Harbor. The Peace River is a crucial source of fresh water to the Charlotte Harbor Estuary. Numerous lakes and swamps in the headwaters of the Peace River act as important recharge areas for the Floridan Aquifer.

Kissimmee River

The Kissimmee River, which originates in the southern outskirts of the City of Orlando, borders the southeastern edge of Polk County and separates Highlands County from Okeechobee County until its termination at Lake Okeechobee. The river flows southward through two lakes and 150 miles of lowlands consisting of rangeland, agricultural lands, and wetlands to its mouth at Lake Okeechobee. From Lake Kissimmee to Lake Okeechobee, the Kissimmee River was channelized for flood control purposes. Lake Okeechobee represents a major source of fresh water for the Miami-Dade metropolitan area.

The Ridge Area

The Ridge Area runs north and south the length of the region, through Polk and Highlands Counties. It is one of peninsular Florida's topographically highest areas. The Ridge, with its fine sands and limestone base, has the highest recharge capability for the Floridan Aquifer. Some globally unique and endangered species of plants and animals are found in the Ridge Area. However, the area's well-drained, sandy soils also make it desirable for urbanization.

[10] Southwest Florida Water Management District (2009) "West-Central Florida's Aquifers" (retrieved March 5, 2012)

Bone Valley

Bone Valley is a geological region containing one of the largest known phosphate rock deposits in the United States. It stretches from just north of the City of Mulberry in Polk County to just south of the City of Arcadia in DeSoto County, spanning east-west from the Peace River to the western borders of Polk, Hardee, and DeSoto Counties. Phosphate was first mined in the region in the 1880s and a lucrative industry evolved around the deposits of phosphate rock, which is primarily used to produce chemical fertilizers. Approximately 10 million tons of phosphate and phosphate-related materials pass through the Port of Tampa each year. The phosphate industry owns or has mineral rights to about 443,210 acres of Florida land.[11] Present day operations have the capability to mine over 6,000 acres per year and produce approximately 18 million tons of phosphate rock.[12] Phosphate mining is highly regulated, and requires federal, state, and local permits. All mined land must be reclaimed within one year of phosphate extraction.

Climate

The region's climate is humid and subtropical throughout. The temperature averages about 73 degrees year-round. Annual rainfall averages between 50 and 56 inches, with more than half occurring between June and September. Most of the rainwater reenters the atmosphere through evaporation and plant transpiration. The rest recharges the aquifer or seeps into the Peace River and its tributary streams. Responding to the dynamic rainy season, the river peaks in late summer and early fall, unlike the rivers of north Florida, which achieve their peak flows in late winter and early spring.

After many decades without significant hurricane activity, three hurricanes – Charlie, Frances and Jeanne – crossed the region within six weeks of one another in 2004. Hurricane Charlie was especially devastating in the region, with Category 3 winds affecting DeSoto, Hardee, and Polk Counties.

Numerous riverine ecosystems originate in the Central Florida interior, and the region is inextricably involved in the health of ecosystems throughout much of peninsular Florida. Riverine ecosystems are critical components of coastal estuarine systems, since the estuaries are fed by fresh water flowing from inland. Thus, the health of the region's ecosystems has a direct impact on the health of estuaries, particularly the Charlotte Harbor Estuary.

In order to ensure a reliable supply of potable water for the future, it is essential to preserve and enhance the natural function of the region's environmental systems. Water resources, both for economic development and general development use, will be a major challenge facing both the state and this region in the coming decades. Conserving water, developing alternative sources, and reusing water resources will be important elements in the economic development of the region. In addition, the preservation and restoration of natural habitats and ecosystems will give rise to increased opportunities for ecotourism.

As the coastal areas of the state become saturated with population, and the cost of developing and residing along the coasts continues to rise, the Central Florida region may become more attractive for population and economic development. The region's resources provide a natural location for the next wave of growth expected over the next 25 years. The protection of natural resources will need to be balanced with the accommodation of growth and economic development. Over the long term, sustainable development will make the region more livable and prosperous, with a reduced impact on the environment.

[11] University of South Florida Polytechnic, Florida Industrial and Phosphate Research Institute "The Phosphate Industry and Florida's Economy" (retrieved Mar.ch 5, 2012).
[12] Florida Institute of Phosphate Research

STRATEGIC FINDINGS

Table 11 summarizes the strategic findings of geography and climate.

Table 11. Geography and Climate Strategic Findings

Strengths:	Weaknesses:
• The region has abundant natural resources that have supported strong industries of phosphate mining and citrus groves.	• The region's supply of water from the Floridan aquifer is limited. • Phosphate deposits are finite, and are decreasing in northern areas of the Region.
Opportunities:	**Threats:**
• The region's unique ecosystems present opportunities for ecotourism.	• Agricultural lands are threatened by disease and climate variations.

Land Use and Economic Development

Diversification of the regional economy is dependent upon suitable land use for a variety of industries, businesses, and agricultural support facilities as well as institutional, governmental, and residential-support uses. To ensure this is not a hurdle, a variety of future land uses is appropriate. A Comprehensive Plan that supports future land uses and infrastructure to support those land uses while avoiding unnecessary encroachment upon natural systems will provide a timely and orderly action plan for economic prosperity.

Existing Land Use

The Central Florida region has three urbanized areas (Lakeland, Winter Haven, and Avon Park/Sebring). The remainder of the region is primarily rural and agricultural, specializing in citrus, cattle ranching, and phosphate mining by percentage of total area. The Avon Park Air Force Range (located in northeastern Highlands County and southeastern Polk County) is designated as public, institutional, and government land. It consumes a vast amount of land that functions primarily as conservation, but also serves as a military training area and outdoor recreational area with some institutional uses. Residential and residential-support uses are primarily centered in existing towns, cities, and communities, but many rural residential areas also exist. Mining accounts for a significant area in the southwest of Polk County, and the northeast of Hardee County. Mining is also present in DeSoto County. Table 12 details the number of each existing land use within the region. Figure 11 and 12 illustrate the percentages and locations od the existing land uses.

Table 12. Regional Existing Land Use

Existing Land Use	Acreage
Agricultural	1,986,470
Commercial	42,701
Industrial	27,371
Mining and extraction	90,269
Mixed Use	1,141
Multi-Family Residential	7,572
Other	198,692
Public, Institutional, and Government	473,654
Single Family Residential	257,844
Utilities, Rights-of-way, transportation, etc.	14,617

Adapted from State of Florida Property Appraiser parcel data

Figure 13. Central Florida Region Existing Land Use

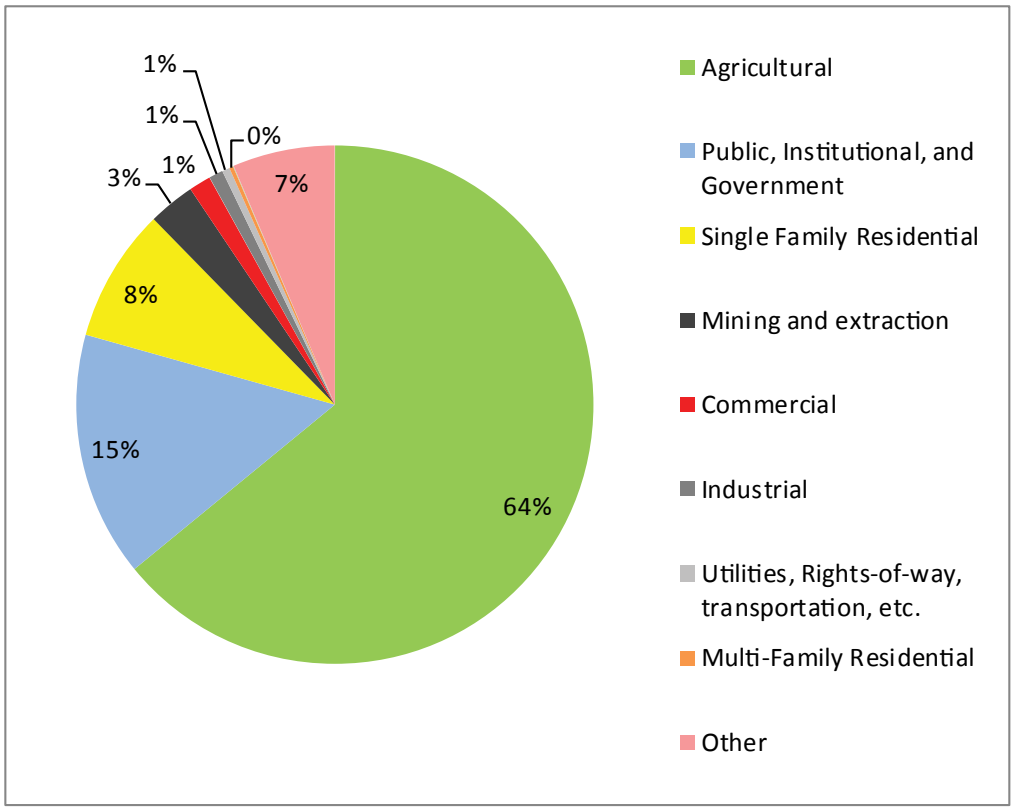
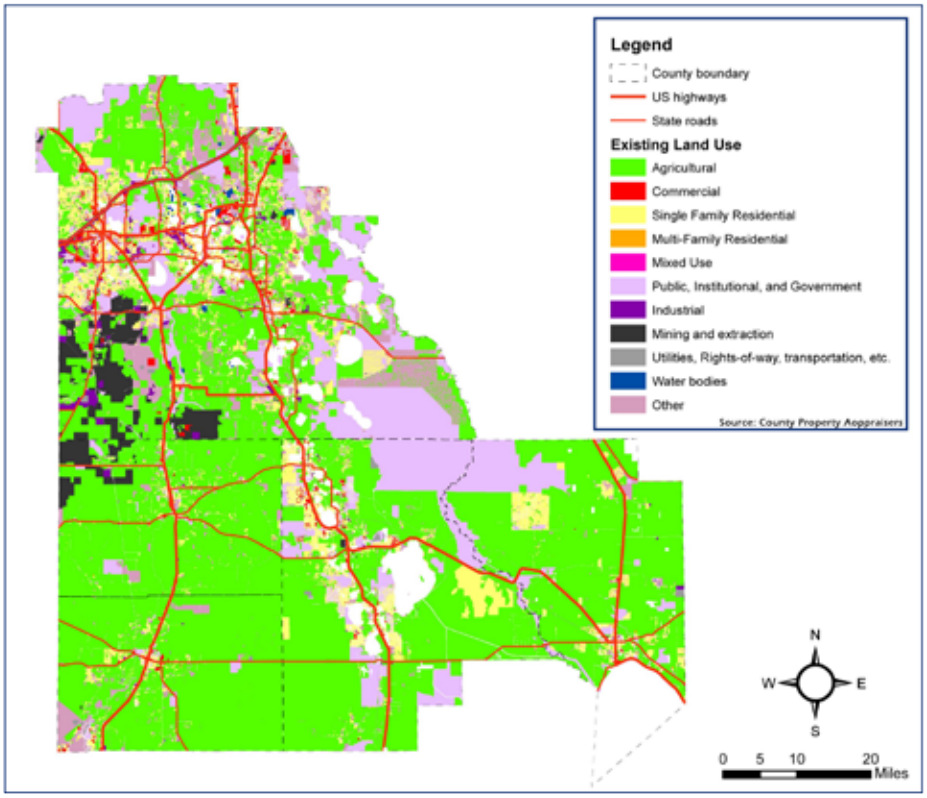


Figure 14. Central Florida Region Existing Land Use Map



Future Land Use

Figure 15 indicates the combined future land use maps for the region designate that most of the region will remain agricultural into the foreseeable future. Significant areas surrounding the Avon Park Air Force Range will remain conservation and military-oriented. Significant portions of land in northwest Hardee and southwest Polk Counties will be available for phosphate mining. Table 13 provides the acreage for each of the Generalized Future Land Use categories in the region.

Figure 15. Central Florida Generalized Future Land Use

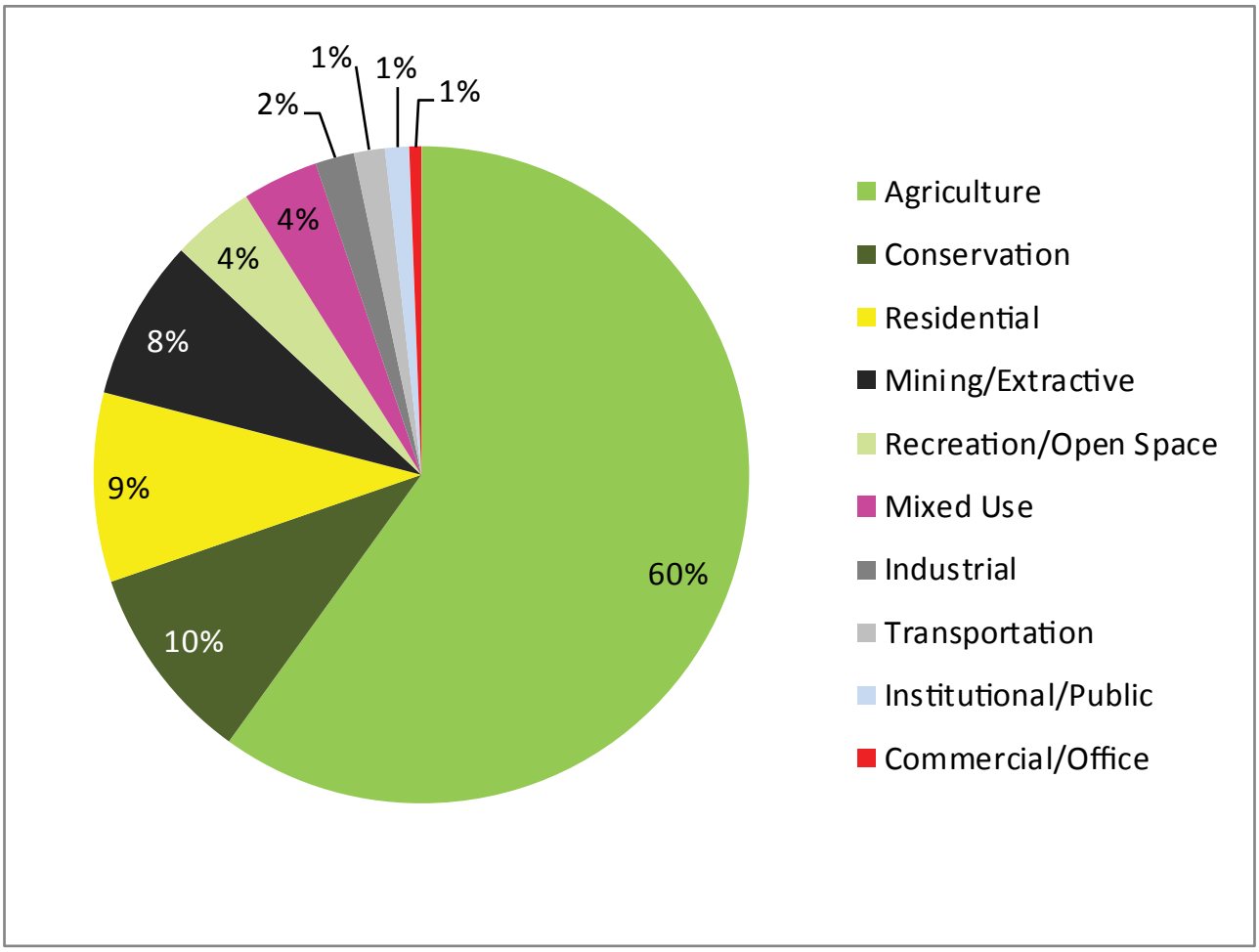


Table 13. Generalized Future Land Use

Category	Acreage
Agriculture	1,881,993
Commercial/Office	18,629
Conservation	306,372
Industrial	60,255
Institutional/Public	37,343
Mining/Extractive	248,512
Mixed Use	117,259
Recreation/Open Space	127,967
Residential, High Density	18,131
Residential, Low Density	188,020
Residential, Medium Density	51,477
Residential, Unknown Density	1,009
Residential, Very High Density	1,545
Residential, Very Low Density	31,885
Transportation	48,010
Unknown or in transition	7,284

Adapted from local government comprehensive plans

General trends in the changing nature of land use in the Region are best examined through proportional changes in land use. Agriculture currently represents 64 percent of land use, but the aggregated future land use maps of local governments, if fully executed, indicate that agriculture will only make up approximately 60 percent of land use in the year 2030 (the year to which most of the future land use datasets project). Residential land uses currently comprise just over 8 percent of existing land use, and in future land use maps, residential uses are projected to comprise approximately 9 percent. However, mixed use land uses, which are comprised of residential and other land uses (usually commercial or office), will make up the difference in the projected future land use, going from a current 0.04 percent to being approximately 4 percent of total land use. All urban land uses are indicated to be 21 percent of total land use in the future, compared with approximately 18 percent currently.[13] Table 14 provides a comparison of these land uses. Figure 16 indicates the percentage of Generalized Land Uses by category.

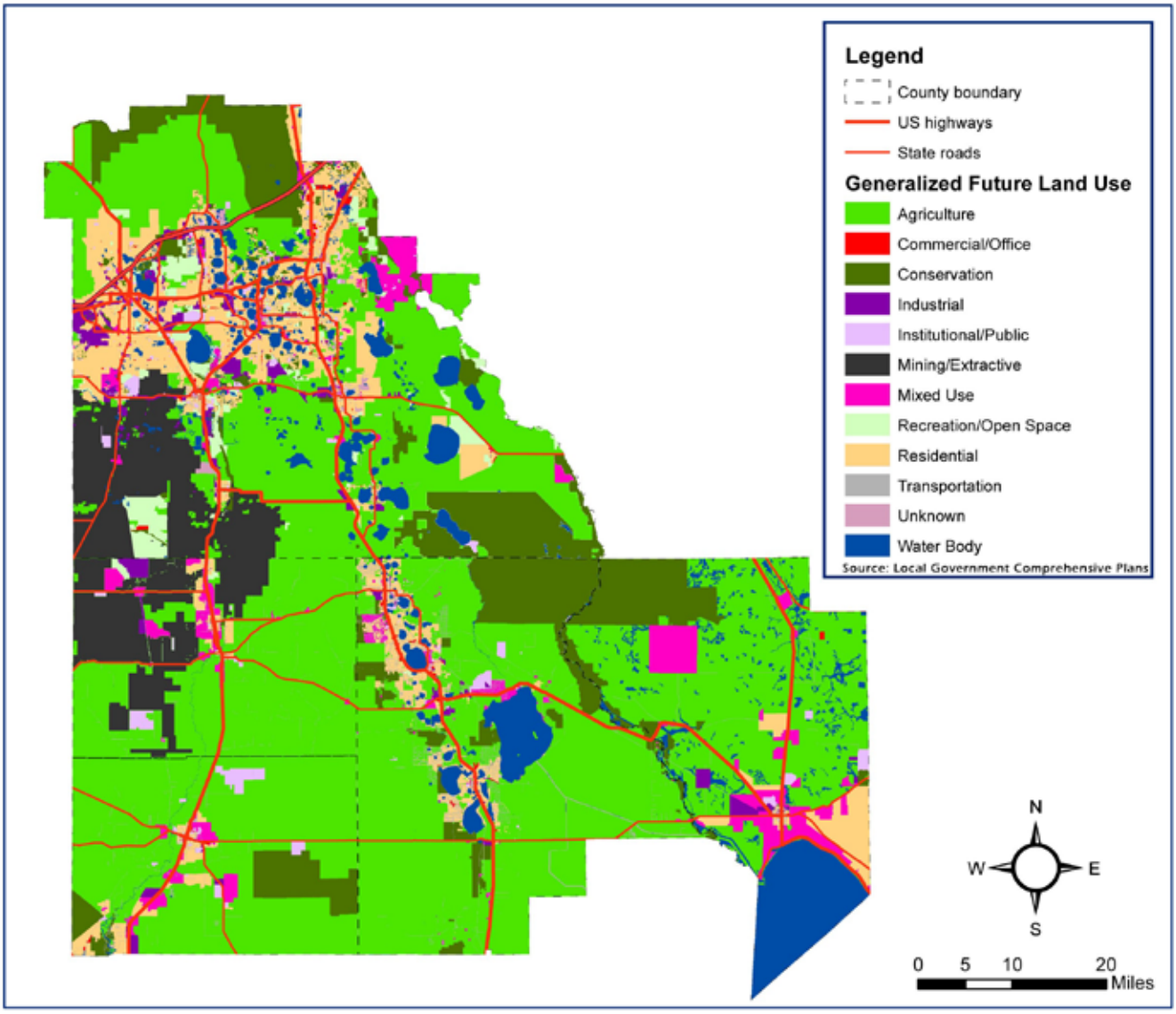
[13] Due to protocols associated with the existing land use data collection, conservation uses are not necessarily distinguishable from other uses, and are consequently lumped in to the "Other" category. This explains the discrepancy between the so-called lack of existing conservation land uses, with a projected 10% of conservation in future land uses. For instance, the vast majority of the Avon Park Air Force Base is designated as Public, Institutional, and Government in the existing land use, but is considered as Conservation in the future land use. Nevertheless, the broad trends in changes of land uses moving forward into the future are discernable from the data. (Note: some differences in acreage totals between Existing Land Use and Future Land Use may occur due to differences in the protocols of the associated datasets, however, the overall patterns depicted are still valid on a county or regional level.)

Table 14. Comparison of Selected Land Uses

Land use category	Proportion of total land uses (approx.)	
	Existing	Future
Agriculture	64%	60%
Residential and Mixed Use	9%	13%
Mining	3%	8%
All urban uses*	18%	21%

**Consists of commercial, office, industrial, mixed use, all residential, public, institutional, and government uses*

Figure 16. Central Florida Generalized Future Land Use Map



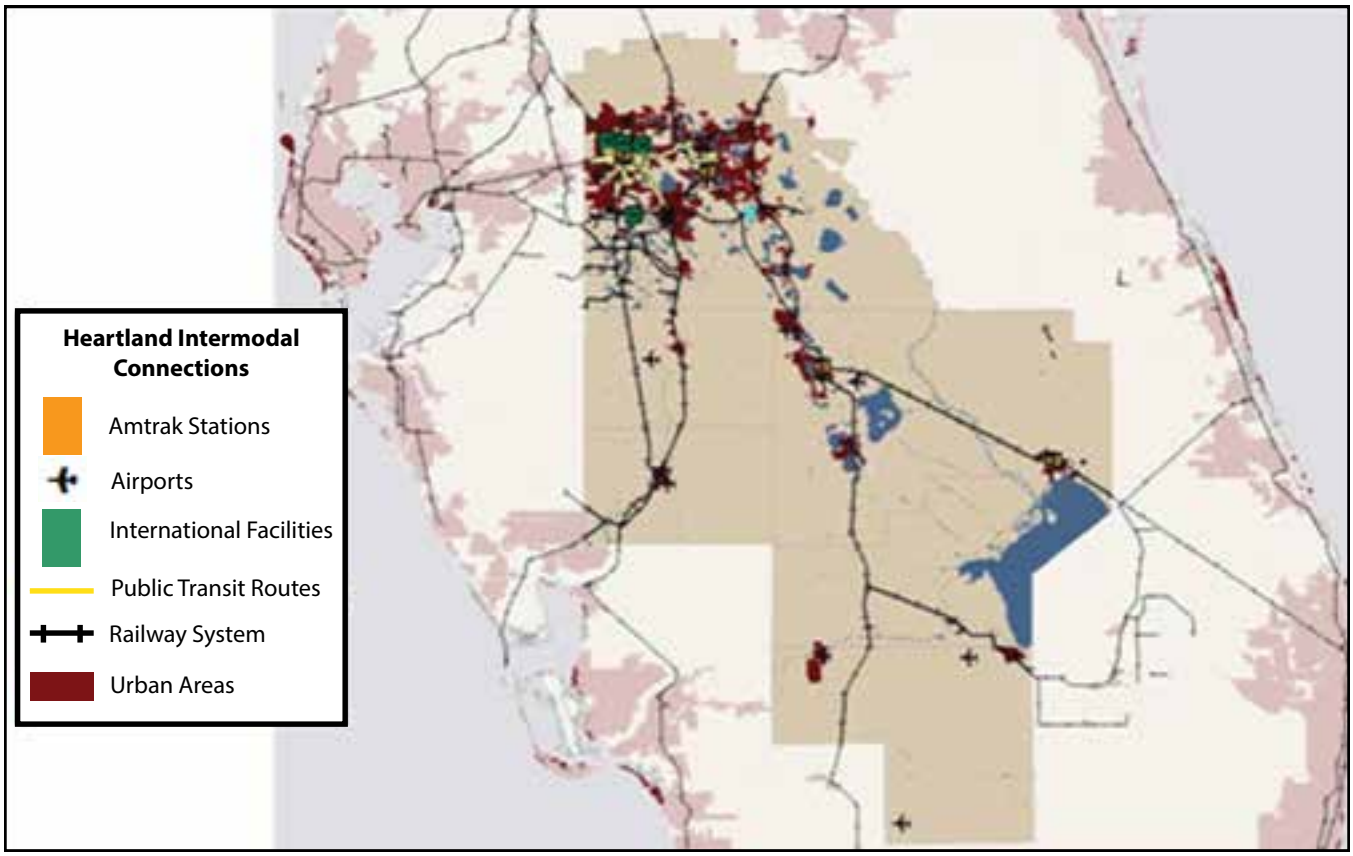
Economic Development Trends for Logistics

The Central Florida region is developing a transportation- and logistics-reliant industry. Across the region, there are high speed roads that facilitate freight transportation, particularly along the State Strategic Intermodal Systems (SIS) network. The SIS is a transportation network that the State has prioritized as an investment crucial to the future of Florida.

The region boasts eight regional airports, with primary hubs in Sebring (Highlands County) and Lakeland (Polk County). CSX is constructing an intermodal logistics facility near Winter Haven (Polk County). The region provides a crucial connection between Miami and Tampa, Orlando and Tampa, and Tampa and everywhere eastward, as well as connections for southwest Florida (primarily Naples, Fort Myers, and Cape Coral) and the northern part of the state (see Figure 17).

Currently, some of the freight transportation road miles in the region have become congested due to centralization of residential and residential-support uses around these highways. This congestion threatens the future of the region for the transportation industry. Increased coordination between state and local organizations regarding current and future land use and multi-modal corridors may help alleviate these congested corridors and support expansion of the logistics industry.

Figure 17. Transportation and Economic Development: Ensuring Multimodal Connectivity

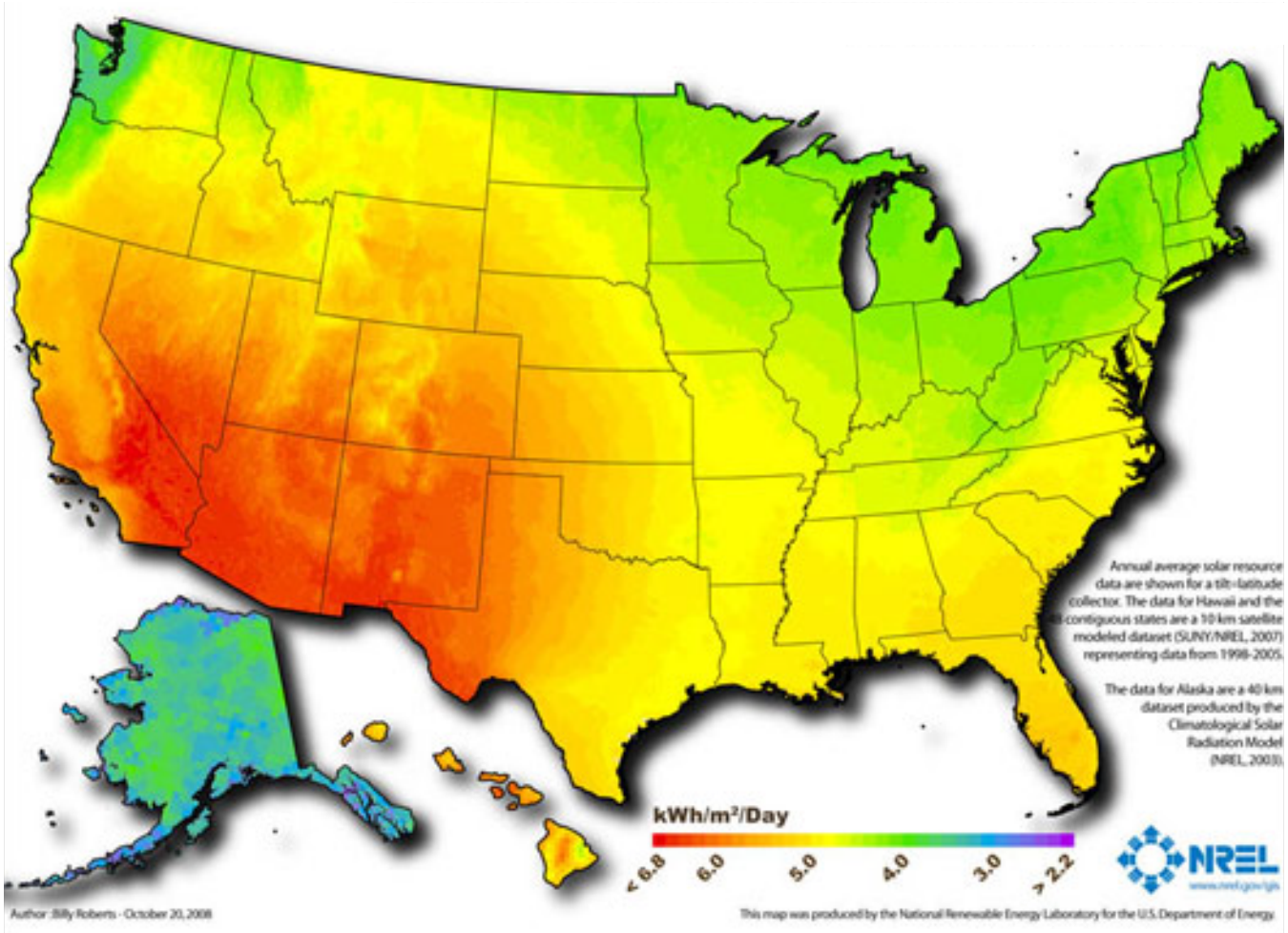


Economic Development Trends for Alternative Energy

The region has extensive natural resources for ethanol and biofuels production (energy crops, crop wastes, etc.) and solar energy production (thermal and photovoltaic). Florida has enough year-round solar gain that it is uniquely positioned to be a leader in photovoltaic electricity production for the southeastern United States. (see Figure 18)

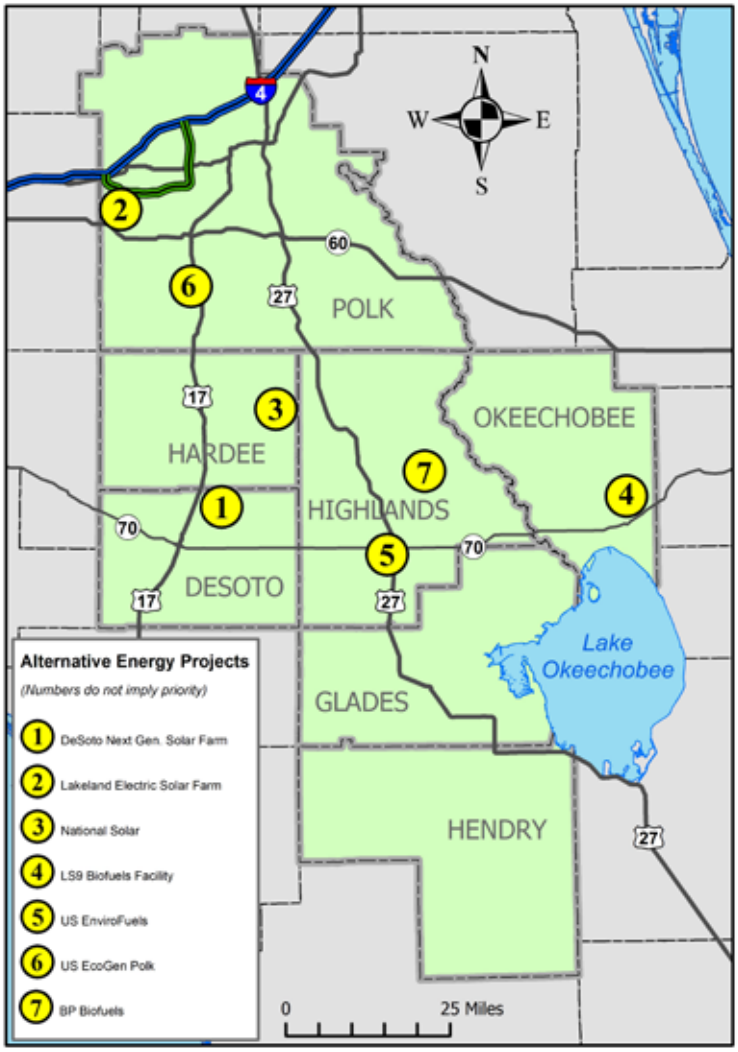
The uncertainty of continuing government subsidies for the alternative energy industry puts uncertainty into the market, which favors a less proactive approach in investment and development. Additionally, the lack of a legislative renewable portfolio standard for Florida's utilities has reduced the market for large-scale alternative energy utility establishment. However, despite this uncertainty, several alternative energy projects, primarily financed as private ventures, have already begun or been established in the Central Florida Region.

