



**ECONOMIC
DEVELOPMENT
STUDY
FOR
THE LACOCHEE AREA
OF
PASCO COUNTY,
FLORIDA**

PREPARED FOR:



February, 2015

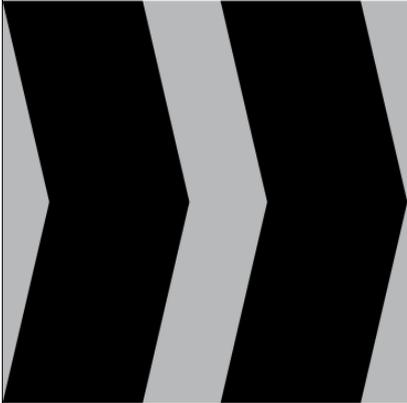
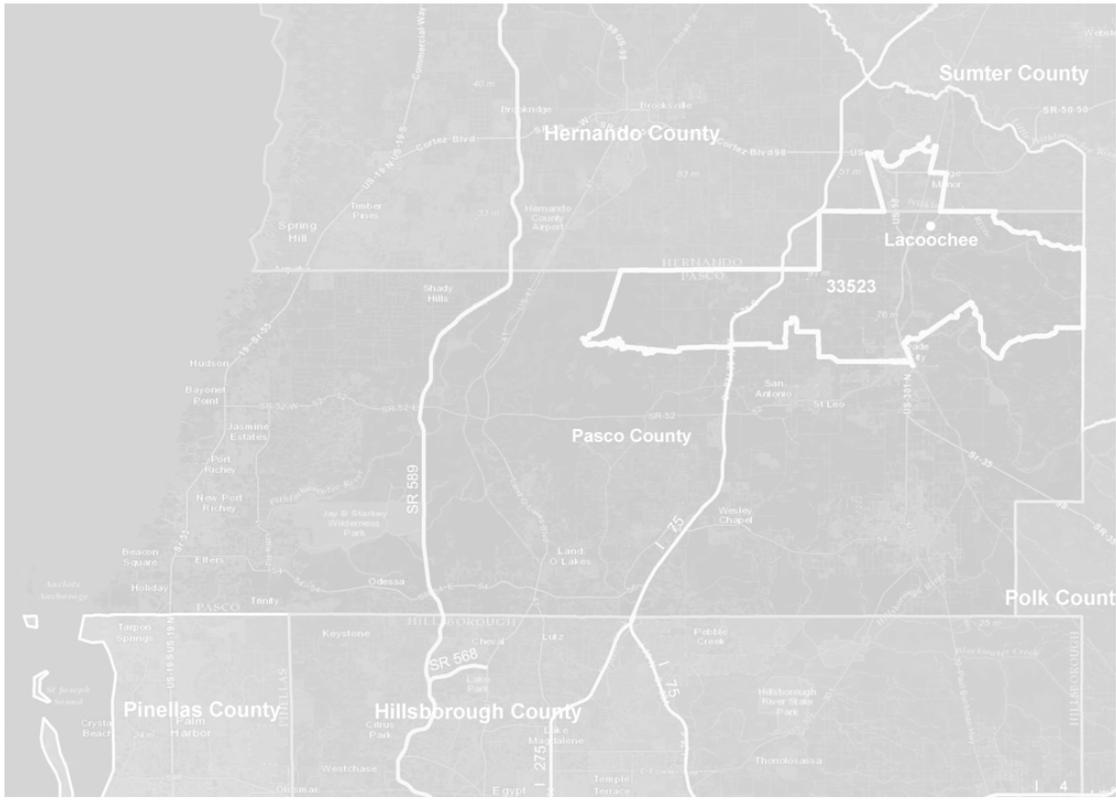
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BUILDING A FOUNDATION FOR THE FUTURE

TABLE OF CONTENTS

Subject	Page
EXECUTIVE SUMMARY	I-III
INTRODUCTION	1-2
CONTEXT	3-9
Global, National and State Factors Important to Future Economic Development	3
Changes in Manufacturing	4
Factors Associated with Local Plans	4
1. The Adopted County Economic Development Plan	5
2. The Adopted Lacoochee-Trilby Strategic Plan	6
CURRENT ECONOMIC PROFILE & CONDITIONS	10-14
Demographics	10
Primary Rural Industry	13
ADDITIONAL ECONOMIC ANALYSES	15-26
Primary Real Estate Patterns	15
Cluster Analysis Using Gap or Comparative Assessment Methodology	16
1. Cluster Analysis at Zip Code Level	17
2. County Level Cluster Analysis	18
3. Zip Code and County Cluster Analysis Defined Opportunities	18
Retail Goods and Services Demand	19
Industrial Development	24
Agriculture & Natural Resource Evaluation	24
Transient Accommodations Evaluation	26
OPPORTUNITIES SYNOPSIS	27-28
Opportunities Synopsis	27
Land Use Change Indicated From Opportunities	27
THREE-TIERED STRATEGY	29-41
The Three Tier Strategy	29
Tier One	29
1.1. Re-entry of Second Chance Program	29
1.2. Additional Job Training	32
1.3. Peer-to-peer Vehicle Sharing Program	32
1.4. Famers' Market	33
1.5. The Lacoochee Community Center	35
Tier Two	36
2.1. Farmers' market - Expansion of Activity	36
2.2. Additional Agricultural Efforts	36
2.3. Apprenticeship Efforts	37
2.4. Tenant Recruitment	38
Tier Three	39
3.1. Creation of a Technical "Repair" Concentration	39
3.2. Additional Agricultural Efforts	39
3.3. Capitalization on R & D Opportunities	40
3.4. Agri-tourism, Agri-education & Expansion of Natural Resource Tourism	40
Strategy Synopsis	40
APPENDIX	1A-13A



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

An economic development study of the Tri-Community Area (Lacoochee, Trilby and Trilacoochee) was conducted by The Chesapeake Group, Inc. under contract to Pasco County, with funding provided by The United States Department of Housing and Urban Development's Choice Neighborhood Planning Grant. The sole purpose and intent of the study was to provide guidance for economic development and related land use planning for the Tri-Community Area.

The Chesapeake Group developed the following analysis and strategy based on information gathered through a variety of methods, including: interviews with stakeholders; a survey of area residents; area reconnaissance; a review of the available secondary data; a review of Pasco County's Economic Development Plan, the 2009 plan for the Lacoochee area and other related documents; independent research; proprietary computer modeling; and the experience and expertise of The Chesapeake Group's principals involved with the effort.

The following is a synopsis of key findings and recommendations associated with the economic development study of the Tri-Community Area.

External and Internal Factors Impacting Opportunities

There are external factors that impact opportunities for the Tri-Community Area. Due to changes in the national demographic composition, the Tri-Community Area now more closely resembles the country and much of Florida than it did in the past. Technological change in manufacturing, including but not limited to additive manufacturing/3D printing and technology application in distribution, provides new opportunities in the present and the future that did not previously exist.

The adopted Pasco County Economic Development Plan (Economic Development Plan) and the adopted Lacoochee-Trilby Strategic Plan (Strategic Plan) provide insight into the community's desires. The Chesapeake Group's recommendations were made to complement, as well as to further enhance and define, those existing plans.

Current Lacoochee Area Conditions

The Tri-Community Area is rural in character and has a relatively small population. Furthermore, there has been a decline in population in Lacoochee area while

much of Pasco County and elsewhere in the Tampa region has grown substantially.

One of the primary industries both within the Tri-Community Area and surrounding areas is agriculture.

Average reported household incomes are relatively low, which diminishes purchasing power. Residential property values are also low. As a result, there is greater potential for property values to rise in the future than for values to go significantly lower.



Additional Analyses

To identify a full range of opportunities, additional analyses were performed.

The **Cluster Analysis** identified market gaps or potential opportunities. These include a full range of manufacturing and wholesaling/distribution activities, medical services, a wide range of personal and business services, and a limited range of retail. The retail component is unlikely to develop without substantial changes in the economic vitality of the market.

Demand Forecasting Analysis indicated that there are basically two markets for retail goods and related services. Lacoochee is small in terms of dollars spent. As a result no modern retail operations of any type are supportable from the residents. The Tri-Community Area market is larger and can support certain retail. However, the competition and competitive advantages associated with Dade City to tap that market leads to the conclusion that the greater population is unlikely to support new retail in the Tri-Community area in the foreseeable future without a substantial influx of new residents or a major increase in employment.

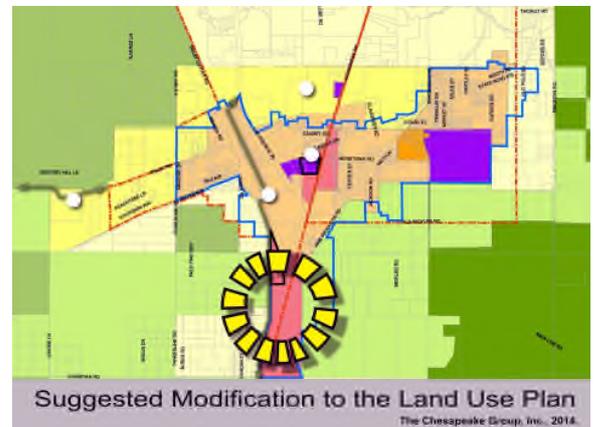
Current zoning, plans and land use strategies potentially focuses any new industrial activity on 200 or more acres of land located both within and just north of the study area in the adjacent county. Of that land, slightly less than one-half of the acreage can be described as "shovel ready," with the required "public" services and infrastructure needed to easily accommodate a range of "industrial" activity. The

existing and proposed industrial areas have the capacity to employ between 1,870 to 3,740 people, based on the type of industry. This exceeds the available labor pool in the Tri-Community Area.

A **Research and Development (R & D)** evaluation conducted for the Tri-Community Area shows that there are areas that continue to have potential. These include industries associated with: fruits and vegetables; animal husbandry/poultry; indigenous species such as woodland animals, snakes, bees, and cane toads; indigenous and migratory bird species; indigenous fish species; invasive aquatic plants; and fresh water limnology.

Indicated Land Use Change

Based on the defined opportunities, as well as niches within those opportunities, it is suggested that the adopted plan be revised to designate a section of the land along US 301 for "Office/Service and Compatible Technology Driven Manufacturing" or "Innovation District."



Three-Tiered Strategy and Implementation Goals

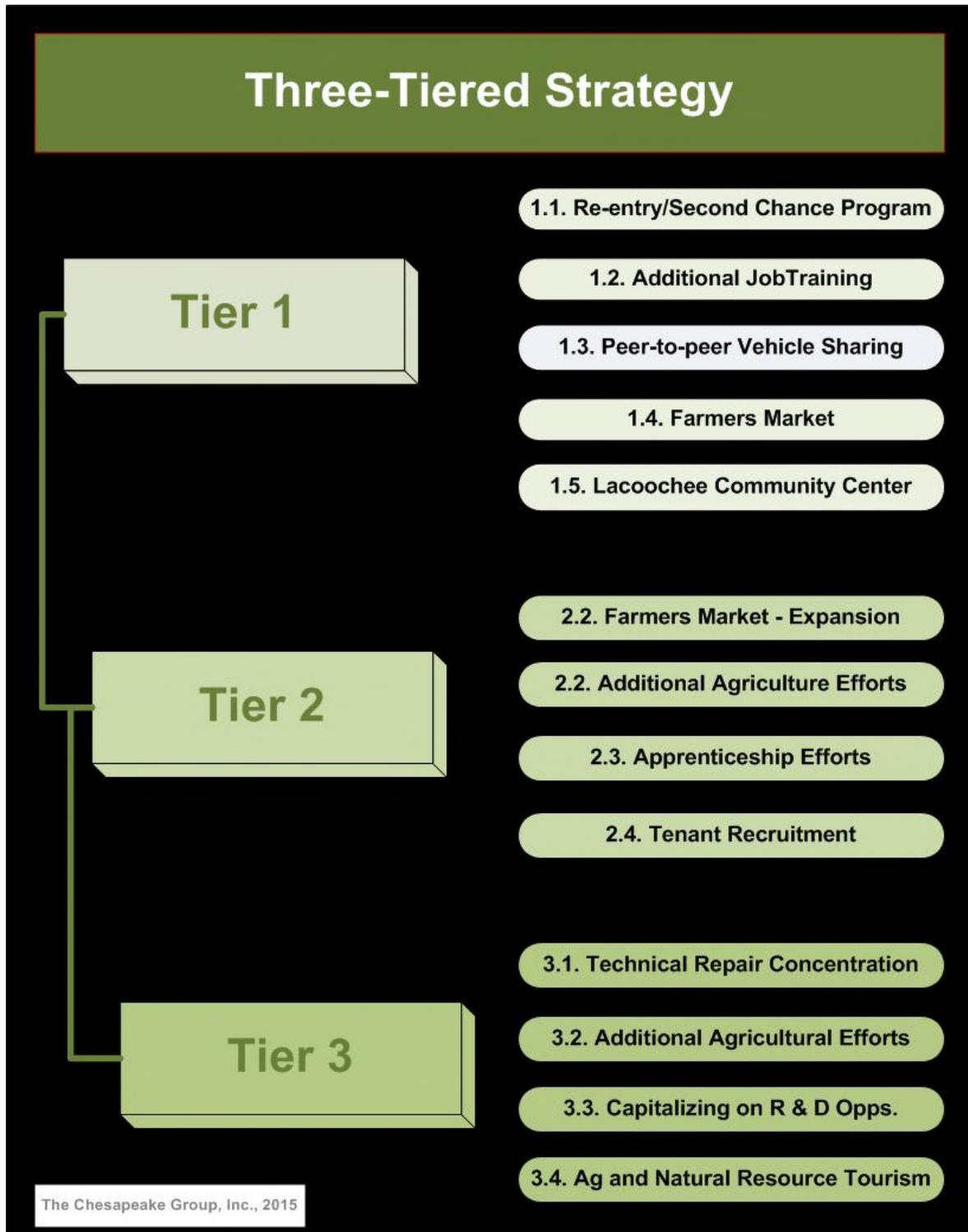
Successful economic development efforts in the Tri-Community Area must reverse the trends that currently exist and directly benefit the existing residents. These four overall goals are essential:

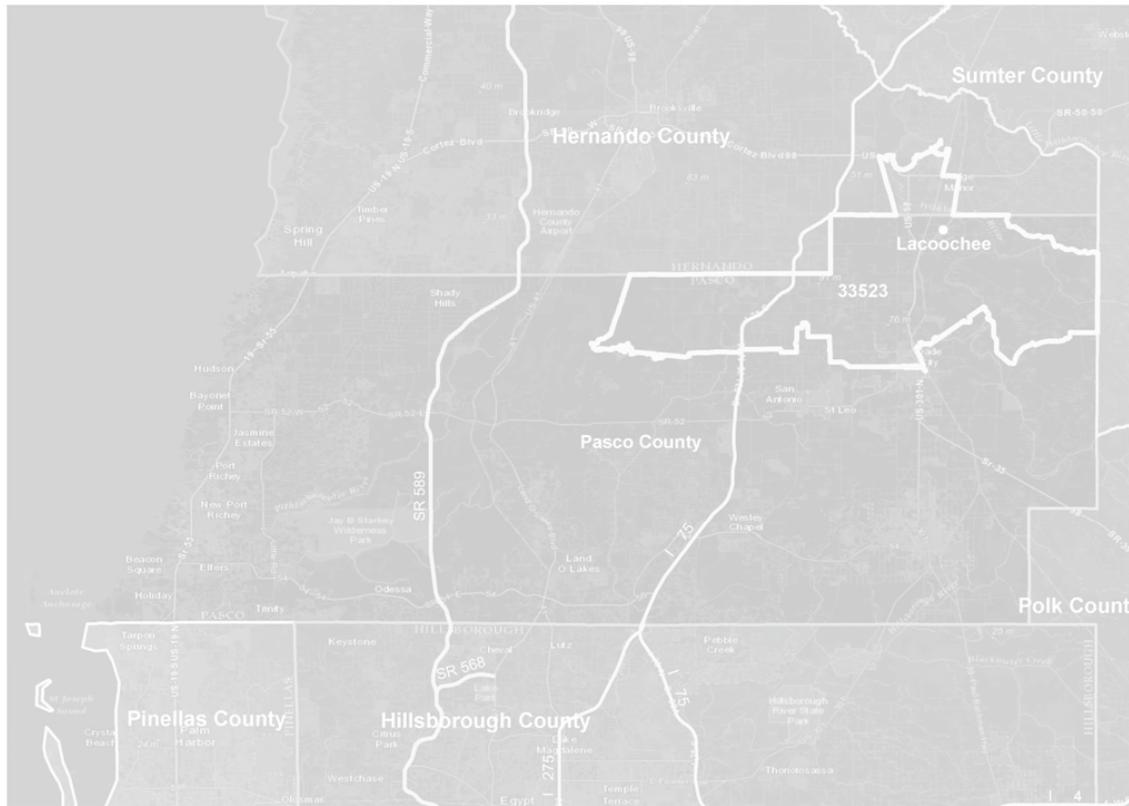
1. Incorporate current residents into the future economic structure and opportunities, raising the level of human capital in the immediate area.
2. Efficiently and effectively utilize the infrastructure investments that have already been made by both the public and private sector.

- 3. Seek private sector activity and investment for designated developable land.
- 4. Maintain the rural character and identity of the area while expanding activity and enhancing the economic productivity of agriculture on lands designated for that use.

To accomplish these, a multi-tiered approach and related activities are required. There are existing resources which can be brought to bear on some actions immediately. Other strategies have a longer timeframe or are dependent upon the completion of another element or program component before they can proceed.

The proposed implementation elements are found in the following graphic.





INTRODUCTION

INTRODUCTION

The following is an economic development study of the Tri-Community Area conducted by The Chesapeake Group, Inc. under contract to Pasco County, Florida. Funding for the effort was provided by The United States Department of Housing and Urban Development's Choice Neighborhood Planning Grant Program.

The study identifies existing conditions, contains the analyses appropriate to define economic opportunities, defines the opportunities shown to be sustainable, and, finally, provides the methods to move forward and seize these opportunities. The sole purpose and intent is to provide guidance for economic development and related land use planning for the Tri-Community Area (Lacoochee, Trilby, and Trilacoochee) of Pasco County.

