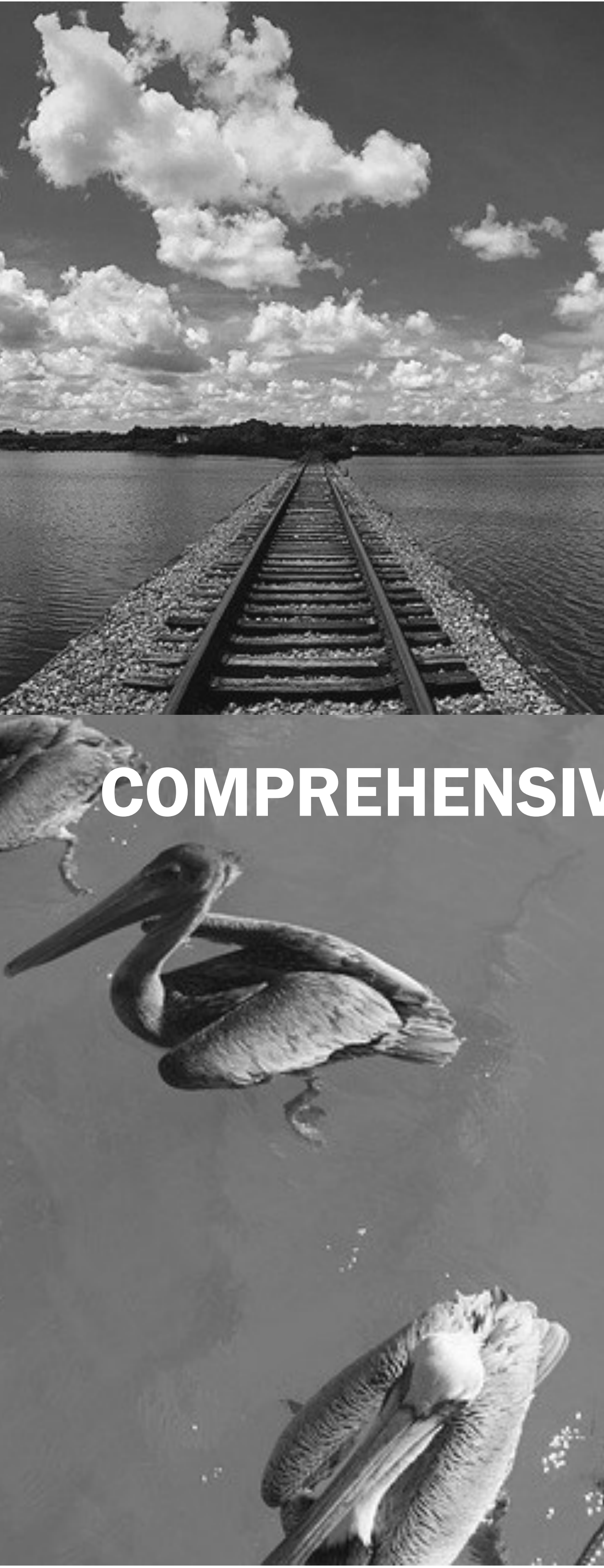


COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

Apalachee Region Economic Development District

2018-2022

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2018

Apalachee Region Economic Development District serving Calhoun, Franklin, Gadsden, Gulf, Jackson, Jefferson, Leon, Liberty and Wakulla counties

United States Department of Commerce
Economic Development Administration
Atlanta Regional Office
Suite 1820
401 W Peachtree St, NW
Atlanta, GA 30308-3510

Apalachee Regional Planning Council
2507 Callaway Road, Suite 200
Tallahassee, FL 32303

This document is prepared and updated with financial assistance from the U.S. Economic Development Administration.

Table of Contents

Executive Overview

Apalachee Go-Getters: An interconnected region that grows big through a cornucopia of small initiatives

Apalachee Regional Planning Council assembles the Comprehensive Economic Development Strategy (CEDS), which provides an analysis of existing economic conditions and strategies for future growth. The Apalachee Region encompasses nine diverse counties with one major metropolitan center – Tallahassee - and several satellite areas where jobs concentrate.

The 2013-2017 Apalachee CEDS incorporated the Florida Chamber Foundation's Six Pillars Strategy to promote Economic Development, which standardized indicators and data sources across Florida's Regional Planning Councils (RPCs). This version of the Apalachee CEDS continues the focus on the Six Pillars, acknowledging their broad appeal. The 2018 CEDS also references a newcomer to the Florida Panhandle regional development ecosystem – Florida's Great Northwest *NW FL Forward* Plan.

The 2017 Apalachee CEDS focuses on bringing its bold, regional, economically awesome vision to life through three goals (see right):

2018 CEDS Goals

Goal 1

Enhance Interconnectivity and Collaboration

Goal 2

Fortify and Animate Apalachee Strengths

Goal 3

Bring New Voices to the ED Drawing Board

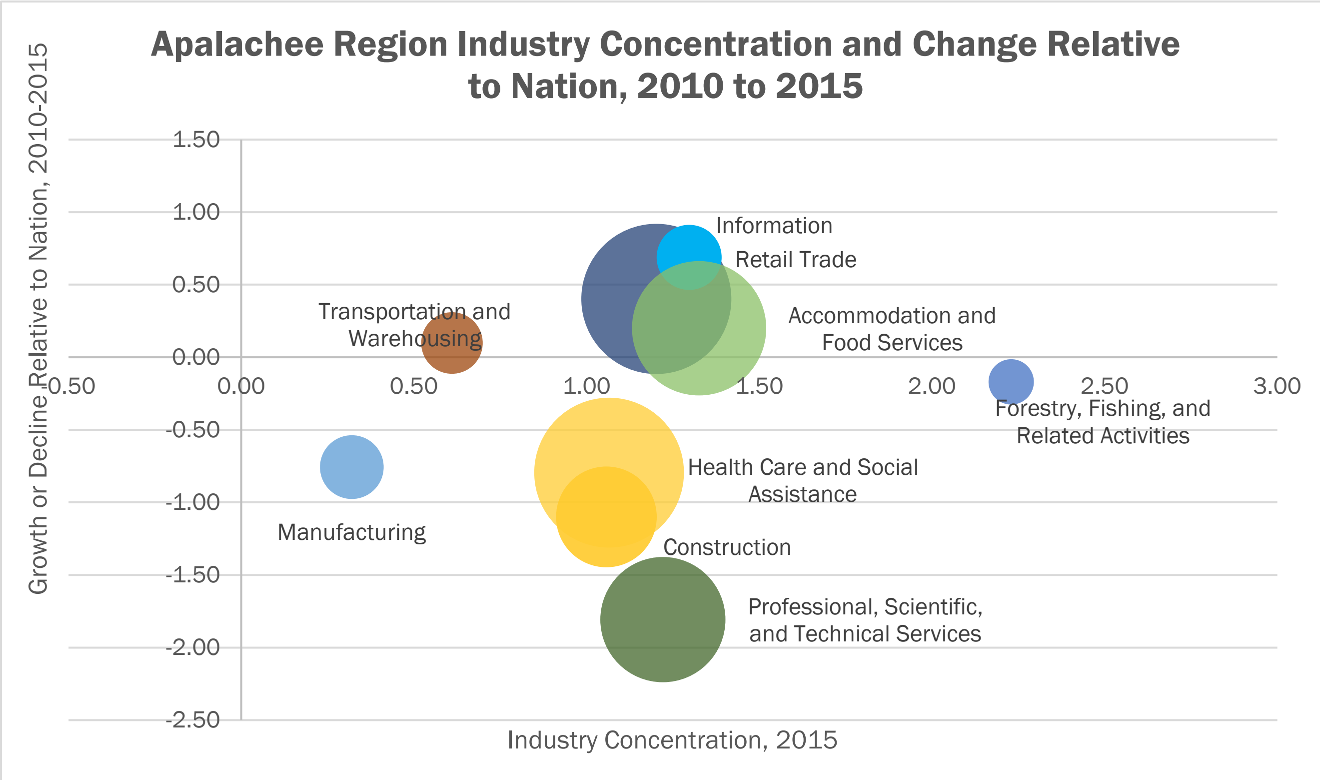


Figure 1: Industry Profile for Apalachee Region, data from REMI PI+

The Region's economy has multiple legs to stand on and can continue to support rapidly growing sectors through targeted assistance to employers, employees, entrepreneurs and students. As shown by Figure 1, Retail Trade, Accommodation and Food Service, Health Care and Social Assistance, and Professional, Scientific, and Technical Services employ the greatest number of people in the Apalachee economy. Information and Retail Trade are outpacing national growth, whereas Healthcare, Construction, Manufacturing and Professional Services are lagging it. Transportation and Warehousing, a rural county target industry, has outgrown the sector nationally. While Forestry, Fishing, and Related Activities is a Regional strength, it was outpaced by growth nationally between 2010 and 2015.

Continued dedication to helping scale emerging and second stage information and agricultural technology companies is crucial to the Region. Startup activity is more robust than ever, with several counties ranking strongly on the Stats America Index for patent creation and diffusion[1].

This CEDS reflects what economic development means, in the 21st century, inside and beyond the Apalachee Region. For that reason, it avoids specific lists of capital projects, which can be found in any of the nine counties' Capital Improvement Schedules. The strategies herein point to economic bellwethers that will continue to evolve as they come into being.

[1] Stats America, Innovation 2.0 Data visualizer: http://www.statsamerica.org/ii2/overview.aspx

FLORIDA CHAMBER FOUNDATION: SIX PILLARS

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

View the "Caucus Areas" or specific sub-pillar focus topics, at this link:

http://www.flchamber.com/research/six-pillars/

Resilience

Economic resilience originates in good disaster preparedness and diversification. In its 2015 report, the National Association of Development Organizations found that "Regional development organizations are in a unique position to guide and support communities and regions towards greater resilience."[2] The Apalachee CEDS examines disaster preparedness and strategies that support diversification. In addition to creating resilient objectives, the CEDS also explores the concept further on p.33.

[2] NADO Research Foundation. "Planning for a More Resilient Future: A Guide to Regional Approaches" 2015

Summary Background

Factors from education to entrepreneurship help gauge the economic health of the Apalachee Region and pinpoint focus areas for the Action Plan. Over 20 indicators inform snapshots of Talent, Innovation, Infrastructure, Business Climate, Governance Systems, and Quality of Life.

Introduction

The Apalachee Region is bouncing back from the recession of 2008, however not all facets of economic and community health are uniformly improving, nor are the data between counties similar. Leon, Jackson and Gadsden counties have the largest Gross Domestic Product; however, Gadsden also registers last on Stats America's Economic Well Being Index. Conversely, Wakulla County scores higher than Leon on that same metric. This section will touch on the findings presented in the Data Appendix, page 41, in greater detail.

The most recent CEDS furnishes 24 goals and 59 objectives. While the 2018 CEDS created new objectives informed by the latest round of stakeholder input, the 2013 objectives persist in importance:

Promote start-ups and entrepreneurship,

Integrate comprehensive planning,

Fortify the talent supply chain,

Encourage further economic diversification,

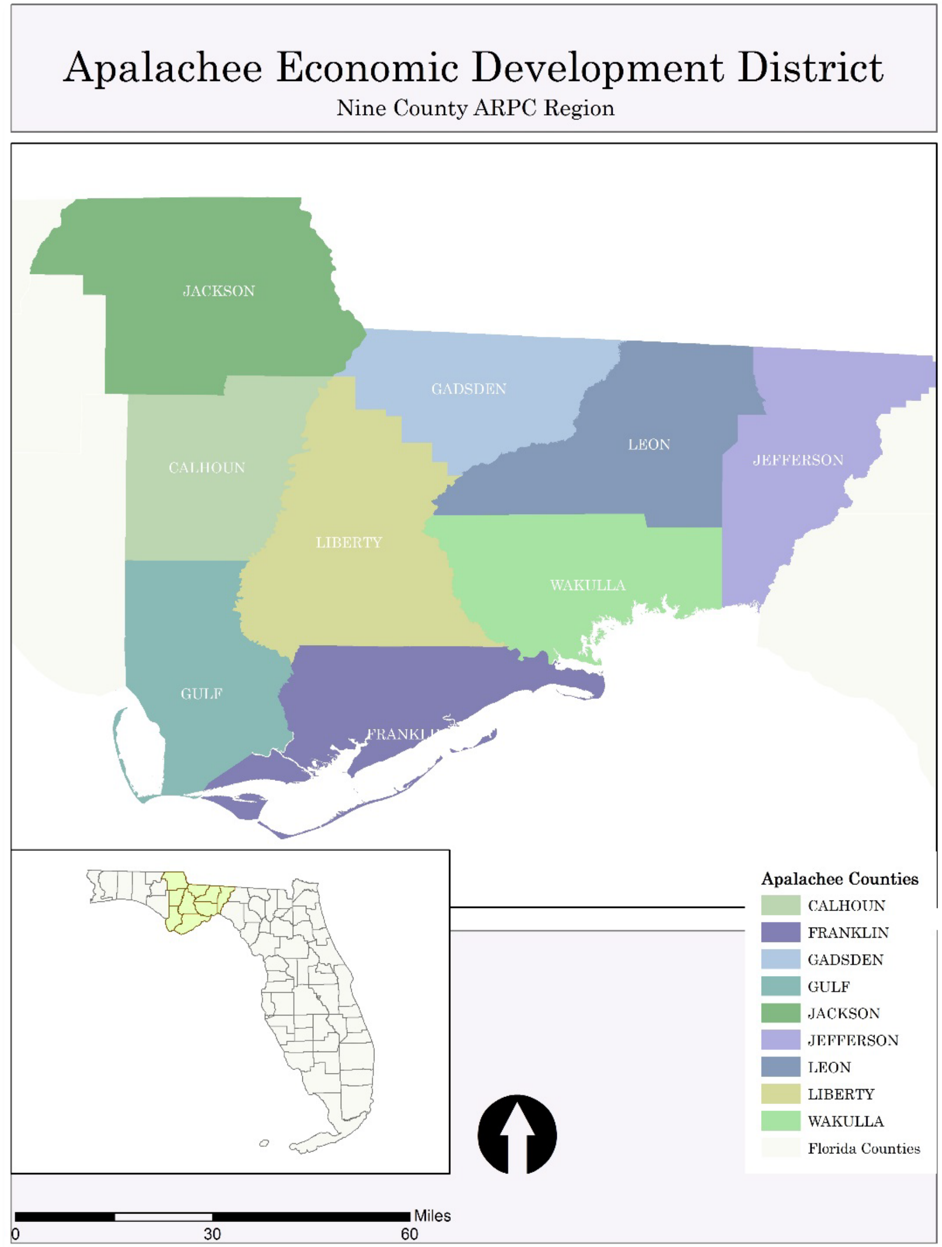
Enhance transportation, broadband, and leadership training access,

Improve public-private information flows,

Meld sustainability to economic development,

Promote eco-tourism,

Better serve impoverished residents.



Talent Supply and Education

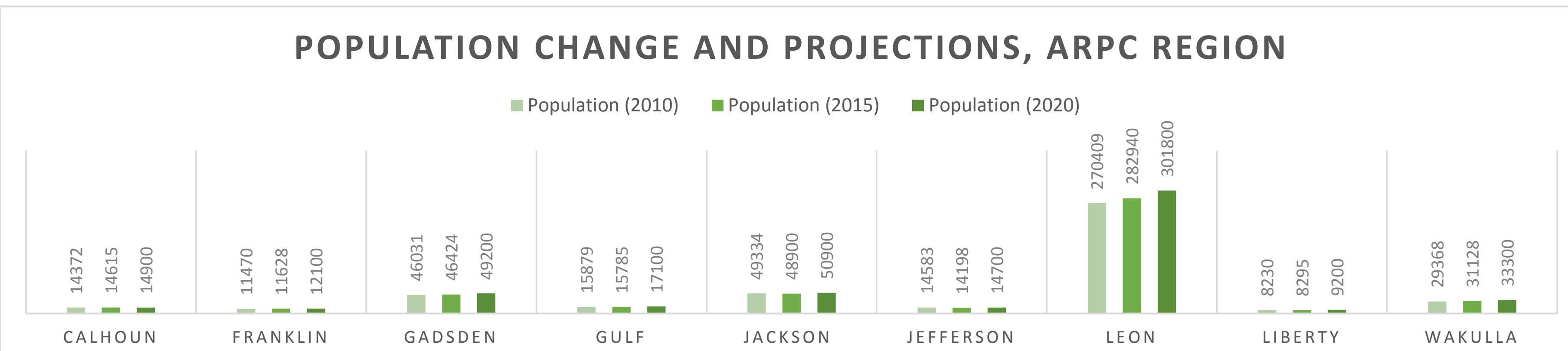
The Apalachee workforce begins at primary education delivered by 94 public schools and culminates in the output of Florida State University, Florida A&M University, and regional community and vocational colleges. The Region's population will grow, but not evenly across counties, which will in turn affect future working populations.

Florida school grades attempt to provide a simple metric to measure a district's ability to serve its students, ranging from A to F. In the Region, four of the nine counties declined by one letter grade between 2015 and 2016, while only Gadsden County improved – from a D to a C. Franklin, Gulf, Jefferson and Liberty remained stable, at a C, B, D, and B grade respectively.

To approximate student proficiency in STEM fields, this CEDS examined data for 8th grade math achievement on the FCAT by district. Of the nine districts, students in Gulf County achieved the highest mean scores (348), with 70% at level 3 or above (out of five total levels). Jefferson, Liberty, and Franklin students achieved a level 3 or higher at the lowest rates, with 3%, 13%, and 27% respectively.

In 2015-2016, white students in Leon County realized the highest high school graduation rates at 96.7%. Black students in Calhoun County attained the lowest high school graduation rates, at 61.5%. Inter-county variations were numerous, such as in Wakulla County, where 91.2% of black students graduated while only 87.1 of their white counterparts managed to obtain a high school diploma.

According to Census and Bureau of Economic and Business Research (BEBR) data, the population of the Apalachee Region grew by 3.1% to 473,913 between 2010 and 2015, and is expected to double that growth rate to 6.2% over the next five-year span. Population growth rates are expected to be highest in Liberty, Gulf, Wakulla, and Leon County, with Leon adding almost 30,000 new residents. REMI population modelling forecasts growth in age cohorts 25-34 and 60 and above. The largest declines by cohort are forecast for the 20-24 year old and 50-54 year old population. All others remain stable. This may indicate increasing demand for products and services directed toward older adults[3] and young families over the next five years.

