

# COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

for the  
**WITHLACOOCHEE REGION**



**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)**

**for the**

**WITHLACOOCHEE REGION**

***“A Guide to Understanding and Improving  
the Collective Economies of  
Citrus, Hernando, Levy, Marion and Sumter Counties”***

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## INTRODUCTION

The Withlacoochee Regional Planning Council (WRPC) was created in 1973 through an inter-local agreement between Citrus, Hernando, Levy, Marion and Sumter Counties. One of the eleven regional planning councils in Florida, the WRPC is an association of local governments that employs a professional planning staff to perform state mandated duties and assist local governments. Under the state enabling law (Chapter 186, Florida Statutes), regional planning councils are recognized as Florida's "only multipurpose regional entity that is in a position to plan for and coordinate intergovernmental solutions to growth-related problems on greater-than-local issues, provide technical assistance to local governments, and meet other needs of the communities in each Region" (Ch. 186.502 (4) F.S.). The By-Laws governing the activities are promulgated in Rule 29-E of the Florida Administrative Code.

The Withlacoochee Region was designated as an Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration (EDA) in 1995. Since that date, the WRPC has collaborated with EDA to promote improvement in the regional economy, functioning as the administrative agency for the Region's Economic Development District.

## ORGANIZATION

The Withlacoochee Regional Planning Council is governed by a Board of Directors which establishes the goals and policies of the Council and makes recommendations to state and local governments. Pursuant to Rule 29E-1.004 of the Florida Administrative Code, the membership of the WRPC is open to Citrus, Hernando, Levy, Marion and Sumter Counties and the municipalities located therein. Each county in the Region has a minimum of (1) representative for its first 50,000; municipalities within each county having 25,000 or more have at least (1) representative. The representative to the Council from each member local government is the elected chief representative of that respective local government. The Governor of the State of Florida appoints additional representatives to the Council from counties within the Region, equal to one-third of the total membership. The member governments and the Governor are encouraged to appoint minorities in proportion to the percentage of minorities in the Region. Meetings of the Council are open to the public and held at regular intervals (Rule 29E-1.011). Official meetings are held on the third Thursday of every month and are in accordance to the Florida Sunshine Law, Chapter 286 F.S.

## STAFF SUPPORT

Regional economic development activities are supported by a staff that is skilled in economic planning and other related fields. WRPC's professional staff assists in conducting day-to-day functions required to assure the success of regional planning activities. Duties include developing regional plan content, aiding local government compliance to state planning mandates, support for local planning initiatives, and program administration.

The WRPC staff supports the Comprehensive Economic Development Strategy (CEDS) Committee through updating and maintaining the plan document. Likewise, staff works to

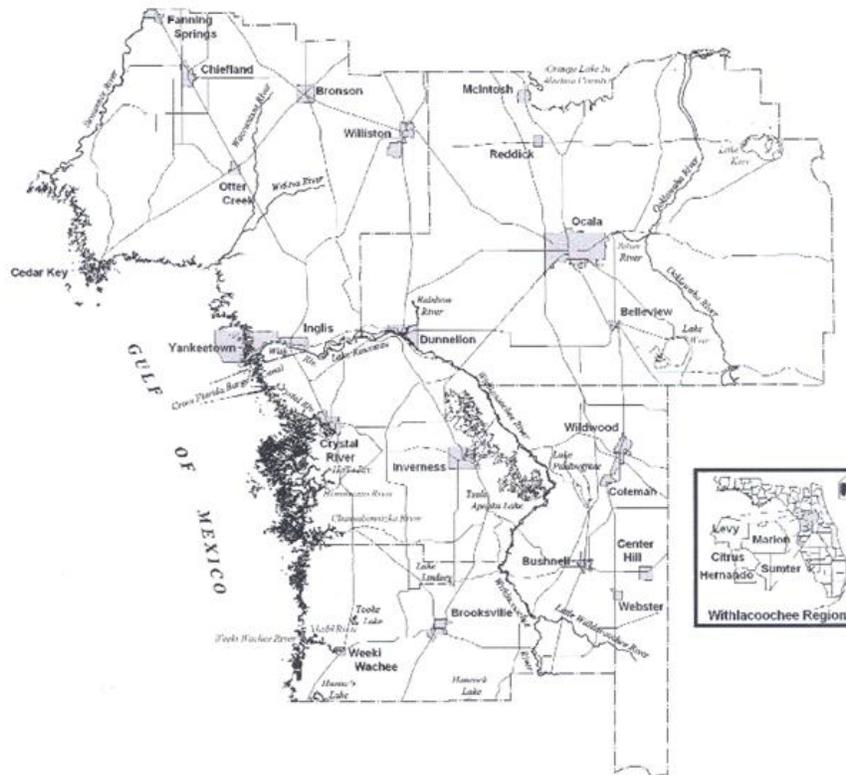


facilitate an inclusive CEDS planning process that mobilizes broad interests toward joint public and private partnership to foster greater economic development of the Region. Additionally, staff collects and analyzes information on the Region’s economy, identifying strategy options and preparing detailed project implementation plans. Finally, as guided by the Strategy Committee, staff undertakes necessary revision of the CEDS plan as needed.

## EXECUTIVE SUMMARY

The Withlacoochee Region consists of five counties in west central Florida: Citrus, Hernando, Levy, Marion and Sumter. Together the Region spans just under 8.0% of Florida’s total land area. Ocala, the county seat for Marion County, is the Region’s largest city. Recent estimates for the population of Ocala place it now over 56,000. Ocala enjoys a central location approximately 95 miles southwest of Jacksonville; 170 miles southeast of Tallahassee; 66 miles northeast of Tampa; 72 miles northwest of Orlando and 294 miles northwest of Miami. In all, the Region contains 22 cities. After Ocala, Brooksville (Hernando County), Inverness (Citrus County), and Wildwood (Sumter County), are the largest cities with 2010 Census populations of 7,719, 7,210, and 6,709, respectively. Of the remaining cities, 18 have populations under 5,000, and 10 have populations numbering less than 1,000.

FIGURE 1. MAP  
The Withlacoochee Region:  
Citrus, Hernando, Levy, Marion and Sumter Counties  
Florida



By all measures, the Region’s counties contain much of the population. Based on data from



2010, The Region has an average population density of 155 persons per square mile, although this figure doesn't describe the diversity of population density—found in the Region's unincorporated areas. Population density varies from as low as 28 persons per mile in Levy County to 293 persons per square mile in Hernando County. Population density also varies within counties due to concentrations of population located in unincorporated communities, but on balance a rural population distribution is the attribute that most characterizes the Region. As of 2010, approximately 87.0% of the Region's population resided in unincorporated areas.

Among the counties, the largest is Marion which comprises 1,663 square miles in total area or 33.1% of the Region. Next in size is Levy County consisting of 1,413 square miles or 28.2% of the Region's total area. The remaining three counties are comparatively smaller: Citrus County with 773 square miles, Hernando County measuring 589 square miles and Sumter County, the smallest, at 580 square miles. The Region's three coastal counties have a high percentage of water area ranging from 19.8% to 24.8% which exceeds the state average (18.0%); these counties have a high incidence of coastal wetlands such as estuaries and marshes. Citrus County also has a large area of inland freshwater known as the Tsala Apopka lake chain.

Table 1 presents geographic data regarding size and land/water area distribution for each county in the Region. These figures were taken from the 2011 Florida Statistical Abstract and, because of a change in methodology, vary from previously published data. The Withlacoochee Region is bounded on the northwest by the Suwannee River; on the north by Gilchrist, Alachua and Putnam Counties; on the northeast by Lake George; on the east by Volusia and Lake Counties; on the south by the Withlacoochee River and Pasco County; and on the west by the Gulf of Mexico. Citrus, Levy and Hernando Counties border the Gulf along the Nature Coast (formerly called the Big Bend) that extends northward to Apalachicola.

TABLE 1.  
MEASUREMENT OF REGION'S LAND AND WATER AREA, 2010

	Land Area	Percent Land (%)	Water Area	Percent Water(%)	Total Area	Percent of Region
<b>Citrus</b>	582	75.2%	192	24.8%	773	15.4%
<b>Hernando</b>	473	80.2%	116	19.8%	589	11.7%
<b>Levy</b>	1,118	79.1%	295	20.9%	1,413	28.2%
<b>Marion</b>	1,585	95.3%	78	4.7%	1,663	33.1%
<b>Sumter</b>	547	94.3%	33	5.7%	580	11.6%
<b>Region</b>	4,304	85.8%	714	14.2%	5,018	100.0%
<b>State (%)</b>	8.0%	----	5.9%	----	7.6%	----
<b>Florida</b>	53,625	81.5%	12,133	18.5%	65,758	----

Source: 2011 *Florida Statistical Abstract*, Table 8.03, Electronic Data Format.

Despite rapid urbanization in many parts of the Region over past decades, many areas still retain a rural character. For example, looking again at cities, 15 out of 22 cities within the Region, or 68%, can be defined as rural, having populations of less than 2,500 persons. So, economic development of the Region will face the challenge of operating in both urbanized and rural settings. Rapid change has also transformed the Region's economy from its longstanding agriculture, forestry and fishing base to one dominated by retail trade and services. This



change has led to a prevalence of low skill/low wage jobs that place prospects for increased regional prosperity in question. Nor will a service-oriented economy precipitate growth in other sectors of the economy that could create meaningful economic opportunities for workers. Historically, the Region has suffered from levels of unemployment higher than those of the state or nation. Measures of regional wealth, such as per capita income, also are notably behind state and national levels.

Rapid growth in regional population has led to increased competition for the few well-paying jobs available. The Region's recent record growth contrasts sharply with the weak foundation of its economy. Historically, the Region has outperformed Florida over the past twenty years in total population and labor force expansion, but it has lagged considerably behind state wage levels, educational attainment and income; it also has had a significant numbers of persons in poverty. Another structural fact of the regional economy is that population increase drives economic growth. The regional economy relies too much on population growth to aid sector increase. Growth in regional population directly supports the construction, utilities and real estate sectors, while consequently moving employment trends toward emphasis on the service sector, especially retail trade, over the long-term. A slowdown in population growth – given this weakness– could cause higher unemployment, poverty and social distress–easily upsetting regional growth prospects.

To no small degree, existing and future transportation infrastructure will guide the expansion of the regional economy. Many roads in the Region, such as State Road 200 in southwest Marion County and State Road 50 in Hernando County, are congested due to rapid development. However, the Region has excellent ground transportation links with other parts of Florida. Major arterials such as U.S. 19, U.S. 41, I-75, U.S. 441, and U.S. 301 pass through the Region, which also contains the northern terminus of Florida's Turnpike. Another high capacity toll road, the Suncoast Parkway, runs through Hernando County. A positive feature of the Region's transportation system is that many of its high capacity roads provide for direct east to west movement of goods and services across the state, a rarity as many limited access/high capacity transportation facilities orient along a north to south axis within the state. Although the Region contains several large airfields, scheduled passenger service is not available causing severe disadvantages for economic development at large and the growth of tourism in particular.

The Region has an abundance of natural resources, yet this natural wealth may succumb to the consequences of urbanization. Of particular value are the Region's surface waters and their related habitats: rivers, springs, lakes, estuaries, wetlands and coastal marshes. Unfortunately, in some cases, surface water quality has been diminished by the effects of development and/or inadequate infrastructure in rural, coastal and ecologically sensitive areas. A key resource is the Floridan Aquifer, the primary source of water supply, which underlies the entire Region. It is sometimes the subject of debate over proposals to withdraw and transfer groundwater for potable uses to jurisdictions outside the Region – an action that has the potential for harmful environmental and economic impacts. Significant geographic features include the Ocala National Forest, the Silver, Rainbow, Crystal River and Weeki Wachee Springs, and the Ocklawaha, Suwannee and Withlacoochee Rivers.

With over 860,000 acres of managed lands, the Region's eco-tourism industry is significant. It is vital that the integrity of these lands is maintained in order to provide the Region with abundant



natural resources and to continue to attract visitors and stimulate local economies. The Florida Greenways & Trails System Plan will support the promotion and leveraging of the Region's natural and cultural assets in a sustainable manner. The Withlacoochee Region is the home of some of the most notable trails in the State including the Cross Florida Greenway, Withlacoochee State Trail, Nature Coast State Trail, and the Sun Coast Trail.

The Region's vast forests provide timber, and are still extensively harvested. Mining – which was prominent in the late 19<sup>th</sup> and early 20<sup>th</sup> Centuries – has declined in recent years largely due to economic and environmental reasons. The Region's other great economic natural resource-based industry – commercial fishing – faces large scale disruptions and dislocations following the adoption of a ban on certain nets in Florida waters. In light of this fact, aquaculture represents the probable future of commercial fishing within the Region.

Consequently, the Region faces obstacles to economic growth:

- Lack of infrastructure
- Declining historical industries
- Limited availability of sites for industrial development
- Shortage of appropriate infrastructure to support industrial development
- Existing growth and job creation patterns skewed toward the service sector and retail trade
- Low educational attainment

Despite challenges, the Region displays many areas of strength to a higher concentration of economic activity:

- Abundant natural resources and a pristine setting
- Abundant water supply
- Access to primary federal and state highways
- Small but diverse industrial base
- Growing health care services sector
- Existing economic development organizations
- Available labor pool
- Available housing
- Ample energy supply
- Inviting climate

The CEDS has identified the areas below as those where economic development efforts might best be targeted to improve regional quality of life:

- Development of community facilities and infrastructure
- Development of industrial sites with municipal services
- Increased labor force skills
- Introduction of commercial airline service and/or airport capacity enhancement
- Better career opportunities



- Higher wages and incomes
- Economic diversity and more jobs

## REGIONAL ANALYSIS

The analysis section presents an outline of the existing conditions in the regional economy. The content of the section broadly covers a range of internal and external independent variables. The section is organized by topic within broad categories of investigation. Each variable is discussed with emphasis placed on regional trend identification. The meaning of the trend for the regional economy is then summarized in the accompanying strategic finding.

## DEMOGRAPHIC FACTORS

### POPULATION

The Withlacoochee Region has experienced tremendous population growth over the past thirty years. As administered every decade, the U.S. Census has charted this increase. The Region's population expanded from 265,802 in 1980 to 779,533 in 2010, a gain of 193.3%. Growth in the Region outpaced Florida, which grew by 92.9% during the same period. Population growth in the Region has primarily been caused by two main factors: 1) selection of the Region by older adults as a retirement location and 2) in-migration from other parts of Florida. Table 2A summarizes census population data.

TABLE 2A.  
WITHLACOOCHEE REGION'S HISTORICAL POPULATION (1980-2010)

	<i>Population Estimates</i>				<i>Percent Change</i>			
	1980	1990	2000	2010	1980-1990	1990-2000	2000-2010	1980-2010
<b>Citrus</b>	54,703	93,515	118,085	141,236	70.9%	26.3%	19.6%	158.2%
<b>Hernando</b>	44,469	101,115	130,802	172,778	27.4%	29.4%	32.1%	288.5%
<b>Levy</b>	19,870	25,923	34,450	40,801	30.5%	32.9%	18.4%	105.3%
<b>Marion</b>	122,488	194,833	258,916	331,298	59.1%	32.9%	28.0%	170.5%
<b>Sumter</b>	24,272	31,577	53,345	93,420	30.1%	68.9%	75.1%	284.9%
<b>Region</b>	265,802	446,963	595,598	779,533	68.2%	23.5%	30.9%	193.3%
<b>State (%)</b>	2.73%	3.50%	3.73%	4.15%	----	----	----	----
<b>Florida</b>	9,746,961	12,937,926	15,982,378	18,801,311	32.7%	23.5%	17.6%	92.9%

\*Figures Rounded

Source: U.S. Census, 1980, 1990, 2000, and 2010.

For those years between the censuses, the US Census Bureau creates estimates of population drawing on the decennial population survey as well as other available data sources. Within the state of Florida, the University of Florida's Bureau of Economic and Business Research (BEBR) runs a population estimation program to provide accurate population data for the state. The University of Florida's research effort produces population estimates that enhance census population findings within the context of the state. Under state law, BEBR data serves as the official, definitive source of population information. The state of Florida, the legislature's Office of Economic and Demographic Research (EDR), and local governments all use BEBR data.



TABLE 2B.  
RECENT REGIONAL POPULATION ESTIMATES AND  
2015 POPULATION PROJECTION

	Population Estimates			Percent Change			State Rank	
	2010	2012	2015	2010-2012	2012-2015	2010-2015	By 2010 Pop.	Chg. By (%)
<b>Citrus</b>	141,236	142,002	150,876	0.54%	6.25%	6.83%	32 of 67	29 of 67
<b>Hernando</b>	172,778	175,250	190,775	1.43%	8.86%	10.42%	27 of 67	14 of 67
<b>Levy</b>	40,801	41,063	43,625	0.64%	6.24%	6.92%	45 of 67	28 of 67
<b>Marion</b>	331,298	335,697	362,992	1.33%	8.13%	9.57%	15 of 67	17 of 67
<b>Sumter</b>	93,420	99,902	111,036	6.94%	11.14%	18.86%	36 of 67	3 of 67
<b>Region</b>	779,533	793,914	859,304	1.84%	8.24%	10.23%	-----	-----
<b>State(%)</b>	4.15%	4.16%	4.30%	-----	-----	-----	-----	-----
<b>Florida</b>	18,801,310	19,073,170	19,974,411	1.45%	4.73%	6.24%	-----	-----

\*Figures Rounded

Source: BEBR: Total County Population: April 1, 1970 - 2030.

BEBR: *Florida Demographic Estimating Conference, July 2011 and the Florida Demographic Database, January 2012.*

Florida Legislature Office of Economic and Demographic Research (EDR) Population Database (2012).

Table 2B estimates a regional population of 793,914 for 2012 and projects a population of 859,304 for 2015. Population growth within the Region has been stronger than that seen elsewhere in the state. All counties within the Region are projected to outperform state population growth for the period of 2010 to 2015. Sumter County, in particular, showed strong population growth, is ranked third in the state of highest projected percent change in population between 2010 and 2015, and has been ranked as among the fastest growing counties in the nation. In counties other than Sumter County, growth rates have slowed from the boom years of previous decades. However, long term strategies should recognize the Region as a potential future growth area.

However, the rapid growth of the past three decades must be put into perspective by noting the Region's small share of total state population: 3.7% in 2000 and 4.2% in 2010. The growth must also be viewed relative to the regional population. In 1970, the population was considerably smaller than in 2000 so that a smaller numerical increase would translate into a larger percentage of growth. For example, from 1970 to 1980, the Region grew by 100.1%, a numerical increase of 132,977 persons, but from 1980 to 1990, although the Region grew by more people (181,161), it translated into a smaller percentage (68.9%) relative to current total population. This relationship carries forward as the total amount of in-migration by number is less than numbers elsewhere in the state, although it is quite high in percentage terms (See Table 2B above).

**STRATEGIC FINDING: Population growth continues as the consistent regional pattern, matching historical trends. While the Region's population growth rate continues to exceed the state's total growth rate, it is unclear whether this pattern can persist. Slowing population growth would reduce demand for those industries directly linked to in-migration: construction, real estate, and segments of the utilities sector, etc. All would be negatively affected. Such a change would also harm the Region's retail trade**



and service sectors as these areas depend on population increase to support both consumption and demand. Traditionally, the regional economy relies on the sectors associated with population growth as a key support, but the prospect of changing population growth emphasizes the need to diversify the regional economic base. This course of action would fortify the regional economy against risks associated with concentrating business activity around population growth.

AGE

Table 3A lists population by age group as measured for 2010 by BEBR. Above all, the Region is characterized by an aging population. All counties in the Region have a percentage of persons over age 65 in excess of the state average. Likewise, all counties in the Region have less individuals, by percentage, in the categories of adults aged 18-34 and 35-54. This is especially significant because these groups of adults (i.e., cohorts between 18 to 54) are most likely to participate as full time, permanent workers in the labor force. Only in the category of adults aged 55-64 does the Region have a surplus of work age adults when compared to the average state percentage. Unfortunately, this category begins to reflect retired individuals as well. Given the Region's prominence as a retirement destination, it's unlikely a high percent of individuals in this category desire to work full time. Thus, a surplus here does not necessarily constitute a gain for the labor pool. In-line with the observed trend, the Region has a correspondingly large percentage of the population over the age of 65.

In addition, the median age in the Region has increased. Table 3B shows median age distribution among the Region's population over the recent past and projected to 2040. Between 2000 and 2005, the median age for the Region increased by 0.6 years. All counties in the Region saw their median age increase during this period. The trend continued through 2010, increasing by 3.5, but current projections indicate a slight decrease in median age into the future.

TABLE 3A.  
REGION'S POPULATION BY AGE GROUP, 2010

	Age 0-17	(%)	Age 18-34	(%)	Age 35-54	(%)	Age 55-64	(%)	Age 65+	(%)
<b>Citrus</b>	22,394	15.9%	17,886	12.7%	32,414	23.0%	23,501	16.6%	45,041	31.9%
<b>Hernando</b>	34,158	19.8%	26,820	15.5%	42,806	24.8%	24,471	14.2%	44,523	25.8%
<b>Levy</b>	8,629	21.1%	7,170	17.6%	10,784	26.4%	6,304	15.5%	7,914	19.4%
<b>Marion</b>	64,181	19.4%	55,552	16.8%	80,246	24.2%	46,001	13.9%	85,318	25.8%
<b>Sumter</b>	8,512	9.1%	9,886	10.6%	16,047	17.2%	18,445	19.7%	40,530	43.4%
<b>Region</b>	137,874	17.7%	117,314	15.0%	182,297	23.4%	118,722	15.2%	223,326	28.6%
<b>Florida</b>	4,002,091	21.3%	4,029,202	21.4%	5,172,747	27.5%	2,337,668	12.4%	3,259,602	17.3%

Source: 2010 Florida Statistical Abstract, Table 1.34, Electronic Data Format.

TABLE 3B.  
REGIONAL MEDIAN AGE PROJECTION TO 2040

Area	2000	2005	2010	2020	2030	2040	Change
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							2000-2040 (Years)
<b>Citrus</b>	52.6	53.5	54.0	56.9	57.9	56.4	3.8
<b>Hernando</b>	49.5	49.4	47.7	49.0	49.0	49.5	0.0
<b>Levy</b>	41.1	42.4	45.0	46.7	46.9	47.2	6.1
<b>Marion</b>	43.8	45.1	47.3	49.6	49.6	49.5	5.7
<b>Sumter</b>	49.2	48.7	62.7	66.7	65.2	62.2	13.0
<b>Region</b>	47.2	47.8	51.3	53.8	53.7	53.0	5.8
<b>Florida</b>	38.7	39.7	40.7	41.8	42.5	43.0	4.3

Source: 2001 *Florida Statistical Abstract*, Table 1.38, p. 36.

2006 *Florida Statistical Abstract*, Table 1.51, p. 47.

2011 *Florida Statistical Abstract*, Table 1.51, Electronic Data Format.

**STRATEGIC FINDING: More persons over age 65, coupled with a lower than normal work age population may cause problems within the regional local labor market. Employers appear to have difficulty attracting younger workers. A shortage of younger, high skill workers will not aid the firm development in new and emerging industries within the Region. Efforts to better involve retirees in the Region’s workforce could function as an intermediate, local solution and should be supported. But consumption habits of a concentrated elderly population will increase the demand for service and retail trade activity, reinforcing the Region’s already pronounced bias toward service sector job creation. Clearly, a shortage of young workers means workforce development and coordinated efforts to attract and retain a balanced work age population should be prioritized by regional economic development efforts.**

## EDUCATION

The educational attainment profile of the Region improved for the period between 2000 and 2010. Achievement in 8<sup>th</sup> Grade Math FCAT is examined in the Region and state (see Table 4A and 4B). Table 4C summarizes the educational attainment of persons aged 25+ for the Region circa 2010. The reader is cautioned that the data indicate the highest educational level achieved. Therefore, the total number of high school graduates for persons aged 25+ would be the sum of the columns "High School Graduates," "Some College" and "College Graduates." Table 4D shows high school graduation rates in the Region and state.

Basic educational attainment showed strength over much of the Region. For instance, high school graduation gained over this period (37.2% in 2000 to 37.5% in 2010). The Region had more high school graduates (37.5%) than the state (30%) in 2010 in the percentage of persons whose highest educational achievement was only a high school diploma. Most of the Region continues to parallel the state in high school educational attainment. Since 2000, FCAT scores have remained in-line with state averages, and the Region had a 4 year high school graduation rate similar to the state average. Below is a table of 8<sup>th</sup> Grade FCAT Math Achievement levels in 2012. The regional and county-level percentages of students in Achievement Levels 3 and above are similar to state levels.

TABLE 4A.  
REGION’S 8TH GRADE MATH FCAT ACHIEVEMENT, 2012



Area	# Of Test-Takers	% In Achievement Level 3 Or Above	# In Achievement Level 3 Or Above
<b>Citrus</b>	1,182	63	745
<b>Hernando</b>	1,716	54	927
<b>Levy</b>	415	58	241
<b>Marion</b>	3,037	51	1,549
<b>Sumter</b>	553	62	343
<b>Region</b>	6,903	55	3,804
<b>Florida</b>	194,346	57	110,777

Source: Florida Department of Education, Bureau of K-12 Assessment.