Methodology and Analysis

The analysis and strategy is based on data and information gathered through the following:

- ◇ Interviews with stakeholders.
- ◇ A survey of area residents.
- ◇ Area reconnaissance.
- ◇ Review of available secondary data.
- ◇ Review of Pasco County's Economic Development Plan, the 2009 plan for the Lacoochee area and other related documents.
- ◇ Independent research.
- ◇ Proprietary computer modeling.
- ◇ Experience and expertise of The Chesapeake Group's principals involved with the effort.

All of the estimates of potential that are defined in the analyses are conservative in nature and tend to understate the demand and related activity. The estimates and suggested activities are based on conservative assumptions for the markets potentially served and represent only The Chesapeake Group's opinion based on the analyses and experiences of the organization.

Economic Opportunities

Based on the analyses, there are substantial economic opportunities for the Tri-Community Area. The opportunities include:

- ◇ A full range of manufacturing and wholesale/distribution activity.
- ◇ Medical services.
- ◇ A wide range of personal and business services.
- ◇ A limited range of retail, which is unlikely to develop without substantial changes in the economic vitality of the market.
- ◇ Agricultural value-added activity.
- ◇ Research and Development opportunities associated with the area's natural resources and agricultural production.

Goals for the Successful Implementation of the Strategy

Based on the current conditions and the analyses conducted, the study established four goals that are essential to successful economic development efforts in the Tri-Community Area. The following goals will reverse the trends that currently exist and directly benefit the existing residents:

1. **Incorporate current residents** into the future economic structure and opportunities, raising the level of human capital.
2. Efficiently and effectively **utilize infrastructure investments** which have already been made by both the public and private sector.
3. **Seek private sector activity** and investment for designated developable land.
4. **Maintain the rural character** and identity of the area while expanding economic activity and enhancing the economic productivity of agriculture on lands designated for agricultural.

Three-Tiered Strategy for Development

This plan identifies a three-tier strategy for activities to effectuate enhanced economic activity in the Tri-Community Area. Within each tier, there are actions that can be taken to seize opportunities and accomplish the four defined goals. The actions are listed in order; the earlier actions are often linked to or required to be completed before the later actions can proceed.

Thank you

The Chesapeake Group, Inc. is truly thankful to David Lambert, Chairman of the Pasco County Housing Authority Board of Commissioners, and Ted Schrader, Chairman of the Board of County Commissioners, for their support of this initiative.

Special thanks also to those people and entities that follow. All have contributed insights, questions, and important comments which helped ensure the success of this project.

Senator Bill Nelson

US Department of Housing and Urban Development and HUD teams

US Department of Agriculture

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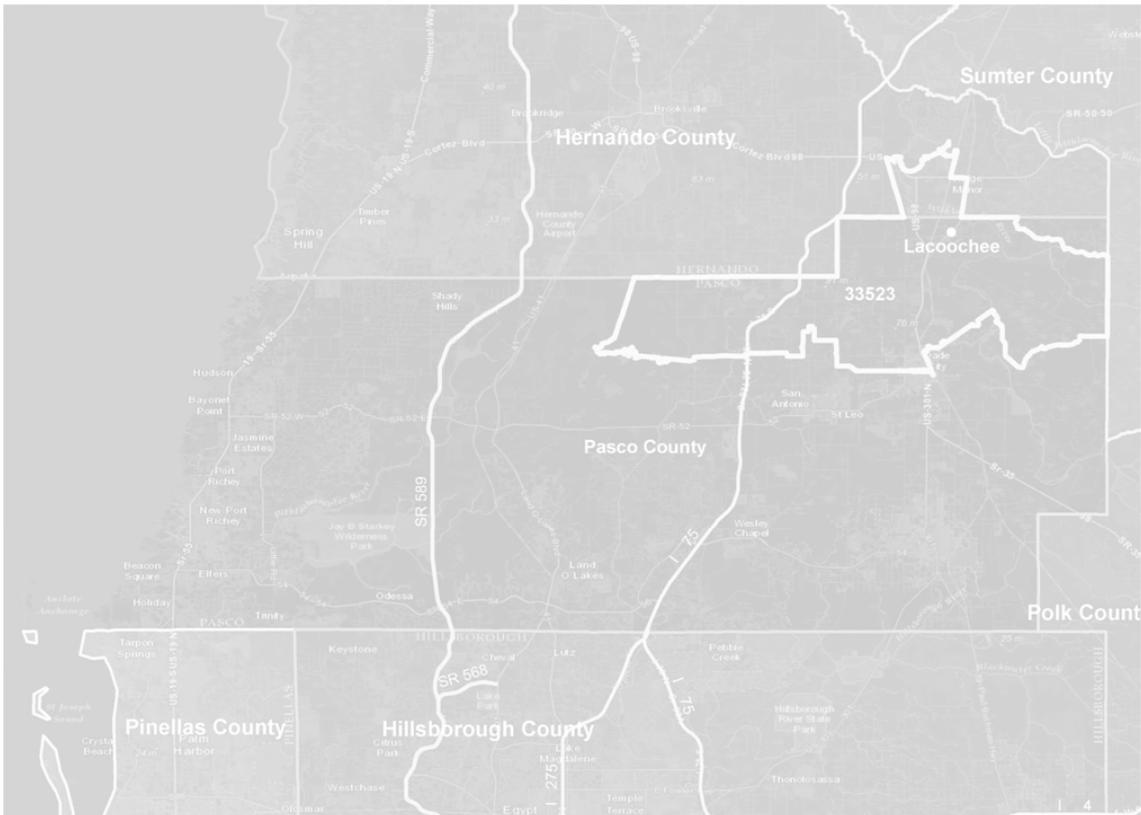
Lacoochee Elementary School

Withlacoochee River Electric Cooperative (WREC)

Lacoochee-Trilby-Trilacoochee Steering Committee

Lewis Abraham Boys and Girls Club

Business and Community Leaders



CONTEXT

CONTEXT

No community exists within a vacuum. Economic development must consider both external and internal factors that play roles in current and future opportunities. The defined factors that follow impact the potential for economic development in the Tri-Community Area (Lacoochee, Trilby and Trilacoochee).

Global, National and State Factors Important to Future Economic Development

There are demographic and other changes within the United States, Florida and the global economy that impact the opportunities and the future for the Tri-Community Area. These include but are not limited to the following:

- ◇ Birth and fertility rates have fallen to the lowest level in the history of the country, resulting in fewer numbers of youth and less future household creation.
- ◇ The marriage rates are also at the lowest level in the country's history and continue to decline. The traditional two parents with two children household is now a minority of the population in general and will become even a smaller segment in the future.
- ◇ The average age of residents in the United States continues to increase, impacting the current and future labor force, housing needs, and other segments of the economy.
- ◇ The country's population continues to diversify in terms of origin, ethnicity, race and other related factors. From a composition perspective, the United States now and in the future will more closely resemble the Tri-community Area than it has in the past.
- ◇ Both the Baby Boomers households (between the ages of 50 and 68) and younger adult households (between the ages of 21 and 30) are seeking different housing options, greater mobility and different environments than have past generations. While some seek a more intense urban environment, growing numbers seek rural settings with employment opportunity.
- ◇ The two fastest growing components of the population, both the Baby Boomers households (between the ages of 50 and 68) and younger adult households (between the ages of 21 and 30) are increasingly seeking and participating in passive and other recreational activity.
- ◇ Baby Boomers have been a substantial market force for the past fifteen years. However, their importance in the commercial and residential markets will dwindle in the next ten to fifteen years as they continue to age.
- ◇ An aging population will likely increase the demand for office space and related services in various professional areas, such as health care, while diminishing demand in others.

According to published Population Reference Bureau reports, there are roughly 76.4 million Baby Boomers in the United States in 2014. From 1946 to 1964, which are the years of birth associated with the Baby Boomers, there were 76 million born. Of these, roughly 11 million have died, resulting in roughly 65.2 million survivors. The number of residents associated with the ages of the Baby Boomers has increased due to immigration to the United States, as the number of immigrants in this age range has outweighed the number that has died. The Baby Boomers are now between the ages of 50 and 68.

In addition, and as a result of medical advances and lifestyle changes, there is a large segment of the population living well into their seventies and eighties. There are an estimated 27.8 million people living in the United States who are 70 or older. Collectively, the Baby Boomers combined with the population that is 70 or older represent about one-third of the total population in the country. According to a recently published study by the Joint Center for Housing Studies at Harvard University, the number of households headed by someone at least 70 years of age will grow by 42% between 2015 and 2025; and the actual number of these households will jump by 8.3 million.

Changes in Manufacturing

Changes in manufacturing and other trends within the United States, Florida and the global economy will impact the opportunities and the future for the Tri-Community Area of Pasco County. They include but are not limited to the following:

- ◇ Manufacturing is changing significantly through **changing technology, technology application and the introduction of new materials**. The changing technology diminishes the importance of labor as a cost factor and increases the importance of transportation relative to other cost factors. Therefore, for many products, production facilities located in population centers or adjacent areas will have a competitive advantage in the future. This could be important for both production and distribution opportunities in the Tri-Community Area because of its proximity to both Tampa and Orlando.
- ◇ The technological change in manufacturing will result in the return of the production of many products to the United States. Manufacturing is likely to expand rapidly in the next ten years, which could provide local opportunities.
- ◇ Manufacturing changes, such as on-demand production through additive manufacturing/3D printing, will impact retail and related space in significant ways in the future, resulting in lower retail space demand. The amount of supportable space in the Tri-Community Area and elsewhere is likely to diminish as a result.
- ◇ The trend among big box stores and other retailers to fulfill online orders from stores versus warehouses could adversely impact retail opportunities in the Tri-Community Area. This counters the need for lower inventories on-site, as a result of increased on-demand production and the expansion of internet sales.

Changing manufacturing processes and technology opens opportunities that did not previously exist.

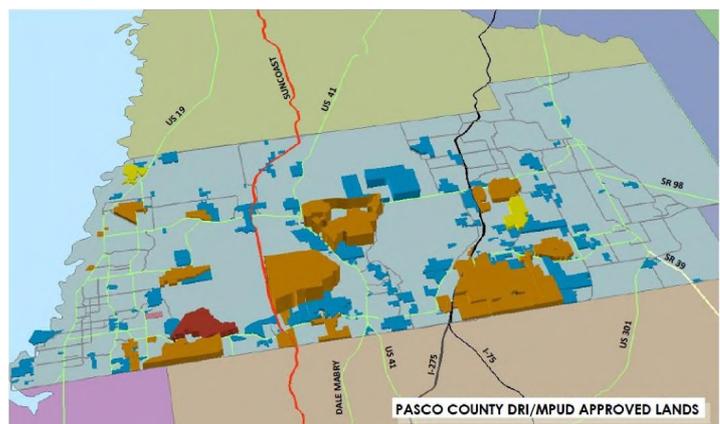
Factors Associated with Local Plans

An economic development strategy for a sub-area of a larger jurisdiction must be compatible with the larger jurisdiction's Economic Development Plan, and it must also be compatible with the comprehensive plans for the larger area and sub-areas. In creating the economic development strategy for the Tri-Community Area, The Chesapeake Group took into consideration Pasco County's adopted Economic Development Plan and the sub-area plan for the Lacochee-Trilby Strategic Planning Area.

1. The Adopted County Economic Development Plan (Economic Development Plan)

Pasco County's adopted Economic Development Plan states the following:

- ◇ Pasco County is a diverse and rapidly growing mix of communities having both unique characteristics and opportunities for growth. Pasco County has changed, emerging from a bedroom community for the rest of Tampa Bay to a thriving center for business and commerce. The quality of life and a supportive environment for business have helped Pasco become one of the fastest growing counties in the entire country.
- ◇ Pasco County has outpaced the rest of the Florida in terms of new employers and employment opportunities and is recognized as a leader for small business and entrepreneurial growth. Pasco County's economic prosperity is based on the ability to leverage the assets of location, competitively priced and available land, skilled employment sectors, business incentives and a government committed to prosperous, high-quality and balanced growth.
- ◇ The County Seat is Dade City to the immediate south of the Tri-Community Area, connected by US 301. Dade City, along with the Villages of St. Leo and San Antonio and the City of Zephyrhills, has developed appealing small towns, a slower pace, and acres of nature that is just far enough away from the larger communities of Tampa and others to be attractive. The primary north-south connector for commerce and industry is US 301.
- ◇ The United States Department of Commerce estimated that in 2010 Pasco County had 184,865 people employed, of which 94,089 worked within the County. Nearly 90,000 commuted to other counties, with the majority commuting to Hillsborough and Pinellas Counties. The State of Florida estimated at the end of 2009, Pasco's employers had nearly 131,000 employees; while approximately 37,000 commuted into Pasco for their jobs from surrounding counties. Therefore, Pasco's resident workforce (those that live and work in Pasco) could theoretically remain in Pasco instead of commuting to other jurisdictions, provided the jobs equal to those in surrounding counties.
- ◇ Three of five counties in the Tampa Bay Region (Hernando, Hillsborough, Citrus, Pinellas, & Pasco) saw average household incomes fall between 2000 and 2010. Pasco County was one of only two counties that saw improved average household incomes. Pasco County had the largest percentage increase in household incomes of all Florida counties at 20%.
- ◇ In 2011, the average wage for a County resident was \$33,344. The highest paid jobs were Federal civilian workers (\$91,200), Management of companies (\$82,200), Utilities (\$81,900) and Manufacturing (\$52,000). Generally, jurisdictions aim to attract jobs with wages that exceed 125% of average wage. For Pasco County that is roughly \$42,000 annually.
- ◇ Pasco is defined as being "well positioned" at the center of the Tampa Bay growth corridors of US 19, US 41, the Suncoast Parkway, I-75 and US 301. With its supply of entitled greenfield sites and supporting infrastructure, Pasco County will continue to attract a large proportion of Tampa Bay's business growth. This growth is a reflection of a continuing expansion of the region.



- ◇ About one-half of all office space was added in the period between 2000 and 2010. Prior to 2000, average annual office space absorption rates generally ranged from 75,000 to 140,000 square feet per year. However, it increased to over 300,000 square feet between 2000 and 2010. At the end of 2011, the County had an estimated total of 6.8 million square feet of office space. Pasco County had only 38 square feet of office space per job compared to the 60 to 72 square feet for other bench-marked counties.
- ◇ In 2011, Pasco County had about 12 million square feet of industrial space. Pasco County also experienced significantly less industrial space per job when compared to the benchmarked counties, with 89 square feet per job, compared to 130-137 square feet for benchmarked counties.
- ◇ The targeted industries for future efforts are associated with three sectors: Leading Edge Development; Transportation Centers; and Sustainable Resources.
 - The Leading Edge Development Sector is associated with intellectual property, the development of new ideas, and bringing technologies into the marketplace (R & D).
 - The Transportation Centers Sector growth is dependent upon the need by large companies to locate transportation distribution centers as a cost-effective means to transport goods from producer to consumer.
 - The Sustainable Resources Sector recognizes the opportunity to create jobs through the restoration of brownfields, creating opportunity on land located near rural, conservation or environmental preservation areas. This sector also includes restoring and preserving the environment by enhancing cultural and recreational areas.

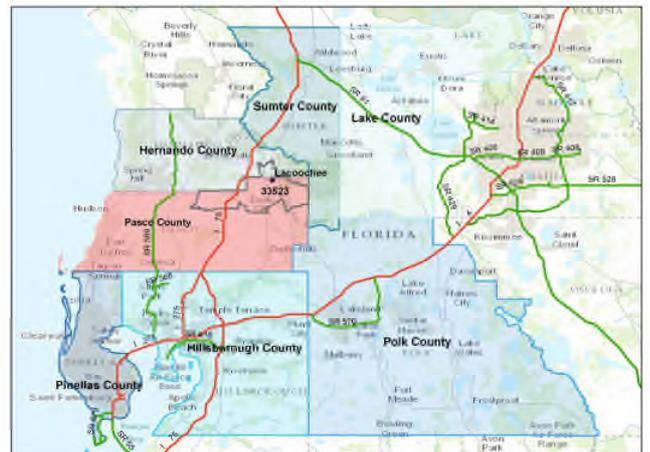
2. The Adopted Lacoochee-Trilby Strategic Plan (Strategic Plan)

The program for economic development must be placed within the context of the adopted area plans. The Lacoochee-Trilby Strategic Planning Area is a 2.5 square-mile area consisting of three communities: Lacoochee, Trilby, and Trilacoochee. The area, located in the northeast section of Pasco County, is defined in this analysis as the Tri-Community Area.

The area is distinguished by scenic views of agricultural and rural landscapes. The plan for this Tri-Community Area was developed through a community participation process in 2009. The Lacoochee-Trilby Strategic Master Plan was designed to address three primary goals:

- ◇ The formulation of economic development strategies to create local jobs.
- ◇ The adoption of long-term "neighborhood revitalization" visions.
- ◇ The identification of key infrastructure and capital improvements projects.

The planning process involved significant public participation to define the study area and its attributes. Existing conditions were discussed and analyzed in terms of the communities' assets, issues and opportunities. This information was further refined into goals, objectives and strategies for public improvements, transportation enhancements, redevelopment activities and future land use composition.



The Lacoochee-Trilby Strategic Master Plan recognized that the communities' current and future conditions are closely associated with both its historical and regional context. Trilby was once Pasco County's largest city. Its growth can be attributed to the railroad along with enterprising real estate marketing, which attracted national attention. In 1925, a fire destroyed much of the town. Subsequently, the town lost the train station depot and other commerce. Historical documents state that Lacoochee initially prospered by growing strawberries and orange groves, as well as running turpentine stills. The "Big Freeze" of 1898 completely wiped out the orange trees.

The development and opening of the Cummer sawmill in 1922 was considered to be town's economic foundation. The electrified sawmill and box factory was the largest of its kind in the South. At one time the mill had the largest payroll in the County. Along with the plant, company office, commissary, hotel, and doctor's office, the area prospered with new homes, businesses, a post office, etc. Available labor became a problem during the World War II, and the mill operation was eventually closed. It reopened and functioned as a plywood mill between 1960 and 1964. The location currently is a multi-acre industrially-zoned area.

Lacoochee is a Census-Designated Place (CDP). During the 1990s, Pasco County grew in population by 23%; while the Lacoochee-Trilby area lost 35% of its population.

The Lacoochee-Trilby Strategic Master Plan consists of six principal elements and subsequent recommended actions and goals related to: Circulation and Mobility; Economic Development; Infrastructure and Utilities; Rural, Recreational and Environmental Lands; Community Facilities; and Future Land Use and Community Identity.

