



Heartland 2060

Building a Resilient Region



Origins

Who We Are

Heartland 2060's seven inland counties share a rich cultural heritage and unique natural resources that provide dynamic opportunities and challenges in the coming decades. The journey to share in building a resilient Heartland region whose future is determined by its residents began in 2008 as a grassroots effort. A diverse group of volunteers from business, education, agriculture, government, non-profits, civic organizations, and environmentalists joined forces to engage the communities of the Florida Heartland in discussions about the future.

The questions were simple: Who are we and what are our core values? What are our region's strengths and weaknesses? How can we build a future that provides opportunities for all of its residents? How can we build a resilient Heartland region for this generation and many generations to come?

The communities of the Florida Heartland counties of DeSoto, Glades, Hardee, Hendry, Highlands, Okeechobee, and Polk, rich in a tradition tied to the land, are developing a future that:

- ensures a vibrant, resilient economy
- enables growth while ensuring natural areas and wildlife are protected
- maintains agricultural productivity
- supports healthy communities
- provides a future for our children to live, learn, play and work in the Heartland.

In the Heartland... there are almost **900,000** people residing on **4.8** million acres.

The Florida Heartland is seven inland counties sharing a similar geography and economy.



Where We Are

Covering over 4.7 million acres, the Florida Heartland stretches across many important natural areas. From the Green Swamp to the Southern Everglades, and from the Peace River basin to Lake Okeechobee, the region contains diverse natural resources. The Heartland is a land of natural beauty.

In the Heartland... currently over **80%** of land is designated in either agriculture or conservation land use.

Current Conditions



Education, Workforce, & Economic Development

The total population of the region was 855,494 at the 2010 Census, representing a 20% increase since 2000. Like much of Florida, the Heartland region has experienced population growth in the last few decades.

Between 1980 and 2010, the region's population grew by 89%. During the same timeframe, Florida's population grew by 93%, while total United States population grew by only 36%.

In the Heartland... median household income is **20%** lower than the nation.

The two largest cities, Lakeland (population 97,422 in 2010) and Winter Haven (population 33,874 in 2010) are both in urbanized areas exceeding 200,000. The 2010 Census marked the designation of the Sebring-Avon Park Urbanized Area. Polk County is the most populous (population 602,095), followed by Highlands County (population 98,786). The five other counties are largely rural with Glades County (population 12,884) being the least populous.

Regional Population

County	2010 (Census)	2060 (projected)
DeSoto	34,862	53,005
Glades	12,884	23,849
Hardee	27,731	35,494
Hendry	39,140	54,026
Highlands	98,786	163,052
Okeechobee	39,996	61,798
Polk	602,095	1,338,347
Heartland (total)	855,494	1,729,571

Heartland: A Region of Opportunity

Compared to the rest of Florida, the Heartland has higher unemployment, higher rates of poverty, lower wages, and lower educational attainment.

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 agriculture and mining are still major employers in the region, the greatest number of jobs are now in service-providing industries such as retail trade, education, and health care. The Heartland has many regionally-important employment centers focusing on agriculture, logistics, health care, and small business.

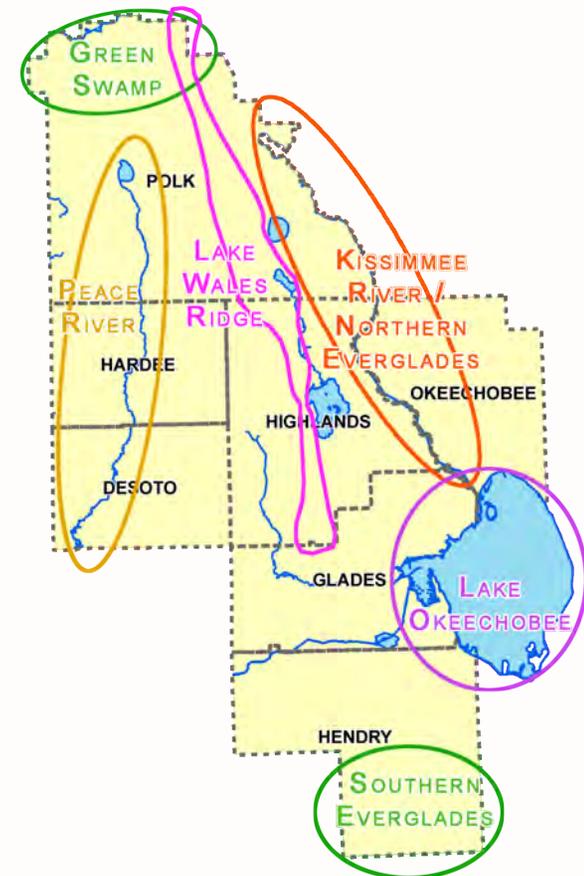
In the Heartland... there are 18 major employment centers of regional significance.

Environment & Natural Resources

The Heartland region is the point of origin for significant natural resource systems influencing much of peninsular Florida. The Green Swamp is the potentiometric high for the principal groundwater resource of the peninsula, the Floridan Aquifer, which supplies drinking water to nearly 10 million people. The Green Swamp provides headwater features for four 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. The Kissimmee River is the principal freshwater source for Lake Okeechobee and the Everglades. The Lake Wales Ridge contains the remnants of a globally unique endangered habitat. The region plays a pivotal role in the health of ecosystems throughout much of peninsular Florida. Lakes are located throughout the region providing recreational opportunities as well as an important habitat for fish and wildlife.

In the Heartland... there are 6 significant and distinct ecological landscapes.

Heartland Natural Regions





Transportation & Land Use

The Heartland region has three urbanized areas (Lakeland, Winter Haven, and Avon Park/Sebring) which comprise 61% of the region's population. The remainder of the region is primarily rural and agricultural, specializing in citrus, cattle ranching, and phosphate mining by percentage of total area. The region has three major north-south highways (US 27, US 17, and US 98), and five major east-west highways (Interstate 4, US 92, State Roads 60, 70 and 80). Several freight rail lines run through the region, connecting to the Miami, Tampa Bay, Orlando, Port Charlotte and Jacksonville areas. People and freight in the Heartland are transported by road, rail, air, and public transportation.

Heartland transportation infrastructure includes:

- **12 General aviation airports**
- **4 Amtrak stations**
- **1,628 miles of state & US highways**
- **490 miles of railroad track**
- **Connecting 5 major population centers**



Community Resources

The residents of the Heartland value their way of life and cultural identity. Communities in the region are a reflection of diversity and tradition, as well as a desire to adapt to an ever changing landscape. Quality of life is crucial to the citizens of the region, in terms of healthy communities, cultural assets, and the opportunity to live, work, and play in their cities and towns.

The median value of owner-occupied housing in the Heartland is only 63% of the state median, meaning most housing is affordable. In the Heartland, nearly 1/3 of children live in poverty and approximately 16% of residents live below the poverty line.

In the Heartland we have:

- **23 Libraries**
- **37 Botanical & Zoological Societies**
- **8 Performing Arts Centers / Theaters**
- **12 Historical & Cultural Activity Centers**
- **17 Museums / Galleries**

Our Values

What We Treasure

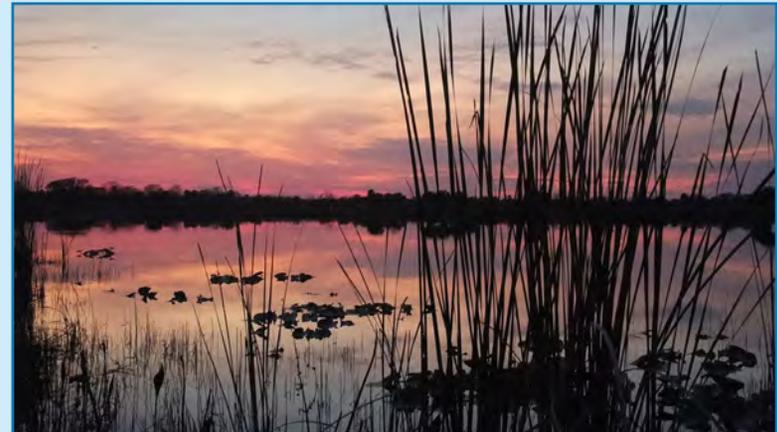
The Core Values of the Vision, which were established by the Heartland 2060 Leadership Team, address the key concerns of the region as follows: Stewardship of Natural Resources, Our Water Resources, Respect for Agriculture, Our Communities, and Future for Our Children. The following Task Forces worked on identifying Key Issues and Goal Setting: Environment and Natural Resources; Education, Workforce and Economic Development; Community Resources; and Transportation and Land Use.



The Heartland has over 1.1 million acres of conserved lands.

Stewardship of Natural Resources

Natural resources form the foundation of the Heartland's way of life.



The Heartland has 318,183 acres of lakes.

Our Water Resources

Water for people, business, and nature in the Heartland.

Respect for Agriculture

Agriculture is a foundation of the past, present and future of the Heartland.



The Heartland has over 2.9 million acres of land designated for agricultural uses.



The Heartland has 28 cities and 39 Census-recognized communities spread across 7 counties.

Our Communities

Preserving and improving our quality of life for all Heartland residents.



The Heartland has 225,000 children; over 25% of our population.

Future for Our Children

Ensuring our children’s future to live, learn, work and play in the Heartland.



What's Happening

Growing Global Markets & Shifting Global Trade Routes

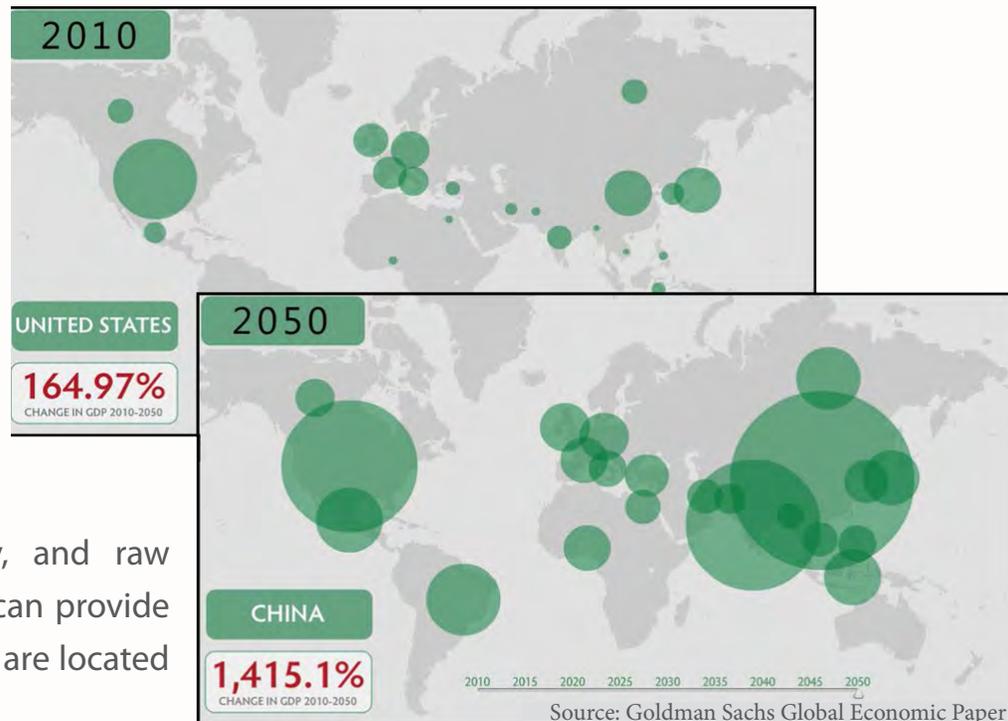
As the Heartland region looks to its future, several trends are reshaping the world around it and creating unique opportunities for this part of Florida. The global economy will become larger and more integrated over the next 50 years, creating opportunities for regions that are strategically connected to global markets and trade lanes.

Estimates are that the world's population will increase from about 6.9 billion in 2010 to 9.6 billion by 2050. The strongest growth will occur in Asia, Africa, and Latin America. Various studies have estimated that as many as one billion new consumers will enter the middle class by 2020, with two thirds living in these emerging markets.

