



OUT OF MANY, **ONE VOICE**

SECURING FLORIDA'S FUTURE

Six Pillars™ 20-Year Strategic Plan

www.FLFoundation.org

www.TheFloridaScorecard.com

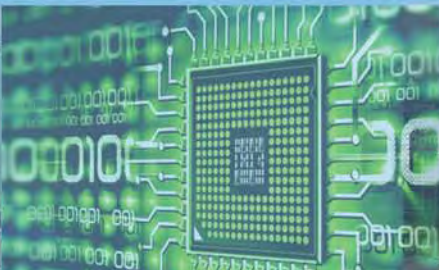




Table of **CONTENTS**

- | | |
|--|---|
| <p>1 LETTER FROM THE FOUNDATION'S CHAIRS</p> <p>2 VISION</p> <p>3 A HISTORICAL PERSPECTIVE AND THE SIX PILLARS™
<i>Dale A. Brill, President, Ph.D., Florida Chamber Foundation</i></p> <p>8 ROLE OF MEASUREMENT AND TRANSPARENCY:
THE FLORIDA SCORECARD
<i>Dale A. Brill, President, Ph.D., Florida Chamber Foundation</i></p> <p>9 NEXT STEPS
<i>Dale A. Brill, Ph.D., President, Florida Chamber Foundation</i></p> | <p>10 ABOUT US</p> <p>11 FLORIDA CHAMBER FOUNDATION'S
SIX PILLARS™ 20-YEAR STRATEGIC PLAN</p> <p>25 THE FLORIDA SCORECARD:
TAKING FLORIDA'S ECONOMIC PULSE
Input versus Output Metrics</p> <p>28 IMPLEMENTATION</p> <p>30 GET INVOLVED</p> <p>31 OUR PARTNERS</p> |
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JANE ADAMS



BENTINA TERRY

A Letter from the Chairs

Dear Fellow Floridians:

We've all heard the clichés – it takes a village, there's strength in numbers, we're strong together. In the case of improving Florida's economy, clichés give way to the power of a consensus-driven plan. Out of many, comes one strong voice delivering a solid framework and solutions to meet the challenges and opportunities facing our great state.

In 2010, the Florida Chamber Foundation launched the Six Pillars of Florida's Future Economy™, with a group of subject-matter experts aligned to each of the Six Pillars of Florida's Future Economy. The Chairs System set out to engage Floridians in a process that would allow Florida workers to move forward. The charge was to develop a long-term strategic plan for the state.

With more than 450 volunteers and nearly 4,000 hours, the power of collaboration has been clearly demonstrated. What you have in your hands is a road map for Florida to create high-paying jobs, foster vibrant communities, and evolve Florida's economy to take its rightful place as a leader among global competitors. This document outlines a brief history of the ongoing work of the Six Pillars programs, the role of The Florida Scorecard in measuring Florida's success to date, and how you can take action and get involved.

We look forward to all of us joining together to be one voice to grow private sector jobs, develop our economy, and preserve Florida's greatest asset, our quality of life. This Six Pillars™ 20-year Strategic Plan has the power to secure a vibrant future for our children, grand-children and beyond.

Sincerely,

Jane Adams
Immediate Past Chair
Florida Chamber Foundation
Vice President, University of Florida

Bentina Chisolm Terry
Chair
Florida Chamber Foundation
Vice President, Gulf Power

Vision

VISION:
Vibrant Communities
Global Competitiveness High-wage Jobs

TALENT SUPPLY &
EDUCATION

INNOVATION &
ECONOMIC DEVELOPMENT

INFRASTRUCTURE &
GROWTH LEADERSHIP

BUSINESS CLIMATE &
COMPETITIVENESS

CIVIC &
GOVERNANCE SYSTEMS

QUALITY OF LIFE &
QUALITY PLACES

Vibrant Communities.

Created by developing quality places to live, learn, work, and play; and, enhancing Floridians quality of life.

High-wage Jobs.

Spurred by creating jobs in targeted industries and supporting innovative sectors of Florida's economy.

Global Competitiveness.

Achieved by expanding Florida's global reach and standing in trade, tourism, and talent.

SECURING FLORIDA'S FUTURE

Since its inception in 1968, the Florida Chamber of Commerce Foundation has been focused on the future of Florida. The Foundation placed a bold stake in the ground in the late 1980s with its influential study entitled *Cornerstone – Foundations for Economic Leadership*. In that report, we called for a repositioning of Florida's economy and economic systems to compete on an international landscape. Several studies followed in the two decades since, including *Enterprise Florida: Growing the Future*; *No More Excuses: What Business Must Do to Help Improve Florida's Schools*; and *International Cornerstone: Serving a Crossroads Economy*; *New Cornerstone: A Vision for Florida's Economic Future*; and most recently, *Florida Trade and Logistics Study*.

These research and policy reports were joined by The Florida Scorecard in 2009, which created the first and only resource for aggregated economic metrics tied to the progress and regress of Florida's economy. The Florida Scorecard paved the way for the introduction of the Six Pillars™ framework, which now guides Florida's strategic planning process, statewide and regionally.

“Sooner or later leadership of the business community will say enough is enough and they will cause change.”

–LANCE DeHAVEN SMITH, Florida State University

A Historical Perspective

Dale A. Brill, Ph.D.

President,
Florida Chamber Foundation

From the Panhandle to the shores of the peninsula, a consensus blueprint for our collective future is emerging. Enabled by a common framework, what once seemed left to fate is now in the hands of engaged business, civic and government leaders who are committed to a common vision of prosperous and vibrant communities reaping the rewards of global leadership.

The notion of strategic planning is hardly new. In fact, dust-filled bookshelves are stacked with plans crafted by citizens no less enthusiastic for their efforts at the time. What makes our work any different?

A quick history lesson reveals the long-standing popularity of economic planning at the national and state levels in the United States. It became evident that planning

would drive national policy and action in the economic development world with the passing of the Public Works and Economic Development Act of 1965, which required the crafting of Comprehensive Economic Development Strategies (CEDS).

