

ECONOMIC DEVELOPMENT STRATEGIC PLAN

2022

Prepared for:
TALLAHASSEE-LEON COUNTY
OFFICE OF ECONOMIC VITALITY

315 S. Calhoun St. #110
Tallahassee, Florida 32301
oevforbusiness.org

Prepared by:
VISIONFIRST ADVISORS
6/1/2022



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Introduction

The creation of OEV was spurred by changes in the local economic development landscape from 2014-2016. Recognizing the need to invest in and cultivate this evolving landscape, the County and City Commissions approved becoming only the second community in the State of Florida to include economic development as part of their sales tax initiative.

Understanding the enormity of the opportunity for transformational change created by the sales tax, and to support, sustain and propel the community's collective economic development efforts, a new model was required. Thus, VisionFirst Advisors was retained to create a strategic plan to guide the newly-formed OEV's business development, entrepreneurship, and vitality initiatives. Since that time, the office has grown and fostered increased capital investment and job creation in Tallahassee-Leon County.

Even through a global pandemic that threw markets and supply chains into disarray, OEV has made significant progress in its efforts. As of the development of this report, it had initiated or completed 87 percent of the initiatives in its first strategic plan.



OEV has made significant progress since its inception:

- 2,972 jobs created through project announcements such as Danfoss Turbocor and Amazon
- 313 minority, women, and small business enterprises certified with more than 2,000 employees
- \$300 million in economic impact generated to the local economy
- \$18 million+ in Leon CARES funding disbursed to 930+ businesses

In the middle of this implementation, the state and the nation began grappling with the COVID-19 pandemic. As federal funds were deployed to states and counties, OEV disbursed more than \$18 million in Leon CARES funding to more than 930 businesses, underscoring the office's value not only to the city and county but also to the overall community.

Tallahassee-Leon County is known as a crossroads of state government and education, but there continue to be opportunities to recruit and support a variety of clean industrial and commercial growth. OEV was created both to support existing business and to encourage new industry, with the overarching goal of establishing the community as an ideal place for business, creating economic prosperity for residents.

In the past five years, OEV has been a catalyst for private sector job creation. Most recently, OEV announced the continued expansion of Danfoss Turbocor, as well as the successful recruitment of an Amazon fulfillment center, the largest private sector job project in the community's history. OEV has also certified more than 300 minority, women, and small business enterprises with more than 2,000 employees.

Now, it is time to review, re-evaluate, and reimagine Tallahassee-Leon County's initiatives in conjunction with the newly adopted county and city strategic plans. **Progress is a process.** The successes OEV has experienced over the last five years must be examined and analyzed, and that information must then be used to identify future opportunities for achievement with a singular focus.

A combination of new ideas with the proven methodology of stakeholder input and data led to this new strategic plan. Fine-tuned to Tallahassee-Leon County's needs, this plan evaluates how to attain continued progress and build resiliency in the face of future economic disruptions. In addition, this updated plan incorporates the recently adopted Leon County Five Year Strategic Plan and the City of Tallahassee Strategic Plan.

VisionFirst Advisors was founded in Tallahassee, and many on our team call it home. This partnership with OEV is more than just a project. It's personal. Tallahassee is a growing and thriving community, and it has so much more in store.

We are honored to continue our partnership with OEV to create the next strategic plan—and keep Tallahassee moving forward.

Sincerely,



Gray Swoope
President & CEO, VisionFirst Advisors

Project Overview

VisionFirst Advisors developed OEV's first strategic plan by gathering data and trends, seeking stakeholder input from a variety of sources, and providing context to the analytics.

OEV advanced the implementation of key policy and program initiatives by the IA Board in the Strategic Work Plan, with a major emphasis on jobs, MWSBE, and local business support. Those ongoing items (approximately 40%) from OEV's previous strategic work plan (2016-2021) will be incorporated into the new strategic work plan to help sustain those efforts already underway by OEV.

These activities will be incorporated into an updated work plan with the new strategies and tactics for a holistic and comprehensive effort. It is important to note, that this strategic plan recommends a new suite of focused, mission-critical strategies to build on OEV's foundational efforts.

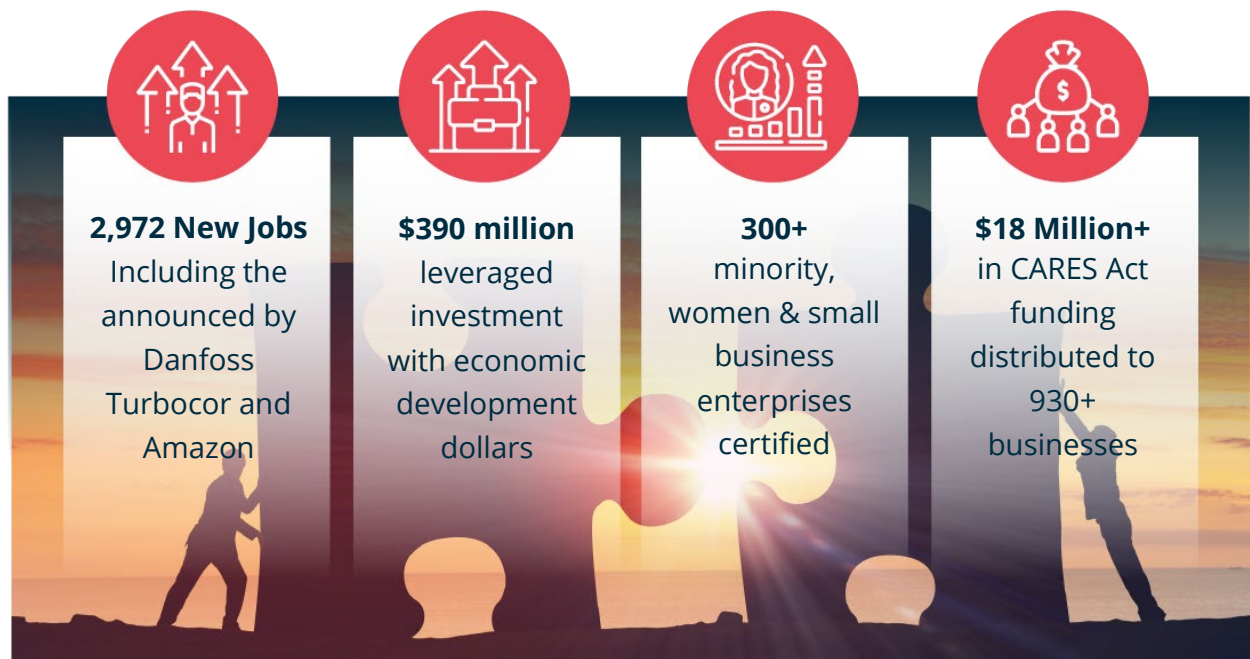
With a new plan comes a new approach—one that considers the successes and challenges OEV has experienced over the past five years. To identify objectives and organize them into a new strategic plan, VisionFirst took a holistic approach in assessing where Tallahassee was five years ago, where it is now, and what the future should look like. The project approach included:

- gathering feedback through conversations with numerous community leaders, business leaders, and staff regarding OEV's economic development efforts and suggestions for moving forward;
- analyzing data trends and projections regarding growth, gaps, and opportunities as compared to the region, state, and nation, while also examining data changes before and as a result of the pandemic;
- identifying any challenges or struggles that OEV has experienced in its economic development efforts;
- assessing target industries, incentive structure, and assets (tangible and intangible) over the past five years to identify new opportunities; and
- developing an updated suite of strategies and tactics for the city and county to use for increased economic prosperity moving forward.

Based on interviews, desktop analysis, and VisionFirst's knowledge of Tallahassee-Leon County and OEV, the following pages provide a new strategic plan that builds on the foundational activities of the original to further diversify the economy through the support and location of businesses large and small.

Executive Summary

Five years ago, Tallahassee-Leon County's newly-formed Office of Economic Vitality (OEV) retained VisionFirst Advisors to create a strategic plan to guide the office's business development, entrepreneurship, and vitality initiatives. Since that time, the office has grown and fostered increased capital investment and job creation in Tallahassee-Leon County. As of the development of this report, it had **initiated or completed 87 percent of the strategies and tactics in its first strategic plan**. OEV has made significant progress since its inception:



A NEW APPROACH

With a new plan comes a new approach—one that considers the successes and challenges OEV has experienced over the past five years. To identify objectives and organize them into a new strategic plan, the project approach included:



IN YOUR WORDS

VisionFirst hosted more than 60 stakeholder meetings with more than 100 elected officials, existing business leaders, small businesses, and community members. Stakeholder input was also gathered through an online survey. Taken by more than 150 key stakeholders including business leaders, elected representatives, education providers, and other influential leaders and organizations in the community.

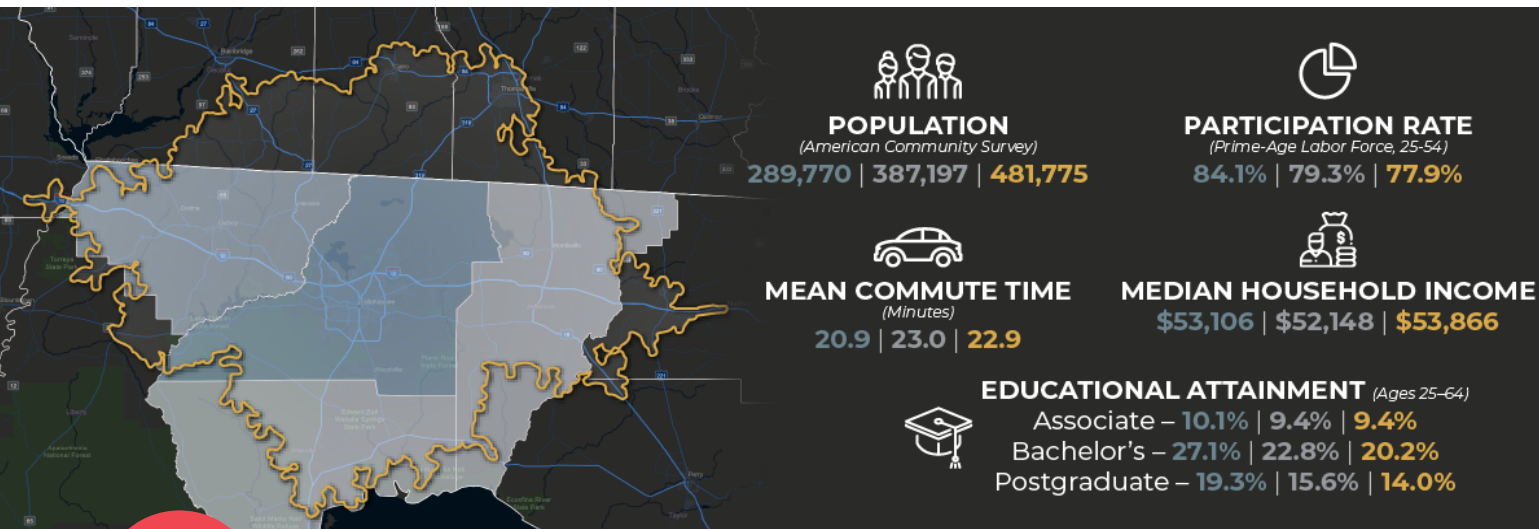


- OEV should set the vision for economic development
- Stakeholders would like to see a diverse industry sector that leverages assets such as the MagLab, universities, and existing industry (including Manufacturing), a stronger entrepreneurial climate, and more resources and support for existing industry in targeted sectors.
- Priorities for the MWSBE division include building a qualified workforce through training, apprenticeships, and business retention.
- The top three advantages are access to research and development in higher education, low operating costs, and state tax policies.



USING DATA TO TELL A STORY

To identify the best and most achievable economic development strategies, VisionFirst Advisors conducted research summarizing the local economy. While this plan focuses on Tallahassee-Leon County, site selectors and business decision-makers do not regard county lines. As Tallahassee-Leon County aims to be a regional leader for job creation and position itself to be competitive for economic development projects, the data included reflects the **county, metropolitan statistical area (MSA), and a forty-five-minute drive time surrounding Tallahassee-Leon County.**



Public Administration is Leon County's largest industry sector (29,712 workers)

Followed by Health Care & Social Services (21,606) and Educational Services (17,546)

TOP 10 OCCUPATIONS BY JOB OPENINGS

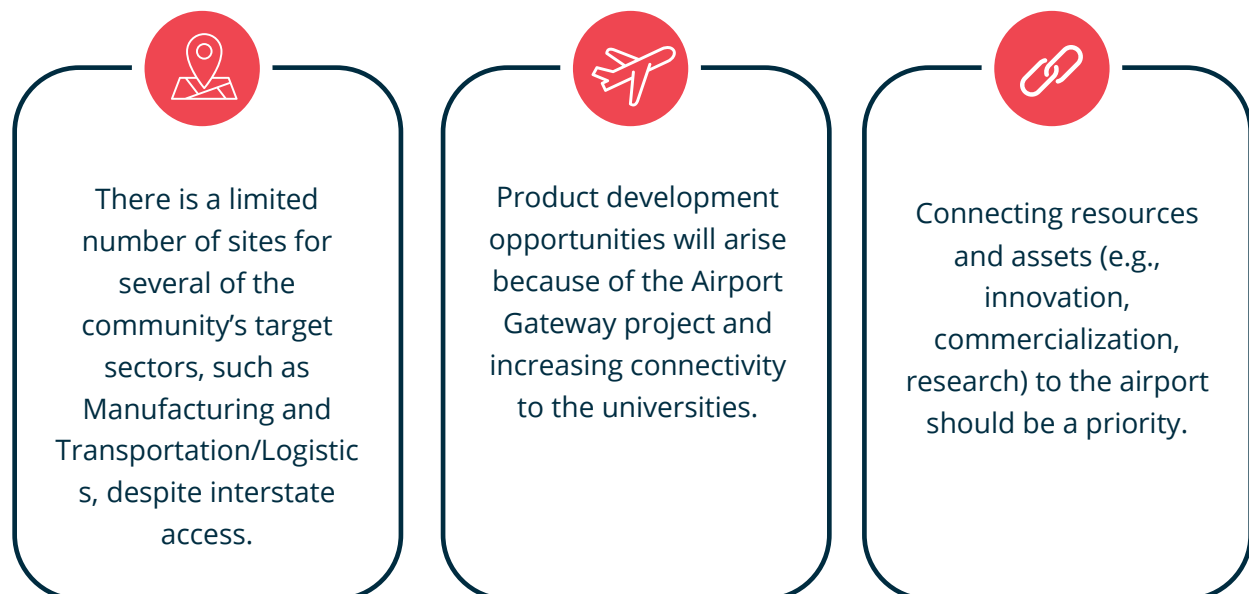
SOC	Occupation	Total Ads
41-2031.00	Retail Salespersons	512
29-1141.00	Registered Nurses	359
13-2011.00	Accountants and Auditors	347
41-1011.00	First-Line Supervisors of Retail Sales Workers	346
43-4051.00	Customer Service Representatives	251
15-1252.00	Software Developers	236
43-6014.00	Secretaries, Administrative Assistants, Except Legal, Medical & Executive	234
15-1232.00	Computer User Support Specialists	230
21-1093.00	Social and Human Service Assistants	229
35-3023.00	Fast Food and Counter Workers	229

The standard Occupational Classification system ([SOC](#)) is used to classify workers into occupational categories.

OPTIMIZING PRODUCT

A critical component of economic development success is offering competitive products—specifically in the form of developed sites and buildings that can house new, relocating, or expanding businesses.

The review of Tallahassee’s sites and buildings uncovered several key takeaways:





A Pathway Forward

In determining what should be OEV's primary focus over the next five years, VisionFirst considered both the support and the demands placed on the organization that fall within and outside of its purview. This plan offers strategies that are meant to give the organization an unerring focus on business recruitment, retention, and expansion as well as on building the project pipeline through marketing and communications efforts.

The plan incorporates the recently adopted Leon County Five Year Strategic Plan and the City of Tallahassee Strategic Plan. In addition, the work plan developed by OEV includes the supporting key objectives and initiatives of the County and City plans as they relate to their respective economic development priorities.

Finally, the new recommendations in this plan are meant to complement the ongoing work which accounts for approximately 40 percent of current activities. These activities will be incorporated into an updated work plan with the new strategies and tactics for a holistic and comprehensive effort.

Using facts and trends drawn from the data as well as economic development best practices, a group of four core strategies and two enabling strategies were identified.

- **Core strategies** are those that fall directly under the purview of OEV. They are vital for the organization to achieve its mission and improve the economic vitality of the community.
- **Enabling strategies** are those in which OEV may partner with other organizations or entities to facilitate or advocate for change. Enabling strategies are designed to support the core strategies by providing the resources and infrastructure required to achieve success in the organization's objectives.

Within each strategy is a series of tactics that provide an approach to implementation, which will be incorporated into a work plan. The tactics are segmented into one of three actions: implement, facilitate, or advocate.

- **Implement** – OEV to undertake, coordinate, and implement directly.
- **Facilitate** – OEV to work in conjunction with partners to develop and implement.
- **Advocate** – OEV to advocate to city, county, regional, and state leaders to undertake and/or implement.

The following timeframes are used throughout the plan:

- *Short-Term* – Three months to one year
- *Mid-Term* – One year to three years
- *Long-Term* – Three years to five years

STRATEGIES & TACTICS

Core Strategy: Maximize OEV's Impact

- Tactic: Ensure OEV's activities are singularly aligned with the core mission and strategic plan. *(Implement, Short-Term)*
- Tactic: Position OEV staff as the economic development leaders within the community and region. *(Implement, Short-Term)*
- Tactic: Facilitate a culture of creating a seamless customer experience for economic development clients. *(Implement, Ongoing)*
- Tactic: Serve as an advocate for workforce alignment. *(Facilitate, Short-Term)*

Core Strategy: Serve as an Advocate for Workforce Alignment

- Tactic: Support Adult Learners in Higher Education *(Advocate, Mid-Term)*
- Tactic: Host Annual Regional Education & Industry Roundtables *(Implement, Mid-Term)*

Core Strategy: Drive Business Recruitment, Retention, & Expansion

- Tactic: Develop value propositions for target industries. *(Implement, Mid-Term)*
- Tactic: Recognize existing industry. *(Implement, Short-Term)*
- Tactic: Expand the impact of the Tallahassee-Leon County business narrative. *(Implement, Mid-Term)*
- Tactic: Leverage university partnerships and assets. *(Implement, Mid-Term)*
- Tactic: Expand and strengthen regional economic development relationships to leverage recruitment and expansion efforts. *(Implement, Mid-Term)*

Core Strategy: Enhance the Incentive Toolbox

- Tactic: Adopt and implement a tiered incentive structure for traditional location or expanding industries. *(Implement, Mid-Term)*
- Tactic: Adopt and implement an existing industries incentive strategy. *(Implement, Mid-Term)*
- Tactic: Assist land owners in the development of existing and new sites and infrastructure. *(Implement, Ongoing)*
- Tactic: Foster an entrepreneurs grant program. *(Implement, Long-Term)*

Core Strategy: Support the development and retention of Minority, Women, and Small Business Enterprises

- Tactic: Provide sustainable professional development and instruction on supplier-diversity and inclusion for local stakeholders in our business system. *(Implement, Mid-term)*
- Tactic: Develop a business diversity fellowship initiative in conjunction with the local chambers of commerce. *(Advocate, Mid-Term)*
- Tactic: Develop an initiative that connects anchor institutions with minority- and women-owned providers for purchasing. *(Facilitate, Mid-Term)*
- Tactic: Support an increase in financing and lending to minority- and women-owned businesses. *(Facilitate, Mid-Term)*

Core Strategy: Foster Entrepreneurship & Business Formation

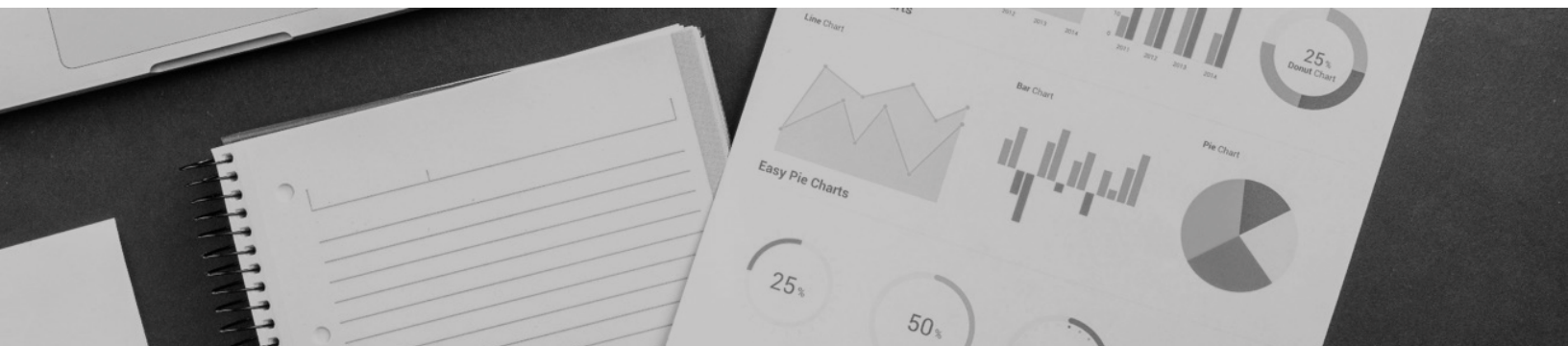
- Tactic: Accelerate and advance collaboration with FSU and FAMU Research Institutions. *(Facilitate, Mid-Term)*
- Tactic: Advocate and promote the investments in Innovation Park and the North Florida Innovation Labs to foster entrepreneurial growth. *(Advocate, Mid-Term)*
- Tactic: Survey entrepreneurs and stakeholders to better understand local needs. *(Facilitate, Mid-Term)*
- Tactic: Include entrepreneurship programs and resources on the OEV website. *(Implement, Short-Term)*

Enabling Strategy: Enhance Utilization of Assets

- Tactic: Continue to promote the MagLab as a unique asset for competitive economic development projects. *(Implement, Ongoing)*
- Tactic: Promote the assets of FAMU, a premier HBCU. *(Implement, Short-Term)*
- Tactic: Expedite the connector road from TLH to Innovation Park to the universities and the city center. *(Advocate, Short-Term)*
- Tactic: Support increasing the Tallahassee International Airport's economic impact on the region. *(Facilitate & Implement, Short-Term)*

Enabling Strategy: Increase Marketing & Communications Efforts

- Tactic: Deploy a suite of outreach tactics that support business development goals. *(Implement, Ongoing)*
- Tactic: Improve website and online presence to enhance communication with external, out-of-market audiences. *(Implement, Ongoing)*
- Tactic: Enhance technology to highlight assets. *(Implement, Mid-term)*
- Tactic: Expand the Tallahassee-Leon County business narrative in outside markets through strategic messaging. *(Implement, Ongoing)*



Core & Enabling Strategies

- Core: **Maximize OEV's Impact**
- Core: **Serve as an Advocate for Workforce Alignment**
- Core: **Drive Business Recruitment, Retention, and Expansion**
- Core: **Enhance the Incentive Toolbox**
- Core: **Support the Development and Retention of Minority, Women, and Small Business Enterprises**
- Core: **Foster Entrepreneurship and Business Formation**
- Enabling: **Enhance Utilization of Assets**
- Enabling: **Increase Marketing and Communications Efforts**



Strategies & Tactics

To develop the goals, strategies, and tactics, VisionFirst reviewed OEV's economic development activities to assess effectiveness in aligning assets, talent, and resources to be competitive for jobs and investment. In determining what should be OEV's primary focus over the next five years, VisionFirst considered both the support and the demands placed on the organization that fall within and outside of its purview.