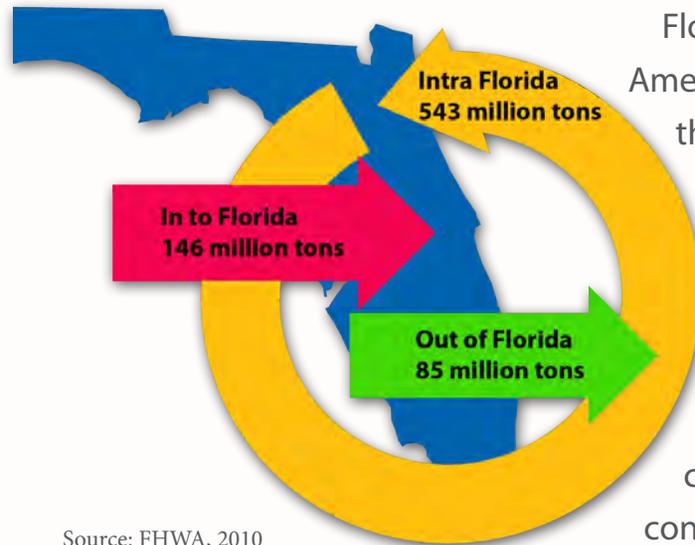
The global economy is expected to double in size over the next 20 years, with China becoming the world's largest economy measured by gross domestic product. By 2030, 80% of the world's purchasing power, 90% of economic growth, and 95% of consumers will live outside of U.S. borders, according to the U.S. Chamber of Commerce.

Global trade in goods will total \$35 trillion and trade in services will reach \$6 trillion by 2020. Global demand for housing, infrastructure, and consumer goods will spur trade in electronics, machinery, manufactured goods, food, energy, and raw materials creating opportunities for regions that can provide these resources and goods, as well as regions that are located on critical trade lanes.

Projected Growth in World Markets



Florida Freight Flows

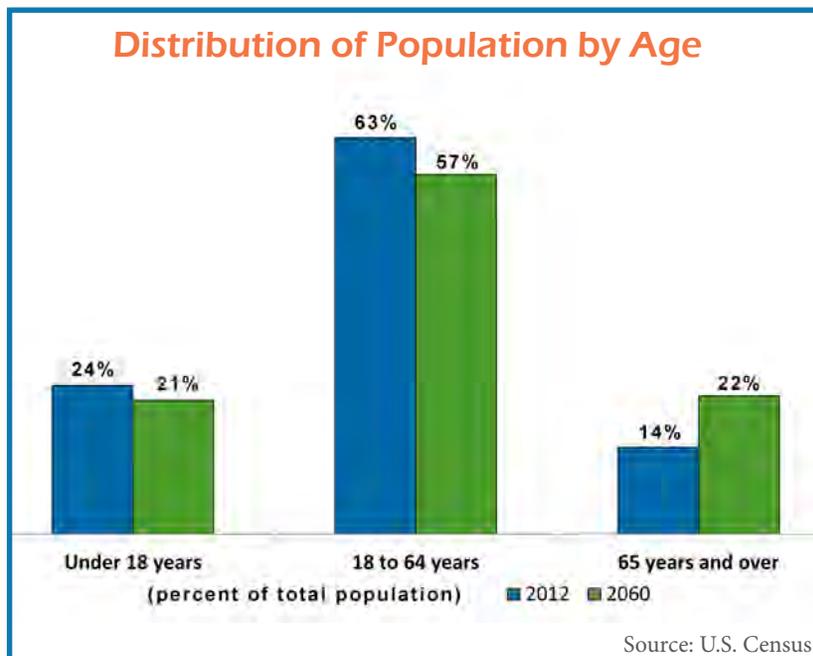


Source: FHWA, 2010

Florida is strategically positioned for these changing global trade patterns. Florida currently is the leading U.S. state for north/south trade with Latin America and the Caribbean, accounting for more than 20% of all U.S. trade with these nations. The expansion of the Panama Canal is expected to expand east-west trade between Asia and the U.S. East Coast, with Florida the closest state to the canal. Florida also is the closest state to Africa, which may become a more important trading partner route in the future.

As the only region in Florida with no coast or seaport, the Heartland region has a large number of truck and rail terminals and distribution centers that can function as “inland ports.” US 27 and I-4 provide important connections to seaports in surrounding regions, with US 27 becoming a major trade corridor connecting Florida to the rest of the nation.

Distribution of Population by Age



A Growing & Changing U.S. Population

The United States will continue to experience strong population and economic growth compared to other major industrialized nations. The U.S. population will grow from 312 million in 2010 to 420 million by 2060, according to U.S. Census estimates.

Projections for the next few decades suggest that more than half of that growth will occur in the arc of southern states from Texas to Virginia. Florida is expected to surpass New York as the nation's third largest state in 2014, and its population is expected to increase 35% between 2010 and 2040. This places

the Heartland region in a strategic location in the middle of one of the nation's fastest-growing states.

The U.S. population is becoming older and more diverse as it grows. The Census Bureau projects that the population age 65 and older will more than double between 2012 and 2060, reaching 92 million residents, or more than one in five nationwide. Florida is expected to remain a major draw for retirees, with the Heartland providing a wide range of options from medium sized cities to rural areas. The older population will fuel growth in spending on health care, personal services, and leisure activities.

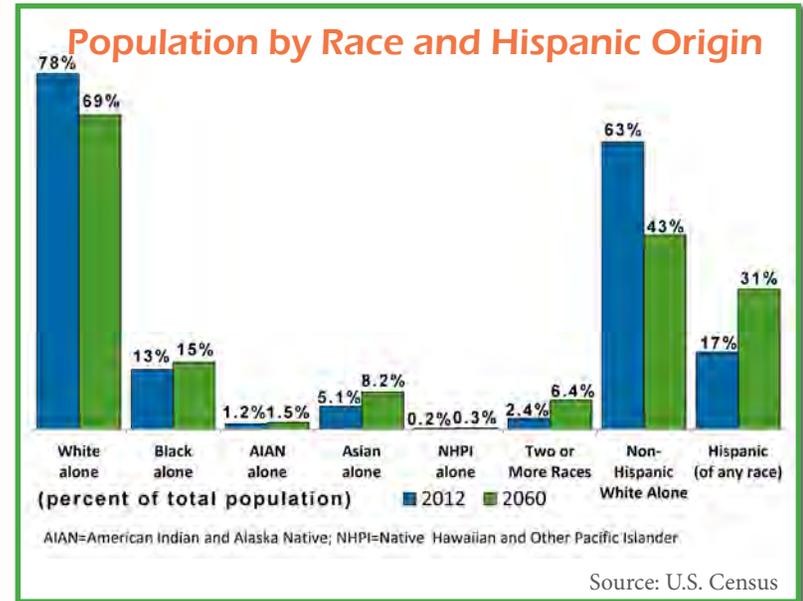
The working-age population (18-64) will increase more than 21% by 2060, but its share of the total population will decline. This may increase concerns about the availability of skilled labor, as well as the sustainability of public services as there are fewer workers supporting each retiree. Florida is ahead of the United States on these demographic trends, as are many of the Heartland counties.

The U.S. population also will become more diverse. The Census Bureau projects that the non-Hispanic white population will peak in 2024 and then slowly decrease through 2060. At the same time, the Hispanic population would more than double, accounting for nearly one in every three residents by 2060. The Asian population also will double during that period.

This diversity will have tremendous implications on consumer spending, workforce skills, and needs for public services. Florida and parts of the Heartland are ahead of the curve here as well.

Changing U.S. Economy

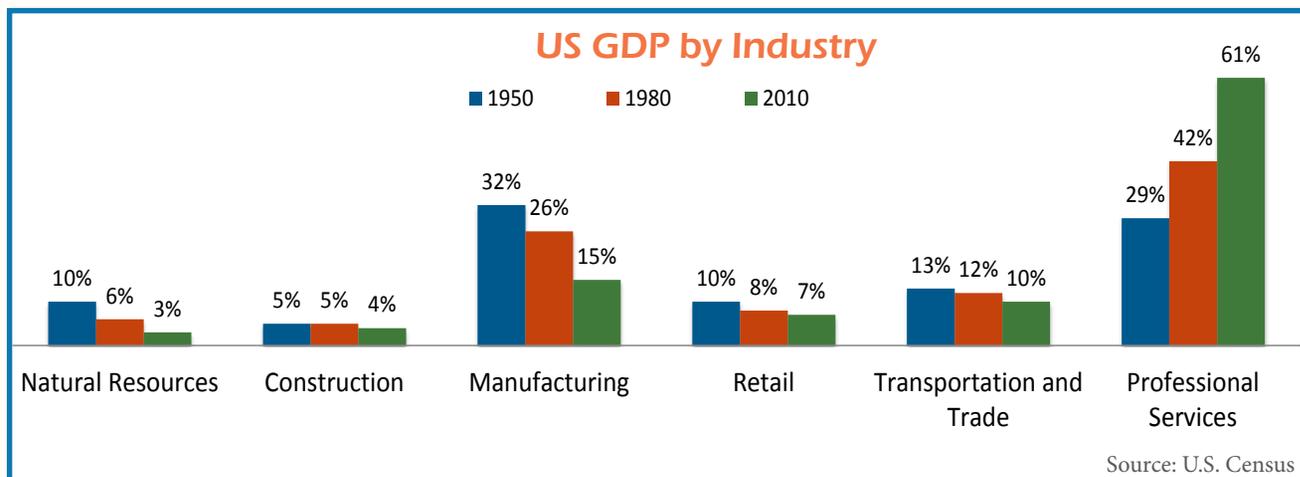
The U.S. economy is continuing a decades long shift from a focus on manufacturing to services and information.



Business, professional, health, educational, and related services industries increased their share of U.S. gross domestic product from 29% in 1950 to 42% in 1980 and 61% in 2010, according to the U.S. Bureau of Economic Analysis. Manufacturing's share of U.S. GDP dropped by more than half during the same period, from 32% to 15%.

The U.S. economy is moving into yet another era, characterized by knowledge and innovation. Future growth and competitiveness are likely to be driven by clusters of related industries where innovation places regions at a competitive advantage. Some of the implications of this shift include:

- Strong growth in business, professional, and technical services, as well as arts, design, and other creative industries.
- A potential resurgence in U.S. manufacturing, particularly in technology-oriented industries, due to a reduction in labor cost differences between the United States and newly industrialized nations such as China; efforts to rationalize logistics patterns and near-source supply chains back to the Western Hemisphere; and the still strong (although narrowing) global advantage the United States enjoys in research, development, and technology transfer. U.S. manufacturers are among the leanest in the world, however, and in many industries will be able to boost production without significant increases in employment.
- A proliferation of new technologies that will reshape almost every industry, from manufacturing to logistics to energy to agriculture.



- Growing demand for both college graduates and “middle skill” technical workers with industry specific certifications, both of which may be in shorter supply as the baby boom retires and labor force growth slows.

Agriculture, mining, energy, and other resource-based

industries account for a relatively small number of jobs nationwide, but may become more important in terms of production as increasing global demand boosts exports and commodity prices. Many of these industries are poised for major technological breakthroughs that could generate new products or markets.

These shifts in the U.S. economy create opportunities for the Heartland due to its legacy in agriculture and mining and its access to global markets. Modern communications technologies as well as new production techniques such as 3D printing create the opportunity for skilled service professionals and specialized manufacturing companies to locate anywhere in the world—enabling smaller cities and rural areas to succeed in highly specialized market niches. But the quality of a region’s workforce increasingly will become the single most important determinant of its economic success.

Increasing Importance of Environmental Stewardship

As the U.S. population and economy grow, caring for the built and natural environment will be an increasing emphasis of public policy and corporate and individual action. This reflects the impacts of continued growth on

the land use, water availability and quality, air quality, noise, and other areas. The stewardship emphasis also reflects growing recognition of the economic value of natural, historic, and cultural resources. Finally, the recent string of extreme weather events and concerns about long range climate trends further underscore the need for careful planning for long-term growth.

Many cities and counties are collaborating to better address these growth pressures and impacts at a regional scale. With its core values including an emphasis on natural resources, agriculture, and water, the Heartland region is well positioned to be a model for careful integration of future growth and development with natural and agricultural lands.

Increasing Importance of Economic Regions

Across the globe, economic competition increasingly occurs at a regional scale. These regions are defined not by political boundaries or natural systems, but rather by commuting patterns, supply chains, and other business-to-business relationships. Over time, these economic regions are growing in size and complexity – for example, Tampa Bay and East Central Florida are growing together

into a 15-county “superregion” from Tampa through Polk County to Orlando and the Space Coast. These larger, more complex regions do not fit the traditional circumferential pattern of a center city and suburbs. They instead tend to be linear in structure, linking individual cities and metropolitan areas along major transportation corridors.