Strategic planning came into vogue at the statewide level 30 years later. As typically happens among competitive states, policy trends (or fads) spread among governing bodies. In 1991, the Texas Legislature acted to require each state agency within the executive branch, as well as university system institutions, to develop a six-year strategic planning process; two years later, it shortened the planning horizon to five years. Its stated objective was to provide statewide direction in key policy areas and allow the state to move away from crisis-driven decision making.¹ In the early 1990s, California's State Government Strategic Planning and Performance Review Act mandated that the Department of Finance collect the respective plans of each state agency and went as far as developing

specific guidelines for their development.² On November 3, 1992, Florida voters amended the state's constitution to require a long-term strategic plan be crafted³ foreshadowing a growing conflict between the longer-standing concepts of "comprehensive planning" and "economic development planning" which would come to a head in 2010 with the subordination of the Florida Department of Community Affairs under the Florida Department of Economic Opportunity (DEO). DEO also inherited a requirement to develop the state's five-year strategic plan.

The real promise of strategic planning is its outcome of garnering the intentional and deliberate cooperation of its participants toward the achievement of common goals. Despite the prevalence of strategic planning in the private and public sectors, success is not guaranteed and this blend of art and science is not without its critics.

Detractors of strategic planning cite its lack of demonstrated effectiveness. Plans take months to develop, distracting from the immediate work to be done, only to collect dust. In response, academic researchers and consultants have explored the reasons for such a poor track record (real or perceived). Their efforts point to one key of particular interest to economic developers: the need to include a full-range of participants to secure buy-in and consensus.⁴ This, however, is a question of process. Strategic planning in the public-private sector, particularly planning that involves seeking buy-in and consensus across geographies and political jurisdictions,

presents unique challenges compared to the pure private sector.

Whether we're talking about a statewide plan, regional plan or county-wide plan, the challenge of the strategic planning process rests in the involvement of multiple, independent sets of participants. Counties must corral their respective neighborhoods, stakeholders or municipalities. The challenge rests in creating a consensus plan as competing groups, factions and egos wrestle for control, power or prestige. Any hope of collaboration requires some element of commonality to focus planning participants not only on the problems they face together, but simultaneously structuring the discussion around common solutions.

Enter the Six Pillars

History already identifies 2007 as a year of critical importance to Florida as a turning point for its economy. With an examination of economists' historical data, 2007 marked the nation's turn into the head winds of what is now known as the longest recessionary period since the Great Depression. Early prognoses treated the slow down as a normal revolution of the business cycle. This storm, it was thought, could be weathered as any other. By 2011, the recession's length signaled deeper, structural issues with the economy. Simply put, Florida's long-term economic viability required revisiting the full spectrum of economic factors designed to position the state as a vibrant community offering the prospect of high-paying jobs as a

recognized leader in a global economy. It was acknowledged that any strategic planning process must build on previous efforts and cast a wide net to align the business community with a vast array of partners, including civic and community leaders, in a collaborative effort to address the fundamentals of economic change.

In 2006, at what was still not yet the mid-point of the economic crisis, the Florida Chamber Foundation embarked upon a pilot strategic planning process with the objective of putting the business community back in the leadership position of long-term solutions development. It began with the Innovation Summit, a group of leading experts convened to identify policy options that would both jump-start the economy and evolve the state's economy. In the following year, as the development of the Six Pillars framework matured, a full Six Pillars Caucus System™ launched that relied on the expertise of more than 450 participants over more than a dozen meetings and nearly 4,000 volunteer hours. The result of collaboration across the full spectrum of stakeholders is presented as a first iteration of a 20-Year strategic plan for the Sunshine State.

By 2012, the adoption at the statewide, regional and county levels signaled that the Six Pillars™ framework had reached the tipping point. Despite the roller coaster ride of economic news, Florida continues on the path of developing strategic alternatives with the objective of creating jobs, enabling wealth creation and enhancing quality of life. This work is ongoing at the county, region and state levels with high visibility efforts championed by the Florida Department of Economic Opportunity (DEO), myregion.org, all 11 of Florida's Regional Planning Councils, the Florida Association of Counties, as well as Palm Beach and Broward Counties, among others.

The value of the Six Pillars is driven by two principle shifts in thinking. First, the Six Pillars comprehensive framework forces strategic thinking to embrace the complex components of an integrated economy and weakens the entrenched walls of “silo” thinking. It is a horizontal view of all the elements impacting prosperity, rather than a vertical perspective that fosters isolation and counter-productive initiatives. Second, the common language created by the Six Pillars has made “bubble up” consensus building possible.

A Comprehensive Framework

The Six Pillars is based on the work of a diverse range of stakeholders and research, including some retired entities such as the Governor's Office of Tourism, Trade & Economic Development, and the Century Commission for a Sustainable Future; as well as those still very active in public policy research and development: The Florida Council of 100, Enterprise Florida, The Florida State University System, Workforce Florida, Inc., 1000 Friends of Florida, and many others.

Additionally, research gleaned from the broader academic literature and private institutions also serves to validate the tenet that any effort to build a model for economic prosperity must address the spectrum of contributing factors. The complexity of interactions between economic factors can be witnessed in innovation and economic freedom indices, such as the INSEAD's Global Innovation Index, the United Nations Development Programme's Human Development Index or the Mercatus Center's Index of Personal and Economic Freedom.

A Common Framework

Complexity, however, often prevents the success at the strategic planning level because unique frameworks are developed and applied by the various groups who must eventually collaborate with each other across political or geographic jurisdictions. That is, Counties A and B, both located within State X each may have comprehensive plans, but their effectiveness is immediately stilted by the simple use of different terms and categories. Plans are unable to “talk” to each other and inform broader discussions because they can't be compared or combined. Whether within a large, complex county attempting to bring together multiple municipalities or among counties having embraced regionalism, the inability to build consensus typically ends the usefulness of local strategic plan.