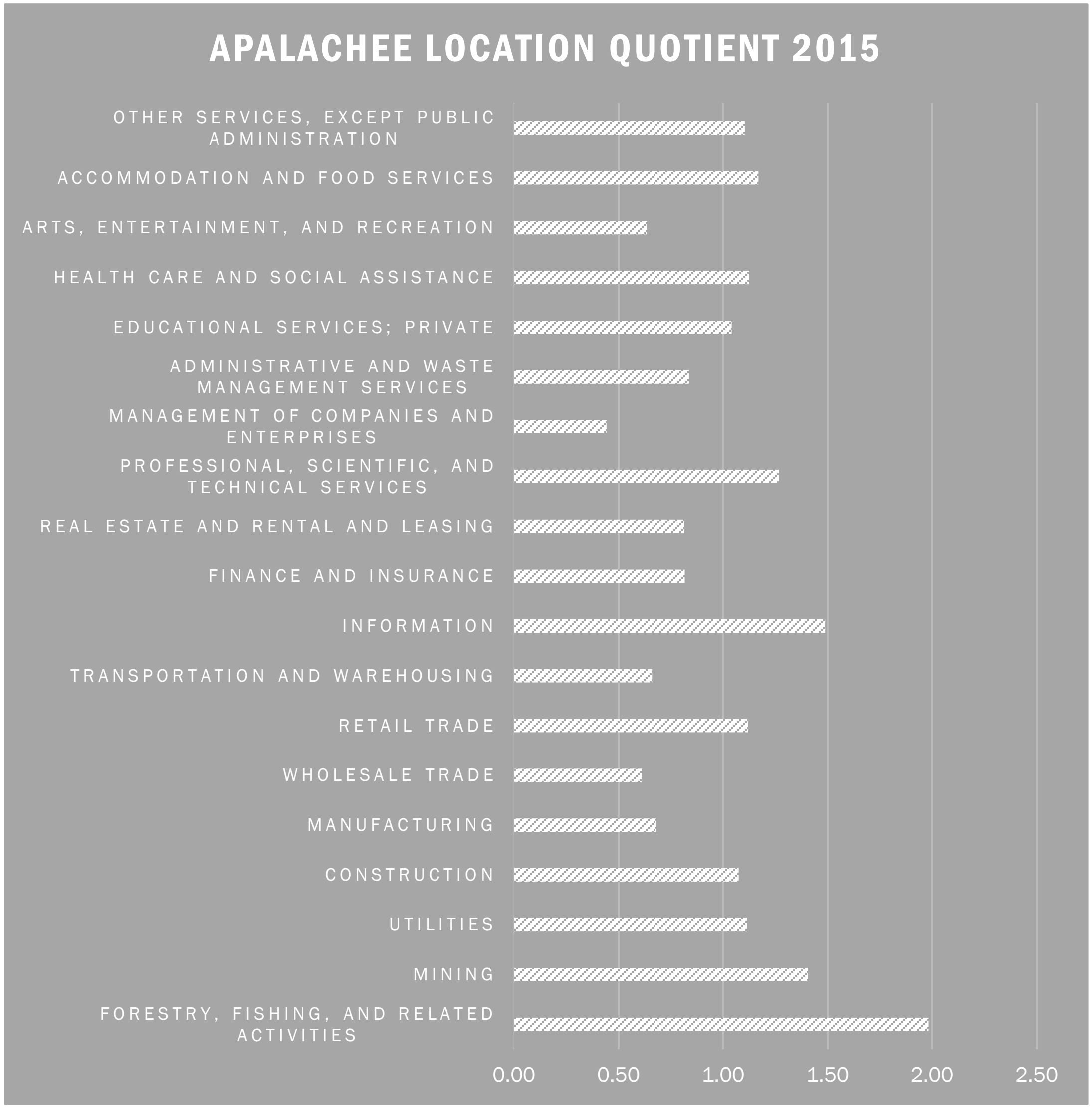


See Data Appendix for data sources and citations

[3] Planning for older adults has a wealth of resources in Florida: Dept. of Elder Affairs "[Communities for a Lifetime](#)"

Innovation and Economic Development

This section explores the vital signs of Apalachee industries. It also includes consideration of "innovation", which derives from the Stats America innovation index[4]. While these measures can rely on the interplay between many variables, Apalachee posts strengths in both agricultural and professional industry sectors, boasts two counties above the median of the Innovation Index, and has experienced regional growth in the Information and Retail Trade sectors that outpaces the nation. However, each of the nine counties demands net imports from the rest of the nation, and the growth in Construction and Professional sectors lags the nation.



Industry concentrations in the Apalachee Region are most robust in the following sectors:

- Forestry, Fishing and Related Activities (NAICS 11)
- Information (NAICS 51)
- Professional, Scientific and Technical Services (NAICS 54)
- Accommodation and Food Services (NAICS 72)

Forestry and Logging (NAICS 113) operations in Gadsden and Liberty County, Professional consulting activities that spin off from the major universities, Data Processing (NAICS 518) and Telecommunications (NAICS 517) in Tallahassee, and student and parent-oriented food services and drinking places in Tallahassee (NAICS 722) fuel local industry strengths. To provide strong

[4] On the StatsAmerica "Innovation Index": For this indexical assessment, human capital, economic dynamics, productivity and employment and economic well-being (as defined by sub-variables) each figure into an output number with no bound. For 2016, the median value was 84.3.

professional pathways to persons 16-25 employed in the Accommodation and Food Services as well as Retail sectors, Florida State University will be expanding its Dedman School of Hospitality[5].

2017 Apalachee Region exports to the rest of the nation exceeded $5.1 billion. Leon County exports exceeded all other counties by a factor of ten or more, with Jackson, Gadsden, Franklin and Gulf County sending between $200 and $350 million of goods and services elsewhere. Calhoun, Jefferson and Liberty each export around $80 million in value-adds. Offsetting this, the Region imported $7.5 billion in goods and services from the rest of the nation; nearly a two and one-half billion-dollar trade deficit. Franklin County arrives closest to breaking even, with a deficit-to-exports ratio of only 1.3%. Conversely, Jefferson County presents a ratio of 155.7% deficit-to-export.

According to Stats America, Leon and Wakulla counties far outperform the rest of the Region for innovation. The innovation index factors in 22 data points to enumerate the concept, from average high-tech employment share and average venture capital investment per $10,000 GDP to average unemployment rate and job growth to population ratio. The 2016 Leon and Wakulla County index values were 96.7 and 95.8, respectively (national median – 84.3) while Gulf and Gadsden counties scored the lowest, at 66.9 and 63.9 respectively. Notably, Leon and Wakulla also rank high on the Human Capital and Knowledge Creation Index. The sum of these index rankings suggest that Leon and Wakulla have the greatest potential for fortifying themselves as a combined knowledge and research hub.

[5] FSU Arena District website and SASAKI master plan: https://arenadistrict.fsu.edu/

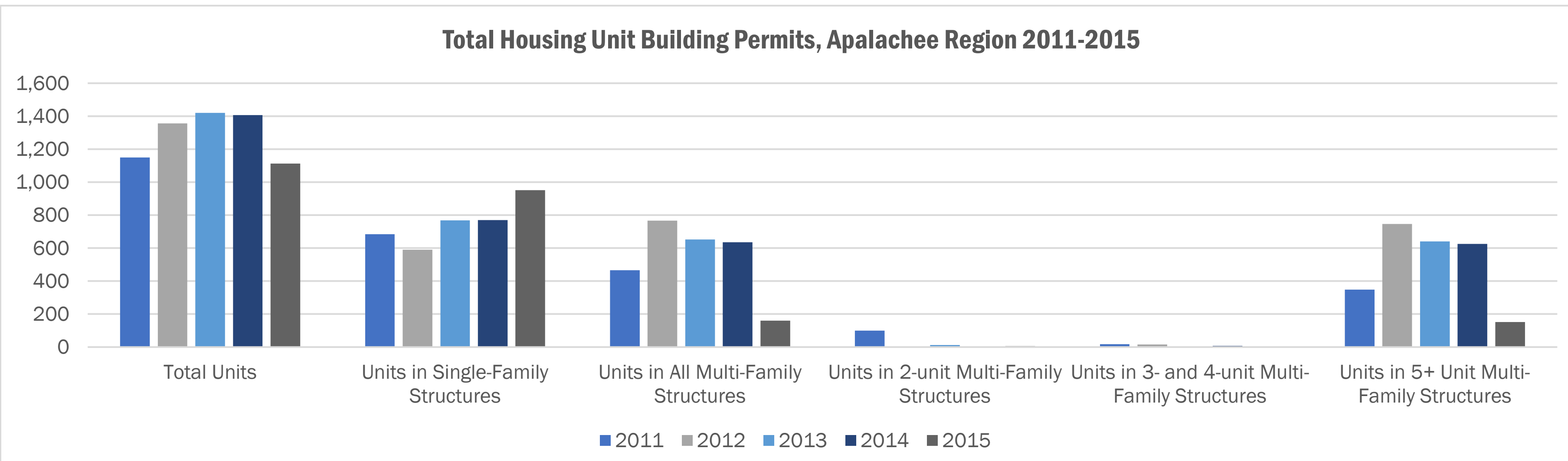
Infrastructure and Growth Leadership

The Apalachee Region continues to improve infrastructure – be it potable water, drainage, solid waste, sewer, roads, public spaces– and industrial/commerce park emplacement continues as a rural county priority. Housing rebounded after 2008, but new building starts could be cooling. Water is supplied via the Floridan Aquifer, sand-and-gravel aquifers, and surface waters; The Northwest Florida Water Management District forecasts a 14.2% increase in water demand by 2035, to 124.6 Million Gallons per Day.

The Northwest Florida Water Management District oversees water supply planning that affects residents and businesses alike. In its 2013 Water Supply Plan, the District predicts the greatest overall increases in consumption by 2035 will occur in Jackson, Leon, and Wakulla counties. It anticipates a 98% decline of Industrial/Commercial/Institutional use in Franklin County by 2035 and a 16% increase of the same use in Jackson County. Agricultural water use is expected to decline by 2035 in Leon County, and rise by nearly 45% in Jackson County during the same period.

Net primary employment commuting into the Region indicates that potential exists to attract new residents. Currently, the greatest number of in-commuting workers originate from the southeast, east, and west. Promoting low-impact, smaller nodes of development along US-27 in Jefferson and Leon, US-90 in Leon and Jefferson, US-90 in Jackson, and US-20 in Calhoun may promote in-migration of workers employed in the Region yet living outside.

Between 2011 and 2015, building permits for new housing rose and fell, peaking in 2014. While the number of single-family structures permitted was highest in 2015, new permits for multi-family structures dropped significantly. This was largely due to the decline in Leon County permits, which was likely in-step with the flurry of redevelopment that occurred along Gaines Street.



Business Climate and Competitiveness

The Apalachee Region and its nine counties individually continue their upward trajectory. Gross Domestic Product is projected to rise steadily between 2017 and 2020 for all counties, with the greatest increases forecast for Leon and Jackson counties. The annual average wage rate for Apalachee Region industries in 2015 spanned from $8,089 for Arts, Entertainment and Recreation to $69,484 for Utilities sector jobs. Information appears to be on a strong upward trajectory, rising from around $40,000 in 2010 to $57,000 in 2020. As mentioned in the previous CEDS, the re-structuring of Comprehensive Plan oversight at the state level resulted in increased local leverage over the land planning process, and consequently has promoted the ability of businesses to expand in the Region.

Of the 19 private NAICS industries surveyed, Mining and Administrative/Waste Management Services experienced declines in annual wage rates between 2010 and 2015. Utilities, Wholesale Trade, Information, and Accommodation/Food Services all benefited from 10% and above rises in annual wage rates between 2010 and 2015.

Gross Domestic Product is smallest in Liberty County, at $160 million in 2017. The largest is Leon County, at $13.8 billion. Calhoun and Jefferson hover around $200 million and Franklin County jumps to almost $400 million. This does not correlate to population size, as Franklin has fewer residents than Calhoun or Jefferson. This could indicate a strong latent opportunity to encourage new business startups in the three lowest GDP counties.

2017 Gross Domestic Product by County

Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
$204M	$395M	$1.104B	$429M	$1.076B	$227M	$13.8B	$160M	$486M

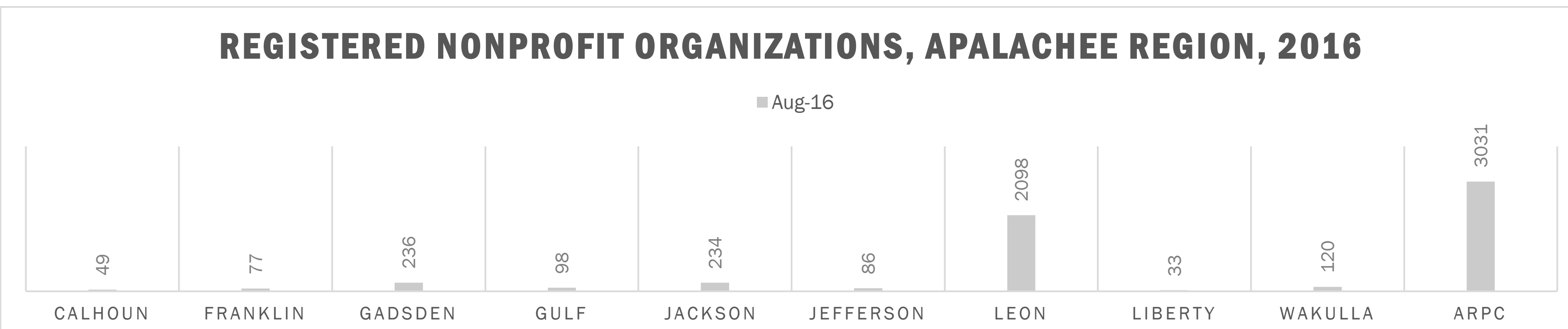
Civic and Governance Systems

The Apalachee Region is home to the state capital and many social institutions. Chambers of commerce, arts groups, civic organizations, community development entities, and others contribute to culture offerings and social safety nets. Quantitatively, this is borne out by numbers of registered non-profit organizations, which overwhelmingly concentrate in Leon County. The Institute for Nonprofit Innovation and Excellence found that the non-profit sector in Leon County alone accounts for $3.1 billion in revenue and $5.5 billion in total assets. By another measure, government expenditures per capita vary by $1,938 between the lowest and highest county, with an average of $945 spent by Apalachee county governments per person.

In 2015, Calhoun spent $562 per resident, while Franklin County spent $2,500. Some of this difference is attributable to the amount of spending on "business-type" activities, which vary greatly by county – over $8 Million in Franklin and Leon counties and none reported in Calhoun, Gadsden, and Jefferson.

In 2010 and 2014, Leon County and City of Tallahassee passed ordinances limiting individual campaign contributions. One study found that in the race for Leon County Commissioner, this reduced total amount raised by 34%[6]. City of Tallahassee created a new independent ethics board and a code of anti-corruption ethics[7]. These reforms may be replicable in the surrounding Apalachee Counties.

With 33 registered non-profits in August 2016, Liberty County may pose additional opportunities to grow to the size of Calhoun (with 49) or Jefferson (with 86). Gadsden County, despite registering lowest on the Stats America headline index, maintains 236 nonprofit organizations within its jurisdiction. This could indicate opportunities to expand nonprofit offerings into new modes of revenue generating activity. Non-profits such as Carrabelle Cares in Franklin and Panacea Waterfronts in Wakulla offer a potent way for citizen groups to augment the services and amenities provided by local government.



[6] Collins Institute at FSU: *Money in Politics Reforms in Florida: Initial Impacts and Comparison to other States*
[7] Code of Ethics: https://library.municode.com/FL/tallahassee/codes/code_of_ordinances?nodeId=PTICHLATA_SPACH_ETANRRCAFI
Ethics Board: https://talgov.com/main/ethics.aspx

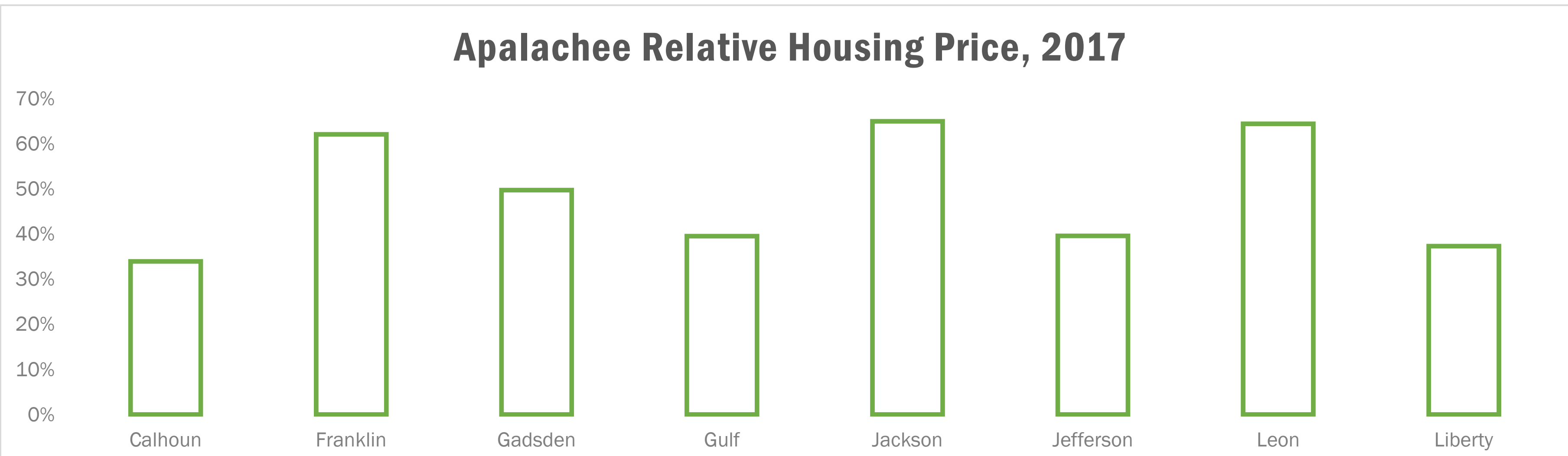
Quality of Life and Quality Places

With a strong commitment to creating and breathing life into a community vision, even small towns in the East Panhandle can create high quality places. Indeed, the Citizen's Institute on Rural Design, Transportation for America, Smart Growth America, and the Orton Family Foundation concentrate on the improvements rendered by creative placemaking. Apalachee physical amenities such as trails, waterways, stormwater parks, and cultural venues have expanded over the past ten years and per capita incomes have risen in all nine counties, yet poverty rates persist and have risen in Gadsden, Gulf, Jackson, Jefferson, and Wakulla. Housing prices are not as high as the national average.

Rails to trails projects support outdoor recreation in Liberty, Calhoun, Leon, and Wakulla counties. Opportunities to expand these projects and add new trail amenities abound under the SUN Trail program and Office of Greenways and Trails. Promoting and growing the Capital City to the Sea trail and its offshoots informs this CEDS.

Rates of people living in poverty have grown between 2010 and 2015 in Calhoun, Gadsden, Jackson, Jefferson, and Wakulla counties. Per capita income, paradoxically, has increased in all counties. This may mean that total wages paid are increasing but are held by a shrinking portion of the population.

The REMI relative housing price index factors in county-by-county disposable income and housing costs compared to the nation. As of 2017, relative housing prices in all counties sit below their 2005 levels. The most economical county in which to buy a house (compared to national average home price) was Calhoun County. The highest relative housing prices are found in Jackson County. As a Region, housing costs amount to 60% of the national relative price, down from 80% in 2005. They are predicted to linger at 60% of the national average until at least 2020.



SWOT Analysis

Strengths, weaknesses, opportunities, and threats (SWOT) is a tried and true technique for assessing the capacity and greater context of a firm. For this Strategy, ARPC and the steering committee examined assets, opportunities, limitations, and problematic trends that affect the Region.

The Apalachee CEDS defines SWOT as:

- A Strength or Weakness is *internal* to the Apalachee Region, and can be an asset or information about a characteristic of the region.
- An Opportunity or Threat is *external* to the Apalachee Region, understood as a trend, law, or other large phenomenon (e.g. climate, politics, super-regional events) which can affect the future performance of regional assets and characteristics.