As compared to the original plan, this one offers strategies that are meant to give the organization an unerring focus on business recruitment, retention, and expansion as well as on building the project pipeline through marketing and communications efforts. The suggested strategies and tactics are also meant to incorporate both the county and city strategic plans as it relates to their respective economic development priorities. Using facts and trends drawn from the data as well as economic development best practices, a group of four core strategies and two enabling strategies were identified.

- **Core strategies are those that fall directly under the purview of OEV.** They are vital for the organization to achieve its mission and improve the economic vitality of the community.
- **Enabling strategies are those in which OEV may partner with other organizations or entities to facilitate or advocate for change.** Enabling strategies are designed to support the core strategies by providing the resources and infrastructure required to achieve success in the organization's objectives.

Within each strategy is a series of tactics that provide an approach to implementation. The number of tactics is fewer than in the original plan, with the intention of each one generating a greater, more immediate impact, in conjunction with the implementation of the work plan developed by OEV with key actions and metrics. In addition, with an understanding of the scope of OEV's responsibilities, the tactics are segmented into one of three actions: implement, facilitate, or advocate.

IMPLEMENT – OEV to undertake, coordinate, and implement directly.

FACILITATE – OEV to work in conjunction with partners to develop and implement.

ADVOCATE – OEV to advocate to city, county, regional, and state leaders to undertake and/or implement.

The following timeframes are used throughout the plan:

- **Short-Term** – Three months to one year
- **Mid-Term** – One year to three years
- **Long-Term** – Three years to five years



Core Strategy: Maximize OEV's Impact

Five years ago, the Office of Economic Vitality (OEV) was formed, along with a dedicated funding stream for operations and competitive project incentives. Tallahassee-Leon County has long prided itself on building government organizations with opportunities for public input, accountability, and transparency.

Given the high priority placed on stakeholder input, the first strategic plan included the observations of more than 1,100 people, collected via interviews and surveys. This was a critical component of not only developing the plan but also ensuring that OEV understood the current climate.

Using that input, along with best practices and data, the plan defined economic development for Tallahassee-Leon County as:

A coordinated course of action across all local assets and resources to facilitate the development, attraction, and cultivation of innovative businesses and associated job creation to position the economy for sustained, directed growth, raising the quality of living for the citizens of Tallahassee-Leon County.

The definition includes a clear emphasis on coordination in economic development. Since it was developed, OEV has continually engaged internal stakeholders in all aspects of its endeavors and initiatives.

That plan and the definition set a baseline for OEV. The strategic plan and the targeted industry study were developed to serve as a program of work and a guide on which to base policy and funding decisions, respectively.

When considering programs, projects, or initiatives, there needs to be a clear consideration of economic development, community development, and tourism development. While there will be spillover benefits, OEV funding and programming should be clearly aligned with full-time, private sector job creation, retention, and sustainability, increasing the community's average wage, and increasing revenue generation in the local economy.

With that in mind, it is time to refine OEV's efforts to place a singular focus on external/out-of-market outreach and business development. A focus on out-of-market communities such as Atlanta, Miami, Chicago and high-priced to increase the project pipeline and create possibilities for additional private sector job creation and capital investment. The announcement of the Amazon fulfillment center and the continued expansion of Danfoss Turbocor, combined with the shifting dynamics of site selection due to the pandemic, both places urgency on and reveals opportunities for OEV.

Continued outreach, dialogue, and coordination with internal audiences is also necessary or imperative. There must be a balance that prioritizes what OEV was designed to do:

diversify the economy, create new private sector jobs, and increase capital investment, which generates needed local revenue.

Tactic: Ensure OEV's activities are singularly aligned with the core mission and strategic plan. *(Implement, Short-Term)*

The challenge facing every EDO is the fact that “economic development” means different things to different people. Nearly any business activity can be placed under the umbrella of economic development. In a perfect world, OEV would have the budget and capacity to be all things to all people.

High-performing economic development organizations are composed of individuals with specialized expertise and complementary skills who are goal-oriented and hyper-focused on achieving clear, outstanding results tied to growing the economy and providing opportunities to residents. They collaborate with stakeholders and innovate to achieve measurable results at the highest levels.

According to the International Economic Development Council¹, high-performing EDOs share eight success factors:

1. Are driven by their customer
2. Operate within a strong strategic plan.
3. Measure results and adjust accordingly.
4. Are creative risk-takers.
5. Build strong alliances and networks.
6. Earn the trust and respect of their communities.
7. Are efficient with funding and resources.
8. Invest in their people.

With administration, business recruitment and retention, entrepreneurship, and marketing comprising the core of the organization's mission, the goal should be to increase the focus on these areas. Creating a shared sense of purpose to the needs of Tallahassee-Leon County, OEV should strive to achieve a 75 percent / 25 percent balance of working on mission critical activities. To accomplish this, **staff should implement an internal matrix of criteria that guides the focus in every situation and for every action.**

At their most basic, the criteria should revolve around job creation, retention, and sustainability. The question that must be asked in every scenario that will require organizational capacity is simple: “Does this action lead to the creation, retention, and sustainability of a job for residents?”

¹ IEDC: High Performing Economic Development Organizations

If the action does not lead to a job creation opportunity, then it needs to be considered as a low priority on the activity list. A low priority item means the item is not OEV's core function, and effort should only be expended on it to redirect it to a more appropriate organization or entity for execution.

While the creation of jobs is the overarching focus, multiple facets of the jobs category must be considered. In developing the internal decision matrix around these facets, several questions should be considered, such as:

- Does the time devoted to the activity have a chance of leading to the creation of new full-time, private sector jobs?
- Does the time devoted to the activity have a chance of leading to the retention and sustainability of full-time, private sector jobs?
- Does the time devoted to the activity coincide with a wage that offers opportunity to residents at a variety of levels?
- Does the time devoted to the activity coincide with the creation of new jobs in a targeted (non-market-driven) industry?
- Does the time devoted to the activity coincide with the ability to provide residents with increased training and/or education?

While every answer to each of these questions will not be absolute, this process will help in beginning to identify whether the activity leads to the execution of the core mission of the organization: creating jobs.

Tactic: Position OEV staff as the economic development leaders within the community and region. *(Implement, Short-Term)*

One of the challenges with public-led economic development is the ability to differentiate ongoing community and political issues from the day-to-day functions of the EDO. The director of OEV should be viewed as a strategic, prominent community leader similar to the CEO of the chambers of commerce and other nonprofit organizations that support local community and economic development initiatives.

Through the Blueprint Intergovernmental Agency, both the strategic plan and the performance metrics are discussed, reviewed, and approved. Strategic plan activities should be emphasized and prioritized; deviating from that focus leaves little ability for sustained progress.

One of the concerns communicated by stakeholders representing the business community during our interview process was that it is perceived that staff does not have the same level of authority as similar positions within the community. Simply put, the director must be seen as the authority on economic development in the community. Based on this, OEV

needs to be able to continue to provide unfiltered direction on its economic development initiatives.

An example of a successful government-only EDO is Pinellas County Economic Development. While its structure is public, its new and previous directors were viewed as regional leaders on economic development, meeting independently with other leadership on matters critical to collaborative success. To reach a new level of success over the next five years, the same must be true for the director of OEV.

Currently, most of the reporting, communication, and internal audience marketing responsibilities fall to the director. **More responsibility should be granted to the other positions** – and there is significant talent within the leadership levels of OEV. With two deputy director positions over business development and MWSBE, there is opportunity for those leadership roles to share in the responsibility of outward-facing communications to internal audiences. If all three leadership positions within the organization are viewed as leaders within the community and the region, they become interchangeable in the eyes of stakeholders, building capacity and redundancy in operations. This allows the director to spend more time on external outreach to target out-of-county markets. The added capacity will provide more opportunities for relationship-driven lead and opportunity generation.

Tactic: Facilitate a culture of creating a seamless customer experience for economic development clients. (*Facilitate, Ongoing*)

Critical to the recognition of OEV's role as an advocate for business development is the ability to foster a customer-focused experience with businesses and clients to support both city and county government. While process and systematic approaches are recognized as efficient, they often lack the level of attention and understanding that differentiates the community from its competitors.

These clients and representative site selection consultants typically contact the local EDO to conduct due diligence before initial introductions. The experience as well as the information presented must be coordinated through the economic development professionals at OEV, who work on these issues daily. OEV has built a strong reputation with site selection consultants and stakeholders around the country for its facilitation of interaction and information. By working with key partners, such as Innovation Park and the Tallahassee International Airport, OEV should lead the customer experience for economic development clients and facilitate how community assets are shown and presented to prospects and potential clients.

Core Strategy: Serve as an Advocate for Workforce Alignment

Creating economic competitiveness, vitality and vibrancy in a community is now largely dependent on the quality of its workforce. Economic development organizations can no longer rely solely on sites and location – talent is a key driver of recruitment and expansion efforts. However, economic development organizations such as OEV cannot “own” the issue of workforce. They are facilitators and advocates. Tallahassee-Leon County and the region at large have a strong network of organizations that should be a part of holistic solutions and individual programs and initiatives. The goal for OEV is to align the efforts with target industries, support existing businesses, and provide support and advocate for programs and funding.

Tactic: Support Adult Learners in Higher Education *(Advocate, Mid-Term)*

The pandemic opened the door for many workers to reconsider their career pathways. The state and federal government created programs to grant nontraditional college students access to low- or no-cost higher education programs. But the higher education system does not always align with the needs of a working adult with financial and family commitments. The American Institutes for Research analysis of “adult promise” programs, which included statewide and institution-based offerings, found numerous requirements that conflicted with the needs of many adult students.

Adults may have jobs, child care concerns, questions about past credits, loan defaults in their credit history, or anxiety about returning to school, [according to Laura Perna](#), executive director of the Alliance for Higher Education and Democracy at the University of Pennsylvania. “There is a complexity to adult learners,” said Perna. “Programs to serve them must consider finances, schedules, and supports”—everything that needs to be done to make it possible for them to attend.

In Leon County, nearly 26,000 people have some college experience but no degree. While OEV does not directly oversee workforce development, to facilitate the creation of new, higher-paying private sector jobs, there must be a ready, well-trained workforce as well as educational institutions that are creating a pipeline of workers who can meet the needs of business. OEV currently works closely with the Talent Development Council (comprised of the Tallahassee Chamber, CareerSource Capital Region, Tallahassee Community College, and Lively Technical College) to advocate for that clear workforce alignment which is imperative to creating a strong pipeline of workers.

Local higher education institutions should implement best practices that support adult learners, such as:

- Supportive services, including child care and transportation
- Professional networks and peer support

- Course time flexibility
- Financial aid and support offices with nontraditional hours so students with full-time jobs can receive assistance
- A course in which students create a portfolio of prior experience that allows them to earn credits to apply to their degree
- Adult education recruiters who attend college fairs to reach parents that attend the fairs with their high schoolers

A Brookings report advises:

Instead of focusing on the skills gap . . . it's time to focus on closing the opportunity gap—not only for the benefit of individuals who have been shut out of the labor market, but for society as a whole. Cultivating and investing in diverse talent can unleash regional innovation, economic growth, and community well-being.

Figure 1 presents the most common training programs for adult learners nationally. Only registered nurses earn a higher-than-average annual wage in Leon County. Closing the opportunity gap goes beyond earning a certificate. Students and potential students must understand the wages and long-term employability associated with their choices.

Communities tend to rely on databases that show job openings, programming, and wages, to find pathways to success. Without exposure to career possibilities and professional networks, however, students may default to the most well-known programs. Inclusive partnerships between OEV, target industries, and education providers will provide long-term solutions to solving the skills and opportunity gaps.

FIGURE 1: MOST COMMON TRAINING PROGRAMS AMONG WIOA ADULT PROGRAM PARTICIPANTS

Occupation of Training	Number of Exiters	Percent	Median Wage (Annual Equivalent)
Heavy and Tractor-Trailer Truck Drivers	27,178	14.8%	\$34,289
Nursing Assistants	16,182	8.8%	\$20,002
Registered Nurses	11,844	6.5%	\$53,627
Licensed Practical Nurses	10,612	5.8%	\$35,392
Medical Assistants	6,998	3.8%	\$23,261
Medical Records and Health Information	2,510	1.4%	\$24,996
Electricians	2,340	1.3%	\$37,252
Computer User Support Specialists	2,190	1.2%	\$29,392
Dental Assistants	2,137	1.2%	\$21,120
Security Guards	2,074	1.1%	\$21,806

Source: U.S. Department of Labor, WIOA Participant Individual Record Layout (PIRL) Data, Program Year 2018, Quarter 3. Occupations are given at the SOC code level. Median earnings are expressed as the estimated annual wage equivalent, calculated using quarterly earnings in the second quarter following program exit. Exiters include individuals who exited the program between PY 2016 and PY 2018 who are still tracked in PY 2018 Q3 data. Note: 21.1 percent of exiters who participate in Registered Nurse training were in one state (Florida).

Tactic: Host Annual Regional Education & Industry Roundtables *(Implement, Mid-Term)*

While the data offered in the plan presents a snapshot of current workforce dynamics, only through ongoing dialogue can a more accurate, comprehensive picture be presented. As noted earlier, a host of agencies and organizations engage in workforce programming on the local level. It is critical to collaborate and not duplicate efforts.

Organize strategy sessions between CareerSource, K-12 and post-secondary institutions, and industry partners to devise a plan on how to work together to increase talent availability, retention and skill development. The roundtables should collaborate with employers, educators, and job training programs to offer an information exchange and build relationships to ensure students are receiving the education and relevant training that will prepare them to be successful in industries in the community. Key metrics and timelines should be identified during the discussion.

Core Strategy: Drive Business Recruitment, Retention, & Expansion

In fall 2016, the newly-formed OEV began developing a plan of work based on several initiatives outlined in the original strategic plan. The overarching focus was on a strong business retention and expansion program. The mission was simple: to ensure local employers benefited from a favorable business climate, and as they grew and expanded, to further diversify the local economy with new industry.

Five years later, it is clear that OEV has developed a robust program. From constant outreach and engagement to problem-solving and advocacy, the staff at OEV has devoted considerable time and effort to ensuring improvement of the business climate. Although challenges remain, the progress has been substantial.

While business recruitment was an original focus, many of the actions necessary to achieve positive results in a proactive outreach program were reliant on building the foundation of that existing outreach platform. In the last five years, OEV has laid the groundwork for each program to work together to provide transformative change.

Today, business recruitment, retention, and expansion (BRR&E) cannot be viewed as discrete initiatives. None will thrive without the others. Strong existing outreach and advocacy strengthens the message of a positive business climate to prospective new industries. The recruitment of new business diversifies the existing talent pipeline and expands opportunities for residents. BRR&E must be one of the focuses of the OEV team moving forward. Fortunately, the program of work and the processes that have been implemented enable the staff to be proactive in their outreach both to existing industry and externally to out-of-market decision-makers and potential new business. Therefore, it is recommended a combined core strategy to continue to drive business recruitment, retention, and expansion for Tallahassee-Leon County.

To realize transformative growth, priority must be given to this type of outreach. The team should utilize the decision matrix in order to examine the percentage of its time that is devoted to core mission activities. Enabling the OEV team to focus on mission-critical priorities positions the organization for continued success. OEV will be able to narrow its focus to a few key areas to ensure the competitiveness of the region and create opportunities for residents – as noted previously, a key tactic is to ensure that a majority of the OEV's staff time is dedicated to mission critical initiatives that create, retain, and sustain jobs.

There are four primary strategies OEV should consider to reach these goals. These strategies will help expand on the progress the OEV team has achieved and help realize transformational growth.

Focus on opportunities for every citizen of Leon County

While higher wages and increased payroll should be the goal of any community's economic development strategy, it can be done without sacrificing opportunities for the most disadvantaged portion of the workforce. Flexibility throughout the economic development process that allows for the creation of jobs that offer upward mobility is critical.

Continue to focus on expanding existing business and educating regarding the importance of doing so

OEV has made great strides in outreach and engagement with local industry. Subsequent expansions and the buzz around the changing business climate in the region speak to that effort. The public as well as most leadership, however, still place more value on the recruitment of new business rather than on the expansion of an existing one. Changing this narrative should continue to be a focus of the OEV team. Supporting the expansion, retention and sustainability of current companies is important as they tend to drive the private sector job growth within the community.

Burnish and expand the Tallahassee business reputation

Prior to the creation of OEV, Tallahassee-Leon County was seen merely as a capital and university town with little interest in business recruitment or private sector job growth. The area was known for difficulty in permitting, with no strong voice of business. Given the area's perceived aversion to new growth and/or industrial projects, site selectors and companies have historically been hesitant about opportunities in Tallahassee-Leon County.

This narrative is changing. The recent announcement by Amazon, the continued expansion of Danfoss Turbocor, and additional attention paid to a revised incentive structure and ready sites have improved the community's profile and raised the opportunity for these projects. In addition, OEV has built a strong reputation with site selection consultants and stakeholders around the country for its facilitation of interaction and information. The immediate challenge is that the new narrative that Tallahassee-Leon County is open for business needs to be clearly and constantly communicated to external, out-of-market decision-makers in targeted industries. Investing the time and money to carry this message to those industry insiders is paramount moving forward.

Leverage university partnerships and assets

One of the many assets the region enjoys is a wealth of higher education institutions with attractions far beyond the classroom. Since the first strategic plan, OEV has increased the community's profile by highlighting university research capacity and endeavors, including the significant efforts in promoting the MagLab to national and international businesses. Leveraging university partnerships offers a perfect setting to highlight community and regional assets to both internal and external, out-of-market audiences as well as the potential for company to harness a diverse talent pool.

THE IMPORTANCE OF JOBS AT ALL LEVELS

As the EDO for Tallahassee-Leon County, it is OEV's responsibility to be the lead in the attraction, retention, and expansion of new and existing businesses. Historically, communities have measured economic development success using a critical marker: increases in the average annual wage. Higher average wages, however, are generally earned by those with additional education and training. It is important to raise the wages of the collective community, rather than just one segment.

In addition to targeting projects that can take advantage of the community's high educational attainment and considering [research suggests](#) 49 percent of Leon County is below the ALICE threshold, Tallahassee-Leon County should consider projects that offer pathways out of poverty. Projects like the recently announced Amazon fulfillment center offer competitive wages plus benefits on day one of work for people without higher education. Strategies for lowering the poverty rate often include providing additional training, but training can also take place on the job, providing both market wages and a career pathway.

Figure 2 presents annually-released unemployment data from the U.S. Census Bureau, which breaks the data down further than the Bureau of Labor Statistics. While not updated on a monthly basis, it does offer data that is critical to OEV and its recruitment efforts. The data falls along the lines of national trends, especially around educational attainment levels.

FIGURE 2: UNEMPLOYMENT DATA FROM THE BUREAU OF LABOR STATISTICS (2019)

AGE	Unemployment Estimate
25 to 29 years	4.4%
30 to 34 years	2.6%
35 to 44 years	4.6%
45 to 54 years	2.3%
55 to 59 years	6.2%
60 to 64 years	3.5%
RACE	
White alone	6.0%
Black or African American alone	9.2%
Hispanic or Latino origin (of any race)	8.5%
White alone, not Hispanic or Latino	5.7%
GENDER	
Male	6.5%
Female	5.2%
POVERTY STATUS IN THE PAST TWELVE MONTHS	
Below poverty level	21.8%

At or above the poverty level	2.6%
EDUCATIONAL ATTAINMENT	
Less than high school graduate	10.4%
High school graduate (includes equivalency)	6.9%
Some college or associate degree	2.6%
Bachelor's degree or higher	2.8%

Because of the impacts of COVID-19 on data collection, the US Census Bureau did not release its standard 2020 ACS one-year estimates.

The information in Figure 2 indicates clear needs for additional employment opportunities for those in poverty, those with less than an associate degree, and people of color.

Combine this information with the impacts of the pandemic on the workforce and there is a need for a business recruitment, retention, and expansion strategy that recognizes private sector job creation in a variety of industries and across all wage levels. Sectors such as Manufacturing and Logistics & Distribution can drive economic growth within the community and offer the potential to deliver well-paying jobs to some of the most under-resourced residents.

These four primary strategies focus on the importance of jobs at all levels will help expand on the progress the OEV team has achieved. The tactics listed below serve to guide OEV's progress within BRR&E core strategy.

Tactic: Develop value propositions for target industries *(Implement, Mid-Term)*

The pandemic has made one thing clear: Where companies do business matters. A recent survey by Chief Executive Magazine shows that 44 percent of CEOs are now more open to examining new locations for their business than they were prior to the pandemic. More than one-third of CEOs are considering shifting to or opening significant operations in a new state.