TABLE 4B  
EIGHTH GRADE MATH PERFORMANCE- PERCENT OF STUDENTS SCORING AT OR ABOVE LEVEL 3 OF 5 ON FCAT IN WITHLACOOCHEE REGION AND STATE, 2001 TO 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Citrus</b>	64%	66%	64%	63%	60%	62%	67%	73%	72%	75%
<b>Hernando</b>	47%	42%	38%	43%	45%	47%	48%	60%	59%	59%
<b>Levy</b>	68%	66%	69%	68%	71%	68%	71%	71%	68%	71%
<b>Marion</b>	61%	57%	57%	58%	58%	57%	61%	65%	62%	64%
<b>Sumter</b>	54%	46%	53%	56%	54%	63%	67%	73%	69%	68%
<b>Region</b>	62%	59%	60%	60%	61%	61%	64%	68%	66%	68%
<b>Florida</b>	55%	53%	56%	56%	59%	60%	63%	67%	66%	68%

Source: Florida Department of Education, Florida Comprehensive Assessment Test.

<<https://app1.fldoe.org/FCATDemographics/Selections.aspx?reportTypeID=1&level=District&subj=Math>>.

The percentage of persons with post high-school education showed parallel increase. The data for 2010 indicates 47.4% of the population aged 25+ either had some college (including Associates Degrees) or had obtained a college degree (Bachelor's or higher) compared to 40.0% in 2000. While the educational attainment levels in the Region have increased significantly over the past ten years, the regional percentage of persons with college experience continued behind the state's figure of 55.5%. Locally, community colleges provide the Region's residents access to post-secondary education and career training.

TABLE 4C.  
REGION'S EDUCATIONAL ATTAINMENT, 2010

Population 25 Years And Over	Less Than 9th Grade	9th To 12th Grade, No	High School Graduate	Some College	College Graduate
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			Diploma			
<b>Citrus</b>	110,707	5,425	11,403	43,286	32,437	18,045
<b>Hernando</b>	126,626	4,559	13,802	47,865	40,014	20,387
<b>Levy</b>	29,052	1,365	3,980	10,778	9,209	3,690
<b>Marion</b>	242,147	11,865	25,668	89,110	73,855	41,649
<b>Sumter</b>	78,309	2,897	8,066	28,896	22,161	16,288
<b>Region</b>	586,841	26,111	62,919	219,935	177,677	100,059
<b>Region (%)</b>	100.0%	4.4%	10.7%	37.5%	30.3%	17.1%
<b>Florida</b>	12,931,148	750,007	1,137,941	3,879,344	3,853,482	3,323,305
<b>State (%)</b>	100.0%	5.8%	8.8%	30.0%	29.8%	25.7%

Note: "Some College" includes Associates degrees. "College Graduate" includes Bachelor's degrees and higher.  
Source: U.S. Census, 2008-2010 American Community Survey 3-Year Estimates.

TABLE 4D  
HIGH SCHOOL GRADUATION RATES: WITHLACOOCHEE REGION AND STATE,  
SCHOOL YEARS 2001-02 TO 2010-11

Area	School Year									
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Citrus</b>	71.2%	67.5%	68.8%	69.6%	69.8%	68.2%	68.3%	77.1%	76.6%	78.1%
<b>Hernando</b>	52.1%	74.7%	70.5%	76.1%	69.5%	70.7%	75.4%	78.4%	71.1%	73.3%
<b>Levy</b>	74.3%	73.1%	75.6%	74.7%	67.4%	74.1%	77.6%	87.8%	88.5%	87.2%
<b>Marion</b>	68.9%	66.2%	66.3%	63.5%	70.0%	70.5%	66.5%	72.0%	69.0%	78.2%
<b>Sumter</b>	72.1%	48.1%	43.1%	45.9%	43.9%	53.3%	56.1%	64.2%	63.4%	67.6%
<b>Region</b>	70.1%	66.7%	67.2%	68.3%	67.2%	68.2%	68.9%	77.2%	76.5%	78.3%
<b>Florida</b>	67.9%	69.0%	71.6%	71.9%	71.0%	72.4%	75.4%	78.6%	80.7%	81.2%

Source: Florida Department of Education, Data Publications and Reports: Students  
[www.fldoe.org/eias/eiaspubs/pubstudent.asp](http://www.fldoe.org/eias/eiaspubs/pubstudent.asp)

**STRATEGIC FINDING:** Although recent progress is encouraging, to benefit the Region's economy, increased regional educational attainment must be shown to connect to higher regional competitive advantage. However, because improvements in regional education levels will likely correlate to future economic success, continued focus on workforce educational attainment needs to be applied as a prerequisite to further diversification of sector types in the regional economy. As a consequence of improvements at the high school level, emphasis relating the intersection of education and economic development—should shift to post-secondary opportunities. Over the long-term, better educational options after high school will promote diversification of the regional economy, leading to new sector growth. As a consequence of this fact, support for career development opportunities should figure highly into regional economic development efforts.



PERSONAL INCOME

Total personal income data from the U.S. Department of Commerce, Bureau of Economic Analysis indicates the relative capacity to create wealth within an area. This statistic includes the earnings (wages and salaries, other labor income, and proprietor's income); dividends, interest, and rent; and transfer payments received by an area's residents. Results for the Region are presented in Table 5.

TABLE 5.  
TOTAL PERSONAL INCOME\* 1980, 1990, 2000, & 2009 (IN THOUSANDS OF DOLLARS)

	1980	1990	2000	2009	(%) Regional Income 2009	Increase 1980- 2000	Increase 1990 - 2000	Increase 2000- 2009
<b>Citrus</b>	338,000	1,302,000	2,551,000	4,382,482	19.0%	654.7%	195.9%	71.8%
<b>Hernando</b>	291,000	1,434,000	3,014,000	5,128,367	22.2%	935.7%	110.2%	70.2%
<b>Levy</b>	113,000	304,000	621,000	1,015,680	4.4%	495.6%	104.3%	63.6%
<b>Marion</b>	855,000	2,721,000	5,780,000	10,216,751	44.2%	576.0%	112.4%	76.8%
<b>Sumter</b>	144,000	389,000	778,000	2,350,557	10.2%	440.3%	100.0%	202.1%
<b>Region</b>	1,741,000	6,150,000	12,744,000	23,093,837	100.0%	631.9%	107.2%	81.2%
<b>Florida</b>	88,693,000	241,836,000	445,740,000	722,328,176	NA	402.6%	184.3%	62.1%

\*All total personal incomes are in thousands of dollars and may not sum exactly due to rounding.

Source: 2002 Florida Statistical Abstract, Table 5.14, p. 190.

Florida Statistical Abstract 2011. Table 5.14, Electronic Data Format.

Florida Statistical Abstract 1992. Table 5.14, p. 150-151.

Florida Statistical Abstract 1982. Table 5.13, p. 154-155.

From 1980 to 2000, total personal income in the Withlacoochee Region increased by 631.9%, while state total personal income increased by 402.6%. The fastest growing counties in the Region were Citrus and Hernando with increases of 654.7% and 935.7%, respectively. Personal income continues to grow in the Region. However, aside from Sumter County, growth continues at a slower rate than the previous decades. That said, even as regional income rises, the increase is still well below state average total personal income growth for the identical period.

Marion County remained the dominant county with 44.2% of regional total personal income. Together, Citrus and Hernando produce the second largest share of regional income, roughly equaling Marion County's percentage. These three counties generate an amount of personal income slightly in excess of their percentage of regional population. Oppositely, Levy and Sumter Counties produce an amount of income less than their share of the regional population. Levy County accounts for 5.2% of the population but has 4.4% of total regional personal income. The effect is also noticeable in Sumter County which has 12.0% of the population and yields only 10.2% of the Region's total personal income.

**STRATEGIC FINDING:** Individual income, as measured by total personal income growth, has made significant gains as compared to the recent past. Regional incomes now are multiples of what they were previously. Even with improvement, regional total personal



**income varies over time. Inability to sustain income growth points toward weakness in regional wages, and this is inconsistent with the rising prosperity of the state at large.**

MEDIAN INCOME

Median family income is a measure of wealth distribution and relative prosperity. Table 6 presents data for median family income from the last three full census periods (census surveys of income are carried out one year prior to the decennial population survey). Over time, median incomes within the member counties of the Region have changed considerably. In 1989, Marion County had a narrow edge over Hernando County for highest median income within the Region. By 1999, Hernando again established the lead over all other counties in the Region. However, by 2010, Sumter County gained a solid lead in the Region that corresponded with substantial population growth. Levy County has consistently had the lowest median income levels.

In nominal terms, all the counties except Sumter in 2010 were significantly beneath the state's median family income, a disparity that persisted from 1979 to 2010. The gap—as measured in dollars—between the state median income and the regional median income historically had been quite large, indicating that the Region is not only poorer than the state, but that the state was growing wealthier at a faster pace than the Region. This trend has changed within the past decade, as the State's median family income grew at a much slower rate than previous decades.

This observation is reinforced when median income is examined by percentage change. From 1979 through 1989, the Region had a percentage change less than the state's but by a margin less than one percentage point. Over the next ten years, median income in the Region grew at a rate of 8.4% behind aggregate median income growth in the state. From 1999 to 2010, median income in the Region grew at a rate twice that of the aggregate median income growth in the state. Between 1999 and 2010, income in the state increased by 21.1% as compared to an increase of 42.7% in the Region as a whole.

TABLE 6.  
MEDIAN FAMILY INCOME OF REGION, 1989, 1999 & 2010 (IN DOLLARS)

	1979	1989	1999	2010	Percent Change 1989--1999	Percent Change 1999--2010
Citrus	13,009	24,465	31,001	44,617	26.7%	43.9%
Hernando	13,933	25,685	37,509	47,681	46.0%	27.1%
Levy	12,464	22,743	30,899	42,184	35.9%	36.5%
Marion	13,440	26,089	31,944	45,242	22.4%	41.6%
Sumter	13,318	23,687	32,073	53,435	35.4%	66.6%
Region	13,233	24,534	32,685	46,632	33.2%	42.7%
Florida	17,316	32,212	45,625	55,235	41.6%	21.1%

Source: U.S. Census: 1990, 2000, and 2010.

**STRATEGIC FINDING:** As compared to the state, relatively weak regional median income suggests the wage scale is skewed toward low paying job opportunities with little chance of advancement. Median income shortfall is yet another indicator that regional incomes



are far less than they could be under a best case scenario. Economic development presents one vehicle to address suppressed incomes within the Region. To respond effectively, economic development efforts should target preference to those industries that pay wages above the median wage rate. In summary, the shortfall in regional median income—compared to the state—underscores the importance of economic development insofar as it explicitly addresses the regional income gap.

PER CAPITA INCOME

To date, the Region remains behind state and federal per capita income figures. Per capita income (total income divided by total population) indicates the relative wealth of the population, although it does not show the economic disparities within the Region’s population. So, any relative deficit or surplus in per capita income is very telling about concentration of wealth in a location.

Table 7 gives per capita Income for 1989 and 1999. More recent data has been added to the table to facilitate trend identification. The table demonstrates significant growth in per capita income from 1989 to 1999, although much of it occurred during the 1970s due to the high inflation rates of that decade. The growth in per capita income from 1989 to 1999 in the Region exceeded the state. In 2010, Sumter County had the highest per capita income in the Region, followed by Citrus and Marion Counties. The per capita incomes for Levy County has remained significantly lower, a sign of intra-regional disparity.

Average per capita income for the Region constituted 79.6% of the national average per capita income in 2010 and 84.2% the state per capita income level that same year. Per capita income grew between the years of 1999 and 2010, with the regional rate of growth 6.1 percentage points higher than what was experienced statewide. Sumter County experienced phenomenal growth, 24.3%, more than twice the rate of the state, 18.2%. While Sumter County is still behind the state and national per capita income figures, it is closer than any other county in the region, at 97.5% and 92.2% of the state and nation, respectively. While Levy County had the second highest increase in per capita incomes from 1999 to 2010 (only behind Sumter), it remains the lowest in the Region and at a substantial margin, at 70.8% and 67.0% of the state and national average, respectively.

TABLE 7.  
REGIONAL PER CAPITA INCOME (IN DOLLARS)

	1989	1999	2010	Percent Change (1999-2010)
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Citrus	12,151	18,585	21,760	17.1%
Hernando	11,864	18,321	21,082	15.1%
Levy	9,386	14,746	18,044	22.4%
Marion	11,782	17,848	21,562	20.8%
Sumter	9,920	16,830	24,842	47.6%
Region	11,021	17,266	21,458	24.3%
Florida	14,698	21,557	25,482	18.2%

Source: U.S. Census, 1990, 2000, 2010.

**STRATEGIC FINDING:** Like median income inequality, the gap between regional per capita income and state and national levels have proven constant. The Region is well behind state and national per capita income numbers, and income growth in the Region is notably slower than the state as a whole. Economic development can address this shortfall by striving to attract higher paying jobs. Therefore, increase in regional wage rates should be counted as an important element of strategic economic development planning. Any increase in regional wages will have positive effects throughout the Region due to anticipated increase in consumption.

#### LABOR FORCE

The civilian labor force in the Withlacoochee Region grew significantly from 1980 to 2000. In 2000, the U.S. Census recorded a regional civilian labor force of 209,200 persons, an increase of 135.2% from 1980. The Region's growth in labor force outpaced both regional population increase (124.7%) and the state labor force growth (75.6%), during the same period. The fastest growing area was Hernando County, where the labor force increased by 220.0% from 1980 to 2000. Citrus County was next, with 148.0%, and Marion County trailed at 123.4%. However, from 1990 to 2000, the labor force throughout the Region declined from 37.7% to 35.1% of total population. Slow growth in labor force participation rates are indicative of the Region's higher median age. That trend has since reversed somewhat since 2000 with the regional labor force participation rate increasing parallel to the trend in the state as a whole, but the Region's labor force participation rate is still visibly less than the state average. Sumter is the only county in the Region that has experienced a continuous decrease in labor force participation rates.

TABLE 8.  
REGIONAL (CIVILIAN) LABOR FORCE PARTICIPATION RATES (1980-2010)

	1980	% Of Population	1990	% Of Population	2000	% Of Population	2010	% Of Population
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		Working (1980)		Working (1990)		Working (2000)		Working (2010)
<b>Citrus</b>	16,779	30.7	32,018	34.2	38,837	32.9	53,592	37.5%
<b>Hernando</b>	14,528	32.7	34,262	33.8	44,071	33.7	70,461	41.9%
<b>Levy</b>	7,291	36.7	10,282	39.7	12,935	37.5	17,058	44.9%
<b>Marion</b>	46,567	38.0	80,308	41.1	98,248	37.9	139,334	44.1%
<b>Sumter</b>	9,251	38.1	11,855	37.5	15,109	28.3	24,609	26.1%
<b>Region</b>	94,416	35.5	168,725	37.7	209,200	35.1	305,054	41.03%
<b>Florida</b>	4,217,665	43.2	6,167,236	47.7	6,995,047	43.7	9,215,573	54.1%

Source: U.S. Census 1980, 1990, 2000, 2010.

Although Marion County, the chief trade center of the Region, remained dominant in terms of labor force size, rapid growth elsewhere in the Region diminished this lead over the past two decades. In 1980, Marion County contained almost half 49.3% of the Region's labor force. This share fell to 47.0% in 2000 and by 2010 had reached 45.7%. However, the Marion County labor force is still larger than that of any two of the other counties in the Region combined. Table 8 presents civilian labor force data for the census years 1980, 1990 and 2000 and is updated with current labor force participation rates.

**STRATEGIC FINDING:** While a flat labor force participation rate could show weakness in job creation, when contrasted against regional population growth, it also speaks to the skew toward retirees and an older population in general. Regardless, decreasing labor force participation is a worrying development for overall regional productivity. In either case, economic development activity can seek to reverse this pattern by preferencing those strategic activities that promote job creation and job retention to preempt the emerging trend.

#### SOURCES OF INCOME

Although total personal income increased astronomically from 1980 to 2009, a study of its components reveals an interesting observation of the regional economy: (1) the high incidence of transfer payments caused by a large retired population and, (2) regional income is no longer generated primarily by private sector earnings. And it's a trend that appears to be gaining strength. Specifically, in 2006, *Florida Trend Magazine* identified Sumter County as the top county statewide for highest percentage of transfer payments at 38% for 2006, and was the second highest in 2009.

Looking at the recent past, the contribution of transfer payments to the regional economy is far higher than what is typical of the state. Transfer payments are, generally, pension and retirement payments as well as unemployment benefits. High levels of transfer payments tend to promote the retail trade and services sectors of the economy through purchase of goods and services required to maintain quality of life. Given the large retired population in the Region, it is not surprising that transfer payments accounted for 32.3% of total personal income in the Region in 2009. By comparison, transfer payments accounted for only 19.1% of Florida's total personal income in 2009. Table 9A shows transfer payments as a percent of total personal income from 1980 to 2009.



Private sector, non-farm earnings are the incomes generated by private businesses of all types, excluding farms. Its decline, as a percentage of total personal income, is a troubling sign of the diminished relative importance of private sector employment as the primary producer of income. In 1990, the private sector generated 36.6% of the Region's income; by 2009, it declined to 31.3%. The state's percentage increased slightly from 1990 (51.2%) to 2000 (52.2%), but, in 2009, private sector, non-farm earnings as a percentage of total state income decreased to 49.4%. Table 9B shows earned income as a percent of total personal income from 1990 to 2009.

TABLE 9A.  
TRANSFER PAYMENTS AS A PERCENTAGE OF  
TOTAL PERSONAL INCOME IN REGION (1990-2009)

	1990	2000	2009
Citrus	28.7%	28.2%	33.3%
Hernando	27.0%	27.3%	33.5%
Levy	26.4%	25.6%	32.8%
Marion	23.9%	22.7%	29.5%
Sumter	29.8%	27.8%	39.9%
Region	26.1%	25.3%	32.3%
Florida	16.3%	15.1%	19.1%

Source: *Florida Statistical Abstract 2002*. Table 5.39, p. 221.  
*Florida Statistical Abstract 1992*. Table 5.39, p. 180-181.  
*Florida Statistical Abstract 2011*, Table 5.37, Electronic Data Format.

TABLE 9B.  
PRIVATE SECTOR, NON-FARM EARNINGS AS A  
PERCENTAGE OF TOTAL PERSONAL INCOME IN REGION (1990-2009)

	1990	2000	2009
Citrus	35.4%	32.1%	32.0%
Hernando	27.4%	26.8%	26.6%
Levy	28.1%	26.9%	24.6%
Marion	44.4%	39.2%	35.4%
Sumter	27.1%	23.8%	25.7%
Region	36.6%	33.3%	31.3%
Florida	51.2%	52.2%	49.4%

Source: *Florida Statistical Abstract 2002* Table 5.34, p. 218-219.  
*Florida Statistical Abstract 1992*. Table 5.34, p. 173-174.  
*Florida Statistical Abstract 2011*. Table 5.34, Electronic Data Format.

**STRATEGIC FINDING:** The balance between transfer payments and wages is shifting toward the former within the Region. This change will continue to push the regional economy toward the service and retail trade sector, because transfer payments correspond with higher levels of personal consumption. In effect, an increase in transfer payments works to substitute for wage growth in the regional economy. In-migration of retirees accounts for this phenomenon. If this trend were to cease, regional income would precipitously decline. Again, regional economic development should explicitly promote job creation to reverse decline in wages as a source of income within the Withlacoochee Region and to attract skilled workers to the regional labor pool.



## PRIVATE SECTOR NON-FARM INCOME AND WAGES

Private sector, non-farm earnings reflect employment by industrial sector in the Region. In 2009, approximately 60.49% of private sector earnings came from the services and retail trade sectors combined, up from 52.5% in 2004. (This figure could be even higher as some services and retail trade income information was withheld to protect individual firms.) Individually, the services sector generated about 47.13% of personal earnings while the retail trade sector accounted for 13.36%. Manufacturing continues to decline from 9.9%, in 2004, to 7.6% in 2009. Construction in the Region has outpaced the state for the past two decades. The housing boom of 1990s accounted for the significant growth in the construction from 11.3% in 1990 to 13.5% in 2000. However, since 2004, Construction has decreased significantly to 9.59% of regional wages, well under 1990 values. Table 10 summarizes.

(Note: income data discussed in this sub-section was from the U.S. Department of Commerce, Bureau of Economic Analysis and is not comparable with Census income data discussed in other sub-sections).



TABLE 10.  
PRIVATE, NON-FARM PERSONAL INCOME BY INDUSTRIAL SECTOR, 2009  
(IN 1000s DOLLARS)\*

	Private Non-Farm Earnings	Manufac Turing	Mining	Retail Trade	Construc Tion	Finance Insurance Real Estate	Transportation Information Public Utilities	Services	Wholesale	Forestry And Fishing
<b>Citrus</b>	1,403,630	24,544	3,170	165,482	115,628	63,975	24,159	758,355	40,241	2,217
<b>Hernando</b>	1,364,052	58,073	Data Withheld	205,235	104,010	73,670	112,876	762,727	40,966	Data Withheld
<b>Levy</b>	250,225	17,176	Data Withheld	41,971	33,088	18,521	3,547	82,692	11,095	Data Withheld
<b>Marion</b>	3,614,864	392,607	7,767	467,387	353,616	315,690	247,688	1,576,003	196,621	57,485
<b>Sumter</b>	604,894	57,908	2,678	86,795	87,622	30,243	29,723	231,015	Data Withheld	1,970
<b>Region</b>	7,237,665	550,308	13,615	966,870	693,964	502,099	417,993	3,410,792	288,923	61,672
<b>(%) Region</b>	100.00%	7.60%	0.19%	13.36%	9.59%	6.94%	5.78%	47.13%	3.99%	0.85%
<b>Florida</b>	356,713,009	22,934,034	658,902	33,185,039	26,142,275	37,842,112	29,893,065	180,187,019	24,408,596	1,461,967
<b>(%) State</b>	2.03%	0.15%	0.00%	0.27%	0.19%	0.14%	0.12%	0.96%	0.08%	0.02%

Note: Percentages calculated WRPC.

Source: *Florida Statistical Abstract 2011*. Table 5.34, Electronic Data Format.

\*Data withheld when information disclosure would compromise a specific firm's privacy.



**STRATEGIC FINDING:** The Region’s economy continues to be dominated by the service and retail trade sectors. Manufacturing remains important, but now accounts for a reduced percentage of the Region’s income. Construction has replaced manufacturing as the third most important source of regional income. Growth in construction, retail and service sectors tie to established patterns of expansion activity accompanying population growth. If regional population growth patterns change, and demand for service and retail trade sector goods correspondingly fall, then the Region’s economic base would be very vulnerable. Therefore, analysis of regional wages and income gives further proof that economic development efforts should support diversification of the economic base.

**AVERAGE WAGE LEVELS**

Bureau of Economic Analysis data for 2009 shows lower average per job earnings in the Region versus the state of Florida or the nation. Regional average earnings per job are \$32,623. This figure amounts to only 64.4% the national level and 73.3% of average earnings for the state. In 2009, the counties of the Region had average earnings per job ranging from \$27,888 to \$38,615. Viewing the difference between average regional wage levels and the state’s average wage in dollars serves to illustrate the disparity between regional wages and wages in the state, generally. More than \$11,000 annual difference exists between the typical wages in the Region versus the state.

From 2004 to 2009, an increase in earnings per job appeared as the notable trend for the Region. No county showed a rate of earnings growth that exceeded the Florida average. Citrus and Sumter counties made impressive gains in dollar terms. Hernando, Marion, and Levy Counties underperformed, falling behind both the Region and the state in percentage increase. However, Marion remains the only other county (besides Sumter) whose average earning exceeds the Region’s. Sumter County is the outlier with earnings per job above 86% of average state level. Table 11 details recent earnings data.

TABLE 11.  
EARNINGS PER JOB, 2009 (IN DOLLARS)

	Average Wage And Salary Earnings Per Job, 2004	Average Wage And Salary Earnings Per Job, 2009	Percent (%) Increase 2004-2009
Citrus	27,194	32,177	18.3%
Hernando	27,312	30,291	10.9%
Levy	25,708	27,888	8.5%
Marion	30,570	34,144	11.7%
Sumter	31,986	38,615	20.7%
Region	28,554	32,623	14.3%
Florida	38,706	44,490	14.9%

Source: Florida Statistical Abstract 2011. Table 6.03, Electronic Data Format.

**STRATEGIC FINDING:** Lower than average earnings per job is more evidence to support the observation that an income gap exists for the regional economy relative to outside economies. It shows wages do not reflect the benefits of regional competitive



advantage. Consequently, economic development efforts need to focus on promoting job growth targeted at sectors of the economy that will pay above average wages, such as value-added manufacturing, to reverse this trend. Economic development efforts should also focus on trying to find ways for regional competitive advantage to better translate into increased wages. Any job retention efforts undertaken should look at wages as a determinant factor.

## UNEMPLOYMENT

Historically, the Withlacoochee Region has been plagued by chronically high unemployment, and the Region's minority and young adult populations have suffered disproportionately. During the 1970's and 1980's, the Region's unemployment almost always exceeded the state's level.

TABLE 12.  
HISTORICAL, ANNUAL UNEMPLOYMENT RATES BY PERCENT

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>Citrus</b>	6.6%	6.2%	5.4%	4.2%	3.7%	4.9%	8.1%	11.9%	12.7%	11.9%
<b>Hernando</b>	6.8%	6.3%	5.6%	4.8%	4.4%	5.6%	8.5%	13.0%	14.2%	13.4%
<b>Levy</b>	5.8%	5.3%	4.6%	3.7%	3.5%	4.1%	7.0%	11.2%	12.0%	11.3%
<b>Marion</b>	5.9%	5.4%	4.6%	3.7%	3.4%	4.4%	7.8%	12.5%	13.4%	12.3%
<b>Sumter</b>	5.8%	5.2%	4.5%	3.3%	2.7%	3.4%	5.6%	9.0%	9.8%	8.5%
<b>Region</b>	6.20%	5.70%	4.95%	4.00%	3.58%	4.63%	7.71%	12.06%	12.97%	11.97%
<b>Florida</b>	5.69%	5.27%	4.66%	3.82%	3.34%	3.98%	6.26%	10.36%	11.28%	10.49%

Source: Florida Department of Economic Opportunity, Local Area Unemployment Statistics 2002-2011.