Strengths

Robust higher education
Proactive Economic Development Organizations
Ambitious industrial development
High concentration of non-profits
Clean and ample water supply and natural spaces
Good old and new urban spaces
NAICS: Information, Retail, Transport & Warehousing, Accommodation (outpacing nation)

Weaknesses

All counties except Wakulla below state median income (< $47,507)
Low School Grades (All “B” or lower)
Low StatsAmerica scores (Economic Well Being and Innovation)
Lower capacity planning (e.g. land use, strategic, etc.) in some areas
Low to middle income housing stock aging or lacking
Agriculture products exported without value add
NAICS: Healthcare, Construction, Professional, Agriculture (outpaced by nation)

Opportunities

Adventure and Eco-Tourism
New local projects via state and national funding
Young population relative to state
Sharing Economy
Rise of Artificial Intelligence
Renewable Energy
Foreign Direct Investment

Threats

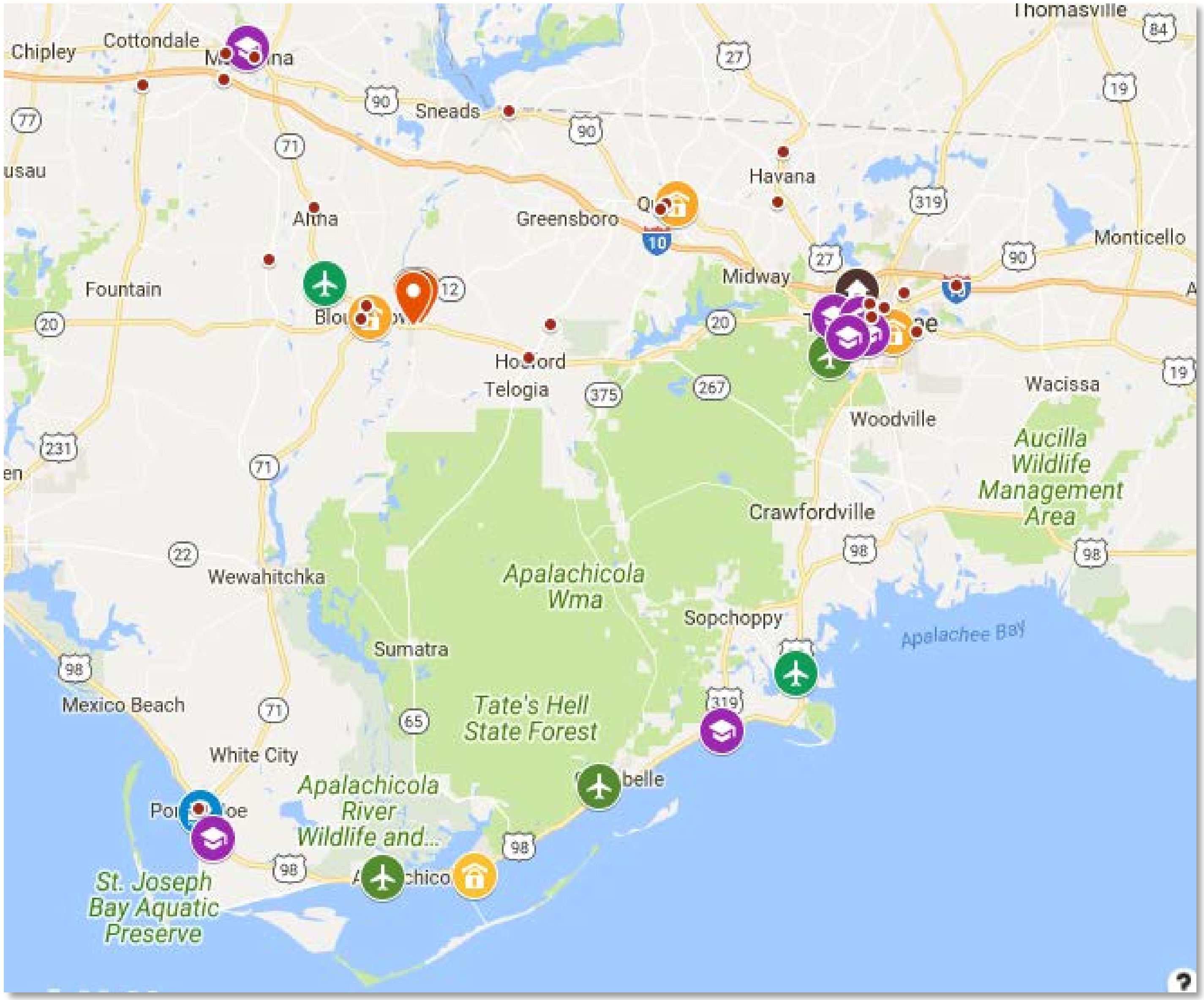
More severe disasters, more often (drought, flood, heat, cold)
Restrictive laws and policies
Off-shoring; Business recruitment by other states
Aging Florida population
Oil spills / environmental disasters
Low wage, service-based economy still growing
Secular Stagnation as new normal

For detailed SWOT entries, see the appendix on page 73.

Assets

Public Entities
ARPC
CareerSource Capital Region
CareerSource Chipola
AERO Tallahassee
Gadsden Chamber
Apalachicola NERR
Land and Buildings
Bristol Bank Building
DJJ Complex, Bristol
Doctor's Office, Bristol
Office Building, Bristol
Infrastructure
Carrabelle Airport
Apalachicola Airport
Port St. Joe Port
Higher Education
Gulf Coast State College
TCC
FSU
FAMU
FAMU-FSU Engineering
FSU Coastal Lab
Chipola College
Large Employers
Green Circle Bio Energy
Georgia Pacific
Gargiulo
TMH
Capital Region Healthcare
ACS Xerox
Walmart

Figure 2: Apalachee CEDS Asset Map



Strategic Direction

Apalachee Go Getters

An interconnected region that grows big through a cornucopia of small initiatives

Data, SWOT, and existing economic development plans all paint a broad picture. Through this section, the Apalachee CEDS sets a succinct, dynamic vision: The Apalachee Go Getters. The CEDS' three broadly applicable goals will support any of the Six Pillars or five goals of the NW FL Forward Strategy.

Florida Chamber and Northwest Florida Forward

The first two columns in the below table present goals from the Florida Chamber Foundation and Florida's Great Northwest. In keeping with the spirit of regional and state-level coordination and alignment, this plan focuses on the same areas and generates actions specific to the Apalachee Region. Rows in the table depict parallels between the pillars, NWFL Forward goals (called Strategies in their report), and CEDS goals.

<table>
<tr><th>Florida Chamber, Six Pillars</th><th>Northwest Florida Forward, Five Goals</th><th>Apalachee CEDS</th></tr>
<tr><td>Pillar 1: Talent Supply and Education</td><td>Goal 1: Connect the talent assets of northwest Florida to key industry clusters and ensure a dynamic and diverse workforce for new and growing businesses.</td><td rowspan="2">Enhance Interconnectivity and Collaboration</td></tr>
<tr><td>Pillar 2: Innovation and Economic Development</td><td>Goal 4: Foster robust entrepreneurship and innovation ecosystems to drive future economic growth.</td></tr>
<tr><td>Pillar 3: Infrastructure and Growth Leadership</td><td>Goal 3: Ensure that northwest Florida's economic infrastructure is state of the art and connects communities in every part of the Region.</td><td rowspan="2">Fortify and Animate Apalachee Strengths</td></tr>
<tr><td>Pillar 4: Business Climate and Competitiveness</td><td>Goal 2: Strengthen the Region's economy through targeted recruitment of new businesses and supporting existing business expansions.</td></tr>
<tr><td>Pillar 5: Civic and Governance Systems</td><td></td><td rowspan="2">Bring New Voices to the ED Drawing Board</td></tr>
<tr><td>Pillar 6: Quality of Life and Quality Places</td><td>Goal 5: Make Northwest Florida a place appealing to existing residents and visitors as well as to a new generation of talented and creative individuals and companies.</td></tr>
</table>

Action Plan 1: Objectives

This section consolidates the findings from the previous sections, conveying them into implementation steps that will guide ARPC Economic Development activities as the EDD in the Region over the next five years. Objectives were influenced by many instances of stakeholder outreach during 2017.

Codes and Short Hand:

Blue Text = Hazard Resilience Objective

Green Text = Economic Resilience Objective

ED – Economic Development

EM – Emergency Management

LG – Local Government

RPC – Regional Planning Council

TDC – Tourism Development Council

Objectives

The objectives articulate the goals by creating a series of measurable items that can be pursued directly or broken into tasks.

1. Enhance interconnectivity and collaboration

1.1. Create an inter-county Apalachee business resilience task force that sources best practices for industry resilience.

1.2. Work to increase employee and business resilience to Hurricanes, Flooding, Severe Storms, and Wildfires through Local Mitigation Strategy updates and program assistance to support individual and group planning, weatherization, preparedness, continuity of operation, and mitigation.

1.3. Explore the twenty-four disaster mitigation funding options presented in the State Enhanced Hazard Mitigation Plan (SEHMP) for new applications in Apalachee Counties.

1.4. Develop unified and responsive county and regional applications for Triumph Gulf Coast, Inc. and Job Growth Grant Fund on a yearly basis.

1.5. Promote Apalachee outdoor recreation through new, lightweight social media campaigns and physical signage efforts.

1.6. Use the DEP "trail town" concept to reinforce Apalachee tourism economies, including new and enhanced connections between feeder trails and the Capital City to Sea Trail and the proposed Chattahoochee to Bristol Trail and Florida National Scenic Trail linkage.

1.7. Launch a County Planning Summit similar to the *Sustainable You* conference wherein planning best practices are showcased for Apalachee Region.

1.8. Support expanded small business and entrepreneur support through partnerships between Small Business Development Center Gretna and Tallahassee, Incubators and underserved counties.

1.9. Explore and if feasible, launch an inter-county Economic Development Special District with financing to undertake infrastructure and amenity projects.

1.10. Explore and if feasible, launch a new inter-county amenity financing mechanism, such as a Round Robbin program wherein contributors receive lump sum distributions in turns.

1.11. Connect arts groups to placemaking outfits (e.g. MainStreet, CRA, Waterfronts) throughout the Region.

1.12. Promote Arts Group-School Board interactions to advance STEAM careers as a cutting-edge workforce development tool.

1.13. Promote the benefits of satellite business offices in rural Apalachee.

2. Fortify and animate Apalachee strengths

2.1 Explore industry-decline preparedness plans that assess infrastructure, real estate, talent, and amenities for local-government assisted market pivots following macroeconomic shifts.

2.2 Work to create a strong pipeline between High Magnetic Field Laboratory research/experiments and local business installation.

2.3 Assist efforts to diversify rural economies by advancing site readiness and promoting real estate re-use opportunities toward uses in professional/technical offices, warehousing, light/clean tech manufacturing, cloud data storage and agricultural technology.

2.4 Develop I-10 interchange plans for all existing exits that identify available parcels, land use and zoning, and push the limits of interchange planning and development by creating new amenities.

2.5 Emphasize environmental entrepreneurship by supporting commercialization and promoting new technologies in North Florida aquaculture and agriculture.

2.6 Emphasize green entrepreneurship by supporting proof of concept, commercialization, and growth in North Florida renewable energy.

2.7 Through the Dedman School of Hospitality, develop a program to promote improved accommodation, food service and retail employee benefits throughout the Region.

2.8 Through the Jim Moran Institute for Global Entrepreneurship, promote the development of the entrepreneur ecosystem throughout the Apalachee Region.

2.9 Connect entrepreneurs to grants, competitions, equity matching, angel investing, incentives, and other funding.

2.10 Improve connectivity within the Regional food system to increase opportunities for direct-to-consumer relationships and value-added industries.

2.11 Support expanded workforce training efforts through partnerships between Chipola College, CareerSource Florida Network, Lively Technical Institute, Tallahassee Community College and underserved counties.

2.12 Explore new frontiers in low-impact, high-return forest uses including boutique recreation tourism and innovative silviculture management activities.

2.13 Progress in the development of the Port at Port St. Joe and associated Freight and Logistics Zone and I-10 Logistics and Manufacturing Corridor infrastructure including new Apalachicola Northern Railroad spurs, Intermodal Logistics Sites, and road enhancements along US 98, SR 20, SR 12, and at the I-10 interchange.

2.14 Promote economic growth at regional Strategic Sites (SSI) including Jackson County Gulf Power Certified Sites at Marianna Airport Commerce Park and Marianna/Jackson County Distribution and Construction Services Park, as well as the Florida-Alabama Mega Site near Campbellton.

2.15 Enhance aviation supporting freight and tourism clusters by taking steps to increase traffic at Apalachee airports including Tallahassee, Carrabelle, Apalachicola, Marianna, Calhoun County and Wakulla County.

3. Bring new voices to the ED drawing board

3.1 Meet the needs of a growing 55 and older community by planning for aging in place, older-adult facing business development, and more resilient assisted living and senior center facilities.

3.2 Create a mechanism for fostering bootstrap entrepreneurship in the nine-county area, such as via a “mobile incubator”.

3.3 Promote benefits of investing in startups to local governments and encourage new investment in local entrepreneurship resources.

3.4 Enhance understanding of the urban/rural divide in terms of land use planning needs and requirements, grant writing assistance, and Enterprise Florida assistance.

3.5 Facilitate Art Group-Private Partnerships (APPs) between art galleries and private businesses including materials, space, logistics, branding and other shared initiatives.

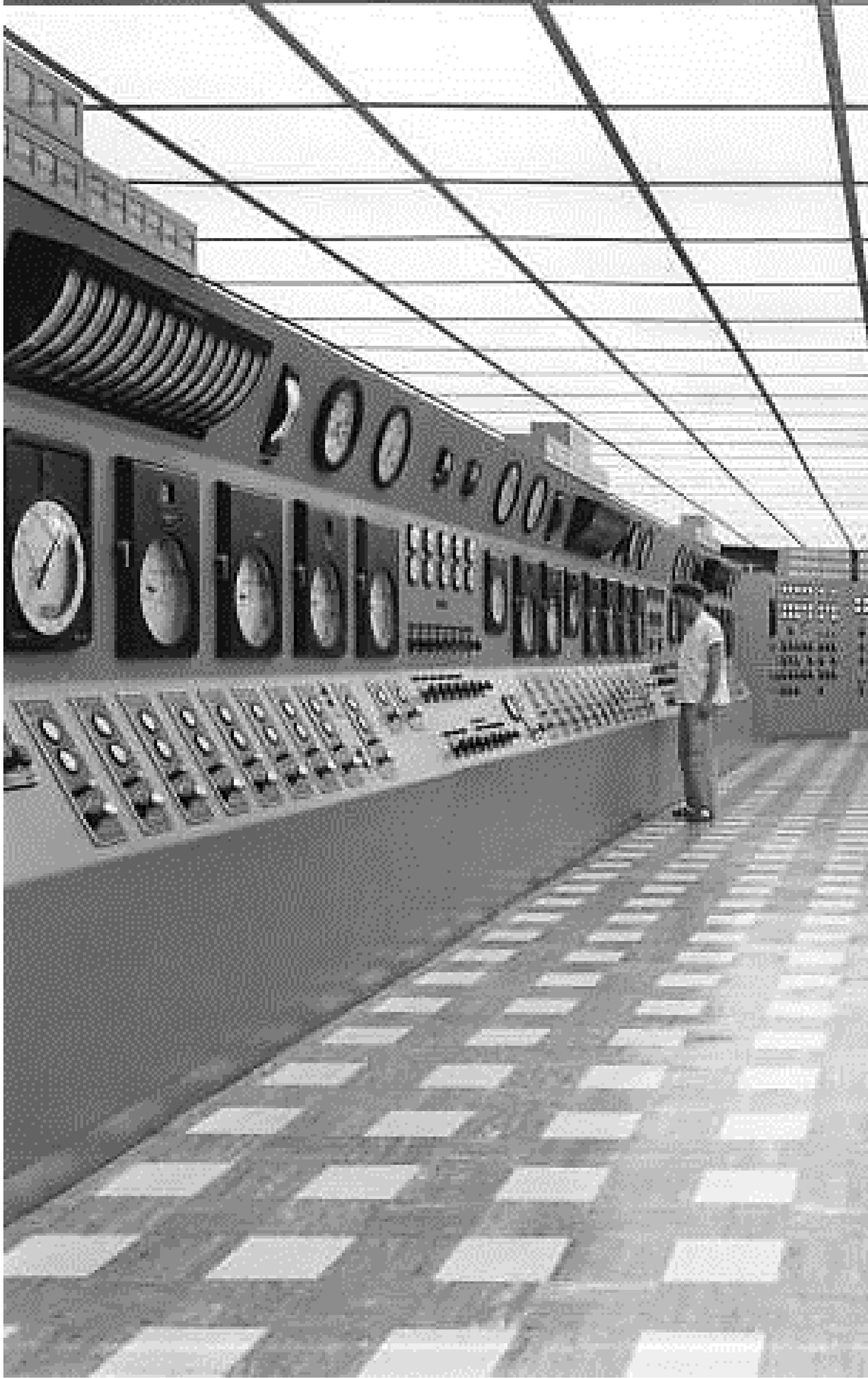
3.6 Promote a wide variety of entrepreneurship through new and creative finance mechanisms.

3.7 Increase income generating and talent acquisition opportunities for high school youth through externships and career counselor-business liaisons.

Action Plan 2:
Evaluation Framework

The Apalachee EDD will use the 2018 CEDS update to establish a clear path for checking on regional economic development progress.

The section provides information about metrics and monitoring techniques, as well as tactic-level approaches to achieving the objectives from the preceding section.



Metrics and Monitoring Techniques will inform the yearly update of the 2018-2022 Strategy. The baseline for metrics can be explored in the Data Appendix section of this Strategy.

Metrics

- **Number (#) of ED Projects linkable to CEDS**
- **Number (#) of Planning Projects linkable to CEDS**
- **Increase in jobs / county total employment**[8]
- **Increase in "x"** (e.g. Placemaking improvements, Interactions, Technical Assistance, High School Achievement, Educational Programs, Revolving Loan Funds, Target Industry Business Startups and Relocations, Non-profit Startups, New Infrastructure Projects)
- **Decrease in "x"** (e.g. Unemployment, Unoccupied Buildings, High Priority Capital Improvements Projects)

Monitoring Techniques

- Semi-annual (every 6 months) check in with steering committee on all new activities.
- CEDS survey with quantitative metrics sent to steering committee / county contact:
  - https://www.surveymonkey.com/r/GY8G9XR
- EDA Semi Annual Reports from ARPC Staff.