A recent [Area Development article](#) noted:

Countless companies nationwide have already announced major decisions to relocate as they reassess everything from business costs, skyrocketing taxes and regulations that will impact their talent attraction and retention. The quality of life in states like Texas and Florida and the ease of doing business there effectively gives employees an immediate 11 percent to 13 percent pay increase because they will not be paying California or New York State and New York City taxes.

The prospects of a diverse talent pool, lower corporate and personal taxes, a cheaper cost of living and lifestyle benefits in these two states are driving more executives to look south.

Given this shift, Tallahassee-Leon County needs to position itself as a place that understands industry drivers and will be a long-term partner in a business's success. Not every industry has the same set of project drivers. For some, speed to market may be the driving factor, for others it might be the use of renewable energy and the mitigation of interruptions from natural disasters, and for others it might be a steady pipeline of skilled workers.

OEV must create customized outreach, incentive packages, sites, and a workforce demonstration for each target industries to communicate the drivers of each.

Within the Powering Florida resource center, created by Florida Power & Light to help increase the state's competitiveness, is the Location Factor Industry Standard. Figures 3–5, which are based on that standard, provide a graphical representation of the relative weighted importance of each location factor within this sector. The list of industry sectors and weighted location factors were developed by economic development consultants and are based on broad experience and the analysis of hundreds of projects.

Figures 3-5 make it clear that every industry and every project has disparate drivers. Customizing responses, packages, and marketing to meet these drivers' best positions Tallahassee-Leon County for success.

FIGURE 3: CORPORATE, SUBSIDIARY, AND REGIONAL MANAGING OFFICES (NAICS 551114)

Companies in the Corporate, Subsidiary, and Regional Managing Offices sector include establishments (except government establishments) primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise. These establishments normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. Establishments in this industry may hold the securities of the company or enterprise.

Factor	Characteristics	Percentage
Workforce	<ul style="list-style-type: none"> Available workforce with business and administrative skills Proximity to four-year college offering degrees in business and technology areas Presence of community or technical college with programs in information technology, office/administrative, and computer fields 	25%
Office Space	<ul style="list-style-type: none"> Available Class A office space 	25%
Cost of Doing Business	<ul style="list-style-type: none"> Facility cost Tax burden (state and local) Utilities Wages 	15%
Logistics	<ul style="list-style-type: none"> Access to comprehensive commercial air transportation 	15%

Telco Infrastructure	<ul style="list-style-type: none"> • Sophisticated telecommunications infrastructure: <ul style="list-style-type: none"> ○ Redundancy ○ Multiple points of presence ○ Trunk lines ○ National carriers 	10%
Quality of Life/Place	<ul style="list-style-type: none"> • Low cost of living (index below 100) • Overall ranking of community's public-school districts of B or higher according to Florida school grades • Availability of various types of housing • Access to recreational and cultural amenities 	5%
Financial Incentives	<ul style="list-style-type: none"> • State incentives • Local match • Other local incentives 	5%

FIGURE 4: MANAGEMENT, SCIENTIFIC, AND TECHNICAL CONSULTING SERVICES (NAICS 5416)

Companies in the Management, Scientific, and Technical Consulting Services sector provide advice and assistance in areas related to logistics and supply chain management. Examples of services include planning, implementing, and controlling the movement and storage of raw materials, in-process inventory management, quality control, distribution networks, warehouse operations, and related information from the point of origin to the point of consumption.

Factor	Characteristics	Percentage
Workforce	<ul style="list-style-type: none"> • Available and affordable workforce with technical skills • Average hourly wage at or below industry average based on EMSI data • Proximity to four-year college offering degrees in computer science, IT, and mathematics • Presence of community or technical college with programs in IT and computer fields 	30%
Infrastructure	<ul style="list-style-type: none"> • Transportation industry presence and infrastructure: <ul style="list-style-type: none"> ○ Interstate/controlled four-lane access ○ Railroad mainline and shortline access ○ Navigable waterways ○ Commercial airport with cargo services ○ Concentration of transportation companies and distribution facilities 	30%
Telco Infrastructure	<ul style="list-style-type: none"> • Sophisticated telecommunications infrastructure: <ul style="list-style-type: none"> ○ Redundancy ○ Multiple points of presence ○ Trunk lines ○ National carriers 	20%
Cost of Doing Business	<ul style="list-style-type: none"> • Rental/facility cost • Tax burden (state and local) • Utilities cost • Wages cost 	10%

Quality of Life/Place	<ul style="list-style-type: none"> • Low cost of living (index below 100) • Overall ranking of community's public-school districts of B or higher according to Florida school grades report • Availability of various types of housing • Access to recreational and cultural amenities 	5%
Financial Incentives	<ul style="list-style-type: none"> • State incentives • Local match • Other local incentives 	5%

FIGURE 5: WAREHOUSING AND STORAGE (NAICS 493)

Companies in the Warehousing and Storage sector are primarily engaged in operating warehousing and storage facilities for general merchandise, refrigerated goods, and other warehouse products. These establishments provide facilities to store goods. They do not sell the goods they handle. They may also provide a range of services, often referred to as logistics services, related to the distribution of goods. Logistics services can include labeling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing, and transportation arrangement. Establishments in this industry group always provide warehousing and storage services in addition to any logistics services. Furthermore, the warehousing or storage of goods must be more than incidental to the performance of services, such as price marking.

Factor	Characteristics	Percentage
Logistics Infrastructure	<ul style="list-style-type: none"> • Multimodal transportation infrastructure: <ul style="list-style-type: none"> ○ Interstate / controlled four-lane access ○ Roads in good condition with recent repairs/upgrades ○ Limited highway congestion ○ Mainline and shortline rail access ○ Navigable waterways ○ Commercial airport with cargo facilities 	40%
Workforce	<ul style="list-style-type: none"> • Available and affordable • Average hourly wage at or below industry average based on EMSI data • Presence of community or technical college offering transportation-related courses • Customized programs available to train workers • Distribution/logistics programs at university / technical college (within sixty miles) 	30%
Sites & Buildings	<ul style="list-style-type: none"> • Available sites and buildings 	10%
Market Proximity	<ul style="list-style-type: none"> • Proximity to customers or suppliers 	10%
Cost of Doing Business	<ul style="list-style-type: none"> • Cost of doing business: <ul style="list-style-type: none"> ○ Rental/facility cost ○ Tax burden (state and local) ○ Utilities cost ○ Wages cost 	5%

Financial Incentives	<ul style="list-style-type: none"> • State incentives • Local match • Other local incentives 	5%
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Tactic: Recognize existing industry *(Implement, Short-Term)*

The success of companies like Danfoss Turbocor and DivvyUp highlights the focus on existing industry that the OEV team has made a priority. Existing companies are encouraged at OEV's engagement and outreach. They can point to positive steps in advocacy that are providing real results for their company in Tallahassee-Leon County. Further, the proactive outreach program is providing significant business intelligence regarding the challenges that remain in the current business climate and the opportunities that exist moving forward. As discussed, this has paved the way to long-term business recruitment success.

Even with all the success the program has enjoyed, the overall opinion of many stakeholders is that there is more to be done to bring in new business. Even when presented with concrete examples, the sentiment remains that efforts have not yet yielded significant progress. The challenging aspect to this is that this was not an isolated opinion, but somewhat prevalent. There is a fundamental underestimation of the importance and impact that existing industry expansions have on a community and the surrounding region.

This challenge is not unique to Tallahassee-Leon County. The recruitment of new business naturally brings natural excitement and energy. New industry locations create a palpable buzz, many times being used by elected officials and the media to form a distinct narrative. That leads to the perception that new business locations have a greater impact than expansions by existing business.

While diversifying the economy with new business and industry should always be a focus, its impact typically lags the impact of the expansion of a current business on the region for several reasons. In general, most new job growth is created by existing industry. In terms of tax contributions, the expansion of business in an existing location has a greater economic impact over time. Finally, considering that existing businesses deciding to expand sends a positive message to industry circles regarding the region, OEV must utilize these "wins" on a level commensurate with new business announcements to showcase a thriving business community. A strong business retention and expansion program also serves the dual purpose of educating existing businesses about the OEV's economic development efforts and can provide leading insights into emerging issues for existing businesses, which can result in new initiatives to address them preemptively.

The example of Danfoss Turbocor is one with which most stakeholders share some familiarity. The magnetic technologies company has expanded multiple times. The

construction of the newest facility promises to triple its current manufacturing capacity and create an additional 200 jobs. The impact of this expansion cannot be undervalued.

OEV should consider commissioning an economic impact analysis of Danfoss Turbocor's location and expansion as a driver of the magnetic ecosystem. The analysis should go beyond a traditional ROI model and consider indirect impacts such as corporate citizenship, long-term tax collection, partnerships realized, and anecdotal information regarding employees. This impact alone will push the narrative of the importance of existing industry expansions.

Tactic: Expand the impact of the Tallahassee-Leon County business narrative
(Implement, Mid-Term)

Across the state, the Tallahassee-Leon County business reputation has improved and expanded considerably. In the past, the region was viewed as a capital city focused on the public sector. Over the last five years, that perception has begun to shift. In conjunction with the expansions of Danfoss Turbocor and the location of Amazon, OEV has slowly been changing that narrative. Relationships with state partners such as Enterprise Florida, Inc., the Department of Economic Opportunity, and CareerSource have flourished, which has translated into more opportunities.

Even with the progress that has been made within the state, externally – in outside markets - there is still a lack of understanding that Tallahassee-Leon County is a favorable business destination. It is crucial to focus on strategic business development effort that highlight the changing business climate of the region. External outreach to decision-makers around the country must become a priority. Consider specific outreach in key markets such as Atlanta, Miami, Chicago, the northeast and high-priced metros.

The key to an out-of-market outreach plan is ensuring the approach is focused on the current targets. OEV has determined four target industry clusters:

- Applied Sciences & Innovation
- Manufacturing & Transportation/Logistics
- Professional Services & Technology
- Health Care

These clusters focus on those industry targets that best represent the current capacity to compete as well as their desirability from an impact standpoint. The targets and their correlating drivers, however, are highly varied. With limited staff and resources, OEV must develop a way to be efficient in its outreach. The approach to introducing the Tallahassee-Leon County region must be efficient and focused.

There are many possible approaches to getting the message to the intended audiences. From in-market missions to industry-specific conferences to direct outreach to consultants,

there are myriad paths OEV should consider. There also needs to be consideration of the return of all these efforts. Marketing the region for business is not an inexpensive proposition.

There is no substitute for direct, in-person contact with decision-makers. From attending sector-specific conferences such as the CED Life Science Conference or the Logistics Development Forum to corporate real estate and site selector events, these investments ensure the OEV story is heard. In addition, digital outreach to decision-makers can be a powerful, less-expensive tool. Digital shorts concerning assets in the region or positive news stories can make a positive impression on site selectors.

OEV should develop an outreach plan with an associated budget and assigned team members, decide which events will be attended specific to each sector, identify the decision-makers that focus on those industries, and work to educate them in-person or virtually regarding the benefits of a Tallahassee-Leon County location.

Tactic: Leverage university partnerships and assets *(Implement, Mid-Term)*

Working with the research departments of both university foundations, OEV should collaborate to identify alumni and corporations with growing or expanding businesses who might consider Tallahassee-Leon County. Once a list is developed, those prospects should be invited to outreach events and activities that would enable both the institution and OEV to discuss the benefits of locating in the community. **OEV should leverage university partnerships and assets for business development prospecting and project pipeline growth.** OEV could sponsor an event or site tour to enable the prospect to see the growth and potential sites in the community.

Tactic: Expand and strengthen regional economic development relationships to leverage recruitment and expansion efforts *(Implement, Short-Term)*

Economic regionalism involves talking about the region from a labor market perspective and then promoting the diversity of the different communities within the region. Thinking regionally provides OEV and the surrounding communities with the opportunity to aggregate assets that may fall outside their strict jurisdictional boundaries.

An example of this effort is the recently launched Big Bend Manufacturing Association (BBMA), powered by the OEV, which extends across ten communities throughout North Florida. In partnership with FloridaMakes, OEV is able to leverage existing staff expertise to provide the Big Bend region with a regional cooperative centered on manufacturing. The goal is to provide much-needed assistance to area organizations helping them to grow and capitalize on new market and strengthen Florida's high-wage manufacturing sector.

While, OEV has established relationships with neighboring economic development organizations, which is a competitive advantage, these relationships should be expanded and strengthen. Joint projects, when possible, should be an aspirational goal. This aspirational goal is especially important due to the limited availability of sites and industrial land within Tallahassee-Leon County.

Core Strategy: Enhance the Incentive Toolbox

Incentives comprise both financial and nonfinancial instruments that are implemented based on their value proposition to the community. Therefore, a well-established understanding of a community's expectations and vision for the future is vital when developing and adopting a successful incentive policy.

During the community interviews conducted by VisionFirst, one consistent message was that increasing the average wage for **all residents** should be a primary goal. Other incentive thoughts were directed at traditional economic development or were specific to entrepreneurship and small businesses.

OEV is fortunate to have a dedicated funding source due to the Blueprint 2020 sales tax initiative. Currently, OEV utilizes the Target Business Program to incent businesses that locate in designated target areas for economic growth and development; that build environmentally sensitive projects; that do business with other local businesses; and that practice good corporate citizenship all while ensuring a sound return on investment to the public.

Funds awarded under this program may be used to reimburse (1) 100% of the cost of development fees and (2) a portion of the capital investment of the business project based on ad valorem taxes paid. The amount of funding is based on a scoring system.

For incentives, one size doesn't fit all. Good economic development policy indicates that incentives should be commensurate with the value of the project to the community. A tiered incentive strategy allows OEV to provide basic incentives to all qualifying locations and expansions but limits the abatement of taxes and grant of discretionary funds to projects that specifically address the economic development goals of the community. It also allows the OEV team to focus their time on projects that are within the established targeted industries and provide wages that improve socioeconomic challenges.

To ensure future funding is used in a manner that supports job creation, retention, and sustainability (i.e., mission critical activities) and significant return on investment, VisionFirst suggests an incentives matrix for new and expanding industries and a separate program to assist entrepreneurs and startups, which is reflected in the tactics on the following pages.

EXAMPLE OF INCENTIVE TIER

	Tier 1	Tier 2	Tier 3	Existing Private Sector Industry	Entrepreneurs
Type of Project	Transformative Target Industry	Competitive & in Target Industry	Not in a Target Industry		Start-Up Non-market driven industry
Jobs	• 100+	• 10+	• 10+	• 25+ or 20% of Existing Workforce	
Wage	• 125% of Average Wage	• 115% of Average Wage	• Less than 115% of Average Wage		
Capital Investment	• \$50+ million			• \$1+ million	
Assistance	• Customize Financial Incentive Package could include: grants to offset costs, infrastructure assistance, land, etc.	• No Financial Incentives	• No Financial Incentives		• \$1k grant
	• Tax Rebates Based on Matrix	• Tax Rebates Based on Matrix	• No Tax Rebates	• 80% Tax Rebate for up to 3 years	• \$5k grant if additional financing is secured
	• Workforce Development Grant Up to \$5k per job	• Workforce Development Grant Up to \$5k per job	• Workforce Assistance	• Up to \$1k per job retained	
	• Permitting Assistance	• Permitting Assistance	• Permitting Assistance	• Permitting Assistance	
	• Research	• Research	• Research	• Research	• Research

Adopt and implement a tiered incentive structure for traditional location or expanding industries *(Implement, Mid-Term)*

Responses during interviews varied widely. Some stakeholders feel that it is important to recruit new private sector businesses that will bring new investment and jobs to the Tallahassee area. Others are protective of the existing ecosystem and are concerned about development changing the culture of the area and reducing greenspace.

VisionFirst understands the importance of maintaining the culture and quality of place within the community while also strategically incentivizing companies looking to expand or locate in Tallahassee-Leon County that will create meaningful jobs with living wages. To that end, a tiered approach to incentives is proposed, utilizing an incentives matrix to determine the property tax reimbursements and enabling OEV to determine incentives in a consistent, judicious manner.

First, it is important to define what qualifies as an industrial project. Industrial projects typically have some flexibility as to where they can locate. They may have geographic areas in mind or may be limited on sites based on infrastructure needs; but because of their

customer base, industrial projects are typically not tied to a location. This varies from retail projects, because retail locates based on number of housetops and average household income. Good economic policy rarely incentivizes retail, and if it does, it is done through tools such as tax increment financing (TIF) or limited property tax rebates.

It is also important to acknowledge that projects may come from industries new to the area or from existing industries that are considering significant additional jobs and/or capital investment. Whether the industry is new or existing, the project should be evaluated to determine whether incentives are justified and at what level they should be awarded.

As shown in the table above, **the proposed tier structure enables OEV to be supportive of all industries and sets minimum employment and investment thresholds for qualifying for incentives.**

Adopt and implement an existing industries incentive strategy (*Implement, Mid-Term*)

While recruiting new industries and assisting with expansion is undeniably a primary goal of OEV, it is also important to remember the value of existing industry. The most effective method of championing existing industry is maintaining open communications and relationships with each industry's management. This is typically accomplished through corporate visitation programs and existing industry events. Each contact point lets OEV staff gain information on how the facility is doing, identify current workforce issues, and can serve as an early notice of potential expansions or layoffs.

Much like there is a proposed incentive strategy for new and expanding businesses, there should also be a strategy for assisting existing industry in specific situations.

- **Instances where the company is making a significant capital investment without the creation of new jobs** – For existing industries that are prepared to make a significant capital investment in their facility to improve productivity.
- **Instances where infrastructure or regulatory issues are jeopardizing the success of the industry** – Existing industries that are experiencing issues with utilities, permitting, transportation, or regulations often do not know where to go or how to address their concerns. Much like the services provided for permitting, OEV must be prepared to help the industries identify a pathway to success. Depending on the nature of the issue and the impact of the problem, OEV may recommend to the board that some form of assistance be provided or sought to correct the problem.
- **Instances where workforce issues are identified by the existing industry** – If companies are struggling with workforce, the OEV team should identify the challenges and help address the issue by providing wage and benefit data and by acting as the

company's champion with workforce training providers to develop a solution approach that addresses the current issue as well as establishes a pipeline for future needs.

- **Instances where the industry is at risk for closure or significant layoffs –**

Occasionally, a company will encounter a situation in which they are at risk of significant layoffs (suggested: the greater of twenty-five workers or more than 20 percent of workforce) or closure. In these instances, if the company can identify a solution strategy that will prevent layoffs, OEV could consider creating a retention grant that must be used for retention and must be repaid if individuals are let go within twelve months of receipt of the grant. Each company should only be eligible for the retention grant once. In instances where layoffs or closure cannot be avoided, OEV should work with the human resources department and the local employment service to ensure that all displaced workers are assisted as quickly as possible.

Tactic: Assist land owners in the development of existing and new sites and infrastructure *(Implement, Ongoing)*

The incentives listed above all address awards that will “move the needle” when Tallahassee-Leon County is being considered for a potential project. To get to that point, the assumption is made that sites are available with appropriate zoning and existing infrastructure. If such sites do not exist, in addition to providing the incentives suggested above, OEV must also be prepared to assist with developing the sites and deploying necessary public infrastructure to serve the needs of the proposed facility in a timely manner.

Tactic: Foster an entrepreneurs grant program *(Implement, Long-Term)*

Startup industries can invigorate a community and its workforce and create real economic transformation. The creativity startups require to be successful is difficult to define or identify, primarily because there are so many members of the workforce striving to become successful entrepreneurs. The key is to build a pathway to success, which includes preparedness and evaluation prior to investment. As part of a long-term tactic, OEV should consider fostering an entrepreneurial grant program, whether it is one created specifically by OEV (example below) or through partnering with existing grant programs such as Innovation Park's TechGrant program.

For purposes of the OEV specific entrepreneurial program, it is important to understand the difference between a small business and a startup. By definition, a small business is a business entity created to operate at a profit on a small scale; bakeries, auto repair shops, and apparel boutiques are all examples of small businesses. Startups are legal entities created to usher a disruptive idea from concept to a repeatable and scalable good or service. Entrepreneurial startups have tremendous economic potential.

Entrepreneurial startups have many of the same needs: access to capital, assistance with development, mentorship, and physical space. **For innovation startups, should OEV wish to establish a new grant program, they could work directly with Florida State University (FSU), Florida A&M University (FAMU), and Tallahassee Community College (TCC) to map out and provide mentorship, technical assistance, and space to succeed, as well as a small entrepreneur grant program.**

As an example for a proposed new grant program, a potential entrepreneur would submit a business concept paper and give a ten-minute pitch to the Alliance of Entrepreneur Resource Organization (AERO). If the group sees merit in the concept, the entrepreneur could qualify for a \$1,000 grant to assist with business plan development, product development, prototyping and testing, and further refinement of the project to get it to the point that it qualifies for venture capital. Each positively-evaluated project could also receive a grant to defray the costs of a space at Domi or another coworking or incubator space. **OEV should work with FSU, FAMU, TCC, local foundations, and state venture capital funds to develop a network to assist these startups in identifying venture capital opportunities.** For example, the Michigan State University Foundation recently created a \$5 million venture investing subsidiary, [Red Cedar Ventures](#). This fund has both a pre-seed fund and an opportunity fund focused on helping Michigan State University-based startups and technologies overcome critical funding gaps, accelerate growth, and provide follow-on, growth-stage capital. Stanford's [Graduate School of Business Impact Fund](#) is designed to expose students to the process of "impact investing". The fund is an evergreen fund that invests in early-stage for-profit ventures seeking both financial and social and environmental returns. The new company could become eligible for an additional startup grant of up to \$5,000 upon receipt of proof of successful financing. The value of this grant would be allowed to be included in the total financing stack. The new business will also receive a one-year membership to the chamber of commerce of their choosing.

Or OEV could pursue partnerships with existing grant programs such as the Innovation Park's TechGrant program, which would build on a current program and could provide enhance opportunities to fund technology commercialization in targeted industries.

Core Strategy: Support the Development and Retention of Minority, Women, and Small Business Enterprises

Tallahassee-Leon County is fortunate to have the Blueprint program, which was designed to address infrastructure needs and preserve the area's quality of place. The projects undertaken since 1989 have not only improved infrastructure and amenities but have also connected the community and opened economic and job corridors. With improved connectivity comes the opportunity to foster entrepreneurship and business formation in many of those same locations—creating a more impactful outcome for the projects.