The **Circulation and Mobility** element states that alternative and improved transportation linkages will play a key role in connecting the communities internally and externally to others. The document identifies a hierarchy of connector roads and related recommended improvements, including:

- ◇ Streetscape improvements along the primary corridor of US 301 such as landscaping, trees, new signage, traffic calming, effective alignments and access management.
- ◇ A variety of improvements to the rural arterial roadways of US Hwy 98 and SR 575, including traffic signalization at key intersections. The plan also recommended that the County address truck traffic impacting SR 575 and the possible need for a truck route realignment.
- ◇ A number of alternative improvements for the neighborhood connectors of Cummer and Trilby Roads.

At the time of the Plan's development the potential of SunRail service remained and was seen as a possible economic advantage. The plan also recognized, with or without SunRail, the presence of rail lines through the community presents opportunities as well as problems.

The Plan projects a safe, efficient and accessible public transportation system that ensures adequate access for all community members to local and regional businesses and employment centers.

The Plan reports that throughout the process residents and stakeholders identified **Economic Development** as fundamental to community development. The Plan notes four related principles:

- ◇ Economic diversification for increased job creation.
- ◇ Workforce development and training.
- ◇ Improved investment image.
- ◇ Organization and financing.

Additional opportunities presented related to various types of increased tourism, including eco, heritage, sports and agri-tourism and the development of mixed-use neighborhood village centers.

The **Workforce Development and Training** section of the Plan calls for maximizing opportunities to retain and attract businesses, expand training and mentorship opportunities, and increase job accessibility for residents. The Plan further recommends that Pasco County concentrate initial efforts on attracting commercial and industrial establishments related to the key assets of the Lacoochee Industrial Park and the Withlacoochee Trail.

The primary concern of **Infrastructure and Utilities** was the need for improved water and sewer. A majority of residents depend upon wells and private septic tanks; the Plan recommends that the County work with Dade City and Hernando County on the development of long-range solutions for potable water and sewer needs.

Chapter 4, **Rural, Recreational and Environmental Lands**, argues for the preservation of the rural character of the area and the provision of recreational activities. Specific recommendations include but are not limited to:

- ◇ Planning tools and requirements which protect agricultural lands.
- ◇ Identification of potential brownfields and restoration efforts.
- ◇ Protection against industrial uses on conservation areas.
- ◇ Ensure that County green policies are implemented.
- ◇ Work with local residents to enhance park use.
- ◇ Expand recreational programs throughout the area.
- ◇ Promote eco-tourism and maintain trail connections.

In the **Community Facilities and Services** chapter, residents identified a collection of items that they desired, including:

Resource center	Grocery store
Business incubator	Neighborhood retail
Health care center	Restaurants
Community meeting space	

Additional recommendations include strengthening relationships with the Pasco County School Board and improving access to health care, day care and counseling services through strategic partnerships with faith-based organizations, non-profit agencies, community organizations, and private health service providers.

The Plan established the Lacoochee-Trilby Strategic Planning Area's future **Land Use and Community Identity**. It identifies two mixed-use village centers to promote walkable, sustainable communities with a sense of place, as follows:

- ◇ Trilby Village
 - Location: Properties fronting Trilby Road between US Hwy 98 and Beaver Road.
 - Recommended Uses: Neighborhood oriented historic mixed-use center with retail, local restaurants, convenience stores, post-office, church, trailhead, and other residential uses.
- ◇ Lacoochee Point
 - Location: Properties fronting SR 575 between Market Road and Bower Road.
 - Recommended Uses: Create a mixed-use focal point for Lacoochee residents building upon the existing Post Office facility and retrofitting other historic structures, to include a post office, neighborhood retail, local restaurants, convenience stores, eco-tourism outfitters.

It was anticipated that agricultural activity would continue to surround the traditional villages with infill housing and adaptive reuse helping to revitalize the older neighborhoods. Additionally, new industrial uses would be located on existing industrial sites.

The plan also recommended that the County continue the implementation of the Northeast County Rural Area plan and develop new design standards for existing view sheds and open spaces.



CURRENT LACOOCHEE & TRI COMMUNITY AREA ECONOMIC PROFILE & CONDITIONS

CURRENT ECONOMIC PROFILE & CONDITIONS

The United States 2010 Census and the most recent American Community Survey provide the most up-to-date demographics and rural industry figures available for the Lacoochee area. The following summarizes the available statistics pertinent to potential economic development.

Demographics

- ◇ The total population in Lacoochee was 1,714 in 2010. About 14% of the population was 60 years of age or older. About one-third (34%) of the population was between the ages of 15 and 39.

*Table 1 - Age of Lacoochee Area Residents**

Age Category	Percent
Under 5 years	10.2
5 to 9 years	10.2
10 to 14 years	11.1
15 to 19 years	8.6
20 to 24 years	6.8
25 to 29 years	5.7
30 to 34 years	6.6
35 to 39 years	6.5
40 to 44 years	6.7
45 to 49 years	5.1
50 to 54 years	5.2
55 to 59 years	3.8
60 to 64 years	4.6
65 to 69 years	3.3
70 to 74 years	2.2
75 to 79 years	1.8
80 to 84 years	1.2
85 years and over	0.7

*Based on US Census Bureau records.

- ◇ A total of 530 households lived in the area in 2010. About three-fourths of the households (77%) were families, and about four in ten (43%) had children under the age of 18.

*Table 2 - Total Households, Those Composed of Families and Those with Children Under 18**

Household Type	Number	Percent
Total households	530	100.0
Family households	410	77.4
With children under 18 years	230	43.4

*Based on US Census Bureau records.

- ◇ About four out of every ten households (43%) with families had two adults in the household raising children.

*Table 3 - Family Households and Those with Only Female Householders**

Characteristics of Household	Total	Percent
Husband-wife family	225	42.5
With own children under 18 years	123	23.2
Female householder	136	25.7

*Based on US Census Bureau records.

- ◇ Of the 530 occupied housing units in the Lacoochee area, 58% were owner-occupied.

*Table 4 - Owner and Renter Occupancy**

Occupied Housing Units	Total	Percent
Occupied housing units	530	100.0
Owner-occupied housing units	305	57.5
Renter-occupied housing units	225	42.5

*Based on US Census Bureau records.

- ◇ Four out of ten housing units were characterized as single-family detached. About 17% of all units were mobile homes.

*Table 5 - Character of Housing Units**

Housing Unit Characteristics	Percent
1-unit, detached	42.9%
2 units	20.2%
3 or 4 units	17.1%
20 or more units	2.6%
Mobile home	17.3%
Boat, RV, van, etc.	0.0%

*Based on US Census Bureau records, 2010 Census..

- ◇ According to the American Community Survey, which provides non-decade federal estimates for population and other statistics, The Lacoochee "Census Designated Place" had 103 vacant housing units in 2012.
- ◇ However and important from a market perspective, the zip code area of 33523, which extends to the south of Lacoochee to Dade City and slightly to the north beyond Pasco County, had an estimated 7,835 housing units with 6,632 occupied.

*Table 6 - 2008-2012 American Community Survey 5-Year Estimates**

HOUSING OCCUPANCY	Lacoochee CDP		ZCTA 33523	
	Estimate	Percent	Estimate	Percent
Total housing units	504	100%	7,835	100%
Occupied housing units	401	79.6%	6,632	84.6%
Vacant housing units	103	20.4%	1,203	15.4%

*Based on US Census Bureau records. American Community Survey..

- ◇ Roughly two-thirds of the owner-occupied housing units in the area had mortgages. About one-half of all households with mortgages paid between \$700 and \$1,000 a month. On the other hand, 42% paid between \$1,000 and \$1,500 monthly.

*Table 7 - Gross Mortgage Payments for Those with Monthly Payments**

Gross Monthly Mortgage Payment	Percent
\$300 to \$499	5.6%
\$700 to \$999	52.2%
\$1,000 to \$1,499	42.1%

*Based on US Census Bureau records.

About one-half of all households with mortgages paid between \$700 and \$1,000 monthly.

- ◇ There is a greater range of rent payments. About one-third of those who rent paid less than \$300 a month. More than four in ten paid between \$500 and \$750 monthly. About 6% spent more than \$1,000 monthly.

*Table 8 - Gross Rent for Those Having Rents**

Gross Rent	Percent
\$200 to \$299	32.2%
\$300 to \$499	7.0%
\$500 to \$749	43.5%
\$750 to \$999	11.3%
\$1,000 to \$1,499	6.1%

*Based on US Census Bureau records.

- ◇ Most households spend the majority of their income on three basic commodities irrespective of their income level; they are housing, food and transportation. The amounts and proportions spent vary with income levels.
- ◇ According to the federal government figures, about one-half of all households that rented their residence spent at least 30% of their income on rent.

*Table 9 - Gross Rent as a Percentage of Household Income**

Proportion of Income for Rent	Percent
Less than 15.0 percent	32.2%
15.0 to 19.9 percent	0.0%
20.0 to 24.9 percent	14.8%
25.0 to 29.9 percent	7.0%
30.0 to 34.9 percent	20.0%
35.0 percent or more	26.1%

*Based on US Census Bureau records.

- ◇ As would be expected, average incomes vary with education level. There are substantial differences in incomes for those that have not completed high school with those that have graduated or have some college education.

Table 10 - Median Earnings in Past Year for the Population 25 Years of Age or Older (2012 Dollars)

Characteristic	Income
Population 25 years and over with earnings	\$23,750
Less than high school graduate	\$14,412
High school graduate (includes equivalency)	\$31,537
Some college or associate's degree	\$28,304

*Based on US Census Bureau records.

- ◇ The number of people 16 years and over living in the area who are employed totaled 462. Over one-fourth of those employed was employed in service occupations.

Table 11 - Occupations for Those 16 Years of Age or Older*

Civilian Employed Population 16 Years and Over	Percent
Management, business, science, and arts occupations	23.8%
Service occupations	26.6%
Sales and office occupations	12.8%
Natural resources, construction, and maintenance occupations	25.3%
Production, transportation, and material moving occupations	11.5%

*Based on US Census Bureau records.

Primary Rural Industry

Agriculture is one of the most significant industries in the history of the country and one where the country continues to be dominant in both research and production. Much of the land in Pasco County and the Tri-Community Area historically has been and continues to be utilized for agricultural purposes.

The range in production in Pasco County and the Tri-Community Area is significant.

- ◇ Livestock and poultry are the highest value products sold.

Table 12 - Market Value of Agricultural Products in Pasco County*

Market Value of Agricultural Products Sold (\$1000)	Quantity	State Rank
Total value of agricultural products sold	73,859	30
Value of crops including nursery and greenhouse	29,864	35
Value of livestock, poultry, and their products	43,994	11

*Based on the Census of Agriculture.

- ◇ Fruits, nuts and berries are the highest sales volume for commodity groups.

Table 13 - Value of Sales by Commodity Groups in Pasco County*

VALUE OF SALES BY COMMODITY GROUP (\$1,000)	Quantity	State Rank
Vegetables, melons, potatoes, and sweet potatoes	303	47
Fruits, tree nuts, and berries	19,055	19
Nursery, greenhouse, floriculture, and sod	7,740	32
Other crops and hay	2,486	23
Milk from cows	3,730	18
Hogs and pigs	11	40
Sheep, goats, wool, mohair, and milk	100	14
Horses, ponies, mules, burros, and donkeys	563	17
Aquaculture	264	26
Other animals and other animal products	629	18

*Based on the Census of Agriculture.

- ◇ Calves and cattle are the primary livestock in Pasco County, while forage land for hay and other products is dominant in terms of acreage.

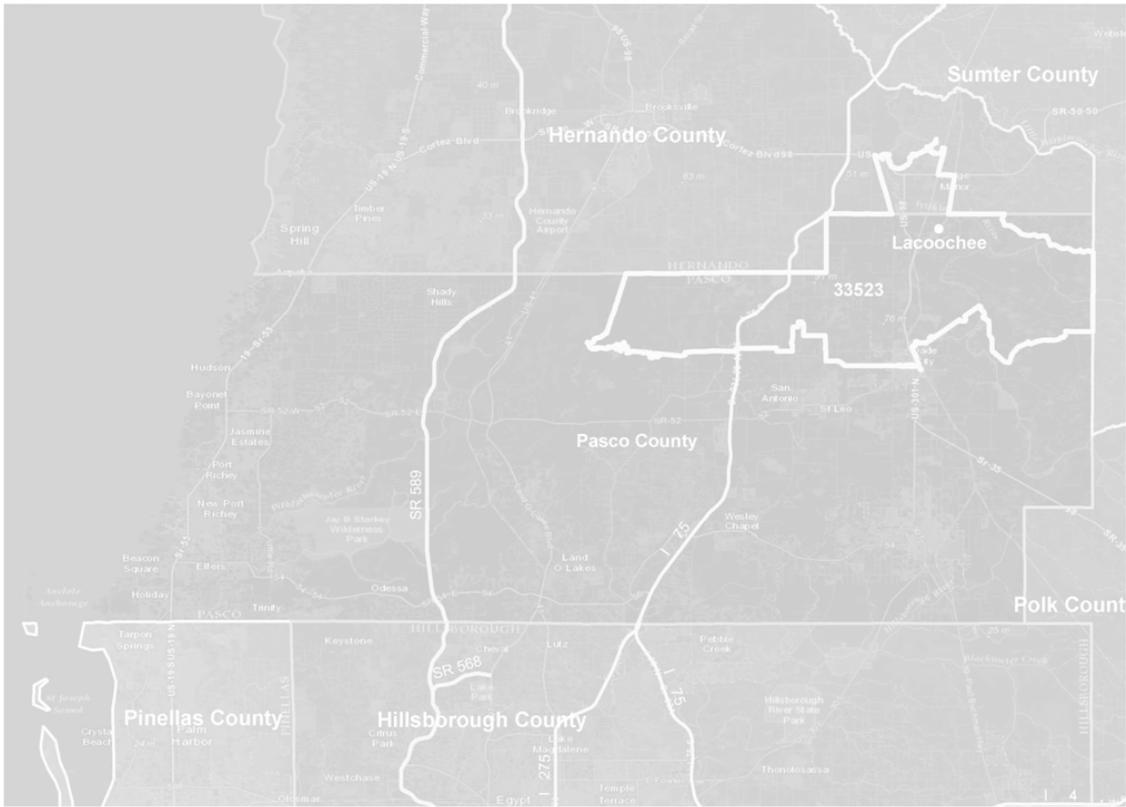
Table 14 - Crops and Livestock Inventories for Pasco County*

TOP CROP ITEMS (acres)	Quantity	State Rank
Forage-land used for all hay and haylage, grass silage, and greenchop	12,089	8
Oranges, all	5,560	18
Other oranges	4,178	14
Valencia oranges	1,383	19
Field and grass seed crops, all	1,230	4
TOP LIVESTOCK INVENTORY ITEMS (number)	Quantity	State Rank
Cattle and calves	30,953	20
Horses and ponies	2,008	15

*Based on the Census of Agriculture..

The rural, non-urbanized and non-village character is a defining factor for the Tri-Community Area. This pastoral charm makes the community different than other areas in the Tampa region that are urbanized to a greater extent. Quality of life has been linked to this rural character, with numerous studies defining quality of life as a key factor in business location decisions.

As recognized in the area's plan, the Tri-Community Area provides a distinct, pastoral atmosphere for businesses that might seek an alternative to other communities in the region. Increasing numbers of youth around the United States are seeking rural settings. In a sense, it is "another world," while still in close proximity to more urban communities. This rural charm has been the Tri-Community Area's trademark in the past, and potentially will be in its future. As was recognized in the Strategic Plan, this countryside rural appeal can be maintained through good design and land use planning while the community grows in economic vitality.



ADDITIONAL ECONOMIC ANALYSES

ADDITIONAL ECONOMIC ANALYSES

To provide a clear and expansive picture of the economic conditions and opportunities for the Tri-Community Area, additional analyses were undertaken.

Residential Real Estate Patterns

An analysis of "arms length" sales of residential properties in the primary zip code area, which encompasses Lacochee and other areas, indicates the following:

- ◇ Housing in the area is very moderately priced.
- ◇ Only a few of the units sold for figures approaching \$100,000.
- ◇ Many single-family units continue to sell below \$40,000.
- ◇ Mobile homes are often priced and sold at comparable figures to single-family homes.



From an investment perspective, there is greater potential for values to rise in the future than for values to go significantly lower.

There is greater potential for property values to rise in the future than for values to go significantly lower.

Table 15 - Arms Length Sales of Residential Property in Zip Code 33523 from 11/2011 through 8/2014*

Zip Code	Sale Date	Price	Size, SF	\$/SF	Type	Built	Lot
33523	11/9/2011	\$8,300	480	\$17	single family	1930	0.48 acres
33523	1/10/2012	\$94,374	1,125	\$84	single family	2012	8,925 sq ft
33523	2/20/2012	\$94,897	1,125	\$84	single family	2011	9,450 sq ft
33523	5/2/2012	\$100,000	1,156	\$87	single family	2003	9,615 sq ft
33523	7/23/2012	\$35,000	1,308	\$27	single family	1960	10,125 sq ft
33523	7/26/2012	\$10,000	684	\$15	mobile home	1971	5,997 sq ft
33523	7/30/2012	\$62,500	696	\$90	single family	1974	1.57 acres
33523	8/14/2012	\$14,000	840	\$17	single family	1967	0.49 acres
33523	11/15/2012	\$25,000	240	\$104	single family	2003	0.37 acres
33523	3/1/2013	\$44,000	728	\$60	mobile home	1986	4.75 acres
33523	4/8/2013	\$20,000	1,004	\$19	single family	1930	9,408 sq ft
33523	5/9/2013	\$21,000	1,296	\$16	mobile home	2003	0.5 acres
33523	6/27/2013	\$13,000	768	\$17	single family	1962	0.34 acres
33523	8/19/2013	\$2,000	784	\$3	single family	1986	0.25 acres
33523	8/29/2013	\$53,000	1,767	\$30	mobile home	1990	2.54 acres
33523	8/30/2013	\$95,784	1,125	\$85	single family	2012	8,925 sq ft
33523	9/20/2013	\$13,000	520	\$25	single family	1954	0.49 acres
33523	10/8/2013	\$35,299	1,292	\$27	single family	1975	1 acre
33523	11/26/2013	\$22,500	1,326	\$17	single family	1949	1.5 acres
33523	4/23/2014	\$35,000	528	\$66	mobile home	1972	0.37 acres
33523	5/7/2014	\$17,600	672	\$26	single family	1960	
33523	5/29/2014	\$65,000	1,080	\$60	Multi-family	1969	2.5 acres
33523	6/30/2014	\$95,000	1,125	\$84	single family	2013	8,925 sq ft
33523	8/6/2014	\$25,500	864	\$30	single family	1930	1.96 acres
33523	8/21/2014	\$25,000	768	\$32	single family	1973	2.5 acres

*Developed by The Chesapeake Group, Inc. 2014.