[8] Bureau of Labor Statistics, county employment news releases: https://www.bls.gov/regions/southeast/news-release/countyemploymentandwages_florida.htm

Tactics	Groups involved	Timeframe	Potential Resources	Evaluation Metric
Meet objective 1.1: - Survey local government-chamber of commerce interactions for resilience. - Create gap analysis for business-local government resilience planning. - Generate lists, recruit, plan when gaps exist.	RPCs, LGs, EM Groups	Near Term (Rank 15th)	Chamber of Commerce Funding Community Resiliency Initiative Funding EM Federal Funding	Project report linkable to CEDS Increase in business resilience plans
Meet objective 1.2: - Review LMS for employee and business mitigation strategies - Convene strategy discussion between business and local gov'ts where applicable. - Increase language about business resilience and Continuity of Operation in LMS.	RPCs, LGs, EM Groups	Mid Term (Rank 21st)	Chamber of Commerce Funding Community Resiliency Initiative Funding EM Federal Funding	Project report linkable to CEDS Increase in business mention in LMS
Meet objective 1.3: - Survey Apalachee LGs for latest mitigation project funding sources. - Analyze underutilized funds per SEHMP. - Transmit opportunities to LGs and apply for new funding.	RPCs, LGs, EM Groups	Mid Term (Rank 22nd)	Chamber of Commerce Funding Community Resiliency Initiative Funding EM Federal Funding	Project report linkable to CEDS
Meet objective 1.4: - Assemble campaigns to coordinate Triumph Gulf Coast and JGGF funding ideas. - Develop calendar of meetings for proposal development and submission. - Make process well-known and semi-formal between school board, LGs and key stakeholders.	LGs, ED Groups	Near Term (rank 9th)	Opportunity Florida / NFEDP Capacity	Increase in unified county grant proposals
Meet objective 1.5: - Pitch and develop prospectus through Riverway South and regional TDCs. - Inventory outdoor recreation promotional activities. - Develop hashtags, Facebook boost campaigns, SEO campaigns, Instagram campaigns, SnapChat campaigns, and other gamification that promotes Apalachee Outdoors. - Work with FDOT, District, and County Transportation to improve road signage indicating outdoor recreation resources.	Riverway South, TDCs, Information Businesses, FDEP, LGs, Main Streets, FDOT, Apalachicola River Keepers	Mid Term (Rank 23rd)	Chamber of Commerce Capacity or Funding Multi-TDC funding Florida Greenways and Trails foundation capacity	Project report linkable to CEDS Increase in TDC tax revenue

Meet objective 1.6: - Engage Florida Office of Greenways and Trails, Florida Greenways and Trail Foundation, and Local Governments to explore trail strategy. - Develop Trail Town plans with Apalachee local governments - Seek SUN Trail financing for Apalachee Region trails and supplement with CRA-type activity to develop areas around trail heads.	DEP, FDOT, TDCs, ED groups, LGs, RPC, RiverWay South, Apalachicola Riverkeepers		SUN Trail FDOT Fund DEP FRDAP Program Florida National Scenic Trail, State and National Parks	Project report linkable to CEDS Increase in TDC tax by county.
Meet objective 1.7: - Coordinate with Tallahassee-Leon County about planning summit topics. - Meeting logistics planning. - Pilot summit.	LGs, Planning Departments, MPO, RPC	Near Term (Rank 16th)	DEO TA Grant Funding Multi-County Commission funding	Project report linkable to CEDS Decrease in vehicle miles traveled in core urban retail areas.
Meet objective 1.8: - Understand full deck of entrepreneur and small business services available, by county. - Coordinate activities with objectives 2.8, 2.9, 3.2, 3.3 and 3.6. - Create maps and information detailing these services. - Provide gap analysis and pitch new feasible extensions.	RPCs, LGs, SBDC, Main Streets	Near to Mid Term	Utilize GoToMeeting and Google Drive or Slack to enhance exchanges / County appropriation	Project report linkable to CEDS Increase in new business startups.
Meet objective 1.9: - Review ED special districts with Jack Gaskins at DEO. - Pull takeaways from successes and make "how to" for intergovernmental ED special district. - Pitch among LGs. - Pilot ED special district and monitor progress.	ED Groups, LGs	Longer Term (Rank 30th)	Special District self-financing / Industrial Revenue Bonds / TIF / Enterprise FL Incentives	Project report linkable to CEDS Increase in ED revenues
Meet objective 1.10: - Review international development literature and coordinate with area finance for small scale/rural finance mechanism ideas. - Pitch to Chambers of Commerce, corporations, LGs, for comment and revision. - Develop pilot program. - Execute funding mechanism and monitor.	LGs, Credit Union, CDCs, ED Groups	Near Term (Rank 10th)	County budget administration (general fund) / Department of Financial Services	Project report linkable to CEDS Increase in LG revenue

Meet objective 1.11: - Inventory Arts Groups by county by type. - Inventory Placemaking outfits by county by type. - Convene mixer/social for Arts Groups and Placemaking groups. - Develop collaboration agreements between synergistic groups.	Arts Groups, ED Groups, Placemaking Groups	Near Term (Rank 12th)	COCA grants DEO TA Grant Funding Crowdsource	Project report linkable to CEDS Increase in non-profits registered by county
Meet objective 1.12 - Develop ideas for STEAM support activities delivered by Arts Groups to School District. - Convene pitch meeting to school district. - If successful, flesh out project plans and logistics. - Run pilot and evaluate impact on students and arts programs.	Art Groups, School Districts, RPCs	Mid Term (Rank 19th)	School District Funding PTA funding Crowdsource funding Department of Education grant	Project report linkable to CEDS Increase in education/workforce programs
Meet objective 1.13: - Poll businesses about barriers to opening offices in rural Apalachee. - Address barriers through grants and infrastructure. - Develop marketing campaign to pull Tallahassee entrepreneurs and large businesses into 8-county region.	Entrepreneurs, ED Groups, RPCs, Businesses, LGs	Immediate (Rank 3rd)	USDA Rural Facilities Funding DEO RIF grant Capital Improvements Element EDA funding	Project report linkable to CEDS Increase in business registrations Increased County Sales Tax
Meet objective 2.1: - Assess other nationwide planning efforts for local economic pivots following industry downturns. - Generate pilot-plan Scope of Work with interested City or County. - Assemble pilot plan and create break-away templates for other local governments.	RPC's, LGs, ED Groups	Longer Term (Rank 27th)	DEO TA Grant EDA Planning Funding	Project report linkable to CEDS
Meet objective 2.2: - Coordinate activities between Innovation Park board, commissioners, and OEV. - Connect FSU MagLab to community through communication channels such as website showing commercializable technologies. - Promote tech-industrial startups collocating in Innovation Park to entrepreneurs in nine-county area.	OEV, ED Groups, Innovation Park, LGs, FSU FAMU	Mid Term (Rank 20th) *W/special mention by Opportunity FL	FSU funding OEV capacity EDA funding	Increase in new business startups Increase in employment
Meet objective 2.3: - Promote and expand Strategic Sites Inventory in all 8 rural counties. - With ED Groups, work to develop an "Overcoming Barriers to Options" guide for Apalachee region. - Provide expanded target industry studies based on workforce and real estate availability.	Site Selectors, ED Groups, LGs	Immediate (Rank: 1st)	DEO TA Grant TRIUMH Funding JGGF Funding GCDC Capacity	Decrease in vacant existing commercial real estate Increase in new commercial site availability and building permits

- Write grants and obtain funding to online new real estate and sites. - Market and attract target companies.				
Meet objective 2.4: - Inventory I-10 exits for real estate, collector roads, zoning and utilities at all exits. - Create strategic 1-pager to advance at least 1 interchange. - Work with architecture firm or FAMU architecture to realize conceptual plan for at least 1 interchange. - Where feasible, integrate access to trail towns, parks, and natural resources in accordance with objective 1.6.	RPCs, Site Selectors, ED Groups, LGs, State Planning Agency, Architecture group	Near Term (Rank 7th)	DEO TA Grant Funding DEO Technical Assistance	Project report linkable to CEDS Increase in infrastructure near exits and new building permits
Meet objective 2.5: - Collaborate with Wakulla Environmental Institute, DOMI and the Jim Moran Institute to find key niches for all three in ag-entrepreneurship. - Develop prospectus for new offerings and market (like DOMI I/O program in coding)	TCC, FSU, ED Groups, RPC	Near Term (Rank 13th)	FSU funding EDA funding	Increase in new business registrations Project report linkable to CEDS
Meet objective 2.6: - Inventory efforts in renewables from startups in the Region. - Work with Sustainable Tallahassee-Leon County and Public works to explore opportunities for green energy startups. - Concert efforts from regional ED groups to support green entrepreneurs through access to capital, space, and marketing.	ED Groups, RPCs, Universities	Mid Term (Rank 24th)	Gulf / Duke / FPL grant EDA funding FSU DURP Capacity	Increase in new business registrations Project report linkable to CEDS
Meet objective 2.7: - Develop proposal regarding best practices in labor and compensation. - Survey Accommodation/Food Service businesses region-wide on labor practices and benefits. - Share results and promote high achievers.	FSU, RPCs, Accommodation Businesses	Longer Term (Rank 31st)	FSU DURP Capacity DEO TA Grant	Project report linkable to CEDS Increase in Average Annual Wages per job in target sectors
Meet objective 2.8: - Coordinate activities with objectives 1.8, 2.9, 3.2, 3.3 and 3.6. - Create outline for program and pitch to Jim Moran Institute. - Develop pilot, costs, and identify established entrepreneurs to lead project.	FSU, RPCs, ED Groups	Near Term (Rank 17th)	DOMI capacity TCC capacity EDA Funding	Increase in new business registrations Project report linkable to CEDS

Meet objective 2.9: - Coordinate activities with 1.8, 2.8, 3.2, 3.3 and 3.6. - Cover "clearinghouse" idea with DOMI, Jim Moran Institute and OEV. - With students or other group, build simple, easily updatable, crowd-sourced funding and resource website.	ED Groups, FSU, OEV	Immediate (Rank 4th)	LG appropriation through ED website funding FSU CS Capacity	Project report linkable to CEDS Increase in new business registrations
Meet objective 2.10: - Revisit 2015 Food For Us report from Leon County. Sustainable Community Summit and update on progress - Inventory local actors playing in the enhanced food system field (e.g. CSA, farm to market, etc.). - Promote Revolving Loan Fund loans to Food businesses.	LGs, RPC, Agriculture, Food Logistics, Food Manufacture Businesses	Longer Term (Rank 28th)	Publix / New Leaf / Whole Foods capacity and funding DEO TA Grant FSU DURP Capacity	Project report linkable to CEDS Increase in Revolving Loan Fund activity targeting local food activity
Meet objective 2.11: - Coordinate Opportunity FL and Community Colleges around emerging workforce development opportunities from WIOA and peer states such as Louisiana FastStart - Develop grant proposals that will extend the impact of workforce training, namely through Florida Job Growth Grant Fund	Opportunity FL, CareerSource FL, Community Colleges	Mid Term (Rank 18th)	WIOA funding CareerSource Tech Assistance JGGF Grant	Increased certification and Associate's degrees Increased grant funding to region from FJGGF
Meet objective 2.12: - Continue building on momentum generated by C2B planning effort. - Combine Liberty County and Gadsden trail development efforts through boutique tourism site selection efforts. - Research and develop new forest management proposals that can make holdings in Apalachicola Forest productive, contributing to education and public-sector activities.	LGs, RPCs, ED Groups	Immediate (Rank 5th)	US Forestry Service Grant EDA Grant Major Silviculture Employer Capacity	Increase in new business registrations Project report linkable to CEDS
Meet objective 2.13: - Collaborate among GCDC, PSJ Port Authority, Liberty County Chamber and Franklin County to prioritize steps, provide technical assistance and pursue funding.	ED Groups, RPC, LGs, Florida's Great NW, JAXUSA, Opportunity FL, NFEDP	Near Term (Rank 11th)	ILC FDOT Funding INFRA USDOT Funding RIF Funding Triumph Funding	Project report linkable to CEDS New infrastructure completions
Meet objective 2.14 - Coordinate with LL+D, Enterprise FL, GCDC, Chipola College, and interested LGs to continually assess infrastructure and workforce needs driving new leads. - Enhance pathways between state assistance sources and Site and Park coordinators	GCDC, Chipola College, LGs, LL+D, Enterprise FL, RPCs	Longer Term (Rank 33rd)	Job Growth Grant Fund Rural Infrastructure Fund EDA Public Works	Project report linkable to CEDS Increase in level of Employment Increase in average wages per job

Meet objective 2.15 - Survey existing airport master plans and assess feasibility of expansion priorities. - Convene regional airport development planning meetings to discuss existing conditions. - Take steps to prepare airport sites for business cluster enhancement: marketing; incentives; infrastructure; school partnerships.	Airports, LGs, RPCs, ED Groups	Longer Term (Rank 29th)	Job Growth Grant Fund Regional Rural Development Grants FDOT funding EDA Public Works USDA Community Facilities	Project report linkable to CEDS Increase in average wages per job
Meet objective 3.1: - Conduct review of aging in place, medical district, senior-oriented business development, and community facilities resilience plans and push to constituents. - Coordinate with LGs, EM Groups, Dept. of Elder Affairs, and ED Groups to brainstorm new older-adult facing planning initiatives. - Create pilot plans for aging in place districts, business development, and older adult facilities disaster resilience.	Social Service Businesses, EM Groups, ED Groups, LGs, Dept. of Elder Affairs	Near Term (Rank 14th)	FEMA Funding EDA Funding DEO TA Funding	Project report linkable to CEDS Increase in new business startups
Meet objective 3.2: - Assess synergy with objectives 1.8, 2.8, 2.9, 3.3 and 3.6. - Pitch new concept to OEV, DOMI, City of Tallahassee, Rural counties. - If favorable, develop pilot plan for setup and operation.	ED Groups, FSU, RPC, LGs	Immediate (Rank: 2nd)	Enterprise FL Capacity Louisiana Business and Technology Center capacity EDA Funding	Project report linkable to CEDS Increase in total employment
Meet objective 3.3: - Assess synergy with objectives 1.8, 2.8, 2.9, 3.2 and 3.6. - Coordinate with BOCC and boards to determine new funding opportunities that mimic and/or expand the DOMI model. - Pilot 2nd model.	ED Groups, LGs	Near Term (Rank 9th)	Local Government Incentives Funding EDA RLF Fund to cities FSU Moran Capacity	Project report linkable to CEDS
Meet objective 3.4: - Convene charrette about rural land use and grants needs and opportunities. - Apply take-aways to ED development plans. - Make concerted pitch to Enterprise FL.	ED Groups, RPCs, LGs	Near Term (Rank 6th)	Enterprise FL Capacity DEO Technical Assistance and Grants	Project report linkable to CEDS Increase in total employment

Meet objective 3.5: - Work with COCA Tallahassee and other groups to assemble survey of private employers re: willingness to enter new ventures with arts groups. - Pitch new “Artrepreneur” financing ideas to relevant arts and philanthropic groups as impact investing opportunity.	Art Groups, ED Groups, RPCs, Businesses	Mid to Long Term (Rank 26th)	Business capacity and funding CRA funding Crowdsource funding	Project report linkable to CEDS Increase in sales tax receipts
Meet objective 3.6: - Survey best practices in entrepreneur capital raising. - Develop RLF expansion strategy. - Expand RLF and associated funding. - Coordinate activities with Objectives 1.8, 2.8, 2.9, 3.2 & 3.3.	RPCs, ED Groups, Private Lenders, LGs	Immediate to Near Term	Local Government Funding Private Lenders EDA Funding	Project report linkable to CEDS Increase in New Business Starts
Meet objective 3.7: - Develop prospectus for single pilot with CareerSource Capital Region and TCC. - Pitch to School board. - Pilot new externship program and assess success.	School Districts, ED Groups, RPCs	Mid Term (Rank 25th)	WIOA capacity School board funding EDA funding	Increase in average annual wages per job Increase in total employment

Resilience

The Apalachee economy participates within a larger network of social, environmental, and built entities that are susceptible to natural and man-made disaster. Smart planning of any stripe therefore incorporates resilience, or the ability to withstand and recover from incidents. The EDA defines economic resilience through a two-pronged approach:

- Steady-state initiatives – *longer-term efforts that seek to bolster a community's ability to withstand or prevent a shock.*
- Responsive initiatives – *establishing capabilities that allow an organization/region to be responsive to the region's recovery needs following an incident.*

At the individual level, business resilience may include savings, insurance, capital upgrades, and product/service diversification strategies. At the community level, resilience can be understood as sectoral diversification, regulatory reform[9], entrepreneur support, and preparedness-response-recovery-mitigation planning policies. Uniting this two-pronged approach, businesses are encouraged to support resilient communities and embrace their place within an inter-dependent network[10].

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[9] OECD, *Regulatory Reform for Recovery*. 2008.
[10] Unruh, Gregory. "Strategies for Business Resilience" MIT Sloan Management Review, September 20, 2016.
Also: Unruh, Gregory. "The Surprising Secret of Business Resilience" MIT Sloan Management Review, August 16, 2016.

State Hazard Assessment and Funding Responses

The State Enhanced Hazard Mitigation Plan (SEHMP) provides the departure point for discussions and improvements to Apalachee resilience[11]. Section 3 of the SEHMP assesses hazard risks by county. The four most common Apalachee high risks are **Hurricanes**, **Flooding**, **Severe Storms** and **Wildfires**. **Tornadoes**, **Drought**, and **Erosion** also pose substantial risk. County-by-county hazards are presented in the below table.

Table 1: Apalachee Region Hazard Risks, from Florida State Enhanced Hazard Mitigation Plan

County	FL	DF	HU	TO	SS	WF	DR	EH	WS	FR	ER	SH	LS	SM	TR	TC	MM
Calhoun	L	L	H	H	H	H		M	M	M	M	L	L	L	L	L	L
Franklin	H	L	H		MH	MH	M		M		MH		MH	L	L	MH	
Gadsden	MH	L	H	M	H	MH	MH	L	M	H	H	L	L	L			
Gulf	H	L	H	M	MH	MH	MH				H	L	H	L	M	MH	
Jackson	MH		H	H	M	M	M				MH	L	MH		L	L	
Jefferson	H	L	MH	MH	M	H	MH		MH	MH	M	L	M	L	L	H	
Leon	M	L	H	M	M	H	M		L			L		L	L	M	
Liberty	H		H	M	H	M	M				M	L		L			
Wakulla	H	L	H	M		M	L		L		L	M		L			

Degree of Risk

L – Low **M** – Medium **MH** – Medium/High **H** – High

Hazard Type

DF – Dam Failure
DR – Drought
EH – Extreme Heat
ER – Erosion
FL – Flooding
FR – Freezes
HU – Hurricanes
LS – Landslides
MM – Mass Migration
SH – Sinkholes
SM – Seismic Events
SS – Severe Storms
TC – Technological Events
TO – Tornadoes
TR – Terrorism
WF – Wildfires
WS – Winter Storms

[11] State Enhanced Hazard Mitigation Plan: http://www.floridadisaster.org/Mitigation/State/Index.htm

Goal 4, Objective 4.3 of the SEHMP states: “Seek mitigation opportunities that reduce economic losses and promote responsible economic growth.” To meet this objective, the SEHMP identifies six federal, seven state, and 11 local funding options[12].

Table 2: Hazard Mitigation Funding Sources

Federal Funding Programs	Hazard Mitigation Grant Program
	Flood Mitigation Assistance Program
	Severe Repetitive Loss Program
	Repetitive Flood Claims Program
	Pre-Disaster Mitigation Grant Program
	Emergency Management Performance Grant
State Funding Programs	Florida Hurricane Catastrophe Fund
	Residential Construction Mitigation Program
	Florida Communities Trust Fund
	Coastal Partnership Initiative Grant
	Florida Small Cities Community Development Block Grant
	Community Development Block Grant Disaster Recovery Initiative
	The Weatherization Assistance Program

[12] SEHMP, Funding and Projects: http://www.floridadisaster.org/Mitigation/State/documents/2013stateplan/Section%205%20Funding%20and%20Projects%20FINAL.pdf

Local Funding Programs	Half Cent Sales Tax
	Ad Valorem Tax
	Storm water Tax Assessment
	Housing and Rehabilitation Fund
	In-Kind Services
	Impact Fees
	Tourist Tax Local Option
	Revenue Bonds
	Permit Fees
	State Revenue Sharing
	Property-Assessed Clean Energy (PACE)

Resilience through the Regional Planning Council

NADO's *Planning for a More Resilient Future* guidebook finds ten ways that regional organizations can contribute to resilience. Many of the roles overlap with the value add that regional groups provide in other contexts. The ten ways are:

1. As regional leaders that cross governmental and functional boundaries
2. As experienced practitioners with strong networks and deep knowledge of federal funding opportunities
3. As coordinators and managers of external funding streams
4. As planners
5. As sources of technical expertise

6. As communicators
7. As networkers
8. As conveners
9. As a means of reaching out to vulnerable populations
10. As additional staff capacity

Apalachee Regional Planning Council currently offers experienced emergency management practitioners, planners, technical expertise, communications, conveners, and enhanced staff capacity to the nine counties.