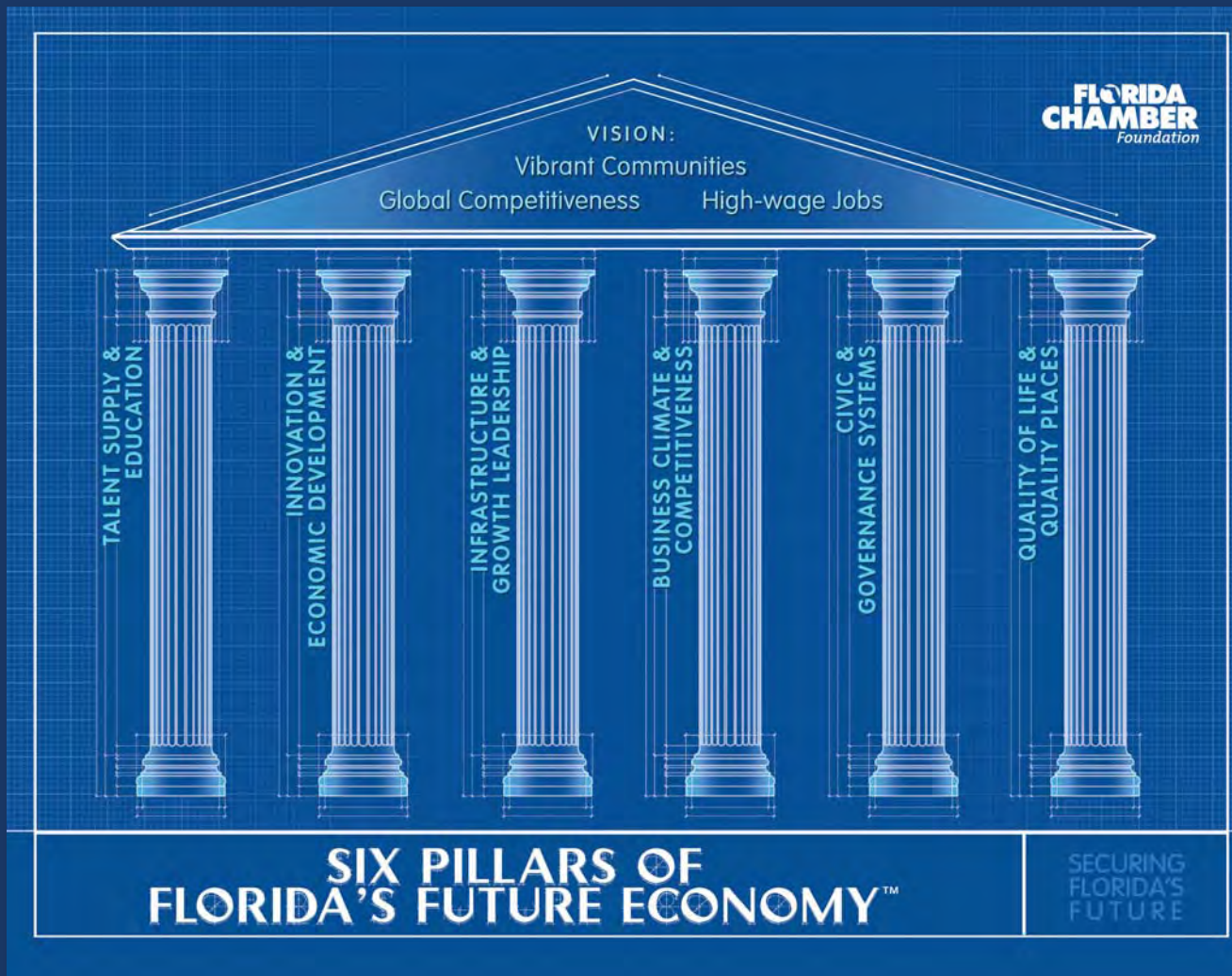
1 www.lbb.state.tx.us/The_LBB/Agency/History.htm

2 www.cdpr.ca.gov/docs/dept/planning/strg_pln/spguide.pdf

3 Article III, Section 19 (h), Florida Constitution

4 For example, see Phillips, Paul A. and Luiz Moutinho (2000), The Strategic Planning Index: A Tool for Measuring Strategic Planning Effectiveness, *Journal of Travel Research*, Vol. 38, May, 369-379

The Six Pillars Framework



The Six Pillars framework resolves the limitation of isolated strategic plans by organizing the essential factors determining Florida's economic future and providing the common language necessary to align the analysis, deliberation and priority setting from different strategic planning processes. The individual Pillars represent human inputs, catalytic systems, material resources, context and institutions comprising the blueprint for wealth creation and prosperity captured metaphorically by six pillars: (1) Talent Supply & Education, (2) Innovation & Economic Development, (3) Infrastructure & Growth Leadership, (4) Business Climate & Competitiveness, (5) Civic & Governance Systems and (6) Quality of Life & Quality Places. A brief description of each is provided below.

Talent Supply & Education:

Florida faces an emerging talent gap — a crisis in human capital that represents a vast and growing unmet need for a highly skilled and educated workforce. In the next two decades, new products and services will be developed to address the world's

most pressing environmental, energy, medical, and transportation challenges. The site of those breakthroughs will reap the economic rewards of leadership. Without a thriving base of knowledge workers, that place may not be Florida. The time to build Florida's future workforce is now, and education and training must be its foundation.

Innovation & Economic Development:

Too often relegated to the academic realms of research institutions, innovation must be every Floridian's business. Competitiveness and prosperity in the 21st century will be based on technology, knowledge and innovation. Transforming our existing business base is the key to retention and expansion. Economic development tied to innovation requires a comprehensive understanding of what is necessary and prudent to incentivize business growth. Demands for return on investment have never been greater. Legacy industries contend with pressure from the creative destruction witnessed as new industries emerge. A fluid view of the role of innovation and economic development is paramount.

Infrastructure & Growth Leadership:

This Pillar underscores the fundamental contributions of factors such as transportation, communications, energy, water and land use to a vibrant economy. Early symptoms, if not addressed, will become crippling diseases undermining the state's economic health. Malnourished ports would turn away

burgeoning international trade. Congested and deteriorating roadways and railways could choke intra- and inter-state commerce. Sprawl threatens the sufficiency of water and energy. This need not be Florida's prognosis. In contrast, smart and timely investments in strategies that are tied to sustainable infrastructure targets are the medicine for a shared economic prosperity for all Floridians.

Business Climate & Competitiveness:

Owners, investors and executives making decisions about where they call home evaluate Florida's attractiveness in respect to its competitiveness across a host of business climate factors. We should too. First, the good news. According to Florida TaxWatch, Florida ranks highly in measures of business climate owing to the absence of a personal income tax; its openness and growth in international trade; and its general hospitableness to entrepreneurs and small businesses. Unfortunately, Florida ranks poorly owing to high business costs, especially property tax burdens, state and local sales taxes, excise and gross receipt tax burdens, workers' compensation, lawsuit reform and general business costs. Vigilance in monitoring our position is critical to anticipating policy changes that secure our position among the most business-friendly climates in the world.