Cluster Analysis Using Gap or Comparative Assessment Methodology

One of a number of methods employed to define opportunities for the Tri-Community Area is a Cluster Analysis based on comparative or gap assessment methodology.

The United States Census Bureau provides annual information on Business Patterns throughout the nation in three different geographical formats. These are county, zip code, or Metropolitan Statistical Areas. This analysis includes assessments of local business patterns at both the zip code and larger county level. The identified business gaps defined in this process may or may not be appropriate opportunities for development in the Tri-Community Area because of the nature of operations, scale, or other factors.

It is noted that all population and household estimates upon which the comparisons were made were derived from the same source for comparability; it is the 2010 United States Census Bureau data. For consistency purposes, a single source, the United States Census Bureau's County Business Patterns, was employed to define the business structure and activity within all areas.

The North American Industry Classification System (NAICS) was introduced in 1997 as a more effective business classification system that identifies and groups establishments according to the activities in which they are primarily engaged. NAICS recognizes 1,170 different types of "industries" or establishments in twenty major industry sectors ranging from Agriculture (Sector 11) to Public Administration (Sector 92). This analysis examined and extracted data from all twenty sectors for this area, as follows:

- ◇ Agriculture, Forestry, Fishing and Hunting.
- ◇ Mining.
- ◇ Utilities.
- ◇ Construction.
- ◇ Manufacturing.
- ◇ Wholesale Trade.
- ◇ Retail Trade.
- ◇ Transportation.
- ◇ Information.
- ◇ Finance and Insurance.
- ◇ Real Estate, Rental and Leasing.
- ◇ Management of Companies and Enterprises.
- ◇ Administrative and Support, Waste Management and Remediation Services.
- ◇ Educational Services.
- ◇ Health Care and Social Assistance.
- ◇ Arts, Entertainment, and Recreation.
- ◇ Accommodation and Food Services.
- ◇ Public Administration.

1. Cluster Analysis at Zip Code Level

The initial cluster analysis compared the business structure of zip code tabulation area (ZCTA) 33523, which encompasses the Tri-Community Area, to that associated with other ZCTAs and communities that are similar. In determining communities for which the comparison can be made, the following criteria were used:

- ◇ The population size and household numbers had to be similar to those associated with the Tri-Community Area, since demand for many goods and services are ultimately dependent largely upon the size of the market served.
- ◇ The selected areas have median household incomes that are comparable to Tri-Community Area incomes.
- ◇ The selected communities are all located inland.
- ◇ Transportation and interstate highway access had to be similar.
- ◇ Consideration was also given to the rural character and a similar climate to the extent possible

There are essentially nine zip code areas that are similar using economic factors that are associated with 33523 (Dade City) zip code. They are:

27546, Lillington, NC
30540, Ellijay, GA
38261, Union City, TN
38478, Pulaski, TN
40361, Paris, KY
42134, Franklin, KY
46992, Wabash, IN
85901, Show Low, AZ
75180, Balch Springs, TX

Under-represented “industries” were then defined as those where the zip code area had a lesser number of businesses than at least seven of the other nine communities. Thus, the number of businesses compared to the other communities was below what might be expected. It is further noted that in some cases the under-represented industry differences are great, and in others the differences are smaller. Under-representation does not mean that the identified categories of businesses are necessarily desirable for Lacoochee.

The under-represented businesses at the zip code level are found in Table 1 in the Appendix.

2. County Level Cluster Analysis

To a large extent, the same criteria were employed to perform the cluster analysis at the county level; however, the analysis differed on two criteria. First, the county's location had to be part of a larger metropolitan area; and second, the similar county did not have to be inland. The following are identified as similar counties in terms of the economic factors:

Greenville Co., SC
Mobile Co., AL
Onondaga Co., NY
Lancaster Co., PA
Lucas Co., OH
Ramsey Co., MN
Lane Co., OR

Under-represented “industries” were then defined as those where Pasco County had a lesser number of businesses than at least six of the other seven counties. Thus, the number of businesses compared to the other communities was below what might be expected. The under-represented business activity at the county level is found in Table 2 in the Appendix.

3. Zip Code and County Cluster Analysis Defined Opportunities

The Cluster Analysis clearly indicates that there are potential voids or gaps at the county or local level in five major economic clusters. Highlights of each cluster follow.

Cluster 1 - A full range of manufacturing including but not limited to the following:

Fruit and Vegetable Canning	Pharmaceutical Preparation Manufacturing
Commercial Bakeries	Soap and Other Detergent Manufacturing
Cookie and Cracker Manufacturing	Glass Product Manufacturing Made of Purchased Glass
Apparel Accessories and Other Apparel Manufacturing	Cut Stone and Stone Product Manufacturing
Narrow Fabric Mills and Schiffli Machine Embroidery	Saw Blade and Hand tool Manufacturing
Textile Bag and Canvas Mills	Machine Shops
Corrugated and Solid Fiber Box Manufacturing	Precision Turned Product Manufacturing
Stationery Product Manufacturing	Bolt, Nut, Screw, Rivet, and Washer Manufacturing
Computer Terminal and Other Computer Peripheral Equipment Manufacturing	Manufacturing Instruments and Related Products
Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables
Printed Circuit Assembly (Electronic Assembly)	Mattress Manufacturing
	Surgical Appliance and Supplies Manufacturing
	Dental Equipment and Supplies Manufacturing

Cluster 2 - A full range of wholesaling/distribution activity including but not limited to the following:

Motor Vehicle Supplies and New Parts Merchant Wholesalers
Tire and Tube Merchant Wholesalers
Furniture Merchant Wholesalers
Home Furnishing Merchant Wholesalers

Potential business gaps include a full range of manufacturing, a full range of wholesaling/distribution activity, a range of medical services, a wide range of personal and business services and a range of retail.

Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
Roofing, Siding, and Insulation Material Merchant Wholesalers
Office Equipment Merchant Wholesalers
Computer and Computer Peripheral Equipment and Software Merchant Wholesalers
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers
Household Appliances, Electric Housewares, and Consumer Electronics Merchant Wholesalers

Refrigeration Equipment and Supplies Merchant Wholesalers
Industrial Machinery and Equipment Merchant Wholesalers
Packaged Frozen Food Merchant Wholesalers
Confectionery Merchant Wholesalers
Meat and Meat Product Merchant Wholesalers
Fresh Fruit and Vegetable Merchant Wholesalers
Grain and Field Bean Merchant Wholesalers
Plastics Materials and Basic Forms and Shapes Merchant Wholesalers
General Freight Trucking, Long-Distance, Less Than Truckload

Cluster 3 - A range of medical services including but not limited to the following:

Offices of Physicians, Mental Health Specialists
Offices of Dentists
Offices of Chiropractors
Offices of Optometrists
Offices of Mental Health Practitioners
Outpatient Mental Health and Substance Abuse Centers
Kidney Dialysis Centers

Ambulance Services
Hospitals
Residential Intellectual and Developmental Disability Facilities
Residential Mental Health and Substance Abuse Facilities
Continuing Care Retirement Communities
Services for the Elderly and Persons with Disabilities

Cluster 4 - A wide range of personal and business services including but not limited to the following:

Tax Preparation Services
Landscape Architectural Services
Engineering Services
Testing Laboratories
Process, Physical Distribution, and Logistics Consulting Services
Environmental Consulting Services
Temporary Help Services
Janitorial Services
Apprenticeship Training
Direct Mail Advertising
Telephone Answering Services

Mail-Order Houses
Vocational Rehabilitation Services
Child Day Care Services
Data Processing, Hosting, and Related Services
Food Service Contractors
Caterers
Consumer Electronics Repair and Maintenance
Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
Footwear and Leather Goods Repair
General Automotive Repair
Automotive Exhaust System Repair

Cluster 5 - A range of retail including but not limited to the following:

Automotive Parts and Accessories Stores
Furniture Stores
Outdoor Power Equipment Stores
Nursery, Garden Center, and Farm Supply Stores
Supermarkets & Other Grocery (except Convenience) Stores
Sporting Goods Stores
Hobby, Toy, and Game Stores
Sewing, Needlework, and Piece Goods Stores

Discount Department Stores
Used Merchandise Stores
Pet and Pet Supplies Stores
Drinking Places (Alcoholic Beverages)
Full-Service Restaurants
Limited-Service Restaurants

Once again, filling gaps in the Tri-Community Area with the businesses listed above may or may not be appropriate for many reasons, including a lack of demand. This is particularly true for retail activity.

Retail Goods and Services Demand

As previously defined in the Context, the current plan projected two mixed-use village centers, each having a retail goods and related services land use component. Therefore, retail potential was closely examined.

Total or aggregate retail sales figures represent a compilation of sales associated with ten major categories and the types of operations within those categories. The ten major categories of retail goods and related services are as follows:

- ◇ Food, such as groceries and related merchandise generally purchased for home preparation or consumption.
- ◇ Eating and drinking, consisting of prepared food and beverages generally consumed on the premises or carried to another location.
- ◇ General merchandise, including variety stores, department stores, and large value oriented retail operators.
- ◇ Furniture and accessories, including appliances and home furnishings.
- ◇ Transportation, including the sale of new and used automotive and other personal vehicles and parts.
- ◇ Drugstores, including those specializing in health and beauty aids or pharmaceuticals.
- ◇ Apparel and accessories.
- ◇ Hardware and building materials, including traditional hardware stores, garden centers and home improvement centers.
- ◇ Auto services, including gasoline and vehicle repair.
- ◇ Miscellaneous, including a plethora of retail goods and services ranging from florists to paper goods.

Many of today's better known retailers fall into more than one category. For example, many of the "big box" merchandisers, such as Walmart, often have traditional supermarket components within their operations.

A productivity level is the sales per square foot figure essential to pay all costs of operation and provide a reasonable return on investment. Sales productivity levels vary for each sub-category, type of business operation, or store-type. The productivity levels vary from low figures for bowling centers to thousands of dollars for others. Supportable space is derived by dividing the amount of sales by the appropriate productivity level. Both the spending patterns and productivity levels are likely to change over time.

Two markets were considered in the analysis for the development of retail goods and services; these are the households within Lacoochee and those within the larger zip code or Tri-Community Area.

In many markets, growth in households is often a critical factor. Unfortunately, neither of the markets has grown in the past; therefore, growth cannot be considered in the foreseeable or near future. On the other hand, there are ways that the markets could grow for retail, and each way is not mutually exclusive of the others.

Neither the Lacoochee or Tri-Community markets have grown.

The ways to expand the markets are as follows:

- ◇ Elevation of area incomes through higher levels of employment or higher pay.
- ◇ Substantial expansion of the number of households residing in the area.
- ◇ Substantial expansion of the employment base in the area, thereby creating a non-residential market component.

The analysis of demand for retail goods and services indicates that there is a fundamental reason for the lack of commercial services in Lacoochee at the present time. Simply, there is not enough spending by residents to support modern retail goods and related services operations.

As found in Table 16, the residents of Lacoochee spent about \$16.2 million on retail goods and related services at all locations in 2014. This is sufficient to support only 44,000 square feet of retail space in total. That is the amount of space that the residents of Lacoochee support at any and all locations, including shopping online or through catalogs, when on vacations, or at other locations both within and outside of Pasco County.

*Table 16 - Lacoochee Local Area Level of Retail Goods and Related Services Sales and Supportable Space**

Category	2014 Sales	2014 Space in Sq. Ft.
Food	\$3,957,000	7,389
Eat/Drink	1,475,000	3,688
General Merchandise	778,000	2,539
Furniture	233,000	717
Transportation	3,578,000	10,413
Drugstore	1,033,000	2,066
Apparel	776,000	2,414
Hardware	1,415,000	6,015
Vehicle Service	1,788,000	4,353
Miscellaneous	1,177,000	4,546
TOTAL	\$16,210,000	44,140

There is not enough spending by Lacoochee residents to support modern retail operations.

*Developed by The Chesapeake Group, Inc. 2014.

Table 17 actually illustrates the problem well. The aggregate figures found in Table 16 are actually composites of types of operations or sub-categories associated with each category. Essentially, the sales and supportable space associated with each type of operation is added together to form the category sales. Table 17 contains the retail goods and related services sales, and the square footage of space for 2014 supported by residents of the Lacoochee area by category and type of operation.

As can be seen in both Tables 16 and 17, Lacoochee residents spent roughly \$4 million on groceries and related merchandise at all stores. If all these dollars were spent at an operation within Lacoochee, the dollars would support only 7,400 square feet of space. This is a fraction of the amount of space associated with even an independent grocery operation. Modern chain supermarkets are between 30,000 to 40,000 square feet or more. This space is many times that which this community can support. This same scenario is true for all other types of operations defined in Table 17.

Table 17 - Lacombe Local Area Level of Retail Goods and Related Services Space and Supportable Space by Sub-category for 2014*

Sub-category	2014 Sales	2014 Space in Sq. Ft.
Food	3,957,000	7,389
Supermarkets	3,304,095	5,600
Independents	316,560	791
Bakeries	87,054	290
Dairies	51,441	143
Others	197,850	565
Eat/Drink	1,475,000	3,688
General Merchandise	778,000	2,539
Dept. Stores	275,412	918
Variety Stores	56,016	215
Jewelry	53,682	76
Sporting Goods/Toys	84,802	283
Discount Dept.	291,750	973
Antiques, etc.	3,890	17
Others	12,448	57
Furniture	233,000	717
Furniture	35,183	113
Home Furnishings	48,464	138
Store/Office Equip.	36,814	123
Music Instr./Supplies	10,019	50
Radios, TV, etc.	102,520	293
Transportation	3,578,000	10,413
New/Used Vehicles	1,252,300	3,131
Tires, Batt., Parts	1,577,898	5,260
Marine Sales/Rentals	189,634	513
Auto/Truck Rentals	558,168	1,509
Drugstore	1,033,000	2,066
Apparel	776,000	2,414
Men's and Boy's	101,656	254
Women's and Girl's	257,632	696
Infants	16,296	54
Family	215,728	719
Shoes	162,184	590
Jeans/Leather	3,104	10
Tailors/Uniforms	13,968	70
Others	5,432	21
Hardware	1,415,000	6,015
Hardware	684,860	2,739
Lawn/Seed/Fertilizer	26,885	79
Others	703,255	3,197
Vehicle Service	1,788,000	4,353
Gasoline	607,920	419
Garage, Repairs	1,180,080	3,934
Miscellaneous	1,177,000	4,546
Advert. Signs, etc.	18,832	68
Barber/Beauty shop	71,797	359
Book Stores	54,142	146
Bowling	27,071	271
Cig./Tobacco Dealer	8,239	16
Dental/Physician Lab	47,080	145
Florist/Nurseries	88,275	208
Laundry, Dry Clean	40,018	133
Optical Goods/Opt.	28,248	81
Photo Sup./Photog.	81,213	232
Printing	95,337	347
Paper/Paper Products	50,611	253
Gifts/Cards/Novel.	168,311	561
Newsstands	9,416	19
Video Rent/Sales	153,010	765
Others	235,400	942
TOTAL	16,210,000	44,140

*Developed by The Chesapeake Group, Inc. 2014.

The zip code level market is substantially larger in terms of households and, thus, supports substantially more space. On the other hand, competition for local dollars is greater because of the existing commercial activity in Dade City.

In 2014, the residents living in the 33523 zip code, excluding those living in Lacoochee, generated or spent roughly \$104 million on retail goods and services. This is sufficient to support roughly 284,000 square feet of space in any and all locations as shown in Table 18.

The aggregate figures found in Table 18 are actually composites of types of operations or sub-categories associated with each category. Table 3 found in the Appendix contains the retail goods and related services sales and supportable square footage of space for 2014 generated by residents of the 33523 zip code area by category and sub-category or type of operation, excluding those living in Lacoochee.

As noted, the primary competitor for these sales is Dade City. Dade City, and its downtown which about only about seven to eight miles to the south:

Retail activity in Lacoochee is unlikely to be competitive to that in Dade City.

- ◇ have an established base of activity;
- ◇ physically resemble a traditional "main street" area;
- ◇ have an existing range of activity;
- ◇ have vacant space available to add to its inventory of activity; and
- ◇ are likely to be capable of supporting added retail in a more cost effective manner because of the existing building stock.

On the other hand, it is not centrally located for the residents of Lacoochee. Yet, commercial businesses locating in Lacoochee would need to draw on this population base to have any level of success, unless the local market was built up in one or more of the methods previously indicated.

*Table 18 - Zip Code Level Retail Goods and Related Services Space and Supportable Space by Category for 2014**

Category	2014 Sales	2014 Space in Sq. Ft.
Food	\$25,463,000	47,554
Eat/Drink	9,493,000	23,733
General Merchandise	5,007,000	16,333
Furniture	1,502,000	4,627
Transportation	23,022,000	66,991
Drugstore	6,645,000	13,290
Apparel	4,997,000	15,552
Hardware	9,107,000	38,714
Vehicle Service	11,506,000	28,011
Miscellaneous	7,573,000	29,249
TOTAL	\$104,315,000	284,054

*Developed by The Chesapeake Group, Inc. 2014.

Industrial Development

Employment needs for current residents of the Tri-Community Area are apparent based on household incomes and other factors. Certain types of "industrial" activity require less skills, while others require a higher level of training and skills.

As has been previously noted, manufacturing is changing significantly through advancements in technology, technology application and the introduction of new materials. The changing technology diminishes the importance of labor as a cost factor and increases the importance of transportation relative to other cost factors. At present, and as defined in the Cluster Analysis, the opportunities and potential for manufacturing exceed the capacity of the local labor force. The scale of potential activity would require importing labor.

Local labor capacity indicates that the current area residents' skills, with proper support, could relatively easily fit with warehousing and distribution activity. Furthermore, the enhanced infrastructure in the area, including US 301 and others, provides reasonable linkages to other markets including those in the Tampa region and the Orlando area.

Industrial opportunities exceed the capabilities and capacity of the local labor force.