Other Florida RPCs have gone to additional lengths to integrate resilience into their CEDS. South Florida Regional Planning Council identified the following Florida-specific objectives to promote resilience:

- **Cross-cutting strategy** *Enhance South Florida's resiliency to respond, maintain continuity of business operations, recover and adapt to future disruptions to the Region's economy*[13].
    - Increase the numbers of workers and businesspeople prepared for hurricanes.
    - Reduce property insurance costs through resilient homes and infrastructure.
    - Develop land use policies to address rising sea levels.

Economic Resilience

In addition to a community's resilience to natural disasters, economic downturns have been found to affect regions differently. Those communities with greater diversity of industries and workforce often rebound more quickly and robustly than communities built around a single industry. This section reviews economic diversity rankings relevant to Apalachee and explores tools to enhance diversification.

Wallet Hub publishes a list of cities with the most and least diversified economies, incorporating a factor for Industry Diversity, Occupational Diversity, and Worker-Class Diversity[14]. Tallahassee is the only Apalachee Region community on the list. The capital city is ranked 184th for economic diversity, with a score of 73.99. However, that is only 4.10 points behind the leading city for diversification – Knik-Fairview, Alaska. The Capital's "Industry Diversity" and "Occupational Diversity" ranks are very low (425th and 436th, respectively), however its "Worker Class Diversity" Rank is 22nd. See Table 3 for a comparison of Florida city economic diversity scores and ranks.

[13] South Florida Regional Planning Council. 2012-2017 CEDS. http://www.sfrpc.com/CEDS/SouthFloridaCEDS2012-17.pdf
[14] WalletHub reports the use of the Herfindahl-Hirschman Index to calculate individual index scores.

Table 3: Economic Diversity Rankings for Florida Cities. Source: WalletHub

Florida City	Total Score	Industry Diversity Rank	Occupational Diversity Rank	Worker-Class Diversity Rank
Hialeah	75.18	10	9	336
Miami	75.12	23	95	261
Cape Coral	74.51	132	242	209
Fort Lauderdale	74.19	61	322	263
Tallahassee	73.99	425	436	22
Jacksonville	73.81	60	285	353
Port St. Lucie	73.67	262	184	251
Tampa	73	176	390	286
St. Petersburg	72.88	244	342	303
Orlando	71.15	294	353	472

The top ranked Florida economy for diversity is Hialeah (82nd overall), noted for its strong Industry and Occupational diversity. Tallahassee is ranked more diverse than Jacksonville and Tampa, but less so than Miami. In its class as a "Midsize" city, it ranks below Ft. Lauderdale, but above St. Petersburg and Port St. Lucie. Fort Lauderdale's highest individual rank is for Industry diversification (61st overall). Tallahassee ranks lowest of all Florida cities in both Industry and Occupational diversity, which is due to the concentration of state government.

To learn from the highest ranked midsize Florida city, this paragraph explores current diversification initiatives in Fort Lauderdale. The Southeast Florida city manages an economic diversification web page. The city highlights a *strong retail economy* on its economic diversification webpage. Dick's Sporting Goods is a recent retail incentives recipient. This bucks the trend of abandoning "low skill low wage" jobs within an economic development strategy. Lower wage / skill jobs can buttress employment during economic oscillations (e.g. supply shock, demand shock). The city also promotes diversification by incentivizing product development in green technologies. From its [Fast Forward Fort Lauderdale] plan, the city writes:

"Companies who were innovative and aggressive in pursuing and publicizing new products and services based on **climate adaptions** or **energy technologies** were **offered financial incentives**." The city also provides a statement of support to small businesses: "Cities are most powerful when they are small business incubators. There are 300,000 small businesses in Fort Lauderdale – there are opportunities for entrepreneurs."

Targeted small business assistance is an important takeaway from the Fort Lauderdale benchmark. Tallahassee can serve the adjacent Apalachee Region by *boldly* pursuing small business assistance in multiple sectors. This connects to the [VisionFirst Strategic Plan for the Tallahassee Leon County Office of Economic Vitality] via the following strategies:

- **Business Formation Action Plan (pp.35-37)**
    - Formalize and give continuity to the way entrepreneurialism is defined in Tallahassee-Leon County and how entrepreneurs are trained and prepared to enter existing programs for greater success.
    - Partner with local financial institutions to develop a secured funding program for entrepreneurs seeking capital.
    - Enhance the existing minority and women-owned program (MWSBEs) and develop a microsite to provide ease of access to competitive solicitations or bid opportunities.
    - Develop a suite of workshops and trainings…to help sustain the competitive and economic viability of small businesses.
- **Technology Transfer and Commercialization Action Plan (pp. 38-48)**
    - Establish a collaborative partnership with the Leon County Research and Development Authority, Florida State University, and FAMU to leverage resources and assets for developing a technology cluster centered on the National High Magnetic Field Laboratory.
    - Seek additional opportunities that align university research with business recruitment and cluster development.

Within the local policy playing field key interventions center on: assisted commercialization and local installation of businesses and supporting MWSBEs. **The Apalachee CEDS will advance economic diversification by extrapolating Office of Economic Vitality strategies to suit the Region at large.**

Resilient Objectives

Staff and steering committee members developed Apalachee resilient objectives from the previous needs assessment and knowledge of regional assets. The below objectives are grouped under goals in the Action Plan section of the Strategy. Blue text indicates disaster resilience-facing objectives; green text indicates economic resilience-facing objectives.

i. (Objective 1.1) Create an inter-county Apalachee business resilience task force that sources best practices for industry resilience.

ii. (Objective 1.2) Work to increase employee and business resilience to Hurricanes, Flooding, Severe Storms and Wildfires, through Local Mitigation Strategy updates and program assistance to support individual and group planning, weatherization, preparedness, continuity of operation, and mitigation.

iii. (Objective 1.3) Explore the twenty-four disaster mitigation funding options presented in the SEHMP for new applications in Apalachee Counties.

iv. (Objective 3.1) Meet the needs of a growing 55 and older community by planning for aging in place, older-adult facing business development, and more resilient assisted living and senior center facilities.

v. (Objective 1.4) Develop unified and responsive county and regional applications for TRIUMPH Inc and Job Growth Grant Fund on a yearly basis.

vi. (Objective 2.1) Explore industry-decline preparedness plans that assess infrastructure, real estate, talent, and amenities for local-government assisted market pivots following macroeconomic shifts.

vii. (Objective 2.2) Work to create a strong pipeline between High Magnetic Field Laboratory research/experiments and local business installation.

viii. (Objective 2.3) Assist efforts to diversify rural economies by advancing site readiness and promoting real estate re-use opportunities toward uses in professional/technical offices, warehousing, light/clean tech manufacturing, cloud data storage and agricultural technology.

Data Appendix

The following section contains tables, maps and graphs referenced by or informing the above sections of this document.

The 2017 CEDS Steering Committee

Apalachee Regional Planning Council would like to thank the following steering committee members for the guidance and insight provided during and beyond the 2017 update.

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Dominick Ardis DOMI Station

David Butler Carrabelle EDC

Julie Conley Jefferson County

Mark Curenton Franklin County Planning

Rick Frazier Tallahassee Community College

Henry Grant Gadsden EDC

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Danny Ryals Calhoun County School Board

Dianne Scholz Florida Institute of Government

Bill Stanton Jackson County Development Council

Woody Stewart City of Bristol

Davis Stoutamire Liberty County

Kristy Terry Calhoun Chamber of Commerce

Warren Yeager Gulf County EDC

Acronyms

ARPC – Apalachee Regional Planning Council

BEBR – Bureau of Economic and Business Research

CEDS – Comprehensive Economic Development Strategy

EDA – Economic Development Administration

EDD – Economic Development District

FSU – Florida State University

FAMU – Florida Agricultural & Mechanical University

MWSBE – Minority and Women Owed Small Business Enterprises

NAICS – North American Industrial Classification System

NWFL Forward – Northwest Florida Forward

REMI – Regional Economic Models Incorporated

RPC – Regional Planning Council

SEHMP – State Enhanced Hazard Mitigation Plan

SWOT – Strengths, Weaknesses, Opportunities, Threats

TCC – Tallahassee Community College

Tables

Figures

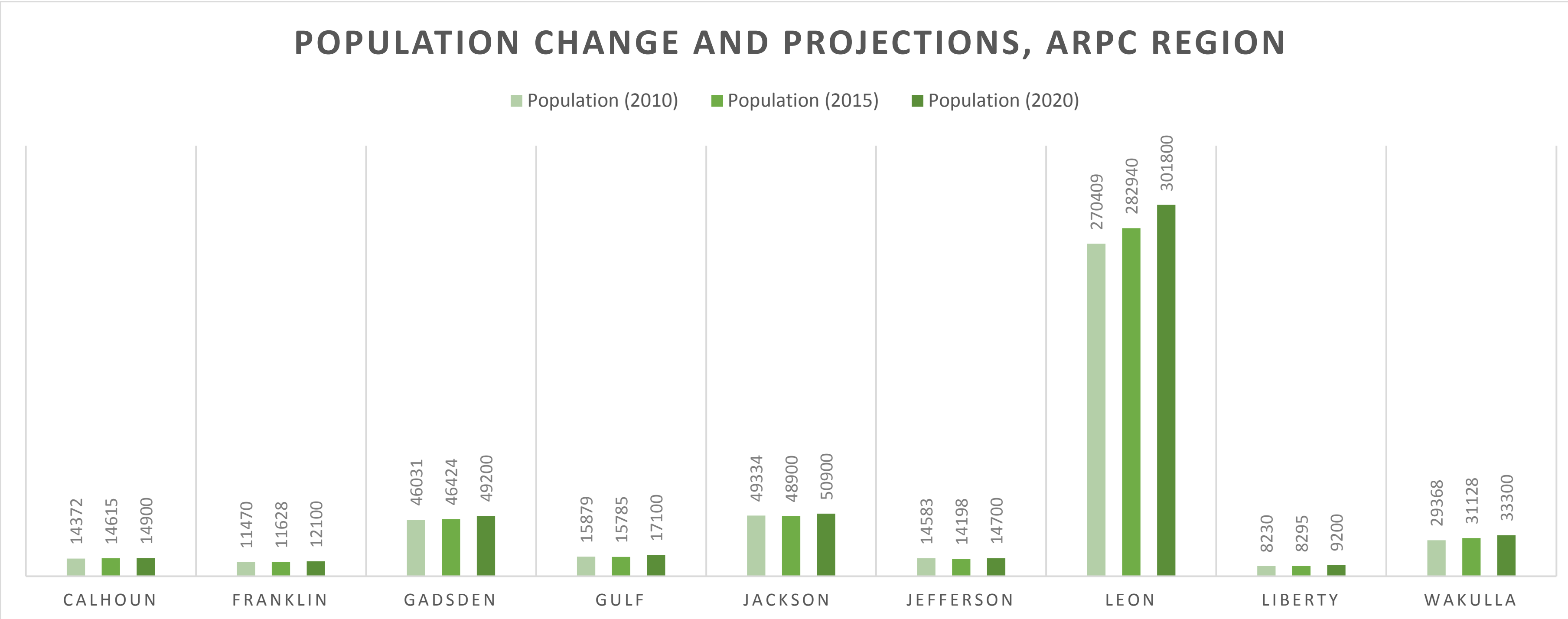
Table 4: Indicator Main Overview Table

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
Average Wages per job	$18,971	$16.565	$23,916	$21,323	$25,716	$17,782	$32,557	$22,769	$19,176
High School Graduation Rates (White, 2015-2016)	85.2	71.1	63.6	80	74.7	66.7	96.7	74.7	87.1
High School Graduation Rates (Black, 2015-2016)	61.5	0	70.3	81.8	65.7	71.9	85.2	0	91.2
Gross Domestic Product (2017) ($ Million)	$204	$395	$1,104	$429	$1,076	$227	$13,869	$160	$486
Trade Exports (Nation, 2016) ($ Million)	$84	$234	$318	$230	$377	$86	$3,409	$92	$220
Trade Imports (Nation, 2016) ($ Million)	$163	$237	$669	$272	$740	$220	$4,384	$139	$455
Population (2015)	14,615	11,628	46,424	15,785	48,900	14,198	282,940	8,295	31,128
Population (2020)	14,900	12,100	49,200	17,100	50,900	14,700	301,800	9,200	33,300

Tourism Development Taxes (2016)	$-	$3,675,32	$432,419	$2,104,52 2	$466,901	$93,074	$7,310,251	$-	$221,871
Annual Building Permits (2015)	8	55	38	104	34	27	695	15	136
Daily Vehicle Miles Traveled (2015)	660,132	507,133	2,234,373	560,590	2,905,675	1,173,897	7,588,191	551,742	1,159,406
Average Annual Unemployment Rates (2016)	5.7	4.3	6.3	4.5	5.3	5.3	4.6	5.3	4.1
Registered 501c3 Organizations (2016)	49	77	236	98	234	86	2098	33	120
Per Capita Income (2015)	$24,333	$33,973	$30,334	$30,125	$30,210	$36,596	$39,670	$25,492	$31,405
Relative Housing Price (2015)	.342	.631	.503	.403	.653	.401	.640	.375	.542
Poverty Rates (2015)	22.2	23.7	24.5	21.9	22.5	19.4	21.8	22.6	16.5
Economic Development Organization	Opportunity Florida	Opportunity Florida	Opportunity Florida	Opportunity Florida	Opportunity Florida	North Florida Economic Development Partnership	Office of Economic Vitality	Opportunity Florida	Opportunity Florida
Commuter Inflow/Outflow Ratio, 2014	1.469842149								

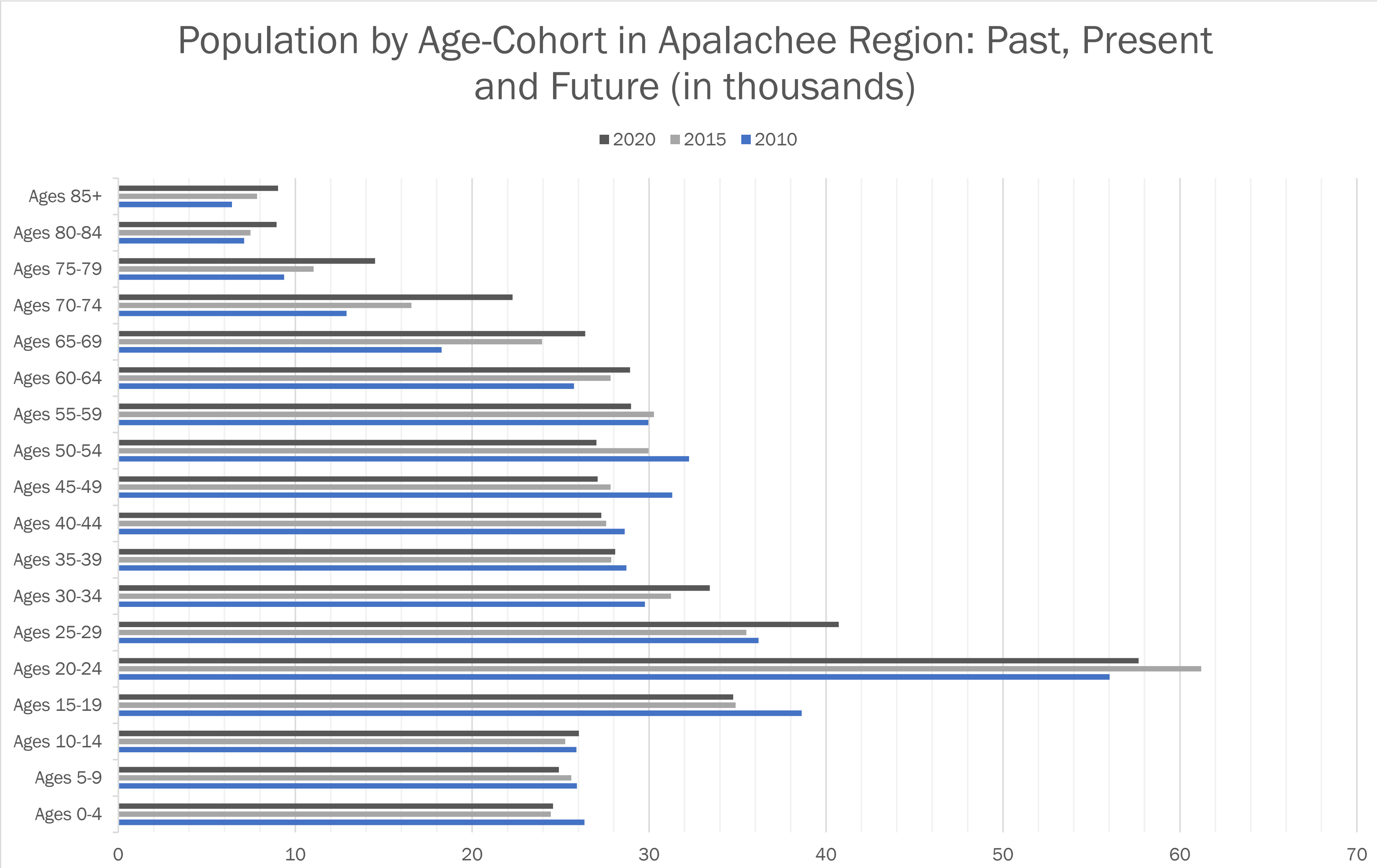
Regional Purchase Coefficient (2015)	0.142	0.201	0.208	0.186	0.223	0.109	0.487	0.074	0.152
Local Government Expenditures per Capita (2015)	$ 562.01	$2,499.79	$753.41	$1,453.93	$904.95	$1,394.87	$863.31	$1,184.77	$1,106.29