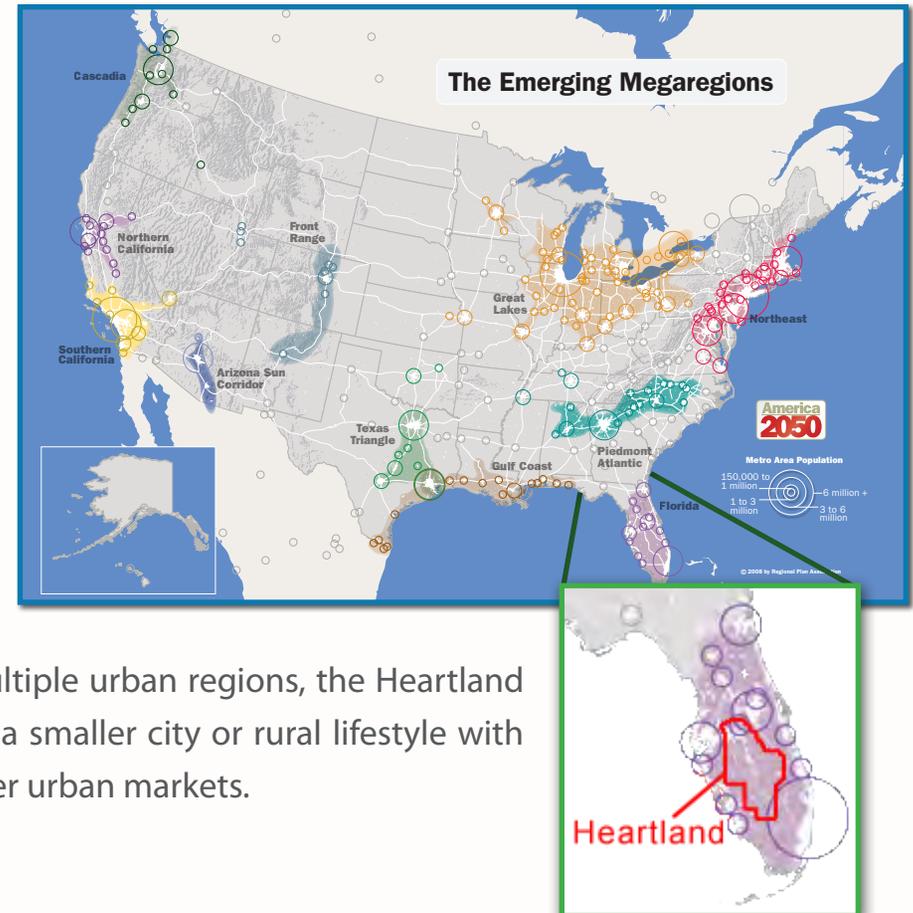
National studies suggest that over the next several decades, global and U.S. economic growth will focus on a small number of “megaregions,” or networks of multiple cities and counties sharing common industry` clusters, talent, and infrastructure. Most if not all of Florida’s existing metropolitan areas could become linked together into one

of these megaregions. As a rural area surrounded by multiple urban regions, the Heartland can become part of this broader megaregion, providing a smaller city or rural lifestyle with close access to jobs, businesses, and amenities in the larger urban markets.

Implications for the Heartland

The Heartland’s future looks bright because it is located in a fast-growing state and region and close to growing global trade lanes. With competitive costs and available land and labor, the Heartland offers businesses opportunities to expand production or supply chains. And it offers residents choices for a smaller city or rural lifestyle in close proximity to major urban areas.

However, the region faces significant competitive challenges, including the availability of skilled labor, the need for enhanced transportation and communications connectivity to markets, and the need to protect natural resources and valuable agricultural lands as future growth occurs. Only by working together as a region will the Heartland be able to position for future economic opportunities while also maintaining a high quality of life for its residents.



Beginning

Regional Assets

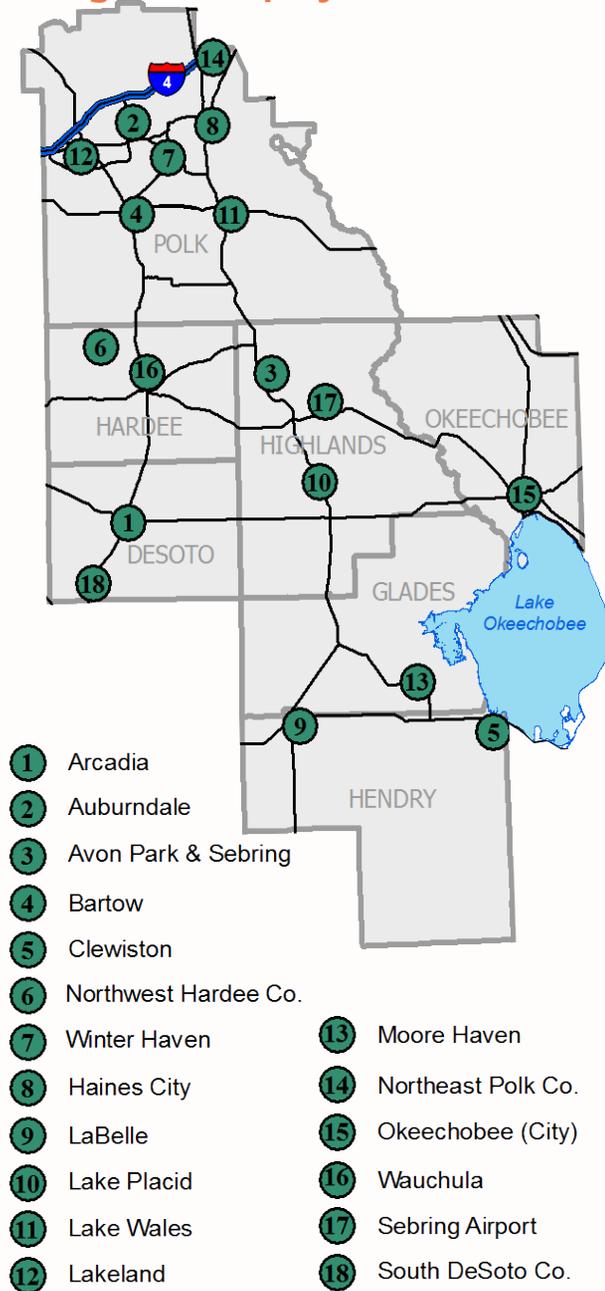
Current Economy

The future Current Economy includes eighteen historic regional employment centers that are anticipated to increase in employment as we move forward, as well as the emergence of two new employment centers that would come on board in an economy similar to the current industry concentrations. Due to existing and planned infrastructure and investments that are being made throughout the region, growth will likely occur in these areas as well as other smaller employment centers in the region. It is projected that more jobs will exist in these smaller markets even if they are not considered regional employment centers. The Current Economy anticipates continued major employment in agriculture, health care, ecotourism, and service industries, including retail.

Energy-Focused Economy

In the future Energy Economy, two existing projects and employment centers as well as the emergence of seven forecasted new employment centers are identified. These forecasts are based on existing and planned infrastructure, as well as soil suitability for alternative energy crops. These employment centers will focus on jobs in areas such as research and development, advanced manufacturing, professional, scientific, and technical services, educational services, utilities, and forestry and land management activities.

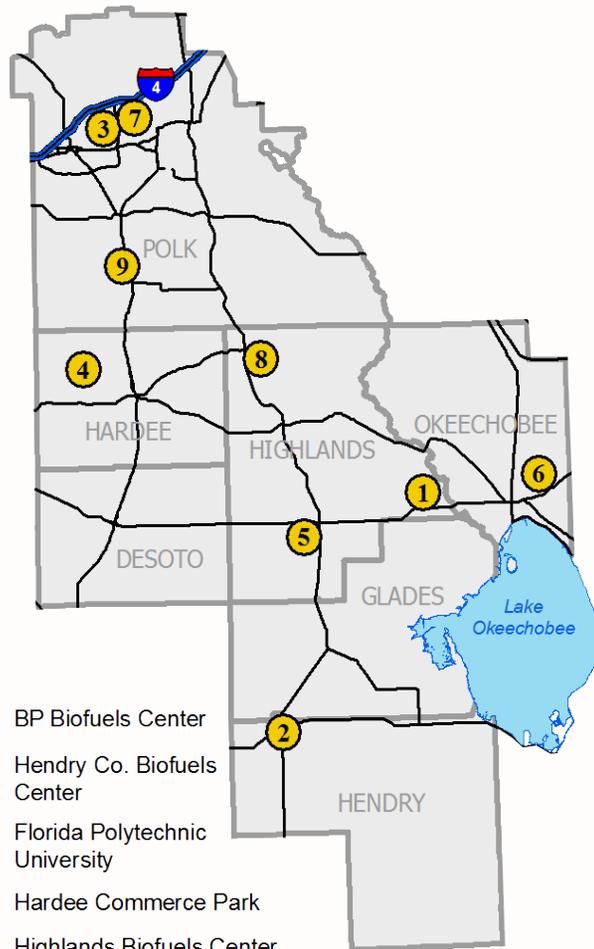
Present "Current" Economy
Regional Employment Centers



Trade-Focused Economy

In the future Trade Economy, five existing projects and employment centers as well as the emergence of four forecasted new employment centers are identified. The locations of these centers are predicted based upon existing projects

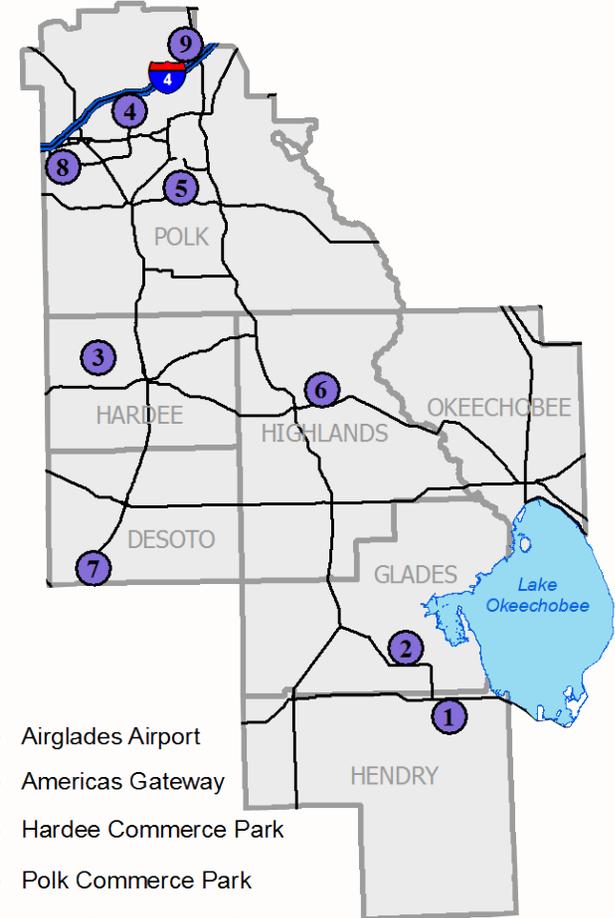
Energy-Focused Economy Employment Centers (2060)



- ① BP Biofuels Center
- ② Hendry Co. Biofuels Center
- ③ Florida Polytechnic University
- ④ Hardee Commerce Park
- ⑤ Highlands Biofuels Center
- ⑥ LS9 Biofuels Center
- ⑦ Polk Commerce Park
- ⑧ So. Florida State College
- ⑨ US EcoGen Biomass

as well as infrastructure, access to transportation and rail corridors and connectivity to key ports, as well as strategic geographic locations. These employment centers will primarily focus on jobs in areas such as transportation and warehousing, advanced manufacturing, wholesale trade, construction, educational services, management, and professional, scientific, and technical services.

Trade-Focused Economy Employment Centers (2060)



- ① Airglades Airport
- ② Americas Gateway
- ③ Hardee Commerce Park
- ④ Polk Commerce Park
- ⑤ Polk Gateway (ILC)
- ⑥ Sebring Airport
- ⑦ South DeSoto Distribution Center
- ⑧ West Lakeland Distribution Center
- ⑨ Northeast Polk



Current Path

Our Current Direction

Generally, agricultural and retirement segments across the region affect the economic indicators. The agricultural communities have higher unemployment rates, higher poverty rates, low median household income and lower median home values. The region as a whole performs lower in most indicators when compared to the state of Florida and the United States. Generally, this is an economically depressed region of Florida.