Frequently, unemployment rates reached double-digit levels, when the counties of the Region were accounted for individually. The Region's unemployment situation reversed between 2002 and 2007. During that period, unemployment rates in the Region steadily decreased. Unfortunately, by 2008, unemployment rates were on the rise. This was mostly due to the 2007 economic downturn and mortgage crisis. In part, the Region's high rate of population growth has contributed to higher than average levels of unemployment as in-migrants arrive at a rate that exceeds job creation.

Between 2009 and 2010, unemployment rates for the Region were at their highest in 10 years, compared to state unemployment. Table 12 summarizes annual average unemployment rates in the Region, its member counties, and the state from 2002 to 2007 (Note: unemployment rates issued in 1996 and after are not comparable with previous years).

Hernando County had the unfortunate distinction of leading the Region with the highest annual average unemployment for most of the period between 2002 and 2007. Most recently, Sumter County has achieved the lowest unemployment in the Region.

**STRATEGIC FINDING: On the whole, the Region suffers persistent, higher levels of unemployment than the state. Pockets of localized higher unemployment within certain localities are of concern. Remediation of the unemployment through diversification of**



the economic base and job creation should remain priorities of Regional economic development. In particular, economic development efforts should focus on creating industry clusters not dependent on Regional population increase to sustain growth.

POVERTY

TABLE 13.  
LEVELS OF POVERTY (1989-2010) BY NUMBER AND PERCENT

	1989	(%)	1999	(%)	2003	(%)	2010	(%)
Citrus	11,550	12.6%	13,541	11.7%	15,944	12.4%	12,543	10.3%
Hernando	10,970	11.0%	13,307	10.3%	17,928	12.1%	12,292	8.6%
Levy	5,247	20.7%	6,263	18.6%	5,971	16.3%	4,964	15.1%
Marion	27,794	14.6%	32,918	13.1%	39,769	14.0%	28,536	10.4%
Sumter	5,919	19.8%	6,448	13.7%	6,800	13.1%	4,657	5.6%
Region	61,480	13.8%	72,477	12.2%	86,412	13.6%	62,992	9.6%
Florida	1,604,186	12.7%	1,952,629	12.5%	2,215,209	13.0%	1,478,045	9.8%

Source: U.S. Census, 2010, 2000, 1990.  
*Florida Statistical Abstract 2006*. Table 5.48, p. 239-241.

Table 13 summarizes the numbers of persons living in poverty in the Withlacoochee Region, and it also presents a historical tracking of poverty levels. From 1999 to 2010, the percentage and total numbers of persons living in poverty has gone down. In fact, the numbers of persons living in poverty in 2010 closely resemble those of 1989, although the percentages are lower in 2010, as population has increased. Presumably, in-migration of more affluent persons has had the statistical effect of diluting the impoverished population as a percentage of total population.

From 1979 to 1999, the percent of poverty in the Region had decreased to 12.2%, but the real number of persons in poverty increased by 39.8% to 72,477. By comparison, the percent of persons in poverty for the state of Florida decreased from 13.5% in 1979 to 12.5% in 1999. Although the Region's increase in poverty was similar to the state as a whole, more than half of the Region maintains poverty levels greater than the state average.

As shown in the table above, the Regional poverty rate has decreased since 1999. This trend can also be seen in individual counties. All counties in the Region saw decreases of their poverty rates during this period. Levy County's high poverty level decreased by approximately a percentage point and still remains highest. Most counties in the Region have poverty rates around or in excess of the state rate. Sumter and Hernando Counties are the exceptions. Both showed a decrease in poverty from 1999 to 2010 and now have a rate below the state average.

**STRATEGIC FINDING:** Over half the counties in the Region have high numbers of individuals in poverty. The numerical increase of persons in poverty highlights how existing economic opportunities may not be providing prosperity evenly throughout the Region's population. Elevated levels of poverty within the Region and a faster rate of poverty growth versus other parts of the state may predict future income inequality between the Region and the outside economy. This interpretation is reinforced by the



fact that existing regional median and per capita incomes remain lower than the state level.

CIVIC PARTICIPATION

The Florida Department of State, Division of Elections maintains election results for each county in Florida. Table 14 compares voter participation rates among the Region, its member counties, and the state from 2000 to 2010. Trends in county voter participation are parallel to those of the state, with participation increasing in presidential election years. Overall, every county in the Region has higher voter participation rates than the state. Hernando County is the exception, where rates voter participation rates were slightly lower than the state in four of the six years cited in Table 14.

TABLE 14  
VOTER PARTICIPATION IN THE WITHLACOOCHEE REGION AND STATE,  
BIENNIAL GENERAL ELECTIONS, 2000 TO 2010

Area	General Election Year					
	2000	2002	2004	2006	2008	2010
<b>Citrus</b>	70.6%	62.4%	76.8%	52.9%	74.8%	57.1%
<b>Hernando</b>	68.6%	57.5%	73.7%	47.9%	72.0%	48.4%
<b>Levy</b>	72.3%	56.6%	74.0%	47.4%	72.8%	51.9%
<b>Marion</b>	71.8%	59.1%	76.2%	50.8%	76.1%	54.4%
<b>Sumter</b>	73.0%	63.2%	79.0%	61.8%	82.2%	65.2%
<b>Region</b>	70.8%	59.6%	75.8%	51.5%	75.4%	54.7%
<b>Florida</b>	70.1%	55.3%	74.2%	46.8%	75.2%	48.7%

Source: Florida Department of State, Division of Elections.  
<<https://doe.dos.state.fl.us/elections/resultsarchive/Index.asp?ElectionDate=11/2/2004&DATAMODE=>>

REGIONAL FACTORS

TRANSPORTATION

The Census provides information on place of work and residence, and it also provides information on commuter travel time. Approximately one in four workers within the Region was employed outside their county of residence in 2000 and 2010 (Table 15A). From 2000 to 2010, the number of workers commuting outside of their county of residence increased in the member counties of the Region and also in the state. However, the Region and the state remained above the nation (72.6%) in retaining employees in their county of residence for 2010. Out of the counties in the Region, Levy County continued to lead with 51.4% of its residents



commuting outside of the county for employment. Sumter County experienced the only decrease from 45.8% in 2000 to 38.1% in 2010.

TABLE 15A.  
PLACE OF WORK WITHIN REGION (2000-2010)

	2000		2010	
	In county of residence	Worked outside county of residence	In county of residence	Outside county of residence
<b>Citrus</b>	77.7%	22.3%	77.5%	22.5%
<b>Hernando</b>	66.7%	33.3%	61.7%	38.3%
<b>Levy</b>	53.6%	46.4%	48.6%	51.4%
<b>Marion</b>	86.2%	13.8%	83.4%	16.6%
<b>Sumter</b>	54.2%	45.8%	61.9%	38.1%
<b>Region</b>	76.2%	23.8%	73.8%	26.2%
<b>Florida</b>	81.9%	18.1%	81.3%	18.7%

Source: US Census, 2000 and 2010.

Additionally, commuting times in the Region are on the rise. (See Table 15bB). However, the percentage of residents commuting 60 minutes or more to work has decreased, while the percentage of residents working from home has increased from 2000 to 2010. The mean travel time for the Region was at 26.5 minutes. Hernando and Levy were the only counties in the Region that surpassed the state's median travel time for 2010. Marion and Sumter Counties' mean travel times were lower than the State, which is at 25.6 minutes, and the national average, 25.3 minutes. Table 15C shows the daily vehicle miles traveled from 2001 to 2010 in the Region.

TABLE 15B.  
TRAVEL TIME TO WORK WITHIN REGION, 2010

	Worked at home	less than 20 minutes	20 to 39 minutes	40 to 59 minutes	60 or more	Mean Travel Time (min)
<b>Citrus</b>	5.9%	44.0%	34.6%	6.9%	8.6%	26.4
<b>Hernando</b>	4.6%	39.8%	26.7%	11.8%	17.0%	30.8
<b>Levy</b>	5.3%	36.0%	30.0%	22.0%	6.7%	27.9
<b>Marion</b>	4.6%	41.5%	39.5%	8.9%	5.6%	24.8
<b>Sumter</b>	7.3%	52.2%	23.4%	10.8%	6.2%	22.6
<b>Region</b>	5.1%	42.1%	33.9%	10.1%	8.8%	26.5
<b>Florida</b>	4.6%	37.8%	40.0%	11.2%	6.4%	25.6

Source: US Census 2010.



TABLE 15C  
DAILY VEHICLE MILES TRAVELED IN THE WITHLACOOCHEE REGION AND STATE,  
2001 TO 2010 (MILLIONS OF MILES)

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Citrus</b>	3.35	3.76	4.12	4.19	4.39	4.31	4.33	4.12	4.29	4.41
<b>Hernando</b>	3.99	4.37	4.55	5.01	5.03	5.04	5.19	4.99	4.91	4.90
<b>Levy</b>	1.58	1.64	1.60	1.67	1.71	1.66	1.65	1.64	1.60	1.62
<b>Marion</b>	9.57	9.71	10.35	11.70	11.85	11.81	11.91	11.40	11.28	11.07
<b>Sumter</b>	2.86	2.88	3.13	3.36	3.40	3.45	3.51	3.43	3.37	3.63
<b>Region</b>	21.35	22.35	23.75	25.93	26.38	26.28	26.59	25.57	25.44	25.63
<b>Florida</b>	468.57	489.54	508.61	537.49	550.61	558.31	562.80	542.33	538.09	536.32

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

<<http://www.dot.state.fl.us/planning/statistics/mileage-rpts/public.shtm>>

**STRATEGIC FINDING: Existing land use patterns and proximity to infrastructure will guide growth. To the extent possible, economic development within the Region should proceed in a manner that takes the land use and transportation relationship into consideration. Regional economic development planning should seek ways to integrate economic development activity with existing or proposed transportation system management and applicable state and local policies. Whenever possible, economic development projects should make a positive contribution to the multimodal transportation options.**

#### LAND USE

Table 16 lists proportional land use by category and percentage for each county in the Region. Land use in the Region is predominantly agriculture/rural residential and residential. In 2000, 40.0% of the Region's population lived in areas designated as rural: either incorporated municipalities with a population of less than 2,500, or other places not in a designated urban area. As many unincorporated communities exist within the Region, a rural designation does not necessarily imply a farm or agricultural setting. The Region has stayed far more rural than Florida, where 89.3% of the state's population resided in urbanized areas in 2000.

Regional land use remained generally consistent with the land use patterns of the state. Residential was by far the largest category. Government represented the second largest land use, no doubt because of the inclusive nature of the category. Commercial land use is also well represented. Agricultural land use was lower than what might have been expected, perhaps because of the tendency for agricultural land to be converted to residential use and also owing



to the Region’s landform.

For economic development purposes, the most interesting figures are those for industrial land use. As a Region, industrial land use represented about half of the typical state amount. One factor could be a shortage of suitably zoned industrial land. A comparative lack of industrially zoned land could have numerous causes ranging from local land use policies or market factors to a lack of appropriate infrastructure to allow for industrial development.

TABLE 16.  
PERCENTAGE LAND USE BY TYPE (2010)

	Residential (%)	Commercial (%)	Industrial (%)	Agricultural (%)	Institutional (%)	Government (%)
<b>Citrus</b>	71.0%	10.5%	1.0%	0.4%	2.9%	14.2%
<b>Hernando</b>	72.6%	11.6%	1.7%	1.6%	2.8%	9.7%
<b>Levy</b>	64.9%	8.2%	0.9%	12.6%	2.4%	11.0%
<b>Marion</b>	65.6%	10.8%	3.2%	5.0%	2.5%	12.9%
<b>Sumter</b>	80.5%	9.1%	1.3%	3.8%	1.4%	4.0%
<b>Region</b>	70.1%	10.5%	2.1%	3.6%	2.5%	11.2%
<b>Florida</b>	69.7%	14.1%	3.8%	1.0%	2.6%	8.9%

\*Figures may not add due to rounding.

Source: 2011 Florida Statistical Abstract, Table 23.97, Electronic Data Format.

**STRATEGIC FACTORS:** The Region continues to have a predominately rural character. Local land use patterns seem consistent with statewide patterns except in the area of industrial land use. Regional economic development should work to advance industrial use project proposals that reflect win/win arrangements—those arrangements that expand the scope of industrial land use, widely distribute economic benefits, and represent the best of what might be physically achieved in site design.

#### HOUSING

Table 17A and 17B present summary information cataloguing housing conditions in the Region. In terms of affordability, current housing conditions reflect more positive housing conditions than can generally be found elsewhere in the state. Although the regional percentage of rental cost burdened household approaches the state level, affordability generally stretches both the owner occupied and rental market segments.

The percent of owner occupied housing exceeds the state’s percent by a considerable degree, 84.9% versus 70.5%. Moreover, about half of the Region’s housing stock is located in counties that have even higher rates of owner occupied housing. Marion County has the lowest rate of owner occupied housing, yet its rate is almost 10% higher than the state average.

Median home prices, except recently in Sumter County, consistently range lower than the median home price for the state. Historically, the percentage of home owners paying more than 30% of their income for housing (the widely accepted standard for affordability in housing) had ranked far lower than the state’s average level. Home owners in the Region were far less likely to be cost burdened by housing expense than their counterparts outside of the area. However,



more recently, Hernando and Levy Counties' percent of owner cost burdened have surpassed the state, and all of the other counties in the Region have percentages just below the state's. Renters do not fare as well, and while percentages of rent cost burdened are much higher than percentages of owner cost burdened, the regional percentage (25.02%) is still lower than the state average (25.8%). Again, Hernando and Levy Counties lead the Region in highest percentages of rent cost burdened, at 26.1% and 26.8%, respectively.

TABLE 17A.  
2009 REGIONAL HOUSING INFORMATION

	Households	Housing Stock (%)	Percent Owner Occupied	Median Home Price	% Rent Cost Burdened	% Owner Cost Burdened
Citrus	64,653	15.7%	86.2%	\$ 120,000	25%	8.9%
Hernando	69,692	20.0%	86.2%	\$ 115,500	26.1%	10.9%
Levy	16,702	3.1%	83.7%	\$ 145,500	26.8%	14.3%
Marion	138,318	43.3%	80.3%	\$ 145,000	22.7%	9.2%
Sumter	38,218	17.9%	87.9%	\$ 202,400	24.5%	9.4%
Region	327,583	100.0%	84.9%	\$ 145,680	25.02%	10.54%
Florida	7,501,217	NA	70.5%	\$ 165,000	25.8%	9.8%

Source: Shimberg Center for Affordable Housing, FHDC, 2009; Website.

TABLE 17B  
RELATIVE HOUSING PRICE IN THE WITHLACOOCHEE REGION AND STATE,  
2001 TO 2010 (NATIONAL INDEX = 1.0)

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Citrus	0.51	0.51	0.52	0.55	0.61	0.63	0.58	0.53	0.50	0.50
Hernando	0.41	0.41	0.42	0.44	0.49	0.51	0.46	0.43	0.40	0.40
Levy	0.72	0.72	0.74	0.77	0.87	0.90	0.83	0.76	0.70	0.71
Marion	0.69	0.69	0.71	0.74	0.83	0.86	0.79	0.72	0.67	0.68
Sumter	0.53	0.54	0.55	0.57	0.64	0.67	0.61	0.56	0.52	0.54
Region	0.58	0.58	0.59	0.62	0.70	0.72	0.66	0.61	0.56	0.57
Florida	0.68	0.69	0.71	0.75	0.85	0.86	0.81	0.75	0.66	0.66

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

**STRATEGIC FINDING:** Currently and over the short-term, the relative affordability of local housing markets constitutes a strong regional competitive advantage. The Region's comparative affordability in housing may decrease over time in relation to immigration patterns. Where possible, regional economic development opportunities should be structured to promote a range of housing options for new arrivals.



## INFRASTRUCTURE

Owing to the Region's rural character, infrastructure distribution remains uneven. Lack of infrastructure is an important local factor limiting growth of the regional economy. While the urbanized areas of the Region generally benefit from the availability of infrastructure and public services, it is not always the case that adequate infrastructure exists to support those types of activities most needed in the regional economy. In rural areas, the simple availability of infrastructure or the economic feasibility of infrastructure provision often play a determining role in land development timelines. In all cases, development of necessary and adequate infrastructure constitutes a key prerequisite to regional economic development.

According to state law, local governments in Florida must provide consistent, acceptable, and minimum levels of several public services. Local governments have latitude to define level of service standards (LOS) in their jurisdiction. However, once established, level of service requirements strictly apply to new development and must be applied within the local government. New development may only proceed in pace with those actions necessary to ensure the public services and facilities hold to the level of service standards.

In the state of Florida, local government comprehensive plans must specify how infrastructure will be provided and funded. Local governments are required to demonstrate, in their comprehensive plans, the financial feasibility of capital improvements over at least a five year time frame.

**STRATEGIC FINDING: Provision of infrastructure necessary to enable desired economic growth within the Region is a key challenge and should constitute a major aim of economic development efforts. Because local governments are required to schedule infrastructure and other capital improvements, the business community can benefit from this aspect of Florida's growth management system. The location and timing of those public services, on which commerce depends, are well known in advance. This fact can function as a legislative risk minimizing tool for state and regional investment.**

## WATER RESOURCES

Potable water supply is provided within the Region by local governments, except where provided by the private sector or state. Potable water systems usually consist of a water source, treatment plant, distribution and storage network. Most frequently, ground water serves as the source of potable water within the Region. On balance, the Region has good groundwater quality, although development patterns have the ability to damage drinking water supply. Local governments have adopted level of service standards for potable water. Cities and counties must allocate fiscal resources to meet those standards. Typically, when water service functions as a limiting factor to land development, it is because water service is not available at the scale necessary to facilitate the land use. Over the long-term planning horizon, shortages of potable water could affect development patterns regionally.

While abundant ground and surface waters are among the Region's most valuable natural assets, they have been considered as a source of water supply for the Tampa Bay Region. Although the transfer of water from the Withlacoochee Region has thus far been prevented by



the Southwest Florida Water Management District's "local sources first" policies, this situation could change at any time, based on a prioritization of "available" potable water sources and perceived state needs. The withdrawal of water for local, regional or out-of-region use has the potential to alter the Region's hydrologic cycle, thereby causing permanent ecological damage and economic disruption in affected areas.

Such disruption would be of tremendous economic impact to the Region. A 2004 economic impact assessment, estimated the value of Silver Springs in Marion County to represent \$61,450,000 to the regional economy with \$12,610,000 paid in annual wages. Again, from Silver Springs alone, it was estimated that total employment owing to direct and indirect benefits from the springs produced 1,060 full or part-time jobs within the Region. Silver Springs attracted 760,000 visitors with a total average daily expenditure per party of \$248.00.

**STRATEGIC FINDING: At the scale of site development, inadequate water service hinders economic development efforts. The Region's water supply will be a positive locational aspect only as long as it is utilized within the Region. State comprehensive planning requirements may not always function to preference local water use. Surface water quality is also of vital importance to the Region's recreation and natural resources based tourism industries as well as overall economic well-being.**

#### SEWER

Sanitary sewer service is provided regionally by cities, counties, and private groups. In most cases, sanitary sewer provision follows the model of regional facilities servicing larger areas and package plants or septic systems serving localized areas. As with other types of infrastructure, local governments must adopt and follow level of service standards for sanitary sewer. Given the flat topography characteristic of the Region's landform, it is feasible to provide conventional, gravity sewers if requisite conditions are met for a particular site and system. This means that future economic development of the Region will not be dependent on utilization of advanced sewer systems technology such as vacuum sewers.

For the Region as a whole, the main challenge has been the uniform provision of sanitary sewer service. Given the Region's primarily rural character, it is no surprise that public sewer systems are concentrated in the most urbanized areas. Therefore, organized provision of sewer service outside of municipal systems is segmented and often acts to support existing growth rather than allow for future development. Lack of sanitary sewer service and the capacity deficits in existing systems to support intensity of use inhibit commercial and industrial growth potential.

**STRATEGIC FINDING: Because the Region remains rural in nature with urbanized pockets, type of sanitary sewer varies by location. Capacity of the sewer system similarly changes depending on how a particular location is serviced. Development of adequate sanitary sewer infrastructure ranks highly as a regional economic development priority. Again, because of the Region's rural character, development of adequate infrastructure is often a prerequisite to development of commercial and industrial uses of significance to regional economic development efforts.**



## ROADS

Interstate 75 transverses the Region and contains the northern terminus of Florida's Turnpike. Because several major federal and state highways pass through the Region (and the City of Ocala) the Region is an important transportation hub. The proposed Northern Extension of the Florida Turnpike (Sumter, Marion, Levy) and the Suncoast Parkway (Hernando and Citrus), if completed in the near future, will increase access to the Region and will potentially increase transportation-related activities including trucking, truck stops, and warehouse and distribution centers. A program of broad expansion of existing roadways or construction of new roads would inevitably be constrained by the Region's politics, landform or total cost as limiting factors.

The regional highway network is generally adequate. Major arterials such as U.S. 19, U.S. 41, U.S. 441, and U.S. 301 move high volumes of traffic through the Region. While most roads provide acceptable service, major exceptions include State Road 200 in southwest Marion County, State Road 50 in Hernando County, and US 41 in Citrus County which are congested due to rapid, sprawling development in previously rural areas. Access to points within the Region is relatively direct. This offers the possibility of stable intra-regional links that allow easy travel between central and outlying areas. A universal constraint to development along the regional highway system is that it encourages urban sprawl and traffic congestion.

**STRATEGIC FINDING: Existing roadways within the Region offer good prospects for economic development opportunities, especially in those areas with easy access to Interstate 75. The ground transportation system within the Region proves adequate. However, where needed, roadway improvements may play a positive role in expanding the regional economy.**

## RAILROADS

Rail is an often overlooked transportation resource that should be considered as a potential solution to freight and transportation issues of the future. The fluctuation of gasoline prices holds a direct bearing on the feasibility of rail being revived to former levels. The regional economy can realize a greater degree of economic resiliency by maintaining rail connectivity and infrastructure.

CSX and Pinsky Company railroads provide freight rail service to and from the Region. CSX operates a north/south line, running through Marion, Sumter and Hernando Counties. Recently, CSX has entered a line sharing deal with the state of Florida. The arrangement would start passenger service farther south in the state with the consequence of increasing freight service through the Withlacoochee Region. The CSX freight line services the cities of Ocala, Wildwood, Coleman and Bushnell, and it carries non-metallic minerals, chemicals, some hazardous waste, and allied products. The other CSX line runs through Levy, Marion, and Citrus Counties, and terminates at the Crystal River Power Plant. This line primarily carries coal for electrical power generation.

The Pinsky Company, as Florida Northern Railroad, operates several smaller lines in the



Region which link Crystal River (Citrus County) to High Springs further north outside the Region in Alachua County. Another Pinsky line connects Lowell and Candler, passing through Ocala. Although the service is localized, it is important to the industries and communities it serves.

**STRATEGIC FINDING: The area is well served by freight rail, and this figures as a boon to economic development potential generally. It remains to be seen how anticipated increases in freight rail activity might tangibly benefit the Region. CEDS project development should both consider the scope of rail transport options available locally as well as seek to expand industrial use within the Region.**

#### AIRPORTS AND SEAPORTS

The Region has no seaport listed on the Florida Port Council's *Florida Seaport Mission Plan*. Nevertheless, the Progress Energy Corporation's barge docking facilities in Citrus County are of regional significance. Generally, prospects for seaport development are limited within the Region due to the shallow depth of the Gulf of Mexico abutting the Region's coastline. One exception is the western extent of the decommissioned Cross Florida Barge Canal, whose 300 ft wide channel extends inland for 8 miles. It would be possible to site additional marina and light docking facilities in its vicinity.

Despite excellent candidate airports, the Region presently has no commercial air passenger service. Likewise, the Region's central location within the state makes it a logical place to site a reliever airport facility. However, regional airport planning results from cooperation among federal, state, local governments and existing airports, and to date this process has not yielded such results for the Region. Perhaps one barrier working against development of regional air facilities is that the airports of the Region find themselves in different airport planning zones. Without a passenger service, the Region's airports classify as general aviation facilities, specializing in air cargo and personal transportation services.

Airports similarly play vital roles as economic catalyst locations. For example, the City of Ocala hopes to see development on hundreds of acres abutting its airport, while established airport industrial parks in the Region--such as Hernando County's 155 acre Airport Industrial Park--have established track record of great success. In Levy County, the Williston Municipal Airport is strongly positioned for future growth. The airport, formerly a World War II Era airfield, has 7000' and 4330' runways as well as thousands of acres of adjoining industrially zoned land.

**STRATEGIC FINDING: Further development of airport and seaport facilities would serve a useful economic development purpose but have always faced a series of internal and external barriers. It is of vital importance that the Region's airports and coastal facilities have infrastructure capable of sustaining expansion of the Region's economy.**

#### INDUSTRIAL PARKS

Economic development in the Region has traditionally cited the limited number of industrial parks and suitable sites as a constraint to economic growth. To some extent, this is a local land



use issue to which the economic development community can respond but cannot control. Market factors generally do not substantially contribute to the shortage of industrial sites in the Region, but availability or assembly of suitably large tracts for greenfield industrial does present an obstacle.