Figure 18. Photovoltaic Solar Resources of the United States



Envirofuels is a project run by BP that has been created in eastern Highlands County to grow and manufacture ethanol for blending with gasoline. Fort Meade, located in Polk County, has currently permitted the land use for the development of a biomass electricity utility, powered by eucalyptus trees, to be grown nearby. Lakeland, also located in Polk County, has a solar field for solar photovoltaic electric generation. DeSoto County has a 25 Megawatt solar photovoltaic field run by Florida Power and Light. Another solar photovoltaic field in Hardee County is also beginning the process of permitting and construction. Okeechobee County also has active alternative energy projects focusing on biofuels production. Figure 17 provides the general locations of these alternative energy projects.

Figure 19. Central Florida Region Alternative Energy Projects



STRATEGIC FINDINGS

Table 15 summarizes the strategic findings regarding alternate energy.

Table 15. Alternate Energy Strategic Findings

Strengths:	Weaknesses:
• The region has a large supply of land that is available for business development at competitive prices.	• The region's infrastructure is insufficient to meet logistics demands.
Opportunities:	**Threats:**
• Due to regional sunshine, alternative energy provides many opportunities.	• New development patterns may impact natural resources that are crucial to the region's economy.

Housing

The region contains a wide variety of housing types, ranging from colonial-style homes built in the late 1800s to modern manufactured homes and apartment buildings. Homes are in a wide variety of locations. For instance, some manufactured homes are situated on five to ten acre lots, while other homes are in more dense subdivisions or mixed use areas. Many of the cities and towns in the region have historic districts designated for the preservation of historic houses and other buildings.

Of the five counties in the region, Polk County experienced the largest amount of residential growth between 2000 and 2010, in both absolute and relative terms. The region's rate of increase exceeded the national percentage, but was less than the state.

The areas experiencing major residential developments are:

- Interstate 4 running east-west through northern Polk County;
- Northeast Polk County, abutting the Orlando suburbs;
- The Greater Lakeland Area in Polk County;
- The US 27 corridor running north-south through Polk and Highlands Counties; and
- US 17 corridor running north-south from Polk through Hardee and DeSoto Counties.

Table 16 shows the change in the number of housing units by county from 2000 to 2010.

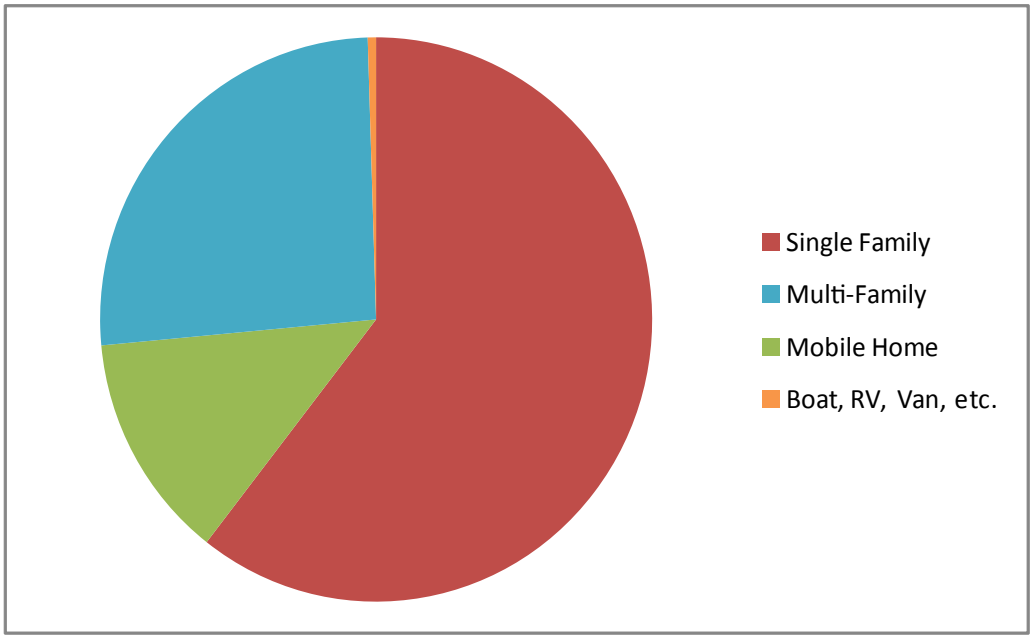
Table 16. Total Housing Units, 2000-2010

Geographic Area	Total Housing Units (2000)	Total Housing Units (2010)	Percent Change (2000–2010)
DeSoto	13,608	14,486	6.5%
Hardee	9,820	9,811	-0.1%
Highlands	48,846	54,837	12.3%
Okeechobee	15,504	18,057	16.5%
Polk	226,376	277,547	22.6%
5-County Region	314,154	374,738	19.3%
Florida	7,302,947	8,863,057	21.4%
United States	115,904,641	130,038,080	12.2%

Source: U.S. Census Bureau

Of the housing units in the region, 60.5 percent are single-family, 26.0 percent are mobile homes, 13.0 percent are in multi-family buildings, and 0.5 percent are boats, RVs, vans, or other units (see Figure 20).

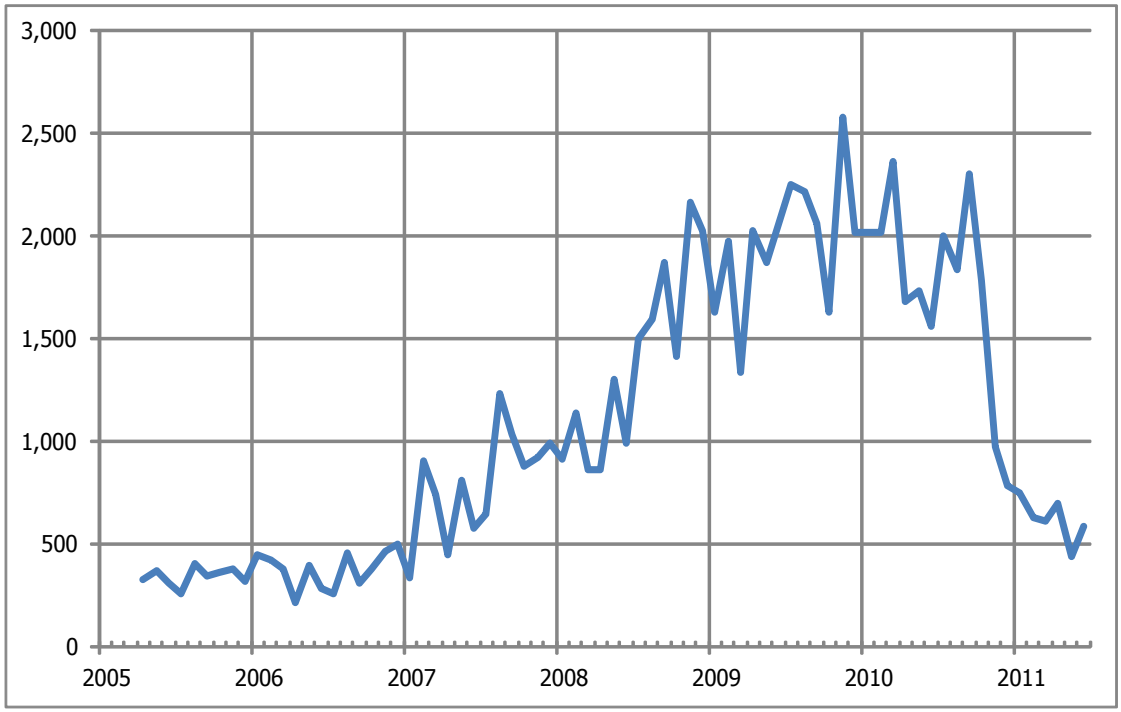
Figure 20. Housing Types in the 5-County Region



Source: U.S. Census Bureau

Like the rest of the nation (and Florida in particular), the region was strongly affected by the wave of foreclosures that began in 2008—especially Polk County, which had experienced the highest growth rate in the region. After peaking in 2009-2010, the number of foreclosures declined in 2011, suggesting that the worst is over (see Figure 21). However, as of the 4th quarter of 2011, an estimated 44.2 percent of mortgaged homes in Florida have negative equity, whereby the amount owed exceeds the value of the home (also known as an "underwater" mortgage).[14]

Figure 21. Foreclosures Per Month in the 5-County Region, 2005-2011

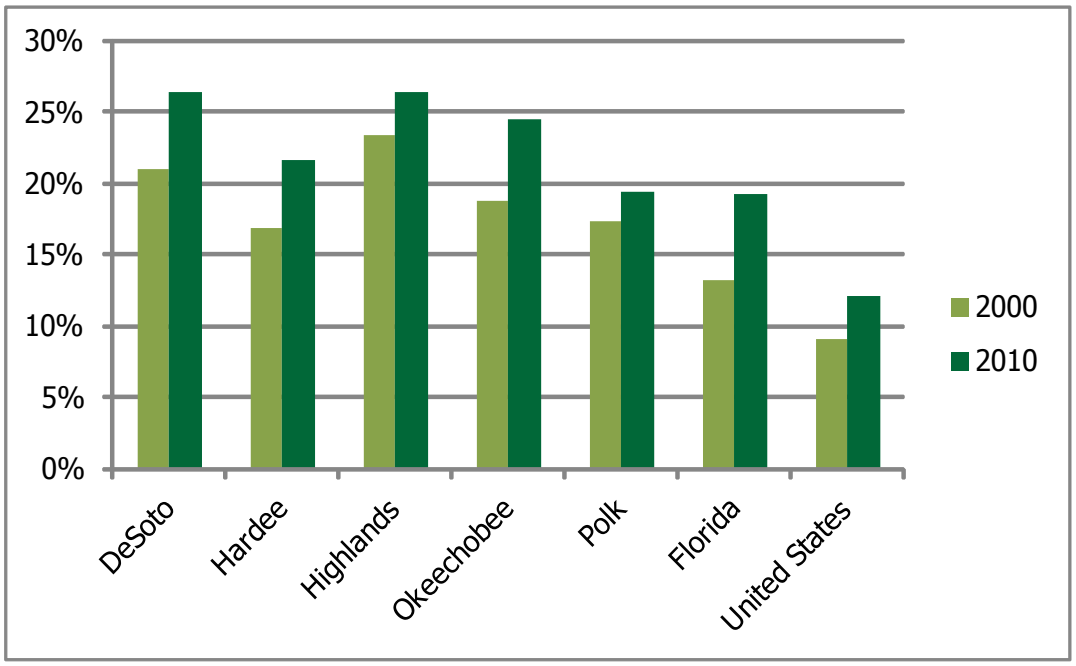


Source: Florida Economic Development Council

[14] CoreLogic Q4 2011 Negative Equity Report (retrieved Mar. 13,2012)

The rise in foreclosures was accompanied by an increase in vacant housing. From 2000 to 2010, the percentage of housing units that were vacant in the region increased from an average of 18 percent to 21 percent. All counties in the region have higher housing unit vacancy rates than the state or nation (see Figure 22).

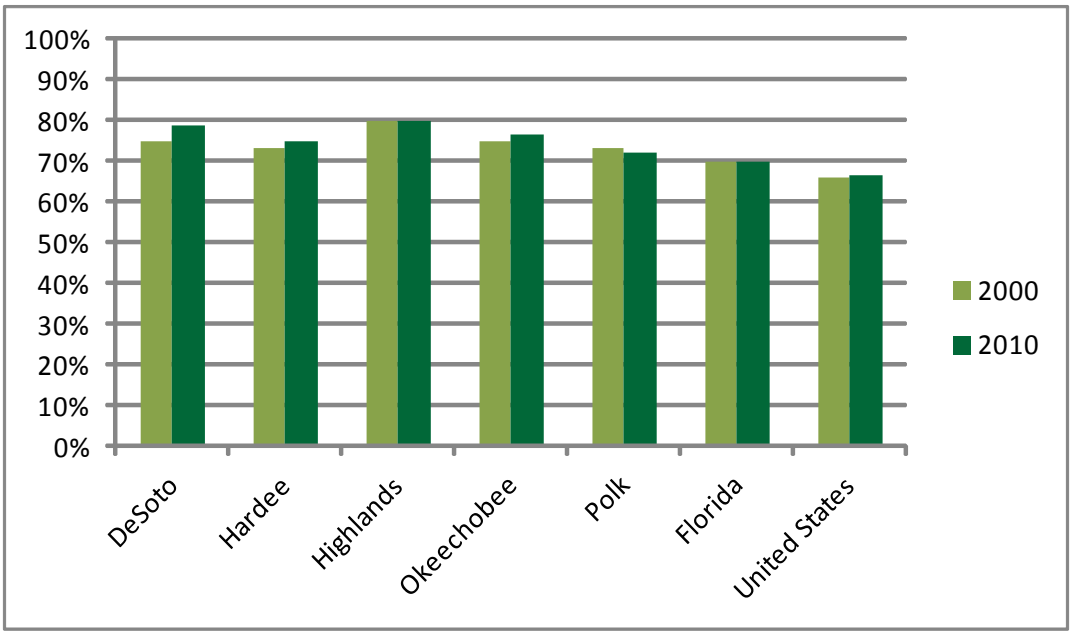
Figure 22. Percent of Housing Units that are Vacant



Source: U.S. Census Bureau

Despite the recent wave of foreclosures, the region maintains a higher rate of home ownership than the state or the nation. According to U.S. Census estimates for 2010, of the 296,055 occupied housing units in the region, 74 percent were owner-occupied (the remainder being renter-occupied), compared to 70 percent statewide and 67 percent nationally (see Figure 23).

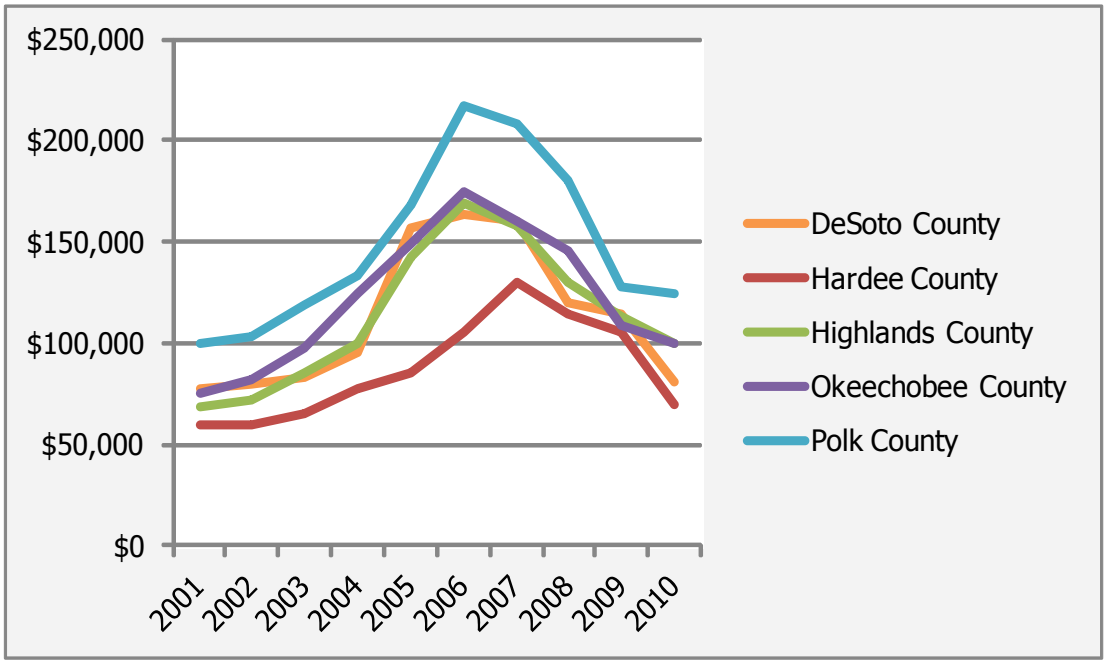
Figure 23. Percent of Housing Units that are Owner-Occupied, 2000-2010



Source: U.S. Census Bureau

Median home sale prices peaked in 2006 and 2007, then returned approximately to previous values (see Figure 24).

Figure 24. Median Home Sale Prices, 2001-2010



Source: Florida Housing Data Clearinghouse

STRATEGIC FINDINGS

The region had a steady increase in housing units from 2000 to 2010, with some being replacement units in 2005 for those destroyed in the 2004 hurricane season. Despite a wave of foreclosures and an increase in vacancies, the regional rate of homeownership exceeds the state and national rates. Table 17 summarizes the strategic findings for housing.

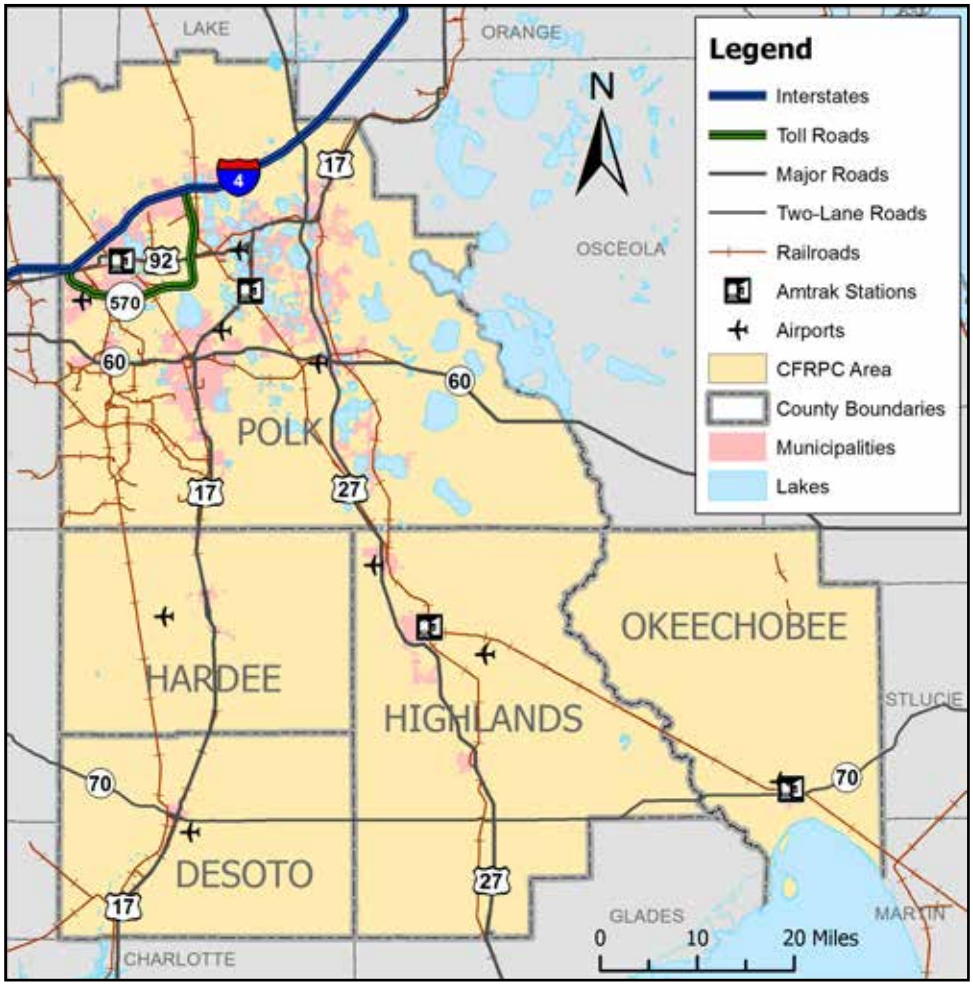
Table 17. Housing Strategic Findings

Strengths:	Weaknesses:
• Home ownership rates in the region are above the state and national rates.	• Home values have fallen. • Vacancy rates have increased.
Opportunities:	**Threats:**
• As home prices have fallen, housing has become more affordable in the region.	• A high percentage of mortgages in Florida are "underwater"; this is presumably true for the region as well. This could result in more foreclosures. • A large part of the region's population lives in mobile homes, which are more vulnerable to extreme weather events such as hurricanes.

Transportation

The region's transportation network is shown in Figure 25. The region has two major multi-lane north-south highways, US 27 and US 17, and three major multi-lane east-west highways, Interstate 4, US 92, and State Route 60. The transportation infrastructure in the northernmost part of the region reflects the more dense and urbanized nature of northern Polk County. This area includes the region's only interstate (I-4) and only toll road (State Route 570), which are also the only fully limited-access highways in the region. Most roads in the region's four southern counties (DeSoto, Hardee, Highlands, and Okeechobee) are two-lane, with the exception of US 27 and US 17. US 17 is four lanes with the exception of the section through Southern Hardee County to the DeSoto County line. The Florida Department of Transportation is currently working to widen US 17 to the DeSoto County line.

Figure 25. The Region's Transportation Network



Several freight rail lines run through the region, connecting to the Miami, Tampa Bay, Orlando, and Port Charlotte areas, as well as other areas. CSX is in the process of designing and permitting an integrated logistics center in the Winter Haven area, which will increase the region's status as a major intermodal transportation hub.

Additionally, the Florida Department of Transportation has been considering the possibility of a new transportation corridor that would pass through the region. Such a corridor would be multimodal, meaning that rail, transit, utilities, and other transportation services could be included within the corridor right-of-way.

There are currently no passenger airports within the region, although Lakeland Linder Regional Airport has had limited passenger service in the past and has potential for resuming passenger service. Regional air passengers typically use airports in the Tampa and Orlando areas, as well as Fort Myers and West Palm Beach. There are nine general public airports in the region, providing goods movement and private passenger travel. Several smaller private airport facilities are also located in the region. The public airports identified in the region are listed below.

DeSoto County:	Arcadia Municipal Airport
Hardee County:	Wauchula Municipal Airport
Highlands County:	Avon Park Executive Airport Sebring Regional Airport
Polk County:	Bartow Municipal Airport Lake Wales Municipal Airport Lakeland Linder Regional Airport Winter Haven's Gilbert Airport

Public transportation is provided in the urbanized areas of northern Polk County by Citrus Connection, serving Lakeland, Winter Haven, and Bartow. The system currently provides about 6,000 trips per day.[15] Paratransit services are provided for transportation disadvantaged persons in other areas.[16] Intercity passenger rail transportation is provided by Amtrak, servicing stations in Lakeland, Winter Haven, Sebring, and Okeechobee. Companies such as Greyhound also provide intercity bus service. There is also an extensive network of bike lanes (especially in the urbanized areas of northern Polk County) and multi-use trails, providing opportunities for non-motorized transportation.

According to 2010 Census estimates, 78.4 percent of workers aged 16 and older in the region get to work by driving alone; 13.0 percent carpool; 1.6 percent use public transit; 1.5 percent walk; 2.7 percent use other means (e.g. bicycle, motorcycle); and 3.0 percent work from home. A total of 5.6 percent of households have no motor vehicles available.

[15] Citrus Connection, "About Us." (retrieved March 7, 2012)
[16] Florida Commission for the Transportation Disadvantaged (retrieved March 7, 2012)

STRATEGIC FINDINGS

Although the current transportation infrastructure has some inadequacies, the region's central location within the Florida peninsula gives it high potential to grow as an intermodal transportation hub. Coordinating transportation planning with land use planning could improve local economies and quality of life. Table 18 summarizes the strategic findings for transportation.

Table 18. Transportation Strategic Findings

Strengths:	Weaknesses:
• The region includes transportation corridors of statewide importance (I-4, US 27) and has an extensive freight rail network. Parts of the region are as little as 30 miles from the Port of Tampa, 70 miles from Port Canaveral, and 125 miles from the Port of Miami.	• Some parts of the roadway network do not meet current transportation needs, and are subject to congestion. This can decrease the attractiveness of sites within the region for economic development.
Opportunities:	**Threats:**
• Future high-speed multimodal transportation corridors could pass through the region to connect new and existing employment centers.	• Most of the region's population depends on personal vehicles for transportation, making them vulnerable to rising gas prices.

Infrastructure

Potable Water and Wastewater Systems

Core infrastructures, such as wastewater systems, are not available in all parts of the region. Water systems that can provide and process large volumes of water are often high priorities for a wide range of businesses considering relocation. Many parts of the region currently do not have this capability and would need to build it as part of a major development project. The region is deficient in this critical area.

Potable water is generally available from the municipalities in the region for household use. Many of these municipal water systems are legacy systems that have been improved over time to provide a safe drinking water supply to residents. Several counties, including Hardee and Okeechobee, have constructed grant-funded water supply systems in designated industrial parks in order to provide an incentive for industry and business recruitment and growth. However, many agriculturally related businesses in the region, such as warehousing and distribution facilities, are still serviced by their own on-site systems.

Water scarcity presents a challenge for counties and municipalities that are endeavoring to recruit new businesses. Water supplies must be preserved and maintained for the future, while at the same time meeting current needs. Florida's water management districts are responsible for planning for these needs and regulating water use. The water management districts are currently working to improve consistency in the consumptive/water use permitting process in order to reduce confusion, streamline processes and promote equitable treatment for the regulated public. The water management districts are also working to determine whether the Floridan aquifer system has reached the sustainable limits of its use in portions of the central Florida area. This means that local governments and businesses must increasingly look to develop supplemental sources of water, including conservation measures, reclaimed water, brackish groundwater and surface water, to meet growing water demands. Although these alternative sources can be costly, the water management districts have cost-share programs available to offset the additional expense of developing these supplies.

Wastewater systems are available in limited capacities throughout the region from municipalities or as part of industrial park developments. Outside of municipalities, the region relies largely on on-site septic systems for wastewater treatment.

Electric and Gas

The electric utility industry is comprised of municipal, cooperative, and investor-owned utilities. A municipal system is governed by an elected city commission or an appointed or elected utility board, and operates as a non-profit. Capital is raised through operating revenues or sale of tax-exempt bonds.

Cooperatively owned utilities are formed through joint ventures organized for the purpose of supplying electricity to specified areas. Most cooperatives have been financed by the Rural Electrification Association and are governed by an elected board of directors.

Privately owned utilities, also known as investor-owned utilities, or IOUs, are governed by a board of directors elected by stockholders. Three IOUs operate within the Central Florida Regional Planning Council district, and all are regulated by the Florida Public Service Commission (PSC).

Municipal Utilities

City of Lakeland

Lakeland Electric, Florida's third-largest public power utility, provides electricity to approximately 120,000 customers and serves an area of roughly 255 square miles. Power is generated at Lakeland Electric's two main power plants, the 964-megawatt McIntosh Power Plant and the 143 megawatt Larsen Power Plant. The utility also operates a group of energy-efficient generating units capable of providing up to 50 megawatts of additional electricity when other units are out of service or during periods when demand for electricity is highest. The generating capacity of the production units owned by the City of Lakeland is 984 megawatts (MW). The most cost-effective unit in the generating fleet is the 365 MW McIntosh 3 coal unit, of which 60 percent (218 MW) is owned by Lakeland Electric and 40 percent by Orlando Utilities. During the past five years, Lakeland Electric has also placed a 350 MW combined cycle natural gas unit and a 50 MW internal combustion peaking facility into service. Lakeland Electric has sufficient generation and transmission capacity to cover its projected load requirements for at least the next five years.

City of Bartow

The City of Bartow owns its power lines, maintains them with its own line crews, and distributes grid power purchased from Progress Energy. The City is currently responsible for 6 substations within a 111-square-mile service territory. The Electric Department maintains approximately 11,000 electric meters.[17]

City of Fort Meade

The City of Fort Meade owns its power lines, maintains them with its own line crews, and distributes grid power purchased from Florida Municipal Power. Effective January 2008, the City has a 30-year contract with Florida Municipal Power, whereby the utility will be the sole electric power provider.

City of Wauchula

The City of Wauchula owns its power lines, maintains them with its own line crews, and distributes grid power purchased from Florida Power & Light.

Rural Electric Cooperatives

After the creation of the Rural Electric Program by Congress in 1935, cooperatives across the nation organized to bring affordable electric power to residences and smaller communities that were previously too remote to make service feasible. There are three cooperatives within the Central Florida Regional Planning Council area: Peace River Electric Cooperative, Glades Electric Cooperative, and Peace Withlacoochee Electric Cooperative.

[17] City of Bartow "Metering Division" (retrieved March 12, 2012)

Peace River Electric Cooperative (PRECO)

PRECO is a locally-owned, locally-controlled electric distribution utility that operates as a not-for-profit cooperative. The company provides electric service to residential, business, and light industrial customers in DeSoto, Hardee, Highlands, and Polk counties. PRECO's headquarters is located in Wauchula and there is a district office in Indian Lake Estates in Polk County. PRECO currently maintains nearly 4,000 miles of energized underground and overhead power lines across its system. It is an electric distribution system; it does not generate its own electricity. PRECO buys its wholesale electricity from Seminole Electric Cooperative (SEC), which is a generation and transmission cooperative headquartered in Tampa. SEC's primary generating facility is located on the St. Johns River in Putnam County, about 50 miles south of Jacksonville. It consists of two 625-megawatt coal-fired units. SEC has a combustion turbine 500 megawatt plant in Hardee County; it owns 4.4 megawatts of Crystal River 3 Nuclear Plant and has long term capacity and reserve contracts with other electric generating companies. SEC is also building a peaking plant in Hardee County and a 600 MW coal unit in Palatka.

Glades Electric Cooperative

Glades Electric Cooperative, Inc. serves approximately 15,000 consumers in Highlands, Okeechobee, Glades, and Hendry Counties. More than 2,224 miles of lines deliver over 341 million kilowatt hours to a customer base that consists of 52 percent residential and 48 percent commercial/industrial power consumers. Glades Electric Cooperative purchases wholesale power from Seminole Electric Cooperative.

Withlacoochee Electric Cooperative

A small portion of this cooperative's service area, in northwestern Polk County, is within the Central Florida Regional Planning Council's district. It purchases wholesale power from Seminole Electric Cooperative.

Investor-Owned Electric Utilities

Tampa Electric Company (TECO)

TECO has supplied the Tampa Bay area with electricity since 1899. Its service area covers 2,000 square miles in west Central Florida, including the north half and west half of Polk county. The company has 4,400 megawatts of generating capacity and over 645,000 residential, commercial, and industrial customers. Tampa Electric is the principal subsidiary of TECO Energy, Inc. and is a regulated utility with both electric and gas divisions (Tampa Electric and Peoples Gas System).

