

Comprehensive Economic Development Strategy

Southwest Florida Regional Planning Council
Economic Development District Since 1992



Charlotte, Collier, Glades,
Hendry, Lee, & Sarasota

2017
2022

5 Year Regional Plan

Southwest Florida Comprehensive Economic Development Strategy

2017-2022

September 2017

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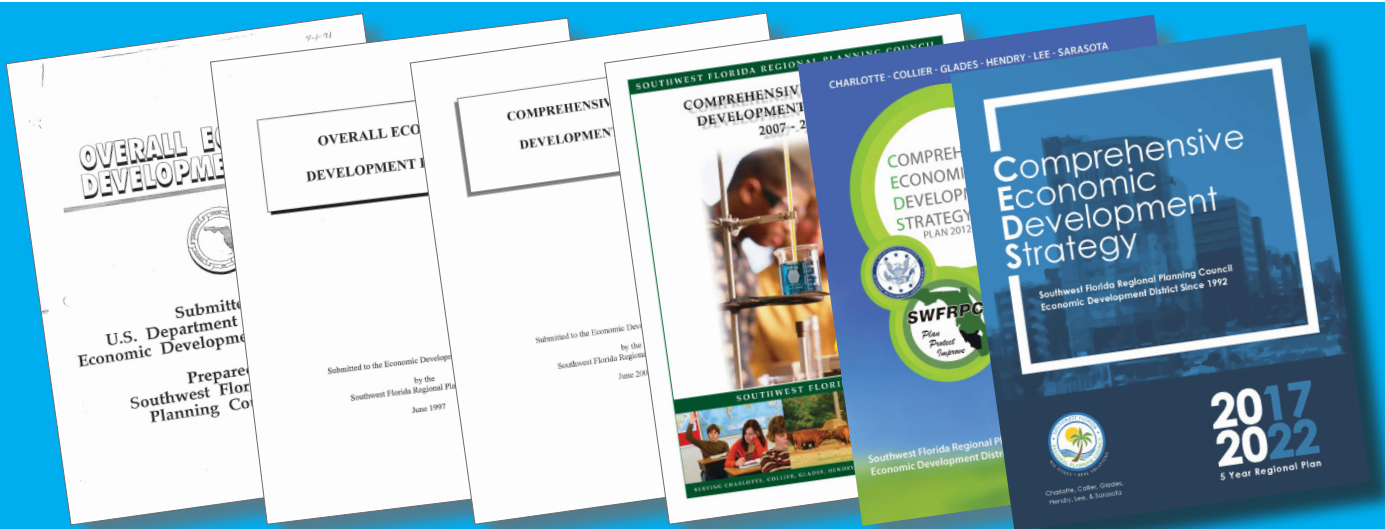
Executive Summary

The Southwest Florida Regional Planning Council has served as the Southwest Florida Economic Development District since 1992, when the Council received its district designation from the U.S. Economic Development Administration. Counties that are members of the Council and the municipalities located within those counties are included in the Southwest Florida Economic Development District, and are designated by the U.S. Economic Development Administration as redevelopment areas and are eligible for financial assistance from the U.S. Economic Development Administration.

The primary function of the Southwest Florida Economic Development District is to create and update the Comprehensive Economic Development Strategy for the region. The Comprehensive Economic Development Strategy provides the framework by which economic development projects in the region qualify for grant funding from the U.S. Economic Development Administration. The Strategy is developed by the Strategy Committee which is comprised of a broad range of regional economic development, business, civic, education and workforce development professionals.

The following report, the 6th Edition of the region's vision for economic development, provides a description of current economic and demographic conditions of the region, an analysis of regional strengths and weaknesses and an analysis of regional industry clusters. The report also lists the economic development goals and objectives as well as the Priority Projects developed by the CEDS Committee. The report includes a plan of action that outlines the activities necessary to implement the goals and objectives of the Strategy.

The Strategy uses the Florida Chamber Foundation's Six Pillars of Florida's Future Economy as the organizing framework. The Six Pillars are: Talent Supply & Education; Innovation & Economic Development; Infrastructure & Growth Leadership; Business Climate & Competitiveness; Civic & Governance Systems; and Quality of Life & Quality Places.



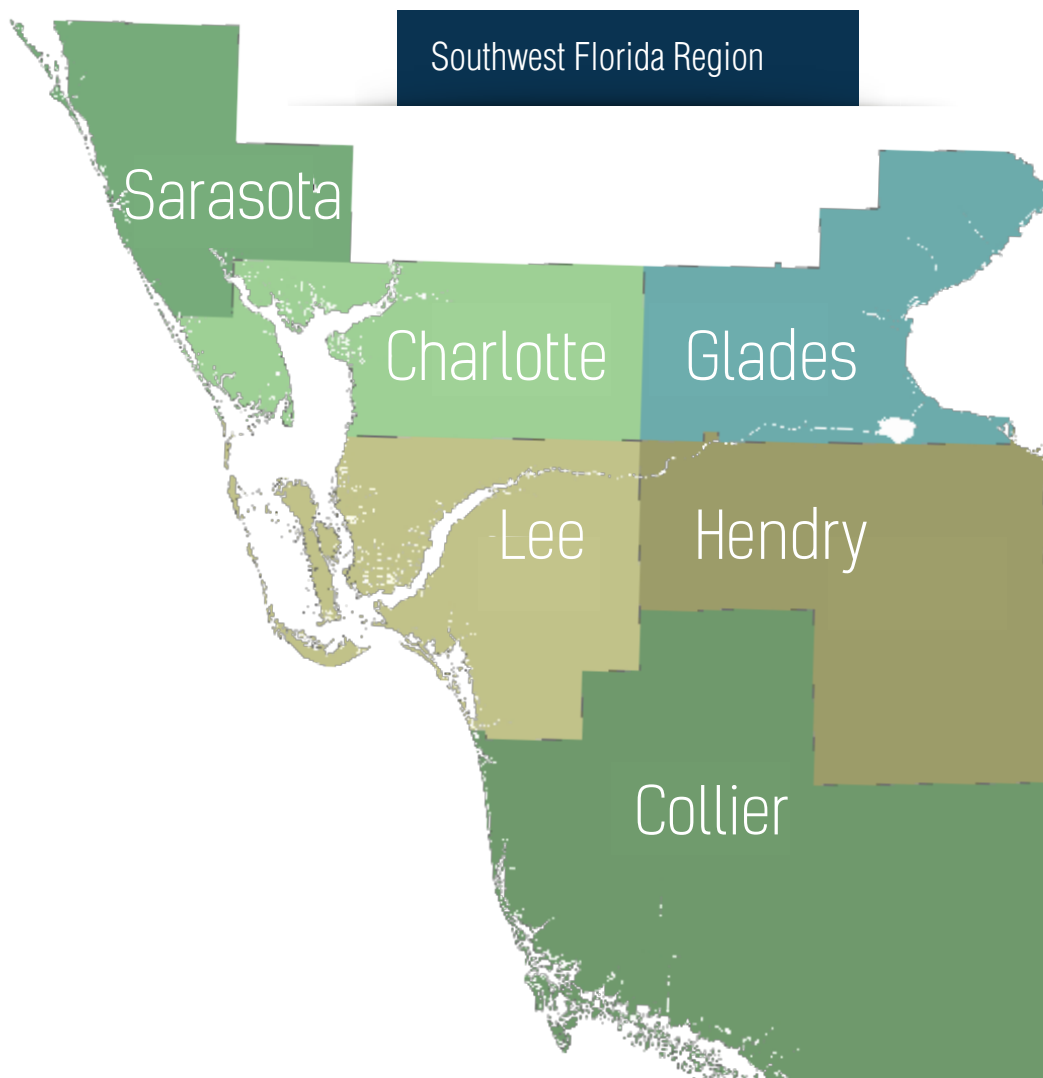
A. Background

Since its designation as an Economic Development District (EDD) in 1992, the Southwest Florida Regional Planning Council has worked to promote economic development in the six-county region (Charlotte, Collier, Glades, Hendry, Lee and Sarasota). The Council has accomplished this by working closely with the cities and counties in the region and by implementing its work program that is submitted annually in the funding application to the EDA.

To further the effectiveness of the EDD, the CEDS Working Committee was established, comprising of economic development professionals and stakeholders from throughout the region. The mission of the Committee is to share information and to address problems concerning economic development whenever possible from a regional perspective. These efforts will continue and are expected to increase based on the range of projects identified in this Comprehensive Economic Development Strategy (CEDS).

The Council staff maintains the SWFRPC website and project portal where most of this information is available. For more information visit: www.swfrpc.org. The Council and its Committees will continue to facilitate and update website content related to economic development.

In addition, Council staff responds to a variety of individual requests for information from communities, businesses, individuals, public and community organizations. Council staff has continued to work closely with local economic development organizations (public and private) to assist in the implementation of their programs and projects. Staff alerts local communities and economic development organizations of available programs that will assist in meeting their economic goals.



CEDS Purpose and Process

The purpose of the CEDS is to bring together the public and private sectors for the creation of an economic roadmap that will diversify and strengthen regional economies. The CEDS analyzes the regional economy and serves as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources. The CEDS integrates the region's human and physical capital planning in the service of economic development. An integrated economic development planning process provides the flexibility to adapt to global economic conditions and fully utilize the region's unique advantages while maximizing economic opportunities for its residents. This is achieved by attracting the private investment that creates jobs for the region's residents. Finally, the CEDS provides a useful benchmark by which the regional economy can evaluate opportunities with other regions in the national economy.

The process of creating the CEDS requires a continuing economic development planning process developed with a broad-based and diverse public-private sector participation effort and coupled with a set of goals and objectives that solves the economic development problems of the region and that clearly define the metrics of success.

EDA regulations require that the existing CEDS be updated annually and that a new CEDS be developed at least once every five years, or whenever substantial changes in the regional economy render the existing document obsolete.

CEDS Public Workshops 2017

A critical goal of the comprehensive public engagement process implemented for the development of the CEDS is to position our region for positive change. In 2017, the Florida Chamber Foundation held two town hall meetings in Southwest Florida as a part of their Florida 2030 initiative. This meetings gathered about 70 economic development professionals and stakeholders from around the region to discuss the strengths and weaknesses of the region, as well as the region's plans for the future.

Table 1: Outreach Meetings		
Charlotte	Collier	Glades
Charlotte County BOCC Meeting	Collier County BOCC Meeting	Glades County BOCC Meeting
Charlotte County Chamber of Commerce	Greater Naples Chamber of Commerce	Promise Zone Economic Development Task Force Meeting
Punta Gorda Chamber of Commerce		
Punta Gorda City Manager		
Hendry	Lee	Sarasota
Hendry County BOCC Meeting	Bonita Springs Area Chamber of Commerce	Longboat Key-Town Council Meeting
Hendry Asset Mapping	Fort Myers NRN	Venice-City Council Meeting
Hendry County Manager	Bonita Springs Mayor	Sarasota-City Council Meeting
	Cape Coral City Manager	North Port-City Council Meeting
	Bonita Springs City Council	Greater Sarasota Chamber of Commerce
		North Port City Manager
		North Port Economic Development Office

Table 2: CEDS Development Schedule 2017	
April 28th	<ul style="list-style-type: none"> • Draft Plan • Review Vital Projects List • Feedback/Comments from CEDS Working Committee
July 28th	Adoption by the CEDS Working Committee
August	30 Day Public Review Period
September 21	Final Adoption by the Southwest Florida Regional Planning Council

Community and Private Sector Partners

Community and Private Sector Involvement

The Council was designated an Economic Development District (EDD) by the Economic Development Administration (EDA) in 1992. The Council has an Economic Development CEDS Working Committee that meets to share information on programs and projects. With representatives from each of the six counties in the region, the Committee discusses problems or issues of importance to the entire region. Members also share information regarding programs they have developed or utilized to resolve local issues. As a result, the Committee serves as a network allowing members of the various economic development organizations to meet and discuss situations that are similar throughout the region.