The current zoning, plans and land use potentially focuses industrial activity on about 200 or more acres of land located both within the study area and just north of the study area in the adjacent county. A little less than one-half of the acreage could be described as "shovel ready," with required public services and infrastructure to accommodate a range of industrial activity that could easily be put into place. The 200 or more acres acreage consists of roughly 9.4 million square feet of land. The build out of the land, based on traditional 40% land coverage and one-story structures, is sufficient to accommodate over 3.74 million square feet of space. Based on employment averages ranging from 500 to 1,000 square feet per employee, the existing and proposed industrial areas have the capacity to employ between 1,870 to 3,740 people.

This is more than sufficient to employ current local residents. However, much of the now evolving manufacturing activity that could serve the larger regions in the future will look, feel and act like traditional office space. The amount of such space over the next ten years could result in an additional 100,000 to 250,000 square feet of space and employ those trained for higher paid positions utilizing technology.

Agriculture & Natural Resource Evaluation

The preponderance and multitude of Pasco County's natural resources, many of which are adjacent to or within the Tri-Community Area, provides the basis for this type of economic development. Lacoochee's location benefits from its proximity to Withlacoochee Watershed including the Green Swamp and other natural environments.

Taking advantage of the abundance associated with the Green Swamp's 870-square mile expanse yields a rich environment for study and continuing research, including but not limited to the following:

- ◇ Much of the area is a mosaic of wetlands, moderately moist flatlands and uplands subject to seasonal flooding. Flood and fire largely govern the composition and distribution of vegetation.

- ◇ Wildlife includes plants, mammals, birds, reptiles, fish, invertebrates, amphibians and others.
- ◇ Threatened species within this area include the Florida black bear, Bald Eagle, Florida scrub jay and wood stork.
- ◇ Widespread species include white-tailed deer, wild turkey, alligators, numerous song birds, wading birds and others.
- ◇ The landscape includes xeric uplands, herbaceous wetlands, pine flat-woods, cypress swamps and floodplain swamps.

Dade City and local farms, Green Swamp, Richloam Wildlife Management Area and Withlacoochee Forest’s environments are home to a preponderance of tropical animals, organisms, plant species and cultivated crops. Many of these are currently in testing and studies for their science, medical and manufacturing applications and benefits. These include, but are not limited to: alligators, bats, bees, birds, cultivated fruits and vegetables, diatoms, deer, fish, fruit flies, invasive aquatic plants, limnology (lake water study), opossum, farm raised poultry, dairy and animal husbandry, snakes, squirrels and toads. Research examples can be found in the Appendix.

R & D associated with the area's natural resources has significant future opportunity.

Examples of Research and Development currently or recently conducted in these categories, which continue to have potential for the Tri-Community Area include:

- Agriculture: Fruits and Vegetables
- Agriculture: Animal Husbandry, Poultry
- Indigenous Species: Woodland Animals
- Indigenous other Species: Snakes, Bees, Cane Toads
- Fruit Flies

- Indigenous and Migratory Bird Species
- Indigenous Fish Species
- Invasive Aquatic Plants
- Fresh Water Limnology

Such Research and Development opportunities have the following potential applications:

- ◇ Continue further development of existing studies, trials, and collaborative efforts.
- ◇ Adapt examples to Lacoochee’s specific resources, problems and conditions.
- ◇ Extrapolating the existing research and extending it to new and expanded uses.
- ◇ Recruiting departments or branch offices of companies, universities and other research entities to Lacoochee’s business community.

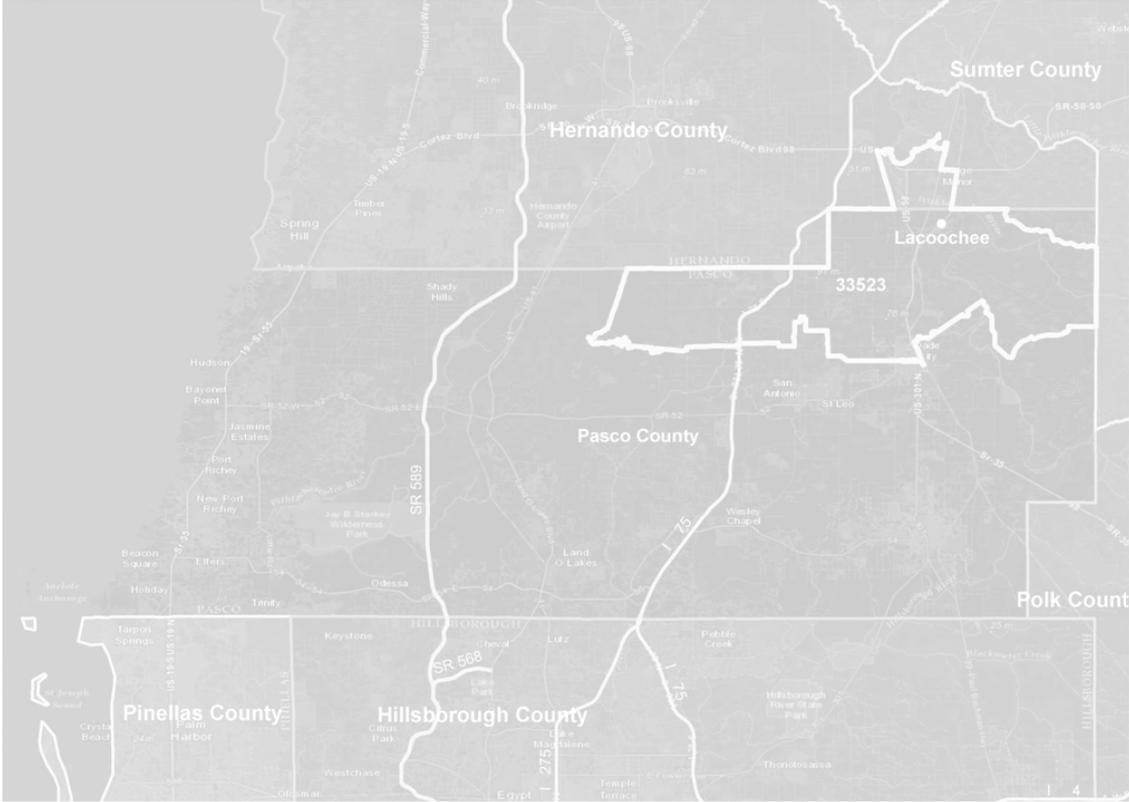
Research parks have evolved in the past ten years in Florida and other states. One example is the Treasure Coast Research Park. St. Lucie County, and its sister Indian River County in Florida, have long been nationally and internationally known for their citrus production. While the industry is still a dynamic force, it does not contribute to substantial employment growth. In an effort to foster corrective action and create a new focal point, St. Lucie County focused efforts on the development of a roughly 2,500 acre Research, Development and Education Park (Treasure Coast Research Park) situated at the interchange with the interstate system. Located on the site are now branches of the USDA, the University of Florida and other institutions.



There are what are often referred to as "green shoots" or seeds of agriculture and resource oriented activity in the Dade City area that provide opportunities for further cultivation; they may be utilized as a base for a conglomeration or foundation for both R & D and agriculture in the Tri-Community Area. These include hydroponics and aquaponics and the cultivated breeding of such species as alligators.

Transient Accommodations Evaluation

There is insufficient demand for hotel/motel room activity within the study area at this time. The lack of population density, the lack of employment concentration in the area, and the lack of immediate access to an interstate highway interchange that has a concentration of activity, together indicate there are no generators of room night demand. This should be reevaluated based on large scale employment expansion in the area in the future.



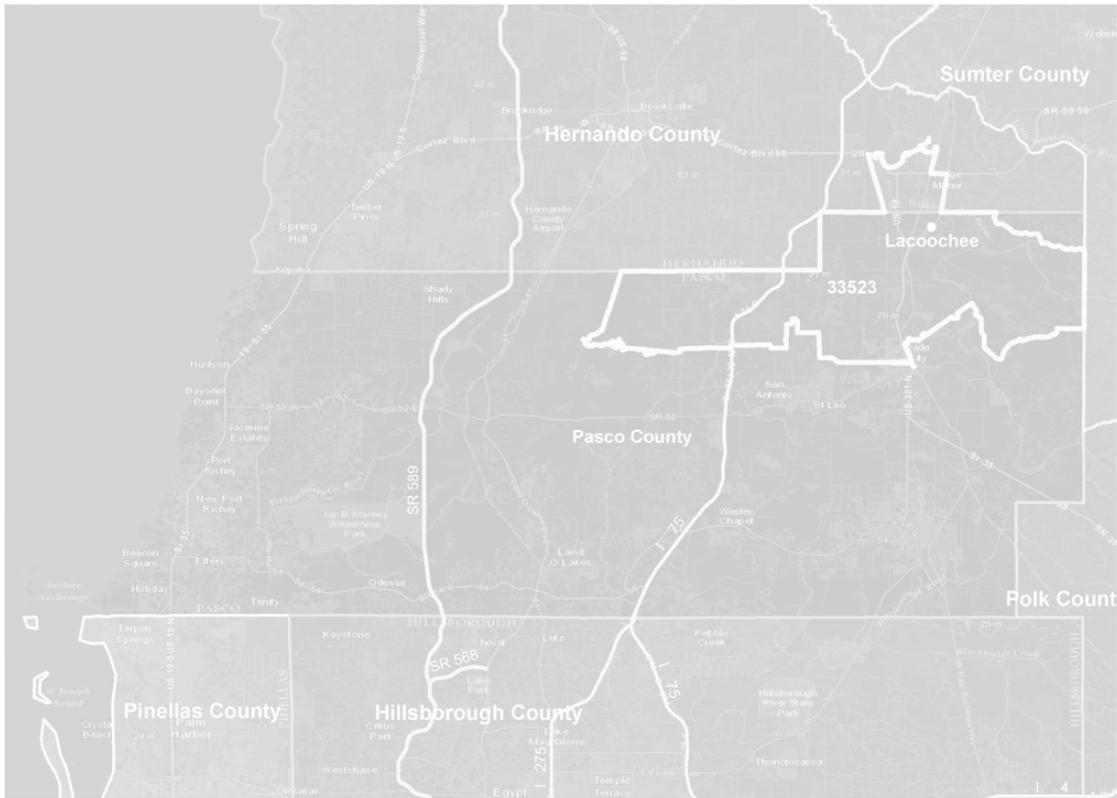
OPPORTUNITIES SYNOPSIS

Changing this area's land use and related zoning designation to "Office/Service and Compatible Technology Driven Manufacturing" or "Innovation District" would better accommodate potential development activity and facilitate the creation of new non-residential space and investment.

An example of the types of businesses that would be allowed by this new designation would be those premised upon 3D printing/adaptive manufacturing processes that function more like offices than traditional manufacturing. It also could support the development of "technical skill-based" economic activity, for which area residents could be trained. Lacooshee could develop a group of skilled tradespeople offering specialized repair services that could fix items such as eye glasses, watches, shoes, clocks, collectibles, mechanical equipment and other items. This could be an asset that would not only serve the Tampa region but potentially the entire country, as the need for this type of service is great.

To accommodate the full range of opportunities, a change in the adopted plan to create a new district is appropriate.

A traditional village center at this location is highly improbable for at least the next ten to twenty years.



THREE-TIERED STRATEGY

THREE-TIERED STRATEGY

The 2009 Lacoochee-Trilby Strategic Planning Area notes that the plan for the Lacoochee-Trilby Strategic Planning Area synthesized their citizens' desires and serves as a basis for objectives and action strategies.

The Three-Tier Strategy

Successful economic development efforts in the Tri-Community Area must reverse trends which currently exist and directly benefit the existing residents. These four overall goals are essential:

1. Incorporate current residents into the future economic structure and opportunities, raising the level of human capital in the immediate area.
2. Efficiently and effectively utilize infrastructure investments which have already been made by both the public and private sector.
3. Seek private sector activity and investment for designated developable land.
4. Maintain the rural character and identity of the area while expanding activity and enhancing the economic productivity of "agricultural" on lands designated for that use.

To accomplish these goals, a multi-tiered approach and related activities are required. A multi-tiered, phased approach is required because there are existing resources which can be brought to bear on some actions immediately. Other strategies have a longer timeframe, or are dependent upon the completion of another element or program component before they can proceed. Other activities require an injection of new resources to begin. Careful consideration is given to minimizing public sector investment in capital, while enhancing the opportunities to generate added private investment.

The actions are not intended to replace those associated with the economic development component of the adopted area plan, but modify those as appropriate based on the current and potential market conditions as well as potential opportunities.

The following defines the three tiers and summarizes the actions associated with each of the tiers.

Tier One

Tier One includes the first elements to be addressed in the plan; they can be implemented in a short time frame of six months to two years, and have an immediate impact on the area. There are five elements in Tier One:

1.1. Re-entry or Second Chance Program

For this plan to be successful, it needs to be inclusive of all of the residents of the Lacoochee area. Actions need to be taken to enhance the prospect of economic inclusion for the current residents, including those who have had interaction with the criminal justice system. While many times this has occurred during youth or as young adults, it often makes employment prospects difficult. A locally based re-entry or second chance program can help these individuals establish themselves within the labor force as well as provide assurances to potential employers both within and outside of the Tri-Community Area of their employability. The development of this program could be a significant factor in changing local economic dynamics.

Re-entry or second chance programs take on a variety of organizational structures depending upon their mission and funding sources:

- ◇ **Collaborations and coalitions**, such as the Pinellas Ex-offender Re-entry Coalition and the West Shoreline Second Chance Connections of Ottawa County in Michigan, include both government agencies and community organizations.
- ◇ **Non-profits**, both large and small, which rely on government and foundation grants. The larger entities, especially those affiliated with a national umbrella organization such as the National Urban League, frequently use federal funds associated with the Second Chance Act of 2008.
- ◇ **Faith-based organizations** such as Operation New Hope's Ready4Work of Jacksonville, Florida.
- ◇ **Public sector efforts** such as the Chicago Transit Authority and the Memphis & Shelby County Office of Re-entry.
- ◇ **Business or quasi-business operations** like America Works which uses a performance-based government contracting business model.

A locally based re-entry or second chance program can help area residents who have had interaction with the criminal justice system establish themselves within the labor force.

The missions of the various programs differ. Some organizations describe their mission as improving employment prospects for ex-offenders or as a method to reduce recidivism. Others see themselves as proponents of change in terms of welfare to work. In general, the target populations include adult ex-offenders, juvenile ex-offenders, or both. All programs have screening mechanisms for clients that include the following:

- ◇ Drug screening is common, as is a zero tolerance policy for active drug users. Some agencies require substance abuse treatment prior to program entry. In a number of cases, agencies require follow-up screenings throughout the program, including after job placement.
- ◇ Other types of screening can include finger printing, background checks, personality testing, complete physicals, blood work, and tuberculosis screens.
- ◇ Most programs reject people convicted of violent or sexual offenses. Other programs reject people convicted of domestic violence, convicted of drug trafficking, with a history of arson or convicted of crimes against children.
- ◇ Some programs accept people on the basis of having a criminal record, while others require felony convictions. Some programs reject anyone with more than one felony conviction based upon the literal interpretation of the term "second chance."
- ◇ Most programs have a residency requirement associated with the communities that they serve.
- ◇ A limited number of programs have very specific target audiences, such as individuals on parole or probation who have families with minor children.

Virtually all programs have educational or training components. In some cases, such as the San Diego-based Second Chance Job Readiness Training, the training consists of only soft skills sometimes called life skills or behavior modification. Most other training programs involve both soft and hard skills.

Related or supportive services can range from a free lunch or transportation to affordable housing. Social service agency models frequently provide case managers, while others have mentors. Federal funds from HUD and the Departments of Labor and Justice are used for rent and utility assistance. Other services can include GED classes and college level classes, credit counseling and financial literacy programs, and clothing for interviews.

There are only limited resources directed at ex-offenders within Pasco County. A Homeless Street Count Survey in 2008, performed as part of the Consolidated Plan, projected that 10% of the homeless population attributed their positions from having been released from an institution, hospital, or jail. Ex-offenders are eligible for transitional housing combined with supportive services for up to 24 months.

Employment resources not specific to ex-offenders are available through Connections Job Development Program in New Port Richey, which is a private non-profit working in conjunction with the Pasco Hernando Workforce Board's Career Central One Stop Center. There is also a branch office in Dade City. CareerSource Pasco Hernando administers and can provide assistance on the Federal Bonding Program and Work Opportunity Tax Credit.

The Pinellas County Ex-offender Re-entry Coalition reports that over 2,000 ex-offenders from State prisons re-enter Pinellas County each year, while well over 7,000 County detention facility inmates do so as well.

*Table 19 - Pinellas County Ex-offenders Statistics**

	# Re-entering/year	Recidivism rate
Pinellas County Detention	7,282	50-60%
State DOC	2,000 +	60-70%

*Pinellas County Ex-offender Re-entry Coalition

The following table compares Pasco County to Pinellas County in terms of population and the number of inmates, both within County detention facilities and the Florida Department of Corrections (DOC). The DOC data is for 2011-2012 and shows the county of conviction for the primary offense. Pasco County has about 43% of the number of state inmates compared to Pinellas County and 44% of the number of County inmates.

There are only limited resources directed at supporting those needing re-entry assistance for employment within Pasco County but significant numbers of individuals incarcerated.

*Table 20 - Population, State Inmates and County Detention Inmates for Pasco and Pinellas Counties***

	Population 2010	State Inmates	County Detention
Pinellas County	929,048	5,057	3,058
Pasco County	475,502	2,193	1,342

**FL DOC for 2011-2012 and FL DOC average daily population March 2012

Bonding is often an effective tool in re-entry or second chance programs. A bonding program is a tool for marketing an applicant to prospective employers. The purpose of the Federal Bonding Program is to assist ex-offenders and other at-risk persons with questionable backgrounds to secure jobs, which might be denied employment due to their previous personal or employment history. Importantly, bonding helps protect employers from loss of money or property due to the actions of the potential employee.

Bonding programs offer the following benefits:

- ◇ Provides job opportunities to job seekers who have been or may be denied commercial bonding coverage due to their previous personal or employment history.
- ◇ Promotes confidence and alleviates the concerns of the employer in the job seeker, who often needs a break to participate in employment or to show that he/she can be a productive worker.

Bonding typically applies to any job except self-employment, and bonding coverage is typically provided at no cost to the job seeker.

The Department of Labor offers a number of related grants through its Employment and Training Administration. For Spring of 2015, there will be a total of \$27 million through the Adult Reentry Program to provide training and employment for inmates age 18 and older participating in state and/or local work-release programs, and \$30.5 million in the form of Face Forward grants which focus on giving youth a second chance of succeeding in the workplace.