Civic & Governance Systems:

Even the most ardent supporters of free markets recognize the role of structures in place to deliver services, set rules that organize

business and society, and provide vehicles for the public to engage in, influence, and change the way society works. These include things like constitutional integrity, ethics and elections, bureaucratic redundancy, government inefficiency and more.

Quality of Life & Quality Places:

Economic and cultural sage, Richard Florida, underscores the importance of place as an integral component of prosperity. He documents the shift from generations that once chased the job and landed by coincidence in a particular city to the current cohort that selects geography first and then lands the job. Our future depends on the preservation or enhancements of a wide range of integrated elements that together express the robustness of our culture and the positive perceptions of those things that make us healthy, safe, comfortable, secure and involved.

The Six Pillars framework serves as an organizing force for strategic planning at local, regional and state levels. Its real power is in the efficiency of harnessing fragmented viewpoints into a common and consistent conversation. Each Pillar serves to arrange the teams, their data points and ultimately their deliberations in such a way that the process of comparing and combining plans is reduced and simplified. This allows the work to focus on shared priorities and implementation resources, not to mention enabling shared measurement and benchmarking to measure progress, identify best practices and continuously improve.

The Role of Measurement

Joining the implementation of the Six Pillars framework is a commitment to measuring our current status and progress toward stated goals. The Florida Chamber Foundation tracks local and state measures via The Florida Scorecard,TM a dynamic online tool that seeks to identify and track those factors identified within each of the Six Pillars as indicative of our situation. You can view the current version of this tool at www.TheFloridaScorecard.com.

Some important indicators of progress include high school graduation rates, the rate of business formations, water use and efficiency gains, public transit use, building permits, and uninsured residents, just to name a few.

The shared vision statement as adopted from the Florida Chamber Foundation's statewide strategic plan demonstrates alignment with the Six Pillars CommunitiesTM across the state of Florida. Within each of the Six Pillars, stakeholders have identified the goals, strategies and tactics specific to Florida and their communities. Each strategy section identifies a list of champions whose partnership and collaboration is recognized as critical to the implementation of the plan. Metrics, as discussed above, are also identified for incorporation into a measurement system necessary to allow for a data-driven dialogue over the coming months and years to identify progress, regress and gaps between the stated goals and current reality.



Next Steps

With dedication to further aligning the business community with civic and community leaders toward common goals, an annual review process begins each fall with the Future of Florida Forum™ which convenes subject-matter experts and statewide and community leaders to evaluate the current economic environment, explore topics of interest to the state's long-term success and share best practices gleaned from the past year's implementations of regional/local Six Pillars Communities strategic plans.

Each spring, the annual Six Pillars Caucus Retreat brings volunteers back together to exchange policy options for consideration that form the iterative development of the Six Pillars™ 20-year Strategic Plan. Priority policy options are aligned with

the assessment of the current economic and political environment. By mid-summer, Action Plan Committees within the Caucus System have researched and made their best cases for policy

options to be shared with the Florida Chamber's Policy Council in anticipation of its summer-long deliberation process leading to the annual Florida Business Agenda.



2006

- ▶ Launched Innovation & Economic Development Summit

2008

- ▶ Introduced Six Pillars of Florida's Future Economy™

2010

- ▶ Launched all Six Pillars of the Six Pillars Caucus System
- ▶ Launched the Six Pillars Communities Program
- ▶ Established Vision, Goals and Strategies of Six Pillars 20-year Strategic Plan

2011

- ▶ Prioritized Strategies within Strategic Plan
- ▶ Unveiled First Iteration of Six Pillars 20-year Strategic Plan
- ▶ Jackson and Palm Beach counties, and myregion.org Considered Certified Six Pillars Communities

2012

- ▶ Caucus Action Plan Committees Established
- ▶ Caucus Policy Recommendations Shared with Florida Chamber's Policy Council for Consideration
- ▶ Unveiled Second Iteration of Six Pillars 20-year Strategic Plan
- ▶ Florida Department of Economic Opportunity, Florida Association of Counties and Florida Regional Planning Councils Considered Certified Six Pillars Communities

About Us



Founded in 1968, the Foundation is a business-led, solutions development and research organization, working in partnership with state and community business leaders to secure Florida's future. The Foundation's Six Pillars framework serves as a visioning platform for developing a long-term strategic plan for the state. The Six Pillars identify the critical factors determining Florida's future and provides a platform for local, regional and statewide collaboration.

The Florida Chamber of Commerce is comprised of three areas with a shared agenda and is built on a long-term vision. The Florida Chamber Foundation focuses on identifying challenges and opportunities, and crafts **SOLUTIONS** to help secure Florida's future. The Florida Chamber of Commerce takes **ACTION** based on the analysis and output from the Foundation. The Florida Chamber Political Operations develops **LEADERSHIP** in the political arena to address tough issues with real solutions.

There needed to be one framework for the business community, and the Six Pillars for Florida's Future Economy provided that. Metrics and benchmarks illustrate the state's progress (or regress) toward goals in the plan, and The Florida Scorecard is the tool that provides that measurement platform. The Florida Chamber put the Foundation out in front with the Six Pillars and The Florida Scorecard and positioned the rest of the Florida Chamber enterprise to support the Six Pillars.

Florida Chamber Foundation's Six Pillars 20-Year Strategic Plan

This iteration of the Six Pillars 20-year Strategic Plan represents several years of collaboration and consensus building among members of the Six Pillars Caucus System. This plan is a living document and collective guide to achieving our vision. It will take the dedication and energy of the Six Pillars Caucus members and hard work of government, civic and business partners from around the state to act on the ideas outlined within the plan. The Florida Chamber Foundation will continue to provide the common framework, collaborative environment and concrete measures to help our partners achieve success.

The Foundation will update this evolving plan, support community and regional strategic efforts, and provide information and guidance to partners across the state. The comprehensive list of strategies and tactical options for this plan can be found by visiting www.FLFoundation.org/SixPillars.