Although the area hosts much industrial activity, the comparatively smaller number of firms adds to difficulties providing appropriate infrastructure to accommodate industrial use as economies of scope are difficult to arrange. It also explains why most existing sites are located in urbanized areas with access to municipal public services and high volume transportation corridors. Lack of industrial sites is a significant constraint to future land development and therefore regional economic diversification. However, location of the Region in the center of the state and an adequate ground transportation system means a greater development potential exists but is yet unrealized.

**STRATEGIC FINDING: Supply of industrial land remains one of the greater challenges to successful maximization of economic potential. Thus, industrial land development should be a focus of economic development efforts in the Region. Any solution to the shortage of industrial sites will require partnership and cooperation between users, local governments and the economic development community.**

#### ELECTRICITY

The presence of a major electric generating facility (Progress Energy's Crystal River Energy Complex) in the Region ensures ample electric power for economic development activities. According to the US Department of Energy, the Crystal River Energy Complex is the ninth largest power plant in the United States. Progress Energy has proposed an expansion of electrical power generation at the plant through re-tooling and uprate of the nuclear power unit. When completed, this project will yield an additional 180 MW of electrical power. Pending necessary approvals, this project was scheduled to begin in 2009 and be completed by 2011. Natural gas pipelines through the Region make natural gas available to outlying areas and enhance the potential for natural gas-dependent industries.

More recently, Progress Energy has proposed a nuclear power plant to be sited in Levy County. If constructed, within ten years, the new plant could provide an estimated 2200 to 3000 MW of electrical power. Addition of the new facility would vastly increase the amount of electrical power generated in the Region, making a substantial surplus available for new industry and for export to the power grid. Private utilities, local governments and member-owned cooperatives make electrical power available to residents of the Region currently.

**STRATEGIC FINDING: If existing power generation plants are coupled with proposed expansion in the utility sector generating capacity, then the Region will produce a huge surplus of electricity. Regional economic development should seek ways to use any regional energy surplus to encourage economic diversification. Provision of appropriate electrical power infrastructure is vital to economic development efforts in rural and developing areas of the Region.**



## BROADBAND

To date, few public initiatives providing comprehensive broadband communications service have been initiated in the Region. Currently, the recently established North Florida Broadband Authority is actively pursuing broadband improvement in Levy County. The Region faces the same challenges regarding broadband communications as do many other rural areas. Ability to access high speed internet evenly throughout the Region does constitute a concern, but the need to equip business is presently handled by the market on the basis of demand.

Section 288.95155 of the State of Florida Statutes does make provisions for assistance to technology firms of the type that would extensively use broadband resources. This legislation establishes a means to provide funding to aid new technology firms. Investment in broadband communications infrastructure may qualify under state law.

**STRATEGIC FINDING: While better access to broadband communications no doubt aids competitive advantage, the often discussed subject has not yet entered into widespread implementation, regionally. Given the rural character of the area, what may prove more promising is a focus on broadband access in redevelopment areas.**

## FINANCIAL RESOURCES

Tables 18A, 18B, and 18C compare gross domestic product, trade exports, and trade imports, respectively, among the Region, its member counties, and the state.

TABLE 18A  
GROSS DOMESTIC PRODUCT IN THE WITHLACOOCHEE REGION AND STATE,  
2001 TO 2010 (BILLIONS OF FIXED 2005 DOLLARS)



Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Citrus</b>	2.37	2.40	2.52	2.68	2.77	2.79	2.71	2.64	2.75	2.82
<b>Hernando</b>	2.03	2.14	2.34	2.53	2.77	2.85	2.78	2.63	2.57	2.66
<b>Levy</b>	0.51	0.51	0.55	0.59	0.63	0.61	0.61	0.58	0.56	0.58
<b>Marion</b>	5.75	6.01	6.45	6.89	7.44	8.22	8.14	7.83	7.24	7.54
<b>Sumter</b>	0.60	0.65	0.75	0.85	1.08	1.21	1.30	1.26	1.24	1.32
<b>Region</b>	11.25	11.71	12.61	13.54	14.69	15.68	15.55	14.93	14.36	14.91
<b>Florida</b>	596.72	579.57	596.72	616.75	644.25	680.00	717.59	742.52	737.83	716.05

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

TABLE 18B  
TRADE EXPORTS IN THE WITHLACOOCHEE REGION AND STATE,  
2001 TO 2010 (BILLIONS OF FIXED 2005 DOLLARS)

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Citrus</b>	\$2.15	\$2.13	\$2.21	\$2.26	\$2.19	\$2.18	\$2.13	\$2.10	\$2.31	\$2.39
<b>Hernando</b>	\$1.67	\$1.75	\$1.89	\$1.99	\$2.16	\$2.14	\$2.09	\$1.90	\$1.86	\$1.96
<b>Levy</b>	\$0.47	\$0.47	\$0.50	\$0.54	\$0.61	\$0.57	\$0.59	\$0.54	\$0.50	\$0.53
<b>Marion</b>	\$5.10	\$5.33	\$5.56	\$5.86	\$6.44	\$6.85	\$6.81	\$6.37	\$5.85	\$6.20
<b>Sumter</b>	\$0.52	\$0.56	\$0.63	\$0.74	\$0.97	\$1.08	\$1.18	\$1.07	\$1.05	\$1.11
<b>Region</b>	\$9.90	\$10.25	\$10.79	\$11.38	\$12.36	\$12.80	\$12.80	\$11.97	\$11.58	\$12.20
<b>Florida</b>	\$431.06	\$440.19	\$454.90	\$477.68	\$507.90	\$513.80	\$517.27	\$494.13	\$478.74	\$507.02

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

TABLE 18C  
TRADE IMPORTS IN THE WITHLACOOCHEE REGION AND STATE,  
2001 TO 2010 (BILLIONS OF FIXED 2005 DOLLARS)



	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Citrus</b>	\$3.09	\$3.10	\$3.18	\$3.33	\$3.51	\$3.65	\$3.67	\$3.49	\$3.40	\$3.55
<b>Hernando</b>	\$3.38	\$3.48	\$3.64	\$3.90	\$4.14	\$4.30	\$4.27	\$4.03	\$3.83	\$4.02
<b>Levy</b>	\$0.97	\$0.96	\$1.02	\$1.08	\$1.15	\$1.15	\$1.17	\$1.11	\$1.04	\$1.09
<b>Marion</b>	\$7.24	\$7.46	\$7.88	\$8.53	\$9.20	\$9.64	\$9.69	\$9.11	\$8.54	\$9.10
<b>Sumter</b>	\$1.28	\$1.36	\$1.52	\$1.70	\$2.00	\$2.23	\$2.27	\$2.25	\$2.21	\$2.45
<b>Region</b>	\$15.96	\$16.35	\$17.22	\$18.54	\$20.00	\$20.97	\$21.07	\$19.98	\$19.02	\$20.21
<b>Florida</b>	\$447.40	\$458.37	\$470.73	\$503.30	\$537.11	\$550.05	\$555.19	\$526.57	\$493.46	\$520.94

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

#### CITY/COUNTY GENERAL FUNDS

Cities and counties of the Region generate revenue from taxation (directly or indirectly) and through charging fees. Ad valorem property taxes are assessed at the local millage rate. Counties may charge local option taxes as well. Two common local option taxes include a tourist development tax and gasoline tax. If approved by referendum, then a tourist development tax may be placed against tourism-related facilities and projects. Counties are free to set an independent level of gasoline tax.

Local governments may charge user fees, administrative fees and similar fees to raise government revenue. Examples of fees include utility charges, fees for licenses and permits, and charges for the sale of public documents. Other types of fees charged by local government include impact fees charged to new development and special assessments to fund infrastructure. Local government activities that generate surplus revenue may be run on an enterprise model.

Some funding for local government comes through state appropriation. The State of Florida also engages in revenue sharing of sales, cigarette and motor fuel taxes. Counties must meet Florida Revenue Trust Fund Sharing requirements, and funding is provided by an allocation formula. Federal funding constitutes another revenue source of vital importance. Local governments may obtain federal funding directly. They may receive federal benefits through intermediaries like the state or a metropolitan planning organization (MPO).

Local government revenue collection has broad impact across many areas: the local Capital Improvements Program (CIP), the public budget, and even state planning mandates. Cities and counties must provide revenue projections covering the general fund at least over a five year planning time frame, and they must conduct an update of their state-approved Comprehensive Plan's Capital Improvements Element (CIE) annually.



Within the Region, revenues, expenditures and assessed values have historically shown a steady increase. Soon after the economic downturn of mid-2008, housing values in the Region declined rapidly as did ad valorem tax revenues. Taxes and impact fees account for the most important source of revenue for counties. Together these categories form the majority share of income for local governments in the Region. Oppositely, the largest categories of public sector expenditures include debt service and internal fund transfers. Other governments, effectively through shared public services or by intergovernmental agreement, will exchange funds for various purposes. State grants, fines and forfeitures provide extra sources of income. However, the loss of ad valorem value in the housing stock of the Region will have lasting effects on the ability of local governments to maintain planned capital improvements programs, thus, highlighting the current importance of public infrastructure funding for shovel ready projects to leverage needed jobs in the Region.

**STRATEGIC FINDING: The importance of taxes, impact fees and service charges complicate economic development activity at the local level. The cost of development in part reflects the need to provide public services. However, these public service costs could affect market decisions. Regional economic development activity should seek to support strategic goals that provide for win-win public/private partnerships.**

#### PUBLIC DEBT

Local governments may also borrow to raise revenue and frequently will do so to offset the high cost of capital improvements. Though governments may finance outlays using short-term debt, they more frequently authorize long-term bond issues. When issuing bonds, local governments have some choice how to proceed. Typically, general obligation bonds are issued. These bonds are backed by the full faith and credit of the local government. In Florida, general obligation bonds require approval of the electorate via a bond referendum. A primary financial advantage to using general obligation bonds is that they frequently represent the lowest cost of capital.

When a needed public improvement or development project could generate income, local governments have additional financing choices. Projects and capital improvements that generate revenue may be supported by revenue bonds. This type of bond uses the increase in public revenue to accomplish repayment of the bond issue. Because these bonds are secured by project revenue and lack the explicit guarantee of repayment carried by general obligation bonds, they carry a higher interest rates.

Local governments may also utilize tax increment finance (TIF) to produce a specialized type of revenue bond. Under state statute, tax increment financing frequently aids municipal redevelopment. TIF bonds divert public sector tax revenue increase to repay the amortized costs of project development. When a TIF District revenues are leveraged to pay debt service, the TIF arrangement acts to allow local governments to pursue projects they otherwise could not undertake in proportion to the scale of anticipated benefits. This type of bond arrangement may be approved without voter consent, as the project must be financially self-sustaining.



**STRATEGIC FINDING:** Analysis shows debt financing remains an important source of public sector revenue. Because local governments enter into debt obligations to finance improvements to infrastructure or public services, debt service remains of vital importance to economic development, especially when projects self-finance through Tax Increment Finance (TIF) or revenue bonds. Economic Development projects that benefit the Region are best advanced through multiple, complementary funding sources.

## CLUSTER ANALYSIS

### SUMMARY

This section contains a technical examination of the regional economy. Analysis has been conducted to better identify current trends, highlight areas of strength/weakness, and to forecast the likely course of economic growth in the Region. This section details how the regional economy should perform in the present, and how it will likely act in the future. Regional cluster analysis will yield a strategic assessment of CEDS plan content, and it will aid response to observed economic concerns.

Economic cluster analysis has been assembled in this section to provide insight into the regional economy's composition and movement. To begin, job creation and job loss are appraised in the context of the recent past. Next, the analysis moves to a discussion of regional economic growth as expressed through jobs in the shift share analysis and to isolate areas of regional competitive advantage. Finally, economic base analysis looks at the composition of the regional economy, identifying areas of comparative strength. It then identifies where improvement is most needed. Each analysis aims to identify the trends and causal relationships affecting present and future conditions. Building on the conclusions of the preceding Regional Analysis, the intent of the Cluster Analysis is to evaluate the structure of the regional economy to inform the goals of the Comprehensive Economic Development Strategy (CEDS).

### EMPLOYMENT BY SECTOR

Analysis has already established, that despite constant population growth, the Region has a below average labor force participation rate, indicating that new jobs are not the strongest factor attracting in-migrants. In-migration of population forms the basis for traditional growth in the regional economy. Some of the Region's industries directly provide goods and services to new arrivals, while the remainder must rely on the indirect benefits of this activity. The result is that the Region's economy remains undiversified. Consequently, any change in population growth patterns leaves the Region's economy vulnerable. The historical pattern of frequent spikes in unemployment supports this observation. Further evidence of this fact comes from per capita incomes and average wage levels well below levels found in the state and national economies. So, with the problems of the regional economy understood, focus can shift to a discussion of existing and future conditions.

An examination of activity within the regional economy should begin with a study of the recent past. Surveying existing conditions within the local economy should help establish a base



reference point for trends and economic behavior already happening or set to occur. Because subsequent analysis quantifies economic performance through employment, current patterns of employment within the Region's economy should be surveyed to start. As such, two main areas are of interest: 1) total employment by industry, and 2) changes in employment by industry.

The discussion that follows refers heavily to the tables presented on the next two pages. The reader should reference Tables 19A and 19B as necessary.



TABLE 19A.  
TOTAL EMPLOYMENT BY SECTOR AND PERCENTAGE (2010)

	Total Employment						Sector Size	
	Citrus	Hernando	Levy	Marion	Sumter	Region	(%) Region	(%) State
<b>Agriculture, Forestry, Fishing And Hunting</b>	119	156	678	1,808	304	3,065	2.04%	1.36%
<b>Mining</b>	80	49	(NA)	104	42	275	0.18%	0.06%
<b>Utilities</b>	(NA)	130	(NA)	271	411	812	0.54%	0.37%
<b>Construction</b>	2,308	1,771	753	5,972	1,502	12,306	8.19%	5.74%
<b>Manufacturing</b>	464	1,236	409	6,354	927	9,390	6.25%	5.09%
<b>Wholesale Trade</b>	667	618	188	3,095	277	4,845	3.22%	5.10%
<b>Retail Trade</b>	5,103	6,615	1,394	14,202	3,077	30,391	20.21%	15.35%
<b>Transportation And Warehousing</b>	236	1,242	102	1,955	350	3,885	2.58%	3.26%
<b>Information</b>	445	161	63	1,472	49	2,190	1.46%	2.24%
<b>Finance And Insurance</b>	688	731	261	2,712	452	4,844	3.22%	5.25%
<b>Real Estate And Rental And Leasing</b>	366	382	88	1,296	254	2,386	1.59%	2.49%
<b>Professional, Scientific, And Technical Services</b>	946	1,115	171	2,852	402	5,486	3.65%	7.17%
<b>Management Of Companies And Enterprises</b>	40	232	(NA)	327	(NA)	599	0.40%	1.29%
<b>Administrative &amp; Support &amp; Waste Management Service</b>	2,377	1,451	120	3,806	356	8,110	5.39%	8.82%
<b>Educational Services</b>	86	175	51	888	(NA)	1,200	0.80%	2.05%
<b>Health Care And Social Assistance</b>	7,616	7,225	856	12,169	2,303	30,169	20.07%	15.31%
<b>Arts, Entertainment, And Recreation</b>	642	790	122	1,866	1,062	4,482	2.98%	3.03%
<b>Accommodation And Food Services</b>	2,787	4,386	717	8,001	3,059	18,950	12.60%	12.19%
<b>Other Services</b>	929	1,249	138	2,546	385	5,247	3.49%	3.82%

Source: Florida Statistical Abstract 2011, Table 6.06, Electronic Data Format.



TABLE 19B.  
REGIONAL JOB GROWTH BY NUMBER AND PERCENTAGE CHANGE, 2009 TO 2010

	Job Growth						Sector Change	
	Citrus	Hernando	Levy	Marion	Sumter	Region	(%) Region	(%) State
<b>Agriculture, Forestry, Fishing And Hunting</b>	-9	-19	179	-383	-19	-251	-0.15%	-0.09%
<b>Mining</b>	22	(NA)	(NA)	-6	-3	62	0.04%	0.00%
<b>Utilities</b>	(NA)	-1	(NA)	-15	-8	-24	-0.01%	-0.01%
<b>Construction</b>	1	-334	67	-1,009	-115	-1,390	-0.85%	-0.70%
<b>Manufacturing</b>	-94	120	58	-224	-138	-278	-0.13%	-0.21%
<b>Wholesale Trade</b>	-27	-76	-28	-169	-22	-322	-0.19%	-0.10%
<b>Retail Trade</b>	-19	31	8	-230	120	-90	0.10%	0.23%
<b>Transportation And Warehousing</b>	-4	-89	-1	-81	38	-137	-0.07%	-0.02%
<b>Information</b>	-6	-14	-6	-189	19	-196	-0.12%	-0.09%
<b>Finance And Insurance</b>	-10	-34	-11	-904	48	-911	-0.58%	-0.06%
<b>Real Estate And Rental And Leasing</b>	-42	-10	-11	-105	90	-78	-0.04%	-0.05%
<b>Professional, Scientific, And Technical Services</b>	-51	11	-51	-167	5	-253	-0.14%	0.09%
<b>Management Of Companies And Enterprises</b>	9	24	(NA)	-98	(NA)	-65	-0.04%	-0.02%
<b>Administrative, Support, Waste Management Service</b>	305	-127	-31	-29	58	176	0.16%	0.16%
<b>Educational Services</b>	-26	-13	-2	102	(NA)	61	0.05%	0.14%
<b>Health Care And Social Assistance</b>	224	249	70	524	181	1,248	0.98%	0.39%
<b>Arts, Entertainment, And Recreation</b>	-67	93	-22	70	47	121	0.10%	0.03%
<b>Accommodation And Food Services</b>	12	67	-2	-16	1,024	1,085	0.81%	0.29%
<b>Other Services</b>	-74	32	4	62	119	143	0.12%	0.02%

Source: Florida Statistical Abstract 2011, Table 6.06, Electronic Data Format.



According to Florida's Bureau of Economic and Business Research (BEBR), the regional workforce numbered around 150,340 individuals in 2010. Table 19A lists total regional employment as segmented by industry type. In 2010, approximately half of the Region's workforce was employed in the service sector. A broad definition of the service sector—including the health care, financial, and real estate sectors, places about 51.0% of the Region's employment in this area. More specialized definitions of service sector employment would still provide a total employment figure of between 40.0% to 50.0%. Thereby, in keeping with the general pattern, retail trade is the Region's largest industry, accounting for about 20.0% of employment. Health care, construction and accommodation/food service follow as the next largest industries in total employment.

Table 19B documents changes in employment by industry type between 2009 and 2010, the last years for which data was available. Changes are given both in numbers of jobs and as a percent change in the labor force. Generally, from 2009 to 2010, the Region lost jobs in most industries, and changes were typically in tandem with patterns observed in the state economy. There were a few exceptions. The Region saw faster percentage decrease in the amount of employment owing to finance and insurance activity than was experienced within Florida, generally. Similarly, the Region also gained employment in the Mining and Arts, Entertainment, & Recreation sectors, while the state showed decline in these industries. Retail trade and Professional, Scientific, & Technical services were the only sectors where the state experienced slight gains in employment, while the Region decreased. Also, within services, the Region experienced faster growth in Health Care & Social Assistance, Accommodation & Food Services, and Administration & Support. These differences support the observation that the economic growth within the Region remains characteristically tied to in-migration of population.

By contrast, a number of industries reduced their share of total regional employment: agriculture, utilities, construction, information, real estate, management, professional services, transportation and warehousing, manufacturing, finance and insurance, wholesale trade, and retail trade. Once again, these changes tracked patterns in the state's economy more broadly.

So, the main point of analysis is a simple one: regional differences do exist. Therefore, regional economic development is an appropriate response to such conditions. Yet this observation also underscores the importance of questions related to the future of the Region's economy: Which sectors will produce future jobs? What factors will drive future job growth? What sectors are set to grow versus those that appear likely to decline? How does the Region compare to the state and national economies in specific sectors and industries? These and other questions will be addressed next in the shift share and economic base analysis sections.

### SHIFT SHARE ANALYSIS

A *Shift Share Analysis* dissects employment growth/decline for a specific industry over multiple years. The technique measures economic growth in terms of jobs, and it aims to isolate the strengths and weaknesses of a region's economy. This type of analysis produces three outputs: *Share Change*, *Mix Change*, and *Shift Change*.



- *Share change* represents the influence of an outside, reference economy. It can be thought of as change resulting from national growth.
- *Mix change* represents industry specific growth or declines. More exactly, it is the industry growth pattern adjusted to reflect trends in the national economy
- *Shift change* functions to measure the competitiveness of the Region. It reflects the difference between growth of regional industries versus changes that would otherwise occur in the absence of a Region's particular competitive advantages.

The general relationship between all three may be expressed as:

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

The Equation is:

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

A shift share analysis was conducted for the years 2010 through 2030 to assess growth and decline in the regional economy as measured in jobs. This forecasting approach separates the industries prepared to drive growth from those that will under-perform. Results are organized into Table 20 and sorted alphabetically. A few charts further summarize the results. Discussion of analysis and the strategic implications of growing versus declining industries accompany the charts. Industry definitions are taken from the North American Industrial Classification System (NAICS) 2002 Code Classification System.



TABLE 20.  
SUMMARY RESULTS FOR SHIFT SHARE ANALYSIS (2010-2030)

Industry	Share Change	Mix Change	Shift Change	Total Change
Accom, Food Services	6,113	471	2,648	9,232
Admin, Waste Services	5,003	1,321	-537	5,787
Arts, Enter, Rec	2,158	243	24	2,425
Construction	6,089	11,916	3,442	21,447
Educational Services	893	531	150	1,573
Federal Civilian	907	-1,214	0	-307
Federal Military	483	-616	0	-133
Finance, Insurance	3,877	-1,339	582	3,120
Forestry, Fishing, Other	1,107	-832	120	395
Health Care, Social Asst	10,306	13,593	2,781	26,681
Information	956	-874	-244	-162
Manufacturing	3,214	-6,122	831	-2,077
Mining	242	-166	486	562
Mngmt Of Co, Enter	265	-215	10	60
Other Services (Excl Gov)	6,172	2,216	1,440	9,829
Profess, Tech Services	3,840	3,482	1,358	8,681
Real Estate, Rental, Leasing	4,108	130	972	5,210
Retail Trade	11,532	-8,421	2,596	5,707
State & Local Gov	9,940	-1,404	4,417	12,954
Transp, Warehousing	2,616	-299	103	2,420
Utilities	546	-943	2	-395
Wholesale Trade	2,216	-2,032	440	624

Source: WRPC, REMI, 2012.

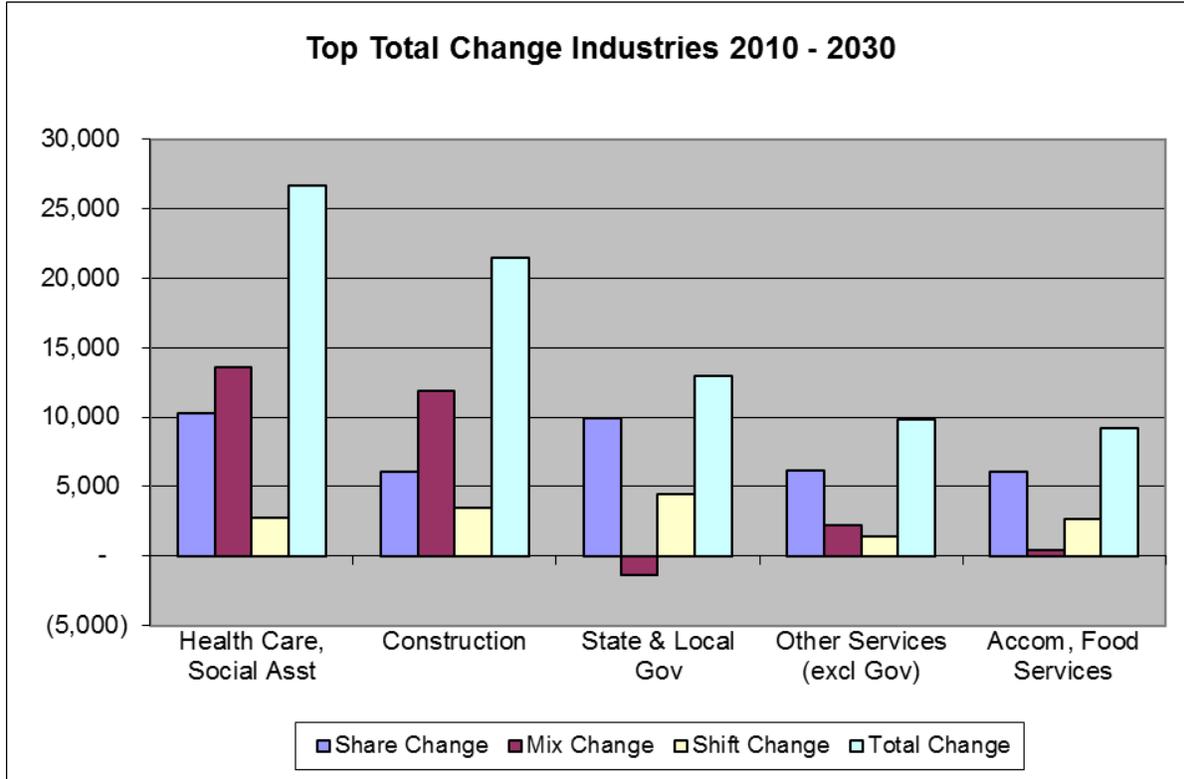
In sum, the shift share analysis, outlined in Table 20, forecasts about 113,000 new jobs for the Region by 2030. Currently, the Region has an approximately 41.03% labor force participation rate. Regional 2030 Population estimates suggest that anticipated population increase could bring the population of the Region to approximately of 1.1 million persons. Even with the Region's low labor force participation rate considered, predicted population increase still exceeds job creation. Clearly, this means job creation is not keeping pace with population growth. It also implies a further decline in the labor force participation rate and growth in transfer payments as a percentage of regional income. That is if population increase continues as a characteristic trend. Alternately, if total population does not exceed job growth, then population increase will have slowed with serious implications for the traditional patterns of growth within a Region that relies heavily on population influx to sustain regional prosperity. Neither situation represents a desirable scenario for the Region's economy.