Figure 3: Talent Supply and Education – Population 2010, Present, 2020



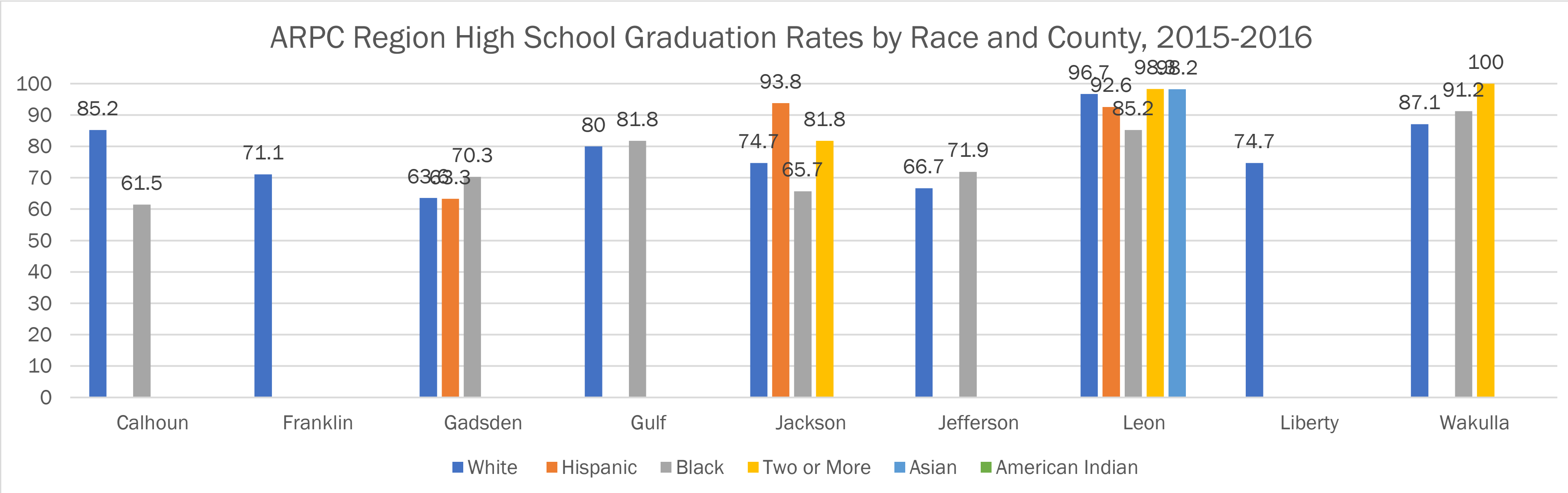
Source: American Community Survey

Figure 4: Population by Age-Cohort in Apalachee Region



Source: REMI PI+

Figure 5: ARPC Region High School Graduation Rates



Source: Florida Department of Education

Table 5: Apalachee District Grades, 2015-16

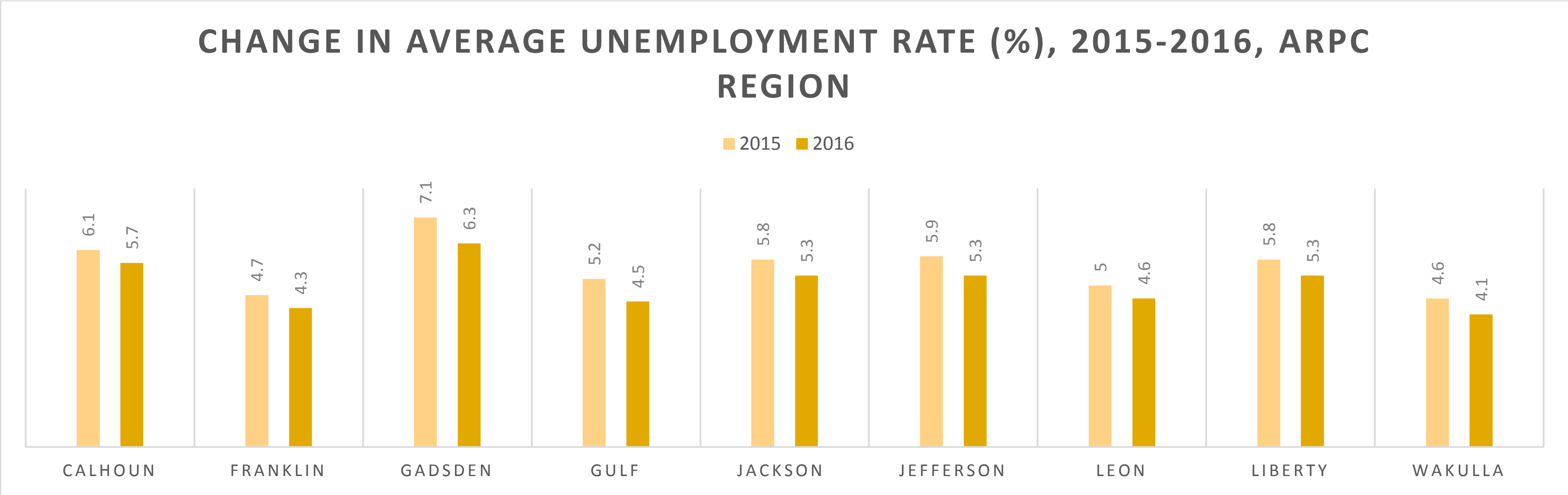
2015-16 School Grades			
	District	District Grade 2016	District Grade 2015
07	CALHOUN	B	A
19	FRANKLIN	C	C
20	GADSDEN	C	D
23	GULF	B	B
32	JACKSON	C	B
33	JEFFERSON	D	D
37	LEON	B	A
39	LIBERTY	B	B
65	WAKULLA	B	A

Table 6: Eighth Grade Math Achievement by District

					Percentage in Each Achievement Level				
District Name	**Grade**	**Number of Students**	**Mean Scale Score**	**Percentage in Level 3 or Above**	**1**	**2**	**3**	**4**	**5**
CALHOUN	08	130	343	54	20	26	18	14	22
FRANKLIN	08	45	326	27	40	33	18	9	0
GADSDEN	08	250	324	30	45	25	21	6	3
GULF	08	131	348	70	11	18	25	25	20
JACKSON	08	374	336	51	24	25	33	11	7
JEFFERSON	08	29	306	3	83	14	3	0	0
LEON	08	1,374	337	54	23	23	30	15	9
LIBERTY	08	15	319	13	67	20	13	0	0
WAKULLA	08	193	330	35	26	38	29	3	3

Source: Florida Department of Education, Florida Standards Assessments

Figure 6: Change in Average Unemployment Rate



Source: FREIDA Labor Market Information (DEO)

Figure 7: Apalachee Location Quotients, compared to Florida

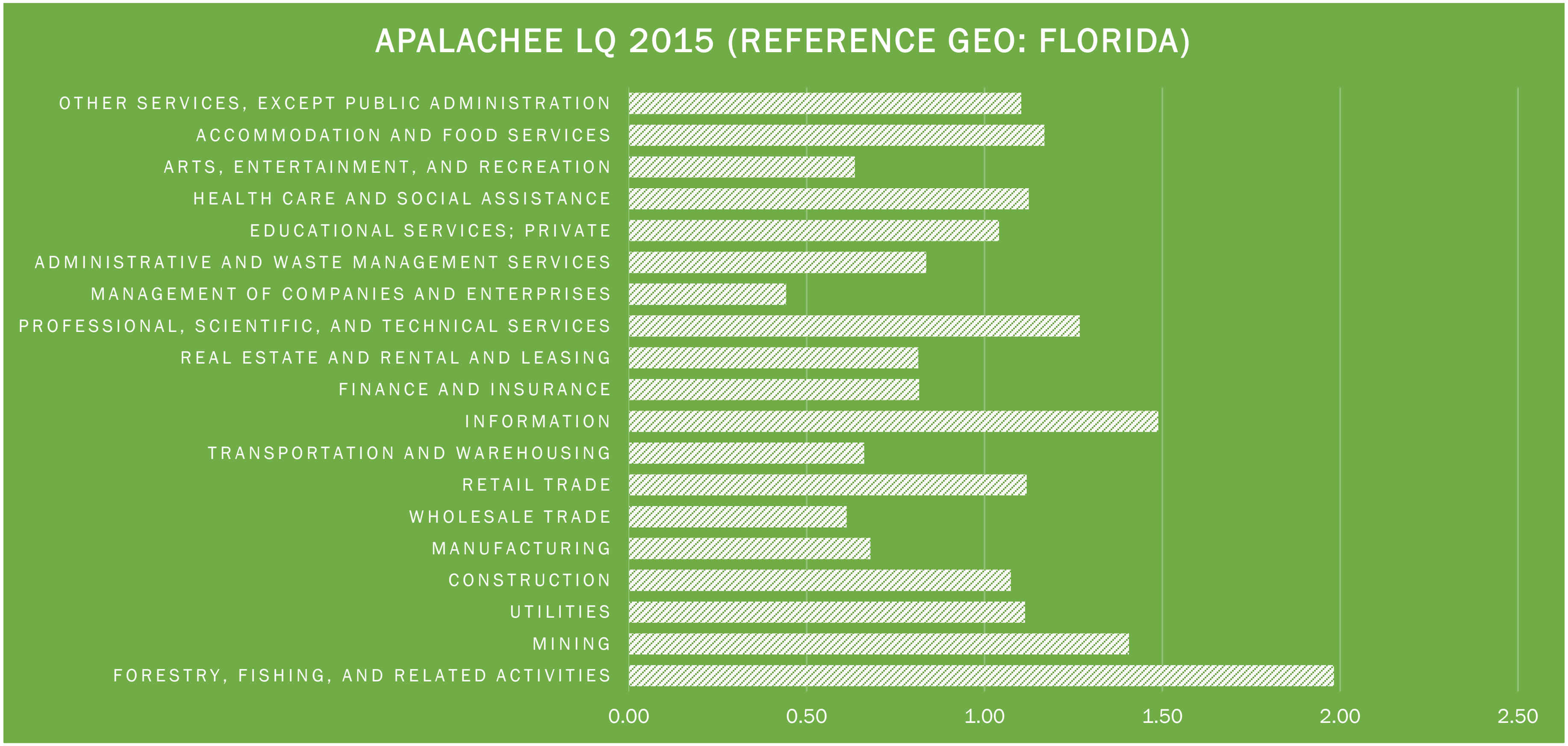


Table 7: Apalachee Region Location Quotients, Against Florida

	Location Quotient by Industry, Calculated against Florida				
	Category	2010	2015	LQ 2010	LQ 2015
ARPC REGION	Forestry, Fishing, and Related Activities	2.362	2.442	1.92	1.98
	Mining	0.549	0.809	1.18	1.41
	Utilities	0.594	0.506	1.20	1.11
	Construction	11.752	12.046	1.17	1.07
	Manufacturing	5.193	4.822	0.77	0.68
	Wholesale Trade	4.593	4.442	0.66	0.61
	Retail Trade	24.12	26.75	1.11	1.12
	Transportation and Warehousing	3.784	4.499	0.63	0.66
	Information	4.177	5.021	1.24	1.49
	Finance and Insurance	9.689	10.014	0.85	0.82
	Real Estate and Rental and Leasing	10.357	10.97	0.84	0.81
	Professional, Scientific, and Technical Services	18.237	18.607	1.35	1.27
	Management of Companies and Enterprises	0.548	0.955	0.30	0.44
	Administrative and Waste Management Services	12.057	14.072	0.75	0.84
	Educational services; private	4.323	4.253	1.09	1.04
	Health Care and Social Assistance	24.252	26.619	1.09	1.12
	Arts, Entertainment, and Recreation	3.687	4.009	0.64	0.64
	Accommodation and Food Services	18.232	21.419	1.15	1.17
	Other Services, except Public Administration	14.332	16.013	1.11	1.10
	TOTAL, Private, Non-Farm	**172.838**	**188.268**		
	Public Admin (excl. military)	72.931	70.803		

Source: REMI PI+

Figure 8: Apalachee Location Quotients, compared to United States

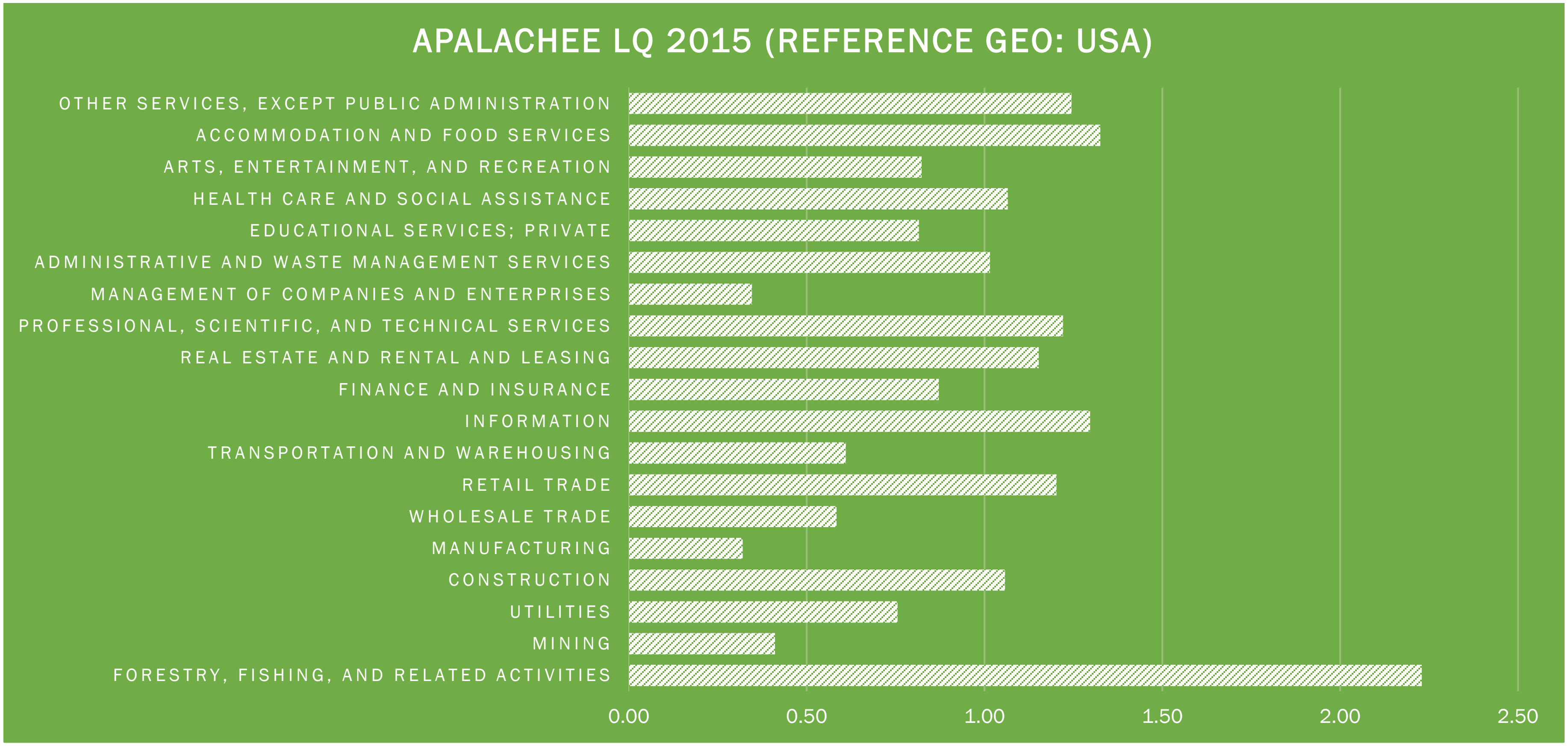


Table 8: Apalachee Region Location Quotients, against Nation

	Location Quotient by Industry, Calculated against Nation				
	Category	**2010**	**2015**	**LQ 2010**	**LQ 2015**
ARPC REGION	Forestry, Fishing, and Related Activities	2.362	2.442	2.33	2.23
	Mining	0.549	0.809	0.37	0.41
	Utilities	0.594	0.506	0.86	0.76
	Construction	11.752	12.046	1.13	1.06
	Manufacturing	5.193	4.822	0.36	0.32
	Wholesale Trade	4.593	4.442	0.64	0.58
	Retail Trade	24.12	26.75	1.16	1.20
	Transportation and Warehousing	3.784	4.499	0.58	0.61
	Information	4.177	5.021	1.09	1.30
	Finance and Insurance	9.689	10.014	0.89	0.87
	Real Estate and Rental and Leasing	10.357	10.97	1.13	1.15
	Professional, Scientific, and Technical Services	18.237	18.607	1.31	1.22
	Management of Companies and Enterprises	0.548	0.955	0.23	0.35
	Administrative and Waste Management Services	12.057	14.072	0.98	1.02
	Educational services; private	4.323	4.253	0.89	0.82
	Health Care and Social Assistance	24.252	26.619	1.07	1.07
	Arts, Entertainment, and Recreation	3.687	4.009	0.82	0.82
	Accommodation and Food Services	18.232	21.419	1.28	1.33
	Other Services, except Public Administration	14.332	16.013	1.24	1.24
	TOTAL, Private, Non-Farm	**172.838**	**188.268**		
	Public Admin (excl. military)	72.931	70.803		

Source: REMI PI+

Figure 9: Shift Share, Causes of Growth or Decline in Apalachee Industries 2010-2015

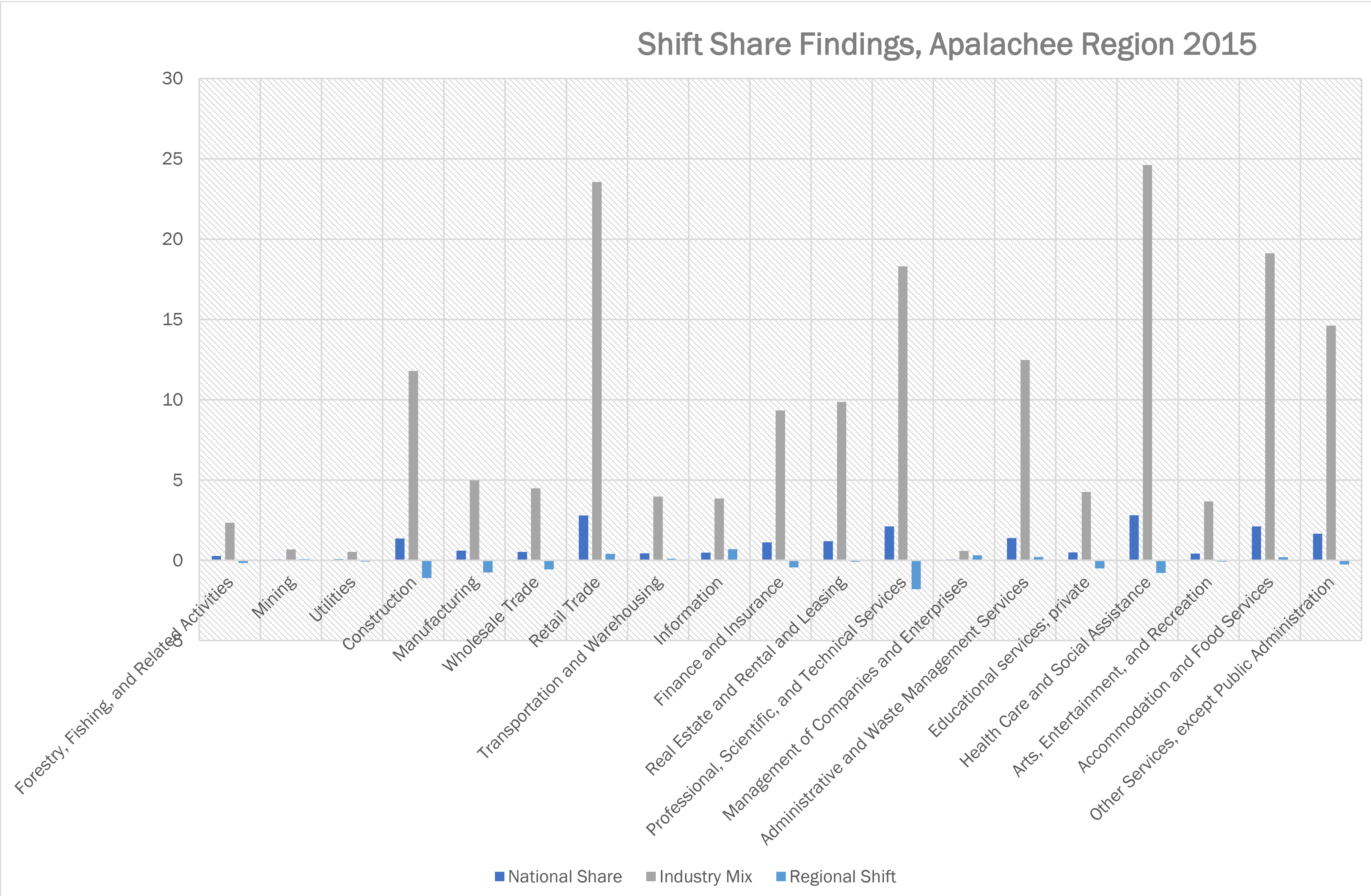


Table 9: Apalachee Region Shift-Share Analysis

SHIFT SHARE ANALYSIS, Apalachee Region Shift Share = NS + IM + RS

		NS = ilocal(t-1) * Us(t)/US(t-1)	IM = (ilocal(t-1)* (iUS(t)/iUS(t-1))-NS	RS= ilocal(t-1)*((ilocal(t)/ilocal(t-1)) - (iUS(t)/iUS(t-1))
	Category	National Share	Industry Mix	Regional Shift
ARPC REGION	Forestry, Fishing, and Related Activities	0.272815914	2.338721075	-0.169536989
	Mining	0.063410642	0.673252106	0.072337252
	Utilities	0.068608236	0.521428023	-0.084036259
	Construction	1.357380447	11.78833215	-1.099712602
	Manufacturing	0.599802303	4.978930986	-0.756733289
	Wholesale Trade	0.530501055	4.479837499	-0.568338553
	Retail Trade	2.785910176	23.5620253	0.402064519
	Transportation and Warehousing	0.437059872	3.963565815	0.098374313
	Information	0.482452189	3.850324013	0.688223797
	Finance and Insurance	1.119099656	9.330356919	-0.435456575
	Real Estate and Rental and Leasing	1.196255045	9.862820916	-0.089075962
	Professional, Scientific, and Technical Services	2.106411438	18.3080747	-1.807486134
	Management of Companies and Enterprises	0.06329514	0.582762505	0.308942355
	Administrative and Waste Management Services	1.392608582	12.47632941	0.203062004
	Educational services; private	0.499315493	4.260768462	-0.507083955
	Health Care and Social Assistance	2.801156451	24.61260822	-0.794764666
	Arts, Entertainment, and Recreation	0.42585617	3.669109932	-0.085966102
	Accommodation and Food Services	2.105833927	19.11309101	0.200075061
	Other Services, except Public Administration	1.655375814	14.62255131	-0.264927124