The Florida Chamber Foundation is proud to present the next iteration in Florida's long-term strategic planning process. This strategy document is not a set and rigid plan, but rather a flexible framework and a common language to harness our collective knowledge and focus our cooperative efforts.

The Six Pillars 20-year Strategic Plan reflects the many voices of business, civic, and public leaders participating in the Florida Chamber Foundation's Six Pillars Caucus System. When combined with the power of The Florida Scorecard, the common framework provided by the Six Pillars enables clearer direction and consensus objectives to emerge, which achieve our collective vision for Florida's future:

- ▶ **High-wage Jobs:** Spurred by creating jobs in targeted industries and supporting innovative sectors of Florida's economy.
- ▶ **Vibrant Communities:** Created by developing quality places to live, learn, work, and play; and, enhancing Floridians quality of life.
- ▶ **Global Competitiveness:** Achieved by expanding Florida's global reach and standing in trade, tourism, and talent.

This vision and the Six Pillars of Florida's Future Economy are supported by broad, but critical objectives, each which may be achieved through a variety of actions, strategies, and tactical priorities.

This inventory will enable you to learn what others are doing, to adapt strategies appropriate for your community or region, and prepare you to act, so that together we are all working toward our common vision. The leadership of the Florida Chamber Foundation's Board of Trustees will provide the long-term vision; the Six Pillars Caucus System will identify the necessary actions and partners; the Six Pillars will stand as the common organizing framework; and the Florida Scorecard will measure success – but we need your help in securing Florida's future.



Talent Supply and Education

TALENT SUPPLY AND EDUCATION

Florida's future rests with the next generation. Tomorrow's economy will be lead by developments in science and technology that are applied to create new products, provide new services, enable new manufacturing processes, deliver to new markets, and speed new choices to consumers. Innovative businesses will locate in states with a robust and effective learning system, a steady stream of university research, and a ready base of knowledge workers. Those states that do invest in their youth, upgrade the skills of current workers, and rethink how our schools can meet their goals will hold the advantage in the future innovation economy. Without a deep pool of knowledge workers and rich educational environment, Florida may not be among those states leading the next American economy.

Six Pillars Caucus members are dedicated to Florida's future students. While we've made great strides as a state in recent decades, we know we have a long way to go to prepare the next generation, but believe we can get there.

● OBJECTIVE:

Develop an Effective, Accountable, and Innovative Public-Private Education System in Florida

Students coming up through Florida's education system today are the workers of tomorrow, yet many are not ready to learn when entering school and not ready to work after graduating. Quality and accountability in our kindergarten programs, grade schools, and colleges and universities has improved in the last decade and Florida's education system is a national model in some respects. However, we still fall below the national average in

critical math, science, and reading skills. To meet the future workforce needs, attract new residents, and provide opportunities for our children, we must focus on developing effective and accountable programs, introducing innovative tools and policies, and leverage public-private partnerships.

Strategies:

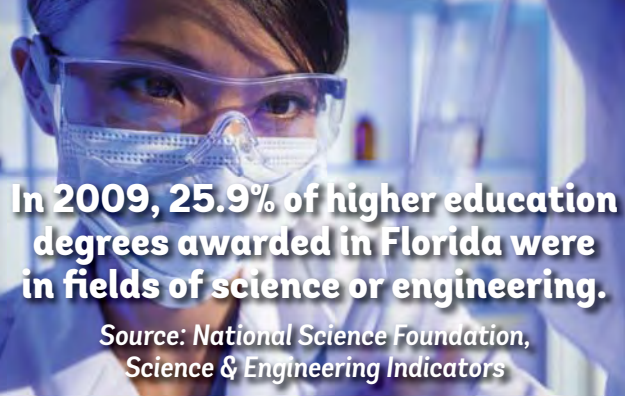
- ▶ Leverage public and private resources to creatively finance capital investment
- ▶ Develop effective accountability standards and incentive programs
- ▶ Support School Choice
- ▶ Create a children's trust to bring together public and private resources in a positive, productive manner

● OBJECTIVE:

Align Florida's Pre-K to 20 Education System with the Future Economy

Florida faces an unprecedented skills gap and an emerging, yet unmet, need for knowledge workers in growth industries. Jobs of the future will demand skills in math and science, require continuing training, and ask workers to think critically and communicate thoughtfully.

Importantly, our schools must focus on engaging youth and advancing STEM skills – the groundwork in science, technology, engineering, and math education that is so critical to future success in the workplace. Aligning our public education system with the needs of today's businesses and tomorrow's industry leaders means encouraging learning from the earliest ages, developing opportunities for hands-on learning, career building, and credential earning while in high school, and



In 2009, 25.9% of higher education degrees awarded in Florida were in fields of science or engineering.

Source: National Science Foundation, Science & Engineering Indicators

increasing the number of students graduating from Florida colleges and universities with industry-recognized training.

Strategies:

- ▶ Implement world-class early learning and Pre-K programs
- ▶ Implement Flexible Starts Enrollment and provide for seamless transitions
- ▶ Increase post-secondary degrees and industry credentials earned
- ▶ Enhance STEM education at all levels

● OBJECTIVE:

Implement a Demand-Driven Workforce Development System in Florida

Many jobs go unfilled in Florida and many companies can't find qualified workers, even as hundreds of thousands of people are searching for work. The skills of the current workforce and the technical abilities of recent graduates are not always matched with what employers are looking for. Businesses rely on the education system to

prepare students to learn and look to the workforce system to train workers to lead. Yet, the workforce system as it exists today is not responsive to the needs of businesses and too complex to be used by many companies.

Florida must align its workforce systems as we meet the needs of fast changing labor markets and rapidly evolving business needs if we are to transition to an innovation economy. Business involvement in schools and in workforce programs can help ensure that students are engaged early on and that once graduated, have the credentials that are valuable to employers.

Education and workforce development efforts can be better targeted to close industry-specific skills gaps and to develop pathways for careers in critical growth and innovation industries.

Strategies:

- ▶ Align workforce development systems with Florida's changing labor markets and business needs to transition to an innovation economy
- ▶ Engage business in Pre-K to 12 education through career academies, project-based learning, internship and externship opportunities, and the Career and Technical Education system
- ▶ Build a critical mass of skilled knowledge workers in target industry clusters and innovation industries by targeting education and workforce development efforts to close industry-specific skill gaps

Talent Supply and Education

In 2012, Florida's workforce and training system was ranked number one in higher education efficiency and Advanced Placement (AP) testing among high school students.