Progress Energy

Progress Energy's retail service area spans approximately 20,000 square miles in Central Florida. The company maintains more than 43,600 miles of distribution and transmission lines, serving 1.5 million customers and a population of more than 5 million people. Over the last 20 years, more than 600,000 new customers have moved into the company's service area. On average, an additional 30,000 to 40,000 customers move into the service area each year. Progress Energy's system of electric generation includes more than 21,000 megawatts of capacity at 32 sites in the Carolinas and Florida. The company has generating plants that are generally located in the Avon Park, Bartow, Tampa Bay and Fort Meade areas.

Florida Power & Light (FPL)

FPL serves more than 4.4 million homes and businesses in 35 Florida counties, including parts of Hardee, DeSoto, Highlands, and Okeechobee Counties, and generates electricity at 14 different power plant sites throughout Florida and Georgia. Including generating units and power purchases by FPL, the company has nearly 24,000 megawatts of resources to serve customers, including a required 20 percent reserve margin. The company is projecting an average increase of approximately 85,000 new customer accounts annually for the next 15 years.

Natural Gas Utilities

There are three natural gas companies serving the counties within the Central Florida Regional Planning Council area. Natural gas is transported to Florida customers through two major interstate pipelines: Florida Gas Transmission (FGT) and Gulf Stream Natural Gas System. FGT pipelines run through Polk, Hardee, DeSoto, and Highlands counties. Gulf Stream Natural Gas System pipelines run though Polk, Hardee, Highlands, and Okeechobee counties.

Central Florida Gas Company (Chesapeake Utilities Corp.)

Central Florida Gas Company is an investor-owned company that serves most of Polk County and all of DeSoto County. In 2005, the utility had 12,760 firm transportation service customers.

People's Gas System

People's Gas System is an investor-owned company and TECO Energy business that has limited service in northwest and southeast Polk County and northwest Highlands County.

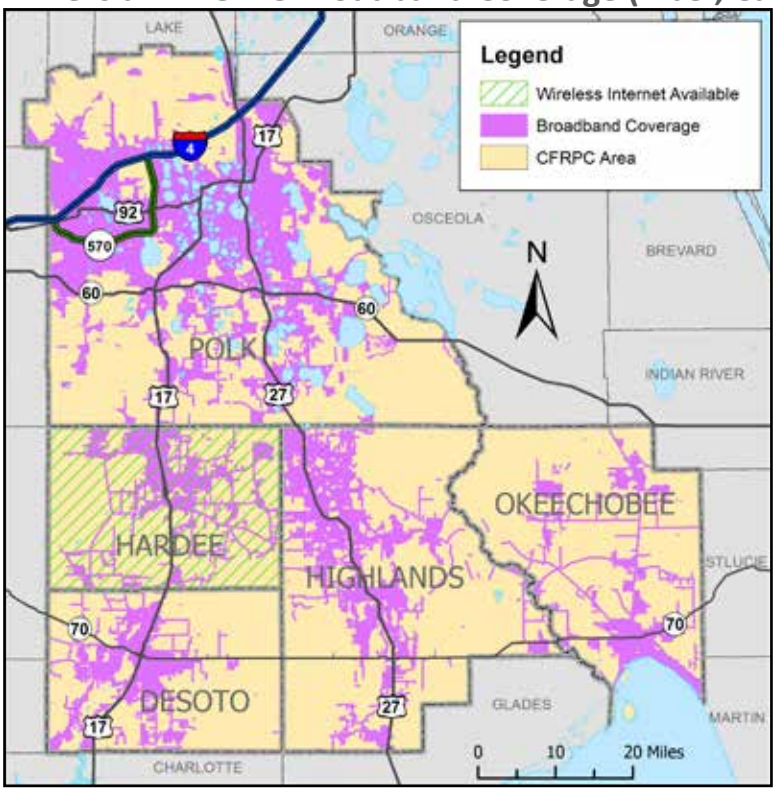
Sebring Gas System

Sebring Gas System, Inc. is an investor-owned company that serves a limited area within the northwest section of Highlands County.

Broadband

High-speed wired internet service (via fiber optic, cable, or DSL) is generally available within the region's more densely populated areas (see Figure 26). In addition, mobile wireless coverage (for smartphones, tablet computers, and other mobile devices) is available throughout almost the entire region. In Hardee County, fixed wireless ("Wi-Fi") internet service is available to homes and businesses countywide due to the local/public/private funding partnership Hardee Broadband Project.[18] FHREDI (Florida's Heartland Regional Economic Development Initiative) is responsible for a broadband planning effort including DeSoto, Glades, Hardee, Hendry, Highlands, and Okeechobee Counties.

Figure 26. Commercial Wireline Broadband Coverage (Fiber, Cable, and DSL)



Source: NTIA

[18] WiMAX360 "Hardee County Broadband Project" (retrieved March 13, 2012)

Communities and regions that develop their broadband infrastructure have better, faster access to new ideas, innovations, and technologies. The Central Florida Regional Planning Council is currently developing a broadband planning toolkit concurrently with a broadband plan for Polk County. Broadband planning efforts by FRBA (the Florida Rural Broadband Alliance) are addressing the broadband needs of DeSoto, Highlands, and Okeechobee Counties.

Broadband access is provided by several private companies in the region, including Bright House Networks, Comcast, and Verizon. The cities of Bartow, Lakeland, and Winter Haven own municipal fiber optic networks that are used to connect city facilities. Several long-haul fiber optic lines run through the region, connecting to Tampa, Orlando, Miami, and other areas.

STRATEGIC FINDINGS:

The Region's infrastructure would require upgrading in order to support certain economic development activities. Table 19 summarizes the strategic findings for infrastructure.

Table 19. Infrastructure Strategic Findings

Strengths:	Weaknesses:
• Traditional technological infrastructure has not been widely developed; therefore, there is no bias to maintain older systems in favor of new and emerging technologies.	• Utility systems throughout the region are underfunded and underdeveloped.
Opportunities:	**Threats:**
• Slower development of land allows local governments to plan appropriately for land use, utilities, and transportation infrastructure to meet the needs of future economic and population growth. • Expanded broadband availability will make the region attractive to new businesses.	• Emerging technologies may be delayed, resulting in a status-quo environment for growth of infrastructure and services. • Too much development may negatively impact the natural resources of the region. • Annexation of large tracts of land by municipalities can lead to high infrastructure-related costs that are not offset by new revenues.

CEDS Goals and Objectives

Talent Supply & Education

Goal 1 - Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.

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

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

Goal 2 - Ensure educational systems and workforce training to support innovation and creativity.

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

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

Innovation & Economic Development

Goal 1 – Provide funding for ongoing economic development activities.

Objective: Establish funding mechanisms for ongoing economic development activities.

Goal 2 - Provide technical assistance and use new technology to promote job growth.

Objective: Develop technical assistance programs to support new technology.

Goal 3 – Build seamless information technology infrastructure.

Objective: Develop projects that support information technology infrastructure.

Goal 4 - Support location of bio-medical life science facilities consistent with the Catalyst Project.

Objective: Complete all infrastructures necessary to support the Catalyst project.

Objective: Expand the number of key educational resources and medical support staff to build support for a global medical treatment center.

Goal 5 - Encourage alternative energy and green product industries.

Objective: Use clean energy to drive economic development and increase energy related employment.

Objective: Export power produced by renewable energy in the region to the state's coastal grids.

Infrastructure & Growth Leadership

Goal 1 - Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment.

Objective: Establish hubs for global, national, and state distribution through development and implementation of a multimodal, interconnected transportation system in the region.

Objective: Ensure that growth and infrastructure are planned with natural resources protection.

Goal 2 – Develop a strong export economy.

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

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

Business Climate & Competitiveness

Goal 1 - Encourage local governments to adopt streamlined development approval procedures.

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

Goal 2 - Create a regional data collection repository by industry and county.

Objective: Monitor CEDS Performance Measures.

Goal 3 - Develop projects and programs that support existing and new business.

Objective: Develop vertical and horizontal integration of key industries, including expanding manufacturing and research in the region.

Goal 4 - Increase investment in business development and placement in the region.

Objective: Establish a public education structure in the region to promote public involvement in agriculture.

Civic & Governance Systems

Goal 1 - Improve coordination of economic development, land use, infrastructure, water and natural resource decision making.

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

Objective: Collaborate to improve emergency and non-emergency medical transportation, retain and expand existing healthcare facilities specifically in rural areas, and provide incentives to attract healthcare providers (physicians and facilities).

Goal 2 - Improve public/private/civic cooperation, collaboration, and communication of the Region's economic strategies.

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

Quality of Life & Quality Places

Goal 1 - Protect natural resources to support quality environment and eco-tourism.

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

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

Goal 2 - Develop projects that improve the region's quality of life.

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

Objective: Ensure access to high quality health care, including primary, specialty, and ancillary services.

Plan of Action

The Central Florida Economic Development District will coordinate CEDS projects and activities with county economic development entities in the region and state and other appropriate agencies and entities. In addition, staff will assist in project development by providing technical assistance in grant preparation, needs analysis, site selection, and intergovernmental and public coordination of activities. The plan of action implements the goals and objectives of the CEDS in a manner that cooperates and aligns the CEDS with the State's economic development priorities.

The following actions shall occur:

- The CEDS Committee shall meet quarterly to monitor status of regional projects;
- The CFRPC shall monitor status of regional coordination;
- The CFRPC shall report on performance measures;
- The CFRPC and CEDS Committee will develop new regional projects;
- County Economic Development staff, FHREDI, CFDC and Workforce staff shall track key indicators; and
- The CFRPC shall convene meetings, compile project status and report to EDA.

Central Florida Economic Development District staff will continue to coordinate the CEDS plans by participating in the economic development activities in the region, as well as locally and on statewide levels; and by fostering public-private partnerships.

The Heartland 2060 Regional Vision will continue to coordinate between State and Federal initiatives and encourage regional collaboration. The Year of Economic Engagement and Alignment will include continued partnerships between the CFRPC, FHREDI, Heartland Workforce, Polk Vision, and the Heartland 2060 Consortium. During this time, the following actions shall occur:

- Alignment between State, Regional, and Local Plans
- Completion of the Five-Year Strategic Action Plan for Heartland 2060, and
- Commencement of the implementation of CEDS strategies.

Table 20 provides strategies for the plan of action.

Table 20. Strategies

Talent Supply & Education
• Establish career exploration programs and partnerships between public and private sectors in the Region's public schools • Expand access to adult education and alternative learning • Expand Science, Technology, Engineering, Mathematics (STEM) Education Programs in the region's Public Schools
Innovation & Economic Development
• Encourage a Mixed Use land use category supporting development regulations in developable areas along transportation corridors • Pursue focused economic development strategies developing the Region as a major competitive logistics and distribution hub by expanding multimodal connectivity • Support opportunities to stimulate economic development through assessment, cleanup, and reuse of Brownfields properties
Infrastructure & Growth Leadership
• Increase the number of critical conservation areas in public or private management through incentives and other funding mechanisms • Utilize viable alternative water sources for public supply needs • Reduce water consumption through incentives, education and innovative techniques • Establish a regional framework and vision • Identify sustainable revenue sources for maintenance and expansion of regional transportation systems
Business Climate & Competitiveness
• Increase agricultural domestic and international export markets • Establish the Region's target industries with supporting educational and lifestyle resources and infrastructure in place
Civic & Governance Systems
• Participate in a regional organization to promote the development of alternative energy production • Streamline alternative energy planning and permitting within governments in the Region
Quality of Life & Quality Places
• Restore function to preservation and conservation areas through natural resource management mechanisms and land development policies • Provide full service hospitals within a reasonable distance to the Region's residents to provide immediate life saving services • Increase the proportion of the Region's population that resides within 10 minutes of regional employment centers • Affordable attainable housing will be available throughout the Region

Economic Resilience

The ability for our region to recover, or prevent damage, from man-made or natural disasters is a measure of our economic resilience. While Florida is at risk to experience any number of man-made or natural disasters, historically, tropical storms and hurricanes pose the most significant threat to the people of Florida and their economy. Tropical storms and hurricanes, depending upon intensity, can impact Florida with high winds, torrential rain, flooding, tornados, and the interruption of critical infrastructure systems such as electricity, roadways, potable water supply, and emergency services.

While coastal regions focus much of their tropical storm and hurricane preparedness efforts around storm surge and coastal flooding, the Central Florida region has uniquely different needs. Having no oceanic coast line, damage from hurricanes impacting the Central Florida region is generally caused by the combination of torrential rainfall and high winds. This combination results in a significant number of downed trees causing damage to homes, automobiles and power lines.

Freshwater flooding poses a significant threat during tropical storms and hurricanes. The Central Florida region is home to many rivers and streams, hundreds of named lakes, and significant land area below the 100 year flood zone. Any structures constructed near or within the flood zone are at risk during a major storm event.

Additionally, according to the 2015 Florida Statewide Regional Evacuation Study Program, the Central Florida region has approximately 176,157 people living in approximately 76,056 mobile homes. Mobile homes, particularly those constructed prior to 1978, are at higher risk of severe damage from high winds, flooding, and downed trees than site-built homes because they are constructed according to less stringent standards.

During a coastal hurricane event the Central Florida region must be prepared to endure the impacts of a large, short or moderate term, influx of temporary residents migrating inland to seek shelter during a coastal evacuation. The region must be able to provide adequate shelter and services to these evacuees. The region must also be able to provide temporary housing to its residents whose homes may have been lost or damaged. The region must possess the ability to get permanent housing and transportation options online as soon as possible so as to minimize the negative impacts on the local economy.

SWOT Findings

Strengths:

- The region is entirely inland with no threat of coastal flooding, unlike the remainder of the State of Florida.
- Efficient and effective evacuation routes are present throughout the region including Interstate 4, US 17, US 98, US 441, US 27, SR 60, and SR 70, most of which are multi-lane roadways.

Weaknesses:

- Large areas of rural population with potentially slower emergency response times.
- Vulnerable housing such as mobile homes, which are at risk during a significant storm event.

Opportunities:

- Short term boost in economic activities during coastal hurricane events due to influx of coastal residents seeking shelter inland.

Threats:

- Older and potentially substandard infrastructure, particularly within the Rural Areas of Economic Opportunity, including potable water systems, storm water systems, and/or septic tanks in flooded areas.
- Damage to local and high voltage transmission lines, and electric substations.
- Loss of broadband capability, which impacts operations of businesses.
- Loss of housing and infrastructure, which negatively impact local economy.

Resiliency Goals

- Maintain regional evacuation plans and assist local governments with evacuation plans.
- Maintain regional economic resilience strategies to mitigate adverse impacts to local economy as the result of housing and infrastructure loss (including broadband) due to a significant storm event, and assist local governments with economic resilience strategies.
- Develop and maintain strategies for:
  - » Providing short-term emergency shelters;
  - » Providing longer-term temporary housing;
  - » Providing more rental units for coastal evacuees who do not seek emergency shelter (which will also support ecotourism in more rural areas of the region).

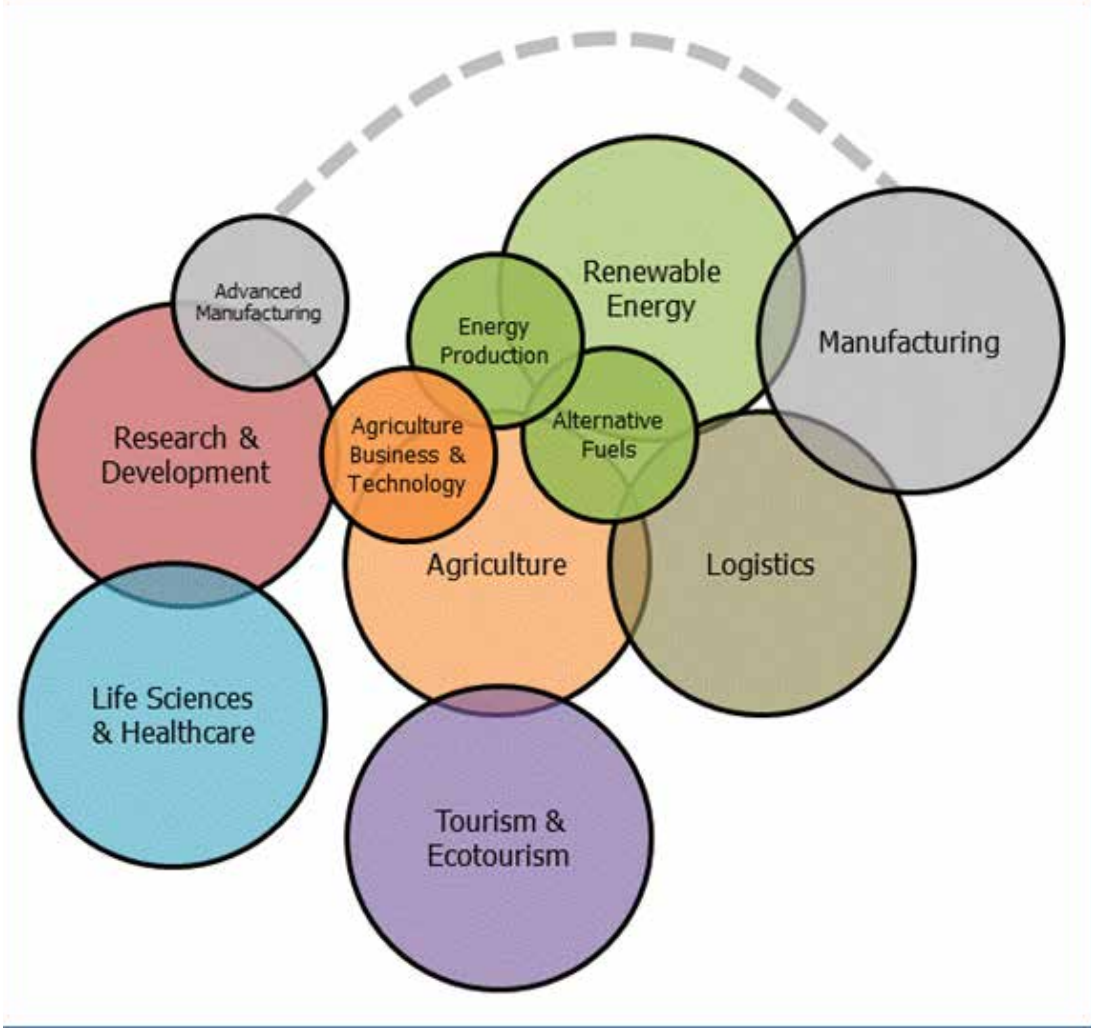
Target Clusters

The CEDS Committee has recommended the following 7 target clusters and 4 sub-clusters for the 2012 CEDS:

- Agriculture
  - » Agriculture Business & Technology
- Life Sciences & Healthcare
- Logistics
- Manufacturing
  - » Advanced Manufacturing
- Renewable Energy
  - » Alternative Fuels
  - » Energy Production
- Research & Development
- Tourism & Ecotourism

Figure 27 shows the relationships between target clusters, with the overlapping circles indicating those clusters that are significantly interconnected. This section provides a brief overview of each cluster and of the principal connections between clusters.

Figure 27. Target Clusters



Agriculture

Agriculture is one of the traditional industries of the region. The primary industries are citrus and cattle farming. As of 2011, the region was estimated to contain 482,000 head of cattle[19] and 262,328 acres devoted to citrus farming.[20] Because of the need to transport the products of the region's agricultural industries to a global market, agriculture is closely linked to Logistics.

In addition, agriculture overlaps with the sub-clusters of Energy Production and Alternative Fuels. Examples of the use of agriculture to produce energy in the region include the EcoGen biomass plant in Polk County[21] and the EnviroFuels ethanol plant in Highlands County. [22]

This cluster also contains the sub-cluster of Agriculture Business and Technology. As agricultural technologies continue to develop, new opportunities to improve the efficiency, productivity, and sustainability of agriculture will arise. This sub-cluster overlaps with another target cluster, Research and Development, and also with the sub-cluster of Alternative Fuels, since new fuel technologies are likely to play an important role in the development of improved agricultural technologies.

Finally, the region's agricultural heritage and resources present opportunities in the target cluster of Tourism and Ecotourism. Examples include the Lake Placid Tower in Highlands County, originally built for the observation of the surrounding citrus groves, and many attractions relating to the cattle industry, such as the rodeos in DeSoto, Okeechobee, and Polk Counties.

Life Sciences & Health Care

Life Sciences and Health Care stand to see strong gains in the region. There is a growing healthcare industry fueled by rising health care costs[23] combined with an increasing senior population.[24] There are ten hospitals in the region: five in Polk County, two in Highlands County, and one each in DeSoto, Hardee, and Okeechobee Counties. In addition, the Florida Institute for Neurological Rehabilitation, located in Wauchula, is the largest private employer in Hardee County.[25] This industry cluster overlaps with the Research & Development industry cluster because of the close connection between the life sciences and the research and development of new technologies.

Logistics

The region is gaining importance in the field of Logistics. Two major transportation corridors pass through the region: US Route 27, a major highway connecting the Miami area to the Orlando area; and Interstate 4 in the far north of the Region. With the opening of the new CSX Integrated Logistics Center in Winter Haven and the potential Americas Gateway Logistics Center south of the region in Glades County, the region has the potential to become a major logistics hub. The Logistics industry is intertwined with the Agriculture and Manufacturing industry clusters, both of which require transportation of both input and output materials. Because the transportation of resources requires energy, Logistics also overlaps with the Renewable Energy cluster.

Manufacturing

Although employment in Manufacturing has declined in the region in recent years, this remains a key cluster. Since manufacturing requires energy for the production of goods, this cluster overlaps with Renewable Energy and the sub-cluster of Energy Production. Since the input materials and end products of manufacturing must be transported, this cluster also overlaps with Logistics. The Advanced Manufacturing sub-cluster overlaps with the Research and Development cluster.

[19] United States Department of Agriculture, National Agricultural Statistics Service. "Livestock County Estimates." (July 26, 2012).
[20] United States Department of Agriculture, National Agricultural Statistics Service. "Citrus County Estimates." (retrieved July 26, 2012).
[21] Biomass Magazine (Sept. 26, 2011). "U.S. EcoGen plans 60 MW Florida biomass power plant." (retrieved July 11, 2012).
[22] US Envirofuels, "Projects." (retrieved July 11, 2012).
[23] Florida Center for Health Information and Policy Analysis. May 2012 Statistical Brief: "Florida Health Care Expenditures in 2010." (retrieved July 26, 2012).
[24] Office of Economic and Demographic Research. "Florida's Economic Future & the Impact of Aging in Place." (retrieved July 26, 2012).
[25] Enterprise Florida. "Hardee County Profile." (retrieved July 27, 2012).

Renewable Energy

The Renewable Energy cluster includes two sub-clusters: Energy Production and Alternative Fuels. The region has considerable potential for the production of solar energy given the area's many annual hours of sunshine (Lakeland, for example, has an annual average of 2,923 hours of sunshine[26]). Other renewable energy projects in the region include biomass electricity production, ethanol production, and biofuels development. Because of the large amounts of energy inherently required by Logistics and Manufacturing, both these clusters overlap with Renewable Energy.

Research & Development

Research & Development is a budding industry in the region. Significant regional assets include the Polk Commerce Center, a 2,500-acre mixed use development near Auburndale in Polk County,[27] and the new Florida Polytechnic University campus, currently under construction near the intersection of Interstate 4 and the Polk Parkway. Other notable institutions are the Florida Industrial and Phosphate Research Institute in Polk County and Archbold Expeditions, an ecological research organization in Highlands County. Research & Development overlaps with the Life Sciences & Healthcare cluster because of the close connection between the life sciences and the research and development of new technologies, and with the Agriculture Business & Technology sub-cluster because of the importance of new agricultural technologies for improving the efficiency and sustainability of agricultural industries.

Tourism & Ecotourism

Peninsular Florida contains many tourist attractions of global significance, principally in the Orlando area. The region's most prominent tourism sites include Legoland Florida and Bok Tower Gardens in Polk County. In addition, the region's unique natural features and large amounts of open space offer great potential for ecotourism. The Lake Wales Ridge, running through Highlands and Polk Counties, is home to a globally unique ecosystem including several species of endangered plants.[28] Archbold Biological Station in Highlands County is an ecological research institution primarily focused on the organisms and environments of Lake Wales Ridge.[29] The station offers exhibits, tours, and educational opportunities.

There are eight state parks in the region and several large county and city parks, as well as lands owned by the Water Management Districts that are open for recreation. Some parks and nature preserves on former phosphate mining sites (for example, Saddle Creek Park and Mosaic Peace River Park in Polk County) exhibit unusual topographical features that are conducive to hiking. There is one major navigable waterway (the Kissimmee River) and several areas that are popular for canoeing, most notably the Peace River. The Florida Atlas of Lakes[30] project currently lists 558 lakes in the Region; these lakes offer a wide range of recreational opportunities. The region also borders Lake Okeechobee, in southern Okeechobee County, the largest lake in Florida and the second largest freshwater lake contained entirely within the lower 48 states.

There are excellent opportunities for bird watching throughout the region, including 21 locations that are part of the Great Florida Birding Trail.[31] Sought-after birds that are relatively plentiful in the region include the bald eagle, roseate spoonbill, swallow-tailed kite, and limpkin.

The region's scenery and low-traffic back roads make it a popular destination for bicycle touring and racing. The region is home to major competitive cycling events such as the Chain of Lakes Cycling Classic[32] and cycling organizations such as Highlands Pedalers[33] and the Polk Area Biking Association.[34]

[26] National Oceanic and Atmospheric Administration. "Element 15: Sunshine." (retrieved July 26, 2012).
[27] The Lakeland Ledger, "Development Plan Presented, Centered Around Long-Awaited Polk Commerce Center." (retrieved July 26, 2012).
[28] US Fish and Wildlife Service. "Lake Wales Ridge NWR." (retrieved July 26, 2012).
[29] Archbold Biological Station, "About Us." (retrieved July 27, 2012).
[30] University of South Florida. "Florida Atlas of Lakes." (retrieved July 27, 2012).
[31] Florida Fish and Wildlife Conservation Commission. "Great Florida Birding Trail." (retrieved July 27, 2012).
[32] Chain of Lakes Cycling Classic. (retrieved July 27, 2012).
[33] Highlands Pedalers. (retrieved July 27, 2012).
[34] Polk Area Biking Association. (retrieved July 27, 2012).

The Tourism & Ecotourism industry cluster overlaps with the Agriculture cluster because of the opportunities presented by the Region's agricultural heritage and resources; for example, the region hosts regular rodeos and is home to a number of ranch resorts, connected to the cattle industry.

Key Projects

Table 21 shows the Key Projects and their related Target Clusters identified in the CFRPC region.

Table 21. Key Projects

Name	Cluster
RACEC Catalyst Project	Life Sciences & Healthcare
Guy Harvey Outpost	Tourism and Ecotourism
Americas Gateway	Logistics
Polk Gateway (CSX)	Logistics

RACEC Catalyst Project

The purpose of the RACEC (Rural Area of Critical Economic Concern) Catalyst Project is to target future industries, locate regional catalyst sites, and improve the sites to meet industry or target company needs, making each site a credible economic asset. Sites must be shovel-ready, infrastructure-ready, and readily developable. The Sebring Regional Airport and Commerce Park property was selected as a catalyst site, and is undergoing infrastructure installations for the construction of a 100-acre medical complex to be located in an adjacent 2,000-acres business campus.

In addition, the Sebring Airport runway extension will reduce or eliminate load limitations experienced by current users, accommodate the aircraft that are forecast in the most recent Airport Master Plan update, and allow the airport to be marketed to larger aircraft users in the area that are currently constrained by the existing runway configuration. The current runway length of 5,224 feet limits payload and/or usable fuel loads; the length will be extended by 1,476 feet.

Guy Harvey Outpost (Tourism and Eco-Tourism)

The Guy Harvey Outpost is a planned eco-friendly outpost development (redevelopment of the Okee-Tantie campground and marina) to include resort amenities such as beach lagoon, docks, boat slips, cabins, pool and sports amenities, marina, restaurant, and RV pads. The 112-acre complex is located on the north shore of Lake Okeechobee where the Kissimmee River meets the Lake. The development will support the tourism and eco-tourism cluster in the Region.

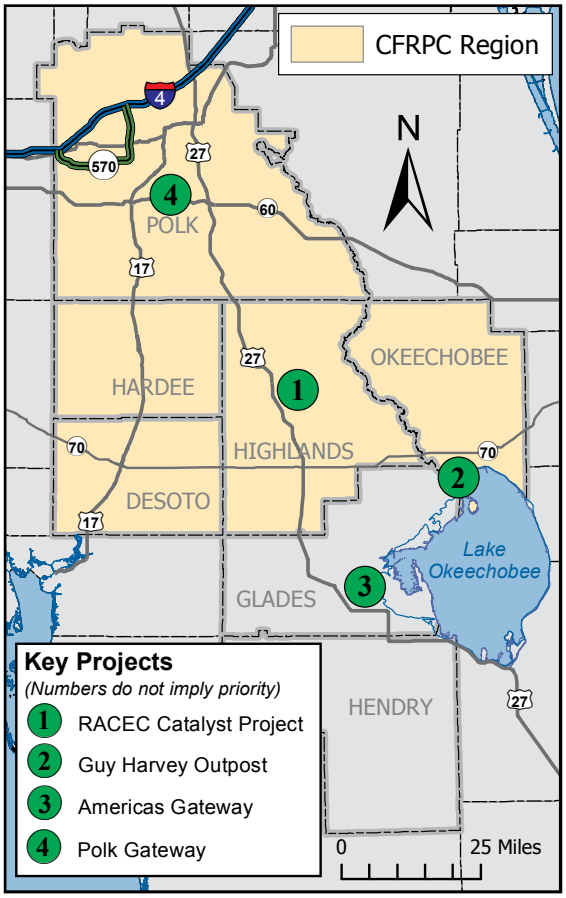
Americas Gateway (Logistics)

Americas Gateway Logistics Center will be a master-planned, mixed-use, integrated logistics center offering advanced manufacturing, distribution centers, an intermodal center, and other transportation/logistics- and service-related facilities. It will be located on a 6,700-acre site near Moore Haven in Glades County, owned by Lykes Brothers, Inc. and A. Duda & Sons, Inc.

Polk Gateway (Logistics)

The Gateway Area in Polk County centers around the new CSX Integrated Logistics Center currently under construction. This area encompasses property lying north and south of State Road 60 in the Cities of Winter Haven and Bartow as well as unincorporated Polk County. Properties include Clear Springs, a sector plan with approved industrial and research and development entitlements for over 17,000,000 square feet. It also includes land area inclusive of the City of Bartow and the City of Lake Wales Industrial Parks to support the ILC and the Stokes property, with over 1,800 acres of industrial and business park future land use that lies within this key logistics center area.

Figure 28. Key Projects Map



Opportunities

Hardee County Commerce Park

The Hardee County Commerce Park is a 264-acre shovel-ready commercial/light industrial incentivized development located in north central Hardee County. It is fully supplied with all utilities, including broadband connectivity and developable construction sites. It is managed by the Hardee County Industrial Development Authority. In addition, a separate off-site facility, the Hardee Technology Park, is being developed two miles south of the Commerce Park on US Route 17 for the purpose of expanding technology opportunities in the region.