1 in 5 Heartland residents lacks a High School diploma or equivalent.

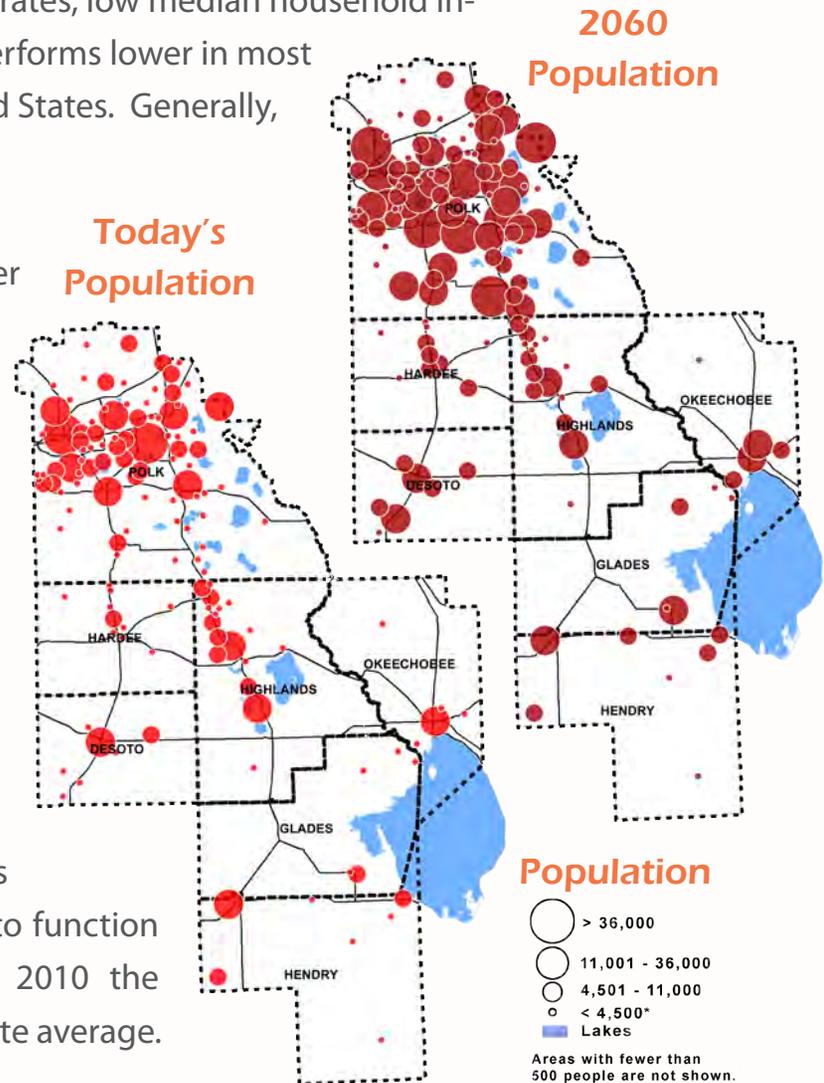
The region, at 8% in 2013z, displays a higher unemployment rate than Florida and the United States as a whole. Also due primarily to retirement, the region has a higher percentage of persons not in the labor force when compared to the state and Nation.



Education, Workforce, & Economic Development

Trends

The need for lifelong training and education is continuous as the technology market constantly changes and skills are vital to function in the economy. According to the U.S. Census Bureau, in 2010 the Heartland residents had 55% fewer college degrees than the state average.



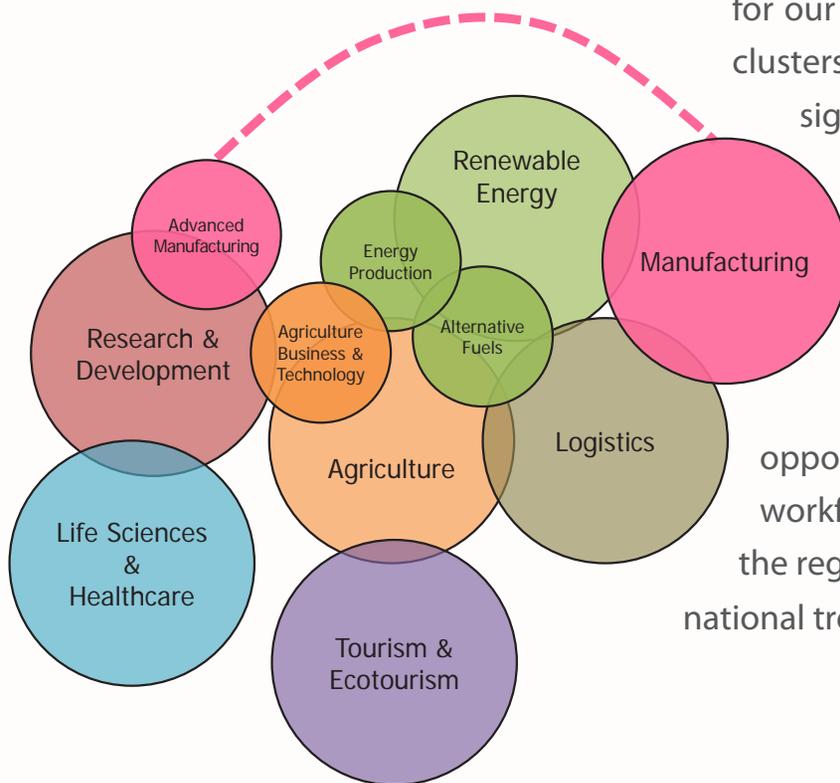
Employment in the year 2060 is projected to be focused primarily around existing employment centers. The Heartland population is projected to increase by over 50% to 1.73 million persons by 2060.

The Heartland has 9 existing and future regional employment centers that can facilitate an Energy Economy.

Opportunities

Florida's High Tech Corridor Initiative (<http://www.floridahightech.com>), which includes the Heartland, is an opportunity for local businesses and entrepreneurs to tap into world class university research expertise in developing new technologies and processes.

Future Industry Clusters in the Heartland



The target clusters for the region are identified below, illustrating the opportunity to diversify the workforce and grow high value jobs for our residents. The figure shows the relationships between target clusters, with the overlapping circles indicating those clusters that are significantly interconnected.

The region's economy has shown an ability to reinvent itself, moving away from employment based on natural resources toward the service sector. 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. A more educated workforce presents new opportunities for the region, even if it continues to lag behind national trends.

The Heartland has 9 existing and future regional employment centers that can facilitate a Trade Economy.

Challenges

Employment in the region's traditional industries has declined, and unemployment in some sectors may continue to increase. The region's workforce may not have the skills necessary to adapt to the shift in key industries that is taking place. Employment will become increasingly difficult to obtain for workers with lower levels of education and training. The Heartland has 10% fewer persons in the workforce than the state average. The poverty cycle will continue if educational attainment does not improve.

Heartland children are 12% less proficient in math than the state.

Environment & Natural Resources

Trends

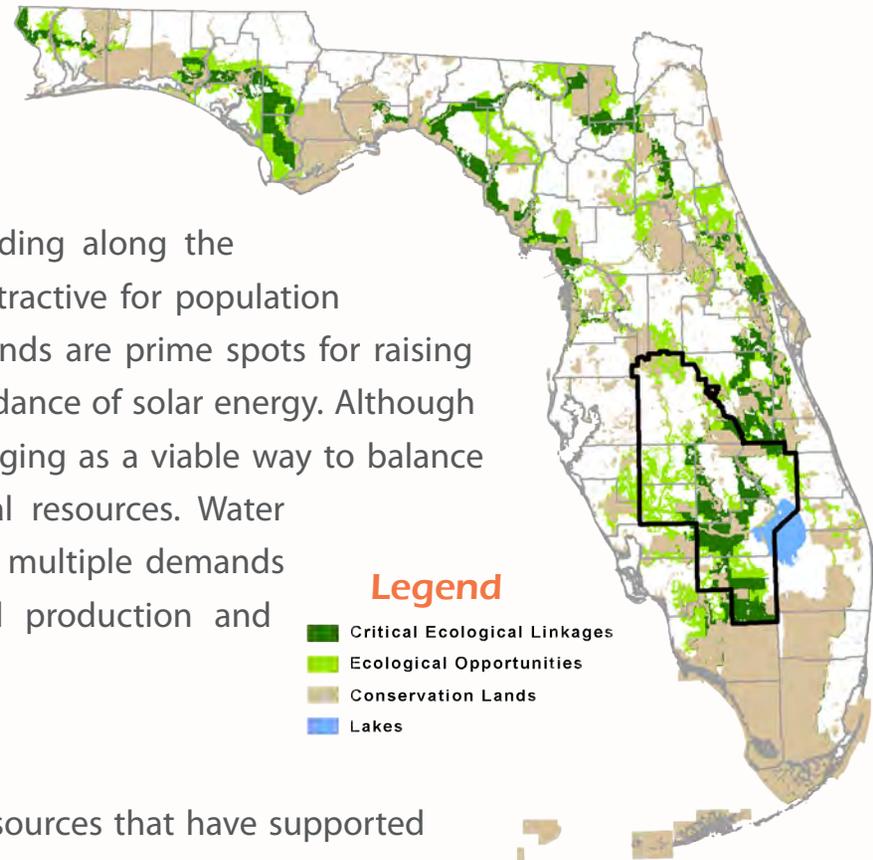
As the population, and the cost of developing and residing along the coasts continues to rise, the region may become more attractive for population and economic development. The Heartland agricultural lands are prime spots for raising crops, food, or fuel. Our unique location provides an abundance of solar energy. Although agricultural employment has declined, ecotourism is emerging as a viable way to balance employment and preservation of natural resources. Water resources continue to be stressed by multiple demands of population growth, agricultural production and industrial operations.

Sun, soils, and central location make the Heartland very suitable for growing biofuel crops.

Opportunities

The region has abundant natural resources that have supported

Florida Greenways Network



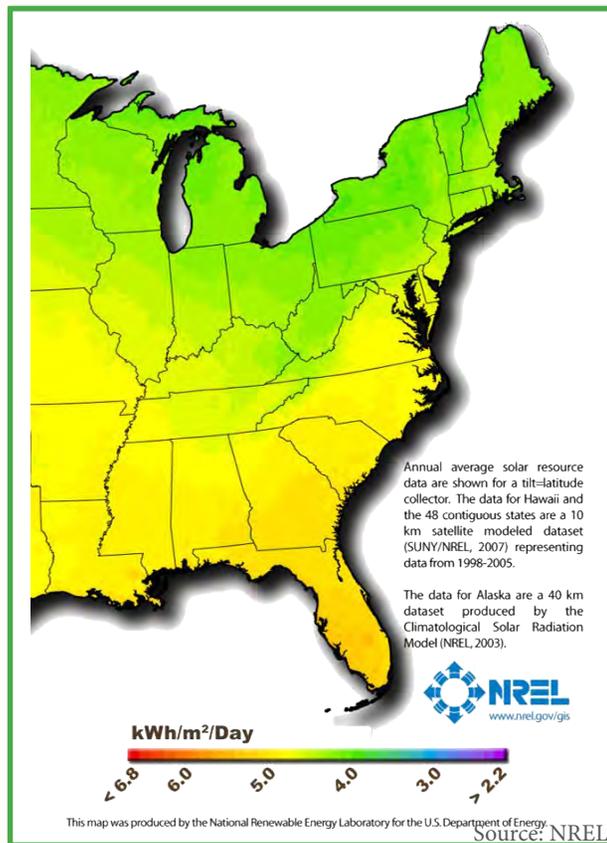
Source: Florida Office of Greenways and Trails

strong industries of phosphate mining and citrus groves and processing. Ecotourism is an important future industry, and the region's unique ecosystems are a natural fit for this activity. Many key linkages in the state's greenway network are located in the Heartland, which is both an opportunity and a challenge. Solar resources in the Heartland have great potential for alternative energy or growing biofuel crops.

Challenges

The agricultural industry still has a strong employment presence, but has experienced decline in recent years. Agricultural diseases continue to be a threat to crops. There is pressure to urbanize greenfields and agricultural lands.