Community and the private sector input were critical to the successful development of the Southwest Florida CEDS. Throughout the development of the 2017 CEDS, staff and the CEDS Working Committee have gathered input and advice from community groups and private sector representatives throughout the six-county region.

The CEDS was made available to the public for thirty (30) days to review and comment. Input from this public comment period was taken into consideration prior to the completion of the plan.

Regional economic development planning efforts and technical assistance are handled primarily through the Council. The Council and the many economic development organizations work closely with the regional universities and colleges. Florida Gulf Coast University, Hodges University and Florida SouthWestern State College are important participants in the overall regional economic development process and provided expertise and studies. In addition, the regional economic development organizations are currently working with the universities and colleges to develop key training and degree programs to meet the future regional employment needs.

Provided below are snapshots of the region's economic development organizations:

Charlotte County Economic Development

In 2001, the Charlotte County Board of County Commissioners established the Economic Development Office (EDO) to focus on the recruitment of high impact industry to Charlotte County facilitating the creation of high skill, high wage jobs, and to help diversify the economy and tax base. Over the years, the EDO has broadened its mission to include Business Expansion and Retention as well as building an Entrepreneurial Support network to

nurture innovation and startups. The EDO staff provides support to the Economic Development Partnership; the Enterprise Charlotte Foundation; and the Charlotte County Industrial Development Authority. The Economic Development Partnership, a 501 (c) (6) organization was established in 2008 to provide a funding vehicle for businesses to invest in the long-term economic vitality of Charlotte County. The focus of the Economic Development Partnership is to expand economic development opportunities locally and to develop partnerships at the regional, state and national level that will encourage business growth.

For more information visit: <http://www.Cleared4Takeoff.com>

Collier County

Collier Business and Economic Development office is a source for Collier County to provide opportunities for unparalleled growth to new and expanding businesses.

For more information, please visit: <http://www.colliergov.net>

Greater Naples Chamber of Commerce

Presently the Greater Naples Chamber of Commerce has assumed responsibility and manages program development and growth associated with various opportunities related to relocating/starting a business and growing your business.

For more information, please visit: <http://napleschamber.org/>

Glades County Economic Development Council

The Glades County Economic Development Council (EDC), Inc. was established in 1999, and is a public private-partnership receiving funding from Glades County, the City of Moore Haven and members. The mission of the Glades County EDC is to promote new commercial and industrial development while protecting the quality of life residents enjoy.

For more information visit: <http://www.gladescountyedc.com/>

Hendry County Economic Development Council

Hendry County Economic Development Council (HCEDC), incorporated in 1997, actively works to improve the economic stability and tax base of Hendry County, enhancing economic opportunities, personal income, and the quality of life of the citizens of Hendry County. HCEDC coordinates business development activities, including the creation and/or attraction of new businesses, development and expansion of minority businesses, and the encouragement of existing businesses to remain and

expand within Hendry County.

For more information visit: <http://hendryedc.com/>

Lee County Economic Development Office

The Lee County's Economic Development Office (EDO) was created to bring new companies to the area and help existing businesses grow and expand. The EDO staff also provides support to Lee County's Horizon Council, Horizon Foundation and Industrial Development Authority.

Lee County has an umbrella economic development organization called the Horizon Council. The Horizon Council consists of representatives from area businesses and local governments and is staffed by the Lee County EDO, a county agency. The Horizon Council serves as an advisory board to the Lee County Board of County Commissioners.

For more information visit: <http://www.leecountybusiness.com>

Cape Coral Economic Development

Another group that is active in Lee County is the City of Cape Coral's Economic Development Office. The staff of this office works with potential new businesses to the city and provides technical assistance as needed to new and existing businesses.

For more information visit: <http://www.capecoral.net/enus/business.aspx>

Fort Myers Economic Development Office

The Fort Myers Economic Development Office is responsible for coordinating and implementing economic development activities with the Fort Myers Regional Partnership for Economic Development and regional partners. The City recognizes its role in the regional economy of Southwest Florida as a leading urban core as a transportation, education, health care, and industrial center. Economic development and redevelopment programs offered enrich the regional economy and diverse cultural opportunities present to provide a sustainable and prosperous environment to live, work, and play in the City of Fort Myers.

For more information visit: <http://www.cityftmyers.com/>

Economic Development Corporation Sarasota County

The Economic Development Corporation of Sarasota County is the professional economic development entity for Sarasota County. It is a non-profit, public/private partnership that assists existing companies with expansions, attracts and retains quality jobs, solicits new businesses compatible with the assets and values of

Sarasota County, promotes Sarasota County's business image, and enhances Sarasota County's overall quality of life.

For more information visit: <http://www.edcsarasotacounty.com/>

North Port Economic Development Division

The City of North Port Economic Development Division (Division) is responsible for the implementation of the City's economic development strategic plan, its marketing strategy and business attraction, retention and expansion activities. The Division also works closely with local and regional partners to promote the economic development goals and strategies of the Southwest Florida Region and its unique communities. As the largest city in Sarasota County, North Port recognizes its role as an important leader in promoting regional cooperation and collaboration even as it continues to develop new business and development opportunities within its boundaries. North Port's economic development efforts have been recognized locally and statewide because of strong support from its engaged citizenry and its elected leaders.

For more information visit: <http://cityofnorthport.com>

Southwest Florida Economic Development Alliance

The Southwest Florida Economic Development Alliance helps companies expand and grow in Southwest Florida, assisting with site location, incentives, talent attraction, process navigation, and regional data. Led by private industry, the Alliance understands what it takes to have a company be successful. The vision of the Alliance is that Southwest Florida is perceived nationally and internationally as an excellent place to do business, along with being a premier vacation and retirement location, resulting in businesses investing in the region and thereby diversifying and growing the economy. The mission of the Alliance is to be a marketing engine representing the five-county region comprising Southwest Florida to attract businesses to the region. The Alliance serves as a non-parochial economic development coordinator to site selectors, real estate consultants and targeted companies, working in collaboration with the local economic development organizations.

For more information visit: <https://swfleda.com/>

Southwest Florida Workforce Development Board

The Southwest Florida Workforce Development Board, Inc., is a public/private non-profit organization that administers and coordinates workforce related programs for the state. It operates career and service centers throughout the region, providing a single point of contact for employers and workers to connect.

For more information visit: <http://www.swflworks.org/>

FHERO (Florida Heartland Economic Region of Opportunity)

Glades, Hendry and Immokalee participate in the Florida Heartland Economic Region of Opportunity (FHERO) and the Rural Area of Critical Economic Concern. FHERO provides economic development coordination to businesses interested in expanding or relocating to inland, South Central Florida. Working with local partners within the region, as well as Enterprise Florida, Inc., Workforce Florida, Inc. and the Governor's Office of Tourism, Trade and Economic Development, FHERO will provide your company with site selection, incentives and workforce training assistance.

For more information visit: <http://www.flaheartland.com/>

Lee County Port Authority

The Lee County Port Authority operates Southwest Florida International Airport (RSW) and Page Field (FMY) in Fort Myers, Florida. Southwest Florida International Airport served more than 8.6 million passengers in 2016 and is one of the top 50 U.S. airports for passenger traffic. Page Field provides services to corporate, commercial and private aviators and accommodated more than 108,000 aircraft operations in 2016. No ad valorem (property) taxes are used for airport operation or construction and both airports are funded solely with revenue generated from their operations.

For more information, please visit: www.flylcpa.com

Seminole Tribe of Florida

The Seminole Tribe of Florida is a federally recognized Indian tribe organized pursuant to Section 16 of the Indian Reorganization Act of 1934, as amended.

In 1957, the Department of the Interior approved the Tribe's Constitution and Bylaws, and on August 21, 1957, a majority of tribal members voted to establish the Seminole Tribe of Florida. A Tribal Council and Board of Directors were established with elected representation from each reservation community.

Tribal enrollment is about 3,800. Most tribal members live on or near one of the five reservations and tribal land. Headquarters is located on the Hollywood Reservation. The other reservations are Big Cypress, the largest reservation in area; Brighton, located on the northwest side of Lake Okeechobee; Immokalee, located east of Ft. Myers; and the Tampa Reservation. Other tribal members live on the Fort Pierce tribal land.

The ancestors of the Seminoles have lived in the land now known as Florida for countless generations. In the 1800s, the Seminoles fought three wars against the United States in order to stay in their homeland. Some were killed and thousands were captured and shipped to Indian Territory. However, a few hundred courageous men, women and children never gave up, and the Seminoles were never defeated.

To this day, the people are known as The Unconquered Seminoles. For more information visit: <http://www.semtribe.com/>

Other Local Organizations

Along with the local organizations mentioned above, there are also a number of smaller efforts that are directed to very specific areas. They include the Chambers of Commerce, the Development Authorities, the Community Redevelopment Agencies, the Enterprise Zones and the Foreign Trade Zones.

The Florida Department of Transportation's Fort Myers Urban Office (also known as the Southwest Area Office)