The pandemic led to a strong increase in business startups. According to analysis from [the Brookings Institute](#):

A new cohort of entrepreneurs is launching startups at a historic clip—a rarity during a recession. New business starts grew by 24 percent in 2020, driven mainly by an increase in non-store retail startups selling goods and services online. As workers and families find their economic footing, new business ownership could be a path to economic self-sufficiency, and early indications suggest the startup surge is disproportionately concentrated in Black and Latino or Hispanic neighborhoods.

OEV's Minority, Women, and Small Business Enterprise (MWSBE) programming has helped increase opportunities for these businesses by providing certification assistance to vendors looking to secure contracts with local government. The efforts have been effective: There are now more than 300 MWSBE-certified firms, a 73 percent increase since 2018. In addition, the County, City, and Blueprint have spent \$13.4 million on minority and women procurement activities over the last three years.

Given that OEV's efforts are concentrated in government contracts, however, the types of business the office can assist are limited.

Also from [the Brookings Institute](#):

Nearly a third of all Black firms in the U.S. are in health care and social assistance fields, and Black women own 54 percent of these businesses. In contrast, only 11 percent of non-Black firms are in the health care and social assistance fields. There are a number of economic and social reasons why Black businesses are concentrated in fields different than non-Black businesses—investment capital is one.

By understanding the diversity of the types and goals of minority- and women-owned businesses in the community, there is an opportunity for OEV to increase efforts not only by creating new programs but also by facilitating and creating partnerships that support minority- and women-owned businesses and entrepreneurs throughout the community.

In a recent engagement session with MIT's USA Lab, MWSBE stakeholders discussed both benefits and pain points to OEV's efforts. The feedback from that initiative provided insights that have been incorporated into the tactics suggested.

Tactic: Provide sustainable professional development and instruction on supplier diversity and inclusion for local stakeholders in our business ecosystem *(Implement, Mid-Term)*

Tallahassee-Leon County is often described as “resource rich” with tools for businesses development and creation. With partners like the FAMU Small Business Development Center, CareerSource, the Jim Moran Institute, the Tallahassee Chapter of the Association of Building Contractors, et al, the importance and impact of OEV's supplier diversity efforts must be embraced by all elements of our business ecosystem. The new strategic plan should continually inform the work of the MWSBE Division to not only engage, equip, educate and empower its certified MWSBEs, but also its business ecosystem partners to maximize the community's understanding of economic inclusion.

Tactic: Develop a business diversity fellowship initiative in conjunction with the local chambers of commerce *(Advocate, Mid-Term)*

One of the pain points noted in the MIT session was the perception that the Tallahassee-Leon County business environment is relationship-based and favors connections. Numerous organizations host networking events, but there is an opportunity for more meaningful interactions among leaders that would support minority and women entrepreneurs as well as individuals.

Tallahassee-Leon County is home to several chambers of commerce, including the Tallahassee Chamber of Commerce, the Big Bend Minority Chamber of Commerce, and the Capital City Chamber of Commerce—each with its own set of programming and events. Both Big Bend and Capital City focus on supporting minority-owned businesses. There is an opportunity, however, to support minority business owners and individuals alike. Consider a best practice by



[Greater St. Louis Inc.'s Business Diversity Initiative Fellows Experience](#), which is designed to address the interests and challenges minorities and women face as they work to advance their careers. This year-long program enhances each fellow's leadership capacity through professional development, relationship building, and civic engagement. **The three chambers, along with support from OEV's MWSBE program, could work together to develop this opportunity to support greater diversity and business connectivity within the community.**

Tactic: Develop an initiative that connects anchor institutions with minority- and women-owned providers for purchasing *(Facilitate, Mid-Term)*

The MWSBE program connects certified minority vendors to compete and win contracts with the City of Tallahassee, Leon County, and Blueprint, but this represents only a fraction of the potential local market. **OEV's MWSBE staff should coordinate with other anchor institutions such as FSU, FAMU, and TCC, along with hospitals, banks, and other large employers to connect them with vetted local businesses.**



While the criteria may be different for each institution, collaboration can increase local revenues and job creation efforts. Achieving success will require understanding purchasing procedures, building trust with the anchor institutions, and providing counseling to suppliers to win contracts. OEV should continue to refer MWSBEs to the FAMU Small Business Development Center (SBDC) for business counseling as part of the initiative and collaborate with local chambers of commerce to outline a path forward. Consider [Philadelphia's Anchors for Growth and Equity](#) as a model.

Tactic: Support an increase in financing and lending to minority- and women-owned businesses. *(Facilitate, Long-Term)*

The pandemic shut residents in and negatively impacted countless businesses. To provide relief to communities and support businesses, the federal government deployed billions of dollars to states and counties. Those funds came with a level of local flexibility. Tallahassee-Leon County, \$3 million was dispersed to the FAMU Federal Credit Union for microloans to

minority-, women-, and black-owned businesses through Leon CARES and ARPA funds. The County, City, and OEV served as the contract manager for the funding, which was meant as a stopgap to business closures during this financially difficult time. At the time of this report, the Credit Union had awarded 67 percent of the funds in support of twenty-four businesses. In addition, OEV partnered with the Regional Planning Council to leverage \$800,000 in federal funding and an additional \$200,000 in local funding for high-risk loans.

The need for loans to minority businesses was evident pre-pandemic as well. According to a report from [the Federal Reserve](#), "Compared with similar white-owned firms in terms of profitability, credit risk and other factors, black-owned businesses that applied for financing were 7 percent less likely to obtain credit overall, and they were 20 percent and 17 percent less likely to do so at large and small banks, respectively." The level of disparity in loan approvals underscores the need for and benefit of minority lending institutions like the FAMU Federal Credit Union. As additional federal funding is made available, Tallahassee-Leon County should continue its partnership with the credit union to expand banking and loans to targeted businesses. In addition, **OEV should promote the credit union's loan programs and efforts in its marketing and outreach.**

Core Strategy: Foster Entrepreneurship & Business Formation

A DESTINATION FOR ENTREPRENEURS

Entrepreneurs and startups have always been important drivers of an economy. According to the [Small Business Administration](#) (SBA), small businesses accounted for nearly 60 million jobs and employed 47 percent of all U.S. employees in the pre-pandemic economy.

According to 2019 U.S. Census data, 52 percent of Leon County businesses have fewer than five employees. Roughly one-quarter of those are in the Professional, Scientific, and Technical Services sector. And in 2020, more than 7,000 new business applications were received—up 81 percent from 2015.

FIGURE 6: LEON COUNTY BUSINESS PATTERNS

Employment Size of Establishments	Number of Establishments
All establishments	7,721
Establishments with less than 5 employees	4,072
Establishments with 5 to 9 employees	1,394
Establishments with 10 to 19 employees	1,032
Establishments with 20 to 49 employees	841
Establishments with 50 to 99 employees	247
Establishments with 100 to 249 employees	103
Establishments with 250 to 499 employees	28

Source: U.S. Census Bureau – All Sectors: County Business Patterns, 2019

In support of these business, the area has developed a host of entrepreneurship-focused resources and programs. The most well-known program is Domi Station, which is supported by OEV, Leon County, FSU, FAMU, the U.S. EDA and the SBA. In 2015, FSU launched the Jim Moran College of Entrepreneurship which is now ranked sixteenth nationally among undergraduate schools for entrepreneurship programs; nearly 1,000 students are enrolled in the college's undergraduate entrepreneurship program. FAMU was recently awarded a \$100,000 grant from Wells Fargo to launch a small business incubator to assist women- and minority-owned businesses.

Across Tallahassee-Leon County, entrepreneurship and business formation are celebrated and cultivated. The critical conversation is how to sustain and grow these businesses in a manner that diversifies the economy and adds full-time private sector jobs. OEV can convene and accelerate entrepreneurial support using its expertise and community outreach efforts.

Tactic: Accelerate and advance collaboration with FSU and FAMU Research Institutions *(Facilitate, Mid-Term)*

Tallahassee is home to a thriving research community anchored by world-class facilities, like the National High Magnetic Field Laboratory and High Performance Materials Institute, and business incubators, like Domi Station. The research conducted in Florida's Capital City is more than theoretical – products are going to market and high-wage jobs are being created every year.

Building on the success, best practices, and collaboration of the Magnetic Technologies Taskforce, the OEV should seek out future tactics for cluster development in biotechnology, energy, engineering, environmental studies, materials, medical, research tools and software. Increase focus of each of the clusters that has significant forward momentum provides a real opportunity for global leadership.

In addition, information on the leading research being conducted within the targeted industries should be included in the development of value propositions to highlight the intellectual capital and opportunity taking place in the community.

Tactic: Advocate and promote the investments in Innovation Park and the North Florida Innovation Labs to foster entrepreneurial growth *(Advocate, Mid-Term)*

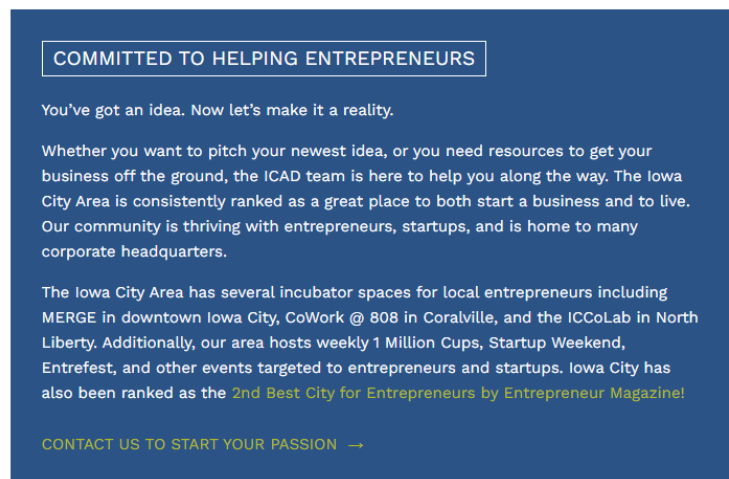
As home to the MagLab, Danfoss, the FAMU-FSU College of Engineering, Centers of Research Excellence, and the recently announced North Florida Innovation Labs, OEV must work to advocate and promote the investments in Innovation Park and the North Florida Innovation Labs to foster entrepreneurial growth. The Park's mission is to foster the startup, growth, and attraction of private companies that create high wage jobs and contribute to our region's innovation ecosystem.

This is especially important given the opening of the new incubator within the next three years, which will significantly increase the resources available to entrepreneurs and aid in the formation and expansion of technology businesses, disseminating technologies to existing businesses, and establishing new business operations throughout the region.

Tactic: Increase the promotion and elevate entrepreneurship programs and resources on the OEV website *(Implement, Short-Term)*

OEV's website currently focuses only on the MWSBE aspect of entrepreneurship and small business. While its programming is limited, through the previously-referenced proposed incentive opportunity and the plan for additional marketing, Tallahassee-Leon County can increase and better promote its conducive entrepreneurial environment and serve as a point-of-entry for entrepreneurs looking for local resources.

As a best practice, consider the Iowa City Area Development's (IACD) website. Similar to Tallahassee, Iowa City is a university town committed to retaining and fostering talent. The website highlights available resources, offers contact information, and highlights rising entrepreneurs. This collaborative marketing effort demonstrates partnerships and positions IACD as a convener and facilitator to entrepreneurs.



OEV should expand and increase the promotion of entrepreneurship resources and programs on the website. This expanded web content could include an interactive tool that guides prospective entrepreneurs to relevant partners and organizations that can offer support. Consider the [Michigan Economic Development Corporation](#) or [Invest Atlanta](#) as best practices.

Tactic: Survey entrepreneurs and stakeholders to better understand local needs. (Facilitate, Mid-Term)

The issue in Tallahassee-Leon County has not been a lack of entrepreneurship or small business support organizations, locations, or initiatives, but rather a lack of knowledge by community members as to where to start. Throughout the county and region, organizations are funding programs, hosting webinars and networking events and awarding grants and loans.

The success of these efforts must be measured holistically. Current and prospective entrepreneurs must understand the opportunities before them, and gaps in the community must be filled. In 2018, OEV and its partners surveyed entrepreneurs to better understand gaps in the system. The result was the launch of the Innovation Park incubator. Ongoing evaluation of the system as market dynamics change is critical.

OEV, along with AERO (Alliance of Entrepreneur Resource Organizations), should develop and deploy an entrepreneurship survey concerning the perception of the entrepreneurship business environment and resources as well as individual interest in entrepreneurship. The survey would help leverage and promote resources more holistically. Long-term partners could consider the development of a strategic plan that aligns efforts, minimizes overlap, and identifies needs for resources.

Enabling Strategy: Enhance Utilization of Assets

For communities to win competitive projects, the EDO must conduct significant due diligence on the front end. This includes not only developed sites, but also pre-planning how assets are utilized.

Some of Tallahassee-Leon County's most notable assets—FSU, FAMU, Innovation Park, the MagLab, and the airport—all lie in close proximity to each other. Dotted in that landscape are sites and buildings that can and should be marketed to prospects.

In the current environment, does that connectivity resonate with prospects and demonstrate advantages in relation to their project drivers? Given the speed with which project decisions are being made, as well as the use of online research to begin the site elimination process, OEV should position its assets more holistically and demonstrate their value as a collective.

Consider how the priorities for sites have changed, according to [Area Development](#):

While in the past site selection was motivated by budget dollars, this is no longer the case in many industries. In today's ever-changing climate, land and construction cost often take lower priority to speed to market, which makes locally driven site factors more critical. Today's industry leaders want to get to market as quickly as possible, addressing the particulars motivating their growth, and they are willing to spend more money to ensure speed to market. And, the norms are changing, as stakeholders are more concerned with the present, not ten years into the future."

TALLAHASSEE-LEON COUNTY COMPETITIVE ASSETS



ASSET: THE MAGLAB

The original strategic plan encouraged OEV to utilize the MagLab as a significant selling point to target industry sectors and startups. OEV has made great strides in promoting the MagLab to out-of-market partners, leveraging research opportunities, and building transformational partnerships. A snapshot of the success includes:

- **Magnetic Taskforce Creation:** OEV is using the thought leadership of a diverse group of stakeholders that includes industry, research, and educational leaders with the expertise to drive the local Magnetics industry forward. The task force's guidance in the Applied Science and Magnetics targeted sectors has provided direction to OEV in establishing collaborative research projects with many local laboratories, in addition to the potential for organizations to locate facilities within Tallahassee-Leon County.
- **Increased Business Development Activity:** OEV has grown the project pipeline, with more than 15 active projects in Manufacturing, research collaboration, Biotech, Magnetics, Logistics and Transportation, Aerospace and Vehicle Electrification, with businesses ranging from startups to Fortune 500 companies. Ten of these opportunities are the result of the partnership with Research On Investment (ROI), which has generated 1,200 leads (i.e., researching companies to develop a prospect list on that primed for expansion).
- **Expanded Marketing and Communications Strategies** – To promote both the Magnetics industry and other local organizations, OEV expanded the “ElectroMagnetic Bitter” campaign to emphasize the achievements of the MagLab. These included Deep Brewing, the Tallahassee Beer Society, DivvyUp, Target Print & Mail, and Full Press Apparel. In addition to promoting local companies, the proceeds from the beer sales provides funding for the MagLab's SciGirls and Camp Tesla STEM programs. As a result of this collaborative marketing strategy, OEV was presented with the 2021 Florida Economic Development Council's Innovation in Marketing Public-Private Partnership Award.

Tactic: Continue to promote the MagLab as a unique asset for competitive economic development projects *(Implement, Ongoing)*

Since 2016, there has been a clear, committed focus on marketing FSU's MagLab to private industry by a host of partners. **Earlier this year, FSU entered into a five-year agreement with MagCorp in Tallahassee that both parties say will strengthen relationships between the university and private industry.** MagCorp is working with experts at the MagLab to provide solutions for magnetically-enabled technologies in multiple business sectors, including Medical Technology, Textiles, Manufacturing, Consumer Products, and Defense.

OEV, through its partnership with ROI, has increased the project pipeline and generated leads. And, as noted throughout this plan, Danfoss Turbocor has once again expanded its facility. This strategic cluster focus around a unique asset must continue.

Winning projects from this type of outreach and marketing does not take place quickly; it often takes years to mature into winning a competitive economic development project. Positioning the MagLab as a research destination for public and private dollars in conjunction with the surrounding community assets will be critical as the community seeks to diversify the economy. **The efforts surrounding the MagLab are working, and OEV must continue its outreach and prospecting initiatives—the asset is unique and resonates with a host of businesses and industries.**

ASSET: FLORIDA A&M UNIVERSITY

Florida Agricultural and Mechanical University (FAMU) is a public historically black land-grant university in Tallahassee, Florida. Founded in 1887, it is the third largest historically black university in the United States by enrollment and the only public historically black university in Florida. Socially-conscious investors seek to finance businesses that are committed to environmental sustainability, social accountability, and transparent governance (ESG). Beyond ESG, shareholders also want to see corporations commit to diversity, equity, and inclusion (DEI) initiatives.

Tactic: Promote the assets of FAMU, a premier HBCU. (Implement, Short-Term)

The FAMU-FSU College of Engineering offers unique opportunities to attract companies committed to these efforts.

A [Brookings Institute article](#) notes the benefits of investing in communities with an HBCU:

Historically black colleges and universities aren't only great places for people to get an education; they provide a foundation for population growth and economic development. Even though tech companies admit they need to diversify their workforces, there is a narrative that small towns don't have the talent to fill positions. But consider those towns with HBCUs. Even though HBCUs make up just 3 percent of colleges and universities in the U.S., they account for 27 percent of African American students with bachelor's degrees in STEM fields, according to the U.S. Department of Education.

Figure 10 notes awards by FAMU in areas of study that align with OEV's target industries, using data from JobsEQ. The chart data represents nearly 500 awards out of the approximately 2,100 total awards conferred by the university. These numbers, along with the notable history of the university, indicate opportunities to prospective companies to diversify their workforce, form partnerships on new initiatives, and enhance the community's talent pipeline. **OEV should promote FAMU-FSU College of Engineering and**

the FAMU College of Science and Technology advantages to a company seeking skilled talent, an exceptional community, and increased diversity.

FIGURE 7: FAMU AWARDS IN TARGET INDUSTRY AREAS OF STUDY

CIP Code	Title	Associate	Bachelor's	Master's	Doctorate	Total Awards
52.0201	Business Administration and Management, General	0	135	61	0	196
26.0101	Biology/Biological Sciences, General	0	79	5	0	84
04.0201	Architecture	0	37	11	0	48
11.0101	Computer and Information Sciences, General	0	28	6	0	34
09.0902	Public Relations/Image Management	0	33	0	0	33
11.0103	Information Technology	0	26	0	0	26
50.0409	Graphic Design	0	21	0	0	21
14.0801	Civil Engineering, General	0	4	2	3	9
14.1001	Electrical and Electronics Engineering	0	3	5	1	9
14.0301	Agricultural Engineering	0	8	0	0	8
14.0701	Chemical Engineering	0	5	0	1	6
14.0901	Computer Engineering, General	0	6	0	0	6
14.3501	Industrial Engineering	0	4	1	1	6
14.1901	Mechanical Engineering	0	4	1	1	6
52.0203	Logistics, Materials, and Supply Chain Management	0	1	4	0	5
14.0501	Bioengineering and Biomedical Engineering	0	0	1	0	1

ASSET: CONNECTIVITY FROM TLH TO THE CITY CENTER

Blueprint has invested heavily in developing the areas from Cascades Park to Railroad Square and FAMU Way to North Lake Bradford Road. These investments have created synergy between Florida A&M University, Florida State University, and the City of Tallahassee—literally and figuratively removing boundaries between the universities and their communities. Investment in the corridor continues, with Blueprint providing matching funds for the new North Florida Innovation Labs wet lab space located in Innovation Park.

Tactic: Expedite the connector road from TLH to Innovation Park to the universities and the city center *(Advocate, Short-Term)*

Tallahassee-Leon County has a strong history and reputation for projects that elevate the community's quality of place and infrastructure improvements. A critical Blueprint project is the Airport Gateway, which would create a multimodal gateway entrance into downtown, FSU and FAMU from TLH. The project will enable expanded investment in southwest Tallahassee-Leon County, supporting local growth of the high-tech sector in areas such as Innovation Park and improving neighborhood safety.

By connecting the airport to downtown, new opportunities are opened to provide jobs to local citizens with a variety of skills. Access to new sites creates opportunities within Innovation Park that could be used for supporting additional research facilities as well as Advanced Manufacturing such as Danfoss Turbocor compressors. To understand the full scope of the potential project benefits, OEV should work with Blueprint to develop an economic impact assessment of the roadway, similar to the Northeast Gateway and Fairgrounds projects.

The community should consider the impacts from a similar project in Omaha. Abbott Drive is the easternmost link in Omaha's Park and Boulevard System that connects the eastern edge of Creighton University and north downtown Omaha to Eppley Airfield, through Carter Lake, Iowa, and to John J. Pershing Drive on the eastern end of Florence, Nebraska. Considered "Omaha's gateway", Abbott Drive changed the landscape of the city, relieved traffic congestion, and fostered business growth.

ASSET: TALLAHASSEE INTERNATIONAL AIRPORT (TLH)

Owned and operated by the City of Tallahassee, the Tallahassee International Airport (TLH) is one of the most-mentioned assets by stakeholders for increased economic opportunity. In 2014, a plan was developed to consider the best opportunities for cargo facilities, maintenance and repair operations (MROs), and other aviation-related businesses. The designation to become an international airport for cargo was attained in 2015. Approximately \$700,000 from the OEV budget is allocated to the airport annually. This funding supports the development of the international arrivals center which will enable the

creation of the Foreign Trade Zone and stimulate site development. The international arrivals center is set to break ground in 2022 and the City's ongoing investment in this key asset is reaping benefits poised for substantial future positive impacts.