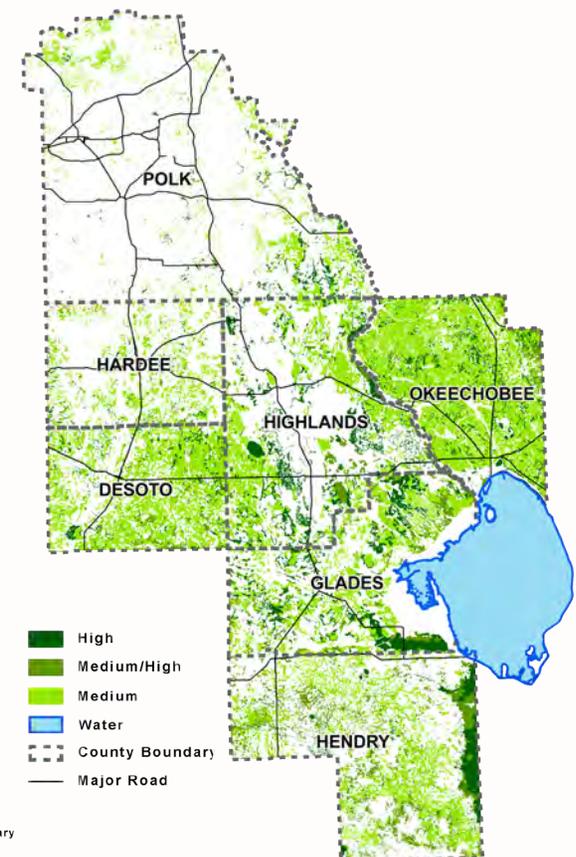
Photovoltaic Solar Resource of the USA



Environmental planning must respect private property rights and development needs. The water supply must be protected, as the region's supply of water from the Floridian Aquifer is limited. Additionally, phosphate reserves are a finite resource.

The Florida Heartland gets more solar energy than any area in the eastern United States.

Biofuels Soil Suitability





Transportation & Land Use

Transportation

Trends

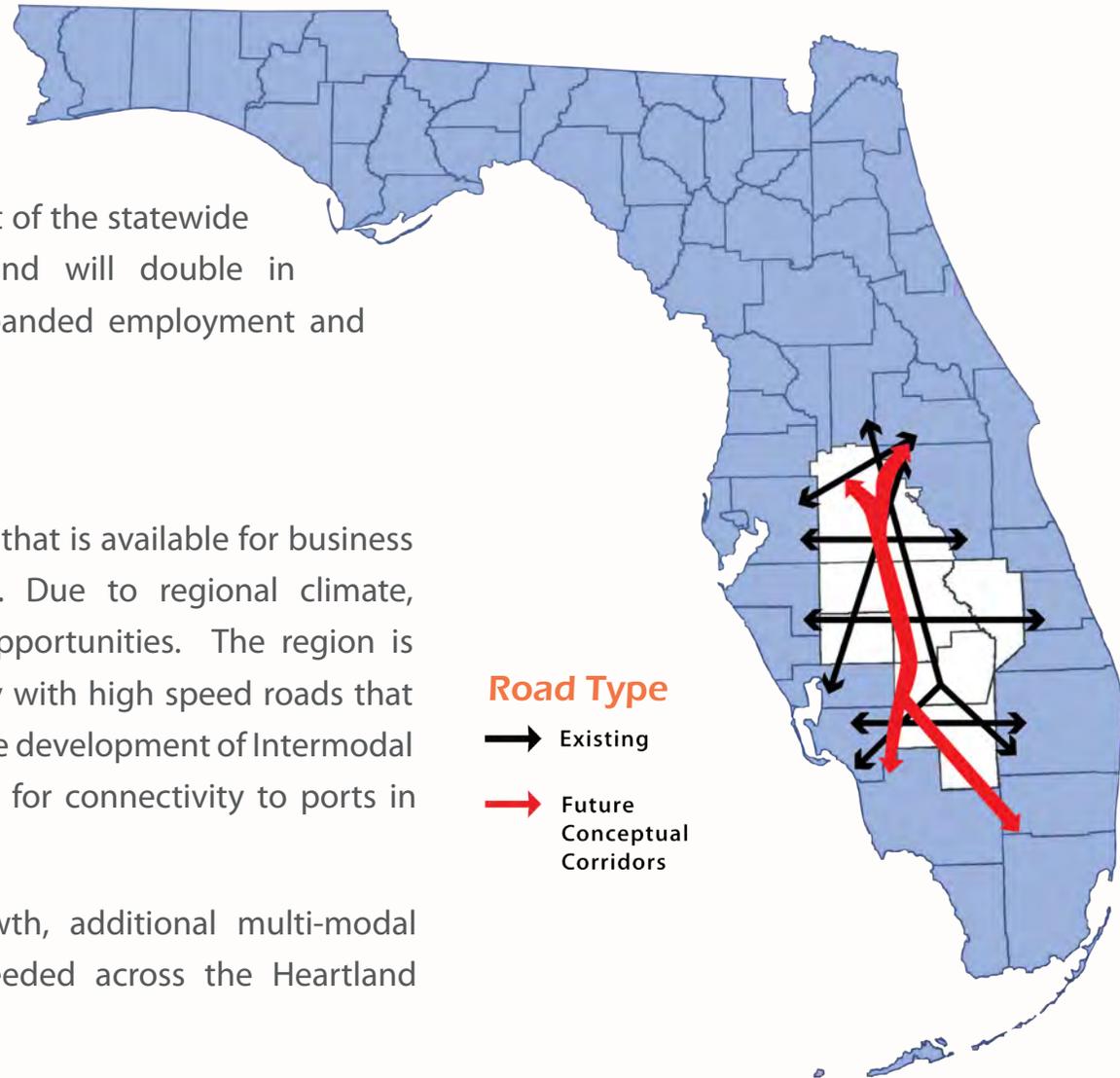
The regional transportation network moves freight and people both within and through the region as part of the statewide transportation system. The Heartland will double in population creating demand for expanded employment and residential areas.

Opportunities

The region has a large supply of land that is available for business development at competitive prices. Due to regional climate, alternative energy provides many opportunities. The region is developing a logistics reliant industry with high speed roads that facilitate freight transportation and the development of Intermodal Logistics Centers (ILCs) and planning for connectivity to ports in order to move goods.

To accommodate the forecast growth, additional multi-modal transportation corridors may be needed across the Heartland region.

Regional Transportation Network



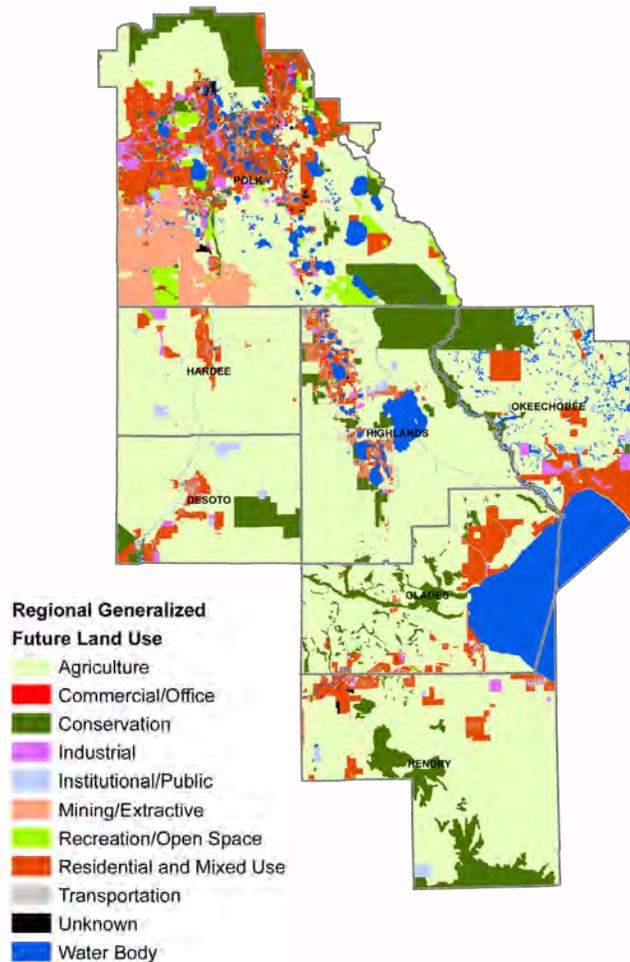
Challenges

Although the average commute time in the Heartland is shorter than state average, public transportation is not readily available in the region. Personal vehicles are heavily relied upon and residents are vulnerable to the fluctuating prices of gasoline. There is potential for negative effects related to the creation of new transportation corridors. Avoidance of and minimizing

55% of Heartland commuters live within a half hour of work.

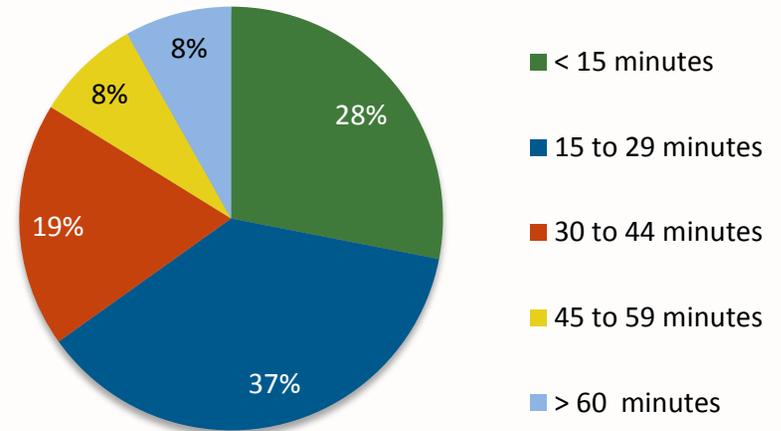
impacts to key ecological greenways and habitat corridors should be highest priority.

Future Land Use



As population increases and roadways become more congested, commute times may increase. Greater commute times means more unhappy drivers and fewer hours for residents to participate in their community's activities. In addition, more commuting can mean a more sedentary lifestyle, which can contribute to poor health outcomes. The Heartland highway system currently has more available capacity than in other regions of the state, but without additional alternatives many key routes will face increasing delay and reduced reliability by 2060.

Commutes for Heartland Workers

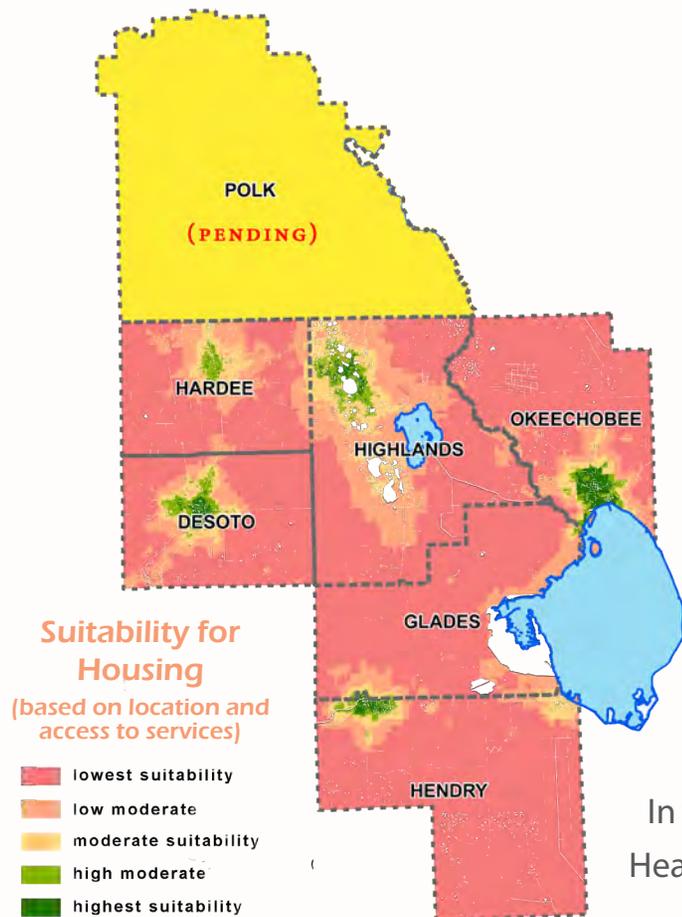


Source: U.S. Census

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. Many of the cities and towns in the region have historic districts designated for the preservation of historic houses and other buildings. Of the housing units in the region, 60.5% are single-family, 26.0% are mobile homes, 13.0% are in multi-family buildings, and 0.5% are boats, RVs, vans, or other similar units.