Source: U.S. Chamber of Commerce, Enterprising States Report

Go to www.TheFloridaScorecard.com and click on 2030 Metrics to view a comprehensive list of metrics aligned to the objectives and strategies within the Six Pillars 20-year Strategic Plan.

To review the actionable tactical components of the Six Pillars 20-year Strategic Plan, go to www.FLFoundation.org/SixPillars.



Innovation and Economic Development

Florida's total economic activity in 2011, measured by gross domestic product, ranks 4th in the United States at \$754 billion.

Source: Bureau of Economic Analysis

INNOVATION AND ECONOMIC DEVELOPMENT

Florida's future is an innovation economy. It is no longer inputs of raw materials, labor, and capital that drive economic growth, but knowledge, technology, entrepreneurship, and education. These are not independent inputs that are unaffected by policy decisions, rather they are often the product of smart and forward thinking policy choices. Innovative global and regional economies leverage educational assets, foster entrepreneurship, and support knowledge and technology-based industries. Florida's historical economy is waning, but Florida's innovation economy can boom – driven by research and development and technological advances in established and emerging industries.

For Florida to be a leader among global economies, we have to pursue an economic development vision focused on private sector job growth driven by innovation.

● OBJECTIVE:

Pursue a Statewide, Coordinated, and Sustained Economic Development System for Florida

Economic development can mean many things to many people and innovation must be more than a buzz word. Florida's public agencies, development organizations, universities, professional associations, business organizations, and legislators must develop and pursue a coordinated and sustained agenda aimed at building Florida's future innovation economy. Many state and local organizations have adopted the Six Pillars to draft their own strategic plan, including the Florida Department of Economic Opportunity, myregion.org, all 11 of Florida's Regional Planning Councils, Florida Association of Counties, as well as growing list of independent efforts led by Jackson, Palm Beach, Broward, Okaloosa, and Martin counties. Out of many individual efforts, the Six Pillars framework provides Florida's economic development community with one voice.

Strategies:

- ▶ Implement a statewide innovation-focused economic development strategic plan and appoint a Chief Innovation Officer for the state
- ▶ Evaluate and adjust Florida's economic development incentives to best support Florida's future innovation and international trade-based economy.
- ▶ Develop a systematic approach to economic development education for legislators and leadership
- ▶ Actively market Florida as the state for innovation industries and international businesses in the 21st century

● OBJECTIVE:

Enhance Florida's Position as a Global Hub

Today's global economy recognizes no borders and Florida is growing as a destination for international visitors, a center of foreign investment and capital, and a major transport hub for goods and people. The Florida Chamber of Commerce has long supported a goal of doubling the value of goods produced for export by Florida businesses. To continue to grow exports and attract imports, we must improve our international business climate, expand business development efforts, and develop essential multi-modal transport hubs, links, connections, and systems.

Strategies:

- ▶ Support the export potential of Florida businesses in both traditional and high-value goods and services by enhancing the state's international business climate and developing multi-modal transportation systems
- ▶ Develop Florida's global connections through federal and state advocacy
- ▶ Expand the reach and impact of state international business development efforts

◎ OBJECTIVE:

Grow, Attract, and Retain Innovation Businesses in Florida

Essential to building and sustaining Florida's competitiveness in the global economy is our ability to grow new businesses and attract others. In the innovation economy, the seeds of new businesses are ideas. Ideas sprout in the rich environment of research and development, feed on supplies of talented workers and venture investments, and grow with the continued support of regional and state institutions and policies. Florida can better support this entrepreneurial ecosystem by creating partnerships, coordinating efforts, and enhancing funding programs related to research and development, talent supply, and start-up opportunities. Doing so will allow Florida to attract and retain the talented workers, high-growth firms, and institutions responsible for the next big ideas of the innovation economy.

Strategies:

- ▶ Build Florida's entrepreneurial ecosystem by enhancing funding and investment, coordinating regional efforts, and expanding infrastructure and opportunities for start-ups
- ▶ Dramatically increase early and seed stage funding for business ventures by establishing the Florida Technology Seed Capital Fund
- ▶ Create a state network of regional innovation organizations based on the Florida High Tech Corridor Council model

◎ OBJECTIVE:

Raise Florida's Research and Development Capabilities and Standing

Florida must promote research and development to keep our ideas and our intellectual property - and the new business opportunities and jobs that come with it - in Florida. Without the support of public programs or venture firms, new products or technologies in the early stages of development may take years to fully develop, if at all; or worse yet, be developed elsewhere. Research and development supports innovation in Florida's existing and emerging industry clusters, makes the most of the teaching and research strengths of our research universities, and capitalizes on the significant activities of our private research labs and hospitals.

Florida must find ways to creatively enhance the amount and availability of research funds and commercialization opportunities and develop the talented STEM workforce necessary for firms to capitalize on research.

Strategies:

- ▶ Provide support to business and academic grantees to improve Small Business Innovation Research and Small Business Technology Transfer (SBIR/STTR) award rates
- ▶ Fund a coordinated, statewide Matching Grants Research Program to leverage private investment in research and development
- ▶ Support university and industry collaborations by focusing on technology transfer and commercialization opportunities

Innovation and Economic Development

The value of Florida origin exports reached \$64.8 billion in 2011.

The three largest international markets for Florida goods were Switzerland (\$7.3 billion), Brazil (\$5.3 billion) and Canada (\$4.0 billion), respectively.

Source: U.S. Census Bureau of Foreign Trade; International Trade Administration

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Infrastructure and Growth Leadership

INFRASTRUCTURE AND GROWTH LEADERSHIP

Florida's global economy is supported by the transportation networks that connect people to jobs and businesses to customers and by the energy and water supply systems that keep our shops open and homes functioning. Investing in this essential support infrastructure is necessary to meet Florida's long-term needs, to enhance our business climate, and to lower costs of doing business and living in our state. In tandem, we have to be smart about how we approach land development, housing, land conservation, and environmental protection decisions, so that we don't strain supporting infrastructure systems, don't deplete vital resources, and don't damage the natural areas that bring so many new residents, visitors, and businesses to Florida.