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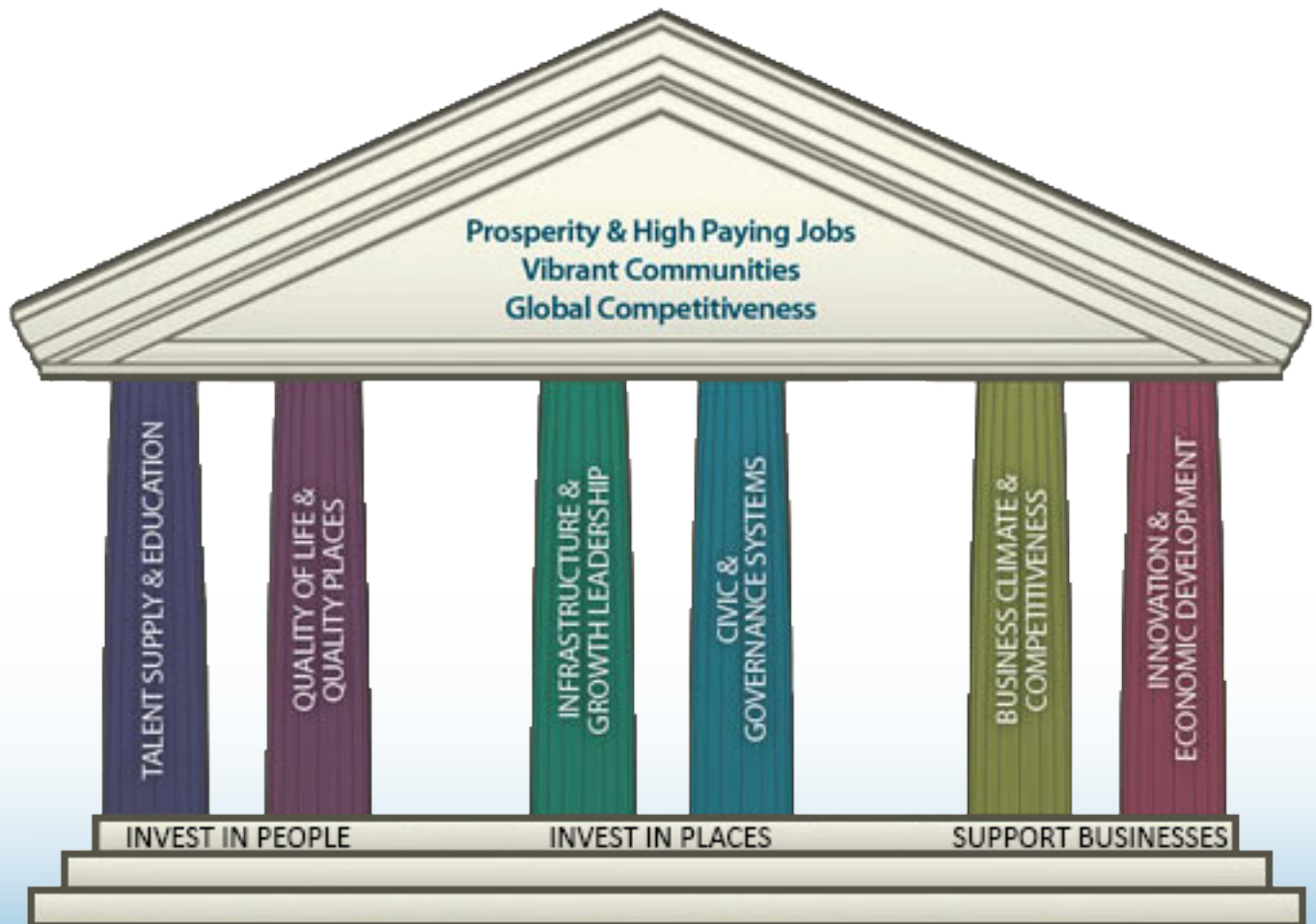
Established by Florida Statute 20.23 in 1986, the Florida Department of Transportation's Fort Myers Urban Office (SWAO) serves as the department's local point of contact for the southern counties of District One. It is responsible for providing policy, direction, local government coordination, and planning for six counties, five of which are part of the Council. In addition to the office's director, who is responsible for annual development of the five year work program for the six counties, staff includes experts in transportation planning, design, right-of-way, traffic operations, access management, and public transportation. Program management staff in SWAO initiates and administers development of joint participation and local funding agreements between the department and local governments throughout the district. Public information staff serves as liaisons with community members and as spokespersons with media. Through its long-standing relationship with local jurisdictions, SWAO sharply focuses a shared vision on multi-modal infrastructure as an economic engine geared to drive Florida competitively through the 21st century. With firsthand understanding about the region's needs, SWAO works closely with local governments and the public to establish transportation priorities, identifies federal and state funding opportunities, and assists in development of projects integral to southwest Florida's-and the state's-mobility and economic well being.

Six Pillars

The Florida Chamber Foundation created the Six Pillars Framework, an organizational framework that identifies key factors that drive Florida's future economy and helps communities, agencies and organizations speak with one voice. The Six Pillars Framework creates a united strategy that would focus on creating prosperity and high paying jobs, ensuring Florida remained globally competitive and fostering vibrant and sustainable communities. The Southwest Florida Economic Development District grouped the Pillars into three categories: Invest in People, Invest in Places, and Support Businesses.

Illustration 1: Six Pillars of Florida's Future Economy

SIX PILLARS OF FLORIDA'S FUTURE ECONOMY



CEDS Working Committee

The CEDS Working Committee met frequently during the development process of the 2012 CEDS and will continue to meet quarterly to monitor the progress of on-going projects identified in the plan. The CEDS Working Committee meets to discuss the region's economic situation, to evaluate and endorse appropriate economic development projects, to advise participating municipalities and organizations of funding opportunities and programs, and to bring matters of regional importance to the attention of the Council government officials.

Committee Structure

In compliance with United States Department of Commerce, Economic Development Administration guidelines, the CEDS Working Committee is responsible for developing, revising or replacing the CEDS. The Committee is comprised of representatives from the main economic interests in the region, including the private sector. See Table 6 below for a list of members.

First Name	Last Name	Alternate	Company	Public	Private
Lucilla	Ayer		Collier Metropolitan Organization	X	X
Kristi	Bartlett		The Greater Naples Chamber	X	X
Eric	Berglund		SWFEDA	X	X
John	Boland	Warren Baucom	Lee County EDO	X	
Dana	Brunett		City of Cape Coral EDO	X	
Ruth	Buchanan		City of North Port	X	
Laura	DeJohn		Johnson Engineering, Inc		X
Rita	Effing	Greg Blurton	Lee County Public Schools	X	
Tiffany	Esposito		Bonita Springs Chamber of Commerce	X	X
Doug	Gyure		S4J Manufacturing Services, Inc.		X
Bob	Herrington		Charlotte County-Punta Gorda Metropolitan Planning Organization	X	X
Mark	Huey	Joan McGill	Economic Development Corp of Sarasota County	X	
Matt	Johnson		City of Fort Myers	X	
Jace	Kenter		Collier County EDO	X	
Brent	Kettler		Hendry County EDC	X	
Lois	Knox		FGCU Sm. Bus. Dev. Center	X	
Ellen	Lindblad		Lee County Port Authority, SWFL International Airport	X	X
Jeff	Maultsby		Sarasota County - Office of Business and Economic Development	X	
Lucienne	Pears	Kay Tracy	Charlotte County EDO	X	
Gina	Reynolds		FHERO	X	X
Pat	Riley		Alliance of Educational Leaders	X	X
Brian	Rist		The Smart Companies, Inc.		X
Don	Scott		Lee County MPO	X	X
Beth	Sterchi		Prestige Printing		X
Jim	Wall		South Florida Workforce Development Board	X	
Christopher	Westley		FGCU - Mod II-13	X	
Tracy	Whirls		Glades County EDC	X	

Planning Organization History and Management

The SWFRPC was created by an Interlocal Agreement dated November 8, 1973, amended October 28, 1980, between Charlotte, Collier, Glades, Hendry, Lee and Sarasota Counties, and by Chapter 186.505, Florida Statutes. In accordance with Florida Statutes, the agency is directed by a Council (currently 37 members) composed of 26 county commissioners and municipal elected officials, 7 gubernatorial appointees from all counties within the region including an elected school board member, and 4 ex-officio (non-voting) gubernatorial appointees representing the Florida Department of Transportation, the Florida Department of Environmental Protection, and water management districts.

The Council is designated Regional District 9 and serves as a regional information clearinghouse. The Council works within the six-county region to develop and maintain area-wide goals, strategies, and actions, and assists in implementing a variety of local, state and federal programs. The Council serves as an advocate for the region with State and Federal agencies, including the Legislature and Congress. In addition, the Council works with its members and partners to develop and maintain region-wide goals, objectives and policies and assists in implementing local, state and federal programs.

In 2012, the Council identified economic development as a top priority, along with grant work, data/demographics, regional planning and emergency management programs. The Council established a Strategy Committee specifically to work on economic development issues and to provide oversight to the CEDS Working Committee, charged with producing a CEDS.

Economy

The economy in Southwest Florida has recovered from the collapse of the housing bubble and financial crisis. Population growth has been significant and Southwest Florida is one of the fastest growing regions in one of the fastest growing states in the nation.

The state's economic growth has outperformed the national economy every year since 2013 and the strong economic growth of Southwest Florida's cities are fueling Florida's bright economic outlook. In fact, Forbes magazine listed Cape Coral-Fort Myers as the number 1 fastest growing cities of 2017; North Port-Sarasota-Bradenton was listed number 6.

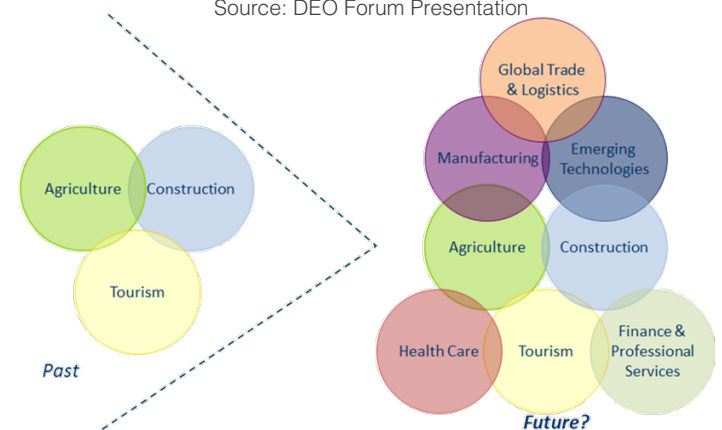
Historically, Southwest Florida's economy has been heavily dependent on tourism, construction, and agriculture. The area's competitive advantages include its weather, beaches, natural resources, recreational opportunities, favorable business climate and relatively low cost of living. This has created a large tourism base for the economies of the coastal communities. Construction has played an

important role in the overall Southwest Florida economy and accommodated migration to and job growth for the area. Agriculture continues to be an important component of the overall regional economy, especially in the inland, rural communities. However, this lack of industry diversification was a key weakness for the region during the last economic downturn. It is important that Southwest Florida improve its position in other industries to develop a more resilient economy. Health care and distribution/logistics are two particular industries that the region could gain a competitive advantage.

Key challenges facing the regional community include the need to improve infrastructure necessary for competitive educational systems, transportation networks, workforce housing, and communication systems. Despite the relatively low-unemployment rates within the coastal counties, the rural non-coastal counties continue to have high unemployment and poverty rates. The unemployment rates in Glades and Hendry Counties stem from the need for the unemployed to acquire new skills and training to be competitive in the regional economy. New economic development projects, such as the Glades County Regional Training Center, aim to shorten the skills gap.

Illustration 2: Changing Industry Composition

Source: DEO Forum Presentation



Employment Growth

In July 2015, Naples was voted the top US city for job growth by Forbes magazine and Cape Coral was ranked third in the nation. Florida is beating all other states in adding professional and business jobs, and this is due in great part to Collier and Lee County's accelerated job growth.

A report by Florida's Department of Economic Opportunity shows that jobs in Collier County have increased in many areas such as in the information industry and business services, with manufacturing jobs increasing 9%. Leisure and hospitality jobs increased 7.9% in Lee County, the second highest increase in that sector in the state. Resurgence in the housing market is creating jobs in the construction industry as well.

In 2015 Governor Rick Scott's office recognized Collier County as the number one area in Florida for job growth in the business and professional sectors.

In 2015, the healthcare, education and retail trade industries were well represented at the top of the list. The healthcare industry is represented by Lee Health (10,900 employees), NCH Hospitals (7,000 employees) and Charlotte Regional Medical Center (3,950 employees). The education industry is represented by Lee County School District (10,600 employees), Collier County Public Schools (7,041 employees) and Charlotte County School District (2,140 employees). The retail trade industry is represented by Publix Super Markets (6,968 employees), Walmart Supercenter (3,792 employees), Winn-Dixie (2,248 employees) and Palm Automotive (2,656 employees).

Key employers in Southwest Florida include biofuels, healthcare, technology, apparel design, and sugar production, the Southwest Florida employers are the driving force behind this region's success. A few examples of some key employers in Southwest Florida include: Algenol Biofuels, Arthrex, Inc., Chico's FAS, Fox Electronics, Gartner, Inc., Hertz, Inc., Shaw Development, U.S. Sugar Corporation, and 21st Century Oncology, all of whom have their Global Headquarters in Southwest Florida.

Business Friendly Environment

Consistently ranked one of the best states for business, Florida is committed to keeping regulatory requirements and business taxes low. That, along with a strong economy and zero personal state income tax, makes it a great place to do business.