Chart 1 depicts the Region's leading industries as measured by *total change*—or growth in net, new jobs. The results of this section of analysis are fairly straightforward, predicting total employment based on 2010 base year data. According to the model, the most growth should occur in the following industries: health care/social assistance, construction, accommodations/food services, and other services. What is evidenced corresponds to trends



already noted in the analysis—strong service sector growth and expansion those sectors tied to population increase.

CHART 1.

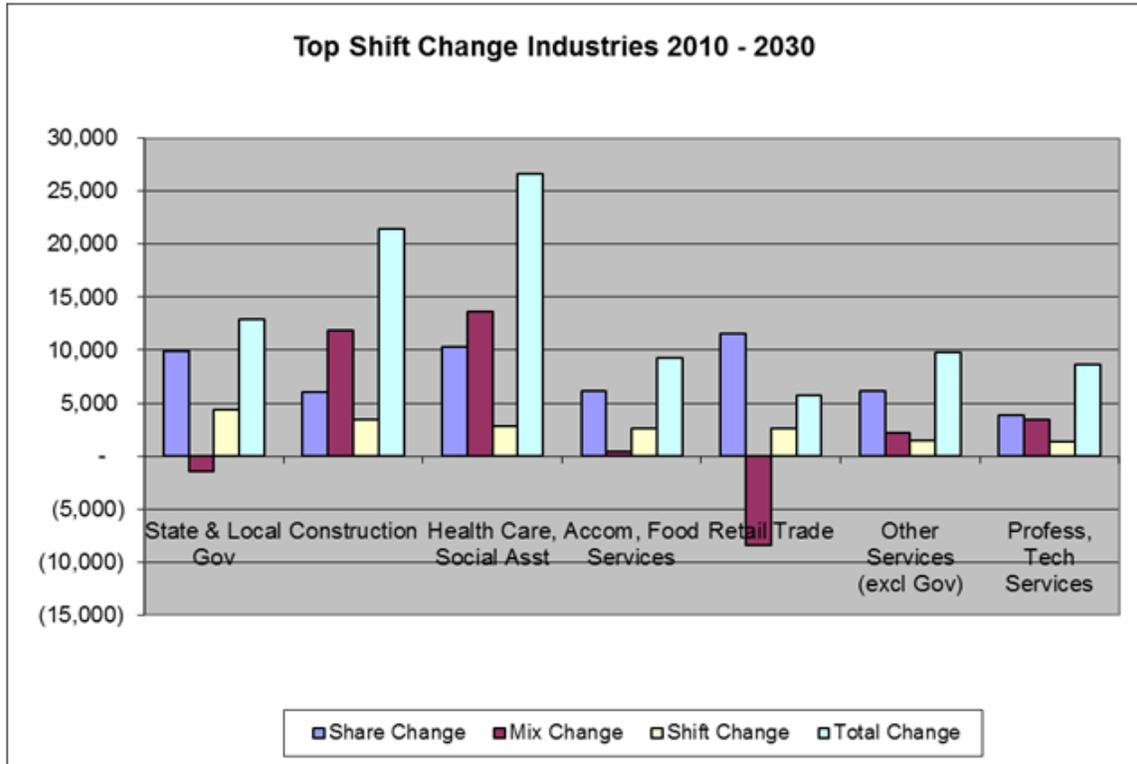


Source: WRPC, REMI, 2012.

Chart 2 lists the sectors that will lead job creation based on regional competitive advantage. The *shift change* represents analysis detailing the effect regional of characteristics on job creation. Thus, a high shift change value indicates the positive effect of a place upon an industry as seen accompanying the chart.



CHART 2.



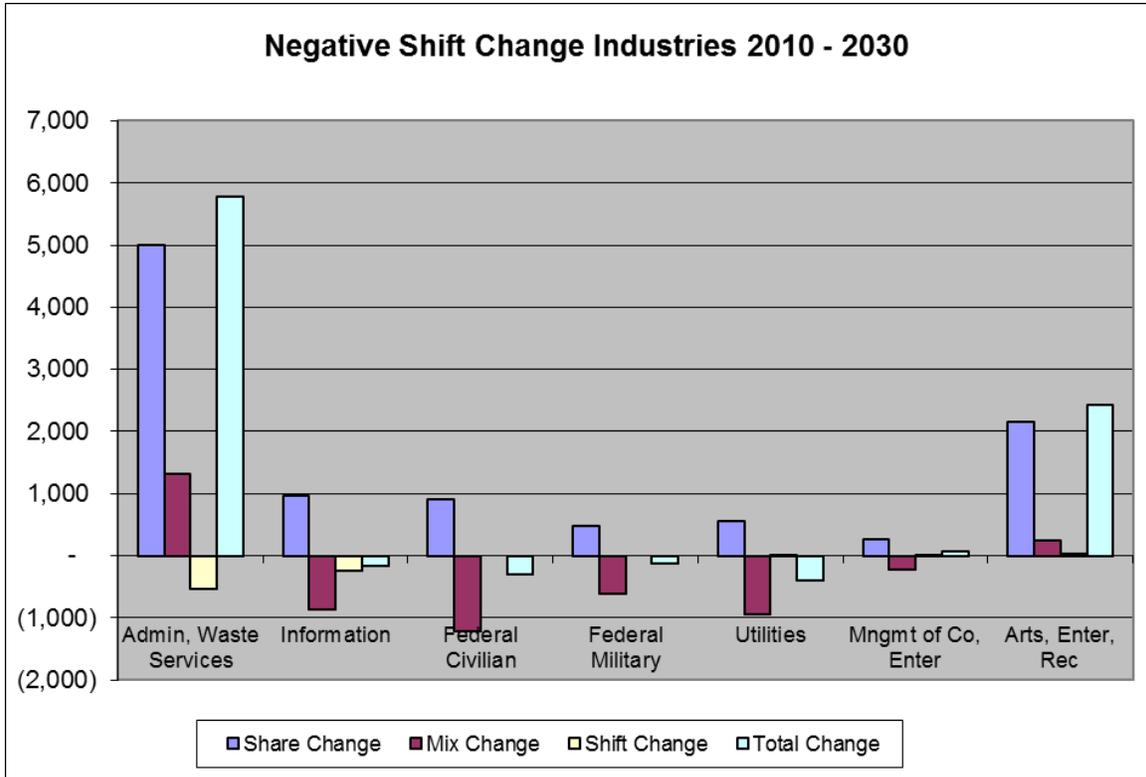
Source: WRPC, REMI, 2012.

Examination of shift change shows how the Region’s positive economic trends will affect local growth. Consistent with other analysis, the single largest factor affecting the Region’s economic future is continued population growth. Therefore, if current trends continue, the sectors linked to population growth (in-migration) will prosper most and will continue as the Region’s principal wealth center. Population growth will necessarily expand state and local government employment as need for public services increases. Construction, health care services, accommodation and food services, have the highest shift changes. Retail trade will consolidate but stay positive, owing to overall population increase. Other services and professional/tech services finish the list of those industries drawing strength from in-migration effects.

Chart 3 examines what industries are doing poorly in the Region relative to the external economy. These industries lack the ability to compete. The worst performing industries were administrative services and information, followed by federal civilian and military, utilities, management, and arts/recreational services. For all cases, it is industry trends—as represented by the *mix change*—that depress future job creation in these industries.



CHART 3.



Source: WRPC, REMI, 2012.

In an opposite fashion, characteristics of the Region do appear to be negatively influencing the wholesale, information, transportation, and waste services industries. This is puzzling, because regional factors—like proximity to natural resources and a central location in the state—should have a positive effect on these sectors. Although it is outside the scope of the current analysis to quantify the extent to which features of the Region are producing adverse impact, the simplest answer may stem from the Region’s well documented shortage of available industrial development sites.

### LOCATION QUOTIENT ANALYSIS

A location quotient analysis looks at the concentration of a specific industry in the Region compared to the concentration of that same industry in a larger reference economy—typically the national economy. If the concentration of workers in the specified industry is identical to the nation, then the location quotient would be 1. If the Region was more concentrated than the national economy in an industry, then the location quotient would be greater than 1. Conversely, if the Region was less concentrated in a given industry, then the location quotient would be less than 1. As was the case for shift share analysis, location quotient analysis was performed using definitions from 2002 (NAICS) Code Classification System.



The location quotient formula is:

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

Where:

$e_i$  = Local employment in industry  $i$

$e$  = Total local employment

$E_i$  = Reference area employment in industry  $i$

$E$  = Total reference area employment

Location quotient analysis was performed to determine the concentration and specialization of industries in the Region. Analysis covered an identical 2010 to 2030 time frame but is broken into five year increments. This presentation should better enable trend identification, which in turn assists assessment of the data.

Table 21 contains the complete results of location quotient analysis. To present the highest concentrations of industries first, results are sorted in descending strength of industry concentration. For ease of reference, an industry with a very strong regional presence would have a location quotient greater than 1.50 on the scale. An above average industry presence would score 1.00 to 1.50. A below average score would rank at 0.99 to 0.70, and a weak location quotient would be below 0.70 on the scale.

Results in Table 21 are presented by sector over a twenty year planning horizon. Each location quotient amount gives information as an average over a five-year increment. The strength of individual industries over the whole period of analysis can be assessed using this schedule. On the following pages, charts are provided to complement table information and further organize discussion of the economic base analysis.



TABLE 21.  
LOCATION QUOTIENT ANALYSIS FOR WITHLACOOCHEE REGION (2010-2030)

Industry	2010	2015	2020	2025	2030
Forestry, Fishing, Other	2.62	2.55	2.5	2.5	2.49
Utilities	1.93	1.86	1.84	1.81	1.77
Construction	1.42	1.51	1.5	1.45	1.42
Retail Trade	1.35	1.33	1.31	1.31	1.32
Other Services (Excl Gov)	1.29	1.28	1.26	1.25	1.25
Real Estate, Rental, Leasing	1.14	1.12	1.11	1.11	1.11
Health Care, Social Asst	1.16	1.13	1.11	1.11	1.11
Arts, Enter, Rec	1.17	1.1	1.08	1.08	1.08
State & Local Gov	1.05	1.05	1.06	1.07	1.07
Accom, Food Services	1.05	1.05	1.04	1.05	1.06
Admin, Waste Services	1.03	0.98	0.95	0.94	0.92
Transp, Warehousing	0.96	0.92	0.9	0.9	0.89
Finance, Insurance	0.87	0.87	0.86	0.85	0.83
Wholesale Trade	0.72	0.71	0.7	0.7	0.7
Mining	0.46	0.5	0.57	0.67	0.66
Profess, Tech Services	0.65	0.63	0.63	0.63	0.64
Federal Civilian	0.62	0.59	0.57	0.57	0.57
Manufacturing	0.53	0.54	0.54	0.54	0.54
Information	0.61	0.56	0.54	0.53	0.52
Educational Services	0.45	0.44	0.43	0.43	0.43
Federal Military	0.46	0.44	0.42	0.42	0.42
Mngmt Of Co, Enter	0.27	0.26	0.25	0.25	0.25

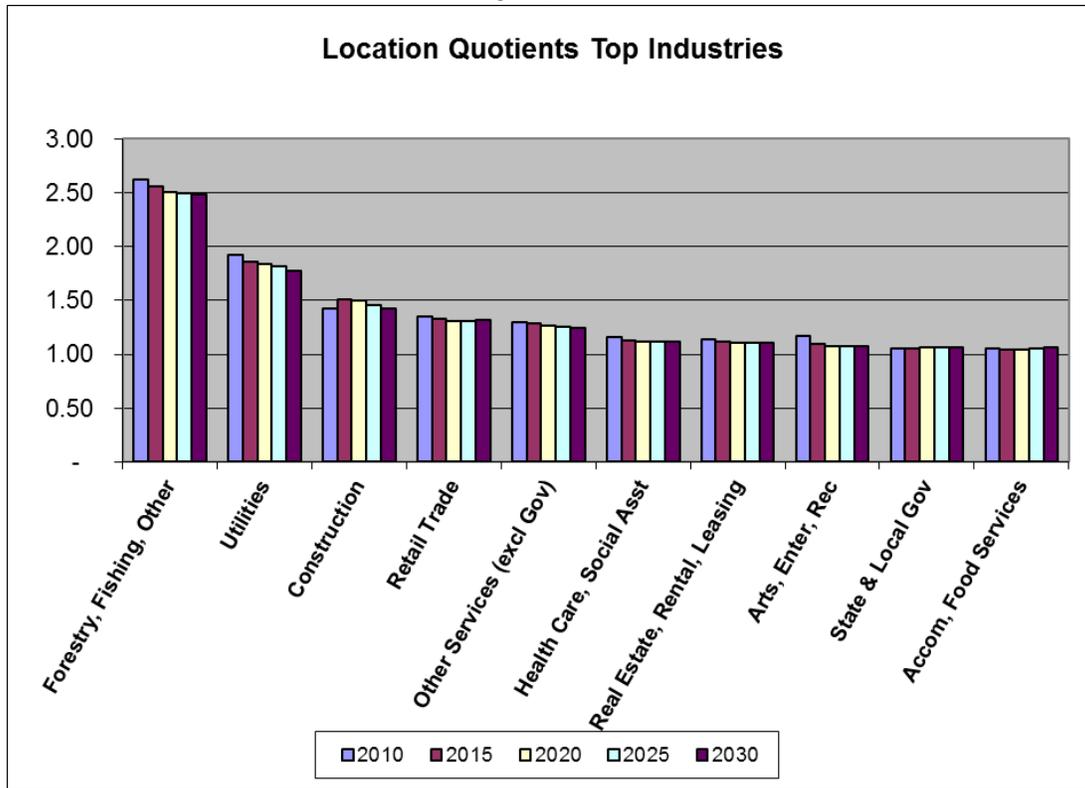
Source: WRPC, REMI, 2012.

Chart 4 lists the Region's most prevalent industries as compared to the Nation. With approximately 2.5 times as many individuals employed as the national average, the fishing and forestry, or primary sector category, had the highest value. Utilities and construction scored well above average. The location quotient analysis also identifies the comparative strength of the Region's retail trade. Other services also appeared well represented within the Region.

The data presented in Chart 4 may be interpreted to show trends for the future. Construction is expected to plateau to near 2010 levels by 2030. The analysis projects decline for many of the Region's top performing industries. The trend of decline appears most clearly as the frame of analysis moves toward 2030. For example, the model shows declines to forestry, utilities, retail, real estate, health care, and art/entertainment.



CHART 4.



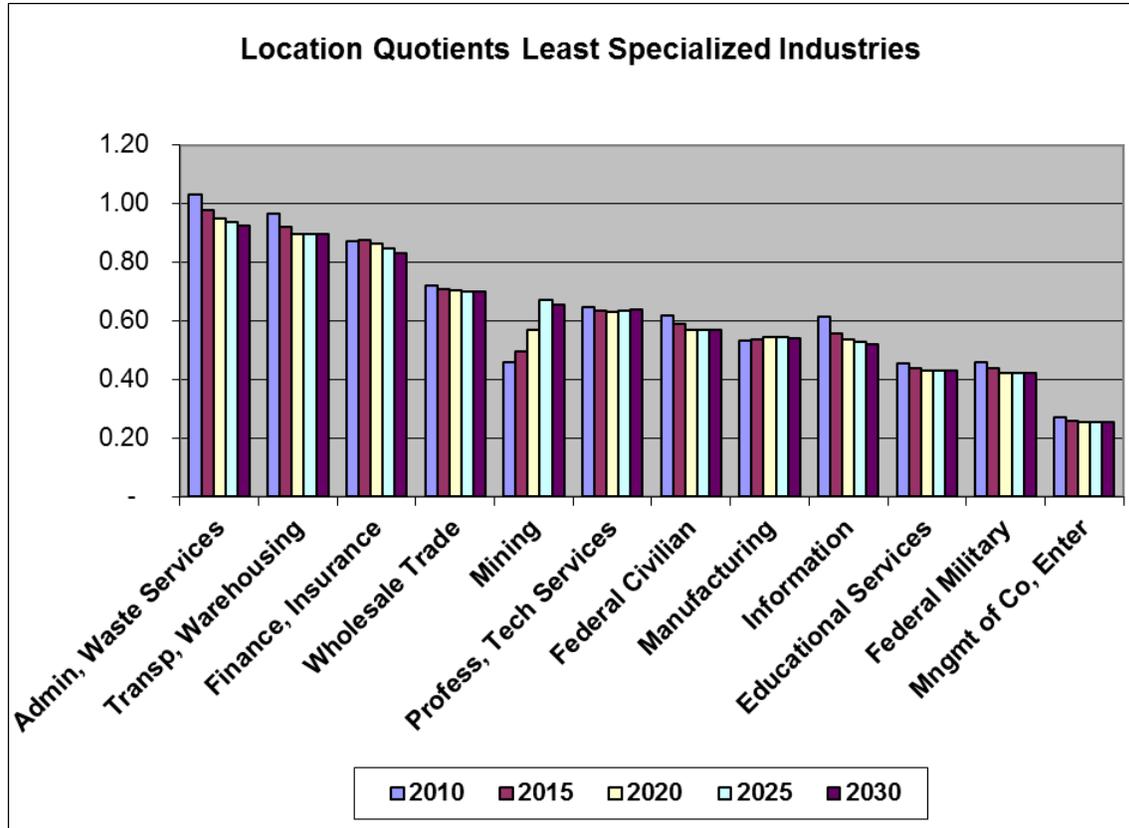
Source: WRPC, REMI, 2012.

As already demonstrated by the shift share analysis, examination of the location quotient shows leading regional industries to be those closely linked to population growth. This includes the service sector as well as construction and real estate. Analysis reveals slowing growth or declines in each of these industries by 2030. Another category of regional industries strongly represented are primary industries which include extractive, natural resource based activities. Important primary industries in the Region would be forestry/fishing. Analysis indicates the industry will experience decline over the next several decades. For economic development purposes, a possible best course of action would be to pursue strategies that reinforce existing areas of strength, while seeking opportunities to diversify the regional economic base—especially into new industry and away from reliance on the land development and primary industry sectors.

Many industries scored poorly, showing weak presence in the Region. As represented by a value of less than one, these are industries where the regional concentration is less than what is found nationally. Chart 5 summarizes.



CHART 5.



Source: WRPC, REMI, 2012.

Those industries less strongly represented in the Region tend to exhibit a likelihood of decline over the 2030 analysis period. Only the government employment sector shows a strong pattern of increase through the next decades. A number of industries show a notable pattern of decline. These include the waste services/administration, transportation, finance and insurance, information and wholesale sectors. Of the more weakly represented industries, only manufacturing and mining show a recovery toward the end of the planning period.

**STRATEGIC FINDING:** The shift share and location quotient analysis confirm projected economic growth in the Region originating from sectors most closely associated with population growth. Regional weakness in job creation (as isolated by the shift share analysis) and an end to rapid growth in those industries related to population increase (as identified by the economic base analysis) suggest future growth will need to come from other parts of the regional economy. Clearly, the solution is to diversify the Region’s economic activity. This means regional economic development should encourage activity in non-base sectors, because by definition these are the segments of the economy where the Region has been historically under-represented and change would lead to the largest amount of improvement.



For this approach to be successful, regional economic development should enhance positive localization and urbanization effects. In other words, regional economic development projects should function to start a positive feedback loop. Individual economic development projects will act to start growth where it would not otherwise occur. Increased private sector investment will follow. Business will see greater profitability, a result of more substantial links between neighboring firms. Still other regional advantages will compel more firms to locate in the Region, reinforcing the positive trend. Over the long-term, a planned program of regional economic development will even work to support the real estate, retail trade, construction and service sector as new businesses and their labor force function to heighten consumption of goods and services from all sectors of the regional economy.

Consequently, regional economic development should focus limited resources on projects in sectors where the Region has compelling advantage. Advantage could come in the form of competitive strength. For example, regional economic development could focus on development projects within the Region's manufacturing sector which will add jobs over the next two decades while the nation loses employment in this sector, or it could come from regional attributes such as central location, providing valuable north/south and east/west access to facilitate transportation/warehousing and wholesale trade activity. Proceeding from a position of advantage based on regional attributes will provide the best chance that economic development projects will prove catalytic, creating sustained benefits vastly in excess of project investment.



## SIX PILLARS INTRODUCTION

Our nation, state and local communities are at a significant point in history. During this time of economic recovery, those in the public and private sectors are all being confronted with demands to provide goods and services at less cost and with fewer resources. Enlightened local leaders agree that we must quickly transition to a knowledge-based economy to prosper. We must also create greater opportunities for everyone to share in the American dream.

Despite the many challenges, we are truly fortunate to live, work and play in Withlacoochee Region. Our future is bright, providing that business, civic and government leaders commit to change, intelligently seek innovative solutions, and collaborate in unprecedented ways to share scarce resources as genuine "community partners."

The Comprehensive Economic Development Strategy refinements were created by integrating the Florida Chamber Foundation's "Six Pillars of Economic Development" to focus on how the Region will participate in the economy of the future. Most importantly, this is a plan that reflects where our state and local leaders believe we need to go in the coming years to achieve a shared vision of high-wage jobs, global competitiveness and vibrant communities. The Withlacoochee Regional Planning Council through the Comprehensive Economic Development Strategy will move in concert with the Six Pillars statewide initiative.

The Withlacoochee Region's long-term economic viability requires revisiting the full spectrum of economic factors designed to position the Region as a collection of vibrant communities offering the prospect of higher-paying jobs as a participant in a global economy. It is acknowledged that any strategic planning process must build on previous efforts and cast a wide net to align the business community with a vast array of partners, including civic and cultural leaders, in a collaborative effort to address the fundamentals of economic change.

The result of these considerations is presented in this document as a first iteration of the Withlacoochee Region's Six Pillars Policies.

## THE SIX PILLARS FRAMEWORK

The product of years of collaboration and research by the Florida Chamber Foundation and partners, the Six Pillars framework identifies the critical factors determining Florida's future:

- (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

**Talent Supply and Education:** The Withlacoochee Region needs to increase the capabilities and creative capacity of the existing workforce. The transition to a more knowledge-based and



innovative economy will require a highly skilled and educated workforce. Within the next two decades, new products and services will be developed to address the world's most pressing environmental, medical and transportation challenges. The communities where those breakthroughs originate will reap the economic rewards of leadership. Without a thriving base of knowledgeable workers, that place may not be Withlacoochee Region. The development of the Region's future workforce must utilize education and training as its foundation.

**Innovation and Economic Development:** Too often relegated to the academic realms of research institutions, innovation must also include the partnership of business and education. Emerging economies of the 21st century will be based on technology, knowledge and innovation. Transforming our existing business base is the key to retention and expansion. Economic development tied to innovation requires a comprehensive understanding of what is necessary and prudent to incentivize business growth. Demands for return on investment have never been greater. A fluid view of the role of innovation and economic development that allows existing businesses to incorporate new technology is paramount.

**Infrastructure and Growth Leadership:** This Pillar underscores the fundamental contributions of factors such as transportation, energy, water and land use to a vibrant Withlacoochee Region economy. The Region's long-term economic health can be undermined if infrastructure issues are not addressed. Investments in air and sea ports are expected to capture increased growth in international trade. Investments in inland and rail ports will increase domestic trade opportunities. Addressing congested and deteriorating roadways and railways will spur intra- and inter-state commerce. Unchecked sprawl threatens the sufficiency of water and energy. In contrast, smart and timely investments in a network of sustainable infrastructure connecting viable communities are the formula for shared economic prosperity throughout the Region.

**Business Climate and Competitiveness:** Owners and executives making decisions about where they call home evaluate the Withlacoochee Region's attractiveness in respect to its competitiveness across a host of factors. The Withlacoochee Region needs to improve its position in emerging industry clusters; its openness and growth in international trade; and its general hospitableness to entrepreneurs and small businesses. Fortunately, the Withlacoochee Region ranks well owing to low general business costs and moderate taxes. The Region should continue to secure its reputation as a business-friendly climate.

**Civic and Governance Systems:** Governmental institutions focus to deliver services, set rules that organize business and society, and provide vehicles for the public to engage, influence, and change the way society works. These include things like providing predictable regulatory systems, ethics and elections, public involvement, government spending and more. The local governments of the Withlacoochee Region should show leadership across these areas and create an overall sense of fairness and ethics that earns respect from citizens and the business community.

**Quality of Life/Quality Places:** The importance of "place" as an integral component of prosperity cannot be overstated. Employment markets have shifted from businesses that stayed in an established, predictable location to the current cohort that selects geography first



and then locates the new business enterprise based on a variety of factors including quality of life. The Withlacoochee Region's economic future will benefit by the preservation or enhancement of a wide range of integrated elements and natural resources that together express the character of our culture and the perception of those things that make us healthy, happy, safe, comfortable and involved.