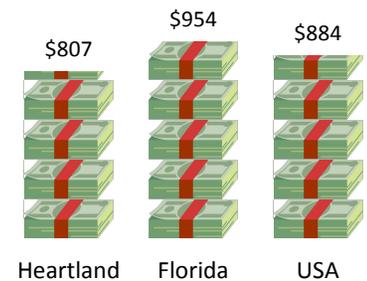
Residential Suitability



Trends

Median home sale prices in the Heartland have stabilized and are increasing although they are still below the state and national averages. Median gross rent is also below that of the state and the nation. In terms of residential suitability (housing locations are most ideal when in close geographic proximity to schools and employment), existing urban centers whether in rural or urban counties are most suitable for affordable and workforce housing.

Median Gross Rent



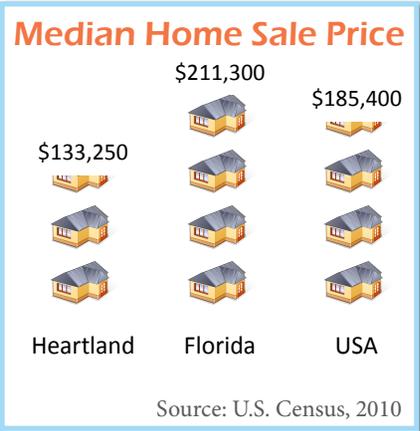
Source: U.S. Census, 2010

Opportunities

Despite the increased foreclosure activity in recent years, the region maintains a higher rate of home ownership than the state or the nation. In turn, housing remains more affordable than in recent years. In fact, 82% of single family parcels and 67% of multi-family parcels in the Heartland are affordable to median income households.

Challenges

A high percentage of mortgages in the state are “underwater” (the mortgage on the home exceeds the current market value of the home), and this is presumably true of the Heartland region. This could result in more foreclosures. A significant portion of the region’s population lives in mobile homes, which are more vulnerable to extreme weather events such as hurricanes. Some areas of the region have a large population of migrant workers for whom housing is often substandard or difficult to obtain



Community Trends

In 2010, 36.9% of Heartland adults are considered “obese”; far above the state adult obesity rate of 27.2%. Along with an aging population, healthy communities are a priority for the residents. Obesity is linked to increased morbidity and reduced health outcomes. Obesity is also linked to poverty. The Heartland is more obese, as a region, than most other places in the state.

The Heartland is projected to have over 1.7 million residents by 2060.

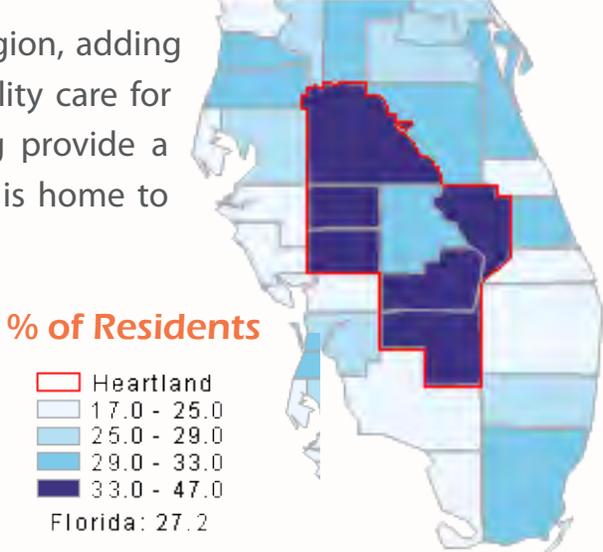
Opportunities

Health care continues to be a growth industry in the region, adding jobs and providing access to medical facilities and quality care for the residents. Natural amenities and proper planning provide a foundation for more healthy communities. The region is home to many cultural amenities of value to residents of all ages.

Challenges

As youth continues to move out of the area to pursue other opportunities, the population becomes disproportionate and the workforce suffers. The aging population requires more health care, transportation, and housing options.

Obesity Rates



Source: Florida Dept. of Health, 2010

The Present Economy

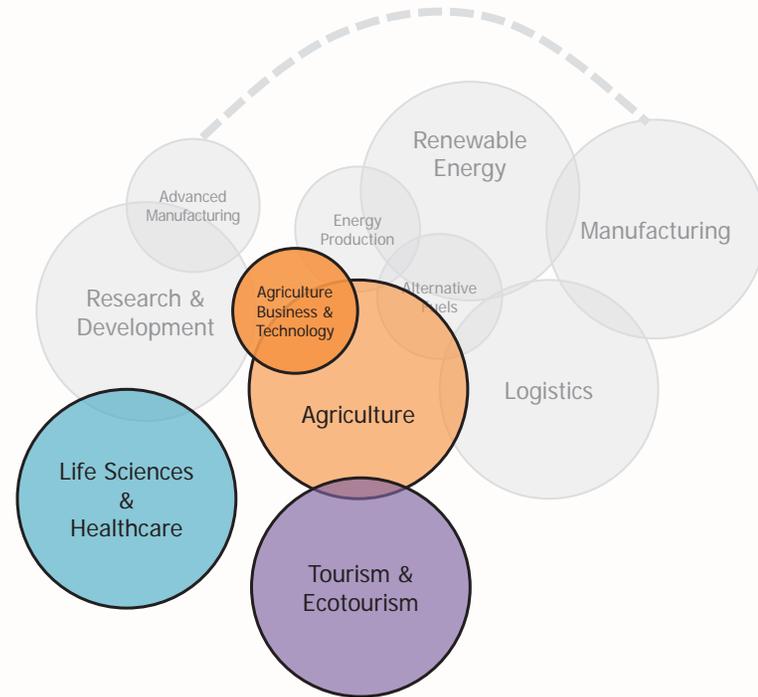
A future that resembles the present

The Future "Current" Economy projects a future which is based on the present and follows current and historical trends in population, employment, and land use. This Future continues the current economic prominence of agriculture, healthcare, mining, warehousing, ecotourism, and service industries.

Total employment in the Future "Current" Economy for the region is projected to increase by nearly 97% to close to 690,000 jobs. The majority of these jobs are projected to be in existing employment centers.

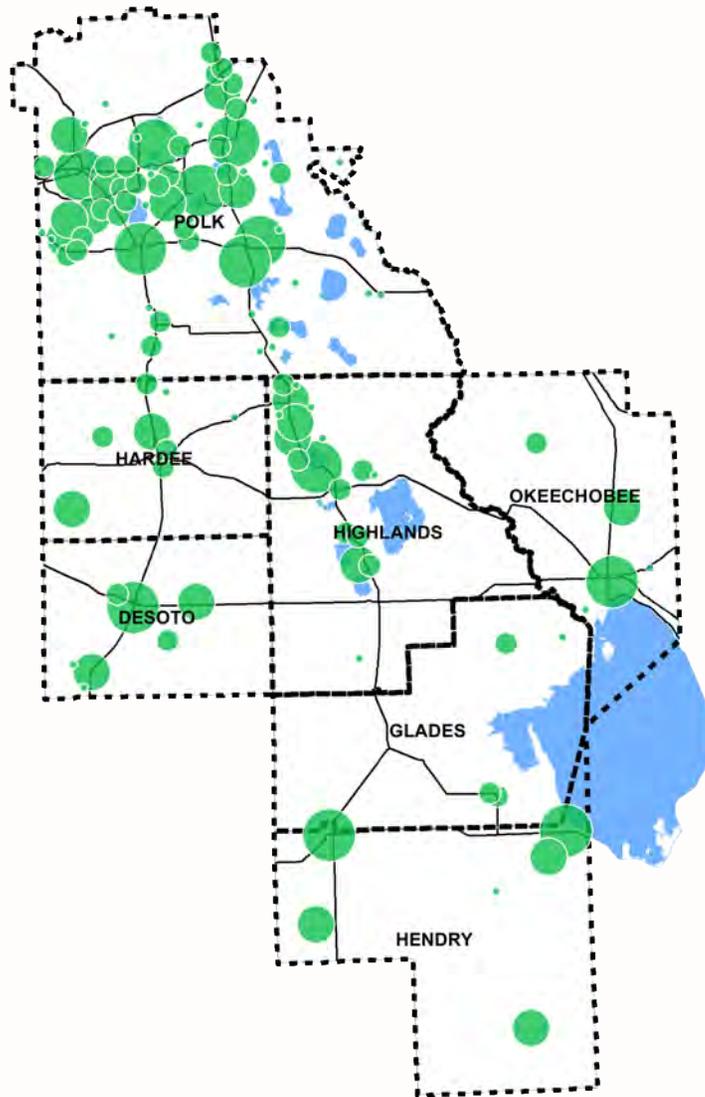
The employment in today's economy reflects over **350,000 jobs**.

Targeted Industry Clusters in Current Economy

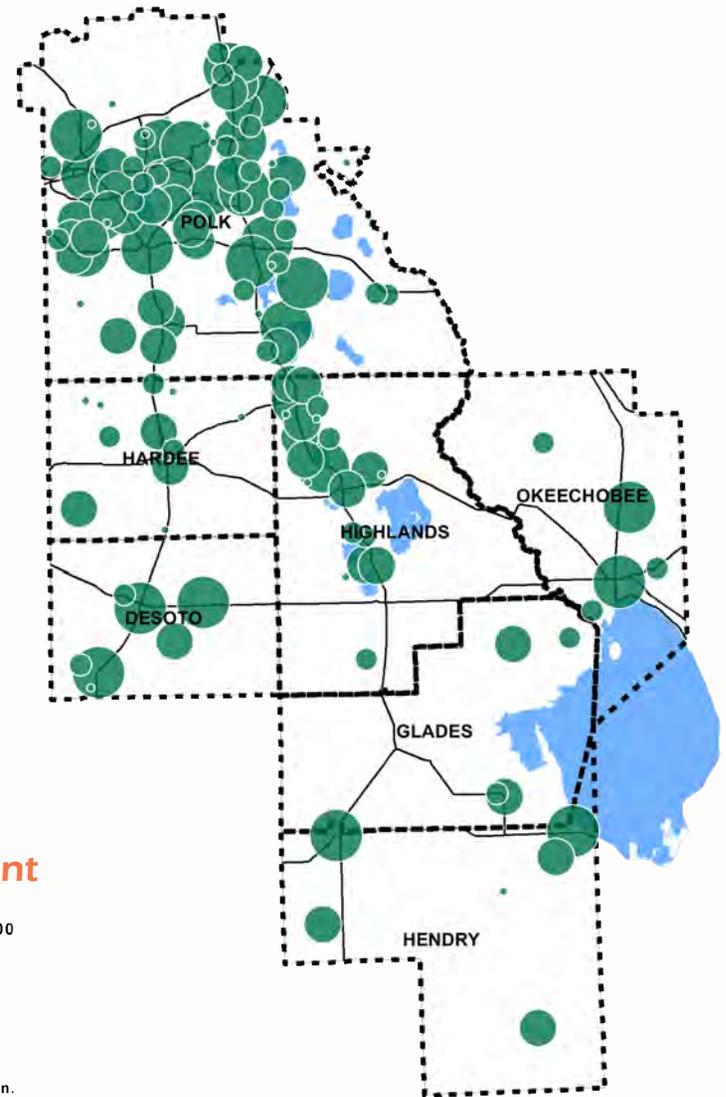


If we continue with business-as-usual, including healthcare, natural resources, and ecotourism, then we can expect our future to look like...

Today's Economy



Future "Current" Economy (2060)



Employment

- 5,001 - 130,000
- 2,001 - 5,000
- 751 - 2,000
- < 750*
- Lakes

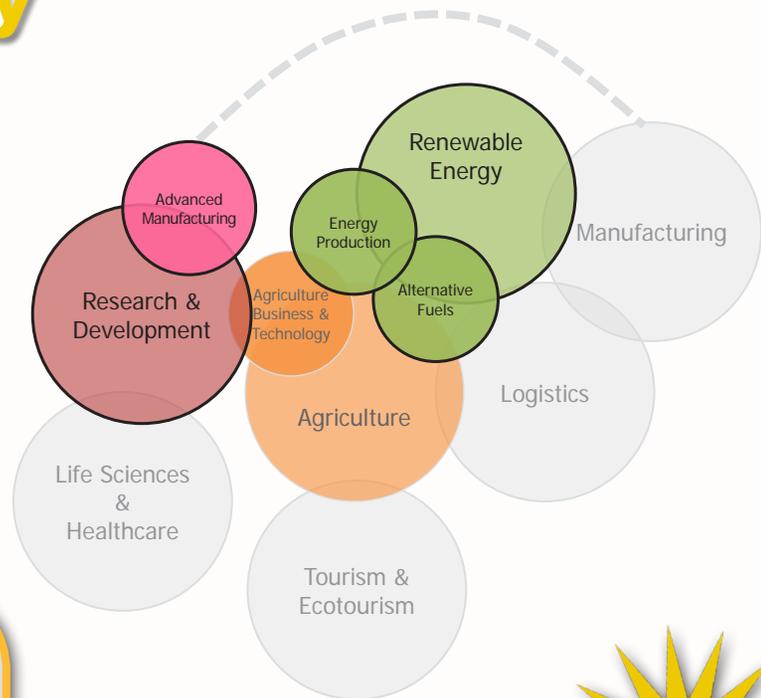
Areas with fewer than 200 jobs are not shown.