As part of the Southwest Florida Regional Economic Development Alliance, Charlotte, Collier, Lee, Glades, and Hendry Counties are all actively seeking to attract new companies and expand existing businesses in the area. According to the Alliance, this area boasts an international reputation for being not only a premiere vacation and retirement destination, but also an excellent place for business due to its growing economy and high standard of living. County and municipal incentive programs in these counties reimburse employers for expanding, relocating and creating jobs.

Health Care

From medical equipment and medical supplies manufacturing to the expanding healthcare industry, Southwest Florida is filled with opportunity for companies pioneering new innovations in this ever-growing industry.

Based in part on the large population of retirees in Southwest Florida, medical services have been (and will continue

to be) an ever-present need, creating opportunities for economic development and higher wage employment throughout the six-county region. A shift-share analysis was conducted for the region from 2015-2040 (this can be found in Appendix A). Among all 2 digit NAICS code industries, health care and social assistance had the largest share total by more than a 2:1 ratio of the next highest industry. Advanced research facilities, new and expanding hospital systems, and specialized training programs ensure that Southwest Florida will remain on the leading edge of healthcare's technological evolution.

Southwest Florida has some of the finest hospitals, physicians and healthcare facilities in the country including The Children's Hospital of Southwest Florida, the only comprehensive child healthcare facility between Tampa and Miami that provides vital healthcare for the region's children, from infancy through age 18. Provided below are the region's major healthcare facilities:

Charlotte County

Bayfront Health Punta Gorda
Bayfront Health Port Charlotte
Englewood Community Hospital
Fawcett Memorial Hospital

Collier County

Physician's Regional Medical Center
Naples Community Hospital
North Collier Hospital - NCH Healthcare System

Glades/Hendry Counties

Hendry Regional Medical Center

Lee County

Cape Coral Hospital
Lee Memorial Health System
Lee Memorial Hospital
Golisano Children's Hospital of Southwest Florida
Gulf Coast Hospital
Gulf Coast Medical Center
Health Park Medical Center
Lehigh Regional Hospital

Sarasota County

Englewood Community Hospital
Florida Hospital
Highlands Regional Medical Ctr
Sarasota Memorial
Peace River North Port Health Park

Financial Resources

The availability of financial resources to fund business ventures in the six counties makes Southwest Florida an impressive pro-business environment. A number of

financial resources are available for the establishment or expansion of business ventures in the area, including:

- Angel Funds
- Bank Financing
- Bond Financing (Industrial Development Authorities)
- Business Incubators/Consortiums
- Finance Companies
- Grants
- Import/Export Financing
- Investment Banks
- Leasing
- Public Offerings
- Small Business Loans
- Venture Capital

According to Enterprise Florida, the State has the nation's 2nd largest accounting industry, 3rd largest insurance industry, and 4th largest financial services industry. Throughout Florida, more than 851,000 total workers are employed in the finance and professional services industries.

The global competitiveness of Florida's essential value-added service providers is reflected in the fact that Florida's service exports to other countries are valued at over \$38.5 billion a year. Because of our prime location in the state, businesses in Southwest Florida's six counties are perfectly positioned to take advantage of the growing global marketplace.

As we enter a new era of intra-regional cooperation, Southwest Florida offers exciting growth opportunities for financial services businesses, as well as the chance to collaborate with other business sectors to help create a more dynamic regional economy.

Agriculture

Southwest Florida's farmers, growers and ranchers are among the state's most progressive producers and represent a major economic sector to the region's and state's economy. According to the Census of Agriculture, Southwest Florida has a total of 1,446,582 acres of agricultural land (37.8% of the region).

Economic Impacts

The total market value of Southwest Florida agricultural products sold equals over \$1 billion. Nearly \$500 million of that is from Hendry County (third highest county in the State). The region has an estimated 2,467 farms. 84.1% of that value comes from crop sales, while the other 15.9% comes from livestock sales. 27% of the Hendry County sales came from livestock, no other county in the region has higher than 8% (all data is from the 2012 Census of Agriculture). The major agricultural commodities produced in Southwest Florida include citrus, cattle, sugarcane, vegetables and ornamentals.

The University of Florida Institute of Food and Agricultural Sciences (IFAS) Extension estimated that the agriculture, natural resources, and food industries employed 189,694 workers and accounted for over \$9.5 billion value added in SWFL in 2014. That would account for 21.7% of workers and 16.3% of value added in the region. Those industries total 76.3% of workers and 82.3% of value added in Hendry County.

Critical Part of Florida Economy

IFAS further estimated that total agricultural output for the State was over \$155 billion in 2014 and the industry employed over 1.565 million workers. They further estimate that agriculture is either directly or indirectly responsible for 19.2% of State employment. In addition to its production of food and fiber, Florida Agriculture Commissioner Adam Putnam cites agriculture's values in water conservation and aquifer recharge, habitat protection and other natural resources conservation. He describes this centuries-old industry as a "critical pillar" of Florida's economy. Southwest Florida has been and is projected to remain one of the state's most critical agriculture production regions.

Education

Southwest Florida's economy depends on preparing today's students for jobs that haven't even been invented. To that end, top university and public schools leaders have committed themselves as a unified group to improve students' academic performance and career preparation.

This is a powerful start to aligning the region in order to be a player in the global workforce, today and into the future. Southwest Florida's education leaders intend to create a seamless web of educational opportunities; model regional educational cooperation to enhance quality and opportunity and to contribute to higher graduation rates and increased levels of job placements within SWFL; and strengthen ties with economic and workforce development in traditional and non-traditional ways to increase regional sustainable economic prosperity.

As can be seen in the Demographics section, the educational attainment of SWFL's workforce has significantly increased in recent years, thanks in part to the work of Florida Gulf Coast University (FGCU) and Florida SouthWestern State College (FSW). In Appendix A, Illustration A-2a, you can also see that the region's high school graduation rate has steadily increased over the last ten years.

Southwest Florida Demographics

Population

Like much of Florida, the Southwest Florida Region has experienced considerable population growth in the last few decades. Between 1980 and 2016, the region's population grew by 187 percent (see Illustration 3). During the same time frame, Florida's population grew by 107 percent, while total United States population grew by only 47 percent.

While population growth decreased from 2007-2009, the population has been steadily increasing since. (see Illustration 4).

Illustration 3: SWFL Population 1970-2015

Source: BEBR

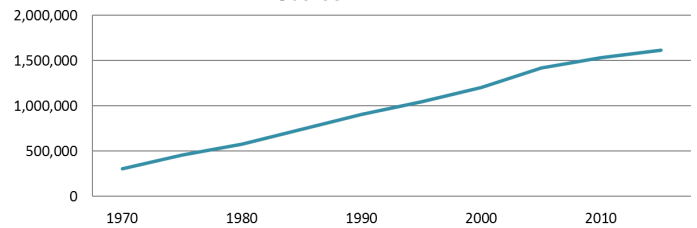
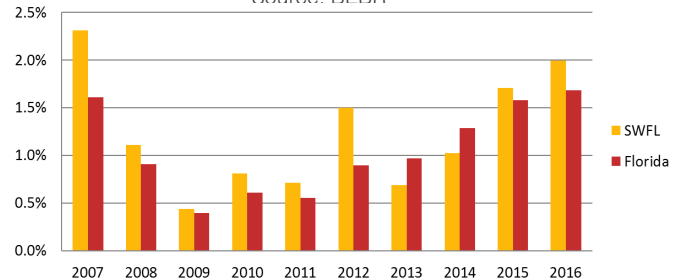


Illustration 4: Population Growth Rates

Source: BEBR

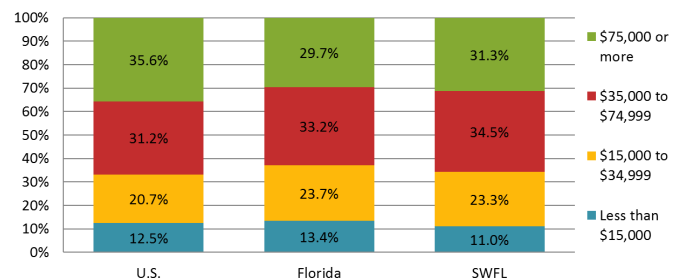


Income & Poverty

The median household income in the Southwest FL Region was \$50,443 according to 2015 five-year Census estimates. 11.0% of households have annual incomes below \$15,000, while 31.3 percent have incomes of \$75,000 or more (see Illustration 5). 13.9% of the population lives in poverty. (The poverty threshold, defined by the Census Bureau, varies depending on household size and other factors. In 2015, the threshold for a family of four, with two children, was \$24,250.) Poverty is much higher in the region's rural communities. Hendry County has a poverty rate of 25.8% and Glades County has a 22.1% rate.

Illustration 5: Household Income

Source: census.gov 2015



Unemployment Rate

In 2016, the region's unemployment rate was the lowest it has been since 2007 (4.7%). The unemployment rate reached its high point at 12.1% in 2010 and has steadily decreased every year since. Despite the region's overall recovery, Hendry County still has the highest unemployment rate in the State at 9.0%. (See Illustration 6)

Illustration 6: Avg Annual Unemployment Rate

Source: FL DEO

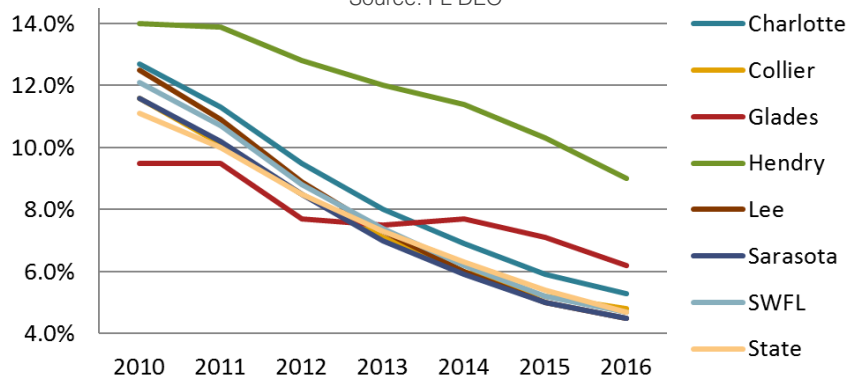


Table 4: Avg Annual Unemployment Rate

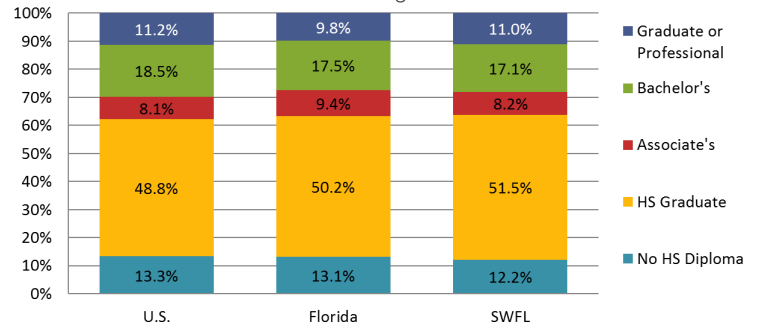
2010	12.1%
2011	10.7%
2012	8.8%
2013	7.4%
2014	6.2%
2015	5.2%
2016	4.7%

Source: FL DEO

Educational Attainment

According to 2015 Census estimates, 12.2% of adults aged 25 or older in our region do not have a high school diploma or equivalent (18.1% in 2009), while 28.1% hold a degree at the bachelor's level or higher (19.5% in 2009). These numbers show that there has been a vast improvement of the region's educational system over the last few years. Southwest Florida's educational attainment percentages are now comparable to the State as a whole and the rest of the nation. (See Illustration 7)

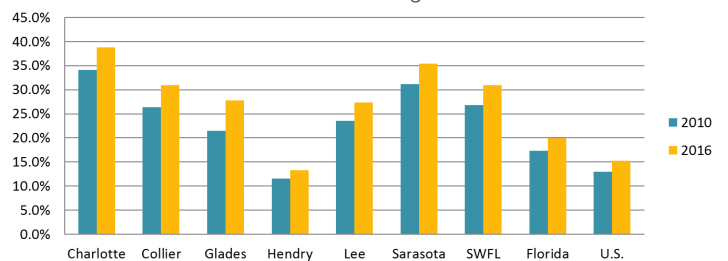
Illustration 7: Educational Attainment Population 25 & Over
Source: census.gov 2015



Elderly Population

According to the U.S. Census's 2016 estimates, 30.0% of Southwest Florida's residents are aged 65 years and over. This is 11% higher than the State estimate (19.9%) and more than twice the U.S. estimate (15.2%). The region's elderly population has grown 4.1% increase since 2010. The region's estimate is growing at a higher rate than the State (2.6% increase since 2010) and nation (2.2%). Charlotte County has the highest elderly population percentage in the region (38.8%). Hendry County, at 13.3%, is the only county in the region under 27%. Hendry County is also SWFL's only county below the national average.