DeSoto County G. Pierce Wood Memorial Hospital Complex/Business Park

The former G. Pierce Wood Memorial Hospital Complex in DeSoto County consists of 803 acres with approximately 80 existing buildings, air hangers, and a Federal Aviation Administration (FAA) permitted grass air-strip. The property was formerly a federal air base, and subsequently a mental health facility and juvenile justice facility; the latter closed in 2011. Site visits were conducted by FHREDI, the DeSoto County EDO, and the University of South Florida Polytechnic in an effort to develop a list of appropriate uses and private interest in the site's redevelopment. Preliminary marketing plans are being developed, and further legislative initiatives are anticipated with regard to the site's long-term use.

Sebring Regional Airport and Commerce Park

The RACEC Catalyst Site at the Sebring Regional Airport and Commerce Park includes the Sebring Foreign-Trade Zone (FTZ no. 215). Foreign-Trade Zones have a unique legal structure that allows them to be outside U.S. Customs territory while being within U.S. borders. Through tax savings, this can maintain and stimulate job growth and investment in the region as opposed to abroad. The 1,893-acre Sebring Regional Airport and Commerce Park complex was approved as an FTZ in 1996. The complex includes a fuel tank farm, adjacent industrial park, and Sebring International Raceway.

Figure 29. Opportunities Map

TECHNICAL REPORT

Analysis of Economic Development Problems and Opportunities

Talent Supply and Education

Average Annual Wage

Average annual wages in the region have increased slightly over the past decade, with four of the five counties experiencing a significant increase from 2012 to 2013. However, wages in all five counties in the region remain significantly below the State and National averages.

Each of the five counties saw an increase in real annual wages over the decade, as shown in Figure 30.

Figure 30. Average Annual Wages

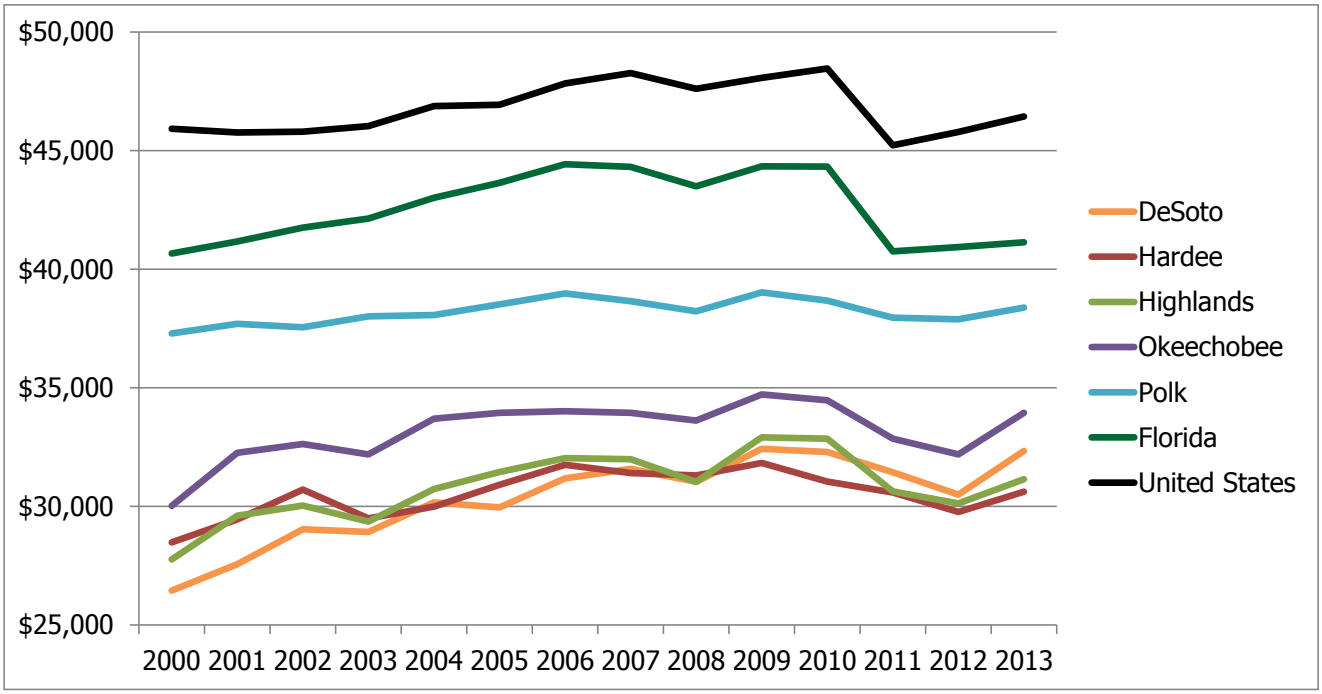


Table 22 shows the importance of adjusting for inflation by comparing the average nominal wage each year, region-wide, with the wage measured in 2010 dollars.

Table 22. Nominal and Real Wages, 5-County Region, 2000-2010

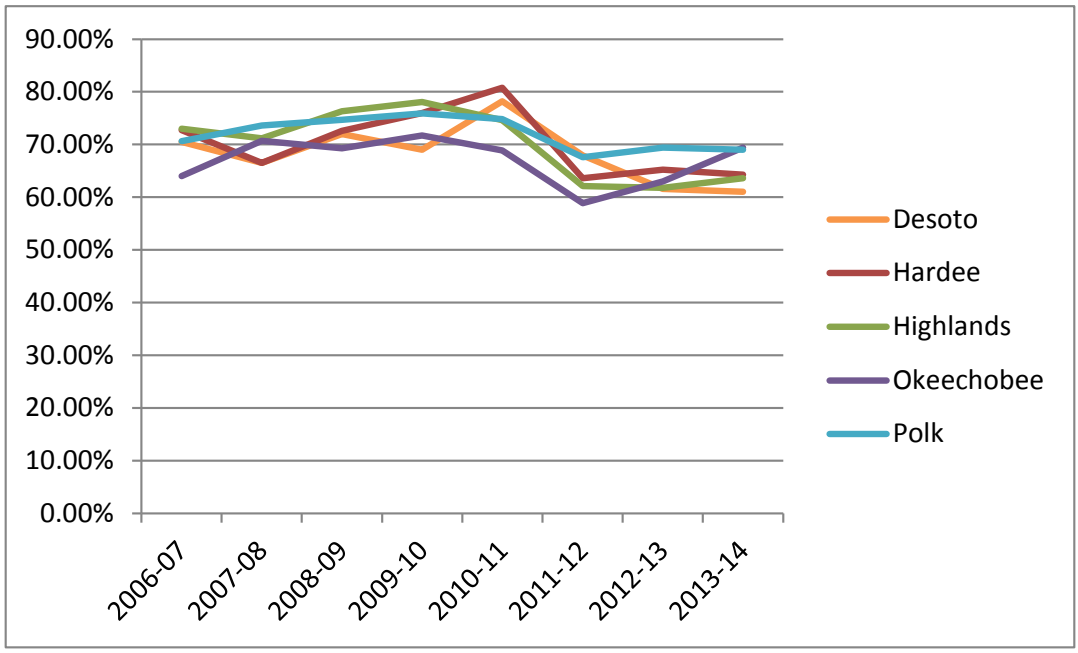
Year	Average Wage Per Job (Nominal)	Average Wage Per Job (2010 Dollars)
2000	$26,921	$34,190
2001	$28,314	$34,826
2002	$28,810	$34,861
2003	$29,659	$35,294
2004	$30,716	$35,323
2005	$32,204	$36,068
2006	$33,500	$36,180
2007	$34,490	$36,215
2008	$35,354	$35,708
2009	$35,911	$36,629
2010	$36,288	$36,288

Sources: U.S. Department of Commerce, Bureau of Economic Analysis, ES202 & Inflation Adjustment: Bureau of Labor Statistics CPI Calculator

High School Graduation Rates

Public high school graduation rates dropped significantly from the 2010-2011 school year to the 2011-2012 school year. Four of the five counties in the region have graduation rates that have remained fairly consistant over the last three school years. However, Okeechobee county had steadily improved.

Figure 31. High School Graduation Rates, 2006-07 to 2013-14 School Years



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

8th Grade Math Performance

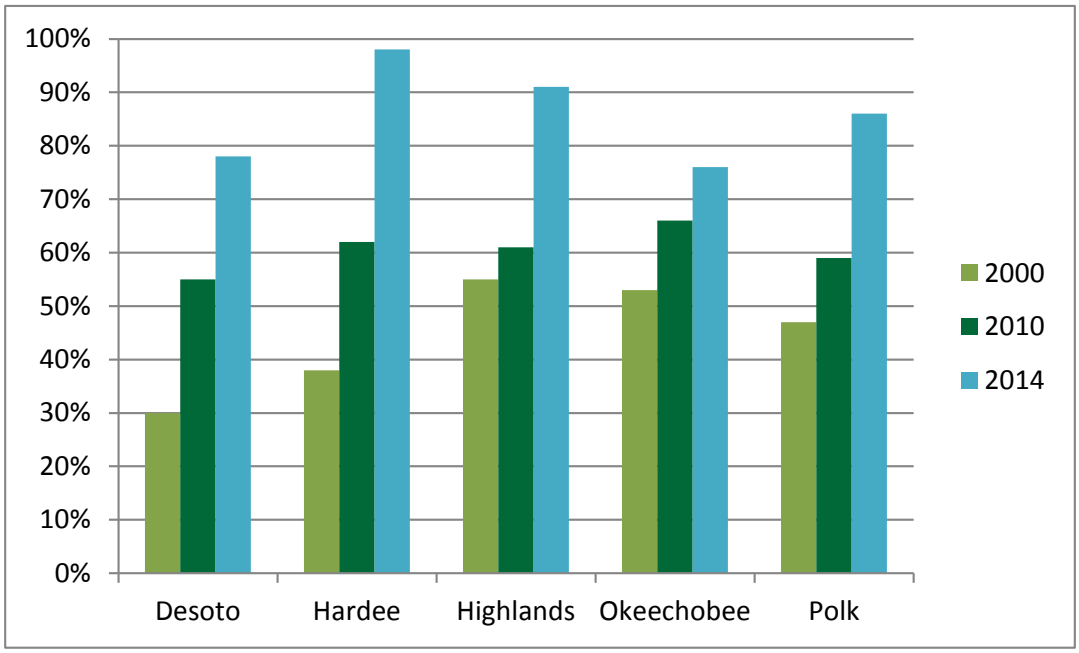
Student math scores, as measured by testing in 8th grade, have improved from 2000 to 2014. Student math performance is rated at 5 levels, 1 being the lowest and 5 being the highest. Table 23 shows the percentage of students scoring at each of the 5 levels in 2014 testing.

Table 23. 8th Grade Math Performance Scores, 2014, by Level

County	Level 1	Level 2	Level 3	Level 4	Level 5
DeSoto	1%	21%	45%	23%	10%
Hardee	0%	2%	36%	34%	28%
Highlands	0%	9%	33%	27%	31%
Okeechobee	3%	21%	60%	11%	5%
Polk	3%	12%	51%	22%	13%
Florida	**20%**	**10%**	**41%**	**23%**	**56%**

Figure 32 shows the change in the percentages of 8th grade students scoring at level 3 or higher in mathematics in 2000, 2010 and 2014. Scores have improved in every county in the region.

Figure 32. Percent of 8th Graders Testing at Level 3 or Higher in Math, 2000-2014



Source: Florida Department of Education, Florida Comprehensive Assessment Test

Innovation & Economic Development

Gross Domestic Product

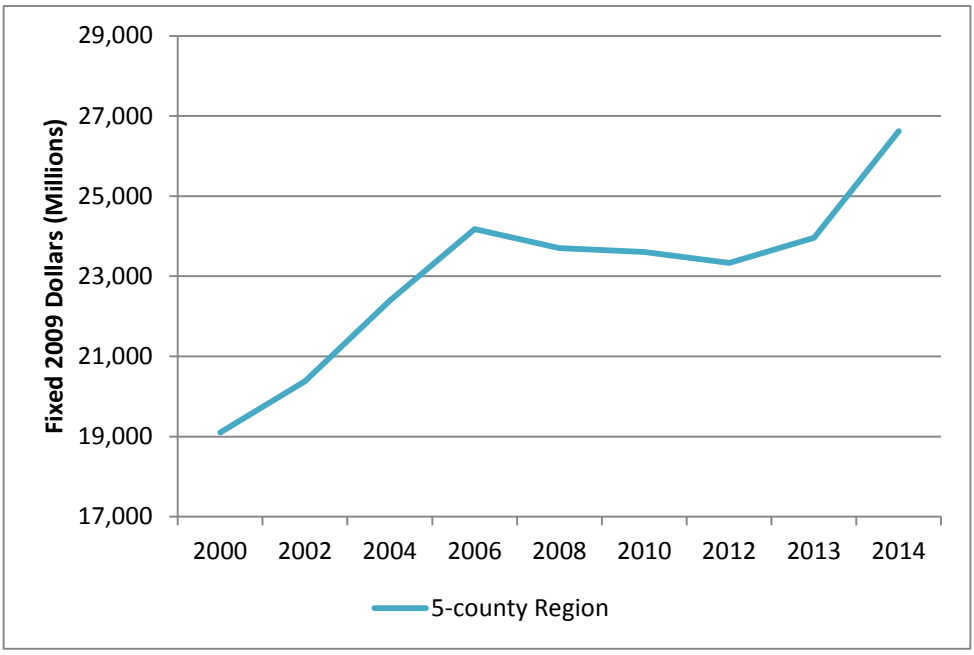
Gross Domestic Product (GDP) is the total value of all goods and services produced within a given region. GDP figures for central Florida are provided by REMI (Regional Economic Modeling, Inc.).

Table 24. Gross Domestic Product (in millions of 2009 dollars), 2000-2014

	2000	2002	2004	2006	2008	2010	2012	2013	2014
DeSoto	592	603	681	772	755	772	727	749	767
Hardee	560	573	648	679	713	724	664	684	700
Highlands	1,585	1,820	2,120	2,312	2,223	2,227	2,175	2,220	2,274
Okeechobee	706	733	881	887	881	914	902	923	944
Polk	15,659	16,650	18,061	19,528	19,129	18,967	18,865	19,389	19,927
5-County Region	**19,102**	**20,379**	**22,391**	**24,178**	**23,700**	**23,604**	**23,335**	**23,964**	**26,625**

As shown in Figure 33, GDP had declined in the region since the recession began, but has recovered and grown substantially since 2012. GDP is projected to keep increasing as the national economy recovers and the region's population and economy continue to grow.

Figure 33. The Region's GDP (in billions of 2009 dollars), 2000-2014



Source: REMI Policy Insight Plus

Bed Tax Collections

Tourist Development Taxes, colloquially known as "bed taxes," are levied as a local option by Florida's counties. The revenues are used for construction of tourist-related facilities, tourist promotion, and beach and shoreline maintenance, per Florida Statutes §125.0104.[35] The revenues for each county from state fiscal year 2007-2008 through 2014-2015 are shown in Table 25.

Table 25. Tourist Development Tax Revenues, SFY 2004-2015

County	Tax Rate								
		2008	2009	2010	2011	2012	2013	2014	2015
DeSoto	2% (since 2011)	–	–	–	$21,291	$35,861	$32,004	$41,139	$40,124
Hardee	None	–	–	–	–	-	-	-	-
Highlands	2%	$350,904	$320,193	$310,915	$286,450	$313,865	$318,671	$355,166	$237,430
Okeechobee	3%	$194,064	$156,776	$171,028	$165,540	$167,858	$193,250	$235,831	$211,907
Polk	5%	$7,534,915	$6,767,007	$6,040,642	$6,612,568	$6,833,166	7,191,570	$8,989,280	$7,848,093
Region		**$8,079,882**	**$7,243,977**	**$6,522,585**	**$7,085,849**	**$7,350,570**	**$7,735,495**	**$9,621,416**	**$8,337,554**

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

Trade Exports and Imports

Table 26 shows the total value of goods and services exported out of the region, measured in fixed 2005 dollars (in order to correct for inflation). Figures for 2000 through 2009 are actual, while figures for 2010 and later are projections.

Table 26. Exports (in millions of 2005 dollars), 2000-2012

	Actual										Projected		
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
DeSoto	454	478	480	524	519	577	608	619	573	597	630	647	665
Hardee	513	513	478	469	482	602	572	547	574	563	592	609	627
Highlands	1,194	1,255	1,362	1,449	1,538	1,595	1,608	1,543	1,411	1,374	1,419	1,459	1,505
Okeechobee	459	452	491	506	550	605	643	617	535	523	538	554	573
Polk	13,605	13,522	13,898	14,015	14,668	15,613	15,651	15,707	15,237	14,776	15,182	15,726	16,304
5-County Region	**16,224**	**16,221**	**16,708**	**16,964**	**17,756**	**18,992**	**19,081**	**19,033**	**18,330**	**17,834**	**18,360**	**18,995**	**19,674**

[35] Florida Department of Revenue "Local Option Taxes Authorized by the Legislature" (retrieved March 16, 2012)

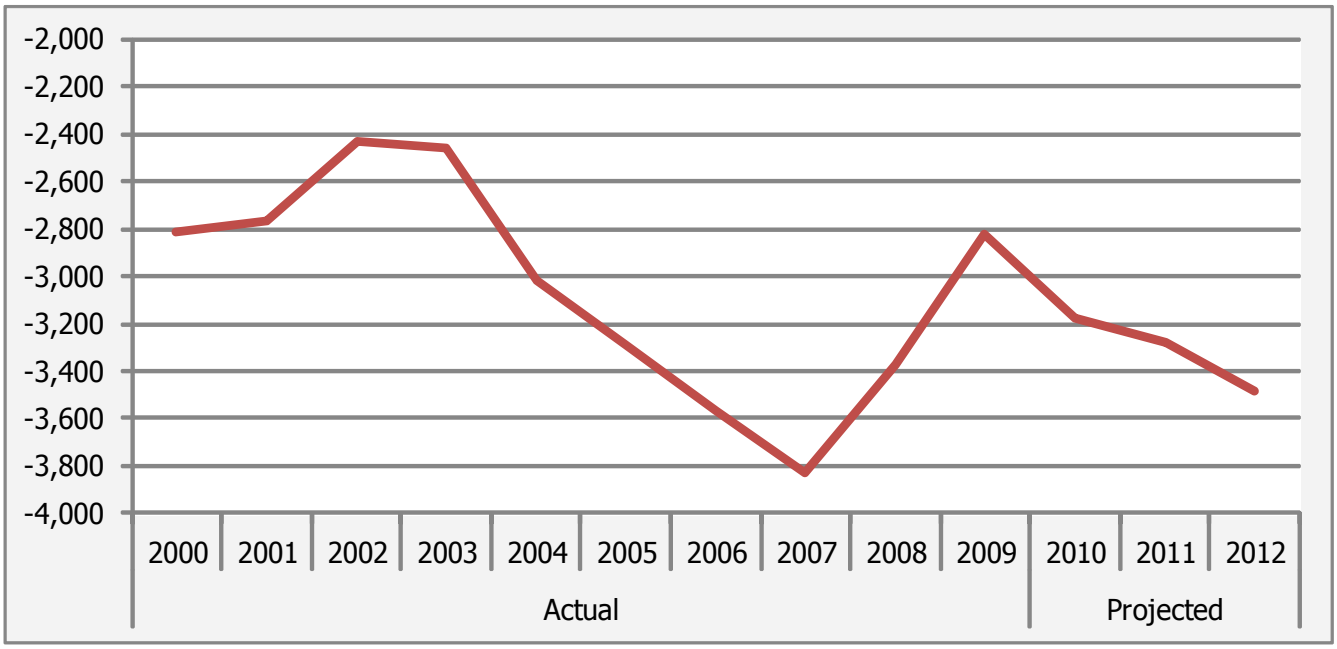
Table 27 shows the total value of goods and services imported into the region for the same time period.

Table 27. Imports (in millions of 2005 dollars), 2000-2012

	Actual										Projected		
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
DeSoto	814	820	801	792	864	916	963	957	909	880	928	956	989
Hardee	716	734	699	704	741	810	801	786	776	759	793	813	836
Highlands	2,093	2,142	2,206	2,245	2,344	2,467	2,573	2,567	2,451	2,359	2,436	2,500	2,578
Okeechobee	895	902	901	924	1,007	1,093	1,106	1,106	1,064	1,035	1,080	1,107	1,140
Polk	14,524	14,391	14,533	14,759	15,823	16,999	17,210	17,444	16,504	15,621	16,296	16,899	17,615
5-County Region	**19,040**	**18,990**	**19,140**	**19,424**	**20,778**	**22,285**	**22,653**	**22,861**	**21,704**	**20,653**	**21,532**	**22,275**	**23,157**

Figure 34 shows the region's net exports from 2000 to 2012 (projected for 2010 to 2012). Net exports are calculated by subtracting imports from exports. The region is a net importer, meaning that it imports more goods and services than it exports.

Figure 34. Net Exports (in billions of 2005 dollars), 2000-2012



Source: REMI Policy Insight Plus

Infrastructure & Growth Leadership

Population Counts, Estimates and Projections

Table 28 shows the population of each county in the region from 1980 to 2010 according to the decennial census, as well as decennial projections of population from 2020 to 2040 according to the Bureau of Economic and Business Research. (BEBR)[36] Going by BEBR's medium-range projections, the region is expected to gain approximately 358,000 people (a 45 percent increase) between 2010 and 2040.

Table 28. Population Counts and Projections, 1980-2040

	Decennial Census Population					BEBR Projected Population		
	1980	1990	2000	2010		2020	2030	2040
DeSoto	19,039	23,865	32,209	34,862	Low	33,400	33,200	32,600
					Medium	36,700	39,100	41,300
					High	40,000	44,900	50,000
Hardee	20,357	19,499	26,938	27,731	Low	25,700	24,500	23,200
					Medium	28,200	28,800	29,400
					High	30,700	33,200	35,600
Highlands	47,526	68,432	87,366	98,786	Low	97,200	98,900	98,600
					Medium	106,800	116,500	124,700
					High	116,400	133,800	151,000
Okeechobee	20,264	29,627	35,910	39,996	Low	38,700	38,700	38,000
					Medium	42,500	45,600	48,200
					High	46,400	52,400	58,300
Polk	321,652	405,382	483,924	602,095	Low	629,600	665,200	679,600
					Medium	698,900	812,900	918,100
					High	769,500	957,200	1,157,200
5-County Region	428,838	546,805	666,347	803,470	Low	824,600	860,500	872,000
					Medium	913,100	1,042,900	1,161,700
					High	1,003,000	1,221,500	1,452,100
Florida	9,746,961	12,938,071	15,982,824	18,801,310	Low	20,140,700	21,779,800	23,249,600
					Medium	21,021,600	23,567,000	25,847,000
					High	22,329,900	26,052,100	29,576,400

[36] Bureau of Economic and Business Research (BEBR) "Projections of Florida Population by County, 2010–2040." Florida Population Studies, Vol. 44, Bulletin 159, June 2011

Table 29 shows the most recent population estimates available for each county.

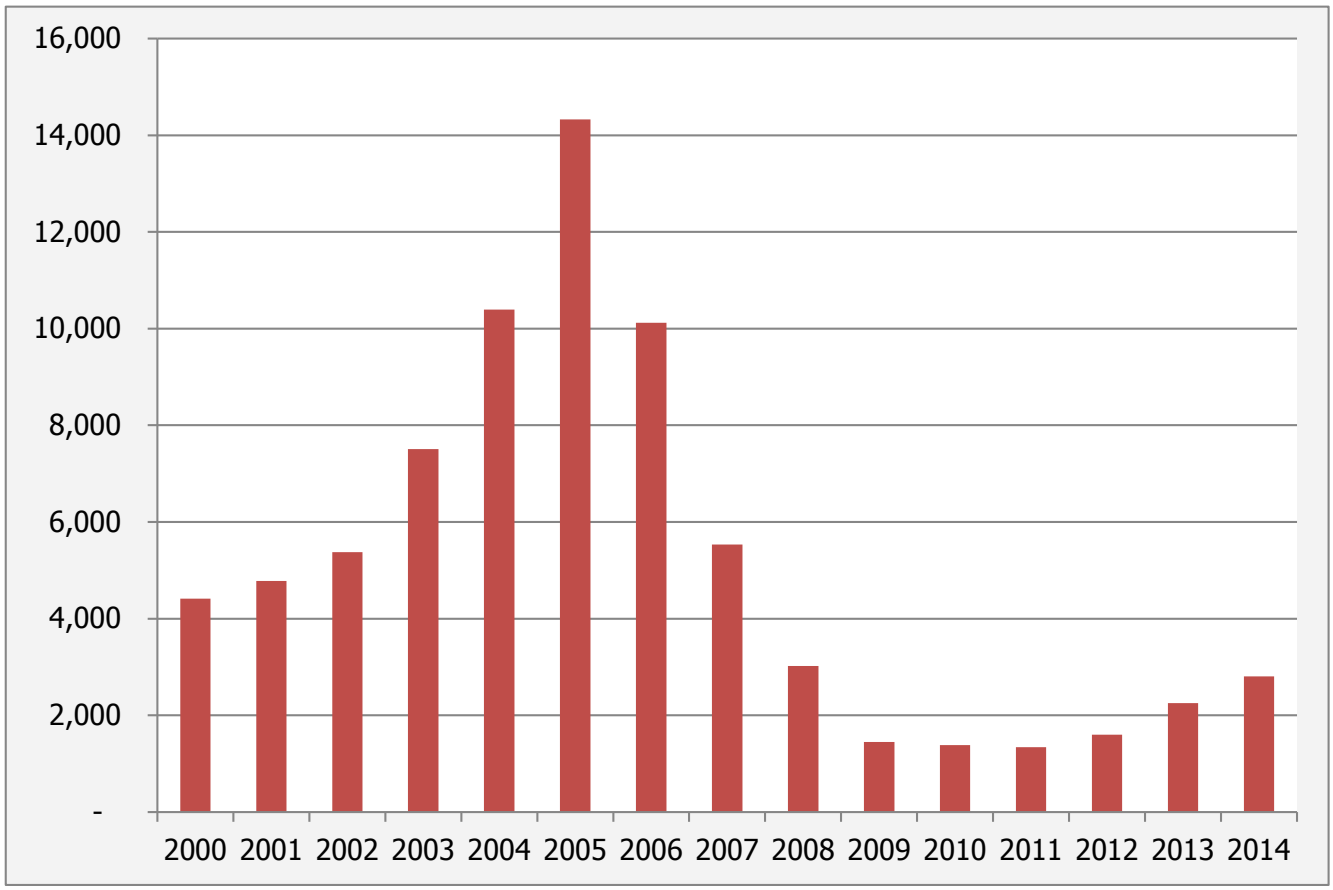
Table 29. 2013 and 2014 Population Counts

	2013	2014
DeSoto	34,517	34,426
Hardee	27,519	27,712
Highlands	97,616	99,818
Okeechobee	39,330	39,828
Polk	623,009	623,174
5-County Region	**821,991**	**824,958**

Annual Building Permits

The number of new building permits issued annually in the region reached a high point in 2005, then returned to pre-2000 levels (see Figure 35). In addition to a strong housing market, recovery efforts after the 2004 hurricane season, during which three significant hurricanes damaged the housing stock of the region, may have contributed to the 2005 peak.

Figure 35. Annual New Privately-Owned Residential Building Permits



(Estimates with Imputation)

However, 2005 was a peak year for building permits only in Polk County; building permit numbers in DeSoto,

Hardee, and Highlands Counties peaked in 2006, and in Okeechobee County in 2007 (see Table 30).

Table 30. Annual New Privately-Owned Residential Building Permits

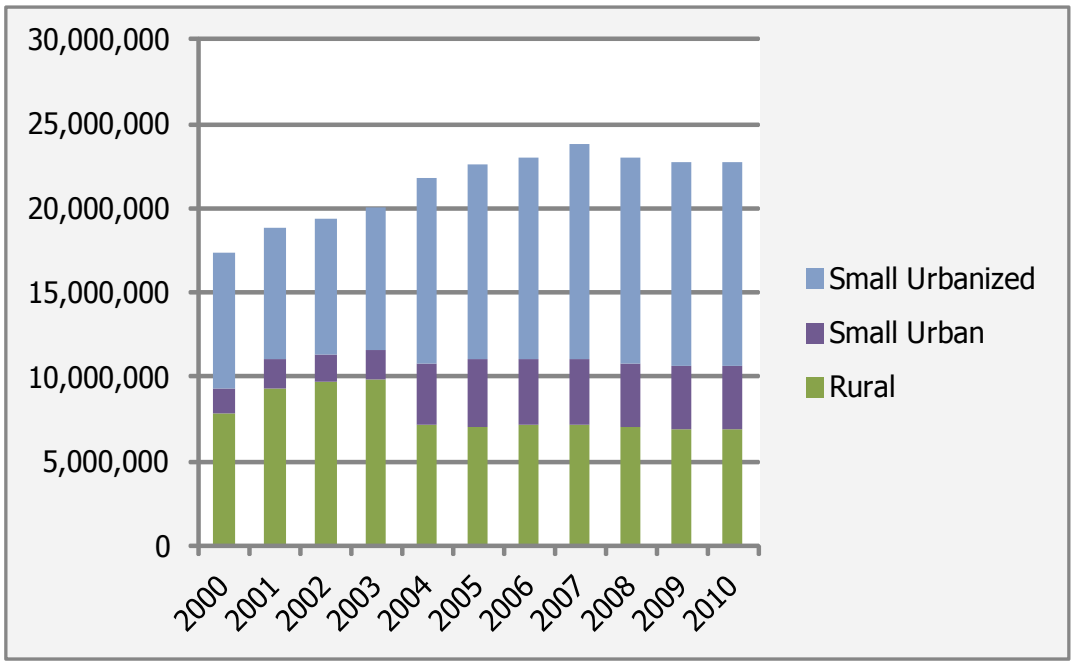
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
DeSoto	57	69	113	95	149	166	177	141	163	109	96	95	117	117	112
Hardee	54	63	48	72	71	119	216	141	56	25	12	14	19	19	17
Highlands	439	538	526	704	926	1,205	1,435	926	162	68	85	76	32	58	91
Okeechobee	129	120	139	163	183	181	202	289	177	39	43	42	22	35	17
Polk	3,637	3,902	4,460	6,341	8,886	12,164	7,737	3,892	2,320	1,135	1,119	1086	1,382	1,994	2,533
5-County Region	**4,316**	**4,692**	**5,286**	**7,375**	**10,215**	**13,835**	**9,767**	**5,389**	**2,878**	**1,376**	**1,355**	**1313**	**1572**	**2223**	**2770**

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

Vehicle Miles Traveled per Lane Mile

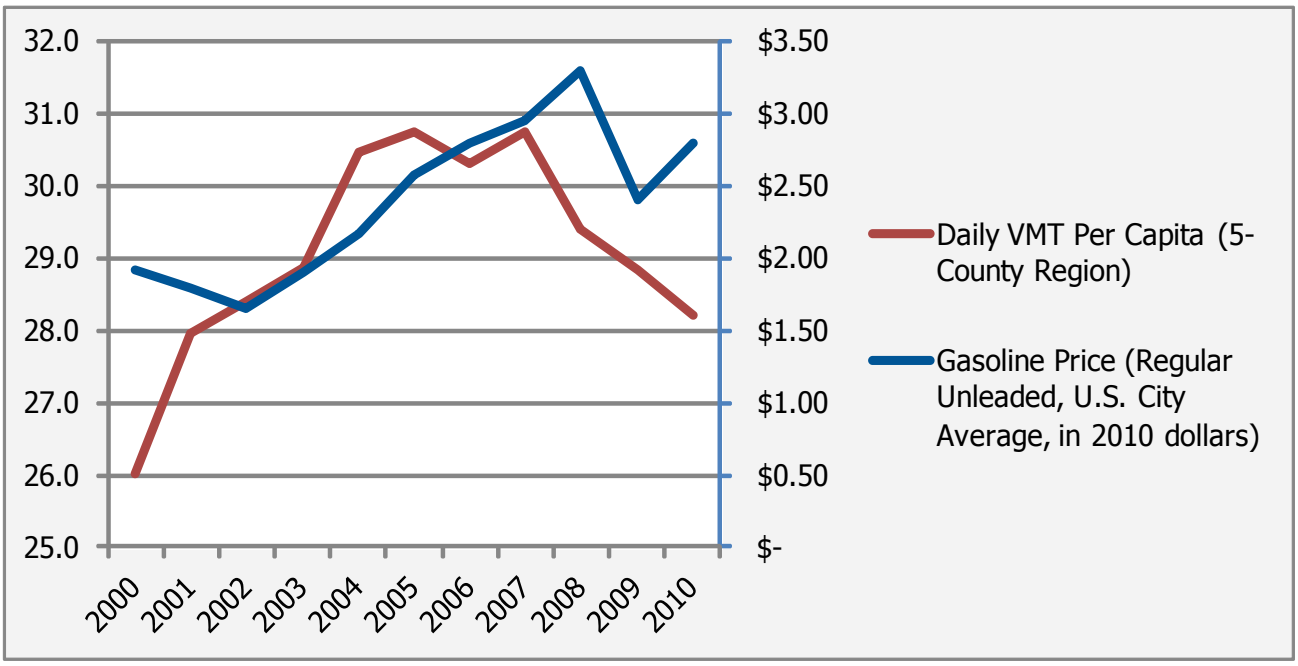
Daily vehicle miles traveled (VMT) are calculated by counting traffic at certain representative times and locations and extrapolating average daily numbers. Roads in the region are categorized, according to the area they are in, as "Rural" (in an area with population less than 5,000), "Small Urban" (in an area with population 5,000 to 49,999), or "Small Urbanized" (in an area with population 50,000 to 199,999). As the region has grown and become more urbanized in the last decade, rural VMT have decreased and urban and urbanized VMT have increased (see Figure 36).