### **THE ROLE OF MEASUREMENT**

The Withlacoochee Region's implementation of elements of the Six Pillars framework includes a commitment to measuring our current status and progress toward stated goals. Uniform indicators are associated with each of the Pillars to use as a barometer for conditions in the Region. Measurement is an objective way to get a snapshot in time for community conditions. Resulting trend analysis from consistent monitoring will provide cues for the evolution of CEDS strategies.

### **SUPPORTING THE STATE'S STRATEGIC PLAN**

The Withlacoochee Region and all of the Regional Councils in Florida are participating in the larger mission of supporting a dynamic strategic business plan for the State of Florida. The Six Pillars structure was first originated through lengthy stakeholder forums by the Florida Chamber Foundation. Further input from stakeholder groups is being formulated by the Florida Department of Economic Opportunity as a part of the overall process of plan development. The Six Pillars structure is being adopted by a wide variety of local governments and economic development interests statewide. The development of Six Pillars Community Plans by communities across the state will provide greater resolution and specificity than State or regional approaches. The Withlacoochee Region shares the benefits of participating in a common agenda with established indicators providing a path to economic improvement.



## CEDS GOALS AND OBJECTIVES - BUILDING THE PILLARS

### TALENT SUPPLY & EDUCATION - GOALS

**GOAL 1** DEVELOP A WORKFORCE PREPARED TO ADD VALUE AND ALIGNED TO MEET OR EXCEED THE PROJECTED NEEDS OF THE EMPLOYER BASE

- Objective 1.1** Promote the Advancement of Science, Technology, Engineering Arts and Mathematics (STEM) education to meet or exceed state/Region workforce projected needs
- Objective 1.2** Coordinate with private sector to establish collaborative curriculum development to implement innovative workforce training solutions
- Objective 1.3** Organize a systemic alignment of business development, business industry clusters and workforce initiatives
- Objective 1.4** Support efforts to expand education programs in healthcare related fields and create a marketing strategy to promote enrollment in health professions programs

**GOAL 2** DEVELOP A HIGH QUALITY EDUCATION SYSTEM RECOGNIZED FOR INNOVATIVE APPROACHES TO CURRICULUM

- Objective 2.1** Promote the expansion of adaptive strategies for education systems and recognize model programs
- Objective 2.2** Increase the number of schools that incorporate workforce development programs
- Objective 2.3** Improve access to and attainment of education and training programs for talent throughout the region

**GOAL 3** INCREASE COLLEGE AND CAREER READINESS AND COMPLETION

- Objective 3.1** Increase the graduation rate at high school and post-secondary levels
- Objective 3.2** Develop internship and externship opportunities for graduating students

### INNOVATION & ECONOMIC DEVELOPMENT - GOALS

**GOAL 1** PROMOTE THE EXPANSION OF BUSINESS RECRUITMENT, RETENTION, AND TARGETED CLUSTERS TO REALIZE GREATER CAPITAL INVESTMENT

- Objective 1.1** Rebrand the Withlacoochee Region by utilizing public relations and marketing efforts to be implemented by local stakeholder groups
- Objective 1.2** Expand strategies to allow for a more international scope

**GOAL 2** ENHANCE BUSINESS RETENTION TO RETAIN 100% OF EXISTING BUSINESSES

- Objective 2.1** Leverage regional assets as resources for retention



**Objective 2.2** Strengthen public/private partnerships to provide community support for existing businesses

**GOAL 3** CREATE AND EXPAND INNOVATION CENTERS AND BUSINESS INCUBATOR SITES

**Objective 3.1** Plan for and create attractive business hubs with innovative site planning and development

**Objective 3.2** Monitor existing technology centers, successful new technologies and venture capital trends for early detection of opportunities

**INFRASTRUCTURE & GROWTH LEADERSHIP - GOALS**

**GOAL 1** PROMOTE AND ENHANCE COORDINATION OF REGIONAL TRANSPORTATION INFRASTRUCTURE TO REDUCE CONGESTION AND COMMUTE TIMES

**Objective 1.1** Develop Region-wide growth scenarios that illustrate the benefits of a coordinated infrastructure strategy

**Objective 1.2** Promote a proportionate balance of funding for physical roadway improvements and mass transit operations

**Objective 1.3** Increase numbers of airport operations

**Objective 1.4** Facilitate coordination of freight and port activity

**GOAL 2** INCREASE LONG-TERM SUSTAINABILITY OF REGIONAL WATER SUPPLY

**Objective 2.1** Increase opportunities for alternative water supply in the Region

**Objective 2.2** Promote reuse of wastewater within the Withlacoochee Region

**Objective 2.3** Identify new water treatment technologies to increase the efficiency and cost effectiveness of alternative water supply

**Objective 2.4** Develop incentives for projects to use xeriscape landscaping and native planting

**GOAL 3** IDENTIFY TARGETED REDEVELOPMENT AND INFILL STRATEGIES TO PROMOTE EFFICIENCY OF LAND USE AND INFRASTRUCTURE

**Objective 3.1** Balance growth patterns to minimize environmental impact and improve worker accessibility

**Objective 3.2** Expand the range of housing choices for all income levels

**GOAL 4** INCREASE INVESTMENT, INNOVATION AND EFFICIENCY OF ENERGY RESOURCES

**Objective 4.1** Explore and adopt standards to permit renewable and alternative energy development

**Objective 4.2** Explore opportunities to adopt feed-in tariffs to stimulate implementation of energy technology and energy resiliency



**GOAL 5** CREATE AND EXPAND TECHNOLOGICAL INFRASTRUCTURE

- Objective 5.1** Extend broadband services throughout the Region
- Objective 5.2** Establish wi-fi availability in central business districts and where greater development intensity is desired

**BUSINESS CLIMATE & COMPETITIVENESS - GOALS**

**GOAL 1** STREAMLINE REGULATORY PROGRAMS

- Objective 1.1** Provide businesses with a set of uniform and predictable regulatory standards
- Objective 1.2** Reduce processing times for permits and approvals

**GOAL 2** MONITOR THE COSTS OF DOING BUSINESS AS RELATES TO OTHER COMMUNITIES

- Objective 2.1** Promote the assessment of business costs using a uniform methodology
- Objective 2.2** Explore opportunities for cost incentives where higher business costs are rational and equitable

**CIVIC & GOVERNANCE SYSTEMS - GOALS**

**GOAL 1** IMPROVE VOTER AND BUSINESS TRUST IN GOVERNMENT

- Objective 1.1** Increase stakeholder participation in community forums
- Objective 1.2** Leverage and create programs to connect community leaders and government officials
- Objective 1.3** Broaden inclusiveness in all civic endeavors to include diverse voices and interests

**GOAL 2** EVALUATE LOCAL GOVERNMENTS OPERATIONS FOR MOST EFFICIENT SERVICE DELIVERY

- Objective 2.1** Use information technology to improve services, promote efficiencies and eliminate redundancies
- Objective 2.2** Use customer service feedback to evaluate programs

**QUALITY OF LIFE & QUALITY PLACES - GOALS**

**GOAL 1** SUPPORT, PROTECT AND ENHANCE THE REGION'S NATURAL AND CULTURAL ASSETS IN A SUSTAINABLE MANNER

- Objective 1.1** Create guidelines and incentives for quality, sustainable development that preserves natural and cultural assets
- Objective 1.2** Enforce current legislation that protects our natural and cultural assets



- Objective 1.3** Promote and protect a resource-based geographic brand for the Region
- Objective 1.4** Nurture and promote local cultural events and small emerging arts and cultural organizations

**GOAL 2** CREATE A DIVERSE RANGE OF VIBRANT, QUALITY NEIGHBORHOODS THAT ARE SAFE, AFFORDABLE AND ATTRACTIVE

- Objective 2.1** Increase density of housing in specific target employment centers and housing located near public transportation hubs in Withlacoochee Region
- Objective 2.2** Promote crime prevention through environmental design standards for development in urban areas
- Objective 2.3** Strengthen the role of community-based development organizations

**GOAL 3** SUPPORT AND DEVELOP HIGH-QUALITY MEDICAL CARE AND EXCELLENCE IN INDIVIDUAL HEALTH OUTCOMES

- Objective 3.1** Attract, support and retain a high quality infrastructure of medical facilities and personnel
- Objective 3.2** Promote economic rationale for health and wellness practices
- Objective 3.3** Seek ways to better serve the medical and health interests of the aging population of the Region



## SIX PILLARS MEASURES

### TALENT SUPPLY & EDUCATION

Average Annual Wage  
High School Graduation Rates  
8th Grade Math Performance  
# STEM education programs administered in the Region  
Percentage Increase in the Number of Schools Incorporating Workforce Development Programs  
School Graduation Rate Per School District and the Region

### INNOVATION & ECONOMIC DEVELOPMENT

Gross Domestic Product  
Trade Exports and Imports

### INFRASTRUCTURE & GROWTH LEADERSHIP

Population Counts, Estimates and Projections  
Changes in Land Use  
Vehicle Miles Traveled  
Rate (percentage change over time) of Flight Operations Per County and in the Region  
Rate (percentage change over time) of Gallons Per Day from Alternative Water Supplies versus All Water Supply in the Region- data from RWSP  
#Cost-burdened Households  
% Increases in Broadband Connections

### BUSINESS CLIMATE & COMPETITIVENESS

Average Annual Unemployment Rates  
Employment by Industry  
Wages by Industry

### CIVIC & GOVERNANCE SYSTEMS

Millage Rates  
Voter Participation

### QUALITY OF LIFE & QUALITY PLACES

Per Capita Income  
House Purchase Price and Cost Index  
Persons Living in Poverty  
Rate of Travel Time to Work



## **CEDS PLANNING, DEVELOPMENT AND REVIEW PROCESS**

The Comprehensive Economic Development Strategy (CEDS) for the Withlacoochee Region is the result of an on-going planning process designed to guide and support economic growth in Citrus, Hernando, Levy, Marion, and Sumter Counties. The CEDS relies upon broad and diverse community participation to respond to the demands of ever changing, national, regional, and local economies.

Organization of the planning process for the CEDS re-write was undertaken to ensure participation occurred in agreement with program guidelines. The CEDS planning process embraces broad participation from a diverse group of interests within the planning organization's Region. A particular tenet of the CEDS approach is that participation must be representative of the local business community with the intent of helping to create public and private partnership. Therefore, private sector participation is imperative.

Under the CEDS, an assembled coalition of regional economic development stakeholders organizes into a Strategy Committee to formally sanction the plan document. Economic Development Administration (EDA) requirements specify that business and industry representatives form the majority of Committee membership. It is public participation and review of the CEDS document that makes it meaningful. This section provides a discussion of participation in the CEDS plan re-write process.

Formation of the Strategy Committee sought to emphasize private sector stakeholder participation. Early in 2012, local economic and business development offices around the Region were asked to mention the coming revision of the CEDS plan within their service areas. The hope was that promotion of CEDS from a familiar, trusted source would increase knowledge of the opportunity to participate among the private sector. In a similar fashion, county chambers of commerce were also contacted and asked to represent their private sector constituency, as well as pass along the invitation to their membership. At the same time, local government participation was pursued. Program requirements were explained, and local governments were given latitude to appoint a representative of their choosing.

The Withlacoochee Regional Planning Council's Board was kept informed of the CEDS planning process. The WRPC Board of Directors includes members of private industry, appointees, and representatives from all of the Region's communities. Additionally, some WRPC Board members have prior knowledge of CEDS and the Economic Development District's activities. Accordingly, efforts were made to obtain their expertise.

Resulting from this organized effort to secure broad regional participation, a Strategy Committee of fourteen (14) individuals was organized to oversee the rewriting of the CEDS plan. Private sector membership on the Committee consisted of nine (9) individuals or exactly 64.0% of the total membership.

Public notice was duly given for the annual CEDS Strategy Committee meeting. The meeting was held on July 26, 2012. Notice was advertised over the course of several business days in a



wide circulation, regional newspaper with the agenda of the meeting available in advance. The meeting was also noticed in the Florida Administrative Weekly and announced on the District's website. The intent was to try and raise knowledge of the CEDS process among the general public. Accommodations were made at all CEDS Strategy Committee meetings to handle a public audience.

Beginning on July 19, 2012, a draft of the revised CEDS document was placed on the District's website. Information on the website stated that the revised CEDS plan document was available for public comment and review for a period of at least 30 days, per EDA requirements. That notice remained on display until September 20, 2012. At such time, the WRPC Board of Directors approved transmittal of the 2012 CEDS rewrite to EDA.

As described above, the document was made widely available for public review and comment under a planning process structured to invite public participation. District staff took actions to encourage public review of the document. However, no comments were received from the public at large.

Strategy Committee members reviewed the document prior to their final meeting. Comments regarding CEDS plan content were received from the Strategy Committee. These comments were reviewed and prompted revision to plan content.

Two formal meetings were held by the Strategy Committee during the CEDS re-write process. The specific activities of the meeting included the following:

#### **STRATEGY COMMITTEE MEETING 1: JULY 26, 2012**

**Strategy Committee Membership** - It was suggested that the membership of the Strategy Committee could include alternate representatives. There appeared to be general consensus to the appointment of alternate representatives as long as the alternate was approved by the executive body that was being represented.

**Background of the CEDS Process** - Staff presented an overview of the role of the Strategy Committee in the process of coordinating the 5-year update.

**2012 CEDS - 5-Year Update** - Staff presented new information and analysis created for the CEDS update. A disc containing the Draft document for review was distributed to those present.

**Six Pillars Framework for Economic Development** - The Committee was generally receptive to the inclusion of Six Pillars policy language in the CEDS document. It was suggested that staff review performance indicators to insure they were relative to the goals and objectives.

**CEDS Action Plan Review (projects list)** - Staff thanked the members for updating their projects and the group allowed for additional revisions or new projects to be



submitted. Group discussion included the need for specificity in CEDS project descriptions. It was concluded that any future grant applications will provide project specificity; therefore, the project description for inclusion in the CEDS document can be general.

**CEDS Strategy Committee Recommendation** - Recommendations on document content were deferred to an August meeting.

## STRATEGY COMMITTEE MEETING 2: AUGUST 23, 2012

**Background of the CEDS Process** - Staff presented an overview of the role of the Strategy Committee in the process of coordinating the 5-year update. The document is scheduled to be presented to the WRPC Board of Directors on September 20.

**New Un-reviewed changes** - Staff detailed the components of the agenda packet including new proposed document contents and the sources of input since the last meeting including: review comments coordination with RPCs statewide, correspondence with DEO, and local government input.

New proposed additions to the CEDS document include : New projects; Additional economic indicators; Revised text based on review comments; New objectives; New Six Pillars measures; and a Summary of DEO strategies based on “first round” statements;

**CEDS Action Plan Review** - The Strategy Committee reviewed and discussed the four new projects. Staff provided a definition of the term “vital” from EDA guidance. Discussion of the application of the definition resulted in group consensus that all projects included in the CEDS are considered vital projects.

**CEDS Strategy Committee Recommendation** - Discussion of new plan content resulted in the Strategy Committee directing staff to review the reporting methodology for reporting tourism development revenues and to delete the table if a consistent reporting format can't be determined. Staff was also directed to ensure that the document addressed both education and training as important components of workforce development. Following ensuing discussions, the Strategy Committee formed consensus for the document to move forward for consideration of approval by the Planning Council.

Closing discussion centered around the next steps in the EDA grant funding process. It was established that the Action Plan projects were listed in no particular order and that each project would be measured on its own merits. The grant application is the point where correspondence with EDA is initiated.



**Other Business** - Staff informed the Committee that the next meeting will be in July 2013 for the purposes of proposing new projects and reporting on the progress of existing projects.

In the process of document preparation, previous CEDS plan content has been updated, revised or retained to provide trend analysis, but most of the past plan data was replaced with new and current data. EDA training materials were utilized in the development of the CEDS document. To determine best practices, economic development district staff from planning organizations around the state of Florida communicated on issues of common concern. In particular, the question of how to prepare 11 consistent CEDS document representing all of the EDDs in Florida. Every effort was made to ensure that consistency was maintained with the activities of other planning organizations. However, each region is different and each CEDS is guided by a different Strategy Committee. Therefore, it should be assumed that there will be differences. The Six Pillars framework as advanced by the Florida Department of Economic Opportunity provides a common policy theme.

It is the intent of the CEDS Strategy Committee for the Withlacoochee Region to assign vital status to all projects. EDA separately evaluates whether, or to what extent, each CEDS project is competitive under the Public Works and Economic Development program at the time of application. Projects that do not receive funding through the Public Works and Economic Development program, or are not competitive under grant criteria, still have a useful role in helping to inform future CEDS plan development. District staff suggests the CEDS process may be a useful mechanism by which to help establish consensus about programs leading to development of support structures for regional economic development initiatives beyond providing funding through EDA Public Works Investments.



## 2012 ACTION PLAN PROJECTS

This section consists of an Action Plan describing the way CEDS Goals and Objectives will be achieved through project and program implementation. All vital and suggested projects are listed, and a brief outline of summary information is included. A disclosure of project tasks and responsibilities completes each project overview. The Action Plan ensures that CEDS Goals are quantifiable and measurable. The main purpose of this section is to describe how the CEDS will accomplish its program of positive economic change through project development.

In the context of this current period of project funding challenges, the prospect of assistance through EDA's Public Works and Economic Development Grant Program takes on renewed importance. Local governments continue to face unprecedented challenges to pursue job creation initiatives and develop policies to incentivize growth. Local governments also face mounting pressure to influence results in a difficult business climate. Now more than ever, local governments can benefit by participation in the CEDS process as a means to help identify and prioritize projects that demonstrate a commitment to higher-wage/higher-skill job creation through entrepreneurship, innovation and creativity. District staff works with CEDS process participants to identify competitive projects that help implement the CEDS strategic findings.



2012 CEDS Project Summary Sheet

Project	Sponsor	
College of Central Florida - Levy Campus	CF	Facility & Infra.
Ameris Heath Systems regional (Tri-County) hospital	Chiefland	Infrastructure
Site Development & Extension of Utilities to a 400 acre CSX Rail-Serviced Parcel	Hernando County	Infrastructure
Ocala Business Park at Ocala International Airport	Ocala	Infrastructure
McGinley Property Commerce Park	Marion Co	Infrastructure
Siemens Heart of Florida Business Technology Campus	Marion Co	Infrastructure
Williston Airport Industrial park	Williston	Infrastructure
Florida Crossroads Industrial Activity Center	Sumter County	Infrastructure
Site Development at industrial park(s) to be located on Anderson Snow Road	Hernando County	Infrastructure
Site development at SW Airport Industrial Park.	Hernando County	Infrastructure
Site Development Cobb Road Area in Brooksville	Brooksville	Infrastructure
Inverness Airport Business Park and Incubator	Citrus County	Infrastructure
The Florida Agriculture Center and Horse Park Authority	Horse Park Auth.	Site Development
Site development & provision of utilities for 300 acre industrial park corner of SR 326 & CR 25A	Marion County	Infrastructure
Institute for Human & Machine Cognition (IHMC) Ocala Facility Expansion Project	IHMC	Facility Improvements
Central Beef Industries Facility Expansion	Sumter	Infrastructure
Ocala-Marion County Commerce Park (a.k.a. Magna Project) (Owner: Ocala 489 LLC)	Marion Co / Ocala	Infrastructure
North Central Florida Regional Agriculture & Civic Center: Southeastern Livestock Pavilion	Marion Co	Site Development
SW 44th Avenue Roadway Improvements	Ocala	Infrastructure
Providence Boulevard Commercial/Light Industrial Area	Brooksville	Infrastructure
Silver Springs Park and Redevelopment Area	Marion County	Infrastructure
Marion County Extension Small Farm Initiative	Marion County	Site Improvements
484 Industrial Park Initiative	Marion County	Infrastructure
Beverage Innovation Center Project	Marion County	Facility & Infra.
Power Plant - Accelerate Ocala Incubator	Ocala/Marion Chamber	Facility Expansion
SE 92nd Loop Phases 1 & 2 Roadway Improvements	Marion County	Infrastructure
SW 95th Street - Phase 3B Roadway Improvements	Marion County	Infrastructure
Ford of Ocala Expansion Project	Ocala/Marion Co. EDC	Infrastructure
CF added Marion Co Campus	CF	Land & site improvements
Aviation Industry Site Development	Hernando County	Infrastructure
College of Central FL - Global Center	CF	Facility & Infra.
Wildwood ALF Utility Extension	Wildwood	Infrastructure
Port Citrus Infrastructure improvements	Citrus County	Infrastructure
Citrus County Medical Corridor	Citrus County	Infrastructure
Lake-Sumter CC - Workforce Innovation and Education Center	Sumter County	Facility & Infra.
Hernando County Broadband Wireless expansion	Hernando County	Tech Infrastructure



ACTION PLAN			
Project <i>(Owner/developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>College of Central Florida (CF) New Levy County Campus</b>	Total Cost: \$17 million	\$1 million (Annual Operating Cost)	1. Identify best expansion option (done)
	State: Up to \$14.5 million		2. Florida’s state legislature must make appropriation to support the project at a site near Chiefland, Florida (Done twice but vetoed twice; now targeted for 2013)
	Capital Campaign		3. From 2013 to 2017, construct necessary infrastructure, road access drainage, water/sewer
	Gap Financing from Private Funding Sources		4. The initial 22,000 sq. ft. class/meeting room facility will be completed by 2017

**Tasks/Parties Responsible:**

This project would create a permanent community college facility in Levy County, replacing a 14,000 square-foot storefront space, which the College of Central Florida currently uses to conduct workforce training. Storefront space is at capacity and cannot be reasonably expanded. Total construction costs equal \$17,000,000 with a significant amount of funding sought from the state. CF will begin a fundraising effort to address the funding gap through private sources. An endowment for operating costs has already been created with assets over \$2.5 million.

In summary, the scope of project activity includes steps to expand site capacity, develop necessary infrastructure (vehicle and pedestrian circulation, parking, drainage, water and wastewater treatment) and construct a permanent structure with classrooms, laboratory, instructional support spaces (library, audio-visual and auditorium/exhibition space), offices, restrooms and other support spaces. Over 22,000 square feet for state-of-the-art classrooms and a large community meeting space would constitute the physical extent of the structure. Moreover, the center needs a library, student service areas and additional offices to effectively offer quality instruction to the community, and there is no space within the storefront to develop a much needed vocational program.

CF has an established reputation for creating alliances in the community to enhance educational programs and economic impact. By offering programs to align workforce and economic development needs, CF will continue growing and changing to meet the needs of Levy County, the Region, and the marketplace – providing a bridge between students seeking a pathway to a career and employers seeking an educated and well trained workforce.

To date, area residents have donated 15 acres of land to CF for the purpose of constructing the proposed stand-alone college center. And the college has purchased an adjoining additional 25 acres. The Florida Legislature should act to appropriate funds for purchase of additional property at the site.



ACTION PLAN			
Project <i>(Owner/developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Ameris Heath System’s regional (Tri-County) rural hospital to be located in the City of Chiefland, Florida</b>	Total Cost \$32,million	\$50 million (Annual Operating Cost)	1. requires widening of CR 320, resurfacing left turn lane, and improved emergency signaling by January of 2008
	Florida: \$812, 306 - Grant \$650,000		2. Active construction phase to be complete on or before end date April 3, 2013

**Tasks/Parties Responsible:**

Ameris HealthCare Systems, Inc., a rural hospital service provider, proposes to build a regional hospital in Chiefland, Florida. The Hospital will provide full service rural healthcare to Levy, Dixie and Gilchrist Counties. State and county funding exists in the amount of approximately \$1 million and functions as an economic development incentive for the project. This amount should cover some of the infrastructure costs associated with project development. The project area is located within a State of Florida Rural Enterprise Zone.

To accommodate the hospital at that location, various infrastructure improvements will be needed onsite and in the vicinity. County Road 320 will be widened and resurfaced. A left turn lane will be needed to yield access to the site from the roadway. There is also a need for traffic signaling at the intersection adjacent to the hospital. Provision will need to be made for water, sewer, and electrical infrastructure as well.

The tri-county hospital will provide sixty (60) beds. It will feature an emergency room and other hospital services such as obstetrics, surgical services, dental care, dietary/nutritional aid, nursing care, physical therapy, medical imaging, and an intensive care unit (ICU). In addition, the site will host accessory uses such as a pharmacy and laboratory facilities. Hospital management and administration will require office use and support services be coordinated in the hospital building.

The Chiefland Hospital should produce 355 jobs. Job creation will be spread over an approximately five (5) year period after construction is complete in 2010. Year 1 should see 228 jobs created, followed by an additional 59 in year 2, and finally 20 and 30 in years 4 and 5, respectively.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Site development and extension of Utilities to a 400 acre CSX Rail-Serviced Parcel located in Hernando County</b>	\$3 million	NA	1. Provide necessary infrastructure. 2. Develop industrial use onsite by 2014

**Tasks/Parties Responsible:**

The project proposes to facilitate industrial land development of a 400 acre parcel adjacent to CSX owned freight rail line. The scope of the project is to provide vital infrastructure to the subject property in order to enable industrial use. Total project costs are currently estimated at \$2,000,000. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve significant capacity enhancement of the Region’s industrial base, owing to the large scale of any future development. The cost estimate covers a budget for infrastructure provision to the site.

The subject property is located generally in the vicinity of State Road (SR) 50 and Highway 301 in Hernando County, FL. It is privately owned and maintains the ability to host freight rail access. A variety of infrastructure improvements would be required to make the site suitable for industrial use. Water and sewer lines require extension to service the site. Roadway improvements would appear necessary. A rail spur may be needed depending on the end user.