Illustration 8: Population Age 65+
Source: census.gov



Geography

Southwest Florida is a diverse region located along the Gulf of Mexico. The region links together Florida's central urban corridor. The western coastal communities, southern metropolitan areas, and interior agricultural lands form patchwork of vibrant coastal cities; suburban communities along I-75, and rural farm towns.

There are six counties comprising the region: Charlotte, Collier, Glades, Hendry, Lee and Sarasota (see Illustration 11). The total area (land and water) of the region is 6,663 square miles and a land area of 5,986 square miles. Four of the counties border the Gulf of Mexico, with a total shoreline of 4,515 miles, and comprise a large portion of the region's urban area. Two counties are bounded by Lake Okeechobee, with a total of 135 miles of shoreline, the second largest freshwater lake in the United States.

The region includes world class beaches and significant tourism. The regional climate is very temperate with summer high temperatures averaging in the low to mid nineties and winter low temperatures averaging in the low to mid fifties. Average annual rainfall is approximately 55 inches.

Infrastructure

The lifestyle enjoyed by a community and its ability to

attract and sustain economic development is predicated on the quality of its public facilities and infrastructure. Indeed, as regions across the country and world are interconnected in a globally competitive economy it is critical for the Southwest Florida Region to develop, expand and maintain multi-modal transportation systems and telecommunication infrastructure to support a prosperous and globally competitive economy.

The World Economic Forum in its Global Competitiveness Report 2016-2017 makes the distinct point: "Extensive and efficient infrastructure is critical for ensuring the effective functioning of the economy."

The Global Competitiveness Report also stresses the importance of transportation networks. "Effective modes of transport, including quality roads, railroads, ports and air transport, enable entrepreneurs to get their goods and services to market in a secure and timely manner and facilitate the movement of workers to the most suitable jobs... Finally, a solid and extensive telecommunications network allows for a rapid and free flow of information, which increases overall economic efficiency by helping to ensure that business can communicate and decisions are made by economic actors taking into account all available relevant information."

In its report, Growth and Renewal in the United States: Retooling America's Economic Engine, McKinsey Global

Institute notes that building 21st-century infrastructure is a key imperative to advance sustainable GDP growth in the US.

Although the 2016-2017 Global Competiveness Report ranked the U.S. 12th out of 138 countries in quality of overall infrastructure. The American Society of Civil Engineers gave the U.S. a D+ in their 2017 Infrastructure Report Card. They further stated that there is currently close to \$2 trillion 10 year investment gap in infrastructure spending. The 2017 Infrastructure Report Card gave the State of Florida a C.

One troubling trend relates to the relatively low rate of broadband penetration in the country. With 32.5 subscribers out of 100, the United States ranks 15th in the world, effectively placing limits on economic activity (according to the Organisation for Economic Co-operation and Development's 2016 data). According to the SWFRPC's 2013 Broadband Study, 86% of surveyed residents and 90% of surveyed businesses in Charlotte, Collier, and Lee Counties have internet connections.

Having come out of one of the deepest national recessions, the region's leadership both public and private will need to come together to focus on making strategic investment decisions to fund existing and future infrastructure systems holistically. This will require coordinated economic development, land use, infrastructure, water and natural-resources decision-making.

Water

The Southwest Florida Region has abundant water resources. The bays, inlets, estuaries, rivers, lakes and streams in the region provide a valuable contribution to the area's economy. These waters are essential to tourism, recreation, commercial fishing, and the aesthetic characteristics of the region.

Freight, Logistics and Passenger Operations

Airports

The majority of the Southwest Florida's scheduled airline passenger and shipping service are provided by regional facilities such as the Southwest Florida International Airport, Charlotte County Airport, and the Sarasota/Bradenton International Airport. Other smaller facilities such as the Naples Airport also support limited commercial passenger service. There are a number of additional airports that accommodate charter and general aviation traffic and include: Page Field in Lee County; Buchan Field and Venice Airport in Sarasota County; the Labelle Airport and Airglades Airport in Hendry County; and the Marco Island, Everglades City, and Immokalee Regional Airports in Collier County.

Southwest Florida International Airport (RSW) is a

commercial service airport located in Fort Myers. The airport served more than 8.6 million passengers in 2016 and is one of the top 50 U.S. airports in passenger traffic. In addition to passengers, the airport serves as an important cargo facility for Southwest Florida. In 2016 more than 32 million pounds of freight moved through RSW. Page Field General Aviation Airport (FMY) serves as a reliever facility to RSW. The airport accommodates a significant amount of corporate and business-related traffic, as well as recreational and flight training activity.

Southwest Florida International Airport is an important contributor to the region's social and economic well being. The Florida Department of Transportation (FDOT) conducted a Statewide Aviation Economic Impact Study began in April 2013 and was completed in August 2014. The study showed that Southwest Florida International Airport (RSW) contributed nearly \$4.3 billion to the local economy from airport and related-airport activities and accounted for 45,562 jobs. The study also examined the economic impacts of Page Field (FMY), the general aviation and reliever airport operated by the Lee County Port Authority. The FDOT study showed Page Field's contribution was \$109.3 million in 2016 and that the airport is responsible for more than 1,101 jobs.

The Punta Gorda Airport has been booming in recent year. In 2016, the Airport served 1,098,115 total passengers. This is over a 500% increase from the 182,423 passengers that the airport had in 2010. According to a 2017 analysis by Voltaire Aviation Consulting, the Airport is responsible for 3,618 FTE jobs with \$110.4 million in annual labor income with \$353.2 million in annual economic output in the Southwest Florida region. Western Michigan University (WMU) will further benefit the aviation industry in Charlotte County. WMU will launch pilot training (aviation flight science) and aviation maintenance technology programs, each leading to a bachelor's degree, beginning fall 2017.

Naples Municipal Airport is home to flight schools, air charter operators and corporate aviation and non-aviation businesses as well as fire/rescue services, mosquito control, car rental agencies and the Collier County Sheriff's Aviation Unit. All funds used for the airport's operation, maintenance and improvements are generated from activities at the airport or from federal and state grants; the airport receives no property tax dollars. During 2016, the airport accommodated more than 95,000 takeoffs and landing. FDOT values the airport's economic impact to the community at more than \$283 million annually.

Freight & Logistics

Trucking and the movement of goods and freight play critically important roles in the regional, state, and global economy. According to FDOT, 77% of freight in Florida is carried exclusively by truck. Trucks are the dominant mode of transportation for businesses shipping goods into

and out of the Southwest Florida region.

Enterprise Florida addresses logistics and distribution as big business in Florida, where the broader wholesale trade, transportation and logistics industry employs more than half a million Floridians. Of those, some 99,000 residents work at companies specifically providing logistics & distribution services. Nearly every major global logistics integrator already has a presence in the state, including the headquarters for Ryder System, Inc., Landstar System Inc., CEVA Logistics U.S., Inc. and other top logistics companies. As the Western Hemisphere's commercial gateway, Florida's logistics & distribution industry is poised to grow further with the completion of the Panama Canal expansion in 2016 and the numerous infrastructure developments and upgrades underway around the state.

The Florida Chamber Foundation's Florida Trade and Logistics Study indicates several trends will position Florida for a larger, more commanding role as a trade hub in the next decade. Florida currently has more than 55,000 companies exporting goods and services in the global marketplace and the Florida Chamber is leading the effort to expand Florida's trade and export opportunities. We are committed to substantially increasing the number of both domestic and international exports as we work toward making Florida a global hub for trade and investment.

Southwest Florida has taken many steps towards building a strong logistics and distribution industry. In 2015, Chaney Brothers opened a 345,000 square foot distribution center in Charlotte County. With Chaney Brothers, as well as Walmart, Budweiser, and Blue Bell distributions centers already in place, the County is looking to build a distribution hub near the Punta Gorda Airport. The County's proximity to the Port Manatee, along with widening of the Panama Canal, makes it a competitive distribution location.

Glades County is also looking to expand its logistics industry. The America's Gateway Logistics Center is a nearly \$8 million, 770 acre, project that is currently in the final step of its first phase. Strategically located in the center of the State, America's Gateway will be able to reach four major ports and four major air cargo operations within 2.5 hours drive time. The Center also includes a Business and Commerce Park. The Park's first tenant, Love's Travel Stop, opened an \$11 million facility in 2017.

Rail Service

Seminole Gulf Railroad continues to operate freight service to Southwest Florida via one short-rail line using connections with the CSX line in Arcadia. There is no intermodal terminal in Southwest Florida where containers and trailers on flatcars can be loaded and unloaded. Since Southwest Florida has no water based port facilities, the lack of intermodal access means that there are few alternatives to the highway system for most types of shipment goods into and out of the region.

Eco-Tourism

Florida contains a diversity of natural and cultural wonders. Although national and state parks and forests abound throughout the state, many of Florida's private landowners also have the potential to show off some of Florida's unique natural and cultural attractions. Nature based tourism is a comparatively new industry in Florida, and it is rich with potential benefits for Florida's landowners and business operators. Relatively few businesses have taken advantage of nature as a tourism opportunity and opened their lands to visitors. However, the businesses that have, offer valuable lessons for other businesses potentially interested by sharing their resources with visitors.

Big Water Heritage Trail

The Big Water Heritage Trail is a driving heritage trail that identifies, links, and marks sites of historical, cultural, natural, recreational and educational importance to the area. The Big Water Heritage Trail encompasses five counties surrounding Lake Okeechobee in Florida. The trail's name is derived from the Seminole word for Okeechobee, which means "Big Water". To view the brochure, please visit: www.swfrpc.org

Energy

Electrical Power

Currently within the Southwest Florida Region, there are five companies that supply electric service to the area. These companies are:

1. Glades Electric Cooperative;
2. Lee County Electric Cooperative;
3. Florida Power and Light Company;
4. Peace River Electric Cooperative; and
5. Clewiston Electric Utilities.