Figure 36. Total Daily Vehicle Miles Traveled by Area Type, 2000-2010



Vehicle miles traveled are influenced by fuel prices, population, unemployment, and other factors. Figure 37 compares the daily vehicles miles traveled in the region, per person, with the average price for regular unleaded gasoline, adjusted for inflation (expressed in 2010 dollars). Although decreasing VMT can be a signal of higher fuel prices and more unemployment, less traffic can also mean less congestion, lower vehicle emissions, fewer vehicle crashes, more efficient transportation choices, and less funding needed for road repair and construction.

Figure 37. VMT and Gas Prices, 2000-2010



Sources: Florida Department of Transportation, Florida Highway Mileage and Travel Report 2010
Fuel Prices: U.S. Energy Information Administration, Motor Gasoline Retail Prices, U.S. City Average

Business Climate & Competitiveness

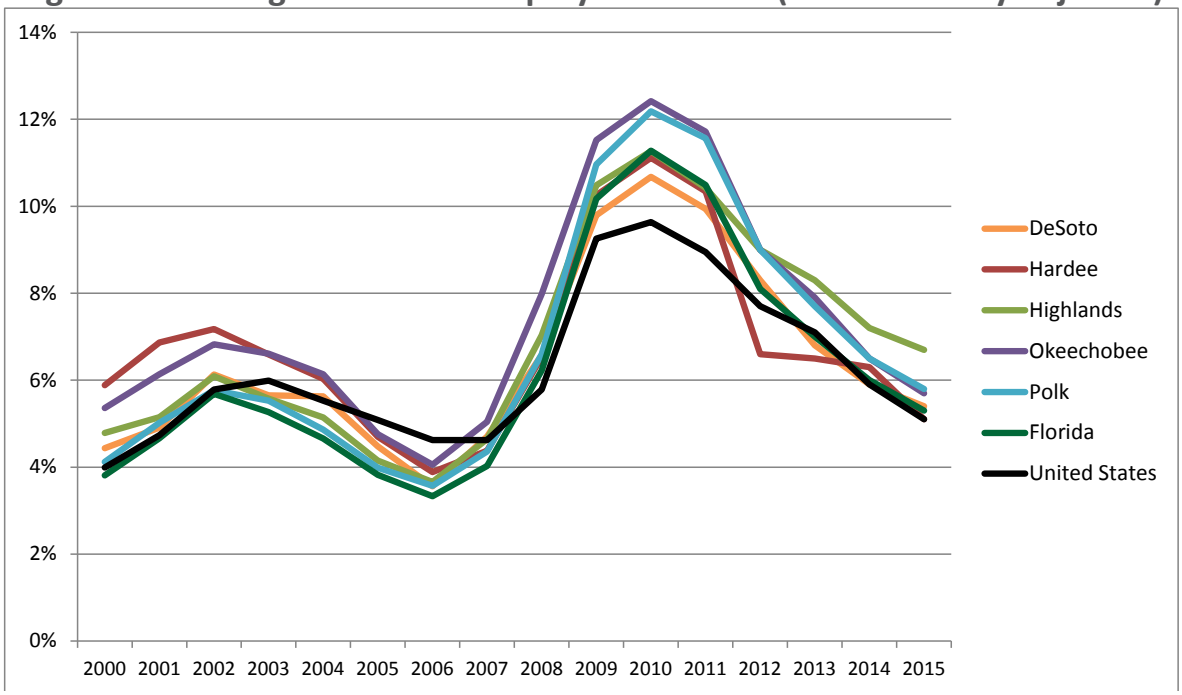
Average Annual Unemployment Rates

Over the past decade, annual average unemployment rates in the region were the lowest in 2006 (3.6%) before rising each year from 2007 to 2010. Figures for 2015 indicate a steady recovery (see Table 31). Highlands county has had the highest unemployment rate in recent years. Hardee and Desoto counties have had the lowest.

Table 31. Annual Average Unemployment Rates in the 5-County Region, 2000-2015

Year	Annual Average Unemployment Rate		Year	Annual Average Unemployment Rate
2000	4.3%		2008	6.7%
2001	5.1%		2009	10.9%
2002	5.9%		2010	12.0%
2003	5.6%		2011	11.3%
2004	5.0%		2012	8.4%
2005	4.1%		2013	7.4%
2006	3.6%		2014	6.5%
2007	4.4%		2015	5.9%

Figure 38. Average Annual Unemployment Rates (not seasonally adjusted)



Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics

Employment by Industry

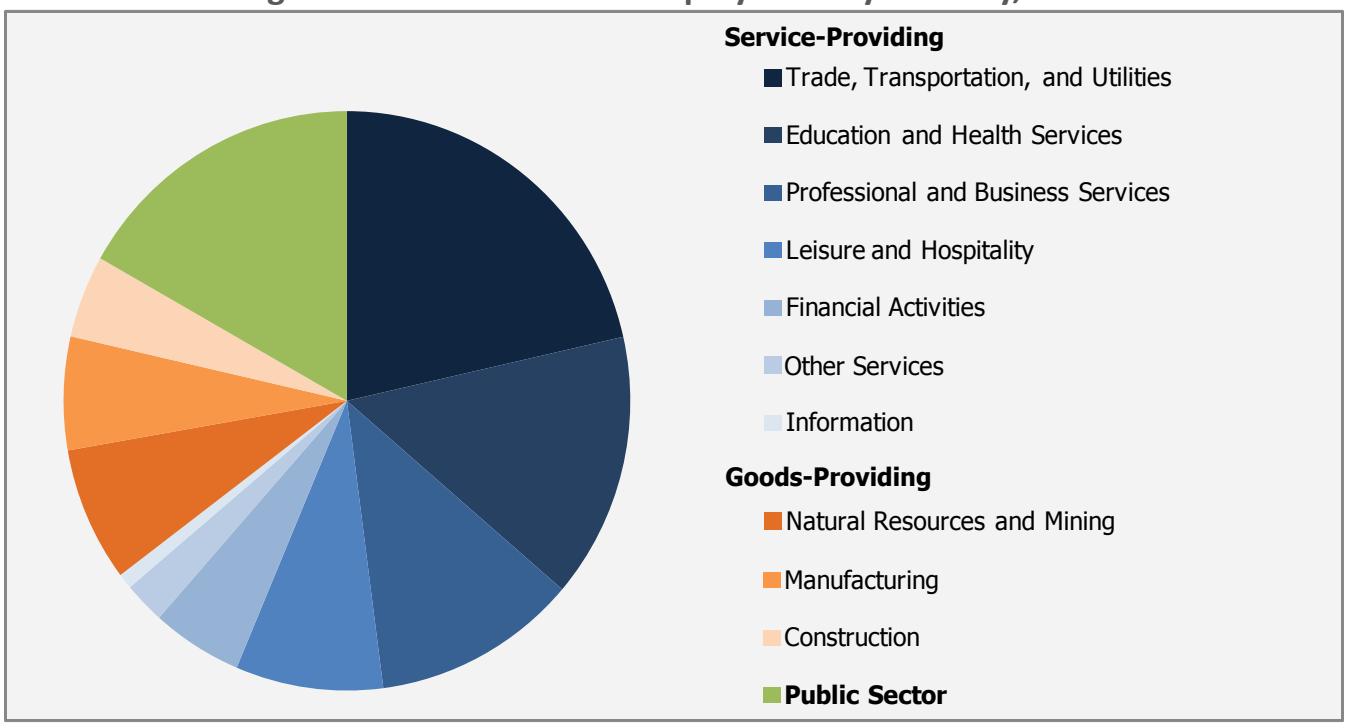
Table 32 shows the number of people in the region employed in the major industry groups established by the North American Industry Classification System (NAICS).

Table 32. Total Employment by Industry, 2014 Annual Average

Industry	DeSoto	Hardee	Highlands	Okeechobee	Polk
Goods-Producing Industries					
Construction	389	177	951	538	10,634
Manufacturing	252	267	649	450	16,225
Natural Resources and Mining	1,167	2,171	3,183	1,254	4,596
Total, Goods-Producing	**1,808**	**2,615**	**4,783**	**2,242**	**31,455**
Service-Providing Industries					
Education and Health Services	1,723	1,651	7,594	2,650	43,555
Financial Activities	227	273	801	226	11,209
Information	19	-	187	65	1,600
Leisure and Hospitality	639	501	3,184	1,161	20,596
Professional and Business Services	344	260	2,430	806	24,823
Trade, Transportation, and Utilities	2,305	1,070	5,236	2,200	48,317
Other Services	109	83	596	242	4,787
Total, Service-Providing	**5,366**	**3,838**	**20,028**	**7,350**	**154,887**
Unclassified	N/A	-	6	-	82
Total, All Industries	**7,174**	**6,453**	**24,817**	**9,592**	**186,424**

Figure 39 shows the share of service-providing industry employment in shades of blue and goods-providing industry employment in shades of orange. As of 2010, 66.1 percent of total employment in the region is in service-providing industries, especially trade, transportation, utilities, education, and health care. Goods-producing industries represent 17.5 percent of employment, while the public sector represents 16.4 percent.

Figure 39. Distribution of Employment by Industry, 2010



Source: U.S. Department of Labor, Bureau of Labor Statistics

Wages by Industry

Table 33 shows the 2014 average annual wage for workers in each of the major industry groups established by the North American Industry Classification System (NAICS) for each county in the region, as well as for Florida and the United States. Overall, wages are highest in Polk County and lowest in Hardee County. Almost all industry sectors command far lower wages in the region's counties than in all of Florida or the nation as a whole.

Table 33. Wages by Industry, 2014

Industry	DeSoto	Hardee	Highlands	Okeechobee	Polk
Goods-Producing Industries					
Construction	$28,900	$28,920	$29,239	$37,687	$41,961
Manufacturing	$60,715	$29,717	$35,861	$39,181	$49,130
Natural Resources and Mining	$29,838	$28,744	$24,849	$32,283	$36,955
Average, Goods-Producing	**$33,938**	**$28,855**	**$27,216**	**$34,965**	**$44,927**
Service-Providing Industries					
Education and Health Services	$39,155	$32,346	$40,146	$42,212	$40,727
Financial Activities	$34,213	$40,390	$38,935	$42,390	$49,954
Information	$56,163	-	$39,075	$36,903	$46,777
Leisure and Hospitality	$14,551	$13,149	$16,639	$15,260	$17,184
Professional and Business Services	$38,067	$29,336	$30,307	$33,031	$41,479
Trade, Transportation, and Utilities	$33,812	$34,441	$28,423	$30,650	$36,417
Other Services	$24,768	$23,013	$21,745	$27,169	$33,947
Average, Service-Providing	**$34,018**	**$31,903**	**$32,232**	**$33,725**	**$37,302**
Unclassified	N/A	-	$49,213	-	$21,166
Average, All Workers	**$34,000**	**$30,818**	**$31,321**	**$33,989**	**$38,514**

Source: U.S. Department of Labor, Bureau of Labor Statistics

Civic & Governance Systems

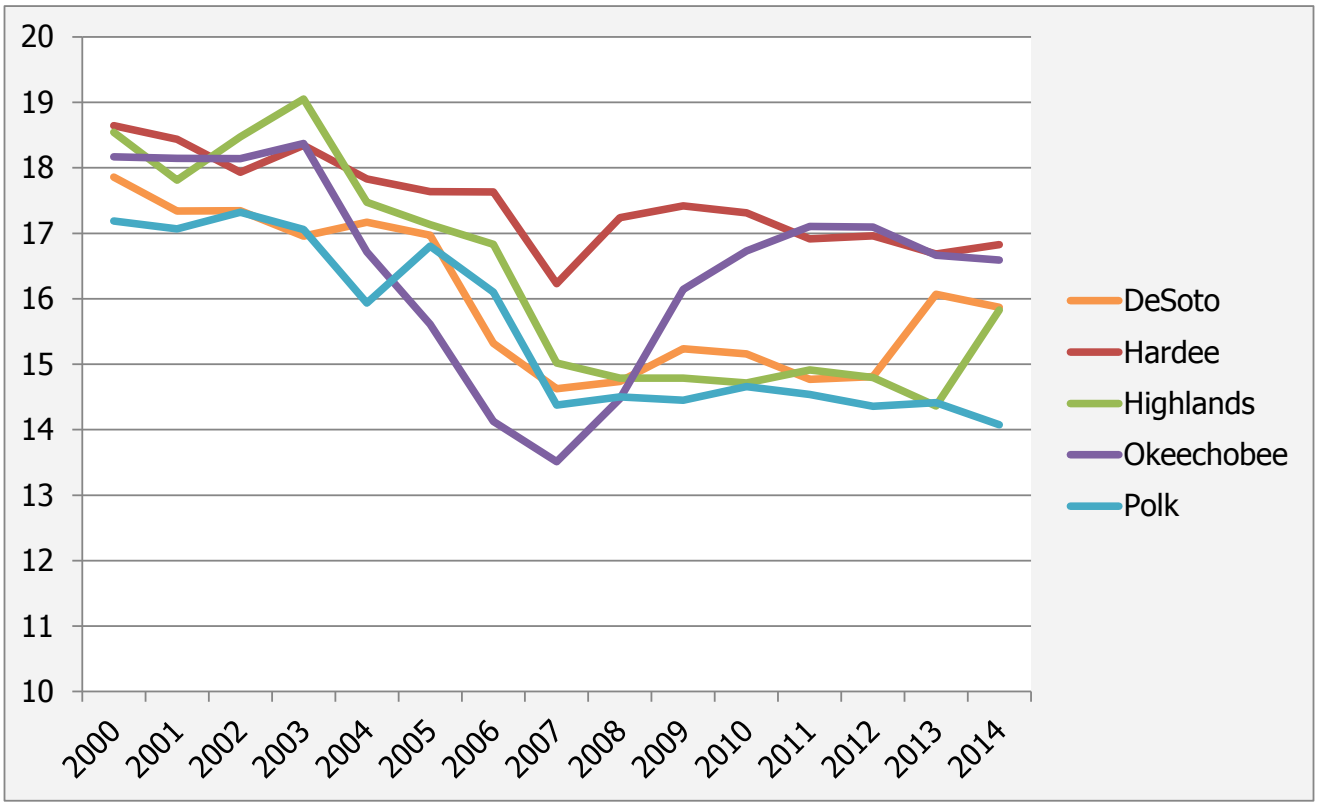
Millage Rates

Table 34 shows the county-wide millage rates levied in each county from 2000 to 2014. Figure 40 indicates the changes in millage rates between 2000 and 2014.

Table 34. County-Wide Total Millage Rates, 2000-2014

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
DeSoto	17.86	17.34	17.35	16.96	17.17	16.97	15.32	14.63	14.74	15.24	15.16	14.77	14.81	16.07	15.87
Hardee	18.65	18.44	17.93	18.34	17.83	17.64	17.63	16.23	17.24	17.42	17.31	16.92	16.96	16.68	16.83
Highlands	18.54	17.81	18.47	19.05	17.48	17.14	16.83	15.02	14.79	14.79	14.72	14.91	14.80	14.37	15.83
Okeechobee	18.17	18.14	18.14	18.37	16.72	15.61	14.13	13.51	14.47	16.14	16.73	17.10	17.10	16.67	16.59
Polk	17.19	17.07	17.32	17.06	15.93	16.81	16.10	14.38	14.50	14.45	14.66	14.54	14.36	14.41	14.07

Figure 40. Millage Rates, 2000 - 2014



Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections

Registered Nonprofit Organizations (501 (c)(3) only)

Table 35 shows the total number of registered 501(c)(3) nonprofit organizations in each county in the region from 2000 to 2011. The total number of nonprofits in the region has increased by 46 percent since 2000.

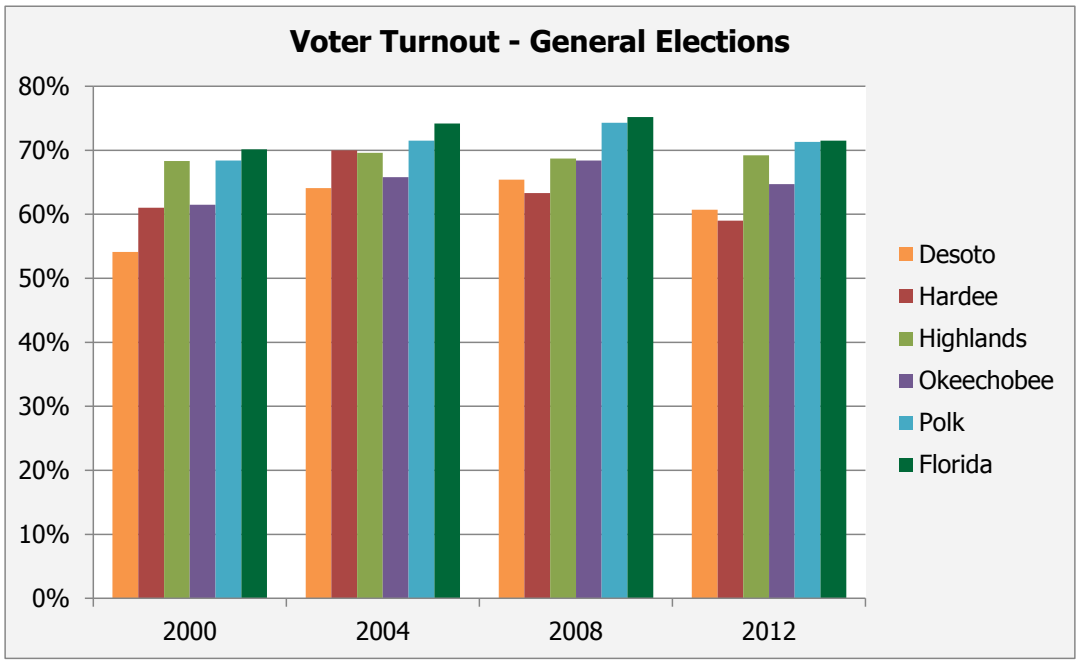
Table 35. Number of Registered Nonprofit Organizations by County, 2000-2011

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
DeSoto	51	64	68	79	82	89	100	97	106	107	110	107
Hardee	75	79	83	93	95	100	99	102	106	114	119	107
Highlands	333	345	360	388	394	401	405	412	436	454	463	430
Okeechobee	105	107	104	120	129	130	134	140	148	152	156	152
Polk	1487	1511	1576	1687	1764	1792	1863	1927	1982	2052	2174	2169

Voter Participation

Voter participation in the region has been consistently lower than for the state as a whole (see Figure 41).

Figure 41. Voter Participation, 2000-2012 Presidential Elections



Source: Florida Department of State, Division of Elections

Quality of Life & Quality Places

Per Capita Income

The Bureau of Economic Analysis provides estimates of per capita personal income. Per capita personal income is defined as the income received by all persons from all sources (including transfer payments, and measured before personal taxes are deducted), divided by the total population.[37] Table 36 shows per capita personal income in each county, adjusted for inflation (expressed in 2010 dollars), from 2004 to 2013.

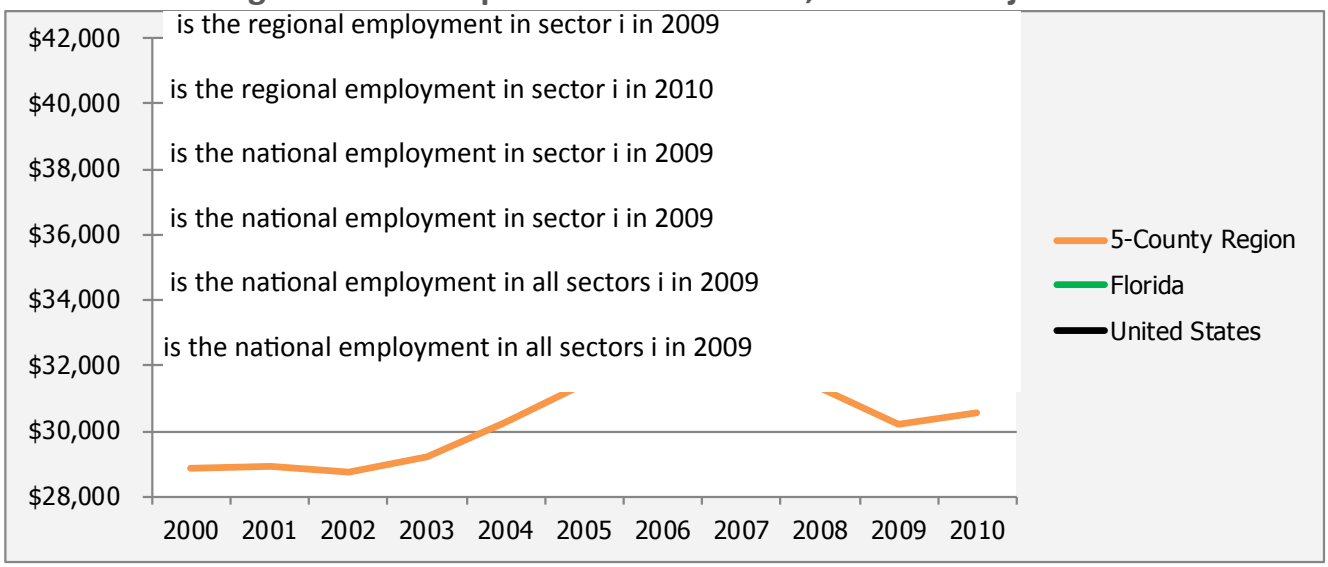
Table 36. Per Capita Personal Income, 2004-2013

County	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
DeSoto	$21,315	$22,740	$23,566	$23,370	$23,298	$22,776	$22,957	$24,574	$25,506	24,664
Hardee	$23,229	$24,690	$24,150	$23,840	$24,093	$23,686	$24,091	$24,898	$26,237	25,752
Highlands	$27,207	$27,636	$28,387	$28,873	$28,622	$28,299	$28,630	$29,809	$31,076	30,962
Okeechobee	$24,043	$24,955	$25,190	$26,015	$25,772	$25,419	$27,895	$25,831	$27,291	27,423
Polk	$32,160	$33,413	$33,577	$33,430	$32,947	$31,572	$31,807	$33,447	$35,746	34,393
5-County Region Average	**$25,591**	**$26,687**	**$26,974**	**$27,105**	**$26,946**	**$26,350**	**$27,076**	**$27,711**	**$29,171**	**$28,639**

Figure 42 shows the trend in inflation-adjusted per capita income from 2000 to 2012. Per capita income has declined since the nationwide recession began, but is still higher (even after adjusting for inflation) than it was at the beginning of the last decade.

where:

Figure 42. Per Capita Personal Income, Inflation-Adjusted



Sources: U.S. Department of Commerce, Bureau of Economic Analysis
Inflation Adjustment: Bureau of Labor Statistics CPI Calculator

[37] Bureau of Economic Analysis News Release: "State Personal Income 2009." (retrieved April 4, 2012).

House Cost Index

The House Cost Index is a measure of single-family house prices relative to statewide prices. Table 37 shows the House Cost Index, as of 2010, for each county in the region. The House Cost Index is calculated by the Bureau of Economic and Business Research.

Table 37. House Cost Index

County	House Cost Index
DeSoto	80.93
Hardee	84.99
Highlands	82.80
Okeechobee	81.17
Polk	83.42

Source: Florida Statistical Abstract, 2010, Table 2.10

Persons Living in Poverty

Table 38 shows the percent of persons living in poverty in the region in 2013 (the latest year for which data are available from the Bureau of Business and Economic Research).

Table 38. Persons Living in Poverty (2013)

	Persons Living In Poverty		Persons Under Age 18 Living In Poverty	
	Total	Percentage	Total	Percentage
DeSoto	10,572	30.5%	3,227	47.0%
Hardee	7,368	27.0%	2,798	39.0%
Highlands	19,322	19.7%	5,724	33.0%
Okeechobee	9,422	23.8%	3,193	37.0%
Polk	117,893	19.3%	41,255	29.0%
Florida	**3,268,130**	**17.1%**	**982,272**	**25.0%**

Source: Bureau of Business and Economic Research (2013)

Shift-Share Analysis

Shift-share analysis identifies which private sector industries have a comparative advantage in a given region by comparing the regional change in employment in a given industry to the national change in employment in that same industry. The shift-share analysis in this section compares employment in the year 2009 to employment in 2010 and examines employment in the major industry groups established by the North American Industry Classification System (NAICS).

Shift-share analysis has three components: [38]

- National Share (NS): the share of regional job growth that can be attributed to growth in the national economy;
- Industry Mix (IM): the proportion of growth that results from the region's industries; and
- Regional Shift (RS): a measure of regional competitiveness that compares the regional growth rate in an industry sector with the growth rate for the same sector at the national level.

where:

The formulas employment in industry i in the region

total employment in the region

$$\left(\frac{E^t}{E^{t-1}}\right)$$

employment in industry i in the nation

total employment in the nation

$$\left[-\frac{E^t}{E^{t-1}}\right)$$

$$\text{Regional Shift: } RS_i = e_i^{t-1}\left(\frac{e_i^t}{e_i^{t-1}} - \frac{E_i^t}{E_i^{t-1}}\right)$$

where:

e_i^{t-1}

e_i^t

E_i^{t-1}

E_i^t

E^{t-1}

E^t

[38] Yacovissi, William. "Shift Share Analysis" Mansfield University (retrieved June 21, 2012)

The results from a shift-share analysis of the region are shown in Table 39.

Table 39. Shift-Share Analysis

Industry	2009 Regional Employment	2009 National Employment	2010 Regional Employment	2010 National Employment	National Share	Industry Mix	Regional Shift
Goods-Producing Industries							
Construction	12,659	5,948,837	11,329	5,489,499	12,571	-889	-353
Manufacturing	16,210	11,810,371	15,624	11,487,496	16,097	-330	-143
Natural Resources and Mining	15,945	1,783,558	15,403	1,798,592	15,834	246	-676
Service-Providing Industries							
Education and Health Services	36,703	18,321,635	36,966	18,656,160	36,447	926	-407
Financial Activities	12,622	7,589,821	12,865	7,401,812	12,534	-225	556
Information	2,256	2,807,721	2,097	2,703,886	2,240	-68	-76
Leisure and Hospitality	20,829	13,001,028	20,605	13,006,814	20,684	155	-233
Professional and Business Services	30,706	16,488,835	29,155	16,712,011	30,492	630	-1,967
Trade, Transportation, and Utilities	53,365	24,651,647	52,672	24,442,734	52,993	-80	-241
Other Services	5,796	4,369,780	5,798	4,349,563	5,756	14	29

Conclusions from Shift Share Analysis

The National Share shows what the change of employment in each industry would have been if employment had followed national trends. Regionally and nationally, employment in most industries declined from 2009 to 2010. From the National Share, we can see that all the goods-producing industries in the region and four service-providing industries (Information, Leisure and Hospitality, Professional and Business Services, and Trade, Transportation, and Utilities) fared worse in the region than they did nationally between 2009 and 2010. The National Share for all these industries is higher than the actual 2010 employment in the region.

The Industry Mix shows that the region has weaker job growth in certain sectors (Construction, Manufacturing, Financial Activities, Information, and Trade, Transportation, and Utilities) than it would if its job structure were identical to that of the nation. Conversely, the region has stronger job growth than the nation in Natural Resources and Mining, Education and Health Services, Leisure and Hospitality, and Professional and Business Services.

The Regional Shift shows that the region has a competitive advantage in Financial Activities, but in no other specific industries.

Location Quotient Analysis

The location quotient compares the region's share of employment in a given industry to the national share. The result indicates the degree to which the region specializes in each industry. If the location quotient for a given industry is less than 1, all employment is assumed to be "non-basic" (that is, the industry is not exporting its goods or services, and is not meeting local demand). If the location quotient is exactly 1, local employment is sufficient to meet local demand, but no goods or services are exported. If the location quotient is more than 1, some employment is "basic" (meaning that the industry employs more people than would be necessary to meet local needs, and therefore the industry is assumed to be exporting goods or services out of the region).

The location quotient is calculated with the following formula:

$$LOQ = \frac{e_i/e_T}{E_i/E_T}$$

where:

e_i =

e_T =

E_i =

E_T =

The location quotients for the region's industry sectors, using 2010 data, are shown in Table 40. These results indicate that the region is a strong exporter in the Natural Resources and Mining sector. This is expected, given this sector is a mainstay of the regional economy. The region is also an exporter in the industries of Construction, Education, Health Services, Trade, Transportation, and Utilities.

Table 40. Location Quotients

Industry	2010 Location Quotient
Goods-Producing Industries	
Construction	1.08
Manufacturing	0.71
Natural Resources and Mining	4.49
Service-Providing Industries	
Education and Health Services	1.04
Financial Activities	0.91
Information	0.41
Leisure and Hospitality	0.83
Professional and Business Services	0.91
Trade, Transportation, and Utilities	1.13
Other Services	0.70
Unclassified	0.03

Industry Clusters

Cluster strategy is an effective industry development strategy that partners industry, government, and education to work cooperatively to leverage a region's competitive strengths in order to spur job creation and encourage long term economic growth. The cluster approach can foster innovation and productivity gain by identifying a region's "economic ecosystems" through identifying current industry clusters and favorable targeted clusters based on trends and opportunities. Cluster identification is a helpful tool in addressing issues such as human capital and workforce development, infrastructure planning and development, and community development.

Industry clusters are groups of industries that are interrelated within the economy of a specific region. Clusters are typically determined through a specific analysis of the regional economy. For example, a prior industry cluster study of Polk, Hardee, and Highlands Counties[39] identified "Agriculture and Agribusiness" as an industry cluster, which included such interrelated industries as Animal Production, Animal Food Production, Animal Slaughtering and Processing, and Support Activities for Animal Production—all of which are integral to the cattle industry, a historical mainstay of the Central Florida region's economy.

The industry clusters in this Comprehensive Economic Development Strategy are supplied by REMI Policy Insight Plus modeling software (Regional Economic Models, Inc.), Version 1.3.13, Build 2775. This section provides an overview of employment by industry cluster in the region, at the regional level and for each of the five counties. Industries are divided into the principal categories of Private Non-Agricultural employment, Agricultural employment, and Government employment. Private Non-Agricultural is subdivided into 19 industry clusters. Employment figures are provided for the years 2000 and 2010, in order to provide an overview of how employment has changed in the region during the past decade.