Energy-Focused Economy

A future that is focused on energy

By focusing economic development on certain industry clusters, the Heartland can enhance 9 existing and future employment centers utilizing existing infrastructure and regional competitive advantages. This focus on technology, research-and-development, alternative fuels, and renewable energy generation can help secure a place in the Florida mega-region as a top energy-provider and advanced manufacturing location.

Targeted Energy Industry Clusters



The Energy Economy is a future focused on:

- Developing an alternative fuels industry based on agriculture
- Manufacturing and installing renewable energy technologies
- Using high-tech energy technologies to become an energy exporter
- Energy efficiency and conservation technologies

In the Energy-Focused Economy, Manufacturing, and Professional, Scientific, and Technical Services employment are projected to increase by 11% over the Current Economy.



Trade-Focused Economy

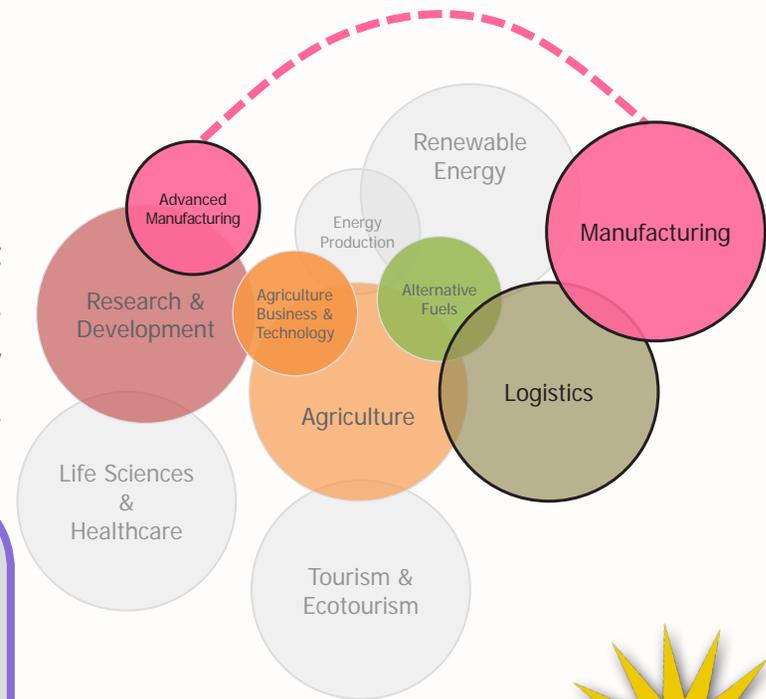
A future that is making and moving goods

The Trade Economy includes 9 existing and future employment centers, and is an economy that makes, handles, and moves goods, including processing, packaging, and logistics. This economy anticipates and accounts for different workforce demands, infrastructure needs, and industry locational requirements.

The Trade Economy is a Future focused on:

- Uses current and future industrial areas and logistics and trade networks
- Maintains high capacity transportation networks for moving goods
- Enhances distribution of air cargo and connects ports
- Establishes advanced manufacturing and warehousing facilities

Targeted Trade Industry Clusters



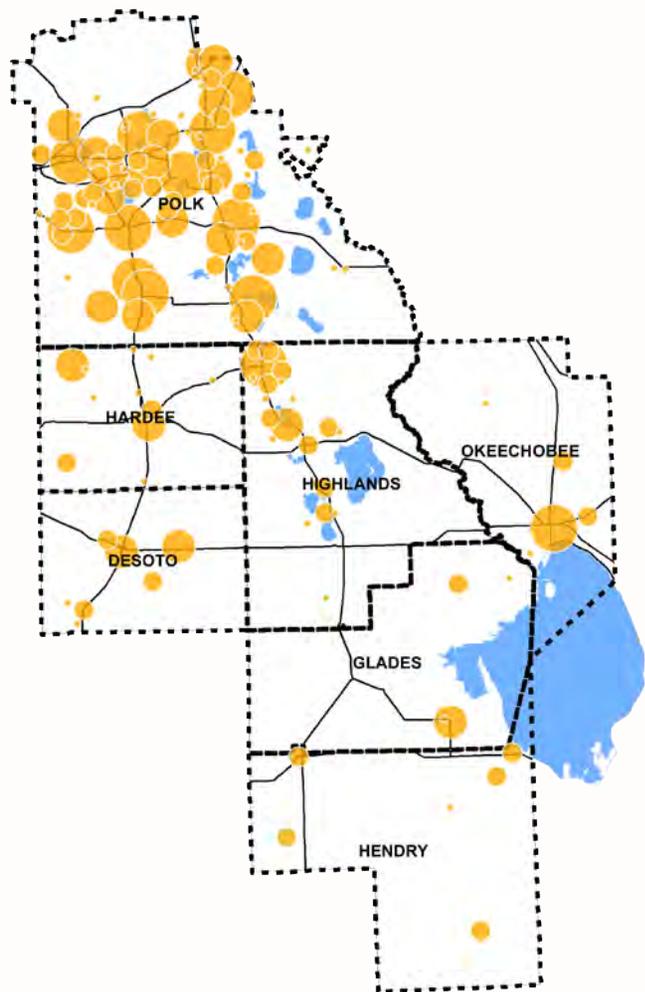
In the Trade-Focused Economy, Transportation and Warehousing, and Manufacturing employment are projected to increase by 10% over the Current Economy.



Where Could We Go?

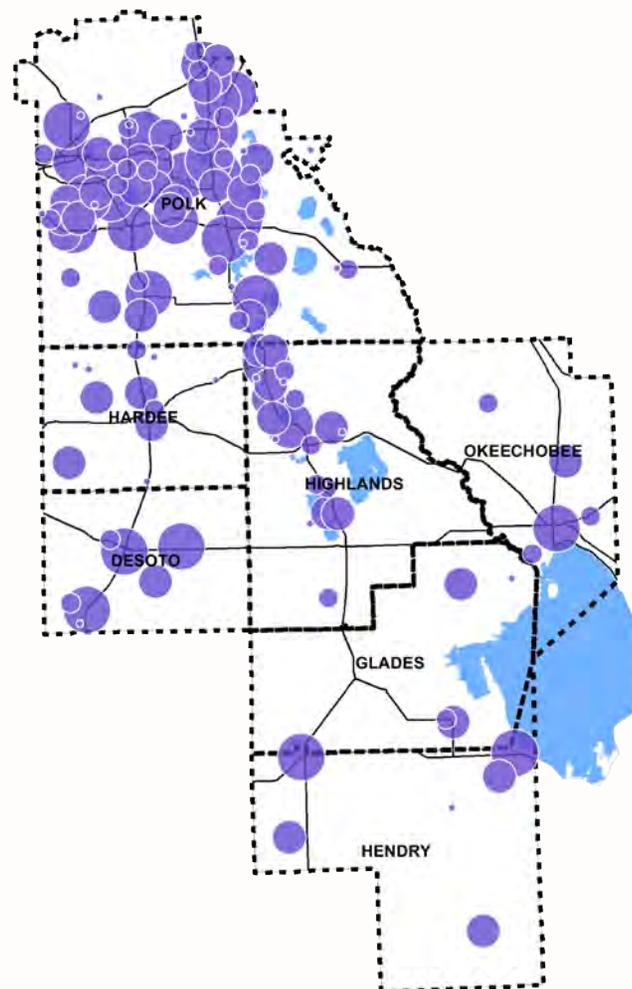
If we focus on supplying technologies and goods that create energy and become energy exporters, then we can expect our future to look like...

Energy-Focused Economy (2060)

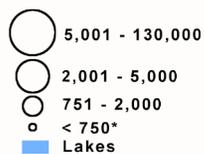


If we focus on employment hubs for manufacturing, transportation, and warehousing, then we can expect our future to look like...

Trade-Focused Economy (2060)



Employment



Areas with fewer than 200 jobs are not shown.

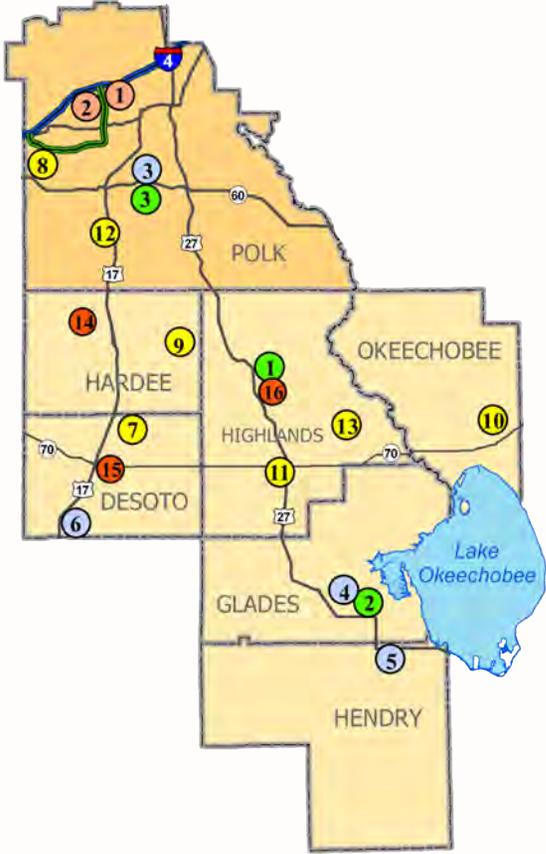
In addition to the 689,000 jobs in the Future "Current" Economy, close to 14,000 extra jobs (2%) are projected to be focused in existing and new regional employment centers (9 in Energy Economy and 9 in Trade Economy).

Charting a Course

Creating Our Future

Key Projects, Opportunities, and Investments for the Heartland Region have been identified in the Comprehensive Economic Development Strategy (CEDS). The CEDS identifies the benefits of increased employment and higher wage jobs that a more highly skilled workforce would bring to the region. Identification of opportunities and investments being made in the region creates a roadmap to economic diversity to foster a more stable and growing economy.

Comprehensive Economic Development Strategy



- Key Projects and Investments**
(Numbers do not imply priority)
- Key Projects**
- 1 RACEC Catalyst Project
 - 2 Americas Gateway
 - 3 Polk Gateway (CSX)
- Investments**
- Research and Development
- 1 Polk Commerce Center
 - 2 Florida Polytechnic
- Logistics
- 3 CSX Logistics Center
 - 4 Americas Gateway
 - 5 Airglades Airport
 - 6 US 17 S Distribution Center
- Renewable Energy
- 7 DeSoto Next Gen. Solar Farm
 - 8 Lakeland Electric Solar Farm
 - 9 National Solar
 - 10 LS9 Biofuels Facility
 - 11 US EnviroFuels
 - 12 US EcoGen Polk
 - 13 BP Biofuels
- Opportunities**
- 14 Hardee Co. Commerce Park
 - 15 GPW Mem. Hosp./Business Pk
 - 16 Sebring Airport
- Broadband
- Polk
 - FRBA

There are opportunities in a number of industries, some of which are targeted clusters and potential futures for the region.

Regional Economic Development Investments:

- Research and Development
- Logistics
- Renewable Energy
- Broadband

The Key Projects identified in the CEDS are projects currently underway and are projected to have a positive impact on employment in the region. Opportunities have been identified based upon their potential, their location, and their infrastructure, but are not yet planned projects. There are investments underway and planned for the future of the region that will positively impact the business communities and residents, and are associated with targeted future industry clusters.

Education, Workforce, & Economic Development

Providing quality jobs for all residents, attracting growth industries to the region, and providing lifelong learning opportunities for residents will create opportunities in the future. We can improve the educational pipeline for our children, fostering a lifelong love of learning.