Within the City of Tallahassee's strategic plan economic development goal is an objective to "increase the Tallahassee International Airport's economic impact on the region" through the following metrics:

- Dollar value of Tallahassee International Airport's economic impact. *Target: \$1 billion*
- Annual total passenger traffic (enplanements and deplanements). *Target: one million*
- Annual total cargo (enplaned and deplaned). *Target: 22 million pounds*
- Acres of land leased near Tallahassee International Airport. *Target: 100 acres*

Tactic: Support increasing the Tallahassee International Airport's economic impact on the region (*Facilitate & Advocate, Short-Term*)

The new OEV Strategic Plan incorporates the City's strategic plan related to the airport in full with the tactic to support the City's objectives for this primary asset. For OEV, it will be important for the Office to support TLH airport efforts to promote business development. Through a coordinated effort with the City, there is an opportunity to provide an untold competitive advantage for business and industry.

Increasing the positioning of how the airport and OEV can and does support a business locating at or near the airport will underscore the community's willingness to mitigate risk and support speed to market. OEV will support the airport's efforts to market sites and support business and industry development, inside and outside of the fence. It is critical for the airport to be properly marketed on the OEV website and linked to the airport's website to ensure consistency in messaging and the ability to capture a broad audience.

As the City places a priority on site development, OEV should work in support of those efforts to explore and maximize business development opportunities.

Enabling Strategy: Increase Marketing & Communications Efforts

Every day, Tallahassee-Leon County competes with thousands of regions across the nation and around the world for the deployment of capital in the traditional location or expansion of industry, the selection of the community for a new franchise business, an entrepreneur looking to develop a new product, or, in today's market, the relocation of a remote worker. How Tallahassee-Leon County tells its business story is crucial to the successful location of each of these business decision-makers.

The disruption from COVID has only increased the need for EDOs to be strategic in their communications and marketing efforts. Balancing both internal and external, out-of-market clients and customers, marketing and communications activities must be strategic, deliberate, innovative, consistent, and proactive.

Even before a site selector, corporate real estate agent, or business decision-maker reaches out to a community, a great deal of research has already been conducted online. Website searches, data downloads, and an incentive review have often already taken place. With that in mind, websites, digital advertising, and consistent messaging are important components to reaching target audiences in the right medium at the right time.

In developing a tactical marketing and communications strategy, it is critical to understand what target audiences want and how they get the information they are looking for in a location. A Development Counsellors International (DCI) 2020 report, *Winning Strategies in Economic Development Marketing*, asked corporate executives and location advisors about the most-effective strategies and techniques in economic development marketing.

Several findings regarding how Tallahassee-Leon County markets itself are worth noting:

- Since 1996, dialogue with industry peers has been the top source of information about a location, followed by business travel and articles in newspapers and magazines.
- Since 2014, an internet/website presence has been rated as the most effective marketing technique, followed by planned visits to corporate executives, media relations/publicity, and hosting special events.
- 80 percent of respondents used the internet during their last site-selection search, and 77 percent reported a strong likelihood that they would visit an EDO's website during their next site search.
- Location advisors said staff contact information and incentive information are the most useful features of an EDO's website.

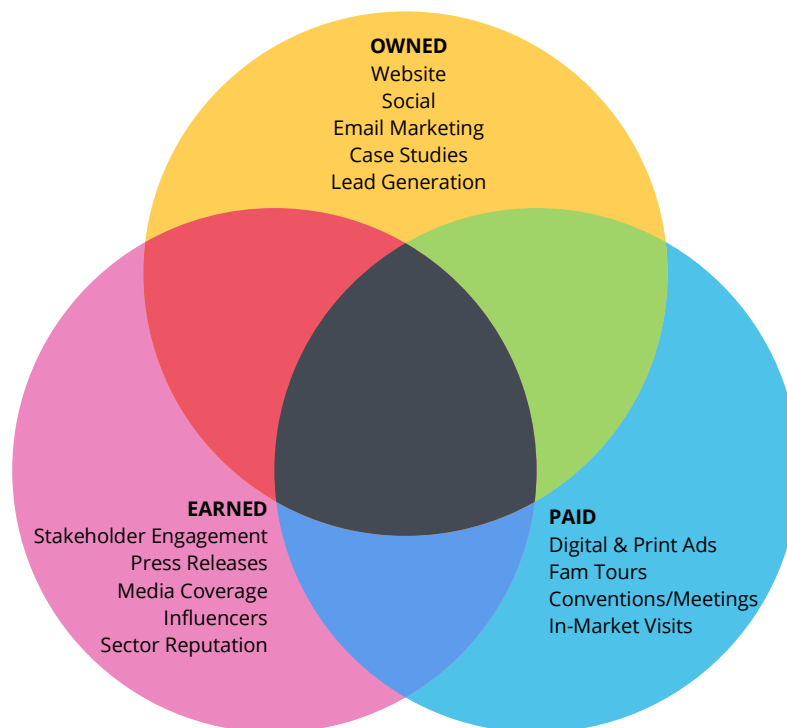
Increasing outreach by deploying tactical marketing and communications strategies in accordance with the most-effective strategies and techniques in economic development marketing can benefit OEV's overall efforts in successfully attracting the deployment of capital to Tallahassee-Leon County.

Tactic: Deploy a suite of outreach tactics that support business development goals *(Implement, Ongoing)*

OEV along with its regional partners should strive to incorporate the following four outcomes into marketing and communications initiatives.

1. **Awareness:** Increase awareness of Tallahassee-Leon County and its competitive advantages, existing industry strengths, the diversity of the community, and the willingness of area partners to help companies succeed.
2. **Reputation:** Enhance the community's reputation among site selectors, commercial real estate developers, companies, entrepreneurs, and existing employers, as well as national and international media, as an area that offers a business-friendly environment in which companies and their employees will succeed. Highlight strategies undertaken during COVID to keep businesses open, retain talent, and build resiliency.
3. **Engagement:** Support the efforts of regional partners and continue to engage state and community leaders as well as potential investors in the community's economic development efforts.
4. **Recruitment:** Proactively recruit and retain business in the community and the region overall. Leverage the support of partner organizations to increase the project pipeline and wins.

To realize these goals, OEV should utilize a suite of marketing and communications channels. The channels are broken down into three categories: owned, earned, and paid.



Outreach Tactics

The following table outlines ideas for outreach tools that will support key messages, strategies, and tactics. These can be undertaken by OEV and in some instances local partners. This is not a comprehensive list, and items are not necessarily listed in the order they would be implemented.

Tactic	Description
MESSAGING & OUTREACH <i>(Assets outlined below.)</i>	<ul style="list-style-type: none"> Compelling and meaningful messages are vital to successful economic development. The messages will be used in interviews, digital media, presentations, web materials, and other media. Developers, business owners and others want to be assured that their investment in the community will have broad support from local leaders, residents, and key partners, and consistent messaging can offer that confidence. Audience: All Measurement: Consistent use of messaging throughout all communications tools
Top-Line Talking Points	<ul style="list-style-type: none"> County and regional overall talking points The importance and tactical use of incentives The workforce, educational attainment, and talent diversity stories Local and regional benefits talking points, including mitigation of risk
Grasstops Outreach	<ul style="list-style-type: none"> Messaging for local officials and stakeholders to convey to their sphere of influence High-level talking points regarding economic development and the importance of private sector and foreign direct investment Key accomplishments and success stories Important metrics
Fact Sheets & Infographics	<ul style="list-style-type: none"> Site sheets Asset fact sheets for Innovation Park and the Airport Community profile
Legislative Session & Activities with Delegation	<ul style="list-style-type: none"> Talking points and/or presentations targeted specifically at legislators who can help provide additional site development funding and infrastructure assets. Leverage local success stories in communicating with legislators.
Leverage Testimonials	<ul style="list-style-type: none"> Testimonials tell the story of why the county and the overall region are attractive to business.

VIRTUAL PRESENTATIONS <i>(See specific recommendations on later page.)</i>	<p>Virtual technology and virtual presentations bring a level of sophistication for EDOs. Organizations can project an image to prospects and clients that best illustrates its assets, resources, and vision for growth. Through the creative use of technology, an understanding of data, and a clear articulation of the county's and the region's business benefits, presentations can position and communicate the value proposition to each key audience.</p> <p>Develop a non-linear presentation that responds to the audience's needs. A non-linear presentation simply means that you will not necessarily start at the first slide and proceed sequentially. The slides will be structured similar to a website, enabling the presenter to respond to their audience's area of interest by clicking on a topic that is hyperlinked.</p>
CONFERENCES & EVENTS	<ul style="list-style-type: none"> As in-person events begin to increase, consider attending and leveraging industry conferences and events to inform decision-makers about the region, available sites, and unique workforce programs.
DIGITAL & SOCIAL MEDIA	<ul style="list-style-type: none"> There are several key components to an effective integrative digital and social media approach that should be considered and utilized with all the activities listed below, including: <ul style="list-style-type: none"> The communications efforts must be integrative, combining online and traditional communications strategies (those listed in the previous section). The efforts must be targeted and efficient. No single digital medium can stand alone; combine to maximize results. The efforts are acquisition-focused to decision-making audiences and influencers. All marketing must be optimized for desktop, tablet, and mobile devices. Marketing must contain staff contact information that is easy to find. Audience: All Measurement: Consistent use of messaging throughout all communications tools
Website Enhancement <i>(See specific recommendations on later page.)</i>	<ul style="list-style-type: none"> EDO websites serve as the foundation for today's virtual marketing efforts. Given the focus on a community's online presence, OEV should implement several tactics to improve the user's experience on the site. Enhance promotion of available sites and buildings. Enrich website data and infographics with an external, out-of-market audience in mind.
Search Engine Optimization	<ul style="list-style-type: none"> Google's Webmaster Guidelines suggest making pages primarily for users, not search engines. That includes consideration of how pages on your website might appear in Google, including the title, URL, and description. Measurement: Website tracking data – Sessions including new users, time on site, pages, referral sources, and bounce rate

Performance-Based Online Advertising & Retargeting	<ul style="list-style-type: none"> Content advertising is an extremely intent-driven medium that reaches individuals at the moment of inquiry. Google offers several services based on content that can be used to promote Tallahassee-Leon County, all of which target users based on behavior and demographic. Through Google, OEV can expect high click-through rates and quality clicks. Consider the use of display banner advertising and retargeting in small campaigns. Audience: Site selectors and decision-makers/influencers Measurement: Reach and click-through rates Budget: Cost per click
Search Engine Marketing / Paid Search	<ul style="list-style-type: none"> Paid search ads appear within or adjacent to Google search results when users search for relevant keywords or topics. Cost is determined based on a bidding process. Search ads let you determine your budget, keeping costs low. Create search ad and determine budget and timing. Use results/measurements to determine success and adjust accordingly. Audience: Site selectors and decision makers/influencers Measurement: Reach and click-through rates Budget: Cost per click
Email Marketing	<ul style="list-style-type: none"> Email marketing is a cost-effective medium for building relationships and maintaining regular contact with audiences, customers, and prospects. By implementing a meaningful email marketing campaign that appeals to key audiences with a limited number of stories and messages, OEV can stay top of mind with its target audiences. Audience: Site selectors, C-level decision-makers, and influencers Measurement: Open rates and click-throughs should be at or higher than industry averages (20 percent open rate and 2 percent click-through rate)
Targeted, Content-Rich Email Blasts	<ul style="list-style-type: none"> Identify targeted audience for limited email outreach (100–250 members in target industries). Develop schedule and ideas for emails that relate the benefits of the county and the available sites and workforce. Determine frequency and timing and be consistent in delivery. Optimize content for mobile viewing.

Tactic: Improve website and online presence to enhance communication with out-of-market audiences *(Implement, Ongoing)*

Potential economic development projects often begin with the consideration of states and defined geographic regions. Rarely does a prospect, company, or site selector have a specific community or county in mind. Communities and regions can, however, increase their visibility through a strong online presence.

While OEV recently launched a new website with a clear design and concise information that was recognized with a silver award by the IEDC, opportunities remain to enhance OEV's online presence, expand its reach to regional, national and international external, out-of-market audiences that share competitive advantages and sites with interested investors.

The economic development websites most valued by site selectors and business decision-makers:

- understand their audiences and speak to them in their own language;
- are heavy on bulleted facts and light on filler;
- provide relevant data in formats that users can download and manipulate;
- are easy to find, fast, and easy to use;
- have the right content, organized in an intuitive way;
- are current, visually attractive, and regularly updated;
- use photos and infographics to highlight key pieces of information; and
- make the organization's contact information clear and accessible.

OEV can improve its website using the eight elements outlined above. Also considering implementing the following recommendations.

- **Maps:** The homepage should showcase maps that feature the community's location within the state, the southeast, and the nation. Consider how foreign direct investment companies and those not familiar with the area would be able to understand location. Also consider highlighting logistical advantages of community assets and showcasing that within the site.
- **Competitive Advantages:** Instead of relying on the audience to interpret data into their own narrative, use the data to synthesize and emphasize competitive advantages for target industries. Each part of the narrative must answer the question, "How does this fact help a business's bottom line?"
- **Regional Data:** OEV's website is most well-known for its data dashboard, which empowers users to dive into the details of the data. There is a need, however, to highlight strong numbers/percentages as compared to the state and the nation. Emphasize these by using simple infographics and short narratives rather than the

numbers alone.

- **Incentives:** In re-evaluating the website, consider adding a two-page fact sheet about incentive programs and associated forms and criteria.
- **Workforce:** While communities have improved in featuring the workforce on their websites, they often list basic demographic information and educational institutions. In a hyper-competitive market, organizations must highlight what business decision-makers cannot already find through online databases. Websites must demonstrate partnerships with educational and workforce partners along with industry. Give specific examples and timelines of how success was achieved, considering highlighting various degrees and certificate programs within target industries. In addition, each target industry page should feature relevant workforce and education statistics.
- **Case Studies and Testimonials:** Seeing success from a company perspective helps differentiate a community. Success stories need to be told throughout the website and throughout the entire year, not saved for annual reports. Testimonials should help a company understand the community behind the numbers. Include testimonials from owners of businesses of all sizes on why they choose to live and work in the county or region. Feature professionals that are passionate about the region and the type of industry thriving in the region. Use sidebars or callout boxes, with infographics and statistics, to generate more visual interest.
- **Newsroom:** Go beyond the current blog and create a newsroom that features case studies, fact sheets, bios, and presentations. Consider including the following in a newsroom:
 - Filters such as announcements, case studies, reports, and dates
 - Fact sheets on projects, state or regional rankings, and partner releases
 - Success stories or case studies
 - Press releases
 - Multimedia, including videos, photos, and interviews
 - A search function by date, subject, and content type
- **Contact Information and Call to Action:** Every page on the website should have a contact with a photo and a direct phone number and email address. Also include a call to action on each page to direct the user as to what to do next.

Tactic: Enhance technology to highlight assets *(Implement, Mid-Term)*

Technology has made it easier for organizations to project an image to prospects and clients that best illustrates its assets, resources, and vision for growth. Virtual tours and presentations are available in a variety of platforms and formats. Several tools are available for minimal investment, such as interactive Google Earth files (KMZ), layered PDF maps, linked digital presentations, and interactive photography. These tools, partnered with

clearly defined competitive advantages, including key messages and benefits of business growth in the area, ensure OEV can optimally present its product offerings.

While drone videos and photography are an effective marketing tool, enhancing drone or camera property photography by creating 360° interactive photos for sites and buildings increases engagement by prospective clients. Popular, easy-to-use, and budget-friendly solutions for creating 360° virtual tours and sharing them on the web and in virtual reality platforms include Kuula, 360cities, and Roundme.

INCREASE POSITIONING FOR TOP SITES & BUILDINGS

Positioning the best sites and buildings for increased visibility and consideration is critical in today's marketplace. Even before the pandemic, initial site selection research was conducted online by evaluating workforce demographics, incentives, and sites and buildings. Many EDOs use site and building databases to showcase properties but given the speed with which a site selector needs to narrow down locations, these tools can feel overwhelming, cumbersome, and unusable on mobile devices.

At the same time, the topic of finding ready sites has become an industry-wide conversation. Consider this excerpt from [a recent publication](#) from *Area Development* magazine:

Across the nation, finding well-positioned, developable land with utilities and infrastructure has become almost impossible in some areas. Just about all of it has been scooped up by hungry buyers. Competition for land zoned for industrial/warehouse development is particularly intense.

Considerations for greenfield acquisition are quite different than improved land. Notably, buyers must factor in additional risk related to timing and cost of utilities and infrastructure. Timing adds a lot of risk because no one knows what the market will be like by the time the land is ready for vertical development.

Tallahassee-Leon County has a limited number of true industrial sites for targeted industries. Each must be consistently marketed to increase awareness of the area. Given the market and the desirability of ready sites, **OEV should improve online marketing and promotion of top sites on its website, demonstrating competitive advantages and due diligence performed.**

Improve site overviews: Prior to sending a visitor to a site and building database, feature key sites and associated selling points and due diligence in both online materials and downloadable PDFs. Demonstrate not only the site size but also access points in the region, including infrastructure, workforce, utilities, and regional/state/national maps. The checklist in Figure 11 can help ensure consistency, inform and establish trust among potential customers, and improve asset awareness. Consider piquing a visitor's interest by featuring

an airport site on the Aviation target industry page, using the layout and details on the [AR-TX REDI website](#) as a best practice.

FIGURE 8: COMPETITIVE PROPERTY CHECKLIST

<ul style="list-style-type: none"> <input type="checkbox"/> Recent Aerial Photography <input type="checkbox"/> Letter of Commitment (if applicable) <input type="checkbox"/> Conceptual Site Plans <input type="checkbox"/> Covenants <input type="checkbox"/> Executive Summary <input type="checkbox"/> Flood Map <input type="checkbox"/> Foreign Trade Zone <input type="checkbox"/> Gantt Analysis/Timeline <input type="checkbox"/> Infrastructure Development Plans for Sites not Shovel-Ready <input type="checkbox"/> Location/Vicinity Maps <i>with local and regional amenities:</i> <ul style="list-style-type: none"> <input type="checkbox"/> Global <input type="checkbox"/> U.S. <input type="checkbox"/> Regional <input type="checkbox"/> County <input type="checkbox"/> City <input type="checkbox"/> Ingress/Egress Routes to Property <input type="checkbox"/> New Market Tax Credits <input type="checkbox"/> Ownership / Tax Maps 	<ul style="list-style-type: none"> <input type="checkbox"/> Report/Summaries: <ul style="list-style-type: none"> <input type="checkbox"/> Phase I <input type="checkbox"/> Environmental <input type="checkbox"/> Geotechnical <input type="checkbox"/> Soils <input type="checkbox"/> Wetlands <input type="checkbox"/> Topography Map <input type="checkbox"/> Zoning Map <i>with surrounding areas up to one mile</i> <input type="checkbox"/> Utility Maps <i>with existing and proposed utilities defined and providers). Consider using the APWA color guide to highlight current and proposed utility infrastructure.</i> <ul style="list-style-type: none"> <input type="checkbox"/> Broadband/Fiber <input type="checkbox"/> Electric <input type="checkbox"/> Natural Gas <input type="checkbox"/> Telecommunications <input type="checkbox"/> Water <input type="checkbox"/> Wastewater and Sewer
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BEST PRACTICES

- Provide downloadable links to existing **KML/KMZ Google Earth files** on executive summaries on online databases.
- Enhance drone site footage to create **360° interactive drone photos** for virtual site tours to engage prospective clients.
- **Use inexpensive customized templates** (Microsoft Word and PowerPoint) from a site like [creativemarket.com](#) to develop executive summaries.

OEV should also encourage local commercial brokers to adopt these best practices.

Create concise site videos: Video can be a powerful way to share content and competitive advantages in a way that is easily accessible to a large audience. Videos should be no longer than two minutes. Use a combination of videography and graphics to underscore key messages. Consider featuring:

- **Unique Identifiers** – Videos showcasing unique offerings only found in the community or region, such as events, neighborhoods, and venues that employees and employers could experience.

- **CEO Testimonials** – Videos communicating the trust that existing industry has in their community through one-on-one interviews.
- **Deal Flow** – Videos showcasing corporate project wins for attraction and/or relocation.

When using video to highlight a site, consider including:

- Messages about what the viewer will see
- A map that depicts national-, regional- and community-level location
- Landmarks such as major cities, airports, ports, and interstates
- A handful of competitive advantages or features, such as:
 - Ownership
 - Acreage and/or square footage (consider hectares and meters for foreign direct investment viewers)
 - Utility providers, line placements, size, and capacity
 - Quality of place, including neighborhoods (and price points) and amenities
 - Educational providers, including number and types of training programs

Tactic: Expand the Tallahassee-Leon County business narrative through strategic external, out-of-market messaging *(Implement, Ongoing)*

Economic development marketing is a long-term, ongoing proposition. Therefore, it is critical to effectively communicate the advantages the county has to offer a business and, when appropriate, high-level talent.

Clear, well-constructed messages help people break through information overload and choose from among many different sources of information. The goal of the messaging points is to shape opinion and motivate behavior. It is based on three principles of effective communication and persuasion:

- Opinion is often shaped by a relatively small number of opinion leaders—those who are knowledgeable, influential, and articulate.
- A message is more believable if the source is credible. The economic development staff and community must deliver the narrative honestly, clearly, and from a position of expertise.
- Messages are most persuasive when they are simple, relevant, consistent, aligned with the audiences' needs, concerns, and interests, and repeated over time using multiple methods of delivery.

Audience Segmentation

The primary focus of a tactical marketing and communications strategy is lead generation and awareness building. OEV has achieved a host of successes, including increased awareness around the MagLab and several new location and expansion announcements. The combination of strong economic developers, proactive workforce and education

partners, and forward-thinking infrastructure projects has increased the region's marketability.

With that in mind, efforts have been aimed at communicating specific messages to target audiences.

- **Businesses know:** OEV and Tallahassee-Leon County understand and respond to rapidly-changing industry needs and utilize partnerships to increase success. The community demonstrated its capacity and business-friendly climate during COVID by ensuring businesses could stay open and locate needed talent.
- **Site selectors know:** OEV brings together numerous partners to help companies mitigate risk, identify and employ a skilled workforce, and leverage resources for bottom-line benefits.
- **Policymakers and legislators know:** OEV collaborates and aims to diversify the economy by promoting the region to national and global audiences.
- **Regional leaders know:** What is happening in economic development at the local and regional levels and know how to promote it.

With that in mind, OEV should use audience segmentation to determine what messages should be conveyed, to whom, and with what action as the goal. Specifically consider:

- What do we want them to think?
- What do we want them to do?