Table 41 provides a summary of total employment in the region, divided into the private non-agricultural, government, and agricultural sectors. In 2000, the total number of employees in the region was 303,146. In 2010, the total was 329,607, an increase of 26,461 or 8.7 percent. However, the agricultural sector decreased by 21.5 percent, from 12,224 in 2000 to 9,595 in 2010.

Table 41. Central Florida Region - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	251,640	278,584	26,944	10.7%
Government	39,282	41,428	2,146	5.5%
Agricultural	12,224	9,595	-2,629	-21.5%
Total	**303,146**	**329,607**	**26,461**	**8.7%**

[39] SRI International (2008) Central Florida Cluster Study: Industry Cluster Assessment & Selection (retrieved July 10, 2012)

Regional Employment

Table 42 shows employment by industry for the five-county region in 2000 and 2010. The industries listed, ranging from retail trade to utilities, employed 251,640 people in 2000. In 2010, the industries employed 278,584, an increase of 10.7 percent from 2000.

Table 42. Central Florida Region - Employment by Industry

Industry	2000	2010	Change	Percent Change
Retail Trade	36,915	38,431	1,516	4.1%
Health Care and Social Assistance	28,710	36,312	7,602	26.5%
Administrative and Waste Services	24,385	26,087	1,702	7.0%
Other Services, except Public Administration	16,906	19,955	3,049	18.0%
Accommodation and Food Services	14,933	19,022	4,089	27.4%
Construction	18,181	17,749	-432	-2.4%
Transportation and Warehousing	14,713	16,304	1,591	10.8%
Manufacturing	20,784	15,417	-5,367	-25.8%
Finance and Insurance	11,907	15,277	3,370	28.3%
Real Estate and Rental and Leasing	7,333	13,816	6,483	88.4%
Professional and Technical Services	10,310	13,320	3,010	29.2%
Forestry, Fishing, Related Activities, and Other	13,654	12,015	-1,639	-12.0%
Wholesale Trade	10,718	11,488	770	7.2%
Management of Companies and Enterprises	6,615	5,969	-646	-9.8%
Arts, Entertainment, and Recreation	5,103	5,844	741	14.5%
Educational Services	3,206	5,291	2,085	65.0%
Information	3,614	2,786	-828	-22.9%
Mining	2,698	2,517	-181	-6.7%
Utilities	955	986	31	3.2%
Total	**251,640**	**278,584**	**26,944**	**10.7%**

Figure 43 below illustrates growth in 13 of the 19 industry categories between 2000 and 2010. Seven industry categories—Manufacturing, Construction, Forestry/Fishing, Management of Companies and Enterprises, Information, and Mining—declined during the 10-year time frame.

Figure 43. Private Non-Agricultural Employment by Industry- Central Florida Region

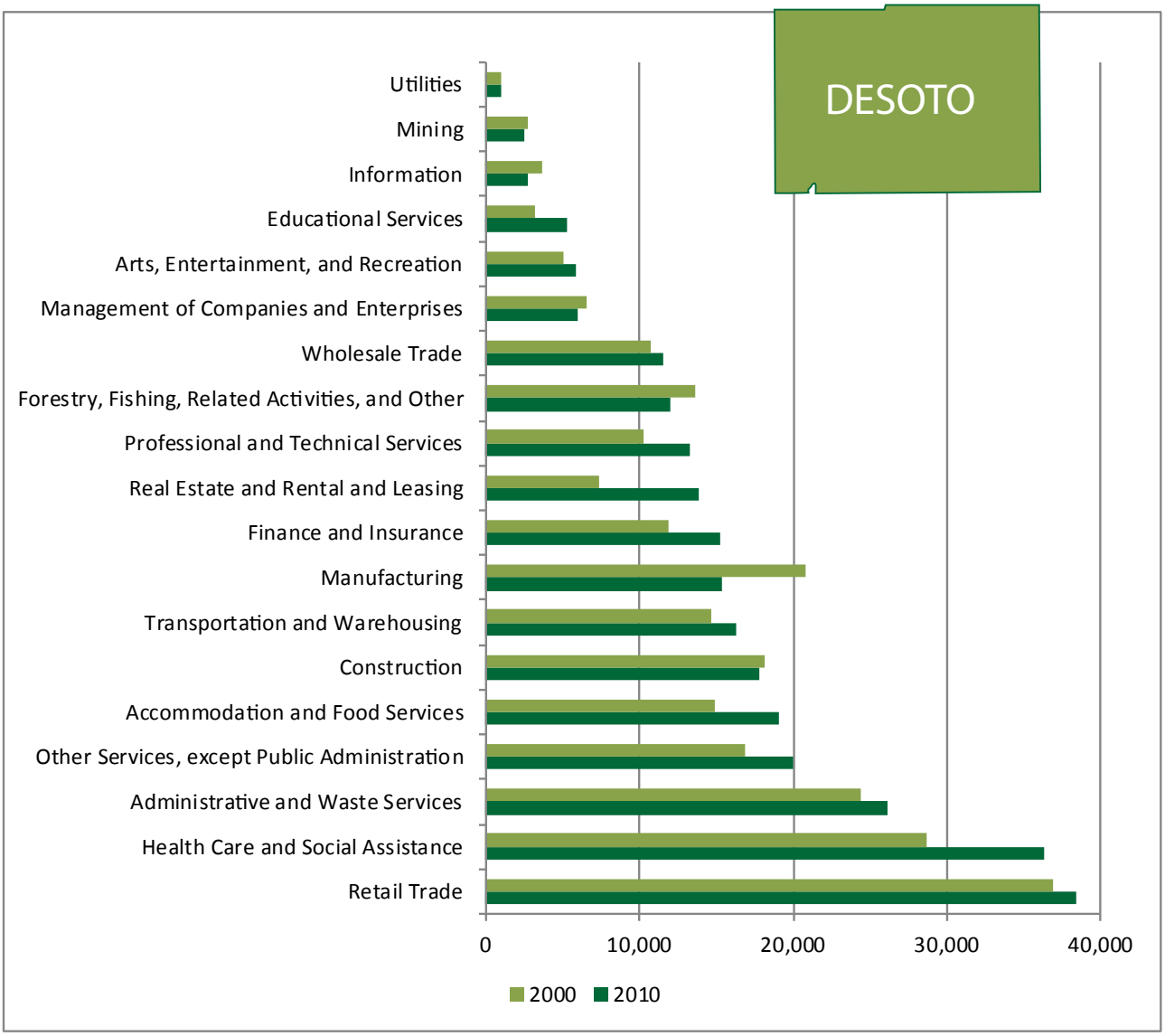


Figure 44 below indicates that in 2000, approximately 83 percent of employment in the Central Florida Region was in the Private Non-Agricultural sector while 13 percent of employment was in the Government sector and 4 percent was in the Agricultural sector.

Figure 45 below indicates that by 2010, the distribution of employment had shifted slightly, with 84 percent in the Private Non-Agricultural sector and 3 percent in the Agricultural sector.

Figure 44. Central Florida Region Total Employment, 2000

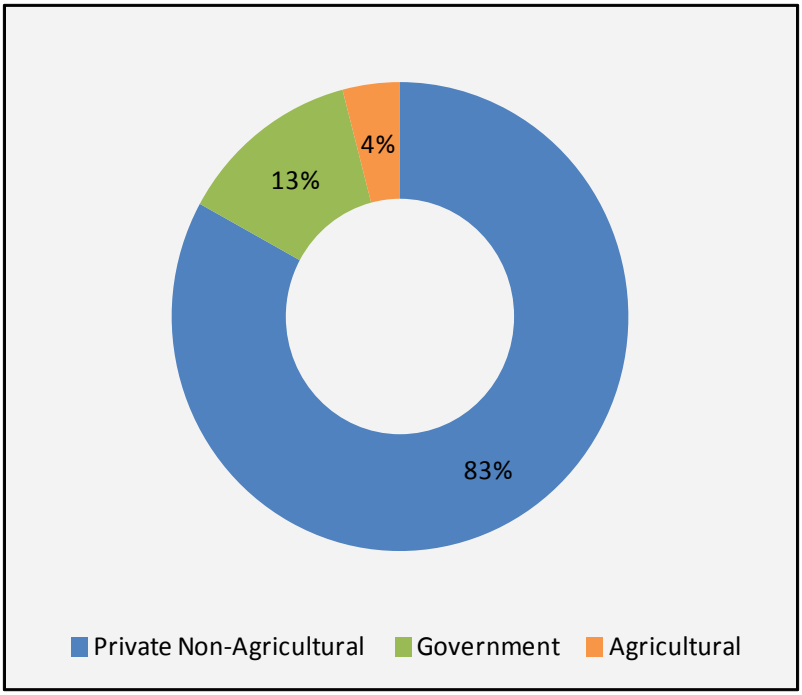
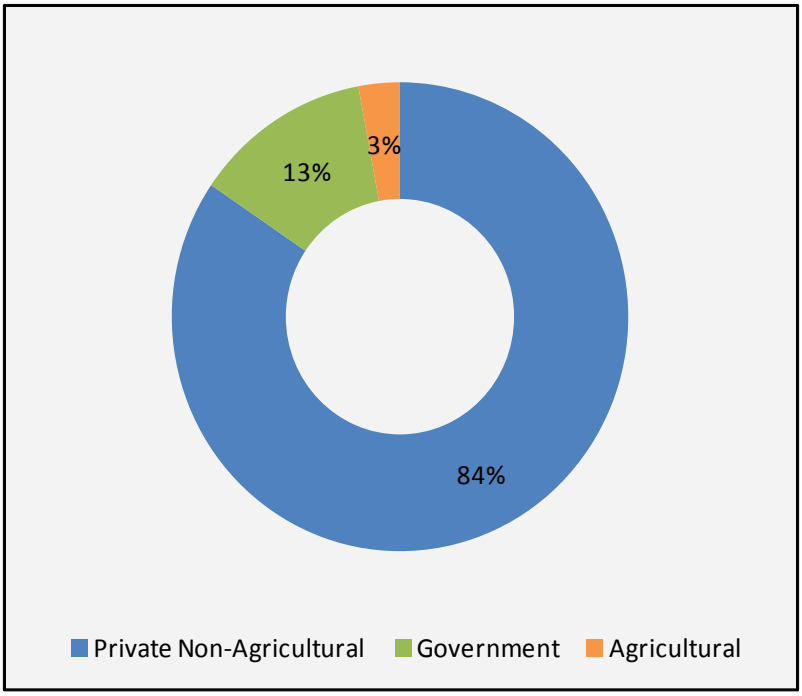


Figure 45. Central Florida Region Total Employment, 2010



Employment by Industry – By County

The following section provides a breakdown of employment by industry for each county within the study area.

DeSoto County

Area: 640 sq mi (land and water)

Established: 1887

Population (2010): 34,862

Largest employment industries: Forestry, Fishing, and Related Activities; Retail Trade

County Seat: Arcadia

Median age (2005-2009): 35.6

Incorporated Communities: City of Arcadia

DeSoto County – Employment by Industry (2000 – 2010)

Tables 42 and 43 provide the categories of employment by industry in DeSoto County. Categories include the Private Non-Agricultural sector (Table 44) and total employment (including Government and Agricultural categories) (Table 43). Employment figures are provided for the years 2000 and 2010, in order to provide an overview of industry over time in DeSoto County.

Table 43 provides a summary of total employment in DeSoto County, including the Private Non-Agricultural, Government, and Agricultural sectors. In 2000, the total number of employees in DeSoto County was 12,989. In 2010, the total was 13,521, an increase of 4 percent. The Government sector decreased by 19.4 percent, from 2,887 employees in 2000 to 2,326 in 2010. The Agricultural sector decreased by 23.0 percent, from 1,743 employees in 2000 to 1,341 in 2010.

Table 43. DeSoto County - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	8,359	9,854	1,495	17.9%
Government	2,887	2,326	-561	-19.4%
Agricultural	1,743	1,341	-402	-23.0%
Total	**12,989**	**13,521**	**532**	**4.1%**

Table 44 indicates the number of persons employed by industry within DeSoto County in both 2000 and 2010. The industries listed employed 8,359 people in 2000. In 2010, the industries employed 9,854, an increase of 17.9 percent. The largest category of Private Non-Agricultural sector employers was Forestry, Fishing, and Related Activities. The second largest employer in the DeSoto County was Retail Trade.

Table 44. DeSoto County - Employment by Industry

Industry	2000	2010	Change	Percent Change
Forestry, Fishing, Related Activities, and Other	3,120	2,483	-637	-20.4%
Retail Trade	1,110	1,877	767	69.1%
Health Care and Social Assistance	743	1,066	323	43.5%
Other Services, except Public Administration	606	649	43	7.1%
Construction	460	569	109	23.6%
Administrative and Waste Services	290	509	219	75.7%
Manufacturing	356	494	138	38.9%
Accommodation and Food Services	414	441	27	6.5%
Real Estate and Rental and Leasing	241	406	165	68.7%
Professional and Technical Services	159	304	145	91.5%
Finance and Insurance	199	304	105	52.9%
Wholesale Trade	222	247	25	11.1%
Transportation and Warehousing	144	210	66	46.0%
Arts, Entertainment, and Recreation	123	112	-11	-9.0%
Management of Companies and Enterprises	62	81	19	31.4%
Information	45	45	0	-0.6%
Educational Services	5	29	24	477.3%
Utilities	57	27	-30	-53.1%
Mining	3	3	0	0%
Total	**8,359**	**9,854**	**1,495**	**17.9%**

Figure 46 below illustrates the growth of 15 of the 19 industry categories between 2000 and 2010. Four industry categories—Forestry/Fishing, Arts/Entertainment/Recreation, Utilities, and Mining—declined during the 8-year time frame. The largest absolute increases were in the categories of Retail Trade (an increase of 767 jobs) and Health Care (an increase of 323 jobs).

Figure 46. Private Non-Agricultural Employment by Indu ty

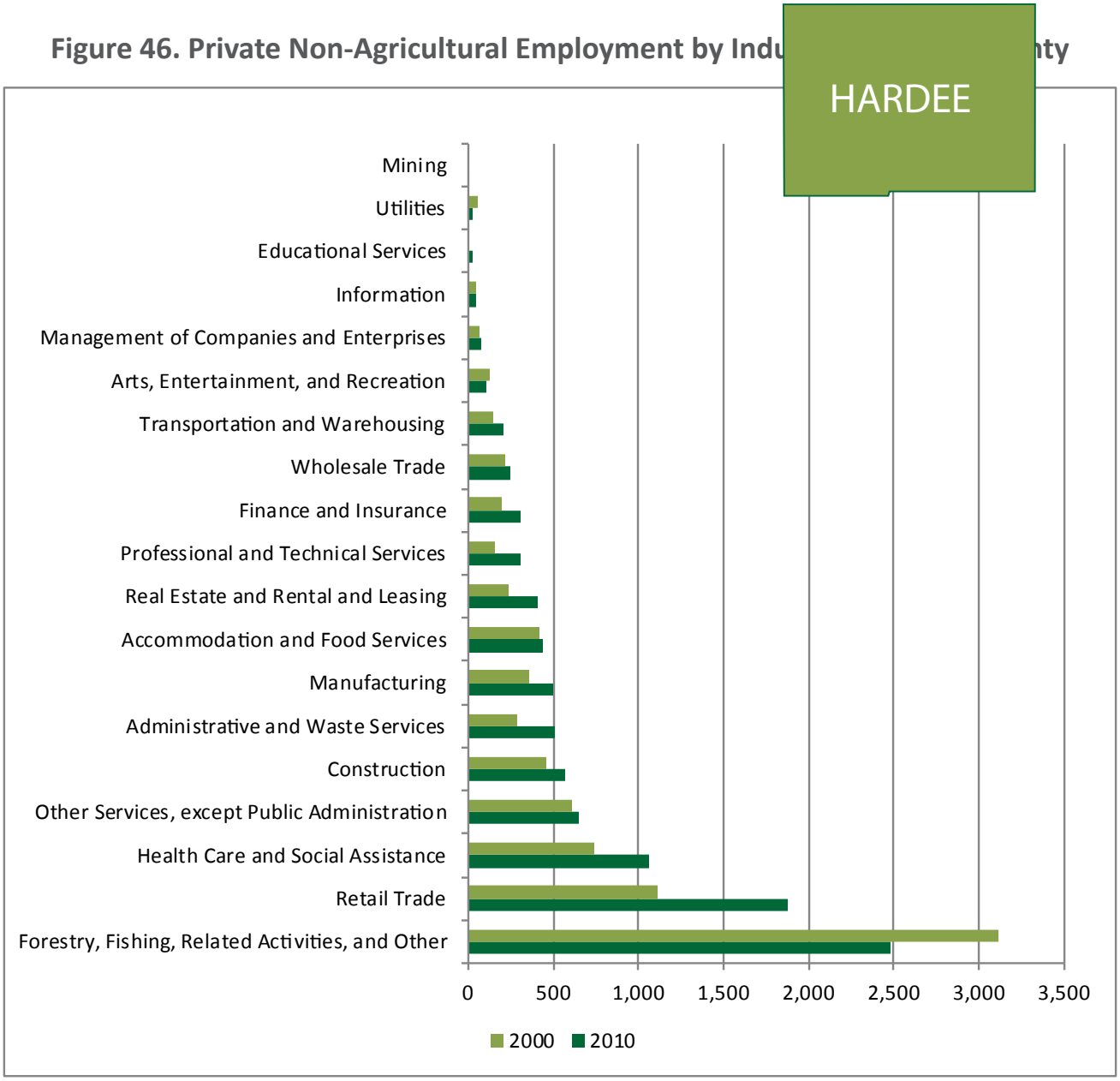


Figure 47 below indicates that in 2000, approximately 64 percent of employment in DeSoto County was in the Private Non-Agricultural sector, while 22 percent of employment was in the Government sector and 14 percent was in the Agricultural sector.

Figure 48 below indicates that in 2010, approximately 73 percent of employment in DeSoto County was in the Private Non-Agricultural sector, while 17 percent was in the Government sector and 10 percent was in the Agricultural sector.

Figure 47. DeSoto County Total Employment, 2000

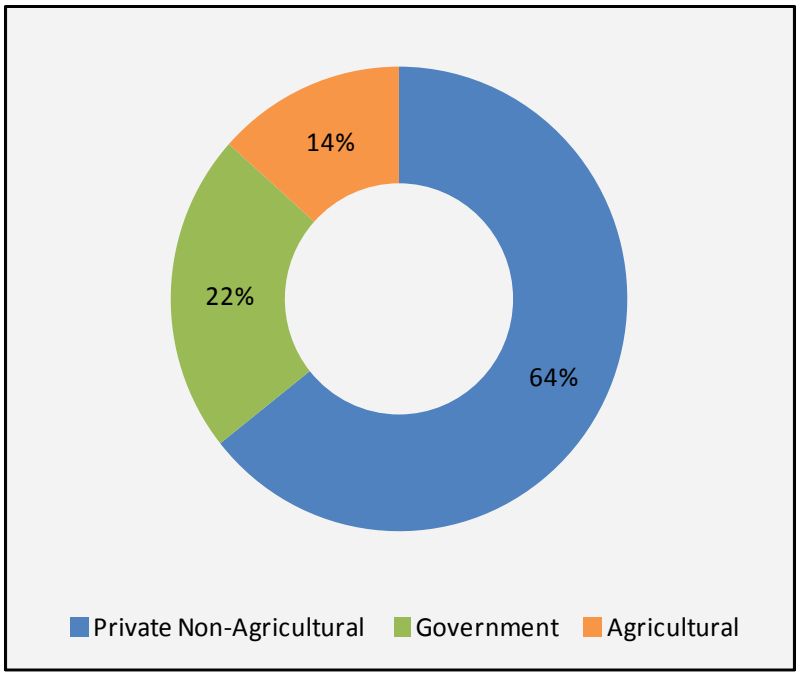
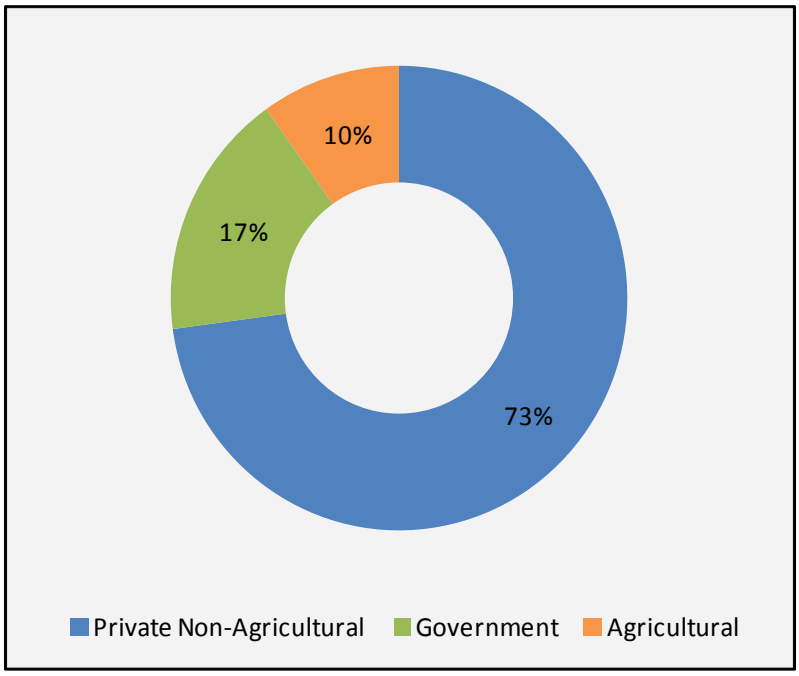


Figure 48. DeSoto County Total Employment, 2010



Hardee County

Area: 638 sq mi (land and water)

Established: 1921

Population (2010): 27,731

Largest employment industries: Health Care and Social Assistance; Forestry, Fishing and Related Activities

County Seat: Wauchula

Median age (2005-2009): 32.8

Incorporated Communities: City of Bowling Green, City of Wauchula, Town of Zolfo Springs

Hardee County – Employment by Industry (2000 – 2010)

Tables 45 and 46 provide the categories of employment by industry in Hardee County. Categories include the Private Non-Agricultural sector (Table 46) and total employment, including the Government and Agricultural categories (Table 45). Employment figures are provided for the years 2000 and 2010, in order to provide an overview of industry over time in Hardee County.

Table 45 provides a summary of total employment in Hardee County, including the Private Non-Agricultural, Government, and Agricultural sectors. In 2000, the total number of employees in Hardee County was 11,027. In 2010, the total was 11,071, an increase of 0.4 percent. The Government sector increased by 5 employees, from 1,770 in 2000 to 1,775 in 2010. The Agricultural sector decreased by 24.8 percent, from 1,877 employees in 2000 to 1,412 in 2010.

Table 45. Hardee County - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	7,380	7,884	504	6.8%
Government	1,770	1,775	5	0.3%
Agricultural	1,877	1,412	-465	-24.8%
Total	**11,027**	**11,071**	**44**	**0.4%**

Table 46 indicates the number of persons employed by private non-agricultural industry within Hardee County in 2000 and 2010. The industries listed employed 7,380 people in 2000. In 2010, the industries employed 7,884, an increase of 6.8 percent. The largest categories of Private Non-Agricultural sector employers were Forestry, Fishing, and Related Activities; Retail Trade; and Health Care and Social Assistance.

Table 46. Hardee County - Employment by Industry

Industry	2000	2010	Change	Percent Change
Health Care and Social Assistance	942	1,365	423	44.9%
Forestry, Fishing, Related Activities, and Other	1,663	1,103	-560	-33.7%
Retail Trade	963	911	-52	-5.4%
Transportation and Warehousing	655	766	111	16.9%
Other Services, except Public Administration	578	583	5	0.8%
Accommodation and Food Services	248	405	157	63.2%
Finance and Insurance	293	345	52	17.9%
Construction	346	333	-13	-3.9%
Administrative and Waste Services	269	319	50	18.7%
Manufacturing	226	292	66	29.2%
Wholesale Trade	256	277	21	8.3%
Utilities	164	270	106	64.6%
Real Estate and Rental and Leasing	155	253	98	63.2%
Professional and Technical Services	258	250	-8	-3.3%
Mining	161	197	36	22.6%
Arts, Entertainment, and Recreation	49	111	62	126.4%
Information	62	68	6	9.8%
Management of Companies and Enterprises	87	19	-68	-77.8%
Educational Services	5	18	13	250.0%
Total	**7,380**	**7,884**	**504**	**6.8%**

As shown in Figure 49, Health Care and Social Assistance increased significantly, adding 423 jobs between 2000 and 2010. Forestry, Fishing, and Related Activities declined by 33.7 percent. The Retail Trade industry, another major employer, saw a slight decrease in employment numbers.

Figure 49. Private Non-Agricultural Employment [illegible]rdee County

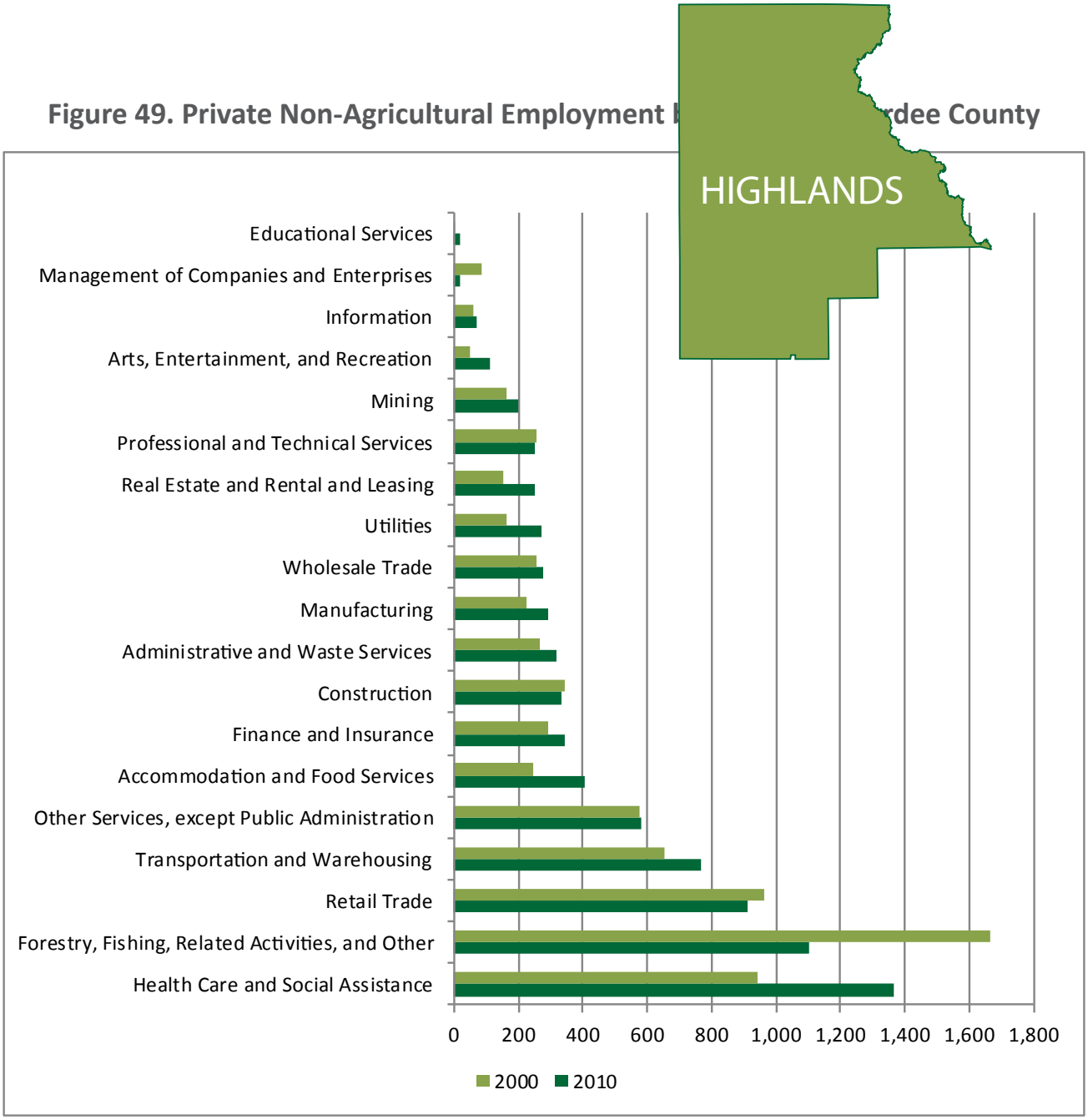


Figure 50 below indicates that in 2000, approximately 67 percent of employment in Hardee County was in the Private Non-Agricultural sector while 16 percent of employment was in the Government sector and 17 percent was in the Agricultural sector.

Figure 51 below indicates that in 2010, approximately 71 percent of employment in Hardee County was in the Private Non-Agricultural sector, while 16 percent was in the Government sector and 13 percent of employment was in the Agricultural sector.

Figure 50. Hardee County Total Employment, 2000

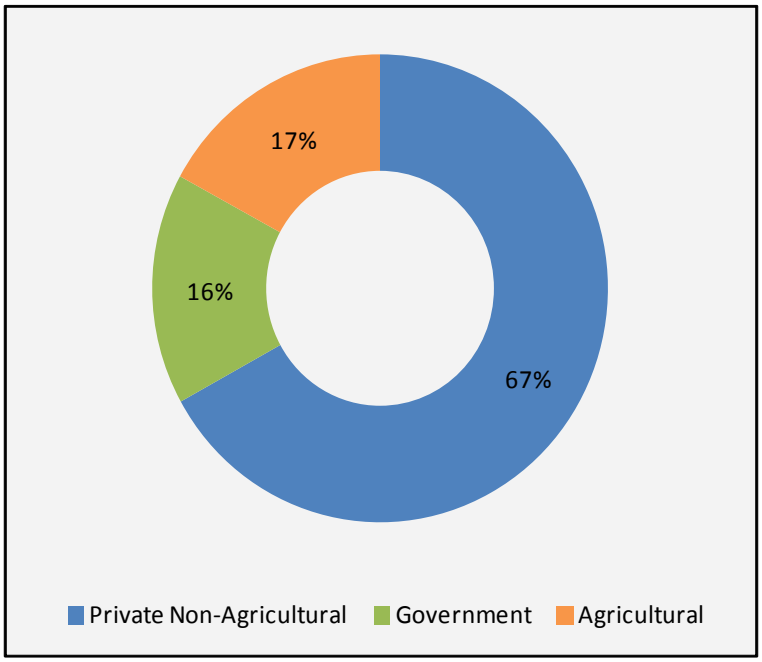
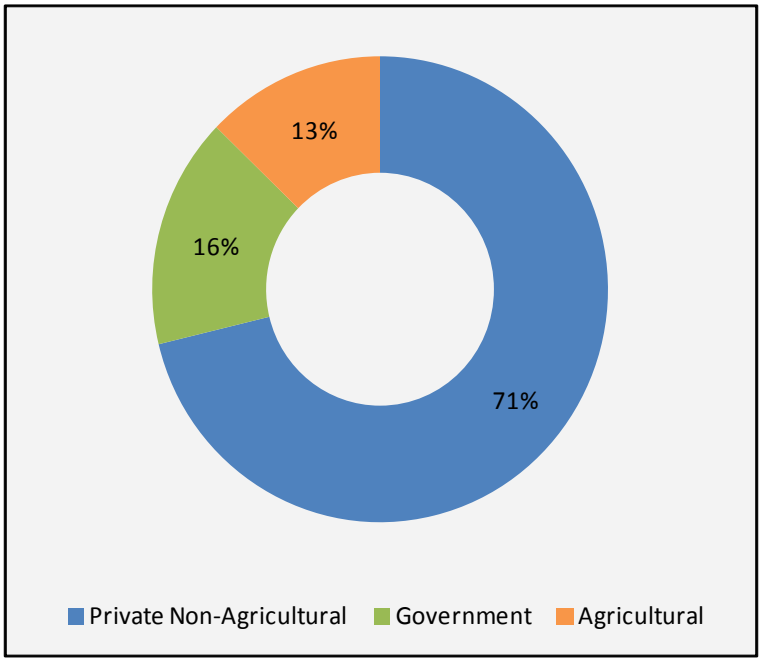


Figure 51. Hardee County Total Employment, 2010



Highlands County

Area: 1,106 sq mi (land and water)

Established: 1921

Population (2010): 98,786

Largest employment industries: Health Care Assistance; Retail Trade

County Seat: Sebring

Median age (2005-2009): 49.7

Incorporated Communities: City of Avon Park, Town of Lake Placid, City of Sebring

Highlands County – Employment by Industry (2000 – 2010)

Tables 47and 48 provide the categories of employment by industry in Highlands County. Categories include the Private Non-Agricultural sector (Table 48) and total employment, including the Government and Agricultural categories (Table 47). Employment figures are provided for the years 2000 and 2010, in order to provide an overview of industry over time in Highlands County.