Source: REMI PI+

Table 10: StatsAmerica Index Scores, Apalachee Region

Headline (Innovation) Index, 2016

County	Index Value	Rank of 3,110	Median Value
Leon FL	96.7	561	84.3
Wakulla FL	95.8	608	84.3
Franklin FL	79.1	2044	84.3
Jackson FL	77.3	2208	84.3
Liberty FL	73.4	2560	84.3
Jefferson FL	72.7	2614	84.3
Calhoun FL	67.8	2905	84.3
Gulf FL	66.9	2937	84.3
Gadsden FL	63.9	3031	84.3

Economic Well-Being Index, 2016

County	Index Value	Rank of 3,110	Median Value
Wakulla FL	122.5	947	109.7
Leon FL	102.8	1899	109.7
Franklin FL	97.9	2136	109.7
Gulf FL	96.1	2248	109.7
Liberty FL	89.7	2595	109.7
Jefferson FL	88.8	2634	109.7
Calhoun FL	83.5	2820	109.7
Jackson FL	83.3	2829	109.7
Gadsden FL	75.2	3011	109.7

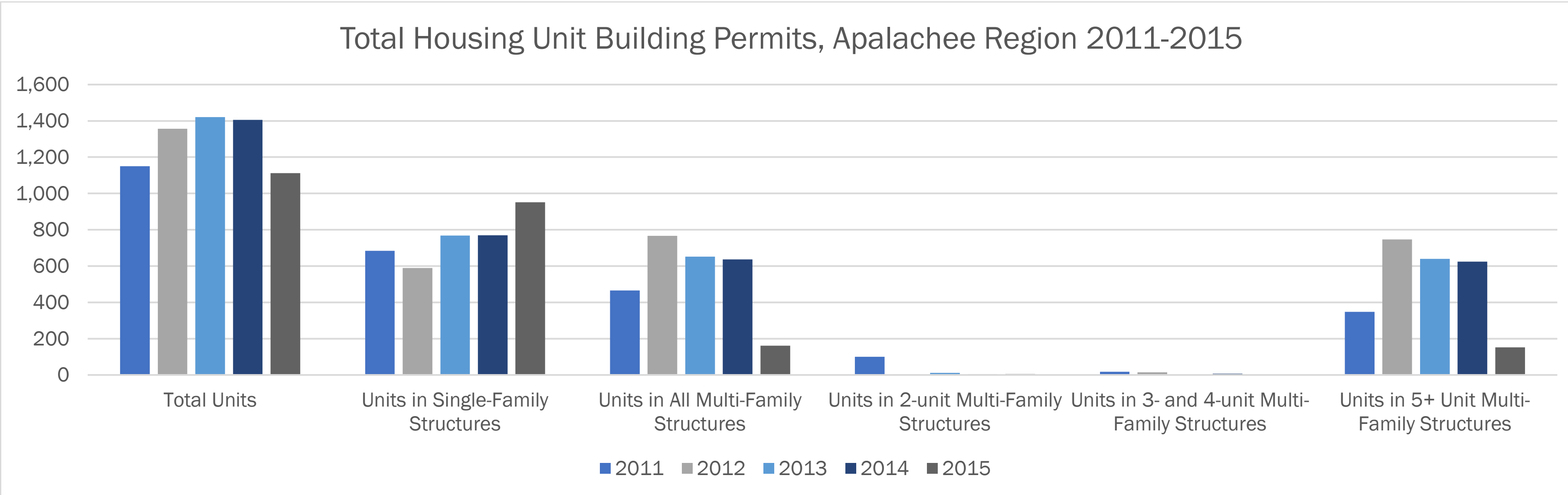
Source: StatsAmerica

Table 11: Daily Vehicle Miles Traveled, Apalachee Region

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC Region
Daily Vehicle Miles Traveled										
2012	646,061	472,144	2,082,671	516,444	2,838,215	1,082,566	7,104,052	527,026	1,076,469	16,345,648
% change 12-13	- 1.4%	7.4%	6.4%	4.9%	0.6%	5.2%	1.4%	0.2%	- 0.4%	2.2%
2013	636,819	507,307	2,215,353	541,532	2,856,248	1,139,222	7,202,667	528,276	1,071,659	16,699,083
%change 13-14	1.2%	- 4.0%	- 1.4%	3.9%	0.3%	- 1.5%	2.5%	0.8%	5.4%	1.2%
2014	644,471	487,046	2,185,134	562,897	2,863,674	1,122,081	7,379,241	532,313	1,129,047	16,905,904
%change 14-15	2.4%	4.1%	2.3%	- 0.4%	1.5%	4.6%	2.8%	3.6%	2.7%	2.6%
2015	660,132	507,133	2,234,373	560,590	2,905,675	1,173,897	7,588,191	551,742	1,159,406	17,341,139

Source: Florida Department of Transportation

Figure 10: Housing Unit Building Permits, Apalachee Region



Source (above): US HUD

Table 12: Water Statistics, Apalachee Region

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC Region
Water Usage, Past and Future (In Million Gallons per Day)										
2010	4.23	4.09	18.38	2.78	25.36	3.14	41.77	4.06	5.34	109.15
2035	4.46	2.47	19.26	2.88	30.83	3.29	49.81	5.37	6.23	124.6

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC Region
Industrial/Commercial/Institutional Water Use, Past and Future (In Millions of Gallons per Day)										
2010	0	1.73	0.46	0.38	1.75	0	0	0.42	1.09	5.83
2035	0	0.02	0.75	0.4	2.03	0	0	0.32	1.16	4.68

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC Region
Agricultural Water Use, Past and Future (In Million Gallons per Day)										
2010	2.57	0	11.82	0.15	16.24	1.3	0.42	0.01	0.26	32.77
2035	2.57	0	11.82	0.15	23.23	1.3	0.32	0.01	0.26	39.66

A Water Resource Caution Area, which meets withdrawals with heightened scrutiny and conservation requirements, exists in Gadsden County at the Upper Telogia Creek drainage basin.

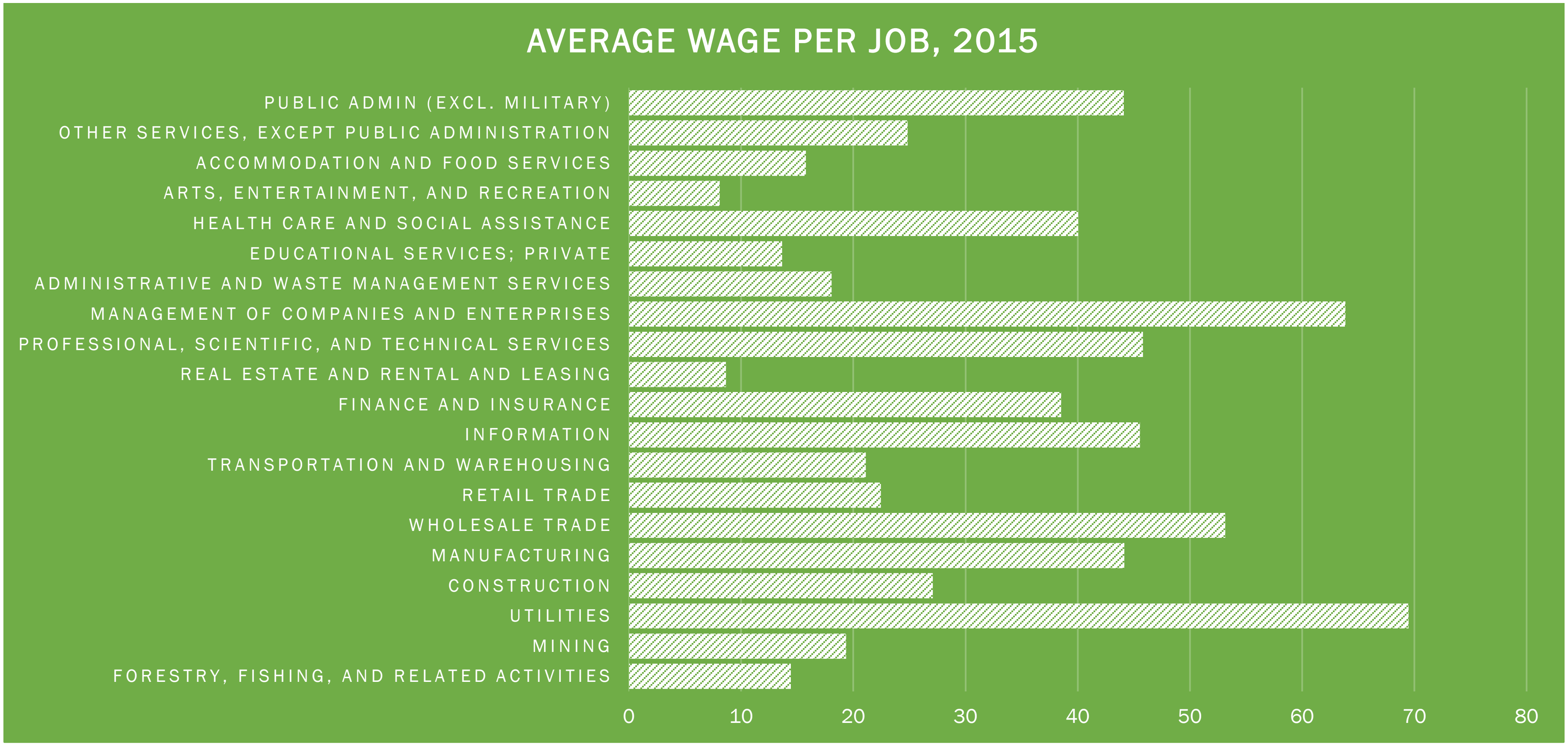
Source: http://www.nwfwater.com/Water-Resources/Water-Supply-Planning pp. 7-10, 161-164

Table 13: Gross Regional Product (Gross Domestic Product by County)

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
Gross Regional Product									
2015	$196,000,000.00	$380,000,000.00	$1,066,000,000.00	$412,000,000.00	$1,031,000,000.00	$220,000,000.00	$13,109,000,000.00	$155,000,000.00	$466,000,000.00
2016	$200,000,000.00	$387,000,000.00	$1,080,000,000.00	$420,000,000.00	$1,051,000,000.00	$223,000,000.00	$13,445,000,000.00	$157,000,000.00	$475,000,000.00
2017	$204,000,000.00	$395,000,000.00	$1,104,000,000.00	$429,000,000.00	$1,076,000,000.00	$227,000,000.00	$13,869,000,000.00	$160,000,000.00	$486,000,000.00

Source: REMI PI+

Figure 11: Average Wages per Job, Apalachee Region 2015



Source: REMI PI+

Table 14: Average Annual Wage Rate, Apalachee Region

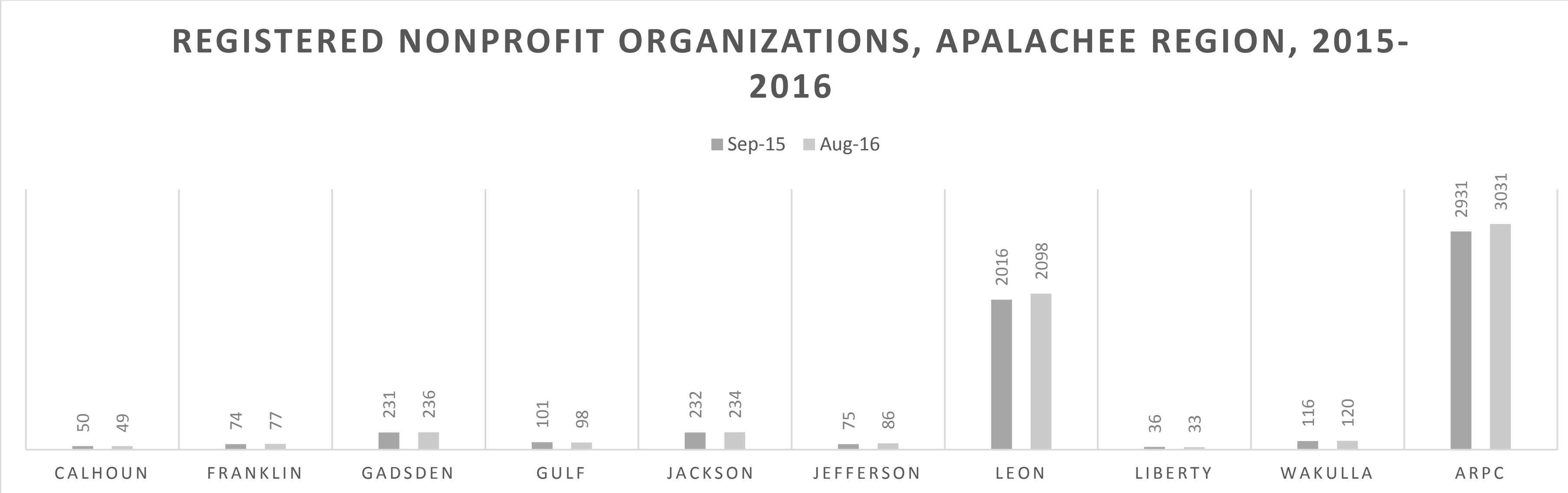
Average Annual Wage Rate for Apalachee Region Industries

	Category	2010	2015	2020
ARPC REGION	Forestry, Fishing, and Related Activities	11.662	14.434	15.985
	Mining	24.619	19.353	22.469
	Utilities	51.529	69.484	84.788
	Construction	24.638	27.074	31.442
	Manufacturing	41.278	44.146	53.334
	Wholesale Trade	43.79	53.152	62.681
	Retail Trade	20.664	22.46	26.967
	Transportation and Warehousing	20.433	21.118	24.936
	Information	40.348	45.553	56.776
	Finance and Insurance	37.629	38.522	46.166
	Real Estate and Rental and Leasing	7.329	8.663	10.176
	Professional, Scientific, and Technical Services	41.439	45.804	52.702
	Management of Companies and Enterprises	60.237	63.856	74.412
	Administrative and Waste Management Services	19.322	18.055	20.869
	Educational services; private	13.145	13.659	15.42
	Health Care and Social Assistance	36.363	40.024	45.846
	Arts, Entertainment, and Recreation	7.825	8.089	9.391
	Accommodation and Food Services	13.752	15.783	18.258
	Other Services, except Public Administration	24.625	24.833	29.059
	Public Admin (excl. military)	41.029	44.094	52.177

Source: REMI PI+

Civic and Governance Systems

Figure 12: Registered Nonprofits, Apalachee Region



Source: NCCS

Table 15: 501c3 Organizations, Apalachee Region

Indicator	Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla	ARPC
501c3 Organizations										
Sep-13	40	61	203	82	210	72	1773	34	115	2590
Sep-14	42	67	204	93	221	70	1902	35	115	2749
Sep-15	50	74	231	101	232	75	2016	36	116	2931
Aug-16	49	77	236	98	234	86	2098	33	120	3031

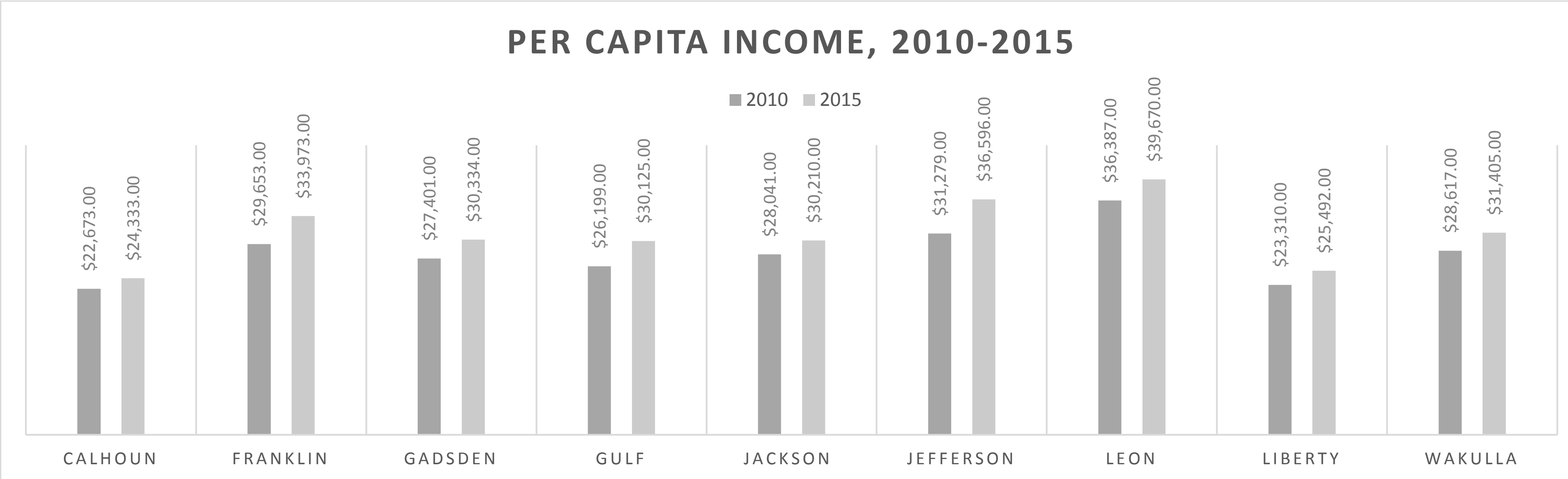
Table 16: Relative Housing Prices, Apalachee Region

Indicator		Calhoun	Franklin	Gadsden	Gulf	Jackson	Jefferson	Leon	Liberty	Wakulla
Relative Housing Price										
	2005	0.407	0.899	0.605	0.488	0.772	0.481	0.89	0.447	0.648
	2010	0.358	0.7	0.532	0.429	0.664	0.423	0.605	0.393	0.57
	2015	0.342	0.631	0.503	0.403	0.653	0.401	0.64	0.375	0.542
	2017	34%	62%	50%	40%	65%	40%	64%	37%	54%

Indicator		Apalachee Region
Relative Housing Price		
	2005	0.805
	2010	0.586
	2015	0.601
	2020	0.603

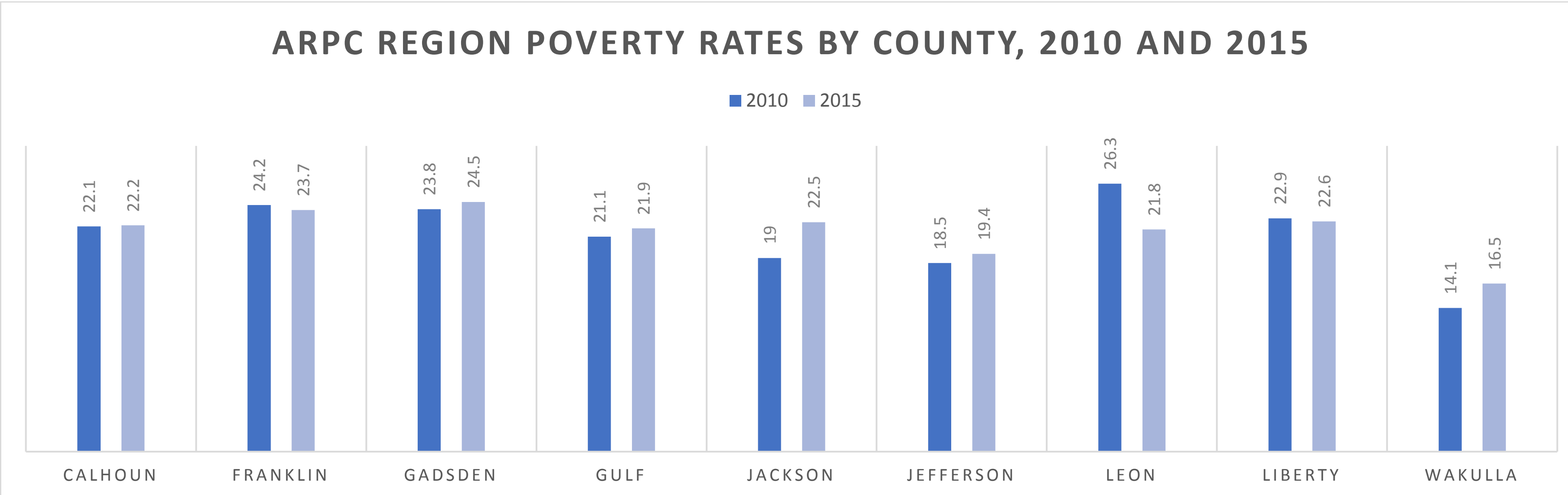
Source: REMI PI+

Figure 13: Per Capita Income, Apalachee Region



Source: Bureau of Economic Analysis

Figure 14: Poverty Rates, Apalachee Region



Source: Census Small Area Income and Poverty Estimates

Committee Surveys, Input and Other Feedback

The CEDS Committee were asked on several occasions to enhance the strategy via their input. This section describes the responses gathered from the engagement.