TARGETED EXTERNAL & OUT-OF-MARKET STAKEHOLDERS

C-Suite Decision-Makers (U.S. and International, out-of-market): Ultimately, business location decisions are made by top-level executives in a firm. Ensuring that C-level decision-makers in the key industries are aware of Tallahassee-Leon County and understand the area's and the state's value propositions will be an important factor in influencing the perceptions of those considering relocation or expansion.

Site Location Consultants (Out-of-Market): Site location consultants often assist large firms in major location projects. They are an influential group who can bring multiple significant projects to the state over time. Building a solid relationship with this group and ensuring they are aware of the community's business and industry advantages is paramount to success. The objective is to create relationships that keep the area front of mind and generate opportunities for the development to be a part of the competition as project opportunities arise.

Industry and Economic Development Media: Informing and engaging national and international industry and economic development media about the community as well as the region and building positive perceptions of northwest Florida is a cost-effective method of getting key marketing messages out to large, targeted audiences. Ensuring Tallahassee-

Leon County is positioned positively in national and international markets, industry, site selection, and in-state media will positively influence business perceptions.

Government Officials: Government leaders can play a role in creating a business-friendly environment through regulations and policymaking as well as providing investments in communities for infrastructure, logistics, workforce, and other priorities.

Existing Industry: Existing industry is critical in creating and maintaining a diverse economy. Existing industry is generally a larger creator of new jobs and capital investment than new projects.

TARGETED INTERNAL STAKEHOLDERS

Government Officials: Although government leaders are external stakeholders, they are also an internal audience to the organization's funding use and effectiveness measurements. OEV should ensure leaders are aware of the many activities being undertaken that support job creation and capital investment and how pro-business policies influence location decisions.

Utilities: Major utilities and local energy co-ops have a vested interest in economic development, and many provide economic development services and financial programs within their territories.

Educational Entities: Tallahassee-Leon County's institutions of higher learning are key partners in providing a skilled and trained workforce to targeted industries, and they need to be aware of industry labor needs.

Civic organizations, nonprofits, and chambers of commerce: These nonprofit organizations can help spread awareness of shared messages and goals. They have large reaches and can influence the culture of a community. These organizations also serve as important funnels of information to talent.

Small Businesses: Small businesses are the backbone of many communities. Keeping them informed as to how proactive and competitive economic development efforts benefit their business, as well as ensuring they are aware of any programs or services that benefit them, is important.

Residents: Residents play an important role in supporting community efforts to attract new and expanding business and industry. By engaging this group, the organization can foster an environment conducive to economic growth and job creation.

Using Research & Engagement to Shape the Plan

VisionFirst conducted research and engagement (found in the appendix) throughout the strategic planning process to pinpoint key opportunities and challenges leading to informed decisions about OEV's next five years of implementation activity.

Taking into account fiscal responsibility and increased market competitiveness, the importance of research and stakeholder engagement cannot be overstated for economic development organizations (EDOs) and how they determine their work plans.

Research provides the linchpin for sound strategic planning as it provides a comprehensive picture of the organization's and the community's current situation and suggests directions for improvement. Ultimately, research and engagement lays the crucial foundation for the planning process and the strategies and tactics recommended.

When developing the strategic plan, four questions were considered throughout the research and engagement phase:

- Where are Tallahassee-Leon County's economic development efforts today?
- What assets does the community have to compete in the current economic climate?
- Where does Tallahassee-Leon County want to be in the next five years, considering OEV's mission and vision?
- How does OEV implement strategies and tactics to get there?

With those questions in mind, VisionFirst conducted research and engagement in six sectors:

1. **Looking at the community from a site selector's perspective.** (First Impressions)
Companies may employ site selectors (either in-house or outside consultants) to review regional areas that fit their criteria. These site selectors analyze relevant labor and other demographic information available as they relate to the factors determined above. The site selection process is basically a process of elimination, where a company may initially have 100+ locations internationally and eventually end up with three to five states/regions/cities.
2. **Engaging stakeholders in the process.** (In person meetings, Stakeholder Survey)
Tallahassee-Leon County is known for its strong commitment to stakeholder input. Understanding the importance of stakeholder feedback, VisionFirst gathered the perspectives of more than 100 leaders through various approaches including field visits, one-on-one interviews, facilitated group meetings. In addition, an online stakeholder survey was conducted that garnered more than 150 responses.
3. **Utilizing data to understand the current economy and competitive position.** (Data Analysis)
To successfully build a suite of strategies and tactics, it was critical to first analyze the current economy as well as the market changes over the last five years

including the most recent global pandemic. The focus of the analysis is to uncover trends and future projections. Using both quantitative and qualitative data, emphasis was placed on location quotients, industry strengths and targets, labor force participation rates, occupation gaps and surpluses, advanced industry employment and wages. This data will compare the Tallahassee-Leon County including the MSA and how it compares to the state and nation from site selector and investor perspective. VisionFirst Advisors compiled data from numerous trusted state and national sources.

4. **Understanding current and future labor availability.** (Workforce Analysis) Creating economic competitiveness, vitality and vibrancy in a region is now largely dependent on the quality of its workforce. The most important way for communities to be competitive is to build a sustainable infrastructure for workforce development that is adaptive and responsive to local industry needs. VisionFirst met with education and workforce officials and analyzed a host of data to demonstrate the workforce availability as well as the talent pipeline initiatives being undertaken to support business and industry.
5. **Optimizing value of products and assets.** (Sites & Buildings Competitiveness Ranking) The pandemic has clouded the economic development roadmap and the resulting uncertainty is causing many companies to scale back their approach to expending capital. This means potentially less opportunities in an already highly competitive economic development environment. For communities to compete, it is critical that risk is mitigated especially as it relates to a community's product including sites, buildings, workforce and regional assets. VisionFirst reviewed sites and buildings with an asset optimization approach that will analyze data, assess risks and opportunities and offer recommendations to maximize marketability.
6. **Building a SWOT analysis and subsequent leverage points.** (SWOT & Leverage Points) Based on conversations with stakeholders and in-depth labor and industry research, VisionFirst conducted a SWOT regarding the community's economic development efforts as well as the area's overall competitiveness. This analysis was an evaluation of the overall economic development climate, not solely the efforts of OEV, and was based heavily on qualitative input and industry knowledge. SWOT analyses are often conducted for discovery purpose only. VisionFirst goes beyond the initial analysis and develops strategies to leverage or capitalize on each strength or opportunity and to minimize or mitigate weaknesses and threats. These strategies, or "leverage points", help illustrate the timeliest, most important actions for the county to execute to strengthen its position, achieve its mission, and move the community to a greater competitive stance for jobs and investment.

Each of these sectors and the research conducted are contained in the appendix.

Moving Forward

Over the past year, VisionFirst Advisors developed OEV's first strategic plan by gathering data and trends, seeking stakeholder input from a variety of sources, and providing context to the analytics. A combination of new ideas with the proven methodology of stakeholder input and data led to this new strategic plan. Fine-tuned to Tallahassee-Leon County's needs, this plan evaluates how to attain continued progress and build resiliency in the face of future economic disruptions

With a new plan comes a new approach—one that considers the successes and challenges OEV has experienced over the past five years. This strategic plan recommends a new suite of focused, mission-critical strategies to build on OEV's foundational efforts. To identify objectives and organize them into a new strategic plan, VisionFirst took a holistic approach in assessing where Tallahassee was five years ago, where it is now, and what the future should look like.

As compared to the original plan, this one offers strategies that are meant to give the organization an unerring focus on business recruitment, retention, and expansion as well as on building the project pipeline through marketing and communications efforts. These suggested strategies and tactics are also meant to align with both the county and city strategic plans. Within each strategy is a series of tactics that provide an approach to implementation. The number of tactics is fewer than in the original plan, with the intention of each one generating a greater, more immediate impact, in conjunction with the implementation of the work plan developed by OEV with key actions and metrics.

Again, the OEV team has diligently implemented the original plan; these recommendations are meant to complement the continued on-going work of the current strategic plan. The on-going work of the current strategic plan accounts for approximately 40% and should be incorporated into an updated work plan developed by OEV.

We are honored to continue our partnership with OEV to create this new strategic plan – and look forward seeing the continued economic growth in our home-town community, Tallahassee-Leon County.

Appendix: Engagement & Analysis

First Impressions

Communities often experience difficulties seeing their surroundings as clients, guests, prospective industries, and newcomers to the area might see them. Below are first impressions as they may be perceived by a site selector comparing Tallahassee-Leon County to competitor communities.



OPPORTUNITY TO TOUT SUCCESSSES

Few internal stakeholders realize OEV's efforts in supporting existing industry, the location of a 1,000-job Amazon fulfillment center, and the deployment of local and Leon CARES funding to local businesses. OEV should increase marketing and communications efforts to promote its impact on the local economy. It is important to highlight community success stories and to emphasize the many initiatives being led or supported by OEV.



NEED TO MITIGATE PERCEIVED STRUCTURAL RISK

Companies looking to locate often consider risk as part of eliminating sites. Two often-considered risk factors are speed to market and confidentiality. OEV's efforts in improving the level of economic prosperity in the community. Lengthy policy procedures and excessive regulations can impact the community's competitiveness and business acumen in the minds of prospects.



LEVERAGE UNIQUE ASSETS

Tallahassee-Leon County has several unique assets, such as the MagLab, that OEV has begun marketing to internal and external, out-of-market stakeholders. With available incentive funds, asset-based economic development approaches should be increased. OEV should leverage additional unique assets such as a top-tier HBCU in Florida A&M, land around the airport, Innovation Park, and the Airport Gateway project. Each of these assets can be marketed to prospects in addition to tax reimbursements, fast-track permitting, and other business-friendly policies.

Stakeholder Feedback

In Your Words – VisionFirst hosted more than 60 stakeholder meetings with more than 100 elected officials, existing business leaders, small businesses, and community members. In addition, stakeholder feedback from two virtual townhalls and a survey conducted by MIT on minority, women, and small business engagement and capacity building was also included in the development of the strategic plan.

Conversations with OEV staff members enabled VisionFirst to gain a better understanding of current operations, programs, products, and services. These conversations also helped identify challenges faced due to macroeconomic trends and local issues, especially as the nation and the community assess the impacts of the COVID-19 pandemic.

Meetings with business and community stakeholders enabled VisionFirst to gain insights through the lens of each group's focus and discover how OEV can find long-term success in its economic development efforts. Every stakeholder meeting generated productive dialogue around the city and the county's future and identified both critical issues and attainable opportunities. During the conversations, VisionFirst sought answers to questions centered on such topics as:

- How has economic development changed in Tallahassee-Leon County over the last five years since OEV was created?
- What has changed in the market—especially considering COVID—that may change the focus of how economic and community development activities are handled?
- Looking ahead to the next five years, what industry sectors do you think Tallahassee-Leon County is best suited for?
- What are the community's best assets? What are its biggest challenges?
- What should be the top priorities related to sites and buildings?
- How do you think funds should be used for economic development?

Key findings from the meetings are presented in aggregate on the following pages. They have been grouped by the main themes that resulted from the stakeholder conversations. Although the meetings focused on OEV and its role in leading local economic development efforts, the discussion also covered the needs of the broader community. **The comments listed are a sample of the meeting outcomes from local stakeholders and do not reflect VisionFirst's opinion.**

CONTINUE TO ENGAGE STAKEHOLDERS REGARDING OEV'S EFFORTS

- OEV has done an impressive job in its outreach to the community over the last five years, but many internal and external stakeholders remain unaware of these efforts.
- Deploying local and federal funds to area businesses did enable many to experience OEV's high-performing team.

- The Minority, Women, and Small Business Enterprise (MWSBE) division is seen as having a positive impact in the business community.
- OEV's Data Dashboard is a major asset to a variety of leaders.
- There is a perceived disconnect between OEV and the business community.
- Confusion exists about what falls under OEV funding versus Blueprint funding.

INCREASE FACILITATION OF PRIVATE SECTOR JOB CREATION

- There is a need for increased recognition of existing industry by officials at all levels of government.
- Challenges exists with utilities, zoning, and permitting. A lack of urgency leads to a slower speed to market and can hinder growth and retention.
- Stakeholders believe community growth is beneficial but would like to see more equitable growth throughout the community.

INCREASE MARKETING & COMMUNICATIONS EFFORTS

- The last five years have been focused on internal outreach; for the next five years, OEV should increase external outreach efforts surrounding the County's assets to decision makers out-of-market.
- Some residents are concerned about continued growth; OEV must communicate to the public the community benefits of new industry and private sector job creation.
- There is a need to demonstrate the transformational impacts of large private sector projects as opposed to the transactional nature of market-driven industry sectors.

CONSIDER A REGIONAL APPROACH TO PRODUCT & SITES

- The lack of available sites and developable land are challenges for companies looking to expand to or locate in Tallahassee and demonstrate the need for regional project coordination.
- Tallahassee International Airport represents untapped opportunities for development.
- Many of the region's assets are going unnoticed by prospects.

CONTINUE TO LEVERAGE UNIQUE ASSETS

- OEV has focused on promoting the benefits of the MagLab, and audiences are recognizing the efforts; turning recognition into winning projects, however, takes time.
- With an increased national focus on equity, diversity, and inclusion, Tallahassee-Leon County has a tremendous asset in Florida A&M University (FAMU) and its high-performing programs and areas of study.

Stakeholder Survey

VisionFirst Advisors, along with OEV, sought stakeholder input in the economic development process through an online survey. This survey was targeted at key stakeholders including business leaders, elected representatives, education providers, and other influential leaders and organizations in the community, rather than the public at large.

The survey, taken by more than 150 people, gave these key stakeholders the opportunity to provide feedback on how they feel about the role of economic development in Tallahassee-Leon County, what type of growth and industry they think is best suited for the community, and what they believe are the top economic development priorities OEV should pursue. Feedback from community and business leaders also helped in discerning the developments and trends occurring in the local economic climate.

Overall, the results show that stakeholders believe that OEV has been successful in its economic development efforts over the past five years and that Tallahassee's economic climate has improved. Respondents believe Tallahassee's main economic development priorities should be encouraging the growth of existing industry and retaining and expanding startups and small- to mid-sized businesses. Tallahassee's greatest strength is overwhelmingly seen as access to research and development through universities and colleges, and its biggest challenges are seen as limitations at the airport and regulatory restrictions.

Other takeaways from the survey include:

- OEV should set the vision for economic development, but **confusion around funding exists**.
- Stakeholders would like to see a **diverse industry sector that leverages assets** such as the MagLab, universities, and existing industry (including Manufacturing), a **stronger entrepreneurial climate**, and **more resources and support for existing industry** in targeted sectors.
- Priorities for the MWSBE division include building a qualified workforce through **training, apprenticeships, and business retention**.
- The **top three advantages** are access to research and development in higher education, low operating costs, and state tax policies.
- The **top three barriers** are the airport (costs/flight availability), a restrictive regulatory and political environment, and the perception of being a government/college town.

QUESTION 1: The Office of Economic Vitality serves as the lead economic development organization (EDO) for Tallahassee-Leon County. The organization was launched five years ago in conjunction with the first strategic planning effort. How would you measure OEV's progress since that time?

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
OEV has been a helpful and useful resource for businesses.	33.73%	39.05%	18.93%	5.92%	2.37%
There has been increased support for minority- and women-owned businesses.	30.30%	37.58%	22.42%	3.64%	6.06%
The mission and goals of OEV are clearly defined.	24.26%	47.34%	16.57%	7.69%	4.14%
Private sector leadership is integrated with OEV and the economic development process.	17.96%	35.93%	36.53%	7.19%	2.40%
Stakeholders are aware of OEV and its successes.	15.06%	43.98%	24.70%	12.65%	3.61%
The current governance structure is allowing OEV to achieve its objectives.	13.17%	31.14%	40.12%	10.18%	5.39%

QUESTION 2: From an economic development standpoint, how has Tallahassee-Leon County changed in the past five years?

	IMPROVED	NOT IMPROVED
Support for minority- and women-owned businesses	84.47%	15.53%
Startup and entrepreneurial climate	82.82%	17.18%
Expansion of existing industries	77.30%	22.70%
Partner collaboration	68.55%	31.45%
New job creation	67.90%	32.10%
Public and private sector in the economic development process	66.46%	33.54%

QUESTION 3: What should be Tallahassee-Leon County's top priority for economic development? Rank in order of importance, with 1 being the highest.

	1	2	3	4	5	6	7	8
Encourage the growth of existing local businesses and industries	30.63%	17.50%	18.13%	15.63%	7.50%	6.25%	3.13%	1.25%
Recruit new industries and employers	20.00%	14.37%	10.63%	12.50%	8.13%	14.37%	11.25%	8.75%
Diversify the job market and economic base	17.39%	18.01%	13.04%	11.18%	13.66%	10.56%	8.70%	7.45%
Support minority- and women-owned businesses through supplier diversity, resource identification and business retention efforts	9.70%	8.48%	10.91%	5.45%	12.12%	12.73%	16.97%	23.64%
Create a strong entrepreneurial climate	9.43%	13.84%	16.35%	18.87%	13.21%	15.72%	6.92%	5.66%
Build the local workforce	8.02%	14.20%	8.64%	8.02%	16.67%	14.81%	14.20%	15.43%
Market Tallahassee and its business community /advantages	4.38%	8.13%	10.63%	14.37%	13.13%	14.37%	16.88%	18.13%
Collaborate regionally to aid area businesses	1.90%	6.96%	12.03%	13.29%	14.56%	10.13%	20.89%	20.25%

QUESTION 4: What should be the MWSBE division's top priority in economic development? Rank in order of importance.

	1	2	3	4	5	6
Building a qualified workforce through training and apprenticeships	34.64%	16.34%	16.99%	12.42%	13.73%	5.88%
Business retention	22.93%	21.66%	17.20%	13.38%	18.47%	6.37%

Financing	14.29%	18.01%	18.63%	13.04%	9.94%	26.09%
Resource identification	12.00%	21.33%	21.33%	18.00%	18.00%	9.33%
Data collection	9.09%	11.69%	13.64%	17.53%	19.48%	28.57%
Supplier diversity	8.50%	12.42%	13.07%	25.49%	19.61%	20.92%

QUESTION 5: As part of the one-cent sales tax, the Office of Economic Vitality receives 12 percent to encourage industry diversification and job creation. How do you think sales tax funds should be used for economic development? Rank in order of importance.

	1	2	3	4	5
Retaining and expanding startups and small to mid-sized businesses, as well as fostering commercialization	34.81%	24.05%	19.62%	15.19%	6.33%
Recruiting new employers to locate to Tallahassee-Leon County	28.39%	16.77%	20.00%	23.87%	10.97%
Developing buildings/sites to have more availability for businesses to grow	14.65%	12.74%	27.39%	20.38%	24.84%
Minority- and women-owned business support through supplier diversity, business retention efforts, etc.	14.20%	19.75%	18.52%	15.43%	32.10%
Facilitating the airport as an economic development catalyst to site projects and grow targeted industries	9.74%	27.27%	14.29%	24.03%	24.68%

QUESTION 6: What would you like to see from the community's economic development efforts over the next five years? Rank in order of importance.

	1	2	3	4	5	6	7
A diverse industry sector that leverages assets such as the MagLab, universities, and existing industry	37.06%	16.08%	11.89%	11.89%	10.49%	7.69%	4.90%
All the above	29.93%	5.84%	2.19%	0.73%	2.92%	6.57%	51.82%
A stronger entrepreneurialism climate	15.94%	31.16%	20.29%	13.04%	8.70%	7.97%	2.90%
Increased support for minority- and women-owned businesses	10.95%	12.41%	7.30%	13.14%	19.71%	26.28%	10.22%
More resources and support for existing industry in targeted sectors	8.70%	25.36%	28.99%	17.39%	13.77%	2.90%	2.90%
More coordination with business leadership in the economic development process	5.07%	10.14%	23.91%	28.26%	18.84%	8.70%	5.07%
Marketing/promotion	5.07%	2.90%	7.25%	14.49%	24.64%	36.23%	9.42%

QUESTION 7: What type of new businesses and industry do you want to see in Tallahassee-Leon County? Select three.

Advanced manufacturing/light industry (distribution/warehousing operations, etc.)	64.71%
Home-grown/local entrepreneurial businesses	58.82%
Life Sciences & Healthcare/Medical Technology	54.71%
Tallahassee's existing targeted industries (IT, Applied Science & Innovation)	53.53%
Business & Professional Services	40.59%
Banking & Finance	11.18%
Other (please specify)	10.59%
None, I prefer to keep the existing level of business and industry	5.88%

QUESTION 8: What do you see as the top reasons a company would start, locate, or expand in Tallahassee-Leon County? Select three.

Access to research and development through universities and colleges	56.47%
Lower operating costs	35.29%
State tax policies	34.71%
Lower cost of living	32.35%
Qualified talent pool	31.76%
Natural amenities	28.82%
Housing, healthcare and education infrastructure	25.88%
Local incentives as part of the one-cent sales tax	25.29%
Location	22.94%

QUESTION 9: What do you see as the top three barriers that prevent a company from starting, locating, expanding or staying in Tallahassee-Leon County? Select three.

Airport challenges (costs/flight availability)	54.12%
Restrictive regulatory and political environment	44.71%
Perception of being a government/college town	41.18%
Crime statistics	38.82%
No growth mindset	38.24%
Lack of available sites/developable land	26.47%
Activism, influence peddling, nimby, etc.	26.47%
Affordability and tax environment	12.35%
Other (please specify)	11.18%
Less attractive healthcare and education options	6.47%

Research & Analysis

When VisionFirst developed the original OEV strategic plan, a high-level data analysis of Tallahassee-Leon County was conducted, with emphasis placed on labor force participation rates, educational attainment, talent pipeline, industry location quotients (LQs), and leading industries. For this updated plan, a data analysis was once again conducted.

Although the pandemic inhibited expansions, relocations, and new market opportunities, it did not stop business decision-makers from community research. The project pipeline for many communities today is even more robust than it was pre-pandemic, and site selectors are using a host of data points to eliminate sites. This research primarily occurs virtually utilizing online resources and Tallahassee-Leon County is often considered for investment and new jobs without ever being aware (i.e., not through a formal request for proposals process). As the prospective locations are identified, then the site selector and/or business decision makers typically reaches out to the community.