Six Pillars Caucus members, small business, and chambers of commerce, are engaged in growth leadership from every perspective – state agency leaders, private utility providers, wildlife and conservation advocates, and community development experts. We realize that by making smart choices and investing in Florida's infrastructure today, we can better meet the demands of tomorrow and better balance important state goals.

● OBJECTIVE:

Provide Integrated and Multi-Modal Transportation Networks in Florida

Florida's future innovation economy requires a multi-modal transportation system able to move both people and freight efficiently and reliably. The Florida Chamber Foundation's *Trade and Logistics Studies* demonstrated that connections to global markets will help us maximize our potential as a

Florida spent an average of \$282 on state highway spending per person in 2010, which was the 40th highest average in the nation.

*Source: U.S. Census Bureau,
2010 Survey of State Government Finances,
Calculations by The Taxpayers Network*

global hub and trade corridor. Linking Florida's regions strengthens supply chains, distribution networks, and business relationships. Multi-modal options helps build vibrant regional economies and industry clusters by providing travel choices to businesses, universities, attractions, and other economic assets. We must make necessary investments in multi-modal transportation infrastructure to meet Florida's future needs, and do so with fewer resources through public-private partnerships, smart choices, new technologies, and innovative financing.

Strategies:

- Develop multi-modal transportation systems to support a prosperous and globally competitive economy
- Protect and expand public and private investments in multi-modal transportation systems

● OBJECTIVE:

Facilitate Collaborative Growth Leadership in Florida

Florida is one of the most rapidly developing states in the country, but that growth was largely unplanned until recent decades. Being smart about how we develop and grow helps maintain property values, supports jobs in busy downtowns

and rural centers, saves infrastructure costs and public dollars, and enables us to meet the needs of future Floridians. State and local public, civic and business leaders can design strategies and facilitate collaborative growth leadership that works for all. With smart policies in place and revised regulations, we can build Florida's future while promoting quality investments, eliminating red-tape and streamlining permitting, protecting our natural assets and existing communities.

Strategies:

- ▶ Restructure growth management processes and governance
- ▶ Create a customer-driven development incentive tool box
- ▶ Encourage and support regional partnerships

● OBJECTIVE:

Preserve and Enhance Florida's Natural Environment

Abundant natural resources put Florida on the map and established significant industries in the state. These natural resources are still among some of our most important economic assets. State game areas, rivers, and bays bring in sports enthusiasts and support local economies. Wetland areas, drainages, and ecosystems filter our water and air and perform other important ecological functions that we might otherwise have to pay for. And our coasts, national landmarks, and scenic wonders draw visitors from all over the world.

We can preserve these natural assets for future use and future generations by working with landowners and using innovative policies and programs. We can enhance access to natural areas to boost tourism, trade, and new destination industries while also working to sustain the invaluable natural functions of these ecosystems.

Strategies:

- ▶ Identify incentives, regulations, and tools that support state and regional environmental preservation and enhancement goals
- ▶ Balance and pursue both natural environment protection and sustainable economic development

● OBJECTIVE:

Supply Florida with Reliable and Reasonably Priced Energy

Florida's population will continue to grow, surpassing New York to be the third largest state in the nation sometime in the next few years. Our energy needs, already among the highest in the country, will similarly increase. We need reliable and competitively priced energy to light our homes and power our businesses, now and in the future. But policy makers shouldn't pick one energy source over another, artificially create markets, subsidize technologies, or play politics with Florida's energy future.

Infrastructure and Growth Leadership

**Floridians drove an
average of 10,214
vehicle miles in
2010, which is
29th highest
among states and
above the national
average of 9,479
vehicle miles
annually.**

*Source: RITA, State
Transportation Statistics
2010. Calculations by
The Taxpayers Network*

Infrastructure and Growth Leadership

Florida should pursue a smart and diversified approach to securing our future energy needs. We can focus public and private investment on the research, development, and commercialization of energy solutions for both the supply-side – by generating energy from all available sources – and the demand-side by conserving energy and using alternative fuels. The state must first set a vision and establish a clear path to future energy security.

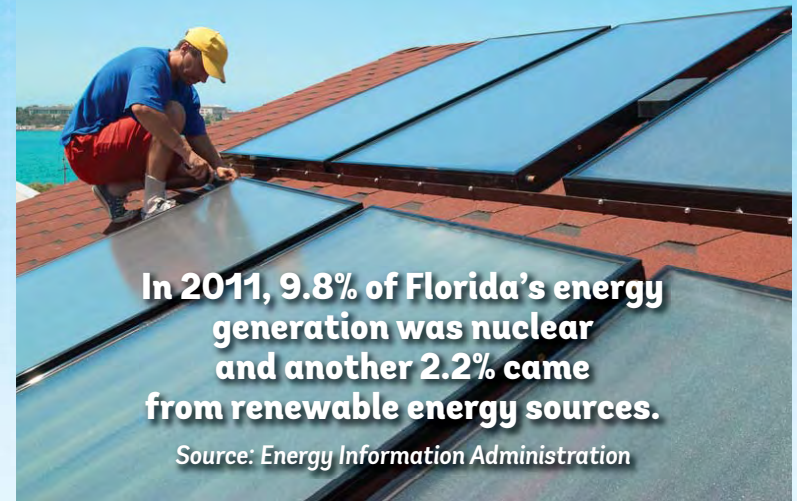
Strategies:

- Establish a comprehensive and integrated state energy policy
- Maintain cost-effective reliability standards and improve overall system efficiencies

● OBJECTIVE:

Ensure Florida's Supply of Available and Clean Water

Water may well be a critical limiting factor of economic growth in fifty years. Those areas and economies with access to fresh water supplies will thrive and those without will likely go to war. For Florida, surrounded by water, but with limited freshwater supplies, investments must be made in conservation, supply, and quality. Our drinking water systems, the pure water needed in manufacturing applications, the waters that feed our crops, as well as the waters we fish, swim, and



boat in are all connected. And our supplies are not endless as the enormous aquifers and wetland areas we rely on must have time to recharge.

Florida's water consumption levels, once much higher than the nation, have come down over the past decades as we employ smarter water use. But to ensure our future economic growth and security, we'll have to get smarter about how we use, invest in, and protect our water supplies.