Table 47 provides a summary of total employment in Highlands County, including the Private Non-Agricultural, Government, and Agricultural sectors. In 2000, the total number of employees in Highlands County was 32,670. In 2010, the total was 36,677, an increase of 12.3 percent. The Government sector increased by 5.7 percent, from 4,209 employees in 2000 to 4,451 in 2010. The Agricultural sector decreased by 4.8 percent, from 2,046 employees in 2000 to 1,948 in 2010.

Table 47. Highlands County - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	26,415	30,278	3,863	14.6%
Government	4,209	4,451	242	5.7%
Agricultural	2,046	1,948	-98	-4.8%
Total	**32,670**	**36,677**	**4,007**	**12.3%**

Table 48 indicates the number of persons employed by industry within Highlands County in both 2000 and 2010. The industries listed employed 26,415 people in 2000. In 2010, the industries employed 30,278, an increase of 14.6 percent. The largest categories of Private Non-Agricultural sector employers were Retail Trade; Health Care and Social Assistance; and Administrative and Waste Services.

Table 48. Highlands County - Employment by Industry

Industry	2000	2010	Change	Percent Change
Health Care and Social Assistance	3,913	5,340	1,427	36.5%
Retail Trade	4,524	4,990	466	10.3%
Other Services, except Public Administration	2,188	2,861	673	30.8%
Administrative and Waste Services	2,975	2,666	-309	-10.4%
Accommodation and Food Services	1,389	2,366	977	70.3%
Forestry, Fishing, Related Activities, and Other	2,703	1,796	-907	-33.6%
Construction	1,711	1,782	71	4.1%
Real Estate and Rental and Leasing	906	1,688	782	86.4%
Professional and Technical Services	1,119	1,464	345	30.8%
Finance and Insurance	980	1,266	286	29.2%
Wholesale Trade	726	777	51	7.0%
Mining	276	753	477	172.7%
Transportation and Warehousing	576	701	125	21.6%
Arts, Entertainment, and Recreation	516	675	159	30.8%
Manufacturing	1,209	540	-669	-55.3%
Information	448	242	-206	-45.9%
Educational Services	80	230	150	187.4%
Utilities	115	104	-11	-9.9%
Management of Companies and Enterprises	61	39	-22	-36.5%
Total	**26,415**	**30,278**	**3,863**	**14.6%**

Figure 52 below illustrates that growth occurred in 13 the 19 employment industry categories between 2000 and 2010. Administrative and Waste Services, Forestry/Fishing, Manufacturing, Information, Utilities, and Management of Companies and Enterprises all experienced a decline during the ten-year time frame. Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services are ma[illegible] experienced major increases from 2000 to 2010. Other employment industries that grew in[illegible]al and Leasing, Mining, Professional and Technical Services, and Finance and Insurance.

Figure 52. Private Non-Agricultural Employment by Industr[illegible] County

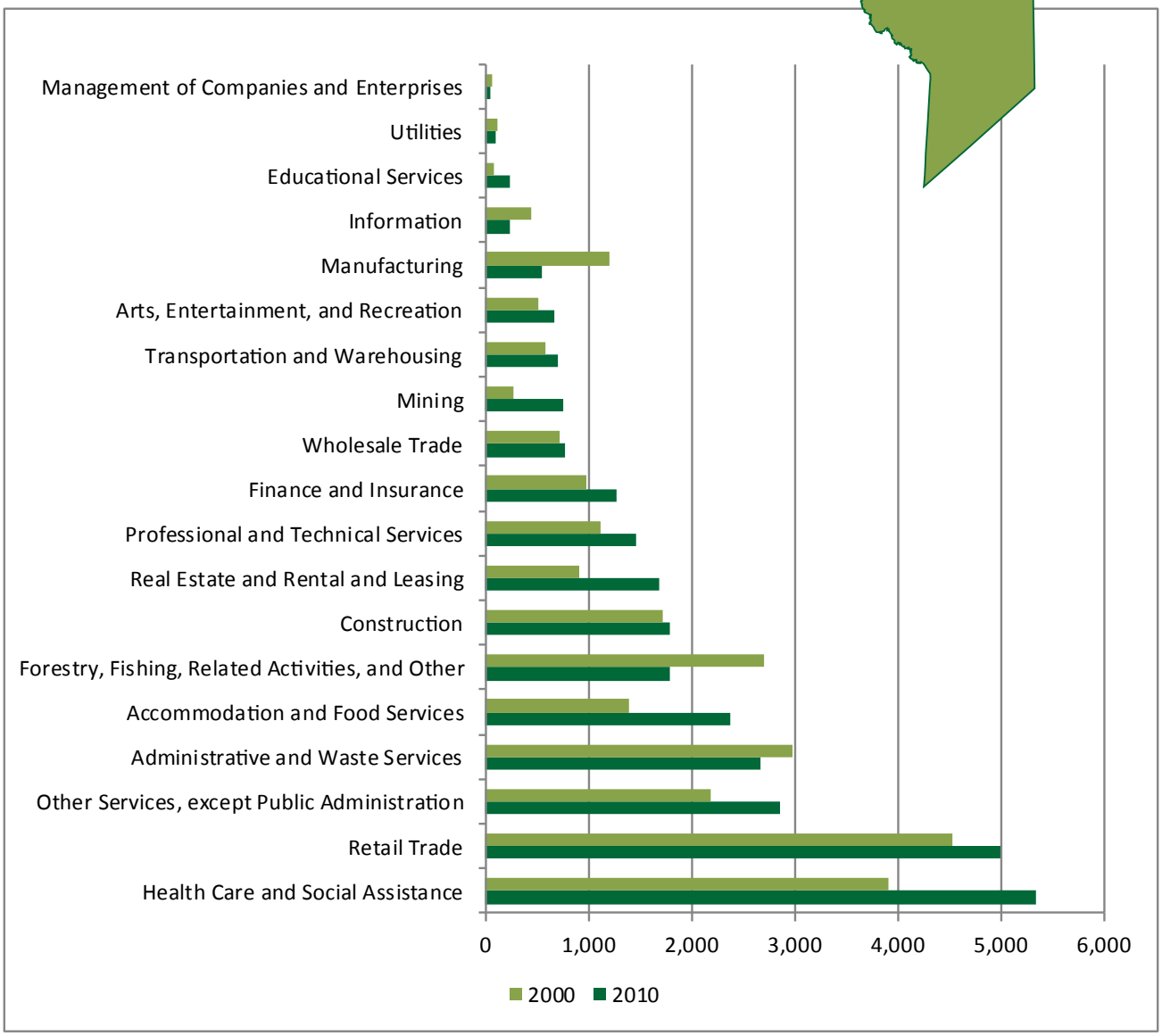


Figure 53 indicates that in 2000, approximately 81 percent of employment in Highlands County was in the Private Non-Agricultural sector while 13 percent of employment was in the Government sector and 6 percent was in the Agricultural sector.

Figure 54 below indicates that in 2010, approximately 83 percent of employment in Highlands County was in the Private Non-Agricultural sector, while 12 percent was in the Government sector and 5 percent was in the Agricultural sector.

Figure 53. Highlands County Total Employment, 2000

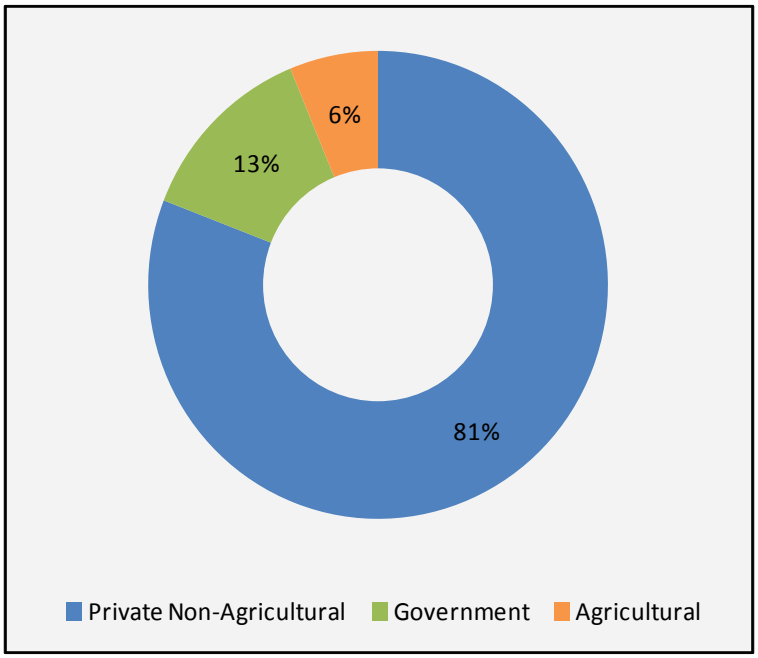
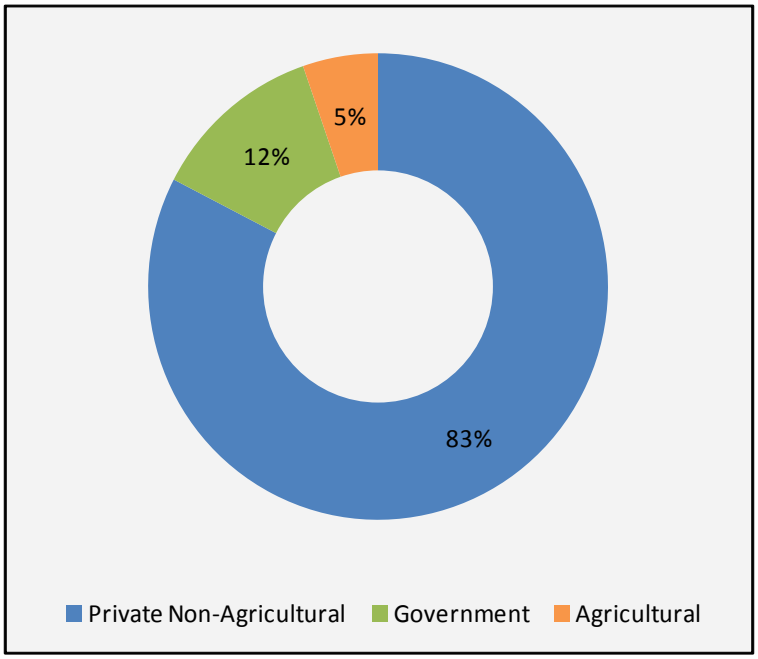


Figure 54. Highlands County Total Employment, 2010



Okeechobee County

Area: 892 sq mi (land and water)

Established: 1917

Population (2010): 39,996

Largest employment industries: Retail Trade;
Health Care and Social Assistance

County Seat: Okeechobee

Median age (2005-2009): 37.3

Incorporated Communities: City of Okeechobee

Okeechobee County – Employment by Industry (2000 – 2010)

Table 49 and Table 50 below provide the categories of employment by industry in Okeechobee County. Categories include Private Non-Agricultural sector (Table 50) and total employment, including the Government and Agricultural categories (Table 49). Employment figures are provided for the years 2000 and 2010, in order to provide an overview of industry over time in Okeechobee County.

Table 49 provides a summary of total employment in Okeechobee County, including the Private Non-Agricultural, Government, and Agricultural sectors. In 2000, the total number of employees in Okeechobee County was 12,893. In 2010, the total was 13,251, an increase of 2.8 percent. The Government sector increased by 480 employees (25.3 percent). The Agricultural sector underwent a notable decrease of 34.7 percent, from 1,961 employees in 2000 to 1,280 in 2010.

Table 49. Okeechobee County - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	9,032	9,591	559	6.2%
Government	1,900	2,380	480	25.3%
Agricultural	1,961	1,280	-681	-34.7%
Total	**12,893**	**13,251**	**358**	**2.8%**

Table 50 shows the number of persons employed by Private Non-Agricultural sector industries within Okeechobee County in 2000 and 2010. The industries listed employed 9,032 people in 2000 and 9,591 in 2010 equaling a 6 percent increase. The largest categories of industry were Retail Trade, Health Care and Social Assistance, and Accommodation and Food Services. However, Retail Trade and Health Care experienced declines in employment from 2000 to 2010.

Table 50. Okeechobee County - Employment by Industry

Industry	2000	2010	Change	Percent Change
Retail Trade	1,882	1,632	-250	-13.3%
Health Care and Social Assistance	1,718	1,577	-141	-8.2%
Accommodation and Food Services	846	1,058	212	25.1%
Other Services, except Public Administration	724	815	91	12.5%
Construction	655	797	142	21.7%
Administrative and Waste Services	458	695	237	51.6%
Forestry, Fishing, Related Activities, and Other	620	630	10	1.7%
Transportation and Warehousing	540	435	-105	-19.5%
Professional and Technical Services	388	416	28	7.3%
Finance and Insurance	242	270	28	11.5%
Real Estate and Rental and Leasing	202	266	64	31.5%
Manufacturing	243	247	4	1.7%
Wholesale Trade	169	214	45	26.9%
Educational Services	4	198	194	4846.1%
Information	113	107	-6	-5.6%
Arts, Entertainment, and Recreation	189	101	-88	-46.4%
Management of Companies and Enterprises	2	62	60	2993.4%
Mining	7	45	38	548.6%
Utilities	30	26	-4	-13.5%
Total	**9,032**	**9,591**	**559**	**6.2%**

Figure 55 below illustrates that growth occurred in 13 of the 19 employment industry categories between 2000 and 2010. Retail Trade, Health Care and Social Assistance, Transportation and Warehousing, Arts/Entertainment/ Recreation, Information, and Utilities experienced a decline in employment. Growing industries include Accommodation and Food Services, Construction, Administrative and Waste Services, and Real Estate and Rental and Leasing. Mining, although a very small sector, experienc[illegible]ve increase, from 7 employees in 2000 to 45 in 2010.

Figure 55. Private Non-Agricultural Employn[illegible]chobee County

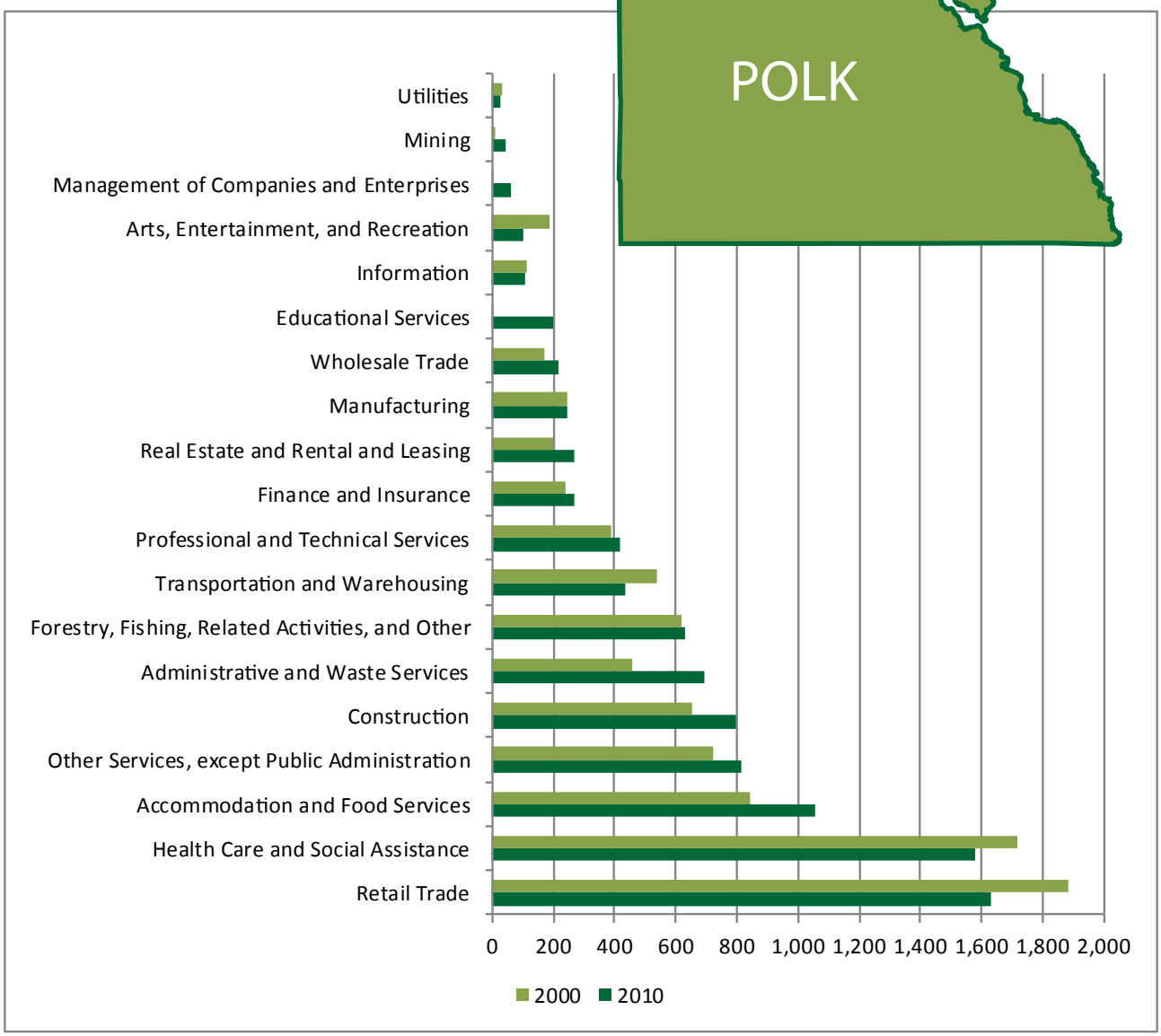


Figure 56 below indicates that in 2000, approximately 70 percent of employment in Okeechobee County was in the Private Non-Agricultural sector, while 15 percent of employment was in the Government sector and 15 percent was in the Agricultural sector.

Figure 57 below indicates that in 2010, approximately 72 percent of employment in Okeechobee County was in the Private Non-Agricultural sector, while 18 percent was in the Government sector and 10 percent of employment was in the Agricultural sector.

Figure 56. Okeechobee County Total Employment, 2000

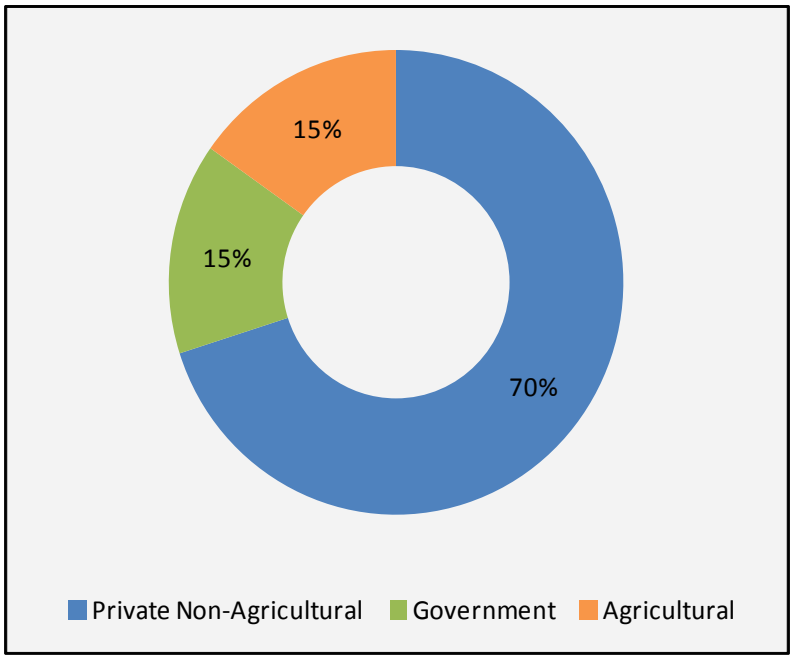
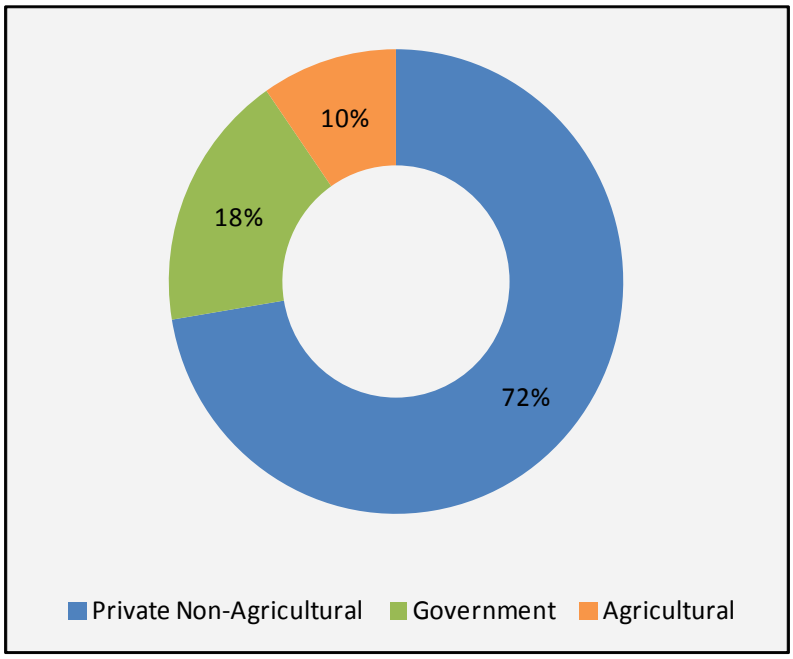


Figure 57. Okeechobee County Total Employment, 2010



Polk County

Area: 2,010 sq mi (land and water)

Established: 1861

Population (2010): 602,095

Largest employment industries: Retail Trade;
Health Care and Social Assistance

County Seat: Bartow

Median age (2005-2009): 38.7

Incorporated Communities: City of Bartow,
City of Davenport, Town of Dundee,
City of Eagle Lake, City of Fort Meade,
City of Frostproof, City of Haines City,
Village of Highlands Park, Town of
Hillcrest Heights, City of Lake Alfred,
Town of Lake Hamilton, City of Lakeland,
City of Lake Wales, City of Mulberry,
Town of Polk City, and City of Winter Haven

Polk County – Employment by Industry (2000 – 2010)

Table 51 and Table 52 below show the categories of employment by industry in Polk County. Categories include the Private Non-Agricultural sector (Table 52) and total employment, including the Government and Agricultural categories (Table 51). Employment figures are provided for the years 2000 and 2010, in order to provide a view of industry over time in Polk County.

Table 51 provides a summary of total employment in Polk County, including the Private Non-Agricultural, Government, and Agricultural sectors. In 2000, the total number of employees in Polk County was 233,567. In 2010, the total was 255,088, an increase of 9.2 percent. The Government sector increased by 6.9 percent, from 28,516 employees in 2000 to 30,496 in 2010. The Agricultural sector decreased by 21.4 percent, from 4,597 employees in 2000 to 3,614 in 2010.

Table 51. Polk County - Total Employment

Industry	2000	2010	Change	Percent Change
Private Non-Agricultural	200,454	220,977	20,523	10.2%
Government	28,516	30,496	1,980	6.9%
Agricultural	4,597	3,614	-983	-21.4%
Total	**233,567**	**255,088**	**21,521**	**9.2%**

Table 52 indicates the number of persons employed by industry within Polk County in both 2000 and 2010. The industries listed employed 200,454 people in 2000. In 2010, the industries employed 220,977, an increase of 10.2 percent. The largest categories of Private Non-Agricultural sector employers were Retail Trade, Health Care and Social Service, Administrative and Waste Services, and Construction.

Table 52. Polk County - Employment by Industry

Industry	2000	2010	Change	Percent Change
Retail Trade	28,436	29,022	586	2.1%
Health Care and Social Assistance	21,394	26,964	5,570	26.0%
Administrative and Waste Services	20,393	21,898	1,505	7.4%
Other Services, except Public Administration	12,810	15,048	2,238	17.5%
Accommodation and Food Services	12,036	14,752	2,716	22.6%
Construction	15,009	14,269	-740	-4.9%
Transportation and Warehousing	12,798	14,192	1,394	10.9%
Manufacturing	18,750	13,844	-4,906	-26.2%
Finance and Insurance	10,193	13,091	2,898	28.4%
Real Estate and Rental and Leasing	5,829	11,202	5,373	92.2%
Professional and Technical Services	8,386	10,886	2,500	29.8%
Wholesale Trade	9,345	9,973	628	6.7%
Forestry, Fishing, Related Activities, and Other	5,548	6,003	455	8.2%
Management of Companies and Enterprises	6,403	5,767	-636	-9.9%
Arts, Entertainment, and Recreation	4,226	4,845	619	14.7%
Educational Services	3,112	4,816	1,704	54.8%
Information	2,946	2,324	-622	-21.1%
Mining	2,251	1,521	-730	-32.4%
Utilities	589	560	-29	-5.0%
Total	**200,454**	**220,977**	**20,523**	**10.2%**

Figure 58 below illustrates that growth occurred in 13 of the 19 employment industry categories between 2000 and 2010. Manufacturing, Construction, Management of Companies and Enterprises, Information, Mining, and Utilities all experienced a decline during the ten-year time frame. Retail Trade, Health Care and Social Assistance, Administrative and Waste Services, and Other Services are major employers that experienced employment increases between 2000 and 2010.

Figure 58. Private Non-Agricultural Employment by Industry – Polk County

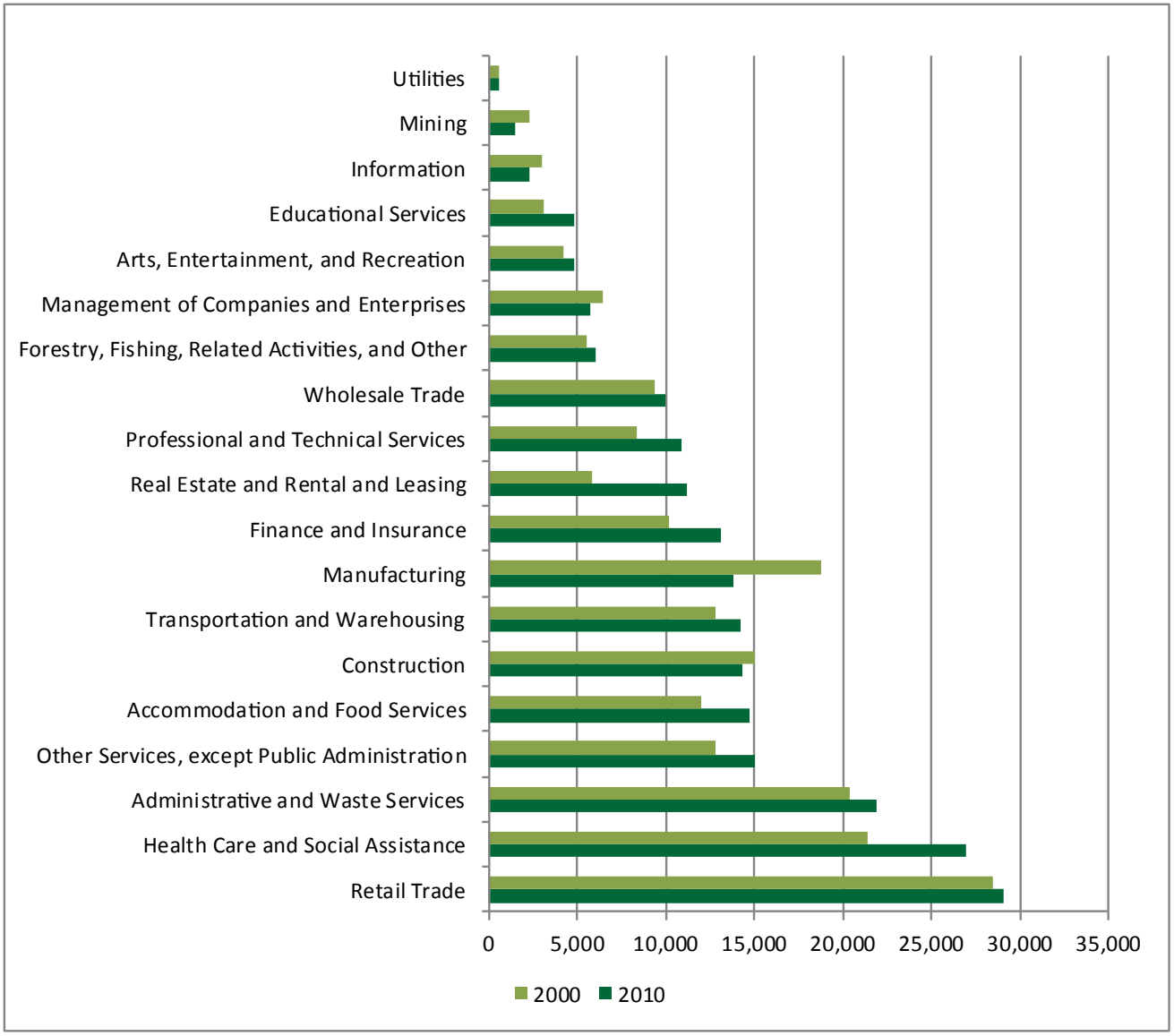


Figure 59 below indicates that in 2000, approximately 86 percent of employment in Polk County was in the Private Non-Agricultural sector while 12 percent of employment was in the Government sector and 2 percent was in the Agricultural sector.

Figure 60 below indicates that in 2010, approximately 87 percent of employment in Polk County was in the Private Non-Agricultural sector, while 12 percent was in the Government sector and 1 percent of employment was in the Agricultural sector.