As a large greenfield site, there is much potential to find a major industrial user. The site is benefitted by easy north/south access along Highway 301 and east/west access along SR 50. The site also provides convenient access to Interstate 75, running north/south through the Region. Access to multiple high capacity roadways complement potential rail spur service to produce a very attractive arrangement for the right industrial user. Furthermore, the east/west access provided by SR 50 is particularly valuable in the context of the state of Florida, given its unique geography and a ground transportation system that provides limited opportunities for freight movement across the state along an east/west route. Estimates of total job creation range from 500 to 1,000 jobs.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Ocala Business Park at Ocala International Airport</b>  Owner: City of Ocala	\$4,500,000	NA	Phase One: Design underway  Phase Two: Permitting November 2009  Phase Three: Construction Start March 2010 Construction End December 2010

**Tasks/Parties Responsible:**

The City recently established the Ocala Business Park at Ocala International Airport and is actively seeking development proposals for all or part of the 600+ acres. The Park is located on SR-40 within 2 miles of I-75, in close proximity to US-27, US-441-301, SR-200, and within the Florida High-Tech Corridor. Upon build-out the proposed development may include over 2,000,000 square feet of building space valued at over \$125,000,000.

A traffic study has been completed, land use and zoning entitlements are in place, City water, sewer, electric, and fiber are available, and the City is extending SW 67th Avenue to SR-40 along with infrastructure at an estimated cost of \$4,500,000. The City is pursuing funding assistance for a variety of other infrastructure improvements necessary to support development at an estimated cost of \$3,000,000. The City is also working to establish a business incubator and master storm water retention system the costs of which have not yet been quantified. The City is also discussing the possibility of a cooperative effort to market and develop other adjacent privately owned land including 1,800 acres (part of the On Top of the World Development) to the south- the details and costs of which have not yet been quantified.

The purpose of this project is to create "shovel ready" sites to facilitate development including the attraction of a large distribution center (1-2 million square feet under roof) among others which will lead to job creation. This is meant to address the current Marion County unemployment rate of 12% resulting in 18,000 out of work. The project involves a multi-year build-out resulting in the creation of approximately 5,000 new jobs, wages in excess of the Marion County median income, and an annual payroll in excess of \$150,000,000. This is meant to address the fact that current projections indicate that 168,000 new residents will be moving into Marion County by 2035 resulting in the need for at least 63,000 new jobs and 4,500 acres of additional commercial-industrial zoned property.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>McGinley Property</b> Owner: McGinley Family Limited Partnership	\$17,500,000	N/A	1. Provide transportation infrastructure improvements
			2. Develop all or part of the site for commerce park by 2015

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development of a commerce park located in southern Marion County. The scope of the project is to provide necessary transportation infrastructure in order to support development of the site as a commerce park. Total project costs are currently estimated at \$17,500,000. Project costs include, widening CR 484 from Marion Oaks Pass to Marion Oaks Course (1.8 miles) and constructing a local divided boulevard (3 miles) from SW 128<sup>th</sup> Street to SW 60<sup>th</sup> Circle. The projected costs are contingent on the right-of-way for the boulevard being donated to the County. Operating costs are not known at this time as an end user has not been identified.

The McGinley project is located approximately 3 miles west of the intersection of Interstate 75 and CR 484. The project could potentially encompass the entire 1,280 acre site. The project goals are focused on diversifying the local and regional economy through the development of the Region’s industrial base. Potential industries include transportation and warehousing, clean manufacturing, and distribution. Further, due to the potential scale of the project, there is potential to dramatically increase the Region’s industrial base and create a truly regional employment center.

The McGinley project has several positive factors that should be considered in evaluating the site’s development potential. Central water and sewer are available at the site and are provided by the Marion County Utilities Department. The project is also located in close proximity to Interstate 75, adding to the project’s potential for warehousing and distribution. CR 484 is an east/west arterial highway that connects Interstate 75 with SR 200 another north/south arterial. The McGinley site is identified as a Future Employment Activity Center in the Economic Element of the Marion County Comprehensive Plan.

Current projections indicate that 168,000 new residents will move into Marion County by 2035. This migration will create a need for roughly 63,000 new jobs and 4,500 acres of additional industrial zoned property.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Siemens Heart of Florida Business Technology Campus</b>  Owner: Sunny Oaks Estates, LLC	\$12,500,000		Phase One 1. Construct transportation infrastructure Improvements  Phase Two 2. Develop site as a technology park by 2020

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development through the creation of a 453 acre business and technology park in northern Marion County. The scope of the project is to provide necessary transportation infrastructure in order to support development of the site as a technology park. Total project costs are currently estimated at \$12,500,000. Project costs include, widening CR 318 to a 4-lane divided highway from CR 225 to NW 66th Terrace (1.5 miles) and construction of a local divided boulevard (2 miles) with two intersections on CR 318. This boulevard would provide road access to the western, southern, and eastern portions of the site. Additional transportation needs include improvements for the Interstate 75/CR 318 interchange to accommodate widening CR 318. These improvements potentially include widening the Interstate 75/CR 318 overpass and adding turn lanes on CR 318. Operating costs are not known at this time as an end user has not been identified.

The project is located directly southeast of the Interstate 75/CR 318 interchange, on the south side of CR 318. The project could potentially encompass the entire 453 acre site. The project goals are focused on diversifying the local and regional economy through the development of the Region’s industrial base. Potential industries include clean manufacturing and medical technology and research. A recent economic sustainability study completed by Wilson Miller highlighted the vital need for new higher paying jobs in industry and technology related fields in the Region. This project seeks to address this critical shortfall through the creation of jobs with anticipated salaries above the County median income.

The Siemens project has several positive factors that should be considered in evaluating the site’s development potential. The project’s proximity to the University of Florida creates the potential for capturing technology transfers from biomedical research and related fields. The project is also located in close proximity to Interstate 75 and CR 318 a major east/west arterial. The project lies adjacent to a Specialized Commerce District and is identified as a Future Employment Activity Center in the Economic Element of the Marion County Comprehensive Plan.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Williston Airport Industrial Park</b>			1. Provision of site access, grading and pre-development enhancements (2010-2012)  2. Provision of needed utilities onsite or within the airport industrial park. (2012-13)  3. Infrastructure improvement facilitating industrial land development (2018-2020)

**Tasks/Parties Responsible:**

Significant opportunities exist at the Williston Airport Industrial Park. First, there is a substantial amount of land area designated as suitable and ready for development. The industrial park encompasses over 2,000 acres directly connected to US Highway 41/SR 45 and offers quick access to Interstate 75. Secondly, comprehensive and regional planning processes have identified Williston’s airport as a future job center. *The Strategic Regional Policy Plan for the Withlacoochee Region* supports industrial development at the Williston Airport. Moreover, both the City’s comprehensive plan and airport master plan define a vital role for the airport in potential future job creation, including potential for impact at the regional scale. While the Williston Airport industrial park may not achieve full build-out by 2020, it should be possible to create the conditions necessary to allow a number of large, commercial users to locate at the Williston Industrial Park over short-term.

Based on past development patterns at the airport industrial park, future commercial users could initially demand as much as 250,000 to 500,000 square feet of new gross floor area by 2020. Those figures reflect assumed prospects for two or three additional, large users locating at the park. Using the trip generation rates, developed by the Institute for Transportation Engineers (ITE), it is possible to convert floor area data to anticipated levels of employment. An estimate produced using this method indicates total future airport industrial park employment of between 500 and 1000 persons in the near-term.

In the long term, the City wishes to adapt the industrial park into an attractive location for the manufacture and production of technology innovations developed nearby at the University of Florida.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Florida Crossroads Industrial Activity Center</b>  Lee Capital, LP; Sumter, LLC; Monarch Ranch  Wildwood, Florida (SR 44 – US 301 to I-75)	Unknown	Unknown	1. Identify and Secure End-Users (2010-2015) 2. Obtain Development Permits for Lee Capital, LP, and Sumter, LLC properties (2011-2015) 3. Final Adoption of Large Scale Future Land Use Amendment for Monarch Ranch property (2010) 4. Development of Regional Impact Approval and Development Permits for Monarch Ranch (2010-2015) 5. Transportation Improvements (2015 to 2025) 6. Utility Connections and Improvements (2015 to 2025)

**Tasks/Parties Responsible:**

The “Florida Crossroads Industrial Activity Center” (FCIAC) is proposed to establish a major industrial employment center, with the potential to generate over 20,000 jobs over the next 20 years, at the literal crossroads of the State of Florida. The FCIAC is comprised of the SR 44 and Florida Turnpike Corridors from I-75 to US 301, with specific emphasis on the Lee Capital, LP (240 acres MOL); Sumter, LLC (180 acres MOL); and Monarch Ranch (2,800 acres MOL) properties. This area of the county was identified by the Sumter County Board of County Commissioners (Board) as a major future employment activity center through its Countywide Visioning process in 2008/2009 and its current Evaluation & Appraisal Report of the County’s Comprehensive Plan.

There are 3 million square feet of industrial land use entitlements on the Lee Capital, LP and Sumter, LLC properties. The Monarch Ranch property provides for an additional 16 million square feet of future industrial land use entitlements. These properties are located in a highly strategic area of the state with exceptional access to major state transportation facilities (I-75, US 301, SR 44, Florida Turnpike, and CSX freight-rail S-line). This combination of rail-freight access and major highway access is a major attraction for this area to develop as a key economic center for county, Region, and state.

At this time, there are no cost estimates for the cost of construction or operation for the FCIAC. These cost estimates will be determined as the properties within this area proceed through the development review process and the specific mitigation requirements are determined for transportation and specific utility needs are calculated.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
Site development at industrial park(s) to be located on Anderson Snow Road in Hernando County, Florida	\$750,000	NA	1. Provide water/sewer service to parcel  2. Develop industrial use on site no later than 2014

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development of a 50 acre business park. The scope of the project is to provide vital infrastructure to the subject property in order to support industrial use. Total project costs are currently estimated at \$750,000. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve enhancement of the Region’s industrial base, owing to the scale of development. The \$750,000 cost estimate covers a budget for road infrastructure and water/sewer utility provision to the site. Successful development of an industrial use could supply up to 300 new jobs to the Region.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
Site development at Hernando County SW Airport Industrial Park	\$3 million	NA	1. Provide water/sewer service to parcel 2. Develop industrial use onsite no later than 2012-13

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development within Hernando County’s 155 acre Airport Industrial Park. The scope of the project is to provide vital infrastructure to the subject property in order to support industrial use. Total project costs are currently estimated at \$3,000,000. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve enhancement of the Region’s industrial base, owing to the scale of development. The \$3,000,000 cost estimate covers a budget for road infrastructure and water/sewer utility provision to the site. Successful development of an industrial use could supply up to 1,000 new jobs to the Region.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Site Development at Cobb Road Area to be located in the City of Brooksville, Florida</b>	\$1 million	NA	<ol style="list-style-type: none"> <li>1. Provide sanitary sewer service to parcel</li> <li>2. Provide fire tower and water line onsite</li> <li>3. Develop industrial use on site no later than 2014</li> </ol>

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development within the City of Brooksville’s Cobb Road Industrial Park. The scope of the project is to provide vital infrastructure to the subject property in order to support industrial use. Total project costs are currently estimated at \$1,000,000. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve enhancement of the Region’s industrial base, owing to the scale of development. The \$1,000,000 cost estimate covers a budget for road infrastructure and water/sewer utility provision, as well as a fire tower for the site. Successful development of an industrial use could supply up to 300 new jobs to the Region.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Inverness Airport Business Park and Incubator</b>	\$5.75 million (total)	\$300,000	1. Approve business plan (2012) 2. Provision of access road stubs with phased addition of water and sewer infrastructure. (2013) 3. Complete Road, Water and Sewer infrastructure. (2014) 4. Incubator development and operation (2014) 5. Full incubator operation (2015)
	County/FAA \$2.9 Million		
	Private \$1 million		

**Tasks/Parties Responsible:**

The preliminary proposal calls for the development of the Inverness Airport Business Park to include a business incubator supported by public/private partnership. Project investment may be organized through a 501(c)6 with a goal of having the initial project funded by private parties, with assistance from University of Central Florida and the High Tech Corridor. The business park site is located adjacent to the Inverness Airport, which is just south of the City of Inverness off US 41. Access to the site will be by an extension of East Watson Road that is approximately 3 miles south of the interchange with SR 44 and US 41. Thus, the site will have four lane access to I-75.

Initial infrastructure needs to revolve around site development. The land is owned by Citrus County, and the County will oversee construction of improvements. Land development will require an access road to the property, extension of utilities, and initial construction of the 10,000 sq. ft. incubator. In addition to providing access, East Watson Street will also serve a traffic circulation role. Water and sewer lines will need to be extended onto the site.

EDA funding will be sought to develop the road and water/sewer improvements. Moreover, it must be determined what tech features will be needed by companies locating to the business park. Because the access road and improvements will serve both the airport and business park, the project therefore will be seeking FAA support as evidenced through the airport’s master plan. Consequently, the project costs borne by the business park development will be shared. Total infrastructure needs will be determined by the full development potential of the business park location, which may require improvements to support major business activity and investment leading to the creation of 500 jobs over the long-term.

The purpose of this project is to help Citrus County to create new jobs, by forwarding airport business park development, to ultimately become less reliant on residential growth in the local economy. The goals of creating a diverse economy have been identified in several studies undertaken by the Citrus County Economic Development Council and Citrus County. These studies have identified that current reliance on population growth and home building would not ensure an adequate tax base for the community. The study found that new, higher paying jobs in industry or technology related fields were



required. These conclusions, although specific to Citrus County, reinforce CEDS strategic findings and analysis for the Region as a whole.

The Airport Business Park Incubator project will advance economic development goals, while engaging the local to regional planning process. It should attract jobs that are part of a sustainable economy, graduating new companies to the community that would grow beyond the incubator to space in the business park. Likewise, this project will serve to highlight the possibilities of development at this location, using green technology and sustainability practice to create significant competitive and economic advantages.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>The Florida Agriculture Center and Horse Park Authority</b> (located on 500 acres in South Central Marion County between CR 475 and 475 A And CF Equine Studies Unit	\$24 million Private Contributions Public Funds (State and Federal)	\$1.2 million	Phased Horse Park Facilities: An indoor arena with seating capacity for 3000 persons, a campground, 8 show rings, 800 to 1,000 stalls. CF anticipates construction of two classrooms, a laboratory, and roundpen within 3 years

**Tasks/Parties Responsible:**

The Florida Horse Park is developing a state-of-the-art equestrian facility, which hosts premiere international events as well as local shows and clinics. The Florida Horse Park currently operates as a 501(c)3 organization on 500 acres of state owned land, in Marion County, within the Marjorie Harris Carr Cross Florida Greenway. The Florida Horse Park maintains a long-term lease with the Florida Department of Agriculture and Consumer Services. Because of its access to the Greenway, the Florida Horse Park is becoming one of the top trail riding destinations in the United States. Marion County has the highest concentration of farm equine in the United States, and a unique set of local to regional advantages offer the opportunity to develop a multi-purpose facility that few locations worldwide can equal.

Since June 2005, the Florida Horse Park has accelerated its construction and improvement activities. Currently, the facility boasts a state-of-the-art all-weather arena, a separate Grand Prix arena, an international marathon driving course, multiple cross country courses, a polo field and several warm-up arenas. Expected future improvements include an indoor arena with seating for approximately 3,000 persons, at least 8 show rings, a campground, and 800 to 1,000 permanent horse stalls. The total costs of future improvements could exceed \$20,000,000. Given the scope of anticipated improvements, facility additions will likely be phased. To date, the Florida Horse Park has created and sustains 246 jobs, yielding \$5,600,000 in wages annually. In total, the Florida Horse Park contributes a present day economic impact of \$15,100,000 to the Region’s economy. Complete development of the horse park as outlined above would see an increase to 1,228 jobs, annual wages would rise to \$28 million, and total economic benefits would grow to an impact of \$75 million. However, to reach its full potential, the Florida horse park will require major investments in infrastructure; estimates place these costs at approximately \$10,000,000.

Complementing the Florida Horse Park is College of Central Florida (CF) Equine Studies Program. Enrollment in the program has grown by multiples to 54 students in only 4 years, and it is anticipated to double again by the 2010 academic year. To accommodate the demands of strong growth, new facilities are needed, and CF views expansion to the Florida Horse Park as a logical next step. CF facilities to be located at the Florida Horse Park could include classrooms, a laboratory, offices, and a covered roundpen. Estimated construction costs equal about \$4,000,000 with associated annual



operating costs of \$200,000. In addition to meeting the demands of regional workforce development needs, CF improvements at the horse park site would create 6 above median income jobs.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Site development and provision of utilities for 300 +/- acres of industrial park facility in the NW Corner of Marion County</b>	\$11.52 Million	N/A	1. Install Utilities 2. Develop infrastructure 3. Develop for industrial use by 2014

**Tasks/Parties Responsible:**

This project proposes to facilitate industrial land development of 300+/- acres along the NW corner of SR 326 & CR 25A in Marion County. The scope of the project is to promote private acquisition of the land by providing the vital infrastructure and expedited land use/zoning/permitting necessary to attract manufacturing and/or distribution facilities. Total project costs of \$11,520,000 include provision of utilities and development of basic road infrastructure. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve enhancement of the Region’s industrial base. Successful development of industrial park sites could supply up to 1,200 new jobs to the Region. A great many of these jobs would be at or above 115 percent of the average median wage in Marion County, averaging between \$34,000 and \$40,000.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Institute for Human and Machine Cognition (IHMC) Ocala Facility Expansion Project</b>	estimated at approximately \$1200,000		13,500 square feet of additional lab and office space and building hardening

**Tasks/Parties Responsible:**

Culminating several years of planning and work, in 2010 the Florida Institute of Human & Machine Cognition (IHMC) officially opened the doors to its new research facility at the former city library in Ocala, Florida. In close partnership with the City of Ocala, County of Marion, Withlacoochee Regional Planning Council, State of Florida, and US Economic Development Administration, the team at IHMC worked to transition the historic library building into a research-ready laboratory facility. As part of this transition, it was necessary for the aging library building to undergo extensive renovations – envisioned initially as a multi-phase build-out due to the building’s size, two-floor structure, and available funding.

Phase I renovations, which account for the main floor (above ground) that is being utilized by the IHMC team today, currently serves as home to 15 scientists, researchers, and support staff from around the world. Like its sister facility in Pensacola, the Ocala IHMC site brings together top minds to conduct significant research, discovery, and innovation within realms such as natural language processing, cyber security, smart systems, robotics, artificial intelligence, and data mining for clients such as the DoD, NASA, DARPA, NSF, and the private sector.

By design, Phase I renovations purposefully provided for a spacious gathering/meeting area to accommodate events and activities beyond in-house research. Such events include holding evening lectures series (open to the public), Saturday Science programs for area youth, and hosting select conferences/meetings attended by science, military, government, and business leaders. Such scientific-based conferences have brought many new visitors to the Ocala-area from other states and nations whom have contributed to increased bed nights in area hotels, and patronage of local eateries.

As a general note, Phase I renovations earned IHMC Ocala the prized recognition of being a LEED Gold certified facility, certainly a showcase building for the Region to tout.

While yet to take place, Phase II renovations envisioned transformation of the 13,500 s.f. first floor of building (known by some as the lower level) to allow for additional laboratory space to accommodate new research teams involved in cyber security, smart systems, and natural language processing. Prior to build-out of additional lab and office space and new research hires, the Phase II renovations will require wall fortification, and protection from water intrusion.



While the project will need to go out for competitive bid to secure best price and product, the cost to fortify walls, protect against water intrusion, and build-out and equip additional smart research laboratories is estimated at approximately \$1200,000.

We are excited about the continued potential the IHMC Ocala location offers for research and discovery due to the facility's proximity to key research universities in Gainesville, Daytona Beach, Melbourne, Orlando, and Jacksonville, as well as to industry centers for space, military/defense, smart transportation systems, simulation/modeling, and robotics. The results of Phase II renovations will support IHMC in realizing that ongoing potential.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
(Owner/Developer)	Construction	Operations	Phasing
<p><b>Central Beef Industries Facility Expansion/</b></p> <p><b>5C Limited Partnership</b></p>	\$8,100,000	No Increase	<p>1. Phase One (13,898 SF- complete)</p> <p>2. Phase Two (13,707 SF - under construction)</p> <p>3. Phase Three Water Extension (complete)</p> <p>4. Wastewater Extension</p> <p>Provide water, sewer, and electrical service as needed and in conjunction with overall site development to facilitate location of future commercial users</p>

**Tasks/Parties Responsible:**

Central Beef Industries (CBI) occupies an approximately 122-acre site inside incorporated Center Hill, while an adjacent 40 acres are within unincorporated Sumter County. Central Beef Industries (CBI) is in the process of expanding its existing production area of 35,584 sq. ft. with an expansion of 31,652 sq. ft.. The City of Center Hill owns and operates a municipal water system and will provide the water supply for potable and fire suppression uses. Waste water service is a long term goal to facilitate future expansion and affiliated industry. The City of Bushnell owns and operates a municipal wastewater treatment plant and may provide wastewater management through a multi-jurisdictional utility agreement. The building expansion project will ensure existing jobs are retained and should produce up to 50 additional permanent full time jobs onsite when all improvements are complete, which should conclude by the end of 2012.

CBI has plans for future construction within the next ten years to complete the modernization of all existing facilities. Future expansion and redevelopment may include additional hide storage, expanded processing capabilities, and employees support facilities. The current and planned expansion will add new finish product lines and facilitate the processing of fed cattle.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Ocala-Marion County Commerce Park (a.k.a Magna Project) (Owner: Ocala 489 LLC)</b>			
<b>City Cost Share for Roadway and Utility Improvements:</b>  US 27-I-75 E NW 35th Avenue  NW 35th Avenue Segment C  NW 35th Avenue Segment B	\$9-11.4 million	NA	Phase One: Design 2011-2012  Phase Two: Permitting 2011-2012  Phase Three: Construction Start 2013 Construction End December 2020
<b>County Cost Share for Roadway Improvements:</b>  Extend NW 49 <sup>th</sup> St./NW 35 <sup>th</sup> St. Phase 2 from NW 44th Ave. to NW 27 <sup>th</sup> Ave.	\$13 million	NA	Design & Engineering: 2011 Construction: 2012-2013
<b>Developer Cost Share:</b>  Inland Port Facilities Rail Spur	\$2 -5 million	NA	Contingent on phasing of development schedule for Magna Site

**Tasks/Parties Responsible:**

This project involves the proposed development of property located at the north-east intersection of I-75 and US-27 which is privately owned (456.06 acres) plus other adjacent property by miscellaneous owners (188.35 acres) for the purpose of mixed-use development. The initial private sector investment is estimated at over \$38 million dollars (including land acquisition, site preparation, financing, marketing, and professional fees). Upon build-out the proposed development may include over 4,000,000 square feet of building space valued at over \$250,000,000.

The City has been working with Marion County and the state of Florida to develop a multi-year phasing plan for designing, permitting, and constructing required infrastructure to support the development. The City anticipates the improvement of US-27-I-75 to NW 35<sup>th</sup> Avenue, and the construction of NW 35<sup>th</sup>



Avenue Segments C and B, including stormwater, electric and water and sanitary sewer infrastructure. The City is pursuing funding assistance from other sources to supplement its own resources to fund construction. The cost estimate for these road segments is between \$9.0-\$11.4 million, contingent on final roadway design.

The purpose of this project is to create "shovel ready" sites to facilitate development including the attraction of a large distribution center ( $\pm$  1-2 million square feet under roof) among others which will lead to job creation. This is meant to address the current Marion County unemployment rate of 12.6% resulting in  $\pm$  17,000 out of work. The project will involve a multi-year build-out resulting in the creation of approximately 3,000 new jobs, wages in excess of the Marion County median income, and an annual payroll in excess of \$120,000,000. This is meant to address the fact that current projections indicate that  $\pm$  168,000 new residents will be moving into Marion County by 2035 resulting in the need for at least 63,000 new jobs and 4,500 acres of additional commercial-industrial zoned property.

Additional roadway improvements extending NW 49<sup>th</sup> Street, with a possible future interchange on I-75, would enhance site access and create increased mobility in the vicinity of the Magna subject location. NW 49<sup>th</sup> Street extension would almost certainly benefit access and mobility at the areawide scale, while reinforcing connectivity in the road network overall. Proposed road improvements would connect to other four lane divided roadways, create new opportunities for traffic circulation onsite or among uses, and help manage improved access to properties. NW 49<sup>th</sup> Street improvement helps obtain the highest and best use for the Magna site, which by definition will lead to direct job creation. This new segment of NW 49<sup>th</sup> Street is planned to measure 3000 feet. It is envisioned as a new four lane divided roadway with median, bike lanes, sidewalks, drainage facilities, and traffic signalization. Total costs are estimated \$13,000,000 for project for design, ROW, and construction.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>North Central Florida Regional Agriculture &amp; Civic Center:</b>		\$170,000	
Cover Arena	\$300,000		1. Covered Arena
Install 2 Barns with 100 stalls each	\$4.2 million		2. Design: December 2013
<b>Southeastern Livestock Pavilion:</b>			3. Permitting: September 2014
Paint Covered Arena	\$130,000		4. Construction: November 2015
Install Large Fans for Circulation	\$26,000		

**Tasks/Parties Responsible:**

Marion County depends in part on the tourism efforts associated with the equine industry. For equine enthusiasts Marion County is attractive because it has a concentration of associated industries to support equine efforts (showground's, feed and tack stores, equine vet facilities, farriers, etc.). The Southeastern Livestock Pavilion is one of the showground facilities available for use by equine audiences. A 2004 University of Florida study indicated the Livestock Pavilion generates \$ 11.2 million annually in economic activity. In addition to the aforementioned businesses, restaurants, food stores, fuel outlets and many other types of local small business benefit from activities associated with the Livestock Pavilion. Addition of these facilities will enhance the number, size and variety of shows that can be featured at the Southeastern Livestock Pavilion. The infusion of money into the local economy will result in creation of an indeterminate number of jobs in a variety of industries.