The cooperatives purchase power from the Florida Power and Light Company and Seminole Electric Cooperative. Glades Electric Cooperative provides power to the majority of Glades and Hendry Counties. The Peace River Electric Cooperative provides power to a small section of rural Sarasota County. In addition, the Clewiston Electric Company provides electricity to its incorporated area in Hendry County. Lee County Electric Cooperative purchases its power from the Seminole Electric Cooperative, a generation and transmission utility located in Palatka, Florida

B. SWOT Analysis

Early in 2017, 66 stakeholders in the SWFL regional economy attended town hall meetings held by the Florida Chamber Foundation in Lee and Sarasota Counties to add input to their Florida 2030 plan. The Chamber Foundation asked the attendees to evaluate the state of their community. This information was used to create a SWOT analysis for SWFL. Attendees were asked to classify aspects of the community into one of four categories:

- Strength & Improving
- Strength but Weakening
- Weakness but Improving
- Weakness & Getting Worse

Workforce/Affordable Housing:

Housing affordability stands out as the biggest weakness in the region based on the surveys. 84% of attendees classified housing affordability as “Weakness & Getting Worse”. Overall, 89% viewed it as a weakness and 92% believe it is weakening/getting worse. More participants agreed on affordable housing than any other category. Workforce housing was constantly brought up as a key weakness of the region during other outreach meetings for the CEDS update. On April 20, 2017 the SWFRPC held an Affordable Housing Workshop featuring a speaker from the Florida Housing Coalition to educate elected officials and other stakeholders on the workforce/affordable housing issue.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	3%	2	Strength	11%	8
Strength but Weakening	8%	5	Weakness	89%	59
Weakness but Improving	5%	3	Improving	8%	5
Weakness & Getting Worse	84%	56	Weakening	92%	61

Transportation:

Transportation is another perceived weakness of the region. 52% saw transportation as “Weakness & Getting Worse”; with 83% categorizing it as a weakness, and 64% see it as weakening. Transportation was another issue that continually came up as a key weakness of the region during other outreach meetings for the CEDS update. A Vital Project in the 2018-2022 CEDS Plan is the Regional Transportation Plan that seeks to improve transportation between counties. The SWFRPC is currently having discussions with the region’s Metropolitan Planning Organizations (MPOs) and the Florida Department of Transportation (FDOT) to create the plan and associated maps.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	4%	3	Strength	17%	11
Strength but Weakening	12%	8	Weakness	83%	55
Weakness but Improving	31%	21	Improving	36%	23
Weakness & Getting Worse	52%	34	Weakening	64%	42

Water Infrastructure:

Water infrastructure is the final category that is viewed as “Weakness & Getting Worse” (43%). 69% see it as a weakness and 60% think it’s getting worse. SWFL experienced issues with releases and storage in Lake Okeechobee in 2016. The State government responded in 2017 with Senate Bill 10, which expedites the design and construction of a reservoir to reduce high-volume discharges from Lake Okeechobee and includes \$33 million for FY17-18 implementation.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	14%	4	Strength	31%	10
Strength but Weakening	17%	5	Weakness	69%	21
Weakness but Improving	26%	8	Improving	40%	12
Weakness & Getting Worse	43%	13	Weakening	60%	19

Public Safety:

Public safety is seen a strength of the region. 56% classified it as “Strength and Improving”. 86% viewed it as a strength and 63% see it improving (the only category to have both strength and improving voted higher than 50%). According to the research web site BackgroundChecks.org there are six Southwest Florida cities that ranked among the top 50 safest in the state in 2016: Punta Gorda (#2), Marco Island (3), Cape Coral (14), Naples (19), Venice (24), and North Port (31).

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	56%	17	Strength	86%	27
Strength but Weakening	30%	9	Weakness	14%	4
Weakness but Improving	7%	2	Improving	63%	20
Weakness & Getting Worse	7%	2	Weakening	37%	11

Quality of Life: Economic Prosperity:

Quality of Life was also voted “Strength and Improving” (36%), however voters overall were split 50-50 on whether it was a strength or weakness. Quality of life was seen as improving by 68% of participants. Quality of life Vital Projects in the CEDS plan include the Fort Myers Riverfront Redevelopment Project, Warm Mineral Springs, and West Villages.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	36%	24	Strength	50%	33
Strength but Weakening	14%	9	Weakness	50%	33
Weakness but Improving	32%	21	Improving	68%	45
Weakness & Getting Worse	18%	12	Weakening	32%	21

Talent Pipeline:

Stakeholders heavily agreed that the talent pipeline was a “Weakness, but Improving” with a 72% vote (the most agreeable category other than affordable housing). Although 81% view it as a weakness, an overwhelming 89% see it improving. This speaks to the ongoing education initiatives in the region in including Florida Gulf Coast University (FGCU) and Florida SouthWestern State College (FSW). The recent announcement that Western Michigan University will be offering programs in Charlotte County will further improve the talent pipeline. The Glades County Regional Training Center is a CEDS Vital Project that will further improve the talent supply in SWFL. The educational attainment statistics in Illustration 10 show the improvement in the region’s talent pool.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	16%	11	Strength	19%	13
Strength but Weakening	3%	2	Weakness	81%	54
Weakness but Improving	72%	48	Improving	89%	59
Weakness & Getting Worse	9%	6	Weakening	12%	8

Health & Wellness:

41% of participants saw health & wellness as a “Weakness but Improving”, however a clear consensus wasn’t reached on whether it is a strength or weakness (52% weakness). Voters were much more agreeable on if health & wellness was improving or weakening (78% improving). Lee Memorial Hospital and HealthPark Medical Center have been named two of the top 50 hospitals in the nation by Healthgrades.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	37%	11	Strength	48%	15
Strength but Weakening	11%	3	Weakness	52%	16
Weakness but Improving	41%	13	Improving	78%	24
Weakness & Getting Worse	11%	3	Weakening	22%	7

Arts, Culture, Heritage, Sense of Place:

Arts, culture, heritage, and sense of place are seen as “Weakness but Improving” by 55% of participants. 84% see it as weakening and 68% see it as a weakness. Much of the population boom in SWFL comes from people moving from out-of-State. This has made it more difficult for the coastal communities to develop that heritage and sense of place in the past.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	29%	9	Strength	32%	10
Strength but Weakening	3%	1	Weakness	68%	21
Weakness but Improving	55%	17	Improving	84%	26
Weakness & Getting Worse	13%	4	Weakening	16%	5

Economic Development:

Economic development is another area that stakeholders see as a “Weakness but Improving” (58%). Overall, 71% see it as a weakness and 78% see it improving. There are several CEDS Vital Projects in the Economic Development Pillar including the Immokalee Culinary Arts and Production Campus, Charlotte County Incubator, Americas Gateway Logistics Center, Southwest Florida International Airport Improvements, and AirGlades Airport Development. A Regional Economic Development Opportunity Map is another key project that the Economic Development District is focused on.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	20%	13	Strength	30%	20
Strength but Weakening	10%	7	Weakness	71%	47
Weakness but Improving	58%	38	Improving	78%	51
Weakness & Getting Worse	13%	8	Weakening	23%	15

Governance: Responsive Government:

Participants also voted responsive government in the “Weakness but Improving” category (57%). It was a weakness in the eyes of 84% of participants, but 70% see it improving. The SWFL Promise Zone is a Vital Governance Project. The Promise Zone is a federal designation given to the region’s rural communities (Hendry County, Glades County, and Immokalee in Collier County). The Promise Zone brings local governments together to address key issues in those communities such as high poverty and unemployment.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	13%	9	Strength	17%	11
Strength but Weakening	3%	2	Weakness	84%	55
Weakness but Improving	57%	38	Improving	70%	46
Weakness & Getting Worse	27%	18	Weakening	30%	20

Business Climate: Regulations:

Regulations are seen as “Weakness but Improving” by 48% of the stakeholders. It was considered a weakness by 66% of voters and improving by 69% of voters.

Category	Percent	Votes	Category	Percent	Votes
Strength & Improving	21%	14	Strength	34%	23
Strength but Weakening	13%	9	Weakness	66%	44
Weakness but Improving	48%	32	Improving	69%	45
Weakness & Getting Worse	18%	12	Weakening	31%	21

NOTE: Water Infrastructure, Health & Wellness, Public Safety, and Arts, Culture, Heritage, & Sense of Place were only discussed and voted on in the Lee County meeting (the Lee County meeting featured stakeholders from all six counties in the region).

Survey Conclusions:

The town hall meeting participants clearly saw affordable housing, transportation, and water infrastructure as weaknesses of the region. Public safety was considered a strength. The participants saw many strong opportunities for improvement including quality of life, talent pipeline, and arts and culture. Overall, 89% of the stakeholders stated they were optimistic about Florida’s future.

Additional Areas of Consideration:

Outside of the town hall meetings, potential growth in the healthcare/medical device and distribution/logistics industries are considered to be great opportunities for the region. The addition of Western Michigan University to the region’s already growing educational network is another cause for optimism. The region’s airport capabilities are an existing strength that only project to grow stronger over time. The region’s climate and beaches may be its greatest strength as it is the primary driver of SWFL’s tourism industry.

designated as a Federal Promise Zone by the White House. This includes Hendry County, Glades County, and the Immokalee community in Collier County. This designation was awarded due to the area’s high poverty and unemployment rates. The Promise Zones designation will allow these communities to receive preferential consideration for federal grant programs, state and federal liaisons to assist in navigating federal programs/agencies, technical assistance from federal agencies, an allocation of VISTA volunteers to assist in capacity building activities. The Promise Zone is a tremendous opportunity to address the needs of Southwest Florida’s most economically distressed communities.

Industry Diversification is another current weakness of the region. Southwest Florida’s economy is currently dependent on tourism, construction, and agriculture. However, as noted above, there is reason to believe the regional economy can diversify in the near future. Potential climate change and changes in funding structures are external threats that could have adverse impacts on the regional economy.

In 2016, Southwest Florida’s rural communities were

C. Strategic Direction

Goals and Objectives

Vision Statement: Increase industry diversification in Southwest Florida by developing a talented workforce, recruiting new businesses, and marketing the region's business friendly environment while enhancing the region's high quality of life.

Invest in People

1. Talent Supply & Education

Goal 1.1: Provide sufficient funding and encourage flexibility to allow regional stakeholders to address local needs in education, training and workforce development.

Objective 1.1.1: Adequate funding shall be available to provide education and training.

Objective 1.1.2: Build a sufficiently skilled workforce to meet future employment demands.

Objective 1.1.3: Become a national leader in providing financial resources to support workforce training and skill development programs

Goal 1.2: Ensure educational systems and workforce training that support innovation and creativity.

Objective 1.2.1: Review policies and rules to identify barriers to innovation and creativity in schools.

Objective 1.2.2: Support the growth and expansion of universities and institutions of higher learning and programs that complement economic development and diversification.

Objective 1.2.3: Encourage institutions of higher learning to develop cooperative and integrated curriculums that enhance and increase the productivity of the local work force and attract industries and skilled workers.

2. Quality Of Life & Quality Places

Goal 2.1: Protect natural resources to support quality environment and eco-tourism.

Objective 2.1.1: Provide for connectivity of targeted conservation and preservation lands on both public and private lands.

Objective 2.1.2: Increase conservation lands by supporting local government incentives through Comprehensive Plan provisions, tax incentives, and other innovative programs to encourage landowners to participate in conservation programs.

Objective 2.1.3: encourage the preservation of sensitive natural resources, including beaches, wetlands, estuaries, clean air and water, historic

resources, scenic vistas and other unique natural resources.

Goal 2.2: Develop projects that improve the region's quality of life.

Objective 2.2.1: Integrate alternative modes of travel, including walkability, in new and existing communities.