1.2. Additional Job Training

In addition to the establishment of a re-entry or second chance program, many in the area need additional job training assistance to participate in most, if not all, of the opportunities available. The following are particular areas of training that will solidify the skills of the work force both at the present time and in the foreseeable future:

Research and agriculture laboratory skills
Animal husbandry skills
CAD
Additive manufacturing/3D Printing
Drone Development/Production

Advanced Logistic Product Delivery & Distribution
Health Care
Technical services and trade skill training
Mechanical

This would include basic employment training and lifestyle skills essential for participation in the work force.

1.3. Peer-to-peer Vehicle Sharing Program

A fundamental issue with any training is transportation; the limited public transportation service and lack of private vehicles available make it difficult to participate in training. To alleviate this issue, training services should be provided within the central core of Lacooshee to be most effective and easily reachable. Training can be provided in a cooperative manner between the schools system at the high school level or by the community college. Another way to assist with the inclusion of all local residents is the establishment of a peer-to-peer vehicle sharing program. This type of transportation is in its evolutionary stages within the country and has first been applied within urban settings and at airports.

Peer-to-peer car sharing (sometimes called personal vehicle sharing) allows private citizens to go into the rental business for themselves. It is part of a much larger movement often referred to as collaborative consumption or a sharing economy that is attracting more and more Americans.

An extensive study published in 2012 by Berkeley's Transportation Sustainability Research Center found that peer sharing is a growing business worldwide; it was estimated there were 1,500 vehicles in such programs in the United States. The programs are generally set up as follows:

- ◇ The vehicle(s) need to be registered with a car sharing company.
- ◇ When registered, the liability from the private auto insurance company is transferred to the car sharing company, except when the owner is operating the car or truck. When the owner is operating the vehicle, he/she is insured by his private auto insurance company.
- ◇ The car sharing company must have its own auto insurance to cover shared vehicles.
- ◇ The vehicle sharing company could outright own the vehicles.

Additional job training opportunities provided in the Tri-Community Area to enhance skills will help with raising the potential quality of the local labor force.

The business models can vary. In some cases, the companies facilitate direct transactions between peers. In others, the companies oversee the rentals themselves. A company could purchase the individuals' vehicles and run essentially as a co-op.

Because of its application in the Tri-Community Area, which is a rural or non-urbanized setting, grant funds may be available for a pilot project.

The establishment of a peer-to-peer vehicle sharing program would enhancement opportunities for local residents.

1.4. Farmers' market

Farmers' markets, or outlets that allow farmers to direct market their products, **can increase profits as it allows farmers to capture additional income streams.** In 1994, the United States Department of Agriculture (USDA) began publishing the National Directory of Farmers' markets which list farmers' markets known to operate in the United States. The USDA does a comprehensive update every year.

The Florida Department of Agriculture and Consumer Services maintains and advertises a listing of 160 farmers' markets in Florida; two are located in Pasco County. They are:

- ◇ The Fresh Market at Wiregrass located at The Shops at Wiregrass, 28211 Paseo Drive, Wesley Chapel, which reportedly has 80 to 100 vendors catering to New Tampa and Wesley Chapel.
- ◇ The Longleaf Farmers' market at 3104 Town Avenue, in New Port Richey.

The USDA Agricultural Marketing Service's (AMS) most current National Farmers' market Directory also identifies the Longleaf market along with an additional New Port Richey market and two other establishments with farmers' markets components within Pasco County. These are:

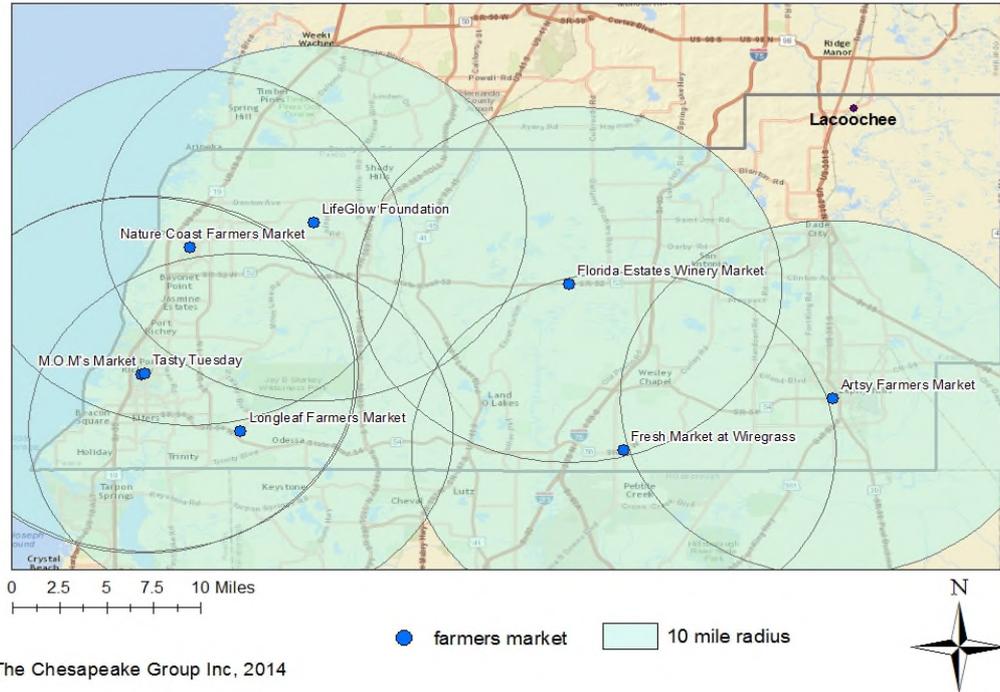
- ◇ M.O.M's Friday Night Market within New Port Richey's Historic District, which replaced the previously USDA identified Downtown Market sponsored by the Greater New Port Richey Main Street.
- ◇ Florida Estates Winery Market at 25241 State Road 52 in Land O' Lakes that is a "3,600 acre working plantation" and offers on and off site wine sales.
- ◇ LifeGlow Foundation at Dhali's Organic Farm at 14850 Family Trail, Hudson. Advertised as a "spacious 35-acre pastoral space, just 30 minutes north of Tampa and 10 miles from the gulf coast" the farm regularly sells products through Tampa Bay markets, co-ops and directly to Community Supported Agriculture (CSA) members.

In addition, the Hudson Regional Library will host the new Nature Coast Farmers' market at 8012 Library Road in Hudson, and the City of Zephyrhills held its first Zephyrhills Artsy Farmers' market in November of last year. The market located at the Times Square Park features vendors from the Wiregrass market along with 20 additional produce vendors.

Direct marketing by farmers boosts farm income. The Lacoochee area is the only area in Pasco County not served by a farmers' market.

Based upon a comprehensive national farmers' market managers survey, the USDA defines Pasco County as a Rural-Urban Continuum 1 with a customer trade zone of ten miles. The zone is defined as the average distance that a customer will travel to visit the market. None of the identified markets in Pasco County are in proximity to the Tri-Community Area. The community is completely outside of their overlapping market areas/trade zones.

Pasco County Farmers Markets



The establishment of a farmers' market in the core of Lacoochee is a first step in enhancing agricultural revenues and preserving local farms. The initial market could be small and outdoors but could expand over the years.

The establishment of a farmers' market within the community, at or in proximity to the Lacoochee Community Center, would provide a number of tangible benefits, including the following:

- ◇ Provide residents with greater access to healthy farm fresh food.
- ◇ Expand activity at the community center.
- ◇ Give local and larger area producers new marketplace and income opportunities.
- ◇ Support local farmers and increase agricultural revenues.

The establishment of a farmers' market in the area is a first step in enhancing agricultural revenues and preserving local farms.

The farmers' market would also advance a number of goals and principles of the current Lacoochee-Trilby Strategic Master Plan by:

- ◇ developing community gathering places;
- ◇ identifying opportunities to locate essential community services in the area and address the daily needs of the citizens; and
- ◇ promoting agri-tourism activities.

The farmers' market would further a number of goals and principles of the current Lacoochee-Trilby Strategic Master Plan.

It is worth noting that three of the identified markets within Pasco County benefit from some sort of public sector assistance. Two are held on public library property, and a third has direct city support.

Additional information on farmers' markets and funding is found in the Appendix.

1.5. The Lacoochee Community Center

The Lacoochee Community Center recently opened its doors for activities. Substantial private investment and community input went into the Community Center's development and design. The building and immediate land that surrounds the multi-purpose building is under the control of the Boys and Girls Club; the Club is responsible for both programming and maintenance of the structure and land.

The Lacoochee Community Center building is situated within an area with substantial public infrastructure and investment that is intended to serve large audiences. There is a school across the street, and significant parks and recreation fields are adjacent to the Center. Thus, there is substantial public and private investment which has been made in the immediate area, as well as an enhanced entranceway on US 301.

The building is of strategic importance because it represents a significant symbol to the community of investment, dedication and rejuvenation intended to serve the larger community. It has the potential to house a range of training, education and other economic development functions.

Handling the programming for functions beyond youth related activities, in addition to the long-term maintenance responsibilities for a structure of this scale, are non-traditional roles for the Club. Funds will have to be raised for building modifications, replacement of minor and major infrastructure, and non-traditional youth activities, potentially diverting the Club's limited resources or challenging the experience of staff. This could raise a serious question of fiscal and physical sustainability in the future.

The building is of strategic importance because **it represents a significant symbol to the community of investment, dedication and rejuvenation** intended to serve the larger community. It has the potential to house a range of training, education and other economic development functions. Based on interviews, there may be misconceptions or perceptions as to the operation of the facility and the need to have agreements for use by groups that can be held responsible and not just open to the public. Perceptions are reality to those who hold them; and these perceptions could cause tension in the long-run between the facility's management and the community.

The Center currently houses the Boy and Girls Club, a limited service medical clinic, a small number of other organizations that have a presence on at least part-time basis, and a "community-based" police/law enforcement entity known as Officer Friendly. The adjacent recreation fields, operated by the County, are under-utilized at present.

One issue that is limiting the use of the Center facilities and their activity levels is the lack of transportation services for the public; this impacts both the population and geographic area that is served. This is a serious issue for both the short and long-term viability of the Center. For example, medical services have been identified as a serious gap that in many cases impacts the labor force, and the Center could address this gap with the medical clinic. But this need will not be addressed, and the medical clinic will not achieve viability if people are unable to get to the clinic. This lack of transportation also hinders all other Center activity.

Adding activities, such as a farmers' market, job training and technical training, would effectively turn the Community Center into an economic engine.

As noted, a clear economic development goal is to efficiently and effectively utilize infrastructure investments which have already been made by both the public and private sector. This is unlikely to evolve unless policy and functions are adapted to alter this situation. It is recognized that these changes involve different administrative and operational functions within Pasco County that have separate funding and budgeting processes; dialogue may not exist at present or may need to be strengthened.

Conversations need to happen regarding the following:

- ◇ Utilization of the school buses in off-peak hours for transport of area residents to the center for organized activity.
- ◇ The establishment of the "peer-to-peer" vehicle sharing program that could be administered and operated out of the Community Center location.
- ◇ Sharing of management responsibilities and operations of the Lacoochee Community Center with the County (potential parks and recreation or education) with additional marketing programming personnel and assistance provided to the Boys and Girls Club.
- ◇ Incorporation of other services into the operation of the facility.

Other services that could be incorporated into the Community Center include: a farmers' market; a reentry or second chance program; job training courses offered by the community college, colleges or other entities; technical training courses offered by the education department, community college or other entities; training associated with an apprenticeship effort; and senior-oriented activities.

Adding activities to the Community Center would effectively turn a potentially struggling situation into both an enhanced community resource and an economic engine. It could result in an increase in benefits to the Tri-Community Area without requiring substantial public or private capital funds.

Tier Two

Tier Two activity generally enhances Tier One activities or requires additional time for implementation; the timeframe for Tier Two work can be completed in three to five years. There are four actions defined.

2.1. Farmers' market - Expansion of Activity

The initial farmers' market is likely to involve a small number of participants. Over time the market can and should evolve to a larger and permanent structure with an increased number of participants that operates throughout the year. In the future, the farmers' market can operate as a distribution center as well, further supporting local agriculture.

A second phase of the farmers' market should be explored to allow for growth as quickly as possible once the initial activity is underway.

2.2. Additional Agricultural Efforts

As just noted, there is potential for the continued evolution of the farmers' market concept beyond that of a permanent farmers' market. As highlighted in the Cluster Analysis, there is a gap in distribution facilities for agricultural products.

There are two models for distribution centers. One is produce driven. The other is non-profit driven.

A **produce-driven model** is a distribution model based on aggregating, processing and selling produce focused on full-scale or limited product lines. **Non-profit driven models** often are associated with niche activity or products. For example, a rapidly growing component of the market for the past few years has been organically grown and certified farm products.

Both models can serve small farmers and result in farmer revenue expansion. Both can serve smaller areas such as one or two regions of a state or large multi-state areas. Some provide technical assistance, farmer mentoring, and aggregation services.

The products of either often are purchased by school systems, regional supermarket chains and independent grocers. Examples can be found in the Appendix.

2.3. Apprenticeship Efforts

The Withlacoochee River Energy Cooperative (WREC) is a major employer, substantial investor and partner in the Tri-Community Area.

It is a testament to their management, quality of operations and track record that WREC enjoys low employee turnover by any industry standard. Yet WREC experiences inevitable labor force change through retirements, changes in health, and relocation of those skilled employees that assure the function of the systems at the grassroots/lineman/consumer level.

Establishing a collaborative apprenticeship program targeted toward local residents could have a substantial benefit in mitigating feelings of hopelessness, enhance other education efforts and instill a sense of reward and accomplishment.

WREC set up a targeted apprenticeship program to educate and train a number of the community residents. While the apprenticeship program may be small in numbers at any point in time, it is important strategically because it is seen as upward mobility employment.

A step that should be taken to enhance economic vitality within the community is to follow the lead of WREC and establish a collaborative apprenticeship program targeted toward local residents for businesses in and around the Tri-Community Area. Such a program, coupled with other actions such as the re-entry or second chance program and training, could effectuate dramatic change and human capital growth.

If possible, promoting such training through the school system for the "best and the brightest" technically oriented high school seniors or community college students would be beneficial. Funding from federal, state and local entities is likely for such a pilot effort. Promoting the program and opportunity could have a substantial benefit in mitigating feelings of hopelessness, enhance other education efforts and instill a sense of reward and accomplishment in the larger community.

2.4. Tenant Recruitment

As noted, there are many opportunities for a wide range of industrial activities, potentially yielding substantial employment, utilization of manufacturing, and other benefits.

Recruitment is generally a critical component of an economic development program. Without it, it is highly likely that a number of opportunities will be lost. It cannot be assumed that, because these opportunities exist, people will naturally seek them out; rather, they can only seek opportunities of which they are aware.

Recruitment is a critical component of an economic development program in general. It cannot be assumed that because opportunities exist, people will naturally seek those opportunities.

A proactive recruitment program should be implemented. It is important to note that none of the individual localities that compose the area, or other quasi-public or public sector entities that own properties, is likely to effectively promote their reuse or development at present in the suggested manner. Also, traditional means of marketing, such as multiple listing, does not reach targeted audiences well; nor does it stimulate interests from those outside of the area that are often relied upon to make the initial investments.

While partnering with entities at the County and State levels is important in recruiting activity, it is believed that the public and quasi-public sectors will continue to have limited staff and fiscal resources available for recruitment activity. Therefore:

- ◇ Only limited activity can be expected, whether monthly or quarterly. One option is for local area volunteers to work in cooperation with the County and State. The area should establish priorities and allocate limited resources accordingly.
- ◇ Those involved could focus on one component of recruitment at a time or focus on a variety of commercial opportunity areas at one time. The amount of activity will largely depend upon the allocation of personnel resources (staff and volunteers).

Recruitment activity should involve the following:

- ◇ Identification of preferred business clusters appropriate and desirable to recruit.
- ◇ Prescreening of entities involved in the preferred business clusters.
- ◇ Preparation of targeted marketing materials that would be used to recruit a specific business cluster.
- ◇ The creation of internal capacity to be able to modify the materials so they can be used for the recruitment of additional business clusters.
- ◇ Development of a marketing plan utilizing electronic, direct mail and other methods, depending upon the budget constraints.
- ◇ Actual solicitation.
- ◇ Follow-up to initial solicitation.
- ◇ Playing an ombudsman role in the process so that the proverbial "ball is not dropped."

Tier Three

The following four activities in Tier Three represent additional actions, often with the opportunity to utilize or further enhance Tier One and Tier Two activity, and have a timeline of five to seven years.

3.1. Creation of a Technical "Repair" Concentration

There are a number of fundamental technical skills that have largely been lost throughout this country and for which the demand continues to exist. These include but are not limited to shoe repair and cobbler services, shoe and leather refinishing, watch repair, clock repair, glasses repair, and the repair of numerous other consumer goods. There are also mechanical training skills for which there is continued demand including those associated with engine repairs, home generator repairs, etc.

Furthermore, there is potential for growth in employment associated with installation of small and home-based solar energy units and printer maintenance associated with 3D/additive manufacturing. Development of incubator activity and training related to any and all of the above could create an economic engine serving Tampa, the Orland area, other parts of Florida, and potentially the entire country. Such a focus could provide a sustainable tool for employment in the area and differentiate the Tri-Community Area from other sections of the Tampa Region and Florida.

The following is essential to develop such activity:

- ◇ Identification of an initial building along US 301 that could house the start-up activity.
- ◇ Development of a technical training program for Tri-Community Area residents.
- ◇ Assistance with business plan development through SCORE, universities and colleges, or others.
- ◇ Entrepreneurship/business management training.
- ◇ Marketing and promotion program development and funding.
- ◇ Loan or grant funding for initial equipment.

Creation of a technical "repair" concentration, with enhanced local residential skill training, could result in niche activity serving the Tampa, Orlando and other parts of Florida areas as well as meet the needs of a national market.

3.2. Additional Agricultural Efforts

Food hubs serve as distribution centers for growers. Food hubs are described as businesses or organizations that connect the producers with buyers by offering production, distribution, and marketing services to the wholesale retailer. They are an enhanced full-year efforts beyond that described in Tier Two.

There are only 2 food hubs in all of Florida. These are German Bread Haus at Oakland Park in Broward County and Suncoast Food Alliance, Bradenton in Manatee County. Over time, Lacoochee, with its rail and highway access, could become a third HUB for the Orlando-Tampa-Gainesville area which includes the corporate headquarters for Publix in Lakeland.