The project proposes to build a covered arena with two 100-stall barns at the North Central Florida Agriculture & Civic Center. This will allow the Center to create additional jobs to accommodate large-scale equine shows and to provide an additional facility for events. These improvements will provide substantial indirect job creation.

The North Central Florida Agriculture & Civic Center is located within the City of Ocala with close proximity to Interstate 75. A 25-acre parcel is on State of Florida Farmer's Market property and is leased to the Marion County Board of County Commissioners, who have managed the facility since 1998. Marion County owns an additional 25 acres surrounding the facility, accounting for 50 total acres. The site hosts the UF/IFAS Marion County Extension Service, offices for the Florida Department of Agriculture and the Southeastern Youth Fair.

The Southeastern Livestock arena, which opened at its present location about 1946, was roofed over in 1998. This expanded the use of the facility tremendously, because it is unaffected by weather. The paint



on the steel beams of the facility has begun to oxidize, resulting in deterioration. The paint project is intended to preserve the facility. Additionally, a second phase will result in the installation of large fans to circulate air in the covered arena.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>SW 44th Avenue Roadway Improvements</b>	Total cost : \$ 4,676,000		Design      Complete  Permitting      Incomplete  Construction      FY12 to FY 13  (Phased)

**Tasks/Parties Responsible:**

Description of Project: Phase III is the 4,800 ft. southern segment of SW 44th Avenue from SW 32nd Street south to SR 200. Specifically, the project will be a four-lane divided roadway with lane widths of 12 ft. and 100 ft. of right-of-way. It includes site work, surveying, curb & gutter, underground storm sewers, an extension of the city's potable water distribution system and sanitary sewer collection system, electric and signal work. Phase I of NW 44th Avenue, the 1.1 mile northern segment from U.S 27 to NW 8th Street was completed with grant funds from EDA in April, 2011. A portion of Phase II was constructed by a private developer, but remains unfinished. The second portion of Phase II remains undeveloped. The strategic importance of Phase III is its connection to SR 200, Flyover I-75 and the eventual completion of the outer belt.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Providence Boulevard Commercial/Light Industrial Development Area</b> <b>Owner:</b> City of Brooksville & various private property owners <b>Location:</b> From W. Jefferson Street (SR 50A) to Emerald Way running south and parallel with SR 50	\$2,053,289	N/A	1. Complete design, ROW acquisition, permitting & contractor selection process (12 months)  2. Construction of road related infrastructure improvements (10 months)

**Tasks/Parties Responsible:**

The project involves the construction of Providence Boulevard and related utility and stormwater infrastructure to facilitate commercial/light industrial development. The project is located on the west side of Brooksville and runs south from SR 50A to interconnect with Emerald Springs Way (which intersects with SR 50 approximately 600 feet to the southwest). The project includes the construction of approximately 3,700 linear feet of a two-lane collector road, sidewalks, water and sewer lines and stormwater facilities (approximately 916 LF of Providence Boulevard currently exists but is in need of realignment/reconstruction in part). The new street will run parallel with SR 50 and serve as a reverse frontage road, helping to preserve capacity on this critical state road corridor. A 768 LF extension (road, sidewalk, utilities and stormwater improvement) of Whitfield Avenue is also proposed in conjunction with this project.

The project will help to spur economic development and job creation by providing required infrastructure that will reduce the costs of developing privately owned land in this area. The project will provide infrastructure improvements that will serve 87± acres of vacant, undeveloped properties as well as 58± acres of existing developed or underdeveloped properties zoned for commercial, light industrial and mixed use. Approximately 87.74 acres of the total 145 ± acres that would benefit from the infrastructure proposed with this project are zoned for commercial/light industrial use, with the balance of 57.26 ± acres being designated for residential development.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Silver Springs Park and Redevelopment Area</b>	\$ 5,000,000		Phase 1: 2 <sup>nd</sup> Quarter 2013  Phase 2: 4 <sup>th</sup> Quarter 2015

**Tasks/Parties Responsible:**

The Silver Springs Park was once a tourism center that attracted hundreds of thousands of visitors to Ocala on a yearly basis. The 60 year old plus park is in an advance stage of growing blight and over the last two decades attendance has been reduced to only a fraction of the level experienced 50 years ago. The Silver Springs Park, home to one of the world’s largest magnitude natural springs is currently under State ownership but is leased to an international entertainment group that may or may not close the facility with little or no notice to the community. The Park and surrounding area along the State Road 40 Corridor is in great need of redevelopment. This commercial zone was originally developed during the 1940s through to the late 1960s and is itself in a current state of growing deterioration and blight.

Marion County Government has begun the process of delineating a proposed Community Redevelopment Area (CRA) that includes the 200 plus acre Silver Springs Park and the surrounding commercial and residential districts adjacent to this iconic landmark. A required “Findings of Necessity” has been completed in May 2012 and the process to begin public participation in the drafting of a “Redevelopment Plan” began shortly thereafter with a completion date scheduled for the 4<sup>th</sup> Quarter of 2012.

The creation of a CRA in the Silver Springs area will create an important economic development tool to be able to begin addressing the growing issue of blight and job creation. Resources generated by any success of the CRA can be used to leverage other municipal, state or federal resources to support the overall revitalization of this former natural landmark. Additional opportunities may arise as the Region begins a focus on eco-tourism. Silver Springs serves as the focal point for this focus as the county’s natural springs, rivers, forests and trails provide key resources to encourage outdoor adventures. Environmental tourism is part of a new growing consumer movement that focuses on travel to natural destinations, appreciation for natural ecosystems and life styles that build upon environmental awareness. Key to this initiative is the wealth of natural resources that exist throughout the county’s landscape. Encouraging and supporting eco-tourism as a viable small business opportunity allows the community to build an outdoor business infrastructure necessary to capture a small portion of the fastest growing sector of the tourism industry. Targeting goals of transforming county’s landscape for outdoor adventures will allow the community to package these assets into an active eco-tourism destination. Dedicating financial resources to create of a series of small eco-businesses can enhance the outdoor adventure experience and elevate the community’s image as an outdoor adventure destination.



Among the eco-tourism entrepreneurial opportunities that could be encouraged are kayaking and canoeing, scuba diving, guided underwater caving, small scale river house boating, upper canopy zip line adventures, and others. The nature of the larger landscape encourages natural science hiking adventures, camping, cycling, back country adventures and horseback riding. Packaging these outdoor adventures into multi-day experiences can add to the overnight lodging and serve as a stimulus for area restaurants, hospitality and entertainment venues.

Currently there are few jobs in the area, however, with the creation of a Community Redevelopment District, there is potential for renewed interest by many entrepreneurs. The concept of creating an outdoor destination strategy for the Silver Springs area will enhance the Region's ability to bring more visitors to the community to participate outdoor adventure venues and encourage entrepreneurial opportunities. Federal funding opportunities within the US Department of Commerce, US Forestry Service, USDA and the USEPA can be applied in various formats to support the commercial redevelopment, brownfields and intra/inter-connectivity of trails and waterways.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Marion County Extension Small Farm Initiative</b>  Create Cooperative to Produce Orchard Fruit	\$ 1,100,000  Phase One: Establish Grove Demonstration Site Form Cooperative, Enlist producers  Phase Two: Purchase Warehouse Retrofit packing equipment  Phase Three: Marketing/Brokering Year 1	Annual Operating Costs: \$ 42,000  \$ 40,000  \$ 15,000  \$ 850,000 \$ 150,000 \$ 10,000  \$ 35,000	April, 2013         September, 2013         September, 2015

**Tasks/Parties Responsible:**

Marion County features land along the upland ridge of central Florida. Soils are sandy loam and the county receives about 50 inches of rain annually, with a good supply of underground water. The warm summer temperatures and mild winters are a climate well suited to orchard fruit production. Marion County features large acreage tracts for the equine industry. However, small acreage also exists throughout the county, parcels of 10 – 20 acres. Individuals that obtain these properties are interested in agricultural production other than horses that could be profitable, while allowing the rural lifestyle.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Marion County Board of County Commissioners 484 Industrial Park Initiative</b>	Construction Total cost : \$7,000,000		Design & Permitting 2014  Construction Second Quarter 2016

**Tasks/Parties Responsible:**

Selecting a suitable future business park location within the 484 Redevelopment Corridor will provide the county with a “shovel ready” industrial site. Success will be based upon the willingness of current property owners within the corridor to enter into a future joint development agreement to allow a public investment partner to jointly benefit from current or future value of the site. Once a development agreement concept is in place, a preliminary site plan accommodating up to 300 acres will be drafted and included along with the terms and conditions of a final joint development agreement.

By jointly developing the site, the property owner is able to mitigate capital investment for preparing the site for development while the public investment is protected and rewarded. By planning and engineering the site to accommodate large tract users, the site will be readily available to accommodate future large scale employer needs. This initiative is capable of supporting approximately 2-million square feet of industrial space capable of generating a capital investment of \$200-million in future tax base. Further, successful build out of the site will generate employment opportunities for up to 3,000 workers.

In Addition to the 3,000 potential workers for the industrial park, this initiative proposes professionally planning and engineering a suitable business park site and the preparation of construction documents. Completion of an approved site plan, related permits and construction documents will position a large tract of industrial property for rapid development and job creation.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Marion County Board of County Commissioners Beverage Innovation Center Project</b>	Total cost : \$1,000,000	Operations: \$190,000	Design & Permitting First Quarter 2014  Construction Second Quarter 2014

**Tasks/Parties Responsible:**

The beverage innovation center is an idea that hatched from the Marion County “Doing More for JOBS” action plan in December of 2010. The idea is to provide a Center in which Beverage manufacturers can have access to a wide variety of assets to launch a beverage company on a small scale. The Marion County Beverage Innovation Center will involve both the public and private partners in Ocala, FL, and will serve as a job creation center focused on the development of new beverage lines. The County is in negotiations to have a facility and equipment needed to proceed with this initiative donated to the cause of job creation.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>The Power Plant</b> Ocala/Marion County Chamber of Commerce -Accelerate Ocala Incubator Expand existing facility to provide space for additional businesses	\$500,000 - \$1,000,000	\$200,000	Design and Permitting 2013-2014  Construction 2014- 2015

**Tasks/Parties Responsible:**

“The Power Plant” (also known as: Accelerate Ocala/Marion County, serves as a catalytic project for job creation by meeting the needs of emerging businesses through a mix of public and private partners. Accelerate Ocala/Marion County is a joint project of the Ocala/Marion County Chamber of Commerce, the City of Ocala, the Marion County Board of County Commissioners, the University of Florida and the University of Central Florida, as well as private supporters creating our community’s first business incubator. Accelerate Ocala/Marion County provides a setting for entrepreneurs to grow their businesses through wrap-around management services and training through networks of professionals and experts and through access to capital. The planning for the Accelerator is being led by two private sector champions along with 25 community and civic leaders.

The current site once served as the City’s Electric Generation plant (circa 1916). While once creating electricity, it is being repurposed to create jobs. The Accelerator is part of the master plan to redevelop Ocala’s historic downtown by increasing the number of businesses and residential dwellings. The two story 10,000 square foot facility currently accommodates 8 entrepreneurships. Additionally, “affiliate” level support will be provided for up to 50 entrepreneurs interested in management and professional support but not physical space. The Accelerate Planning Team is also considering establishing ‘soft landing’ space for emerging foreign firms interested in testing the US Market. The success of this community effort is the impetus for future onsite expansion of the existing facility, located in what is planned as Ocala’s technological campus.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>SE 92nd Loop Phases 1 &amp; 2 Roadway Improvements</b>	Construction Total cost : \$25,000,000	NA	Design & Permitting To be determined  Construction

**Tasks/Parties Responsible:**

Construct new four lane divided roadway with median, bike lanes, sidewalks, drainage facilities, and traffic signalization as SE 92<sup>nd</sup> Loop Phases 1 and 2. The project will extend from US 441 South of Belleview to SR 35 at SE 92<sup>nd</sup> Place Road for a total length of 5.2 miles. The funding amount needed is \$18,000,000 for project construction. The project will connect US 441 to SR 35 on the east side of Belleview and will provide an alternative to ease traffic congestion on US 441 thru Belleview. The design is complete and the County is in the process of acquiring the necessary right of way. This project will provide improved and adequate access to properties for development, presumably residential and commercial sites. The anticipated construction completion is 2017, pending funding availability.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>SW 95th Street - Phase 3B Roadway Improvements</b>	Total cost : \$25,000,000	NA	Design & Permitting To be determined  Construction

**Tasks/Parties Responsible:**

Construct new four lane divided roadway with median, bike lanes, sidewalks, drainage facilities, traffic signalization and an interchange at I-75 as SW 95<sup>th</sup> Street - Phase 3B. The project will extend from SW 49<sup>th</sup> Avenue to CR 475A. The County has completed the Interchange Justification Report and submitted it to FDOT and FHWA for review and approval. FDOT is undertaking the Preliminary Design and Environmental Study (PD&E) which should be completed by the end of 2014. The funding amount needed is \$25,000,000 for final design, ROW acquisition, and construction. The project will connect to other four lane divided roadways to the west of I-75 to provide improved and adequate access to properties for development, presumably residential and commercial sites. This is a long range project and is anticipated to be completed in early to mid 2020ies, pending funding availability.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Ford of Ocala Expansion Project</b> Bellevue FL	\$2.5 MM		Phase I: Design & Engineering Phase II: Construction Q1 2013 Phase III: Construction Ends QIV 2013

**Tasks/Parties Responsible:**

The project site is located at South 441/301, 7 miles north of the Villages, near Center State Bank location Lady Lake. A 19,000 s.f. dealership facility with 12-14 bays would be constructed to include a full-fledge sales and service operation. Capital investment totals roughly +\$2.5MM. Job creation would amount to 35-40 employees including management, technicians, sales, and administrative. Projected payroll is expected to cost of \$1.8 MM annually. A sewer connection will ultimately be required onsite. As a result of site development, Hwy 441 may require roadway improvements such as reconfiguration of the median. Site access will need to be coordinated with improvements within Hwy 441 right-of-way.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
College of Central Florida, additional campus in West Marion County	Land: \$5,000,000	\$2,000,000	Phase One: Land Acquisition (2013-14)
	Initial Site improvements: \$3,000,000		Phase Two: Site Preparation (2014-15)
			Phase Three: Construction of Initial Buildings (after 2016)

**Tasks/Parties Responsible:**

The 2006 Legislature included proviso language in the appropriations bill to authorize the College to acquire land and/or acquire or construct facilities for an additional campus in Marion County. Acquisition of a site will enable the college to move forward with the long range plan to relocate Criminal Justice, Commercial Driving, Equine studies and Health Occupations facilities. The president initiated a search for property which will serve College programs and preliminary options have been identified and are being evaluated.

Once a site of approximately 100 acres is selected, the College will follow the normal administrative procedures for securing site approval from the State Board of Education. Subsequent Facility Surveys are expected to include recommendations for construction of a branch center on the selected site.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
Site development for aviation industry at the Hernando County Airport in Hernando County, Florida	\$3,000,000	NA	1. Provide water/sewer service to area, development of drainage, aircraft ramp and taxiways
			2. The airport has numerous sites under consideration. The development of these sites is expected within 1-3 years, largely dependent upon the availability of funding

**Tasks/Parties Responsible:**

This project proposes to facilitate aviation industry development in various locations at the Hernando County Airport. The scope of the project is to provide vital infrastructure to the sites in order to support new user. Total project costs are currently estimated at \$3,000,000. Operating costs are not known at this time as an end user has not been identified. The project aims to achieve enhancement of the Region’s employment base, owing to the scale of development. The \$3,000,000 cost estimate is for road infrastructure, water/sewer service, aircraft ramp and taxiway. Successful development of these sites can supply up to 300 new jobs to the Region.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>COLLEGE OF CENTRAL FLORIDA International Center for Global Understanding</b>	\$5,000,000	\$400,000	Phase One: Identify site on Ocala campus (done)
			Phase Two: Raise private funds. (2012-15). Pending coordination with capital campaign for Appleton Museum operating endowment yet to be scheduled
			Phase Three: Construction (2015)

**Tasks/Parties Responsible:**

We are truly living in a global community. Our students and staff, whether in the classroom or the workplace, are immersed in a world of diverse cultures and value systems, traditional and non-traditional families, and friends and neighbors of many ethnic backgrounds. In response to this new global reality, the College of Central Florida established The Council on Diversity and Global Understanding in 2006 to give structure to the college’s ongoing initiatives which support a climate of inclusion and acceptance.

It is time to bring a physical presence to this important initiative. A venue for meaningful conversations about our uniqueness and similarities, led by faculty and students, will bring a global perspective to the educational experience. The opportunity to bring community leaders of diverse backgrounds to campus as role models for students will enhance both the lives of our students and the leaders themselves.

The CF Foundation, as a direct support organization of the college has made the commitment to partner with private donors to raise funds to support the construction of an International Center for Global Understanding on the Ocala campus. The Center would be located in center campus where student activity and traffic peak.

The proposed 10,000 square-foot center would include a conference room for receptions, small exhibitions and workshops. Two classrooms would provide lecture space for visiting scholars and faculty for instructional activities. Two residential suites, located on the second floor would provide accommodations for visiting scholars and international guests. The center’s support areas would include a small kitchen, student lounge, computer lab and administrative office.

An International Center for Global Understanding will bring the college and community’s focus in this vital area to a new and higher plain.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	Construction	Operations	Phasing
<b>Word Family, LLC</b>			
<b>Proposed Assisted Living Facility</b>	\$30,000,000 (ALF)	\$1.5 million (ALF payroll)	1. Phase One (+100 bed assisted living facility)
<b>Future office, residential and commercial</b>	TBA		2. Phase Two (future medical office, residential and commercial development)
<b>Water/Sewer Facilities</b>	\$2,000,000	TBA	3. Water and Wastewater Extension ( Provide water and sewer, service as needed and in conjunction with overall site development to facilitate location of future commercial users)
		NA	

**Tasks and Responsibilities**

The Word Family, LLC plans to develop a 156 acre site that it owns within the City of Wildwood. The site is located in the north east area of the City at the intersection of CR 466A and NE 157th Drive. An assisted living facility (ALF) organized in a campus setting will be the first development on the site. The cost to construct the ALF has not been finalized but is expected to exceed \$30 million. The ALF will create an initial 50 new jobs with an annual payroll of over \$1.5 million. Additional development planned for the site includes an ALF expansion, and other types of development including medical offices, residential and commercial. At build out the site is projected to be an employment center for up to 400 new jobs in the medical, service and commercial industries.

The City of Wildwood owns and operates a municipal water system that has enough capacity to serve the site with water for potable and fire suppression uses. The City also owns a wastewater facility that could serve the site if a sewer line extension of approximately two miles was extended from the City's wastewater treatment plant located in the southwest area of the City to the proposed development site. The proposed ALF will require water and sewer services to begin operations. The needed infrastructure could be funded with state and federal grants.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
Port Citrus - Citrus County	\$700,000 to 1 million		start of project in 2013
			completion beginning 2015

**Tasks/Parties Responsible:**

\* Development of Port Citrus would bring the opportunity for job creation, increased tax base, and the extension of infrastructure with little to no environmental or social impacts. The port could potentially bring a variety of jobs including management, business development, terminal operations, security, finance/contracts, maintenance, and operations to name a few. The development of port facilities and operations will diversify the tax base and increase the tax revenue for the county.

\* Access for the port will be from US-19 a 4-lane principal arterial highway also designated as a part of the FDOT's Strategic Intermodal System (SIS).

\* Development of the port will require the extension of potable water and sanitary sewer service to the north-west area of the county. The extension of sanitary sewer along US-19 to the port will provide the ability to remove septic tanks which currently leach into the Floridian Aquifer, the source of our drinking water. In addition, the Town of Inglis could connect to water and sewer infrastructure if available.

\* The Barge Canal accessing the Gulf of Mexico and the key cut at the general port area are already in place, and therefore environmental impacts would be negligible. The Barge Canal boat ramp provides boat access to the Gulf of Mexico for sports fishermen. A trail head and paved walking trail exist along the south banks of the canal.

The use of grant funds would provide temporary employment of approximately 250 people, and long term employment of 125.



ACTION PLAN			
Project <i>(Owner/Developer)</i>	Estimated Cost/Funding		Project Timetable
	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Citrus County Medical Corridor</b>			

**Tasks/Parties Responsible:**

\* The Board of County Commissioners has long hailed the development of a medical corridor along CR-491, Lecanto Highway, as the perfect location to provide a focused healthcare and wellness district. Development of a medical corridor will incorporate an expanded offering of medical services in conjunction with renewed infrastructure, roadway enhancements, improved pedestrian amenities and environmentally friendly landscaping methods.

\* The CR-491 corridor is scheduled to be widened to a 4-lane urban roadway by 2015 which will provide adequate road capacity and sidewalks providing pedestrian accessibility to and from medical providers.

\* Potable water and sanitary sewer lines are available within the existing road right-of-way and will be upgraded as part of the road improvement project.

\* Medical corridor could involve the adaptive reuse of existing structures and properties while also attracting new, innovative development practices that preserve our community's unique character.

\* The medical corridor will bring a wide variety of jobs including surgeons, physicians, nursing, laboratory science, medical imaging medicine, pharmacy, physician assisting, podiatry, psychology, therapy and rehabilitation to name a few.

Temporary employment would be approximately 150 jobs and long term employment is estimated at 125 jobs.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
Owner/Developer	Construction	Operations	Phasing
<b>Sumter County Center for Workforce Innovation &amp; Education</b> Lake-Sumter Community College (Lake-Sumter State College as of 11-1-12)	\$4.1 M (includes planning, construction & equipment)	\$187,000	Fast-track such as design-build Land provided by college

**Tasks/Parties Responsible:**

In proposing this project, called the Sumter County Workforce Innovation and Education Center, Lake-Sumter Community College intends to significantly expand its educational presence in Sumter County and to do that in a non-traditional manner – by teaming the college with all the major Sumter County stakeholders and our university partners. The proposed Center is designed to achieve three main purposes: 1) to permit Sumter County high school students and graduates to “learn and earn” without leaving the County to acquire employable skills and decent high tech jobs, 2) to provide those already employed in Sumter County with needed upgrades in education, certifications and/or re-certifications, also without leaving the county, and 3) to promote and enhance the cause of county-wide economic development to attract new jobs and expand opportunities for growth.

For the last several months, the college has been conducting a needs assessment focused on the principal public sector entities and the Villages Charter School. Interviews have been conducted with the Sumter County Manager, Sheriff, Superintendent of Public Instruction, the Director of Education of the Villages Charter School, the Dean of the USF College of Medicine studying health care needs in the Villages, and UCF Provost regarding joint programs with LSCC. Among the possible programs that could be included in the first stages of this proposed center are health and health related certificates and degrees, the new college B.A.S. degree in Organizational Management for public safety officials, county supervisors and business managers, selected trade certificate programs to support the commercial and residential market, an agri-tech specialized certificate, police and fire science training, and a certificate program in electronic records designed to complement the Villages health plans now undertaken by USF’s College of Medicine.

The facility will include six (6) vocational labs, three (3) classrooms and one (1) multi-purpose room with all of the amenities (offices, restrooms, conference room, custodial, etc.). The college estimates the total cost of building and equipping this 18,000 square foot project at more than five million dollars; however, it also believes that the partners in Sumter County have the capacity and willingness to provide significant assets and resources, including land, facilities and equipment to reduce that number. To that end, meetings of the partners will continue in order to plan the next steps and determine how that might be best accomplished. At the same time, the college will be working with the Florida College System Office to ensure their support of the project.



ACTION PLAN			
Project	Estimated Cost/Funding		Project Timetable
<i>(Owner/Developer)</i>	<i>Construction</i>	<i>Operations</i>	<i>Phasing</i>
<b>Hernando County Broadband Network Project</b>	Estimated project cost: \$4,000,000		

**Tasks/Parties Responsible:**

Hernando County Government is interested in facilitating a true county-wide network that will make it possible for residents, businesses and government to take advantage of existing and new broadband technologies.

Hernando County is a community north of Tampa Bay with a population of 173,000. The County is 473 square miles and is diverse in development. The County has two cities, Weeki Wachee and Brooksville. Approximately 30% of the County land area is in local, state or federal conservation areas.

Approximately 50% of the land area of the County is un-served or underserved in terms of high speed broadband service. By providing new or alternate service broadband options to these areas, economic opportunities will dramatically increase. The following are the primary objectives of the project:

- To create and sustain a public/private business model to install and maintain a viable wireless broadband network.
- To provide seamless and reliable broadband access to the Internet for residents and businesses throughout Hernando County. Such availability will serve as either a service alternative to existing providers or the sole option for those who are currently un-served.
- To support economic development, particularly the recruitment and retention of businesses that rely on broadband connectivity.
- To introduce and/or consolidate broadband technology to Hernando County government operations in order to increase productivity, efficiency and enhance the quality of service delivery.
- To support and enhance public safety operations.

The adjoining counties of Citrus and Pasco have expressed interest in this project. Accordingly it is desirable for the system to be designed for expansion into these areas.