Community Overview »

Initially, site selectors and business decision-makers review data that reflects the economic health of a community, region, and state. It is important for OEV and its partners to understand how it is being viewed before it is considered as a possibility for locating a competitive project.

While this plan focuses on Tallahassee-Leon County, site selectors and business decision-makers do not regard county lines. As Tallahassee-Leon County aims to be a regional leader for job creation and position itself to be competitive for economic development projects, the data included reflects the county, metropolitan statistical area (MSA), and a forty-five-minute drive time surrounding Tallahassee-Leon County.

LEON COUNTY 45-MINUTE DRIVE TIME MAP

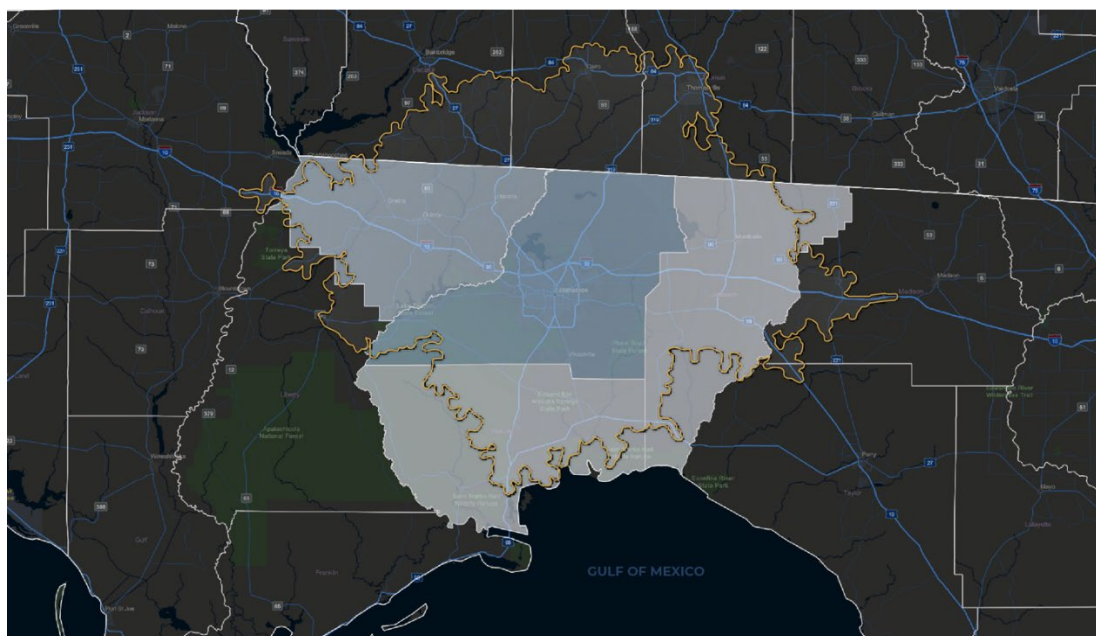


FIGURE 9: COUNTY, MSA, AND FORTY-FIVE-MINUTE DRIVE TIME ECONOMIC OVERVIEW

	LEON COUNTY	TALLAHASSEE MSA	LEON COUNTY 45-MINUTE DRIVE TIME
Demographics			
Population (American Community Survey)	289,770	382,197	481,755
Median Age	31.0	33.6	36.9
Race: White	61.4%	60.6%	60.9%
Race: Black or African American	30.9%	32.7%	32.8%
Race: American Indian and Alaska Native	0.2%	0.2%	0.2%
Race: Asian	3.5%	2.7%	2.3%
Race: Other	1.1%	1.3%	1.4%
Race: Two or More Races	2.8%	2.4%	2.3%
Hispanic or Latino (Of Any Race)	6.4%	6.6%	6.5%
Workforce			
Labor Force Participation Size (Civilian Population 16 Years and Over)	158,009	195,966	238,262
Labor Force Participation Rate (Civilian Population 16 Years and Over)	65.4%	61.9%	60.2%
Prime-Age Labor Force Participation Rate (Civilian Population 25–54)	84.1%	79.3%	77.9%
Median Household Income	\$53,106	\$52,148	\$53,866
Per Capita Income	\$30,586	\$28,766	\$27,743
Mean Commute Time (Minutes)	20.9	23.0	22.9
Educational Attainment, Age 25–64			

No High School Diploma	6.3%	9.1%	10.5%
High School Graduate	18.0%	23.0%	25.7%
Some College, No Degree	19.2%	20.0%	20.3%
Associate Degree	10.1%	9.4%	9.4%
Bachelor's Degree	27.1%	22.8%	20.2%
Postgraduate Degree	19.3%	15.6%	14.0%
Housing			
Total Housing Units	130,005	170,529	215,238
Median House Value (Of Owner-Occupied Units)	\$203,100	\$177,827	\$171,599
Homeowner Vacancy	2.2%	2.0%	2.1%
Rental Vacancy	6.5%	6.3%	5.9%
Renter-Occupied Housing Units (Of Occupied Units)	47.0%	41.6%	40.5%
Occupied Housing Units with No Vehicle Available (Of Occupied Units)	6.2%	6.4%	6.4%
Social			
Poverty Level (Of All People)	20.5%	20.0%	20.0%
Households Receiving Food Stamps / SNAP	11.9%	13.6%	14.7%
Children in Single-Parent Families (Of All Children)	40.3%	42.2%	43.9%
Uninsured	8.1%	8.8%	10.3%

Source: JobsEQ®. Median values for certain aggregate regions, such as MSAs, may be estimated as the weighted averages of the median values from the comprising counties.

In positioning the Leon County for competitive economic development projects, several data points from Figure 12 are worth noting:

- Both the MSA and the forty-five-minute drive time surrounding the county offer compelling messages.
- The average age of the county, MSA, and forty-five-minute drive time demonstrates a strong prime-age workforce availability.
- Tallahassee-Leon County has both high labor force participation rates and high educational attainment.
- The number and affordability of housing units will be attractive to companies looking to hire employees at all salary levels.
- While the community offers a sizable rental market, OEV will need to demonstrate a variety of options beyond student housing.
- Poverty and the percent of children in single family houses may lead to questions regarding affordable and accessible childcare options as well as workforce training programs that address socioeconomic concerns.

FIGURE 10: LEON COUNTY DEMOGRAPHICS VERSUS THE STATE AND THE NATION

	LEON COUNTY	FLORIDA	U.S.
Demographics			
Population (American Community Survey)	289,770	20,901,636	324,697,795
Median Age	31.0	42.0	38.1
Race: White	61.4%	75.1%	72.5%
Race: Black or African American	30.9%	16.1%	12.7%
Race: American Indian and Alaska Native	0.2%	0.3%	0.8%
Race: Asian	3.5%	2.7%	5.5%
Race: Other	1.1%	3.0%	4.9%
Race: Two or More Races	2.8%	2.7%	3.3%
Hispanic or Latino (Of Any Race)	6.4%	25.6%	18.0%
Population Growth			
Population Average Annual Growth	0.7%	1.4%	0.6%
People per Square Mile	440.3	400.5	92.9
Economic			
Labor Force Size (Civilian Population 16 Years and Over)	158,009	10,056,801	163,555,585
Labor Force Participation Rate (Civilian Population 16 Years and Over)	65.4%	58.7%	63.2%
Prime-Age Labor Force Participation Size (Civilian Population 25–54)	86,773	6,450,743	104,634,905
Prime-Age Labor Force Participation Rate (Civilian Population 25–54)	84.1%	81.2%	82.1%
Median Household Income	\$53,106	\$55,660	\$62,843
Per Capita Income	\$30,586	\$31,619	\$34,103
Mean Commute Time (Minutes)	20.9	27.8	26.9
Commute via Public Transportation	1.8%	1.8%	5.0%
Educational Attainment, Age 25–64			
No High School Diploma	6.3%	10.7%	10.9%
High School Graduate	18.0%	27.9%	25.7%
Some College, No Degree	19.2%	20.1%	20.7%
Associate Degree	10.1%	10.9%	9.1%
Bachelor's Degree	27.1%	20.0%	21.2%
Postgraduate Degree	19.3%	10.4%	12.3%
Housing			
Total Housing Units	130,005	9,448,159	137,428,986
Median House Value (Of Owner-Occupied Units)	\$203,100	\$215,300	\$217,500
Homeowner Vacancy	2.2%	2.3%	1.6%
Rental Vacancy	6.5%	8.4%	6.0%
Renter-Occupied Housing Units (Of Occupied Units)	47.0%	34.6%	36.0%

Occupied Housing Units with No Vehicle Available (Of Occupied Units)	6.2%	6.3%	8.6%
Social			
Poverty Level (Of All People)	20.5%	14.0%	13.4%
Households Receiving Food Stamps/SNAP	11.9%	13.6%	11.7%
Enrolled in Grade 12 (Of Total Population)	1.3%	1.3%	1.4%
Disconnected Youth	1.9%	2.9%	2.5%
Children in Single-Parent Families (Of All Children)	40.3%	39.0%	34.1%
Uninsured	8.1%	12.8%	8.8%
Foreign Born	6.8%	20.7%	13.6%
Speak English Less Than Very Well (Population 5 Years and Over)	2.4%	11.9%	8.4%

Source: JobsEQ® American Community Survey 2015–19. Disconnected Youth are 16- to 19-year-olds who are not in school, not high school graduates, and are either unemployed or not in the labor force.

In looking how to best position Tallahassee-Leon County and the region, it is important to consider comparisons to the state and the nation, as outlined in Figure 13.

- The County has a significantly lower median age than the state and the nation, which is attractive to new professionals and families.
- The labor force participation rate (civilian population 16 years and over) and the prime-age labor participation rate (civilian population 25–54) are higher than those of the state and the nation.
- The percentage of people without a high school diploma is significantly lower than that of the state and the nation.
- The County has a higher rate of people with associate degrees, bachelor's degrees, and postgraduate degrees, indicating high skilled-worker availability.
- The community is diverse. Given the national conversation on diversity and inclusion, Tallahassee-Leon County has a strong story to tell.
- While growing, Leon County is growing at a slower rate than the state and the nation. Combined with editorials advocating for less growth, companies may perceive risks surrounding permitting and speed to market.

FIGURE 11: LEON COUNTY STATISTICS VERSUS THE STATE AND THE NATION

	LEON COUNTY	FLORIDA	U.S.
Commuting			
Total Employed Population	134,054	8,923,240	144,720,200
Worked in Region of Residence	93.8%	98.7%	–
Worked Outside Region of Residence	6.2%	1.3%	–
Worked in State of Residence	98.6%	98.7%	96.2%
Worked Outside State of Residence	1.4%	1.3%	3.8%

In-Commuters	27,383	65,310	–
Out-of-State In-Commuters	3,228	65,310	–
Net Commuters	19,011	–54,253	–
K-12 Characteristics			
Total Enrollment	36,934	2,858,461	50,710,441
Pupil/Teacher Ratio	17.5	17.2	15.9
Spending per Pupil	\$8,845	\$9,663	\$12,654
Electricity Rates			
Residential	\$0.12	\$0.12	\$0.13
Commercial	\$0.09	\$0.09	\$0.11
Industrial	\$0.09	\$0.08	\$0.07
Union Membership			
Total	5.2%	5.7%	10.3%
Private Sector	1.3%	2.6%	6.2%
Manufacturing	1.4%	2.0%	8.4%
Public Sector	13.6%	28.3%	34.3%

Total Enrollment and Pupil/Teacher Ratio are from the National Center for Education Statistics, 2019-20, based on data for reported units. Spending Per Pupil is from the National Center for Education Statistics, 2017-18, based on data for reported units. Electricity Rates are cents per kilowatt-hour; data as of 2019. Union Membership is from 2019 Current Population Survey, unionstats.com, and Chmura.

Figure 14 compares various Leon County statistics that may be reviewed by site locators to those of the state and the nation.

- Most of the region's residents both live and work in Leon County. However, about 30 percent are coming from outside the county or from outside the state (given the proximity to Georgia).
- Spending per pupil is lower than that of the state and the nation. Leon County is, however, known for having a strong public school system alongside a range of charter and private school options.
- Private sector and Manufacturing union membership rates are significantly lower than those of the state and the nation. Low union membership rates will be attractive to prospects—especially potential pandemic-driven Manufacturing expansion.

Industry Sector Overview »

The largest sector in Leon County is Public Administration, which employs 29,712 workers. The next-largest sectors in the region are Health Care and Social Assistance (21,606) and Educational Services (17,546). **The sectors with the highest location quotients (LQs) in the region** are Public Administration (3.86), Educational Services (1.41), and Other Services (except Public Administration) (1.24). High LQs indicate sectors in which a region has high concentrations of employment compared to the national average.

Sectors in Leon County with the highest average wages per worker are Professional, Scientific, and Technical Services (\$86,778), Utilities (\$86,167), and Management of Companies and Enterprises (\$83,456). **Regional sectors with the best job growth** over the last five years are Health Care and Social Assistance (+2,532), Administrative and Support and Waste Management and Remediation Services (+1,868), and Construction (+880).

According to projections utilizing data alone by Chmura's JobsEQ, over the next ten years, employment in Leon County is projected to increase by 4,018 jobs. This number does not consider economic development and community development activities that are taking place. The fastest growing sector in the region is expected to be Health Care and Social Assistance, with a 1.2 percent annual growth rate. The strongest forecasts by number of jobs over this period are for Health Care and Social Assistance (+2,757), Professional, Scientific, and Technical Services (+897), and Accommodation and Food Services (+719).

FIGURE 12: LEON COUNTY TOP INDUSTRIES BY EMPLOYMENT

NAICS	Industry	Employment	Average Annual Wages	LQ	Five-Year Historical Annual % Change	Ten-Year Forecast Annual % Change
92	Public Administration	29,712	\$52,915	3.86	-0.2%	-0.2%
62	Health Care & Social Assistance	21,606	\$55,068	0.95	2.5%	1.2%
61	Educational Services	17,546	\$53,257	1.41	-0.4%	0.2%
44	Retail Trade	15,334	\$30,472	0.96	-1.6%	-0.4%
72	Accommodation & Food Services	13,312	\$17,638	1.20	-3.9%	0.5%
54	Professional, Scientific & Technical Services	11,894	\$86,778	1.08	1.1%	0.7%
56	Administrative & Support and Waste Management & Remediation Services	8,604	\$35,460	0.89	5.0%	0.4%
81	Other Services (<i>Except Public Administration</i>)	8,123	\$41,980	1.24	-0.5%	0.4%
23	Construction	6,992	\$48,714	0.77	2.7%	0.2%
52	Finance & Insurance	4,484	\$78,451	0.69	0.4%	0.0%
51	Information	3,008	\$61,348	0.99	-2.3%	-0.4%

53	Real Estate, Rental, & Leasing	2,737	\$42,089	1.02	-0.2%	-0.2%
48	Transportation & Warehousing	2,527	\$46,251	0.33	3.3%	0.0%
42	Wholesale Trade	2,367	\$70,747	0.40	-0.9%	-0.4%
31	Manufacturing	2,018	\$56,337	0.16	2.4%	-0.8%
71	Arts, Entertainment, & Recreation	1,625	\$24,645	0.70	-1.2%	0.9%
55	Management of Companies & Enterprises	641	\$83,456	0.27	0.9%	0.4%
11	Agriculture, Forestry, Fishing & Hunting	414	\$32,045	0.19	-8.3%	0.0%
22	Utilities	94	\$86,167	0.11	-0.9%	-0.8%
99	Unclassified	26	\$100,219	0.16	18.5%	0.3%
	Total - All Industries	153,065	\$49,959	1.00	0.1%	0.3%

Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, and imputed where necessary. Data is updated through 2020Q4, with preliminary estimates updated to 2021Q1.

Although Figure 15 suggests a decline in employment in target industry sectors over the next ten years, those are only projections. With persistent, targeted outreach combined with an increase in product development, OEV can successfully grow these industries.

Industries such as Information, Wholesale Trade, and Manufacturing offer higher-than-average private sector job creation opportunities for a community that is largely based on government, education, and market-based service sectors. Additionally, Transportation & Warehousing and Finance & Insurance should be pursued, even with a zero percent projected growth, these are active target sectors across the nation.

Leveraging wins such as the continued expansion of Danfoss Turbocor and the location of the Amazon fulfillment center can demonstrate to site selectors that Tallahassee-Leon County welcomes private sector investment and will be a partner in their success.

Workforce Availability & Talent »

In a competitive economic development landscape, educational attainment and workforce skills both play a critical role in community evaluation. Communities must demonstrate not only an existing workforce but also a talent pipeline that can sustain new business. With information easily available to site selectors and decision-makers, community rates of unemployment, educational attainment, and labor force participation are compared, critiqued, and considered.

Prior to the pandemic, unemployment was at a historic low and employers struggled to fill positions. The labor force participation rate, however, told economists, employers, and workforce providers another story about a growing segment of the population that could work but were no longer actively looking for work. In March 2020, the pandemic shut down the global economy. Millions became unemployed as businesses closed.

But not all businesses closed; many even grew and expanded. The Department of Labor reported that employers posted 10.9 million job openings in July 2021—the most on record since 2000. The unprecedented demand for workers is happening even as 8.4 million Americans are unemployed, up from 5.7 million in February 2020. And the economy is still 5.3 million jobs short of the number prior to the pandemic. According to the latest data, there are nearly 12,000 open jobs in Leon County according to JobsEQ as compared to roughly 5,400 people unemployed as reported by BLS in December 2021.

But the pandemic has transformed the mindset of the American worker. Many have moved, some want to continue remote work, and many no longer want to work in the job or industry they had prior to the pandemic. With so many Americans unemployed and out of the workforce and so many businesses looking to hire, economists call the phenomenon slowing the job market recovery a “mismatch”—a disconnect between the jobs open and the people looking for work.

Adding to the mismatch is data from the National Skills Coalition that suggests that 52 percent of jobs require skills training beyond a high school diploma. But too few of America's workers—43 percent—have access to the skills training necessary to fill these in-demand careers.

Beyond the bigger employment picture, economic developers, elected officials, educational institutions, and workforce training providers must understand the story the county-level occupation data is currently telling in order to be able to provide job opportunities for residents while ensuring a skilled, reliable workforce for employers.

The charts and tables on the following pages represent the current workforce and talent outlook for Tallahassee-Leon County.

OCCUPATION OVERVIEW »

Figure 16 provides the county's mix of occupations based on a four-quarter average of the most recent data. Also included are the five-year historical change in employment and the ten-year projected change in employment. This offers a high-level glimpse into the numbers employed, wages, and future demand for each sector in the county.

FIGURE 13: OCCUPATION SNAPSHOT

SOC	Occupation	Employed	Mean Annual Wages	LQ	Unemployment Rate	Online Job Ads	Five-Year History Annual Change	Ten-Year Forecast Total Demand	Ten-Year Forecast Annual Change	Ten-Year Forecast Annual % Change
43	Office & Administrative Support	21,849	\$37,800	1.12	5.2%	1,035	0.1%	23,216	-1,322	-0.6%
35	Food Prep & Serving Related	13,154	\$25,300	1.19	15.2%	849	-3.3%	23,985	830	0.6%
41	Sales & Related	13,047	\$38,800	0.89	7.9%	1,305	-1.7%	17,939	-354	-0.3%
13	Business Financial Operations	11,251	\$59,300	1.24	2.8%	1,035	1.7%	11,261	487	0.4%
25	Education, Instruction & Library	11,126	\$52,900	1.31	5.7%	262	-0.6%	10,358	366	0.3%
29	Healthcare Practitioners & Technical	10,328	\$78,200	1.13	2.2%	991	2.5%	6,947	901	0.8%
11	Management	9,307	\$95,800	0.90	2.8%	774	1.3%	8,189	392	0.4%
53	Transportation and Material Moving	7,742	\$33,500	0.59	8.9%	590	1.1%	10,103	132	0.2%
31	Healthcare Support	6,270	\$30,100	0.90	5.3%	264	2.7%	9,363	1,134	1.7%
33	Protective Service	6,128	\$45,500	1.85	3.5%	247	0.1%	5,503	-85	-0.1%
47	Construction & Extraction	5,870	\$41,500	0.82	8.7%	135	1.9%	6,670	137	0.2%
37	Building, Grounds Cleaning Maintenance	5,324	\$28,300	1.07	8.6%	254	-0.3%	7,389	284	0.5%
21	Community & Social Service	5,164	\$41,300	1.87	1.9%	322	0.2%	5,831	321	0.6%
49	Installation, Maintenance & Repair	5,066	\$43,000	0.86	6.0%	382	0.2%	5,086	64	0.1%
15	Computer & Mathematical	4,781	\$68,600	0.98	2.2%	1,047	1.6%	4,183	489	1.0%
39	Personal Care & Service	3,661	\$29,000	0.97	13.2%	128	-0.7%	5,819	224	0.6%

23	Legal	3,095	\$84,500	2.31	1.9%	110	0.7%	2,119	69	0.2%
51	Production	2,816	\$35,700	0.32	8.5%	125	0.4%	3,106	-121	-0.4%
27	Arts, Design, Entertainment Sports & Media	2,651	\$58,000	0.98	7.0%	151	-1.7%	2,892	9	0.0%
17	Architecture & Engineering	2,127	\$76,400	0.80	2.6%	103	0.2%	1,752	17	0.1%
19	Life, Physical & Social Science	2,015	\$56,000	1.42	3.1%	156	0.1%	2,016	49	0.2%
45	Farming, Fishing, & Forestry	293	\$36,200	0.28	7.9%	n/a	-5.1%	456	-6	-0.2%
Total – All Occupations		153,065	\$48,400	1.00	6.0%	10,267	0.1%	174,181	4,018	0.3%

The largest major occupation group in Leon County is Office and Administrative Support Occupations, which employs 21,849 workers. The next-largest occupation groups in the region are Food Preparation and Serving–Related Occupations (13,154) and Sales and Related Occupations (13,047).

The major groups with the highest LQs in the region are Legal Occupations (2.31), Community and Social Service Occupations (1.87), and Protective Service Occupations (1.85).

Occupation groups in Leon County with **the highest average wages per worker** are Management Occupations (\$95,800), Legal Occupations (\$84,500), and Healthcare Practitioners and Technical Occupations (\$78,200).