3.3. Capitalizing on R & D Opportunities

To pursue R & D opportunities in the Lacoochee area it is essential to develop a concerted effort and partnerships between local farm interests, natural resource interests and others. (This same statement is appropriate for almost any locality that does not have indigenous research entities but has agricultural and natural resources.)

To facilitate the recruitment of new research, product development businesses and their related services, an extensive network of credentialed, regional business and technology professional resources are available, including, but not limited to: regional organizations, colleges and universities that are potential research partners with businesses, course-specific academic training/feeder partners and recruitment resources for employees.

The area is fortunate to have an abundance of natural and agricultural resources, research partners that can be tapped and an entity with the capacity to initiate the dialogue.

These entities need to be brought together to initiate the process and begin further dialogue. WREC is an appropriate entity, in conjunction with the County, to convene the entities and to initiate the conversation to pursue R & D opportunities.

3.4. Agri-tourism, Agri-education & Expansion of Natural Resource Tourism

Eco-tourism, agri-tourism and other related tourism activity is identified in the 2009 area plan as being a potential future focus for Lacoochee because of the existing and future land use and resources. That is still true. However, it will take substantial time to evolve and will require significant partnerships with public and private entities associated with nearby forests, the river and river basin, local farming interests, etc. This work is less likely to yield a positive impact on current residents and the labor force than are the other actions indicated in this study in the near term.

Strategy Synopsis

Implementation of successful economic development strategies takes a managed, consistent and effective set of actions to achieve the designated goals.

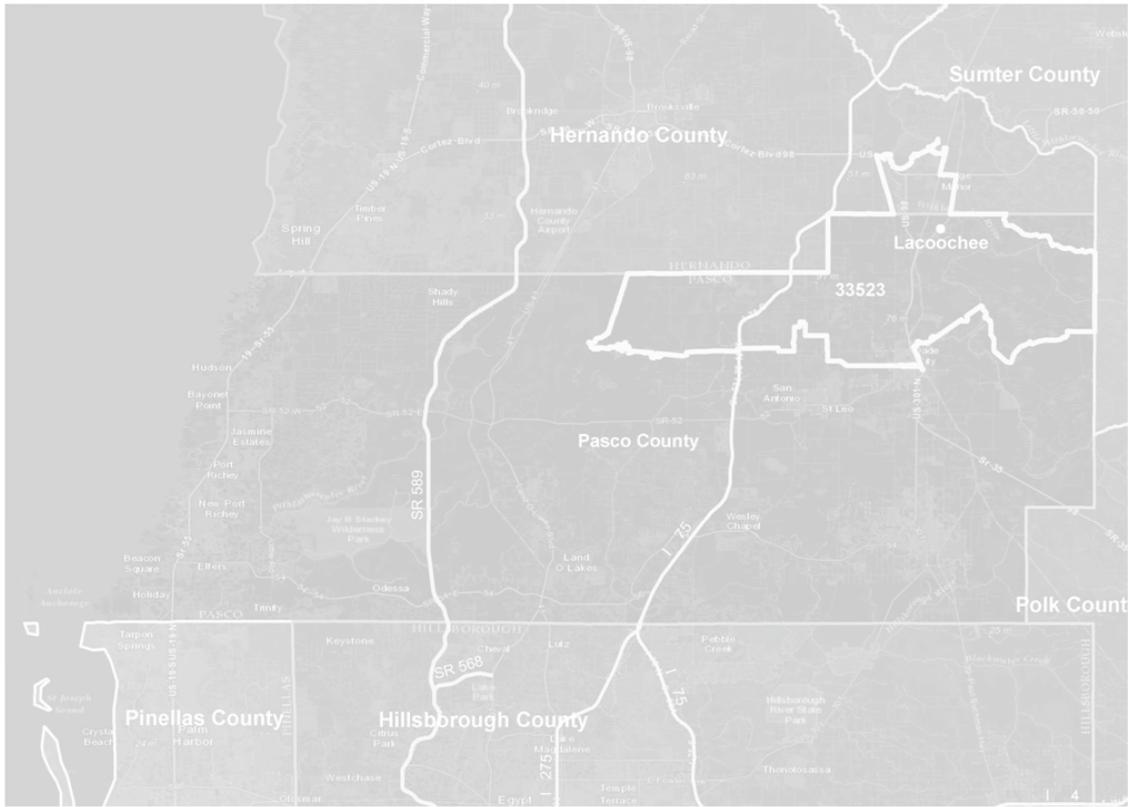
The actions required to enhance the vitality of the community and its residents while preserving its rural character and charm have been defined in three tiers. Tier One can be implemented in short duration if pursued, generally within a six month to two year time frame. Tier Two can be achieved in a three to five year period, with Tier Three activity likely to take five to seven years.

As defined, Tier One includes creating a re-entry or second chance program, additional job training, activity to increase resident mobility, the establishment of a farmers' market and expansion of the use of the Lacoochee Community Center.

Tier Two includes furthering enhanced agricultural activity, collaborative apprenticeship efforts, and an increase in proactive tenant recruitment efforts.

Tier Three involves pursuit of a niche that would change the image of the area while enhancing local business expansion, expansion of agriculture actions, and establishment a process and active pursuit of partnerships to further R & D activity and tap opportunities.

Collectively, such actions will achieve the goals to incorporate current residents into the future economic structure and opportunities, raise the level of human capital in the immediate area, efficiently and effectively utilize infrastructure investments which have already been made by both the public and private sector, and actively seek private sector activity and investment for designated developable land while maintaining the rural character and image.



APPENDIX

APPENDIX

The following provide additional information upon which opportunities and program elements are premised. Each table is identified in the text of the document.

*Table 1 - Under-represented at the Zip Code Level**

NAICS code	NAICS code description
237310	Highway, Street, and Bridge Construction
238210	Electrical Contractors and Other Wiring Installation Contractors
238220	Plumbing, Heating, and Air-Conditioning Contractors
238350	Finish Carpentry Contractors
323111	Commercial Printing (except Screen and Books)
327320	Ready-Mix Concrete Manufacturing
332710	Machine Shops
423830	Industrial Machinery and Equipment Merchant Wholesalers
423930	Recyclable Material Merchant Wholesalers
424910	Farm Supplies Merchant Wholesalers
441310	Automotive Parts and Accessories Stores
442110	Furniture Stores
443141	Household Appliance Stores
443142	Electronics Stores
444110	Home Centers
444120	Paint and Wallpaper Stores
444190	Other Building Material Dealers
444220	Nursery, Garden Center, and Farm Supply Stores
446110	Pharmacies and Drug Stores
447110	Gasoline Stations with Convenience Stores
447190	Other Gasoline Stations
448120	Women's Clothing Stores
448140	Family Clothing Stores
448210	Shoe Stores
448310	Jewelry Stores
452990	All Other General Merchandise Stores
453310	Used Merchandise Stores
453991	Tobacco Stores
484230	Specialized Freight (except Used Goods) Trucking, Long-Distance
511110	Newspaper Publishers
517110	Wired Telecommunications Carriers
522110	Commercial Banking
522291	Consumer Lending
522390	Other Activities Related to Credit Intermediation
523120	Securities Brokerage
524210	Insurance Agencies and Brokerages
531311	Residential Property Managers
531320	Offices of Real Estate Appraisers
532210	Consumer Electronics and Appliances Rental
532299	All Other Consumer Goods Rental
541110	Offices of Lawyers
541211	Offices of Certified Public Accountants
541219	Other Accounting Services
541370	Surveying and Mapping (except Geophysical) Services
541611	Administrative Management and General Management Consulting Services

*Table 1 - Under-represented at the Zip Code Level Continued**

NAICS code	NAICS code description
541921	Photography Studios, Portrait
561320	Temporary Help Services
562111	Solid Waste Collection
621111	Offices of Physicians (except Mental Health Specialists)
621210	Offices of Dentists
621310	Offices of Chiropractors
621320	Offices of Optometrists
621340	Offices of Physical, Occupational and Speech Therapists, and Audiologists
621399	Offices of All Other Miscellaneous Health Practitioners
621420	Outpatient Mental Health and Substance Abuse Centers
622110	General Medical and Surgical Hospitals
623210	Residential Intellectual and Developmental Disability Facilities
623312	Assisted Living Facilities for the Elderly
624110	Child and Youth Services
624120	Services for the Elderly and Persons with Disabilities
624190	Other Individual and Family Services
624310	Vocational Rehabilitation Services
624410	Child Day Care Services
713910	Golf Courses and Country Clubs
721110	Hotels (except Casino Hotels) and Motels
722511	Full-Service Restaurants
722513	Limited-Service Restaurants
811191	Automotive Oil Change and Lubrication Shops
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) R&M
812210	Funeral Homes and Funeral Services
812220	Cemeteries and Crematories
812310	Coin-Operated Laundries and Drycleaners

*Developed by The Chesapeake Group, Inc. 2014.

*Table 2 - Under-represented at the County Level**

NAICS code	NAICS code description
113110	Timber Tract Operations
113310	Logging
212321	Construction Sand and Gravel Mining
213112	Support Activities for Oil and Gas Operations
221210	Natural Gas Distribution
236117	New Housing For-Sale Builders
236118	Residential Remodelers
236210	Industrial Building Construction
236220	Commercial and Institutional Building Construction
237310	Highway, Street, and Bridge Construction
238120	Structural Steel and Precast Concrete Contractors
238170	Siding Contractors
238210	Electrical Contractors and Other Wiring Installation Contractors
238330	Flooring Contractors
311340	Nonchocolate Confectionery Manufacturing
311421	Fruit and Vegetable Canning
311612	Meat Processed from Carcasses
311811	Retail Bakeries
311812	Commercial Bakeries
311821	Cookie and Cracker Manufacturing

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
312120	Breweries
312130	Wineries
313220	Narrow Fabric Mills and Schiffli Machine Embroidery
314910	Textile Bag and Canvas Mills
315990	Apparel Accessories and Other Apparel Manufacturing
321113	Sawmills
321214	Truss Manufacturing
321219	Reconstituted Wood Product Manufacturing
321920	Wood Container and Pallet Manufacturing
322130	Paperboard Mills
322211	Corrugated and Solid Fiber Box Manufacturing
322230	Stationery Product Manufacturing
323111	Commercial Printing (except Screen and Books)
323113	Commercial Screen Printing
324121	Asphalt Paving Mixture and Block Manufacturing
325120	Industrial Gas Manufacturing
325211	Plastics Material and Resin Manufacturing
325412	Pharmaceutical Preparation Manufacturing
325510	Paint and Coating Manufacturing
325520	Adhesive Manufacturing
325611	Soap and Other Detergent Manufacturing
325992	Photographic Film, Paper, Plate, and Chemical Manufacturing
326220	Rubber and Plastics Hoses and Belting Manufacturing
326291	Rubber Product Manufacturing for Mechanical Use
327215	Glass Product Manufacturing Made of Purchased Glass
327332	Concrete Pipe Manufacturing
327991	Cut Stone and Stone Product Manufacturing
331110	Iron and Steel Mills and Ferroalloy Manufacturing
331491	Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding
331511	Iron Foundries
331523	Nonferrous Metal Die-Casting Foundries
331524	Aluminum Foundries (except Die-Casting)
332114	Custom Roll Forming
332119	Metal Crown, Closure, and Other Metal Stamping (except Automotive)
332216	Saw Blade and Handtool Manufacturing
332312	Fabricated Structural Metal Manufacturing
332313	Plate Work Manufacturing
332710	Machine Shops
332721	Precision Turned Product Manufacturing
332722	Bolt, Nut, Screw, Rivet, and Washer Manufacturing
332811	Metal Heat Treating
332813	Electroplating, Plating, Polishing, Anodizing, and Coloring
332991	Ball and Roller Bearing Manufacturing
332996	Fabricated Pipe and Pipe Fitting Manufacturing
333243	Sawmill, Woodworking, and Paper Machinery Manufacturing
333413	Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing
333414	Heating Equipment (except Warm Air Furnaces) Manufacturing
333415	Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing
333515	Cutting Tool and Machine Tool Accessory Manufacturing
333922	Conveyor and Conveying Equipment Manufacturing
333993	Packaging Machinery Manufacturing

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
333995	Fluid Power Cylinder and Actuator Manufacturing
334118	Computer Terminal and Other Computer Peripheral Equipment Manufacturing
334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables
335932	Noncurrent-Carrying Wiring Device Manufacturing
336212	Truck Trailer Manufacturing
336214	Travel Trailer and Camper Manufacturing
336350	Motor Vehicle Transmission and Power Train Parts Manufacturing
336370	Motor Vehicle Metal Stamping
337121	Upholstered Household Furniture Manufacturing
337211	Wood Office Furniture Manufacturing
337212	Custom Architectural Woodwork and Millwork Manufacturing
337215	Showcase, Partition, Shelving, and Locker Manufacturing
337910	Mattress Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339114	Dental Equipment and Supplies Manufacturing
339910	Jewelry and Silverware Manufacturing
339991	Gasket, Packing, and Sealing Device Manufacturing
339992	Musical Instrument Manufacturing
423110	Automobile and Other Motor Vehicle Merchant Wholesalers
423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers
423130	Tire and Tube Merchant Wholesalers
423210	Furniture Merchant Wholesalers
423220	Home Furnishing Merchant Wholesalers
423310	Lumber, Plywood, Millwork, and Wood Panel Merchant Wholesalers
423330	Roofing, Siding, and Insulation Material Merchant Wholesalers
423410	Photographic Equipment and Supplies Merchant Wholesalers
423420	Office Equipment Merchant Wholesalers
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers
423510	Metal Service Centers and Other Metal Merchant Wholesalers
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers
423620	Household Appliances, Electric Housewares, and Consumer Electronics Merchant Wholesalers
423710	Hardware Merchant Wholesalers
423720	Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers
423730	Warm Air Heating and Air-Conditioning Equipment and Supplies Merchant Wholesalers
423740	Refrigeration Equipment and Supplies Merchant Wholesalers
423810	Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers
423830	Industrial Machinery and Equipment Merchant Wholesalers
423840	Industrial Supplies Merchant Wholesalers
423850	Service Establishment Equipment and Supplies Merchant Wholesalers
424110	Printing and Writing Paper Merchant Wholesalers
424120	Stationery and Office Supplies Merchant Wholesalers
424130	Industrial and Personal Service Paper Merchant Wholesalers
424210	Drugs and Druggists' Sundries Merchant Wholesalers
424310	Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers
424320	Men's and Boys' Clothing and Furnishings Merchant Wholesalers
424340	Footwear Merchant Wholesalers
424420	Packaged Frozen Food Merchant Wholesalers
424450	Confectionery Merchant Wholesalers
424470	Meat and Meat Product Merchant Wholesalers
424480	Fresh Fruit and Vegetable Merchant Wholesalers

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
424510	Grain and Field Bean Merchant Wholesalers
424610	Plastics Materials and Basic Forms and Shapes Merchant Wholesalers
424710	Petroleum Bulk Stations and Terminals
424720	Petroleum and Petroleum Products Merchant Wholesalers (except Bulk Stations and Terminals)
424810	Beer and Ale Merchant Wholesalers
424820	Wine and Distilled Alcoholic Beverage Merchant Wholesalers
424910	Farm Supplies Merchant Wholesalers
424920	Book, Periodical, and Newspaper Merchant Wholesalers
441228	Motorcycle, ATV, and All Other Motor Vehicle Dealers
441310	Automotive Parts and Accessories Stores
442110	Furniture Stores
443141	Household Appliance Stores
443142	Electronics Stores
444110	Home Centers
444120	Paint and Wallpaper Stores
444130	Hardware Stores
444210	Outdoor Power Equipment Stores
444220	Nursery, Garden Center, and Farm Supply Stores
445110	Supermarkets and Other Grocery (except Convenience) Stores
445292	Confectionery and Nut Stores
445310	Beer, Wine, and Liquor Stores
446130	Optical Goods Stores
447190	Other Gasoline Stations
448110	Men's Clothing Stores
448120	Women's Clothing Stores
448130	Children's and Infants' Clothing Stores
448150	Clothing Accessories Stores
448190	Other Clothing Stores
448210	Shoe Stores
448310	Jewelry Stores
448320	Luggage and Leather Goods Stores
451110	Sporting Goods Stores
451120	Hobby, Toy, and Game Stores
451130	Sewing, Needlework, and Piece Goods Stores
451140	Musical Instrument and Supplies Stores
451211	Book Stores
451212	News Dealers and Newsstands
452112	Discount Department Stores
453110	Florists
453210	Office Supplies and Stationery Stores
453220	Gift, Novelty, and Souvenir Stores
453310	Used Merchandise Stores
453910	Pet and Pet Supplies Stores
453920	Art Dealers
453991	Tobacco Stores
454113	Mail-Order Houses
454210	Vending Machine Operators
481111	Scheduled Passenger Air Transportation
484122	General Freight Trucking, Long-Distance, Less Than Truckload
484220	Specialized Freight (except Used Goods) Trucking, Local
485113	Bus and Other Motor Vehicle Transit Systems
485310	Taxi Service
485991	Special Needs Transportation
486210	Pipeline Transportation of Natural Gas

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
486910	Pipeline Transportation of Refined Petroleum Products
488210	Support Activities for Rail Transportation
488410	Motor Vehicle Towing
488510	Freight Transportation Arrangement
492110	Couriers and Express Delivery Services
493110	General Warehousing and Storage
493120	Refrigerated Warehousing and Storage
511110	Newspaper Publishers
511130	Book Publishers
511140	Directory and Mailing List Publishers
511210	Software Publishers
512191	Teleproduction and Other Postproduction Services
515112	Radio Stations
515120	Television Broadcasting
517110	Wired Telecommunications Carriers
517210	Wireless Telecommunications Carriers (except Satellite)
518210	Data Processing, Hosting, and Related Services
519120	Libraries and Archives
519130	Internet Publishing and Broadcasting and Web Search Portals
522110	Commercial Banking
522130	Credit Unions
522210	Credit Card Issuing
522220	Sales Financing
522291	Consumer Lending
522292	Real Estate Credit
523120	Securities Brokerage
523920	Portfolio Management
523930	Investment Advice
523991	Trust, Fiduciary, and Custody Activities
524113	Direct Life Insurance Carriers
524114	Direct Health and Medical Insurance Carriers
524210	Insurance Agencies and Brokerages
524292	Third Party Administration of Insurance and Pension Funds
531110	Lessors of Residential Buildings and Dwellings
531120	Lessors of Nonresidential Buildings (except Mini-warehouses)
531311	Residential Property Managers
531312	Nonresidential Property Managers
531320	Offices of Real Estate Appraisers
532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing
532220	Formal Wear and Costume Rental
532230	Video Tape and Disc Rental
532411	Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing
533110	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
541110	Offices of Lawyers
541211	Offices of Certified Public Accountants
541213	Tax Preparation Services
541310	Architectural Services
541320	Landscape Architectural Services
541330	Engineering Services
541370	Surveying and Mapping (except Geophysical) Services
541380	Testing Laboratories
541430	Graphic Design Services
541513	Computer Facilities Management Services
541612	Human Resources Consulting Services