Data Stories Survey

The Data Stories Survey asked respondents to pin narratives to the six-pillar indicators data collected for the strategy. It can be viewed at this link:

https://www.surveymonkey.com/r/CLKXC7J

Table 17: Data Stories Responses

Talent Supply, Education Stories	• Development of technical training and education at the post-secondary level; • Leon County is the center of higher education and white-collar work in the Region. Being such a concentrated area for higher learning, at any one time there are tens of thousands of talented individuals gaining knowledge and skills within our community that could be used to better the Region. The majority of them find their first job out of school outside of Leon County and outside of the Region. Education, particularly higher education, is a central component of the local economy, and our biggest export is the talent supply produced here.
Entrepreneurship Stories	• Spark @ TCC; AERO; DOMI Station • Leon County is based around state government and the university system. From specific employment base standpoint, entrepreneurship is not a primary driver for the local economy. Most other local sectors are tied to or are a trickle down of the base of state government and university system. However, universities and a thriving, evolving young culture can provide an excellent environment for entrepreneurship. There are groups doing great things -- Domi Station, for example, as an incubator. But we are just scratching the surface of opportunity for young entrepreneurs in our community.
Infrastructure Stories	• Investment in Transportation and Logistics Center @ TCC • Tallahassee's infrastructure is improving. Bicycle and pedestrian facilities being more heavily prioritized, the placement of utilities underground being targeted, and the airport being designated for international shipping use. Its major roadways are often handicapped by being FDOT right-of-way. This has prevented Tallahassee from meeting some of its infrastructure goals, and affected patterns of growth in ways that disproportionately raise Tallahassee's infrastructure demands. Looking regionally, infrastructure improvements that I feel could be improved is getting homes off of septic. Some of our highest usage of septic systems is in close proximity to some of the Region's best natural assets, putting another economic driver at risk and its systems in decline.
Governance and Planning Stories	• Office of Economic Vitality (OEV)

Quality of Life Stories	• OEV – 1 cent penny sales tax being used for economic development projects; Cascades Park

Name Your Assets Survey

The Name Your Assets Survey asked participants to enhance the CEDS' library of six-pillars codified assets. It can be viewed at this link:

https://www.surveymonkey.com/r/CLTSYJ6

Table 18: Name Your Assets Responses

Talent Supply, Education Assets	Tallahassee Community College
Real Estate Assets	
Infrastructure Assets	TCC – Transportation and Logistics Center (Practice Driving Pad)
Entrepreneurial/Small Business Assets	TCC Incubation Center for Small Businesses
Policy/Planning Assets	
Other Assets	

SWOT Survey

The SWOT Survey asked Committee members to enhance the CEDS' record of internal characteristics (Strengths and Weaknesses) and external phenomena (Opportunities and Threats) affecting the Apalachee Region. The Survey can be viewed at this link:

https://www.surveymonkey.com/r/8BRP6PP

Asset Maps

The CEDS committee were asked to contribute an evolving asset map. The map, hosted on google, could be updated throughout the composition of the CEDS. Additionally, Apalachee RPC created a map of assets to complement the committee map with basic ED assets.

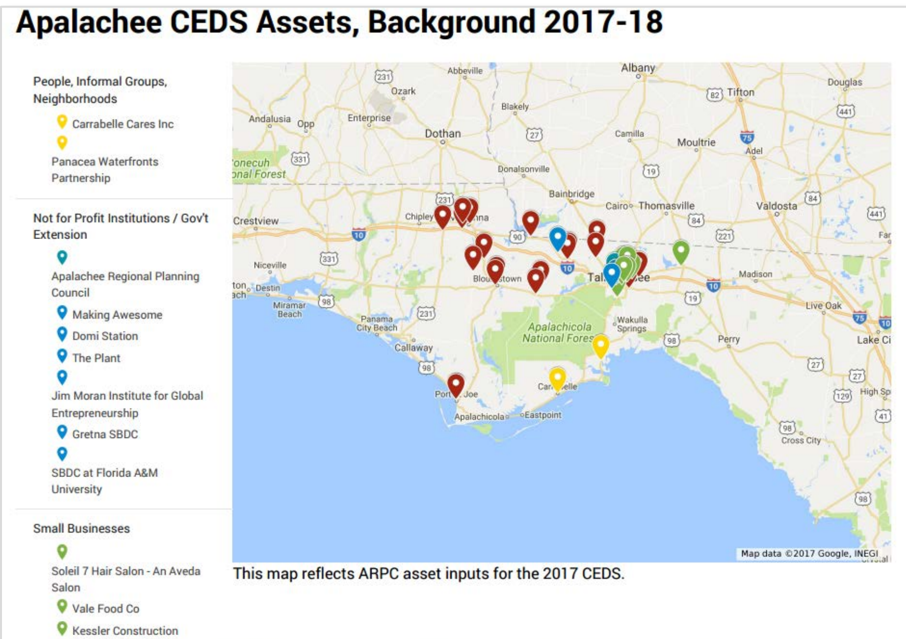


Figure 16: Apalachee Assets, Background Map

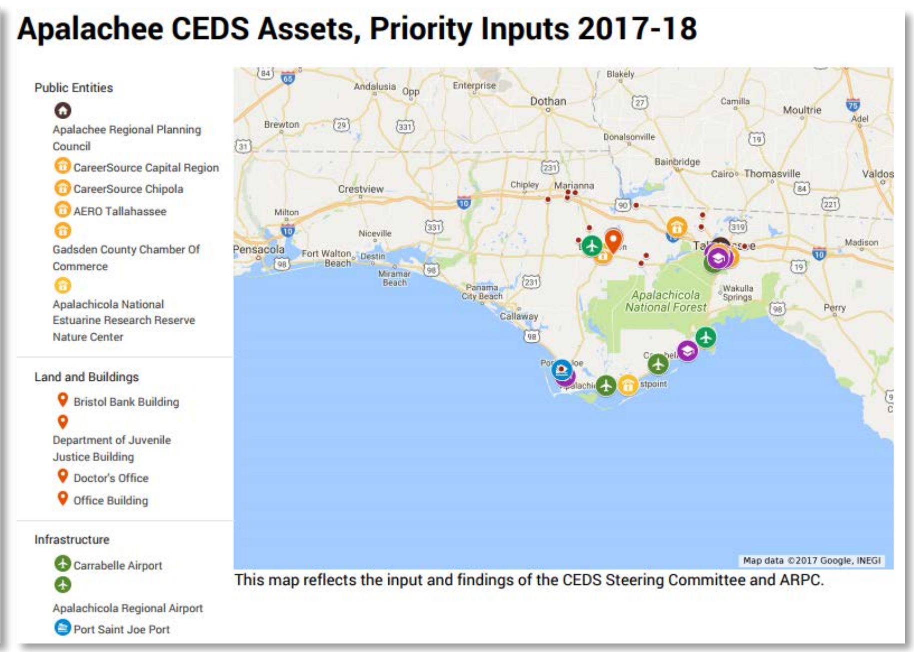


Figure 15: Apalachee Assets, Priority Inputs Map

SWOT Appendix

Table 19: Detailed SWOT, Strengths

Strengths								
Talent Supply and Education	Innovation and Economic Development	Infrastructure and Growth Leadership	Business Climate and Competitiveness	Civic and Governance Systems	Quality of Life and Quality Places	Natural Resources	Agricultural Assets	Industries (LQ above 1, outpacing National Sector growth)
Florida State University, esp. College of Criminology, School of Information Library Media Program, Black Law Students Association, National High Magnetic Field Laboratory, Online C.S., College of Medicine Community Health, (Law) Moot Court Team, Askew School of Public Admin	Opportunity Florida	Leon: Innovation Park	Leon County Prosperity Index Higher than Escambia (2014) at US Cluster Mapping: https://www.clustermapping.us/region	High concentration of 501c3 in Leon and Gadsden County	Tallahassee/Leon: All Saint's District, Midtown, South Monroe and Adams, Cascades Park and FAMU Way, Chain of Parks, Tom Brown, Lafayette Park, Greenways (Alford/Miccosukee), Market Square, Maclay Gardens, Mission San Luis, St. Marks Trail	Apalachicola National Forest	Farmland in Gadsden, Jackson and Jefferson	Information

Florida A&M University, esp. School of Engineering, High School Counselor Program, Historically Black College, School of Architecture	North Florida Economic Development Partnership	Jackson: Industrial Mega Site	High Capacity, best-practice land development regulations and permitting in Leon County	Strong Water Management District Supply Forecast	Gadsden: Quincy and Chattahoochee Main Street	St. Marks Wildlife Refuge	Forest area in Liberty and Calhoun County	Retail Trade
Tallahassee Community College, esp. AERO, Transportation and Logistics Center, Spark, Wakulla Environmental Institute, Public Safety Institute	Office of Economic Vitality	Gadsden and Associated Counties: Certified Industrial Sites	All counties have relaxed Comprehensive Plan requirements, per 163.3184	Tallahassee limit on individual campaign contributions	Calhoun: Blountstown Mainstreet; Apalachicola Waterfront Park (in development)	Torreya State Park	Fishing and aquaculture in Wakulla, Franklin and Gulf County	Accommodation and Food Services
Florida State University Marine Lab in Franklin County	Emerging Entrepreneurship Ecosystem: DOMI Station, The Plant, Jim Moran Center for Entrepreneurship	Gulf: Port of Port St. Joe		Penny Sales Tax for Economic Development in Leon County	Jackson: Marianna Caves	St. Marks River		Transportation and Warehousing
	High StatsAmerica "Innovation Index" Score for Leon and Wakulla	CSX, Apalachicola Northern Railroads		Waterfronts and Main Street Organizations in Gadsden, Wakulla and Calhoun County	Wakulla: St. Marks Refuge, Wakulla Springs	Wacissa River		
	High StatsAmerica "Economic Well Being Index" for Wakulla				Gulf: Port St. Joe Reid Avenue	Apalachicola River and NERR (Nat'l Estuarine Research Reserve)		

57 patents in Leon, 5 in Wakulla, 1 in Gadsden (2013), US Cluster Mapping: https://www.clustermapping.us/region	Franklin: Apalachicola Downtown	Ochlockonee River
	Jefferson: Monticello Downtown	Chipola River
	Liberty:	Apalachicola Bay, including St George Island
		Apalachee Bay

Table 20: Detailed SWOT, Weaknesses

Weaknesses

Talent Supply and Education	Innovation and Economic Development	Infrastructure and Growth Leadership	Business Climate and Competitiveness	Civic and Governance Systems	Quality of Life and Quality Places	Natural Resources	Agricultural Assets	Industries (LQ above 1, growth outpaced by National Sector level growth)
No School District in entire region with above "B" grade, 2016	Low StatsAmerica Innovation Index Score for 7 of 9 counties	8 of 9 counties assert difficulty with Industrial/Commerce Park Infrastructure provision	Prosperity Index below $20K in Wakulla, Jefferson, Calhoun and Liberty counties	Water Caution Area in Gadsden at Telogia	8 of 9 counties residents travel for retail, leisure, and accommodation expenditures	No Mountains	Low amount of value-add activity; direct commodity exports	Health Care and Social Assistance
Three "C" grades, One "D" district grade in 2016	Low StatsAmerica "Economic Well Being Index" Score for 8 of 9 counties		Lower Capacity Land Development and Planning in some Apalachee areas	No Tourism Development Tax Collected in Calhoun or Liberty County	No Accommodation (Hotels) in Liberty or Calhoun County	No inland cities with developed waterfront area		Construction

No Patents for 6 of 9 counties, 2013	Lack of Urban Service Area limits and Comp Planning outside of Tallahassee	Affordability / Attainability of housing to student pockets and renters in multiple areas	Professional, Scientific and Technical Services
		All counties below 2015 Florida median hh income level ($47,507)	Forestry Fishing and Related Activities

Table 21: Detailed SWOT - Opportunities

Opportunities

Climate	**Laws**	**World Trade**	**Population Change**	**Environmental Change**	**Macro-Economic Change**	**Technological Change**	**Macro-Educational Change**
Warmer climate	Continued Healthcare Reform	New Foreign Direct Investment	General Southward Migration	Florida Forever; Amendment 1	Innovation in service based economy	Rise of AI	Increased School Choice
	Florida GAA	New International Trade Opportunities	Young Population in an older state		Advanced Manufacturing	Robotics (Healthcare and Manufacturing)	Continuing World Class Higher Education
			Increased Urbanization		Sharing Economy	Renewable Energy	
			Planning for "urbanizing" rural areas		Florida ranked # 11 in Site Selector Magazine for Economic Development http://siteselection.com/issues/2016/nov/cover.cfm	3D Printing (from microscopic to entire buildings)	
					Florida ranked # 10 for New Plants (in 2016) by Site Selector Magazine http://siteselection.com/issues/2016/nov/cover.cfm	Automated Vehicles	
						Advanced Professional and Consumer Electronics	
						Rise of Bio Engineering	

Table 22: Detailed SWOT - Threats

Threats

Climate	Laws	World Trade	Population Change	Environmental Change	Macro-Economic Change	Technological Change	Macro-Educational Change
More severe disasters, more often (drought, flood, heat, cold)	Immigration	Off-shoring	Aging Florida Population	Floridan Aquifer potentiometric line rising (saltwater intrusion)	Low wage service based economy	Digital Threats	Charter School Accountability
	Continued Healthcare Reform	Changing International Trade Agreements		Microplastics	Stagflation as the new normal	Bioweapons	Slow Adaptability of School Systems to modern knowledge economy/workforce needs
				Oil Spills / Environmental Disasters	Florida ranked # 36 for New Firm "Tax Index" by Site Selector Magazine	Terrorism	

Objectives Ranking

CEDS Steering Committee members were polled to determine priority objectives. The results of that ranking are shown below. The lowest two ranked were replaced by new objectives and other objectives were re-crafted after the ranking.

		Priority Rank									
	Objective	Response 1	CEDS Group 1	CEDS Group 2	CEDS Group 3	CEDS Group 4	CEDS Group 5	Response 6	Other	Average Rank	RANK
2.3	Rural site readiness	1	1	1	1	1	1			1	**1**
3.2	Mobile Incubator	1	1	1	1		2	1		1.166667	**2**
1.13	Promote startups to install satellite office in rural Apalachee	1	3	1	1	1	1.3333	1		1.333329	**3**
2.9	Entrepreneurship 1-stop resource	1	2	1	2		1.5	1		1.416667	**4**
2.12	Forest Economic Development	1	3	2	1	1	1	2		1.571429	**5**
3.4	Rural Planning	1	1	1	3	2	2	1		1.571429	**6**
2.4	I-10 Plans	1	1	3	1	2.5	2	1		1.642857	**7**
3.3	Local Government Startup Investment	1	2	2	3	1.5	1	1		1.642857	**8**
1.4	TRIUMPH JGGF apps	1	2	1	1		2	3		1.666667	**9**
1.10	New Amenity Finance	1	3	3	1		1	1		1.666667	**10**
2.13	FLZ Economic Development	1	3	2	1		1	2		1.666667	**11**
1.11	Arts-Placemaking	3	2	1	1	1	1	3		1.714286	**12**
2.5	Enviro-Entrepreneurship	2	1	1	3	1	1	3		1.714286	**13**
3.1	Assisted Living Resilience	3	1	2	2	1	1	2		1.714286	**14**
1.1	Biz Resilience Task Force	1	1	3	2		3	1		1.833333	**15**
1.7	Planning Summit	2	1	1	3		2	2		1.833333	**16**

2.8	Jim Moran Program	2	2	1	2		3	1	1.833333	**17**
2.11	Workforce Development Collaboration	1	3	2	1		2	2	1.833333	**18**
1.12	Arts-School Board	3	1	1	2	1	2	3	1.857143	**19**
2.2	MagLab commercialization	1	2	1	2	2	3	2	1.857143	**20**
1.2	Disaster Resilience	2	1	3	2		2	2	2	**21**
1.3	SEHMP funding	2	1	2	3		1	3	2	**22**
1.5	Apalachee Outdoors	3	2	2	1		1	3	2	**23**
2.6	Renewable Entrepreneurship	2	1	2	3	2	1	3	2	**24**
3.7	Youth Income Generating Activity Programs	1	2	1	3		2	3	2	**25**
3.5	Art-Private Partnerships	3	1	1	3	2	2	3	2.142857	**26**
2.1	Post-industry decline plan	1	3	1	3		3	2	2.166667	**27**
2.10	Food Systems	1	3	1	3	2	3	3	2.285714	**28**
2.15	Airport Economic Development	1	3	3	3	3	1	2	2.285714	**29**
1.9	Multi-County EDD	1	2	3	3		3	2	2.333333	**30**
2.7	Dedman Program	2	2	2	3		3	2	2.333333	**31**
3.6	Art Economic Development	3	1	2	3	3	1.5	3	2.357143	**32**
2.14	Jackson Economic Development	1	3	3	3	3	2	2	2.428571	**33**
1.8	ED Sister Cities	2	3	3	2		3	2	2.5	**34**
1.6	Combine ED / TDC	3	3	2	3		3	2	2.666667	**35**

2018 – 2022 Apalachee Comprehensive Economic Development Strategy

Prepared by Apalachee Regional Planning Council

For

The Economic Development Administration

Submitted: October 2017

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