The **unemployment rate in the region** ranges among the major occupational groups, from 1.9 percent in Legal Occupations to 15.2 percent in Food Preparation and Serving–Related Occupations.

Over the next ten years, **the fastest growing occupation group** in Leon County is expected to be Healthcare Support Occupations, with a 1.7 percent annual growth rate. The **strongest forecasts by number of jobs** over this period are for Healthcare Support Occupations (+1,134) and Healthcare Practitioners and Technical Occupations (+901).

Over the same period, the **highest separation demand** (occupation demand due to retirements and workers moving to another occupation) is expected in Office and Administrative Support Occupations (24,537) and Food Preparation and Serving–Related Occupations (23,155).

FIGURE 14: UNEMPLOYMENT RATE 2019–2021

MONTH	UNEMPLOYMENT RATE	MONTH	UNEMPLOYMENT RATE
January 2019	3.4%	May 2020	8.2%
February 2019	3.3%	June 2020	8.4%
March 2019	3.2%	July 2020	7.8%
April 2019	3.2%	August 2020	6.7%
May 2019	3.2%	September 2020	5.6%
June 2019	3.2%	October 2020	4.7%
July 2019	3.3%	November 2020	4.2%
August 2019	3.3%	December 2020	4.0%
September 2019	3.3%	January 2021	4.1%
October 2019	3.1%	February 2021	4.4%
November 2019	3.0%	March 2021	4.6%
December 2019	3.1%	April 2021	4.8%
January 2020	3.7%	May 2021	4.8%
February 2020	4.7%	June 2021	4.8%
March 2020	6.1%	July 2021	4.7%
April 2020	7.4%	August 2021	4.6%

Before the pandemic began, Leon County had low unemployment, high labor force participation rates, and a steady, stable economy led by Public Administration and Education. The Service and Retail sectors, much like the rest of the nation, took a major downturn at the start of the pandemic. Unemployment jumped to 6.1 percent in March 2020, and in June 2020 reached its highest level at 8.4 percent. While it has slightly increased from December 2020's 4.0 percent low, Leon County's unemployment rate is currently 4.6 percent, which is lower than both that of the state (5.0 percent) and the nation (5.2 percent).

FIGURE 15: JOB OPENINGS SNAPSHOT

TOTAL JOB POSTS	OCCUPATIONS	EMPLOYERS	CERTIFICATIONS	HARD SKILLS	SOFT SKILLS	JOB TITLES	EDUCATION LEVELS	PROGRAMS
10,893	523	2,632	275	1,187	106	8,235	5	256

Source: Jobs EQ®.

Comparing job openings to unemployment rates tells an important story in the occupational gaps in the market. According to the latest data, the unemployment rate in Leon County is 4.6 percent, which represents more than 7,300 people looking for work. As shown in Figure 17, though, there are almost 11,000 job openings in the county (more than 5,075 of which are full-time).

FIGURE 16: TOP TEN OCCUPATIONS BY JOB OPENINGS

SOC	Occupation	Total Ads
41-2031.00	Retail Salespersons	512
29-1141.00	Registered Nurses	359
13-2011.00	Accountants and Auditors	347
41-1011.00	First-Line Supervisors of Retail Sales Workers	346
43-4051.00	Customer Service Representatives	251
15-1252.00	Software Developers	236
43-6014.00	Secretaries, Administrative Assistants, Except Legal, Medical & Executive	234
15-1232.00	Computer User Support Specialists	230
21-1093.00	Social and Human Service Assistants	229
35-3023.00	Fast Food and Counter Workers	229

FIGURE 17: HOUSEHOLD INCOME

	Leon County	Florida	U.S.
Less than \$10,000	9.2%	6.5%	6.0%
\$10,000 to \$14,999	4.6%	4.3%	4.3%
\$15,000 to \$24,999	9.6%	9.9%	8.9%
\$25,000 to \$34,999	10.3%	10.3%	8.9%
\$35,000 to \$49,999	13.5%	13.9%	12.3%
\$50,000 to \$74,999	17.2%	18.3%	17.2%
\$75,000 to \$99,999	12.2%	12.4%	12.7%
\$100,000 to \$149,999	12.6%	13.1%	15.1%
\$150,000 to \$199,999	5.2%	5.3%	6.8%
\$200,000 or more	5.7%	6.0%	7.7%
Median Income	\$53,106	\$55,660	\$62,843
Mean Income	\$75,693	\$80,286	\$88,607

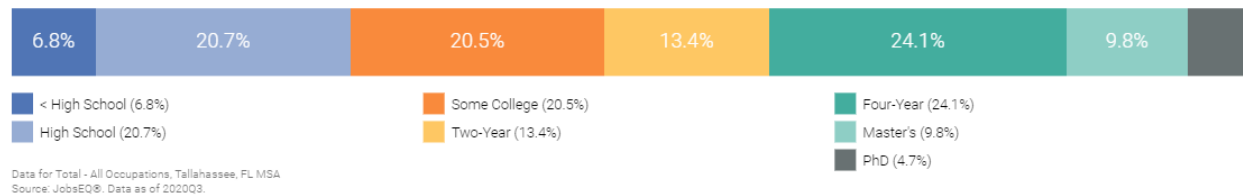
Source: Jobs EQ® – American Community Survey 2015–2019

WORKFORCE & INDUSTRY ALIGNMENT »

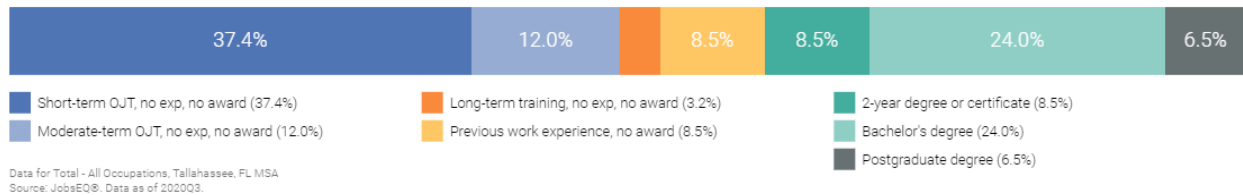
The site selection review process often includes a review of the region's workforce. Comparing the Tallahassee MSA labor force's educational attainment to the current industry education and training requirements shows that 39 percent of jobs in the MSA require a two-year certificate/degree or higher, and 52 percent of the population holds a two-year certificate/degree or higher. This indicates a distinct advantage in existing talent for organizations trying to expand and attract high-skilled jobs.

FIGURE 18: MSA WORKFORCE & INDUSTRY ALIGNMENT

Educational Attainment :



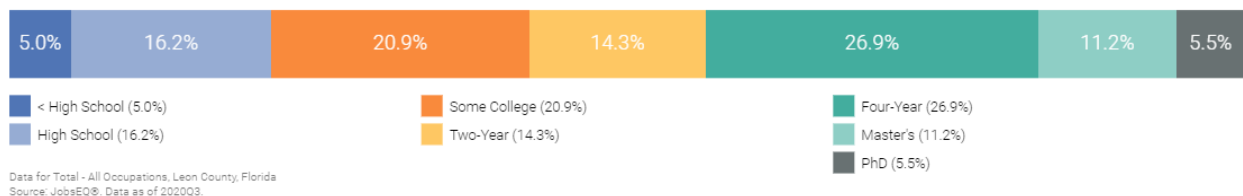
Education and Training Requirements :



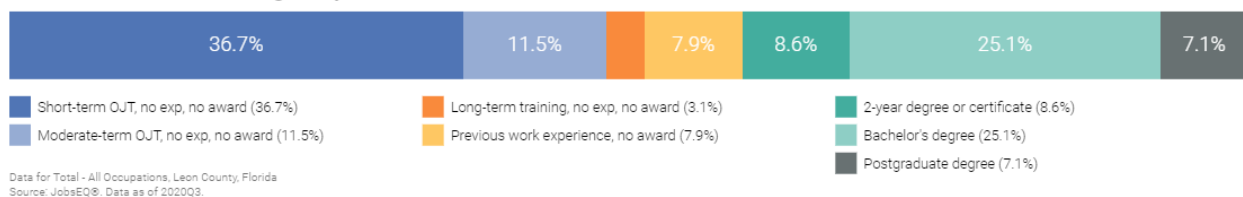
Comparing the Tallahassee-Leon County labor force's educational attainment to the current industry education and training requirements shows that 40.8 percent of jobs in the county require a two-year certificate/degree or higher, and 57.9 percent of the population has a two-year certificate/degree or higher.

FIGURE 19: LEON COUNTY WORKFORCE & INDUSTRY ALIGNMENT

Educational Attainment :



Education and Training Requirements :



Occupational growth rates across the county are expected to increase overall. There are several reasons the occupation mix for a specific industry might decline or increase, including:

- **Technology and production methods** – The introduction of new tools, automation, and technology can reduce the need for or replace workers. Advanced technology can bring new and often higher-paying jobs for individuals with more technical skills.
- **Outsourcing and organization** – As companies grow or restructure, contract workers often fill specific occupations, limiting employment growth within a company.
- **Replacing services or products** – Consumer preferences for products and services change over time, impacting employment for the associated occupations.

Demand also changes when workers exit the labor force or transfer to another industry sector. Figure 23 compares forecasted total demand growth with projected supply, revealing either a need or a surplus of workers in occupations over the next ten years (the “annual supply gap”).

- For example, when a region has an occupation that is expected to grow quickly but the educational requirements for the occupation do not match the educational attainment of residents, there is a high potential for an occupation shortfall (negative red number).
- Slow-growing or declining occupations due to factors such as automation or technology, as well as increasing supply, result in potential saturation (positive green number) in the market.

With automation and technology saturating many industries, the county needs to prepare for this wave of change and upskill residents to meet future needs. The biggest barriers to workers upskilling are lack of awareness around training opportunities, low financial aid availability, or an inability to afford to take time off. When conducted on-site and in partnership with the employer, reskilling is more attainable and provides more long-term benefits.

FIGURE 20: MSA POTENTIAL AVERAGE ANNUAL OCCUPATION GAP AND DEMANDS OVER TEN YEARS

SOC	Occupation	Projected Annual Supply Gap	Actual 2021 Employment	Total Annual Demand Forecast	Projected 2031 Employment	Accumulated 2031 Demand	Average Wages
29-1000	Healthcare Diagnosing or Treating Practitioners	-65	6,770	404	7,377	2,914	\$97,200
13-1000	Business Operations Specialists	-44	7,548	802	8,025	5,166	\$59,300

15-1200	Computer Occupations	-37	3,682	317	4,073	2,079	\$75,100
11-9000	Other Management Occupations	-24	3,257	279	3,455	1,921	\$91,400
25-1000	Postsecondary Teachers	-16	3,284	290	3,413	1,945	\$76,700
11-3000	Operations Specialties Managers	-15	1,708	154	1,841	1,047	\$98,300
29-2000	Health Technologists & Technicians	-13	1,249	94	1,360	662	\$52,500
21-1000	Counselors, Social Workers, and Other Community and Social Service Specialists	-13	3,740	399	3,952	2,773	\$43,400
13-2000	Financial Specialists	-13	3,274	293	3,329	2,007	\$59,700
11-1000	Top Executives	-13	2,807	241	2,848	1,666	\$107,100
25-9000	Other Education Instruction, Library Occupations	-9	1,906	166	1,931	1,140	\$39,400
17-2000	Engineers	-6	1,308	97	1,325	689	\$91,000
11-2000	Advertising, Marketing, Promotions, Public Relations, & Sales Managers	-4	638	60	669	410	\$114,800
25-2000	Preschool, Elementary, Middle, Secondary, & Special Education Teachers	-4	3,385	281	3,499	1,973	\$48,300
15-2000	Mathematical Science Occupations	-4	244	25	303	159	\$61,500
27-3000	Media & Communication Workers	-2	935	100	942	635	\$61,800

19-3000	Social Scientists & Related Workers	-2	494	44	508	284	\$65,600
17-3000	Drafters, Engineering Technicians, & Mapping Technicians	-2	602	59	600	378	\$51,000
27-2000	Entertainers & Performers, Sports & Related Workers	-1	429	59	458	346	\$67,800
19-5000	Occupational Health & Safety Specialists & Technicians	-1	102	6	103	42	\$54,200
25-4000	Librarians, Curators, & Archivists	-1	207	22	214	144	\$50,500
33-3000	Law Enforcement Workers	-1	211	15	209	137	\$24,900
17-1000	Architects, Surveyors, & Cartographers	-1	190	14	190	102	\$66,700
21-2000	Religious Workers	-1	558	70	591	458	\$44,200
41-4000	Sales Representatives, Wholesale & Manufacturing	-1	156	18	166	116	\$79,800
23-1000	Lawyers, Judges, & Related Workers	-1	2,058	98	2,072	721	\$103,200
19-4000	Life, Physical, & Social Science Technicians	-1	493	59	512	382	\$42,100
41-3000	Sales Representatives, Services	-1	280	28	290	192	\$89,300
19-1000	Life Scientists	-1	476	45	482	301	\$60,000
19-2000	Physical Scientists	-1	459	49	465	301	\$57,100
31-2000	Occupational Therapy & Physical Therapist	-1	135	21	170	126	\$62,700

	Assistants & Aides						
43-4000	Information & Record Clerks	0	123	13	115	89	\$33,400
29-9000	Other Healthcare Practitioners & Technical Occupations	0	38	3	44	19	\$47,400
45-2000	Agricultural Workers	0	57	8	57	50	\$37,600
43-9000	Other Office & Administrative Support Workers	0	15	2	14	12	\$45,500
39-4000	Funeral Service Workers	0	23	3	22	19	\$52,000
27-1000	Art & Design Workers	0	468	45	447	288	\$60,700
53-2000	Air Transportation Workers	0	33	3	33	22	\$155,500
49-2000	Electrical, Electronic Equipment Mechanics, Installers, & Repairers	0	24	2	25	17	\$55,100
41-9000	Other Sales & Related Workers	0	29	4	32	22	\$108,600
49-9000	Other Installation, Maintenance, & Repair Occupations	0	50	6	53	33	\$48,800
27-4000	Media & Communication Equipment Workers	0	92	10	99	65	\$49,200
25-3000	Other Teachers & Instructors	+1	1,063	127	1,105	822	\$44,700
23-2000	Legal Support Workers	+4	942	105	998	690	\$47,900

Note: Only occupations that require a two-year degree or higher are included.

Educational Awards »

While there are projected occupation gaps, Tallahassee-Leon County has a host of educational institutions supplying the talent pipeline, especially in high-demand fields.

FIGURE 21: EDUCATIONAL AWARDS BY SCHOOL

Institution Name	Certificates and Two-Year Awards	Four-Year Awards	Post-Graduate Awards	Total Awards	Total School Enrollment	Average Net Price
Florida State University	159	9,821	3,121	13,101	42,450	\$12,568
Tallahassee Community College	3,617	19	0	3,636	11,683	\$3,686
Florida A&M University	30	1,520	616	2,166	9,626	\$14,610
Lively Technical College	437	0	0	437	1,279	\$11,392
Total	4,243	11,360	3,737	19,340		

Data as of the 2019-2020 academic year unless noted otherwise; related occupation data as of 2021Q1. Average Net Price data as of the 2017-2018 academic year. Figures may not sum due to rounding.

The challenge, as is generally the case in college towns, is retaining that talent after certificate or degree completion. Talent retention begins with workforce and education providers demonstrating to residents and nontraditional students opportunities for further education and training.

While there are a host of organizations and nonprofits in Tallahassee that focus on offering basic training to lower-income residents, the conversation must also include upskilling opportunities that provide a pathway forward—not only as a means of retaining new graduates, but also to recruit alumni back and to market low-cost career training opportunities to current residents.

Regardless of the community, it is often noted that while many technical colleges, community colleges, and workforce entities offer programs to those that are unemployed or underemployed, participation rates are low. This is often a result of opportunity costs, class times, and lack of marketing to target audiences. While OEV does not own this issue, to support employer demands it must play a role in advocating for and facilitating change.

Optimizing Product

A critical component of economic development success is offering competitive products—specifically in the form of developed sites and buildings that can house new, relocating, or expanding businesses. Regardless of how much time OEV devotes to building a strong talent pipeline or a proactive approach and process, if that is not paired with aggressive product development, the chance of transformative growth will be limited.

A sound product development strategy first takes stock of what is currently available, understanding its strengths and limitations so that specific tactics can be adopted that will address the varying needs. The evaluation of a site varies from one industry segment to another. But there is one attribute that translates across all segments: limited risk. From site control to infrastructure demands, for a prospect, everything is defined in terms of risk. Limiting that risk and providing as much certainty as possible should be the driving force behind a product development strategy.

VisionFirst Advisors assessed the community's inventory of industrial sites as would be done in a site-selection process, with a keen eye to both perceived and actual risk. In conducting the product assessment, VisionFirst combined in-person visits with significant desktop research.

Doing so revealed several common property themes, which were then assessed to gain an understanding as to what impacts Tallahassee-Leon County's competitiveness. Figure 25 highlights where the community has a competitive advantage as well as where opportunities exist to improve the community's ability to compete.

FIGURE 22: SITES & BUILDING COMPETITIVENESS RANKING

RANKING	DETAIL
Competitive Advantage	Airport Gateway project and the ability to connect downtown and Innovation Park to the airport.
Competitive Advantage	Interstate 10 logistical advantage.
Competitive Disadvantage	Lack of available parcels surrounding airport; airport properties are for lease only due to FAA regulations inside the fence.
Competitive Disadvantage	Limited number of sites for Advanced Manufacturing targets.
Needs Improvement	Lack of sites under control of local government.
Needs Improvement	Limited available buildings.
Needs Improvement	No developed sites to take advantage of Class 1 rail and interstate access.

VisionFirst conducted a desktop review of available sites and buildings included in the current OEV database – as a site selector would do on an initial search. From there, more than a dozen sites including available properties within Innovation Park and the airport, were identified that offer the most opportunity for an industrial project within the community's targeted industries.

Each review identified attributes and opportunities should be utilized to further market and enhance the sites to increase the project pipeline and overall competitiveness. OEV should work with the landowners to improve the site competitiveness and highlight those properties on the website for ease of viewing and search engine optimization.

The review of Tallahassee's sites and buildings uncovered several key takeaways:

- There is a limited number of sites for several of the community's target sectors, such as Manufacturing and Transportation/Logistics, despite interstate access. This would be seen as a serious challenge by site selectors and corporate real estate professionals.
- Product development opportunities will arise because of the Airport Gateway project and increasing connectivity to the universities.
- Connecting resources and assets (e.g., innovation, commercialization, research) to the airport should be a priority.
- Positioning the available sites and buildings on OEV's website is critical to making them accessible for prospects conducting desktop research.

OEV should implement several short-term recommendations:

- **Ensure any relevant search presents OEV as the lead organization.** Refine search engine optimization to ensure OEV is the top result for queries such as "Tallahassee economic development" or "Leon County economic development".
- **Establish easy site search navigation.** Viewing a sites and buildings database and comparing data should be intuitive. Consider enabling the Find Properties link to open in a new tab to eliminate the need for the second-most-used navigation feature: the back button.
- **Highlight the best product.** A general search of the existing database displays 744 properties. Do not rely on prospects to create filters that will eliminate commercial and retail to show only industrial property. Develop a landing page with top sites that match targeted industry sectors.

SWOT Analysis & Leverage Points

Based on conversations with stakeholders and in-depth labor and industry research, VisionFirst has identified Tallahassee-Leon County's strengths, weaknesses, opportunities, and threats regarding the community's economic development efforts as well as the area's overall competitiveness. This analysis is an evaluation of the overall economic development climate, not solely the efforts of OEV, and was based heavily on qualitative input and industry knowledge.

STRENGTHS

- OEV has a strong funding source and a dedicated staff.
- There are benefits of being associated with the state capitol.
- Multiple higher education partners and providers, including the FAMU-FSU College of Engineering, are important community assets.
- The region has good interstate access and logistics infrastructure.
- There are abundant recreational and natural amenities as well as strong placemaking efforts.

WEAKNESSES

- There are challenges with working in a highly-regulated environment.
- There is some disconnect with business leadership.
- Leon County has a lack of available sites and developable land.
- The economy is heavily reliant on the Public Administration, Education, and Service sectors.
- The manufacturing industry has experienced utility and permitting struggles.

OPPORTUNITIES

- There are research capacity opportunities with the universities.
- The Amazon project raises the local profile.
- Public-private partnerships can be formed at the airport.
- Opportunities exist with Innovation Park and the wet lab space (EDA grant).
- Continued expansion with OEV's MWSBE programs is crucial.
- The many economy-building initiatives taking place could be highlighted.

THREATS

- Perceived lack of value for existing Manufacturing industry could inhibit future growth.
- There is confusion around the use and purpose of Blueprint funds.
- Time utilization and committee operations challenges inhibit progress.
- Lack of a unified vision to optimize strategic assets can hinder success.
- Lack of collaboration to achieve common goals can hold the community back from potential growth.



Leverage Points »

SWOT analyses are often conducted for discovery purpose only. VisionFirst goes beyond the initial analysis and develops strategies to leverage or capitalize on each strength or opportunity and to minimize or mitigate weaknesses and threats. These strategies, or “leverage points”, help illustrate the timeliest, most important actions for the county to execute to strengthen its position, achieve its mission, and move the community to a greater competitive stance for jobs and investment.

Strength	Leverage Point
Multiple higher education partners and providers, including the FAMU-FSU College of Engineering, are important community assets.	Utilize programs at both FSU and FAMU to attract and retain talent and highlight research assets as part of recruitment efforts to demonstrate the available talent pipeline, especially for target industries. Connect airport to FSU/FAMU Engineering and the MagLab through Innovation Park.
Weakness	Leverage Point
Leon County has a lack of available sites and developable land.	Continue to leverage and promote the available sites, but also partner with surrounding counties to promote their sites, as Tallahassee-Leon County will see benefits in regional wins.
Opportunity	Leverage Point
The many economy-building initiatives taking place could be highlighted.	Tallahassee-Leon County has a host of entities with a focus on economy building. While OEV may not be the lead on those initiatives, it must highlight them and demonstrate the collaborative nature of the community.
Threat	Leverage Point
Time utilization and working within a government-only structure present challenge.	Streamline processes and procedures to enable staff to focus on business recruitment, retention, and expansion efforts.