Key Questions

- How do we grow local businesses and provide quality jobs?
- How do we prepare our future workforce?

Goals

- Enhance lifelong learning opportunities for Heartland residents
- Encourage innovation and creativity in education at all levels
- Develop, attract, and retain a skilled workforce to meet future employer needs
- Support existing and new business
- Increase the share of employment in skilled labor occupations
- Improve the Heartland's telecommunications and information technology infrastructure
- Strengthen the Heartland's energy, logistics and manufacturing, agricultural, tourism and recreation industries
- Support both established and emerging regional employment centers

Key Issues:

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



Environment & Natural Resources

Florida's Freshwater Frontier boasts miles of canoeing routes, world class bass fishing, bird watching, turkey and deer hunting, and boundless recreational opportunities. The Heartland will become one of the key areas in the state for land conservation and water protection in the future. The splendor of these natural resources will be conserved for the enjoyment of future generations.

Key Questions

- How will we work together to preserve important natural resources?
- Which resources are top priorities?
- How can we conserve our limited resources?

Goal

- Protect natural resources to ensure recreational opportunities including fishing, hunting and eco-tourism
- Reduce conflicts between natural areas and development by identifying key ecological resources.

Key Issues:

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





Transportation & Land Use

Tomorrow's transportation system will connect the Heartland's centers, efficiently move people and goods to, from, and through the region, provide reliable emergency evacuation routes, and enhance the mobility and choices of our residents. Transportation decision-making is linked with land use and development patterns which ultimately affect how we get to work and to school, and how far from our homes are essential services and shopping centers.

Key Questions

- In what kind of transportation system shall we invest and where?
- How do we link new communities with existing towns?

Goals

- Improve coordination of economic development, land use, infrastructure, transportation, and natural resource planning
- Develop transportation systems to support a prosperous, globally competitive economy and improves the quality of life for Heartland residents while minimizing impacts to the natural environment
- Encourage development of affordable and attainable housing in all communities of the Heartland
- Creating and enhancing a north-south multimodal corridor with connections to major markets

Key Issues:

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



Community Resources

Our communities must retain their home town atmosphere, historic downtowns, and cultural amenities, while providing services and social opportunities to residents living throughout the region. Our health care systems must be able to respond to the needs of all residents. Growth can encourage healthy and vibrant communities.

Key Questions

- How can we grow while preserving our values?
- How can we address the health, cultural, and social needs of residents as we grow?

Goals

- Encourage youth to remain in the Heartland
- Strengthen and promote a regional identity for the Heartland that reflects its vibrant, diverse, and collaborative communities
- Improve the region’s quality of life and enhance the health and wellness of its residents
- Promote the Heartland’s arts, cultural, and historic resources

Key Issues:

- Health Care
- Cultural Resources
- Cultural Identity





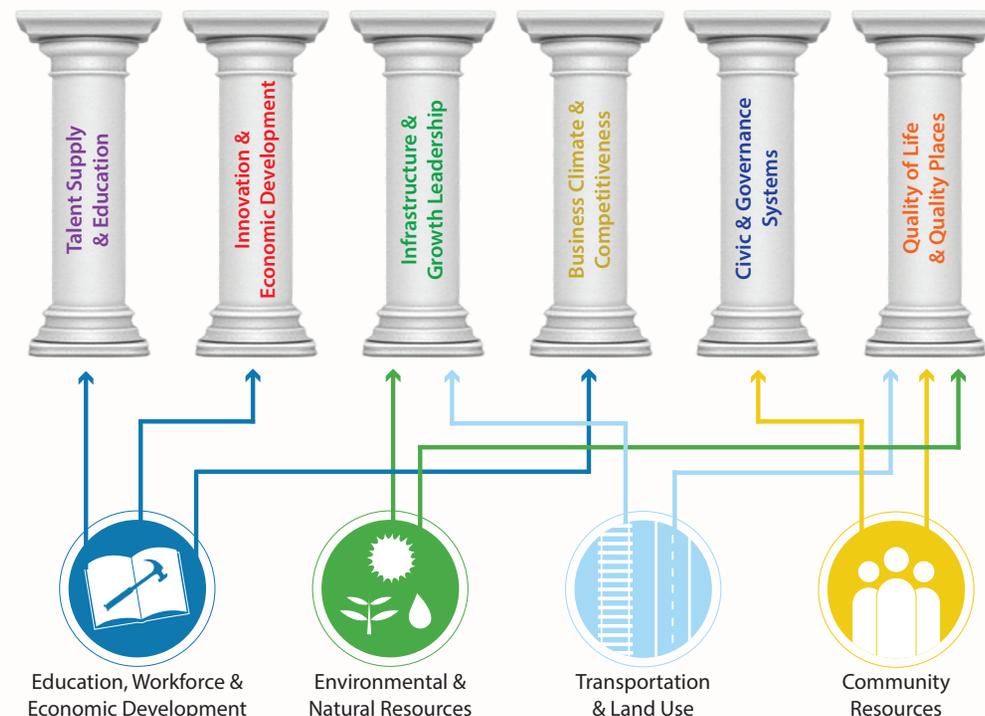
New Direction

Moving Forward Together

Through Heartland 2060, the region is working together so that we and future generations may have the opportunity to live our values in a world that is constantly changing. By building a more resilient region, citizens, business and government can respond to changes beyond our control in a cooperative, proactive partnership based upon shared goals and established relationships.

In order to accomplish this over the coming decades, there must be a strategic plan of action to engage decision makers, community leaders, business owners, educators, environmentalists, and citizens of all ages. The Heartland

Florida Chamber Foundation's Six Pillars of Florida's Future Economy™



2060 Five Year Strategic Action Plan will be web-based on www.heartland2060.com.

Benchmarks will be evaluated annually to measure progress toward meeting goals and for consistency with regional and state economic development plans. Strategic actions may include update of comprehensive plans, adoption of strategic or capital funding plans, creation of programs and training, staging of events or festivals, or any of a wide variety of activities undertaken by government, private sector, non-profits and community organizations.

The Six-Pillar Platform will be used to guide the Five-Year Strategic Action Plan - available at www.heartland2060.org.



Building Capacity

Shared Knowledge

Scenario Modeling

Regional Generalized Future Land Use Map (Generalized FLUM)

The Future Land Use Element of every local Comprehensive Plan in the region (7 counties and 28 cities) were gathered, standardized, and combined into a database that summarizes the desired future development pattern for the region.

Transportation Cost Model (TCM)

Transportation-related costs were estimated for the entire Heartland region by examining a location's proximity to jobs, goods, and services. These factors were estimated based on household size, location, and fuel costs.

Sea Level Rise (SLR)

The potential future displaced population that might migrate to the Heartland was estimated assuming a three foot rise in sea level by the year 2060. Ultimately, there were not enough extra immigrants (only ~0.6% extra) to justify alternative scenario development.

Land Use Conflict Identification Strategy (LUCIS)

This report outlines the methodology for the model and process that projects future land use patterns and development for each of the three Heartland Economic Futures. The LUCIS model identifies conflicts between certain characteristics associated with individual areas of land and balances those conflicts according to user-defined criteria.

Heartland Economic Futures

Three future development scenarios, or Futures, were envisioned as either a continuation of the Current Economy, or alternative Futures focused on alternative energy or trade and logistics. Alternative future scenario modeling is used to project these Futures and estimate their impact on employment and residential development trends to give local officials a tool for use in planning and decision making.

Population Projections Methodology

Population projections to the year 2060 were created for the seven Heartland counties. These projections were used in the scenario modeling.

Employment Projections Methodology

Employment projections to the year 2060 were created for the seven Heartland counties, in each of 23 different NAICS employment categories. These projections were used in the scenario modeling.

Affordable Housing

Housing Suitability Model (HSM)

The Housing Suitability Model (HSM) was developed by the University of Florida Shimberg Center for Housing Studies. The model uses local data to create a spatial snapshot of affordable housing suitability of the region.

Fair Housing and Equity Assessment (FHEA)

The Fair Housing Equity Assessment (FHEA) uses HUD-provided and local datasets to investigate the status of housing with regard to race and poverty.

Affordable Parcel Inventory (API)

To measure residential affordability, housing and transportation costs were estimated for every residential parcel. Rent, mortgage, property taxes, homeowner's insurance, utilities, and transportation costs were estimated for each residential parcel.

Energy

Florida Heartland Greenhouse Gas and Energy Baseline Inventory (EBI)

This comprehensive assessment of greenhouse gas emissions and energy use for the entire Heartland region is groundbreaking in its depth and breadth of scope.

Florida Energy Resiliency Report (FERR)

Florida's energy vulnerabilities and opportunities are assessed and strategies are provided for improving economic resiliency to potential energy supply disruption events, as well as case studies of early adopters of energy resiliency technologies.

Economic Development

Comprehensive Economic Development Strategy (CEDS)

The Heartland region's Five-Year Comprehensive Economic Development Strategy analyzes the economic health of the region and creates a roadmap for the future. The CEDS identifies goals, key projects, opportunities, and investments as well as establishes indicators to track the progress being made.

Environment and Natural Resources

Heartland Ecological Assessment Report

Used in the Futures modeling, this dataset prioritizes land based on its ecological value and is useful for conservation planning at state, regional, and local levels.

Regional Assessment of Critical Lands and Waters (Regional CLIP) for the Cooperative Conservation Blueprint (CCB) Pilot Project

The Heartland Futures modeling uses a combination of ecological priorities data from both the Florida Fish and Wildlife Conservation Commission Cooperative Conservation Blueprint Regional Pilot Project (CCB) and the original Heartland 2060 ecological priorities. This dataset prioritizes land based on its ecological value.

Cooperative Conservation Blueprint (CCB) Regional Pilot Project

This multi-partner strategic conservation process has created conservation incentives to provide for wildlife habitat and connectivity priorities across Florida.



Acknowledgments

Heartland 2060 is an ongoing effort to build a resilient region that can work towards a better economic future for the citizens of the seven-county Heartland region while keeping the best of our natural resources and our communities for today and for generations to come.

Heartland 2060 is about people, and our thanks to all who have participated in the early years of meetings, research, sharing of ideas and volunteering your valuable time.

From the first foundational meeting in late 2007 through:

- **12** Leadership Team Meetings;
- **16** Task Force meetings on Education, Workforce & Economic Development; Environment & Natural Resources; Transportation & Land Use; and Community Resources;
- **6** Focus Group Meetings;
- **3** Weighting Workshops;
- **2** Goal Setting Meetings;
- **6** Housing Work Group Meetings;
- **4** Comprehensive Economic Development Strategy Meetings;
- **20** Heartland 2060 Consortium Partner Meetings; and to-date,
- **20** Public Engagement/Community meetings:

with presentations and discussions in small groups and large, to young people, senior citizens, minority neighborhoods, handicapped citizens, cities, counties, and economic development organizations, to name but a few, the Heartland has developed its voice. Our heartfelt thanks for being a part of the journey. To all Heartland citizens of today and those who will arrive tomorrow, please join us as we work together to build a resilient region.

Leadership Team

60 Individuals that gave us our start

Four Task Forces led by:



Education, Workforce, & Economic Development

Mark Morton, Lykes Bros Inc.

Jim Otterman, Florida's Heartland Rural Economic Development Initiative (FHREDI)



Environment & Natural Resources

Tricia Martin, The Nature Conservancy

Ray Royce, Heartland Agricultural Coalition



Transportation & Land Use

Tom Deardorff,

Polk County Development Services



Community Resources

Lisa Jensen,

Private Sector

Consortium and Visioning Partners:

- DeSoto County
- Glades County
- Hardee County
- Hendry County
- Highlands County
- Okeechobee County
- Polk County
- Polk Vision
- Archbold Biological Station
- Florida's Heartland Regional Economic Development Initiative (FHREDI)
- Heartland Workforce
- Sebring Airport Authority
- Shimberg Center for Housing Studies at the University of Florida
- Heartland 2060 Housing Work Group
- Over 50 government, educational, economic, environmental, non-profit, and civic organizations throughout the Heartland region.
- U.S. Dept. of Housing and Urban Development
- U.S. Economic Development Administration
- Florida Dept. of Transportation, Office of Policy Planning and District One
- John Kaliski and Cambridge Systematics



Central Florida Regional Planning Council

555 E Church St

Bartow, FL 33830

www.cfrpc.org



www.heartland2060.org