Figure 59. Polk County Total Employment, 2000

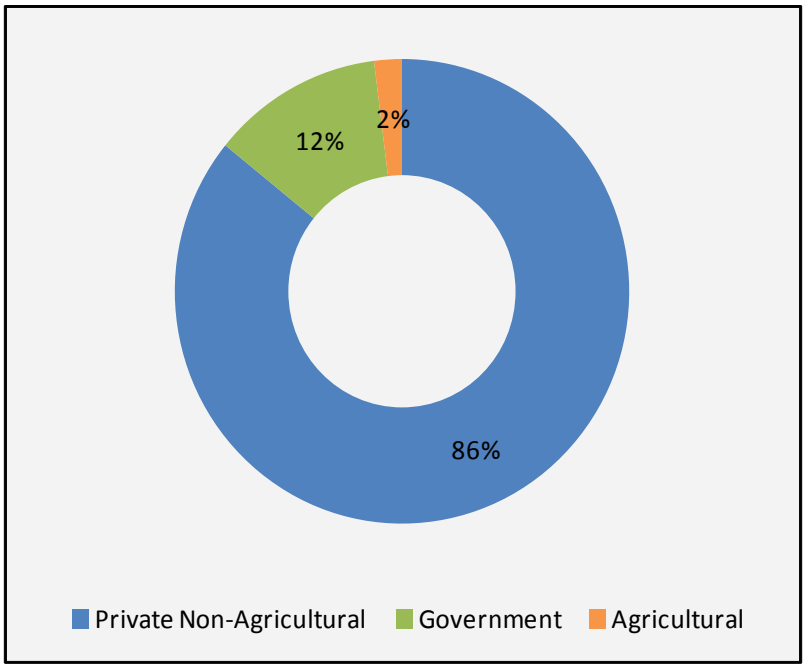
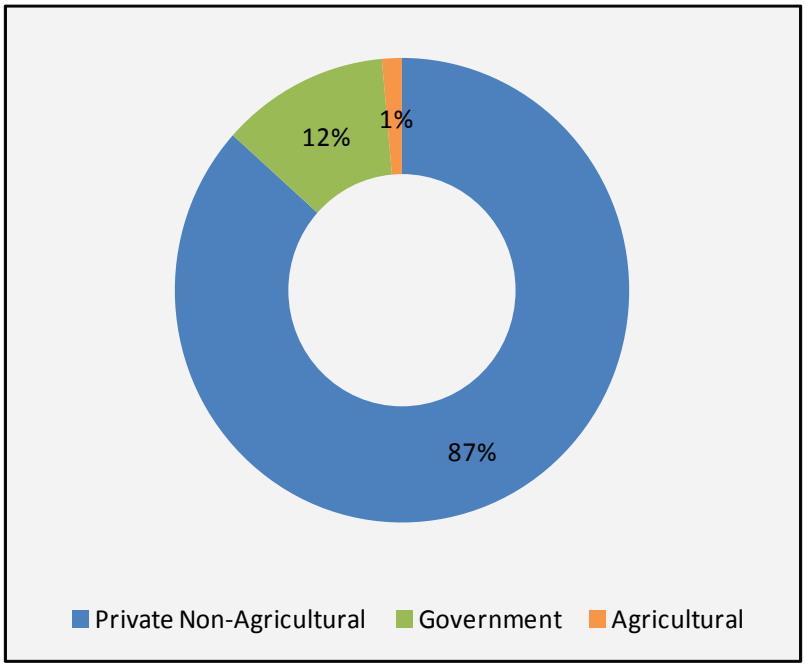


Figure 60. Polk County Total Employment, 2010



Conclusions

At the regional level, the industry clusters in this analysis with the greatest absolute gains in employment between 2000 and 2010 were Health Care and Social Assistance (7,602 jobs added), Real Estate and Rental and Leasing (6,483 jobs added), and Accommodation and Food Services (4,089 jobs added). Manufacturing had the greatest absolute decline (5,367 jobs lost). This cluster also saw the highest relative decline (25.8 percent). The clusters with the greatest relative growth were Real Estate and Rental and Leasing (88.4 percent) and Educational Services (65 percent). Although these trends were evident from 2000-2010 data, these same trend patterns are not expected to continue during the course of the next five years.

The five individual counties in the region each show distinct economic patterns. As of 2010, 77 percent of the jobs in the five-county region were in Polk County; therefore, employment trends measured across the entire region are similar to those in Polk, while the other four counties show different trends.

In DeSoto, Hardee, Highlands, and Okeechobee Counties, the two industry clusters that experienced the greatest relative growth were Mining (in which employment increased by 123 percent, from 447 to 995 jobs) and Educational Services (a smaller cluster, which increased by 404 percent from 94 to 474 jobs). The greatest relative declines were in Information (31 percent), Forestry, Fishing, Related Activities, and Other (26 percent), Manufacturing (23 percent), and Agriculture (22 percent). The greatest absolute increases were in Health Care and Social Assistance (2,032 jobs added), Accommodation and Food Services (1,373 jobs added), and Real Estate and Rental and Leasing (1,109 jobs added). The greatest absolute declines were in Agriculture (1,646 jobs lost) and Forestry, Fishing, Related Activities, and Other (2,094 jobs lost).

These regional trends show that in terms of the number of employees, employment in the region has shifted away from the traditionally important industries of agriculture (particularly citrus and cattle production) and phosphate mining. Although these industries together still consume a large portion of the region's land, they employ a small number of the region's workers. (As of 2010, Mining employed 0.8 percent of the workers in the five-county region and Agriculture employed 2.9 percent).

With regard to key growth industries in the region, three major trends are noticeable. Firstly, employment in region has shifted toward service-providing industry clusters (away from goods-producing clusters). This is evident from the growth in clusters such as Retail Trade (the top employer in the region) and Accommodation and Food Services. Secondly, the region is shifting toward an economy that employs more highly qualified and educated workers, as evident from the strong growth in professionally-oriented clusters such as Health Care and Social Assistance, Finance and Insurance, and Professional and Technical Services. Lastly, growth has been evident in industry clusters associated with tourism and entertainment, such as Arts, Entertainment, and Recreation (14.5 percent) and Accommodation and Food Services (27.4 percent). This suggests that the region is gaining status as a destination for recreation and tourism, and may still have untapped potential in this regard.

State and Local Economic Development Plans

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

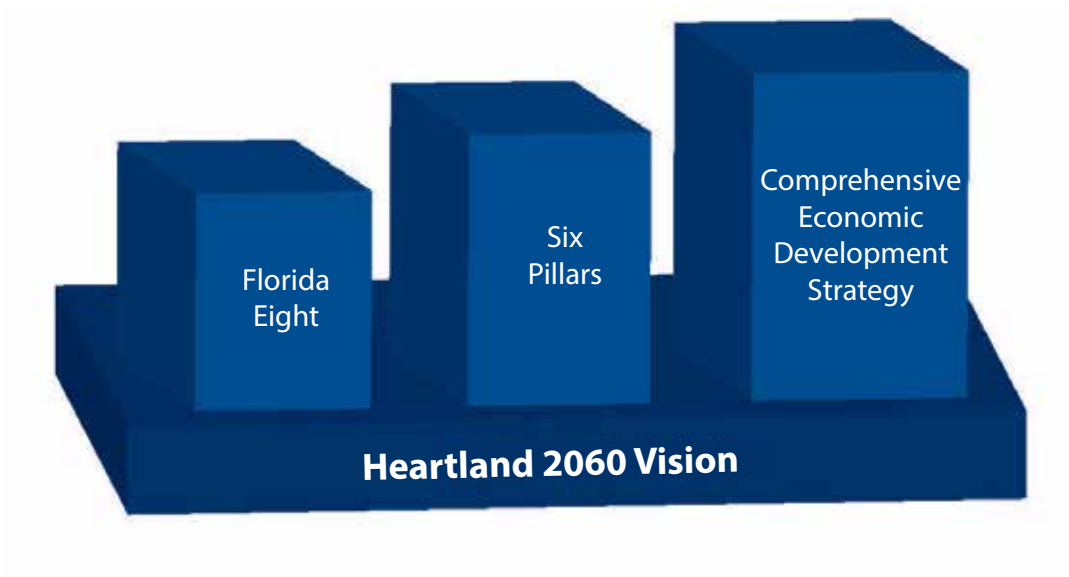
The Central Florida Economic Development District (CFEDD) is involved in many efforts that coordinate within the state of Florida or within the region. These include: the state's economic development agencies of Enterprise Florida and the Department of Economic Opportunity (DEO); the Florida Regional Planning Councils Association (FRCA); the Florida Regional Economic Development Initiative (FHREDI), as well as local economic development councils. The CFRPC has a working partnership with Heartland Workforce and the region's major colleges and universities. Transportation is one of the key issues with the Central Florida EDD. Development of a balanced system utilizing the existing road network and developing future transportation corridors for movement of goods and people requires ongoing coordination with the Florida Department of Transportation (FDOT, District One) and with local governments. CFEDD staff serves on the Polk County Transportation Planning Organization (TPO's) Technical Advisory Committee (currently the only metropolitan planning organization in the region) and staffs and coordinates the Heartland Rural Mobility Plan Initiative in the southern rural counties.

The CFEDD will continue to work with key economic development partners in local communities and at the regional and state level to move forward existing plans for economic diversification and responsible development. The region's rural counties are defined by the State as a Rural Areas of Critical Economic Concern, a designation that carries planning resources and incentives.

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

A current initiative known as the Year of Economic Engagement, which is a coordinated effort between the CFEDD, the Heartland 2060 Consortium, Heartland Workforce, FHREDI, and Polk Vision, targets regional collaboration and the furtherance of common economic development goals and activities. The Heartland 2060 Vision plan is serving as the foundation for Building Blocks of the Heartland, which harnesses goals and principals of education, workforce, and economic development, tying together the CEDS with the Florida Eight and the Six Pillars (a structure for statewide public and private sector strategic planning) (see Figure 61).

Figure 61. Building Blocks for the Future of the Heartland



Building Blocks for the Future of the Heartland

Florida Eight

Building regional capacity, job and business retention, international diversification, and empowering regional collaboration.

Six Pillars

Strategic planning for securing Florida's future through deliberations of the Six Pillars Caucus System, the State Strategic Plan and guiding goals and vision for the Heartland 2060.

Comprehensive Economic Development Strategy

Analyzing the regional economy and creating a road map to economic diversity through private sector investment and job creation.

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

1. Central Florida Regional Planning Council Strategic Regional Policy Plan; adopted April 28, 1997.
2. The Status of South Central Florida's Regional Economy; An Update, dated May 2001; prepared for the CFRPC by the Center for Economic Development Research, College of Business Administration, University of South Florida.
3. New Cornerstone- A Vision for Florida's Economic Future; prepared for the Florida Chamber Foundation, 2003, Research by Cambridge Systematics, Inc.
4. Rural Area of Critical Economic Concern Catalyst Project for South Central Florida, Target Industry Report; April 2007
5. Central Florida Cluster Study: Industry Cluster Assessment & Selection; SRI International (2008).
6. Hardee, Highlands and DeSoto Tri-County Industry Cluster Analysis; SRI International 2010.
7. Roadmap to Florida's Future; Enterprise Florida 2010-2015
8. Florida's 2011-2012 Workforce Investment Act Plan Modification
9. Statewide Strategic Plan for Economic Development: Rural Priority, 2006-2008; Enterprise Florida, Inc. (To be finalized 7.13.12)
10. Florida Five Year Statewide Strategic Plan, 2012; Florida Department of Economic Opportunity

Regional Economic Development Investments

There are several major economic development investments underway and planned for the future of the region that will positively impact the residents and business communities. These investments are critical for the long term health of the region's economic development and its diversity.

Research and Development

The Polk Commerce Centre is a planned development containing a 284-acre interstate activity center, a 379-acre mixed use area, and 297 acres of conservation land near the eastern interchange of Interstate 4 and the Polk Parkway. Revenue for the project is provided by the Polk Commerce Centre Community Redevelopment Area.[40]

Florida Polytechnic University will be Florida's 12th state university. The new campus is under construction near the intersection of Interstate 4 and the Polk Parkway, approximately 10 miles northeast of downtown Lakeland. The $98 million (Phase I) project will be financed with funding previously earmarked for the Lakeland campus of the University of South Florida. [41]

[40] The Lakeland Ledger (Dec. 9, 2009). "Planners OK Polk Commerce Centre Changes" (retrieved July 11, 2012).
[41] The Lakeland Ledger (May 14, 2012). "Construction of Futuristic Structure Expected to Be Completed in 20 Months." (retrieved July 11, 2012).

Logistics

The CSX Integrated Logistics Center (ILC) in Winter Haven will include an intermodal freight hub, warehousing facilities, and a commerce park on a 1,250-acre site. The ILC phase of 320 acres is under construction in 2012. Full development of the project is expected to generate thousands of jobs. The ILC will handle freight train traffic diverted from existing rail lines in order to accommodate SunRail, Orlando's under-construction commuter rail system. [42]

Although it is outside the five-county region covered in this Comprehensive Economic Development Strategy, the Americas Gateway Logistics Center (AGLC) in Glades County will have a significant economic impact on the Heartland Region. Located near the City of Moore Haven, along five miles of rail frontage, the AGLC is a master-planned logistical center project on 6,700 acres of land, and will include manufacturing operations and distribution centers, an intermodal center and other transportation/logistics service-related facilities. The Center will serve as an export and import hub for emerging markets in Latin America as well as Asian markets via the Port of Miami, Port Everglades, Port Manatee, Port of Palm Beach, the newly designated Airglades International Airport, and three south Florida international airports. Americas Gateway Logistics Center is being implemented through a partnership between Lykes Bros., Inc. and A. Duda & Sons, Inc.[43]

Renewable Energy

Solar Energy

The DeSoto Next Generation Solar Energy Center, operated by Florida Power and Light, opened in October 2009 as the largest solar photovoltaic plant in the country (at 25 megawatts). Annual estimated generation is about 42,000 megawatt-hours, or enough power to serve about 3,000 homes. The plant consists of more than 90,500 solar panels, and will decrease fossil-fuel usage by approximately 7 billion cubic feet of natural gas and 277,000 barrels of oil, equivalent to removing more than 4,500 cars from the road each year for the 30-year life of the project.[44]

The 5.65-megawatt Lakeland Electric Solar Farm, located near Lakeland Linder Regional Airport, will produce about 9.9 million kilowatt-hours annually once completed. The first phase of the project has been built, and includes 9,504 solar panels on 40 acres.[45]

National Solar plans to build a 200-megawatt facility in Hardee County, to be constructed in phases of 20 MW on about 200 acres each. [46]

Alternative Fuels

LS9, a California-based company, has acquired an existing production facility in Okeechobee as a test site for the development of biofuels. The first product to be produced at the Okeechobee facility will be the company's UltraClean diesel, which is produced as the result of a one-step fermentation process from cane sugar. Production is expected to begin the third quarter of 2012.[47]

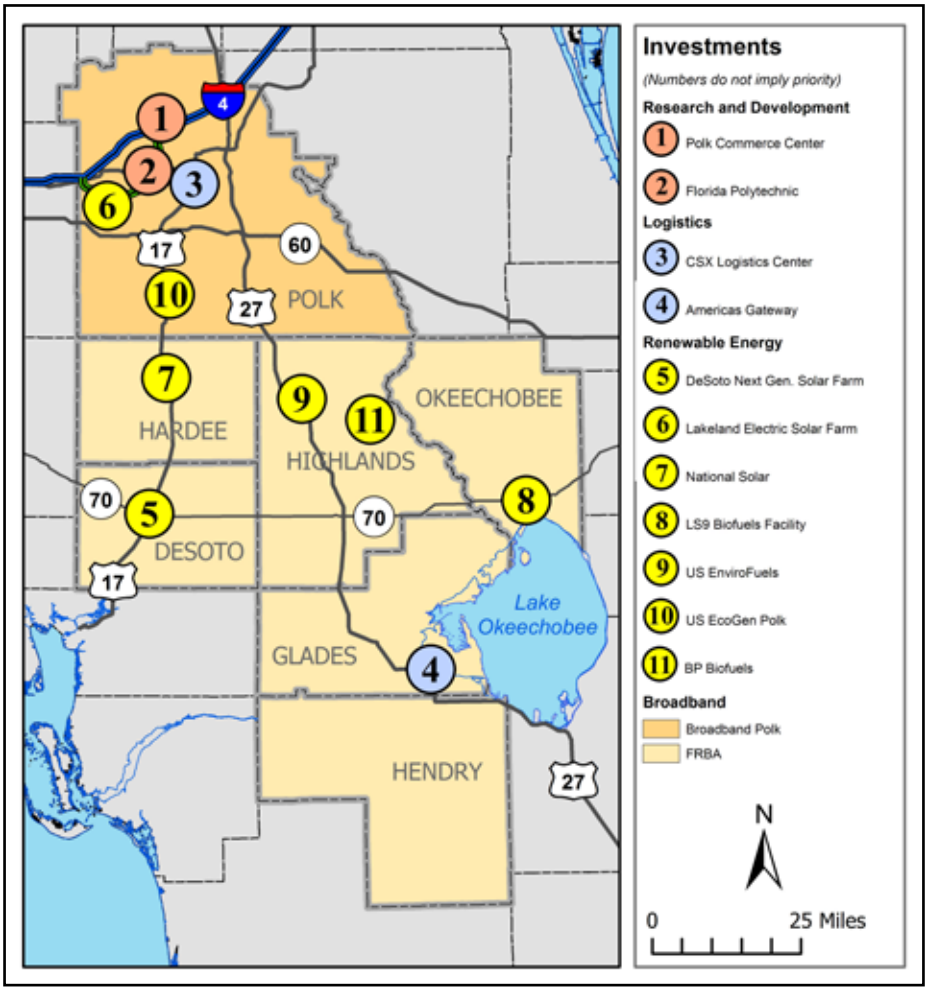
BP Biofuels, Highlands Ethanol LLC, a company owned by BP (British Petroleum), will open a biofuels plant near Lorida, in eastern Highlands County, in 2014. The plant is expected to be the first commercial scale cellulosic biofuel plant using dedicated energy grass to produce fuel. The energy grass farm will ultimately cover 20,000 acres; to date, 3,500 acres of former pasture land has been prepared, with 2,000 acres planted. The plant will have the capacity to produce 36 million gallons of biofuels each year and will bring 200 new jobs to the community during operation, plus an additional 600-800 jobs during construction.[48]

[42] The Lakeland Ledger (April 26, 2012). "Open House on CSX Project Will Have Job, Business Information." (retrieved July 11, 2012).
[43] Glades County Economic Development Council, "Global Logistics." (retrieved July 11, 2012).
[44] Florida Power and Light, "DeSoto Next Generation Solar Energy Center" (retrieved July 11, 2012).
[45] Lakeland Electric "Solar Farm: Fact Sheet" (retrieved July 11, 2012).
[46] National Solar "National Solar Power Reaches Key Milestone in Florida Solar Farm Projects" (retrieved July 11, 2012).
[47] LS9. "Fuel and chemical development plant to open in Okeechobee soon" (retrieved July 11, 2012).
[48] British Petroleum, "BP Biofuels Highlands" (retrieved September 20, 2012)

United States EnviroFuels, LLC is currently in the process of developing a sugar-based ethanol plant in Highlands County, using sweet sorghum as the primary feedstock. The plant will produce 20 million gallons of low-carbon ethanol per year, and will be designed for a future expansion to 40 million gallons per year. Simultaneously, the facility will produce approximately 9 megawatts of renewable power annually for export to the local electric grid and 45,000 tons of beverage-grade liquid carbon dioxide for the local beverage industry. In addition, the plant will produce a high-potassium fertilizer and be a net producer of water. It is estimated that roughly 25,000 acres of feedstock production will come from local growers.[49]

U.S. EcoGen Polk, LLC is planning to construct a 60-megawatt biomass plant in the City of Fort Meade, which will use eucalyptus trees as fuel. The trees, grown and regrown on a 2- to 4-year rotation, will be combusted at a rate of 400,000 to 500,000 tons per year, producing electricity at a capacity of 60 megawatts. The project is estimated to create 350 construction jobs, 35 permanent jobs in the operating plant, and 85 jobs associated with growing eucalyptus. The power plant will use a dry cooling system and consume 50,000 gallons of water per day, compared to the 1.5 million gallons processed by other facilities.[50]

Figure 62. Regional Economic Development Investments



[49] US Envirofuels "Projects." (retrieved July 11, 2012).
[50] Biomass Magazine (Sept. 26, 2011). "U.S. EcoGen plans 60 MW Florida biomass power plant." (retrieved July 11, 2012).

Broadband

Broadband Polk

Broadband Polk is a collaborative effort involving Polk County citizens, business leaders, civic organizations, non-profits, educational institutions, economic development professionals, high tech experts, and key representatives from various segments of the local economy. Facilitated cooperatively by Polk Vision and the Central Florida Regional Planning Council, the Broadband Polk Advisory Committee is working to raise awareness of the importance of robust broadband infrastructure in the 21st century economy and to develop a comprehensive broadband plan to address the current and future broadband needs for Polk County.

Florida Rural Broadband Alliance

The Florida Rural Broadband Alliance, LLC (FRBA) is a regional collaboration of local governments, community activists and economic development agencies from rural and economically disadvantaged communities located throughout the South Central Rural Area of Critical Economic Concern (SCRACEC) which includes Desoto, Hardee, Highlands, and Okeechobee Counties. The FRBA project will build a new Middle Mile broadband infrastructure, which will link together providers of vital public sector commercial services with private non-profit entities. FRBA's project will deliver up to 1,000 times the existing capacity within the coverage area. Doing so will create jobs, enhance public safety, improve delivery of healthcare services, enhance emergency services, and promote educational opportunities.

PERFORMANCE MEASURES

The Central Florida Regional Planning Council will submit an annual CEDS update that reviews the success of identified key projects in the region. In addition to the monitoring and evaluation of the activities referenced in the Plan of Action, the following indicators can be used to measure the effectiveness of the project and the strategy.

Most of the projects and programs identified in this CEDS are identified for the purpose of their potential for creating jobs and diversifying the economy. Through the Comprehensive Economic Development Strategy Committee, the Regional Planning Council will gather information on the performance measures. The information will be included in the CEDS update and will demonstrate the progress being made to encourage the region's economic diversification and the creation of permanent higher wage jobs.

Number of Jobs Created after Implementation of the CEDS

- Total Employment in Initial Year
- Total Employment in Subsequent Years

Number and Types of Public Sector Investments Undertaken in the Region

- EDA Sponsored Investments
- Significant State and Local Investments

Number of Jobs Retained in the Region

- Number of Jobs Retained as a Result of Federal Investments
- Number of Jobs Retained as a Result of Select State and Local Investments

Amount of Private Sector Investment in the Region after Implementation of the CEDS

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

Six Pillars Measures

1. Talent Supply & Education
   a. Average Annual Wage
   b. High School Graduation Rates
   c. 8th Grade Math Performance

2. Innovation & Economic Development
   a. Gross Domestic Product
   b. Bed Tax Collections
   c. Trade Exports and Imports

3. Infrastructure & Growth Leadership
   a. Population Counts, Estimates, and Projections
   b. Building Permits
   c. Vehicle Miles Traveled per Lane Mile

4. Business Climate & Competitiveness
   a. Average Annual Unemployment Rates
   b. Employment by Industry
   c. Wages by Industry

5. Civic and Governance Systems
   a. Millage Rates
   b. Registered Nonprofit Organizations
   c. Voter Participation

6. Quality of Life & Quality Places
   a. Per Capita Income
   b. House Purchase Price and Cost Index
   c. Persons Living in Poverty

Community and Private Sector Participation

With its designation as an Economic Development District, the Central Florida Regional Planning Council works closely with its partners to further the economic growth and diversity of the region.

With our Heartland 2060 Vision effort, we have charted a course for regional collaboration on all levels, positioning the region for long term economic health and opportunity. Collaboration and public-private partnerships are vital for the long term future economic success of the Heartland region. Throughout the visioning process, we have had participation from more than 100 groups and agencies, both public and private, acting as stakeholders in the process of moving our region forward to a strong future economy.

The Education, Workforce, & Economic Development Task Force has been addressing key issues since 2008. This task force is comprised of private sector leaders in the region as well as community partners and the public sector.

The Education, Workforce, & Economic Development Task Force addressed the following key issues:

Economic Diversification

Topics:

1. Business retention and attraction
2. Opportunities for youth
3. Meeting future industry skills needs
4. Mix of employment opportunities

Infrastructure to Support Diversified Economy

Topics:

1. Utilities (Including Broadband)
2. Transportation
3. Energy Infrastructure
4. Business Climate

Early Learning, K-16, Lifelong Education

Topics:

1. Opportunities for Children of the Heartland to Learn and Work Locally
2. Improve Graduation and Achievement Rates
3. Expand Access to Adult Education, Alternative Learning, and Lifelong Improvement
4. Creating a 2060 Workforce

The work of the Education, Workforce, & Economic Development Task Force has been taken forward in the strategies aligned with the Six Pillars.

The Heartland 2060 Consortium was formed in order to further the completion of the Heartland 2060 Vision. The Consortium partners include the Heartland 2060 Counties (Desoto, Hardee, Highlands, Okeechobee, Glades, and Hendry) as well as Florida's Heartland Regional Economic Development Initiative (FHREDI), Heartland Workforce, Sebring Airport Authority, Shimberg Center for Housing Studies at the University of Florida, and Archbold Biological Station. Funding from the Sustainable Communities Regional Planning Grant Program will enable the completion of the Heartland 2060 visioning effort by enabling the Heartland 2060 Consortium to create and implement a Regional Plan for growth and development.

The Plan will incorporate multiple elements including Scenario Modeling of future growth alternatives to explain these alternatives to elected officials and the public and assist with decision making. Public Involvement will be conducted throughout each county, to encourage broad participation from all citizens. Energy Baseline Inventory and Analysis of the region's current energy footprint will be prepared to advance the regional goal to become a leader in alternative energy production and sustainable jobs for the future. The Rural Housing Initiatives will include a GIS-based inventory of available affordable housing lots in all six rural counties and an Affordable Housing Model methodology for rural areas. An Economic Strategic Plan for Alternate Fuels will create additional productive options for use of agricultural lands which would provide workforce opportunities while reducing dependence on fossil fuels. The Economic Development Strategy will help the region move toward economic diversification and responsible development. A Five-Year Strategic Action Plan, which includes CEDS strategies, will be developed with specific action steps to be accomplished and will provide for updates throughout the duration of the vision, which will be 50 years. Benchmark measurements will be developed in order to measure progress over the duration of the implementation of the Heartland 2060 Regional Plan.

Additionally, the Central Florida Economic Development District participates in economic development initiatives locally, regionally, and on a Statewide level. The current CEDS document adopts the framework of the Florida Chamber Foundation's Six Pillars of Florida's Future Economy. The Central Florida Economic Development District Executive Director has served on the Florida Chamber Foundation Caucus (both the Infrastructure and Growth Management, and the Civic and Governance Pillars). In furtherance of coordinating with public and private partnerships at all levels, the CFRPC hosted the Department of Economic Opportunity (DEO) State Strategic Plan Workshop.

As such, the working partnerships of the CFRPC include the Economic Development Organizations and Councils of each County of the region, the region's educational institutions, Florida's Heartland Regional Economic Development Initiative (FHREDI), Heartland Workforce, and other applicable entities and organizations. These partnerships have enabled the establishment of an ongoing effort and network to engage public and private agencies in the economic development of the region.

The CEDS Committee is composed of a cross representation of the region. The makeup of the Committee includes public and private sector individuals, representing Economic Development Organizations, Educational Institutions, and community leaders, as well as representation from the private sector. The Committee provides comments on the Strategy as well as agrees upon the Goals of the Strategy, the targeted clusters for the region, and the Key Projects of the Region, and shares information on programs and projects affecting the region.

APPENDICES

Appendix 1. Prior Industry Cluster Analyses

Two prior industry cluster analyses covering counties in the region have been conducted by SRI International, a private firm:

1. Central Florida Cluster Study: Industry Cluster Assessment & Selection – Industry Cluster Analysis of Polk County (includes Hardee and Highlands Counties) (2008); and
2. Hardee, Highlands and DeSoto Tri-County Industry Cluster Analysis (2010).

The analysis of Polk County also included industry cluster profiles of Hardee, Highlands, Hillsborough, and Orange Counties. Okeechobee County has not yet been the subject of any industry cluster analysis.

The following key industry clusters were identified for Polk County:

- Life Sciences & Medical Services
- Business Services
- Financial Services
- Logistics & Supply Chain Management
- Construction & Real Estate
- Research & Engineering and Other High-Tech Industries
- Agriculture & Agribusiness

The following key industry clusters are the top employers in DeSoto, Hardee, and Highlands Counties:

- Education & Government
- Retail Trade
- Medical Services
- Agriculture & Agribusiness
- Dining & Tourism
- Construction & Real Estate
- Business Services
- General Services
- Financial Services
- Wholesale Trade

Employment data for the cluster studies were obtained by SRI International from the Quarterly Census of Employment and Wages. To protect the confidentiality of individual firms, the Bureau of Labor Statistics suppresses employment numbers in a large number of industries at the county level. Therefore, it was not possible to replicate the exact methodology used in the study by SRI.

In addition, the following key industry clusters for the State of Florida have been identified by Enterprise Florida:

- Cleantech (Clean Technologies)
- Life Sciences
- Information Technology
- Aviation / Aerospace
- Logistics and Distribution
- Defense & Homeland Security
- Financial / Professional Services

Appendix 2. County Finances

Table 53 shows revenue totals by governmental function for each county in the region, for the local fiscal year ending Sept. 30, 2010 (the most recent year for which data were available).

Table 53. Revenue Totals by Government Function, 2010

Account	DeSoto	Hardee	Highlands	Okeechobee	Polk
Taxes	$16,122,921	$16,242,855	$52,383,527	$25,951,813	$314,320,574
Permits, Fees, and Special Assessments	$4,387,119	$3,037,257	$7,172,281	$3,042,093	$39,732,533
Intergovernmental Revenue	$10,319,899	$10,451,966	$28,879,774	$12,269,173	$109,975,038
Charges for Services	$11,084,284	$3,407,491	$14,090,104	$4,162,156	$180,790,874
Judgments, Fines, and Forfeits	$126,064	$1,172,940	$271,255	$218,811	$3,609,826
Miscellaneous Revenues	$821,149	$855,577	$7,166,768	$5,171,193	$33,507,218
Other Sources	$16,427,911	$3,186,337	$3,258,247	$24,374,830	$68,762,046
Total	**$59,289,347**	**$38,354,423**	**$113,221,956**	**$75,190,069**	**$750,698,109**

Source: Florida Office of Economic & Demographic Research

Table 54 shows expenditure totals by governmental function for each county in the region, for the local fiscal year ending Sept. 30, 2010 (the most recent year for which data were available).

Table 54. Expenditure Totals by Government Function, 2010

Account	DeSoto	Hardee	Highlands	Okeechobee	Polk
General Government Services (Not Court-Related)	$9,995,462	$6,753,373	$18,556,854	$12,486,108	$149,189,281
Public Safety	$14,650,682	$12,232,647	$41,193,151	$21,946,396	$257,681,927
Physical Environment	$8,921,107	$4,613,190	$19,198,893	$2,613,776	$100,778,537
Transportation	$5,421,063	$6,105,143	$18,493,866	$2,992,290	$116,818,669
Economic Environment	$1,502,906	$1,240,949	$3,852,919	$1,838,092	$28,692,981
Human Services	$1,346,753	$859,385	$2,929,756	$2,019,274	$56,423,941
Culture / Recreation	$1,559,456	$961,549	$3,456,579	$2,433,636	$16,759,747
Other Uses and Non-Operating	$16,383,854	$3,292,454	$3,259,362	$24,686,064	$41,163,117
Court-Related Expenditures	$1,197,185	$1,650,291	$4,288,648	$2,390,692	$32,274,082
Total	**$60,978,468**	**$37,708,981**	**$115,230,028**	**$73,406,328**	**$799,782,282**

Source: Florida Office of Economic & Demographic Research

Table 55 shows the county-wide millage rates for each county in the region.

Table 55. Municipal Ad Valorem Tax Profiles

County	DeSoto	Hardee	Highlands	Okeechobee	Polk
County Government Operating	6.8987	8.554	7.1	8.547	6.8065
County Government Debt Service	0	0	0	0.3255	0.06
County Government Dependent Special District	0	0	0	0	0
School Board Operating	7.477	7.604	7.813	7.926	7.67
School Board Debt Service	0	0	0	0	0
Independent Special Districts	0.3928	0.7574	0	0.306	0

Source: Florida Office of Economic & Demographic Research