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
541614	Process, Physical Distribution, and Logistics Consulting Services
541620	Environmental Consulting Services
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)
541810	Advertising Agencies
541850	Outdoor Advertising
541860	Direct Mail Advertising
541910	Marketing Research and Public Opinion Polling
541921	Photography Studios, Portrait
541922	Commercial Photography
551111	Offices of Bank Holding Companies
551112	Offices of Other Holding Companies
551114	Corporate, Subsidiary, and Regional Managing Offices
561311	Employment Placement Agencies
561320	Temporary Help Services
561330	Professional Employer Organizations
561421	Telephone Answering Services
561440	Collection Agencies
561491	Repossession Services
561520	Tour Operators
561591	Convention and Visitors Bureaus
561612	Security Guards and Patrol Services
561613	Armored Car Services
561720	Janitorial Services
561910	Packaging and Labeling Services
562111	Solid Waste Collection
562112	Hazardous Waste Collection
562910	Remediation Services
562920	Materials Recovery Facilities
562991	Septic Tank and Related Services
611110	Elementary and Secondary Schools
611210	Junior Colleges
611511	Cosmetology and Barber Schools
611512	Flight Training
611513	Apprenticeship Training
611630	Language Schools
611692	Automobile Driving Schools
611710	Educational Support Services
621112	Offices of Physicians, Mental Health Specialists
621210	Offices of Dentists
621310	Offices of Chiropractors
621320	Offices of Optometrists
621330	Offices of Mental Health Practitioners (except Physicians)
621420	Outpatient Mental Health and Substance Abuse Centers
621492	Kidney Dialysis Centers
621910	Ambulance Services
622110	General Medical and Surgical Hospitals
622210	Psychiatric and Substance Abuse Hospitals
623210	Residential Intellectual and Developmental Disability Facilities
623220	Residential Mental Health and Substance Abuse Facilities
623311	Continuing Care Retirement Communities
624120	Services for the Elderly and Persons with Disabilities
624210	Community Food Services
624221	Temporary Shelters
624230	Emergency and Other Relief Services

Table 2 - Under-represented at the County Level Continued*

NAICS code	NAICS code description
624310	Vocational Rehabilitation Services
624410	Child Day Care Services
711110	Theater Companies and Dinner Theaters
711120	Dance Companies
711130	Musical Groups and Artists
711211	Sports Teams and Clubs
711212	Racetracks
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711510	Independent Artists, Writers, and Performers
712110	Museums
713940	Fitness and Recreational Sports Centers
713950	Bowling Centers
721110	Hotels (except Casino Hotels) and Motels
721214	Recreational and Vacation Camps (except Campgrounds)
721310	Rooming and Boarding Houses
722310	Food Service Contractors
722320	Caterers
722330	Mobile Food Services
722410	Drinking Places (Alcoholic Beverages)
722511	Full-Service Restaurants
722513	Limited-Service Restaurants
722515	Snack and Nonalcoholic Beverage Bars
811111	General Automotive Repair
811112	Automotive Exhaust System Repair
811191	Automotive Oil Change and Lubrication Shops
811192	Car Washes
811211	Consumer Electronics Repair and Maintenance
811310	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance
811430	Footwear and Leather Goods Repair
812113	Nail Salons
812191	Diet and Weight Reducing Centers
812210	Funeral Homes and Funeral Services
812310	Coin-Operated Laundries and Drycleaners
812320	Drycleaning and Laundry Services (except Coin-Operated)
812331	Linen Supply
812332	Industrial Launderers
812921	Photofinishing Laboratories (except One-Hour)
813110	Religious Organizations
813212	Voluntary Health Organizations
813312	Environment, Conservation and Wildlife Organizations

*Developed by The Chesapeake Group, Inc. 2014.

*Table 3 - Zip Code Area Level of Retail Goods and Related Services Space and Supportable Space by Sub-category for 2014**

Sub-category	2014 Sales	2014 Space in Sq. Ft.
Food	25,463,000	47,554
Supermarkets	21,261,605	36,037
Independents	2,037,040	5,093
Bakeries	560,186	1,867
Dairies	331,019	919
Others	1,273,150	3,638
Eat/Drink	9,493,000	23,733
General Merchandise	5,007,000	16,333
Dept. Stores	1,772,478	5,908
Variety Stores	360,504	1,387
Jewelry	345,483	487
Sporting Goods/Toys	545,763	1,819
Discount Dept.	1,877,625	6,259
Antiques, etc.	25,035	109
Others	80,112	364
Furniture	1,502,000	4,627
Furniture	226,802	732
Home Furnishings	312,416	893
Store/Office Equip.	237,316	791
Music Instr./Suppl.	64,586	323
Radios,TV, etc.	660,880	1,888
Transportation	23,022,000	66,991
New/Used Vehicles	8,057,700	20,144
Tires, Batt., Prts.	10,152,702	33,842
Marine Sales/Rentals	1,220,166	3,298
Auto/Truck Rentals	3,591,432	9,707
Drugstore	6,645,000	13,290
Apparel	4,997,000	15,552
Men's and Boy's	654,607	1,637
Women's and Girl's	1,659,004	4,484
Infants	104,937	350
Family	1,389,166	4,631
Shoes	1,044,373	3,798
Jeans/Leather	19,988	67
Tailors/Uniforms	89,946	450
Others	34,979	135
Hardware	9,107,000	38,714
Hardware	4,407,788	17,631
Lawn/Seed/Fertil.	173,033	509
Others	4,526,179	20,574
Vehicle Service	11,506,000	28,011
Gasoline	3,912,040	2,698
Garage, Repairs	7,593,960	25,313
Miscellaneous	7,573,000	29,249
Advert. Signs, etc.	121,168	441
Barber/Beauty shop	461,953	2,310
Book Stores	348,358	942
Bowling	174,179	1,742
Cig./Tobacco Dealer	53,011	106
Dent./Physician Lab	302,920	932
Florist/Nurseries	567,975	1,336
Laundry, Dry Clean	257,482	858
Optical Goods/Opt.	181,752	519
Photo Sup./Photog.	522,537	1,493
Printing	613,413	2,231
Paper/Paper Prod.	325,639	1,628
Gifts/Cards/Novel.	1,082,939	3,610
Newsstands	60,584	121
Video Rent/Sales	984,490	4,922
Others	1,514,600	6,058
TOTAL	104,315,000	284,054

*Developed by The Chesapeake Group, Inc. 2014.

Research Examples

Some research examples associated with the areas natural resources are directed to solving the following:

1. Human Medical Issues including but not limited to: asthma, hypertension, blood pressure, anti-anxiety, arthritis, immune system boosters, weight loss, eye health, eye abnormalities, eye implants, cancer, gastritis, stomach ulcers, memory enhancement, heart disease, aging, multiple sclerosis, tumor diagnostics and monitoring progression, wound healing, anti-bacterial/anti-inflammatory/anti-microbial healing, muscular dystrophy, HIV, tooth regeneration, inducing torpor in ICU patients and critically wounded warriors, spinal cord regeneration, type 2 diabetes, melanoma, bone regrowth, epilepsy, Hepatitis E., nutritional supplements, laxatives, antidepressants, menstrual disorders, urinary tract infections, potential therapeutic Human Papillomavirus 16.
2. Manufacturing Opportunities: gelling agents, films, biofuel, nano-technologies, Bio-mimicry Innovation Method, BIM, Micro-Electro-Mechanical Systems (MEMS), Nano-Electro-Mechanical Systems (NEMS), nano-bees, paper, fiber board, yarn and ropes, charcoal briquettes, animal and fish feeds, fertilizers, natural polymers, drug delivery systems, chemical-free pest control, enhanced photosynthesis.
3. Science: climatology, genetic engineering drugs, water quality assessment and management, beneficial uses for invasive aquatic plant species, water purification, phyto-remediation, paleo-ecology.

Additional Resources for Farmers' markets

The USDA Agricultural Marketing Service offers significant technical and financial assistance in the design and development of farmers' markets. As described in the following section of this report the AMS provides technical assistance in Market Facility Development and Design. This assistance includes analysis and conceptual design options. A successful collaboration in the analysis and design of a new community farmers' market could prove to be a valuable tool in gaining USDA grants for the development and operation of the market.

The Florida Department of Agriculture and Consumer Services maintains the Food, Nutrition and Wellness Grants Office which provides relatively small grants to educational and agricultural related community based endeavors.

The Florida Agriculture in the Classroom (FAITC) is offering this school year (2014-2015) an opportunity for individual Florida teachers to apply for \$500 school garden mini grants. The \$500 mini grants are meant to supplement FAITC's Gardening for Grades, a 142-page book that takes Florida teachers through the process of developing a school garden, and includes lessons to help teachers use the garden to teach math, science, language arts and social studies concepts.

The "Fruit Tree 101" is a program that creates outdoor edible orchard classrooms at public schools of all levels, to provide generations of students with environmental education opportunities and a source of organic fruit for improved school lunch nutrition.

Let's Move Salad Bars to Schools is a grassroots public health effort to engage stakeholders at the local, state and national level to support salad bars in schools. The program's goal is to fund and award 6,000 salad bars over the next three years. Any K-12 school district participating in the National School Lunch Program is eligible. The program is an initiative of the Food Family Farming Foundation, National Fruit and Vegetable Alliance, United Fresh Produce Association Foundation and Whole Foods Market.

Young people age 25 and under who are working to start a community action project or program are eligible to apply for a \$500 Do Something Seed Grant. One winner is chosen every week. Grants are targeted toward project ideas and programs that are just getting started. These grants can be used to jump-start a program or to realize ideas for the first time. There is no deadline (<https://www.dosomething.org/grants/database/do-something-1>).

The 2014 Farm Bill provides \$30 million for the USDA's Farmers' market and Local Food Promotion Program through fiscal years 2014-2018. The USDA Agricultural Marketing Service (AMS) is home to many of the Department's leading farmers' market research, technical assistance and grant programs. AMS also manages the Farmers' market Promotion Program (FMPP), a grant program that supports the creation and development of direct marketing outlets and offers a set-aside for projects that initiate the use of electronic benefits transfer (EBT) at farmers' markets.

The AMS maintains a farmers' market webpage providing links to research and technical assistance resources. Specific assistance includes:

- ◇ Technical assistance in Market Facility Development and Design which most often provides analysis and conceptual design options for permanent facilities in collaboration with state and local government or non-profit organizations.
- ◇ Technical assistance in organizing and starting new farmers' markets along with outreach in the form of conferences and training sessions.

Grants designed to facilitate and promote farmers' markets and other direct-to-consumer market channels through the Farmers' market Promotion Program (FMPP). Since its inception in 2006, FMPP has awarded more than \$32 million in grants (<http://www.ams.usda.gov/FMPP>).

Network of Credentialed, Regional Business and Technology Professional Resources for R & D

Regional Technology and Development Entities:

Tampa Bay Technology Forum's purpose is dedicated to growing and promoting Tampa Bay's technology ecosystem. Through events, education, networking, advocacy, and philanthropy programs, it provides targeted forums to bring technology and business leaders, investors, government, researchers and educators together. There are five strategies for TBTF are: Workforce, Entrepreneurship, Member/Sponsor/Board Member Value, Philanthropy and Partnerships.

The Tampa Bay Innovation Center creates successful entrepreneurs, fosters the creation of high-tech jobs, and develops new sources of technology and manufacturing capabilities by nurturing early stage ventures as they grow and launch their products into the marketplace. Its programs are tailored to the innovator/entrepreneur and address business intelligence, planning and business formation, strategy execution, and technology transition.

The Communities of Tampa Bay Industry intelligence Report includes industry leaders: Bausch & Lomb Surgical and Pharmaceuticals; Baxter International; Conmed Linvatec; Cry-Cell International; Discovery Technology International; DMA Print Genomics; Doyen Medipharm; FTSI Gamma Sterilization; GE Medical Systems Information Technologies; Genzyme Genetics; Halkey-Roberts; Laboratory Corporation of America; McKesson Pharmaceuticals; MTS Medical Technologies; NDH Medical; Oscor, Inc. Restorative Care; Rhein Medical; Smith & Nephew; Vanguard Medical Concepts; World Precision Instruments.

Centers of Excellence in the Tampa Bay area include: H. Lee Moffitt Cancer & Research Center; Tampa Bay Technology Incubator; USF Center for Biological Defense; Dr. Kiran C. Patel Center for Global Solutions – Global Health Initiative Research; USF Micro-electromechanical Systems (MEMS) Research Center; USF Research Park; Tampa Bay Research Institute.

Employee Recruitment, Training, Articulation Agreements:

University of Florida's Gulf Coast Research Center (GCRC) is a potential resource for industry collaboration. Its purpose is to develop and disseminate new science-based information and technology that will help Florida's agricultural industry compete in a global marketplace. The UF/IFAS Gulf Coast Research and Education Center, located in the heart of Hillsborough County, is 30 minutes from Dade City, between Tampa and Orlando, offering courses in three programs. The GCRC also has a distance education program, which offers several undergraduate and graduate degrees, located in Plant City.

GCRC's research areas include: agricultural economics, agricultural education, breeding and genetics, entomology and nematology, environmental horticulture, geomatics, horticulture, plant pathology, soil and water science and weed science.

Another research collaborative institution is the nearby University of South Florida, USF, which has transitioned into a major research institution. With three West-coast locations in Tampa, St Petersburg and Sarasota, USF is one of only 40 public research universities nationwide with very high research activity that is designated as community engaged by the Carnegie Foundation for the Advancement of Teaching. Tampa's campus is home to USF Health, a partnership of the Colleges of Medicine, Nursing, Pharmacy, and Public Health. St Petersburg houses the College of Marine Science, and Sarasota hosts educational and cultural institutions such as the John & Mable Ringling Museum of Art.

Researchers at USF are advancing the frontiers of medicine, science, engineering and the arts. The university is a leader in the treatment of brain disease, veteran's reintegration, sustainability, infectious disease and photovoltaic technologies – using cells to transfer energy from sunlight. The USF Pediatric Epidemiology Center, the data and technology coordinating hub for nearly every major Type 1 diabetes clinical trial worldwide, has become the epicenter for global juvenile diabetes research.

The University of Tampa has four colleges: Arts and Letters, Sykes College of Business, College of Natural and Health Sciences, College of Social Sciences, Mathematics and Education. Research is conducted in: Sustainability Environmental and Marine Sciences. The Marine Biology degree includes biological, chemical and physical aspects of marine science, which can be directly connected to several of the potential natural resource R & D described previously.

Remington College in Tampa is another employee recruiting resource. Its programs include Business, Information Technology, Nursing, Criminal Justice and Healthcare.

South University in Tampa offers Associates, Bachelor's and Master's degree programs in Pharmacology, Professional Nursing, Business, Health Care and Behavioral Sciences.

Pasco-Hernando Community College in Dade City offers new businesses a direct link to potential employees. Its Certificate, Associates and Bachelors programs include: accounting, applied technology, applied welding, autoCAD, applied science and supervision management, nursing, business administration, law enforcement, information technology, computer programming, database and e-commerce security, drafting and design technology, e-business, emergency medical services, financial services, fire science technology, health information technology, industrial management, internet services, law enforcement, marketing, medical assisting, computer network technology, office management, paramedic, pharmacy, web development. The college also offers continuing professional education courses for working professionals.

The WREC is an appropriate entity, in cooperation with the County, to assemble or bring such resources to the "table."

Produce and Non-profit Driven Distribution Center Models

Producer-Driven Models - New North Florida Cooperative is a producer-driven distribution model based in the Florida panhandle that has been aggregating, processing, and selling produce in the Southeast since 1999. It sells primarily chopped fresh collard greens, sweet potatoes, and green beans from mostly small-scale minority farmers to 60 independent grocery stores and more than 30 school districts in the Southeast that serve more than 200,000 students. The cooperative is one of the oldest farm-to-school programs in the country and has achieved considerable success by focusing on supplying a handful of food items that are culturally appropriate, easily accommodated into school menus, competitively priced, and require minimal preparation.

Nonprofit-Driven Models - Appalachian Sustainable Development's Appalachian Harvest is a nonprofit-driven distribution model located in Abingdon, VA, that has been selling organic produce to regional supermarket chains and specialty grocery chains in the Southeast and Mid-Atlantic regions for 10 years. This organization works with more than 50 farmers, ranging from market gardeners with less than an acre to commercial farmers with 200+ acres, providing technical assistance, farmer mentoring, and aggregation services. Appalachian Harvest distinguishes itself from California organic produce with its local origin and short field-to-shelf time: "48 hours fresh." Minnesota Food Association's Big River Farms is a nonprofit distribution model based near Stillwater, MN, that provides production and marketing services to aspiring immigrant and refugee farmers. Big River Farms (formerly Big River Foods) was established in 2007 as a "training distribution company" that combines brokering functions and transportation logistics with on-farm production and postharvest handling training. In any given year, Big River Farms works with 8 to 10 farm enterprises in its training program to broker and distribute certified organic fruits and vegetables to supermarkets, food co-ops, and restaurants.

Growers Collaborative is a Limited Liability Corporation established in 2005 to offer aggregation, distribution, market promotion, and education services to California family farms. As a nonprofit-driven distribution model, Growers Collaborative is wholly owned by the nonprofit organization California Alliance with Family Farms, whose mission is to promote small and medium-sized family farmers throughout California with sustainable education, public advocacy, and market development. Growers Collaborative works with a network of over 70 fruit and vegetable producers to increase its access to institutional markets in both southern and northern California. In 2009, Growers Collaborative transitioned from being a full-service distribution company to playing more of a matchmaker role by connecting farmers, aggregators, distributors, and institutional food service operators, and focusing its efforts on providing support services through market promotion and education to local supply chain actors.