Objective 2.2.2: Promote safe, healthy built environments and ensure access to high quality healthcare, including primary, specialty, and ancillary services.

Goal 2.3: Increase the supply of workforce housing in the region.

Objective 2.3.1: Identify appropriate workforce housing definitions and standards for each individual community in the region.

Objective 2.3.2: Encourage the development of workforce housing with local governments and developers.

Objective 2.3.3: Expand housing options that support the local workforce by planning development near employment and transportation centers.

Goal 2.4: Expand arts and cultural identity.

Objective 2.4.1: Encourage the development of diverse cultural facilities, through public, private, or public/private partnerships, that meet the needs of the residents and visitors of Southwest Florida.

Objective 2.4.2: Promote arts and culture into the social and economic fabric of the region.

Invest in Places

3. Infrastructure & Growth Leadership

Goal 3.1: Develop transportation systems to support a prosperous, globally competitive economy while minimizing impacts to the natural environment.

Objective 3.1.1: Develop a plan for the design and funding of a multimodal, interconnected transportation system that sustains local liveability and serves regional hubs for global, national, and state distribution of goods and movement of people.

Objective 3.1.2: Anticipate and meet the expanding mobility needs of residents, businesses, and visitors.

Objective 3.1.3: Ensure that future infrastructure is planned with minimal impact to natural resources.

Goal 3.2: Promote available ready-sites and buildings

Objective 3.2.1: Develop an interactive, regional opportunity map that identifies and highlights ready-sites

Objective 3.2.2: Support up-to-date infrastructure and adaptive reuse of buildings.

4. Civic & Governance Systems

Goal 4.1: Improve public/private/civic cooperation, collaboration, and communication of the Region's economic strategies.

Objective 4.1.1: Cooperate on a regional communications, marketing, and programming plan to strengthen and promote a sense of regional identity, expand opportunities, and increase youth retention.

Goal 4.2: Improve regional coordination of economic development, land use, infrastructure, water and natural resource decision making.

Objective 4.2.1: Coordinate local government comprehensive planning and regional strategic planning with capital improvement projects to further Regional goals.

Goal 4.3: Support the region's growing elderly population.

Objective 4.3.1: Cooperate with state entities and other social service providers to encourage the establishment of programs and facilities that assist the elderly population of the region.

Support Businesses

5. Business Climate & Competitiveness

Goal 5.1: Develop projects and programs that support existing and new business.

Objective 5.1.1: Support business retention and expansion efforts that target high growth companies.

Objective 5.1.2: Support the implementation of land use and zoning regulations that encourage the attraction, retention and expansion of business that diversify the economic base.

Goal 5.2: Increase investment in business development and placement in the Region.

Objective 5.2.2: Monitor and advocate for the elimination of internal processes and regulatory policies that are unreasonable barriers to economic growth, duplicative in nature or otherwise adversely impact small businesses disproportionately.

Objective 5.2.1: Establish a clearinghouse that combines resources and initiatives of all business development initiatives of local jurisdictions in the region to incorporate one regional effort to educate and assist businesses locate and grow.

Objective 5.2.3: Maintain competitive incentives to attract and retain diverse employers.

Goal 5.3: Monitor CEDS Performance Measures.

Objective 5.3.1: Create a regional data collection repository by industry and county.

Objective 5.3.2: Establish and evaluate performance measure criteria.

6. Innovation & Economic Development

Goal 6.1: Provide funding for ongoing economic development activities.

Objective 6.1.1: Establish funding mechanisms for ongoing economic development activities.

Goal 6.2: Provide technical assistance and use new technology to promote job growth.

Objective 6.2.1: Identify technical assistance programs that are available on a regional scale and facilitate the delivery of technical assistance to the region's workforce through technology.

Goal 6.3: Build seamless information technology infrastructure.

Objective 6.3.1: Identify opportunities for public/private coordination of information, and establish protocol for integrating information technology infrastructure for the region.

Goal 6.4: Encourage alternative energy production and green product industries.

Objective 6.4.1: Establish a work group including representatives from all the alternative energy initiatives of local jurisdictions in the region to incorporate one regional effort.

Objective 6.4.2: Quantify the renewable energy resources existing in the region and determine feasibility of developing the region's energy production further, including the potential for exporting power produced by renewable energy in the Region to the State's coastal grids.

Goal 6.5: Brand the region as a hub to attract and retain entrepreneurs.

Objective 6.5.1: Complete an asset map of the region identifying incubators; entrepreneurial support services; venture capital organizations; and urban centers that provide live/work opportunities.

Objective 6.5.2: Promote and support co-work spaces, incubators accelerators and accessible capital funds.

Objective 6.5.3: Support entrepreneur leaders and the entrepreneur ecosystem.

Objective 6.5.4: Support a strong network of entrepreneur support organizations.

D. CEDS Plan of Action

Each Pillar Becomes a Target Area in the Plan

Plan of Action

The plan of action implements the goals and objectives of the CEDS in a manner that:

1. Maximizes effective development and workforce growth consistent with any applicable State or local workforce investment strategy-Talent Supply & Education
2. Obtains and utilizes adequate funds and other resources-Innovation & Economic Development
3. Fosters effective transportation access, promotes the use of technology in economic development, including access to high-speed telecommunications-Infrastructure & Growth Leadership
4. Promotes economic development and opportunity-Business Climate & Competitiveness
5. Balances resources through sound management of physical development-Civic & Governance Systems
6. Enhances and protects the environment-Quality of Life & Quality Places

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

The following actions shall occur:

- The CEDS Committee shall meet quarterly to monitor status of regional projects,
- The SWFRPC shall monitor status of regional coordination,
- The SWFRPC shall report on performance measures,
- The SWFRPC and CEDS Committee will recommend new regional projects,
- County Economic Development staff, FHERO (Florida Heartland Economic Region of Opportunity), and Workforce staff shall track key indicators, and
- SWFRPC shall convene meetings, compile project status and report to EDA.

SWFRPC staff, functioning as the EDD staff, will continue to coordinate the CEDS plans by participating in the

economic development activities in the region, as well as on local and statewide levels; and by fostering public-private partnerships.

State Economic Development Priorities

In developing the CEDS and assessing the Goals, Objectives, Programs and Projects, the CEDS Committee remained cognizant of the State-wide economic development efforts of the Florida Chamber of Commerce. The end result is a CEDS that is consistent with, and furthers the efforts of, The Florida 2030 Project.

As illustrated by the Programs and Projects adopted as part of the CEDS, Southwest Florida's economic development objectives parallel the State's goals to: attract and retain globally competitive businesses; create and retain high paying jobs; and maintain a high quality of life throughout Florida.

In addition to being coordinated with Florida's economic development priorities and programs, the CEDS was coordinated with the Regional Economic Development Agencies and Workforce Board.

Performance Measures

1. Number of Jobs Created After Implementation of the Comprehensive Economic Development Strategy
 - a. Total Employment in Initial Year- by County and Region
 - b. Total Employment in Each Year- by County and Region
2. Number and Types of Public Sector Investments Undertaken in the Region
 - a. EDA Sponsored Investments
 - b. Significant State and Local Investments
3. Number of Jobs Retained in the Region
 - a. Number of Jobs Retained as a Result of Federal Investments
 - b. Number of Jobs Retained as a Result of Select State and Local Investments
4. Amount of Private Sector Investment in the Region After Implementation of the Comprehensive Economic Development Strategy
5. Changes in the Economic Environment of the Region
 - a. Housing Costs
 - b. Educational Attainment
 - c. Age Cohort Growth in Workforce Age
 - d. Change in Commercial & Residential Building Permits
 - e. Change in Wages & Income
 - f. Change in Employment by Industry

E. Strategic Projects, Programs & Activities

Priority Projects Under Each Pillar

Project Ranking Criteria

Methodology

Development of the 2017-2022 project list was a collaborative effort involving the CEDS Working Committee, localities, other agencies responsible for economic development initiatives. Staff solicited projects for inclusion in the Five Year Plan from the CEDS Working Committee, the Seminole Tribe of Florida, the 23 local governments throughout the region, and other agencies known to have active economic and/or community development projects in the region. The SWFRPC included a comprehensive public outreach campaign to educate and engage local residents to provide input into the CEDS process. Additionally, SWFRPC staff reviewed a number of existing plans, strategies, and regional economic development studies for additional proposed projects.

In order to ensure consistency with the State DEO Five Year Strategic Plan and the Six Pillars framework, staff had to utilize various methods to determine the final Vital Projects list. Deviation from the ranking criteria was necessary due to the many different assumptions and interpretations of the Oversight Committee and the CEDS working Committee. The ranking system was not as useful as expected. Therefore, staff made the final determinations based on regional support, EDA's investment priorities, and project readiness. The CEDS Working Committee was committed to six vital program areas that embraced almost all of the identified projects submitted by the localities in the region. Additionally, these program areas aligned well with the Six Pillars framework. Staff was able to further translate findings from the ranking list and capture regional importance from the substantial input gathered at the various meetings held throughout the region resulting in the final economic project categories below. The CEDS Working Committee as well as the Strategy Committee approved the Vital Project List

The Oversight Committee and CEDS Working Committee used the criteria listed below to evaluate the 55 projects included in the 2017-2022, Five Year CEDS Plan. These criteria were applied to each project to calculate a score, and the highest scoring projects were assigned to the Vital Project List. The CEDS Working Committee forwarded the proposed Vital Project List to the CEDS Working Committee for approval, with final approval granted by the SWFRPC.

1. Project is in accord with U. S. EDA's Investment Policy Guidelines

- a. Meets at least four of the Investment Priorities including 1, 2, 3, (8 points)
 - b. Meets three of the Investment Priorities (6 points)
 - c. Meets two of the Investment Priorities (4 points)
 - d. Meets one of the Investment Priorities (2 points)
 - e. Meets none of the Investment Priorities (0 points)
2. Project demonstrates positive regional significance (positive multi- jurisdictional impacts)
 - a. Project will likely impact the majority of the region's planning area (8 points)
 - b. Project will likely impact at least two to three counties (4 points)
 - c. Project not likely to impact more than one county (0 points)
 3. Project will lead to private investment and new tax revenues
 - a. Contributes to private investment and new tax revenue (6 points)
 - b. Contributes to private investment or new tax revenues (3 points)
 - c. No/Insufficient information (0 points)
 4. Project Readiness
 - a. Engineering, costs, & approval substantially complete; site control and funding sources identified (6 points)
 - b. Preliminary engineering, costs, scope developed (4 points)
 - c. Feasibility study completed (2 points)
 - d. Feasibility study in progress (1 point)
 - e. Early planning stage (0 points)

The 2017-2022 Project list includes 55 individual projects, representing the priorities of the SWFRPC localities and the various agencies involved in economic development related activities in the SWFRPC Region. The following is a discussion of the methodology followed in developing this list of vital projects.

Economic Project Categories

Projects identified as economic development opportunities for the Region have been divided into the following three groups based on strategic fit and technical readiness. They are as follows:

VITAL PROJECTS

Top prioritized projects strategically fitting the Region’s goals as well as the EDA’s (or another major funding source’s) goals and are technically ready to implement.

IMPORTANT PROJECTS

Projects that are deemed important due to potential impact and importance to the region, but aren’t technically ready to implement.

FUTURE PROJECTS

Projects on the horizon that are expected to be developed further within the next five years. This list is an overview of potential projects; new projects may arise at any time.

Table 16: Vital Projects

Vital Project	Lead Organization	Status
Charlotte County Incubator	Charlotte County	In Progress
Murdock Village	Charlotte County	In Progress
Expansion of the Immokalee/Naples Business Development Center to include Incubators/Accelerators	Collier County	In Progress
Fort Myers Riverfront Redevelopment Project	Fort Myers/CRA/ Lee County	In Progress
Logistics Center (America Gateway Logistics - Phase 1)	Glades County	In Progress
Develop Material Handling Industry of America (MHIA) Training Center for Logistics/manufacturing	Glades/Hendry Counties	In Progress
AirGlades Airport Development	Hendry County	In Progress
Warm Mineral Springs	City of North Port	Pre-planning
Southwest Florida International Airport Improvements	Lee County Port Authority	In Progress
Repositioning the talent delivery system in the Southwest Florida Region	SWF Workforce Development Board	In Progress
Regional Transportation Plan	SWFRPC/MPOs	In Progress
Regional Economic Development Opportunity Map	SWFRPC/Economic Development Directors	In Progress
Promise Zone	SWFRPC	In Progress
West Villages	City of North Port	In Progress
Charlotte Harbor Redevelopment Catalyst Project	Charlotte County	In Progress
SWFL Enterprise Center Commercial Kitchen	SWFL Enterprise Center	Planning
Multi-Family Housing for Essential Service Employees	Hendry County Area Housing Commission	Planning
Four Corners Stormwater/Water Quality Project	Hendry County Public Works	In Progress
Wastewater Infrastructure on US27/SR80	Hendry County Public Works	Planning
Tiger Village	Promise Area Community Development Corporation	Planning
47th Terrace Improvements	City of Cape Coral	Planning
Academic Village	City of Cape Coral	Planning
Bimini Basin	City of Cape Coral	Planning
Burnt Store Rd. City Parcel	City of Cape Coral	Planning
Cape Coral UEP & Fiber Optic	City of Cape Coral	Planning
Festival Park	City of Cape Coral	Planning
Kismet Industrial Park	City of Cape Coral	Planning
Seven Islands	City of Cape Coral	Planning
Preservation of the Rural Counties Tax Base	SWFRPC	Planning
Punta Gorda Interstate Airport Park (i.e. ECAP) - Piper Road Extension and Infrastructure Improvements	Charlotte County	Planning
Charlotte County Residential Centers / Employment Hubs - Vehicular and Pedestrian Interconnectivity	Charlotte County	Planning
Preservation of the Rural Counties Tax Base	SWFRPC	Planning
Completed		
Establish partnerships for the creation of a Regional Economic Development Agency to promote centralized data and regional marketing efforts	Regional EDO's/FGCU	Completed
Regional Pre-Machining Training	SWF Workforce Development Board/I-Tech/Immokalee	Completed
CNC Training	SWF Workforce Development Board/I-Tech/Immokalee	Completed

Table 16: Vital Projects

Vital Project	Lead Organization	Status
Create an Ad-Hoc Committee to evaluate and recommend legal & regulatory reform to address government efficiency.	SWFRPC	Completed
Prepare a regional plan and identify place-making projects that improve the quality of life	SWFRPC	Completed

Table 17: Important Projects

Important Projects	Program	Status
GrowFL - Economic Gardening	Regional Entrepreneurial Support	In Progress
Identify solutions to "food deserts"	Industry Cluster Development	In Progress
Regional Industry Cluster Study	Industry Cluster Development	Pre-Planning
VA Clinic & Development of Veteran's Investment Zone	Regional Innovation	In Progress
Widening of Sumter Boulevard as a hurricane evacuation route – City of North Port	Regional Infrastructure	In Progress
Road Bond Project – City of North Port	Regional Infrastructure	In Progress
Water Expansion Pilot Program – City of North Port	Regional Infrastructure	Pre-Planning
Punta Gorda Interstate Airport Park	Innovation & Economic Development	In Progress
Downtown & Central Fort Myers Redevelopment (CRA)	Industry Cluster Development	In Progress
Future Makers- Southwest Florida Community Foundation	Innovation & Economic Development	In Progress
Regional Broadband Plan (Collier, Charlotte and Lee)	Regional Infrastructure	Completed 2013
Eastern Immokalee Sidewalk Project	Regional Infrastructure	Pre-Planning
Immokalee Sidewalk Improvement Project	Regional Infrastructure	Pre-Planning
Eleven Bridge Replacements Project-Collier County	Regional Infrastructure	Pre-Planning
Immokalee Stormwater Improvement Program	Regional Infrastructure	Pre-Planning
SR 29 (Main Street) Improvements-Immokalee	Regional Infrastructure	Pre-Planning

Table 18: Future Projects

Future Projects	Program	Status
Prevent Childhood Obesity by Building Healthy Habits	Regional Education and Training Focus	Pre-Planning
Farmland preservation and sustainable agricultural practices	Regional Entrepreneurial Support	Pre-Planning
Agriculture Impact and Strategy Study	Industry Cluster Development	Pre-Planning

F. Disaster & Economic Recovery & Resiliency

Introduction

Since its designation as an Economic Development District (EDD) in 1992, the Council has worked to promote economic development in the six-county region that it serves. The District provides the link between federal and state programs, and the local level where development actually occurs.

Each of the six counties within SWFRPC region has completed their own Federal Emergency Management Agency (FEMA) approved Hazard Mitigation Plan. These plans are updated once every five years, and they identify goals and strategies to reduce the impacts of future hazards. When requested, SWFRPC works with its county emergency managers to keep each plan updated and assists its communities with hazard mitigation project applications. SWFRPC will continue to provide education and awareness about the economic impacts of disasters, recovery, best practices, and develop action steps that work towards community economic resiliency.

What is Economic Resilience?

Regional economic prosperity is linked to the District's ability to withstand, prevent, or quickly recover from major disruptions to its underlying economic base; or, its economic resilience. The context of economic development, economic resilience becomes inclusive of three primary attributes: the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether. Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity. <http://www.eda.gov/ceds/content/economic-resilience.htm>

Human-made or natural disasters affecting the District may be short-term events such as forest fires and the resulting floods, or long-term situations such as drought and climate change. The recent national recession is an example of an economic disaster that is affecting the District as shown by declining population, labor force, jobs, and wealth. Primary effects of these events are disruptions to the base regional economy, community and natural environment.

Pre-Disaster Preparedness

State and Local Plans

- 1) State of Florida Emergency Operations Plan
- 2) Local Emergency Operations Plan
- 3) County Emergency Managers

SWFRPC works with and encourages its member communities to implement the following disaster assistance strategies:

- Engage in disaster preparedness and mitigation planning;
- Assess the community's risks and vulnerabilities;
- Inventory and organize local community recovery resources;
- Engage in operations continuity planning;
- Ensure resources are available for the elderly and those with special needs;
- Identify shelters;
- Identify recovery partners and the type of assistance and resources they can provide;
- Identify what recovery activities will take place immediately, short-term, intermediate, and long-term;
- Develop and disseminate a community evacuation plan;
- Establish a communication chain; and
- Engage the community. Take advantage of opportunities to communicate the process and protocols to follow in the event of a disaster and what recovery efforts will be undertaken.

Post-Disaster Planning and Implementation

Typically when a disaster event occurs, local officials, state emergency management personnel, and FEMA personnel will conduct a damage assessment to determine what damages and costs have been incurred due to a disaster event. FEMA personnel will use the collected damage information to make a disaster eligibility recommendation to the President of United States as to whether or not a Presidential Disaster Declaration should be declared. Insurance companies will also send out claims representatives and personnel to assess and determine insured private losses as well.

In the event of a natural or man-made disaster event occurring in the region, SWFRPC, when requested, will be available to assist counties, communities as well as coordinate with state, federal, and other agencies to:

- Develop and/or implement a recovery timeline;
- Implement a recovery plan (long-term recovery);
- Utilize a post-disaster window of opportunity;
- Prioritize redevelopment focus;
- Assist with historic preservation and restoration;
- Reduce disaster vulnerability through land use and development regulations;

- Address post-disaster redevelopment planning for various types of infrastructure and public facilities; and
- Assist communities with improved and alternate projects.

CEDS Goals and Objectives - Building the Pillars - Resiliency

1. Talent Supply & Education

Goal 1.3: Enhance the quality and quantity of Southwest Florida workforce.

- a. SWOT Finding: Southwest Florida's demographics suggest future workforce availability is a concern.

Trend Analysis: The age distribution of Southwest Florida's population is generally older than the U.S., presenting a potential challenge for future workforce availability. Only one county in the SWFL region (Hendry) has a median age lower than the national population. Median age in Southwest Florida's other counties ranges from eight to twenty years older than U.S. median. The early-mid career population (age 25-44) in SWFL is 19.7% of the region's total population, compared to 26.3% for the U.S. population. In 1999, Southwest Florida's age 25-44 cohort accounted for 25.3% of the region's total population. Southwest Florida's age 25-44 population has shown signs of growth lately, but still remains below where it was before the 2008 recession.

SMART Goal #1: Achieve average annual population growth rate of at least 2.0% (1990s level) in the age 25-44 cohort between 2022 and 2027.

SMART Goal #2: Achieve average annual labor force growth rate of at least 3.0% during 2022 and 2027 (historical average leading up to 2008 recession was 3.4%).

- b. SWOT Finding: Areas of the Southwest Florida suffer high unemployment which undermines workforce competitiveness in some parts of the region.

Trend Analysis: There are over 30,000 unemployed people in Southwest Florida (May 2017). While the region's overall unemployment rate of 3.9% is comparable to state and U.S. rates, it varies considerably within the region. Three counties in Southwest Florida have unemployment rates that are above state and national levels, including Hendry (6.6%), Glades (4.9%), and Charlotte (4.4%). Re-employment through education and skill development would provide a significant

boost to labor availability in Southwest Florida.

SMART Goal #1: Every county in Southwest Florida will have an unemployment rate that is lower than the U.S. unemployment rate by 2035.

Objective 1.3.1: Assess transportation options that provide access to workforce housing in close proximity to employment centers. Convene housing, transportation, and economic development providers to elevate current needs and future opportunities.

Objective 1.3.2: Create new employment centers in rural areas with high unemployment.

2. Innovation & Economic Development

Goal 2.5: Diversify the Southwest Florida Economy

- c. SWOT Finding: Southwest Florida economy is too reliant on Hospitality/Tourism.

Trend Analysis: Hospitality and Tourism is 19.9% of total traded cluster employment in Southwest Florida, compared to 11.4% for statewide economy. Historical average for Southwest Florida is 17.4% (1998-2013). The goal is for tourism to grow, but not as a share of total traded economy.

SMART Goal #1: Grow non-tourism export base at a rate fast enough to reduce share of Hospitality & Tourism from current 19.9% of total traded cluster employment in Southwest Florida to the region's historical average of 17.4% by 2035.

- d. SWOT Finding: Southwest Florida has a competitive advantage in Medical Devices.

Trend Analysis: Employment in the Medical Devices cluster has nearly tripled in SWFL since 2007, growing from 474 jobs to more than 1,400 jobs. During that time Southwest Florida has increased its share of total state employment in the Medical Devices cluster from three percent to nine percent. While that pace of growth in Southwest Florida is unlikely to be sustainable, the Southwest Florida Region should strive for job growth in Medical Devices at a fast enough pace to continue diversifying the regional economy, reducing reliance on tourism and construction.

SMART Goal #2: Achieve average annual employment growth of five percent in the Medical Devices cluster between 2022 and 2027.

Objective 2.5.1: Create a Medical Devices cluster intermediary organization.

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