Strategies:

- Develop a comprehensive and integrated state water policy
- Secure funding for water system and water quality investments
- Improve water quality and supply in a cost-effective manner

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BUSINESS CLIMATE AND COMPETITIVENESS

The terms business climate, entrepreneurial ecosystem, economic gardening and job growth all share a common botanical metaphor because new businesses and industries don't just spring up by accident, they must be nurtured and can easily be killed off. Florida's competitive position relative to other economies in the U.S.

and across the globe is a product of how well the state steps in to support business growth and how well it steps out of the way to let more light in. Florida does fare well on some measures of economic freedom and taxation levels and less so on other measures

of cost of doing business and legal and regulatory barriers. But we lost our low-cost advantage decades ago and we have to work to get it back.

Six Pillars Caucus members are committed to keeping Florida open for business and know that the state's regulatory framework, tax structure, and economic development incentives need a new, hard, and long look to bring us into the 21st century.



OBJECTIVE: Streamline Regulations for All Businesses in Florida

Government regulatory processes protect citizens, secure intellectual property, ensure that markets function, and provide the necessary structure in a global economy. Yet, too often some regulations become burdensome, misguided, or outdated and other decision

making processes just don't move at the same speed as business. Delays in permitting, licensing, or approval have real-world impacts on investment decisions. Regulations that haven't kept up with the speed of innovation in the economy present barriers to new business

ventures or prevent ideas from getting off the ground. Businesses running on slim margins, and, especially in tough times, can't afford needless hurdles and hoops. And businesses do look at state and local regulations when deciding when and where to expand and add jobs. We owe it to our state's job creators to take a fresh look at the regulatory framework, to see how it compares, and to make whatever changes are necessary to grow and retain companies right here in Florida.

Strategy:

- Conduct a comprehensive and continuous review of all regulatory processes that impact business and intra-governmental regulations in the state and provide solutions that address barriers

Business Climate and Competitiveness

The liability and litigation systems in Florida ranked 42nd in the nation according to a 2010 study by the Institute for Legal Reform.

*Source: U.S. Chamber Affiliate
Institute for Legal Reform,
2010 State Liability
Systems Ranking*

Business Climate and Competitiveness

In 2011, Florida ranked 8th best in the nation on the Small Business Survival Index, which measures major government related costs that affect small businesses and entrepreneurship.

Source: Small Business & Entrepreneurship Council

● OBJECTIVE:

Revise Florida's Tax Structure to Balance Fundamental Services with Economic Growth

Taxes are an influential and substantial policy tool that can steer private investment, shape community development, open new markets, and encourage industry growth – or can do the complete opposite. Florida's state agencies are beginning to work together to better align education, workforce, and economic development initiatives that support the state's overall strategy. So too should Florida's tax codes and incentives be aligned to support statewide strategic investments, growth in targeted industries, job creation goals, and public priorities. In this economy, we can evaluate and restructure Florida's overall tax structure to best provide needed investments and support state priorities and public goals.

Strategy:

- Evaluate Florida's tax structure and modify to support the state's priority of business development and job creation

● OBJECTIVE:

Support Growth in Florida's Target Industry Clusters

Enterprise Florida's statewide roadmap for economic development, the Florida Department of Economic Opportunity's five-year Six Pillars strategic plan for economic development, and regional economic development organizations across the state are focused on developing regional strengths in target industry clusters.

Florida has developed substantial competitive advantages in aerospace, biotechnology, life sciences, advanced manufacturing, information technology, and business services. These sectors represent opportunities for future growth but state support, policies, and incentive programs must be coordinated in order to realize these opportunities. Florida must focus and sustain efforts to develop competitive clusters. We can do this by resolving critical business issues, eliminating growth barriers, realigning incentives and providing a competitive business climate that best supports future economic growth.

Strategies:

- Resolve critical business issues, eliminate growth barriers, and provide a competitive business climate to support growth in target industry clusters
- Re-align business incentives to be competitive in strategically targeted areas, industries, and markets linked to the future innovation economy

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CIVIC AND GOVERNANCE SYSTEMS

Our civic and governance systems play an important role in today's economy and society. Our public institutions provide the systems to deliver essential services, set the rules that organize business and society, establish a fair playing field, and provide venues for the public to engage in, influence, and change the way things work. Regardless of political persuasion, we are likely to agree that government has an essential role in modern day society, but that government responsibilities can constantly be improved and refined. And our state and local governments are made up of leaders from our own communities. Engaged political, business, and community leaders, informed dialogue and public debate, and a functioning civic infrastructure are essential in our democracy. To meet today's challenges and provide solutions for tomorrow, we must cultivate leaders, engage youth in their communities, and promote participation in civic affairs.

● OBJECTIVE:

Create a Culture of Informed Civic Engagement and Participation

Florida's future voters, scientists, business owners, athletes, teachers, politicians, and community leaders are the youth of today. But to be one of these everyday heroes means being a citizen of your school, town, region, state, and global community. Citizens actively engaged in our communities are vital, not just because engagement fosters trust in public institutions and legitimacy in political processes, but also because it is correlated with a strong educational system, a competitive workforce, and a dynamic economy.

Florida has one of the lowest rates of civic health and volunteerism in the nation – 49th lowest to be exact. In 2010, just 20 percent of Floridians volunteered in their communities. And measures of engagement among youth are decreasing in Florida and across the nation. In a society increasingly virtual and cluttered with noise, it is critical to encourage youth to become informed, to participate, and to engage with the world around them. Much as a scientist must work in the laboratory to fully grasp physical principles and their consequences, young citizens need a laboratory where they can learn about collective action and how collective needs can be addressed in a democratic system. Local governments, nonprofits, service organizations, advocacy groups and corporate partners are core elements of the community that can offer young people a living laboratory where they can learn the skills that they need to shape Florida's future in a positive way.

Strategies:

- ▶ Promote civic engagement and civil discourse
- ▶ Encourage diverse voices and interests in civic affairs

Voter participation in Florida, which reports the number of citizens over the age of 18 who voted in previous election versus those eligible, was 63.8% in 2008.

Source: U.S. Census Bureau, Voting and Registration

Civic and Governance Systems

Florida had 262 reported violent crimes per 100,000 residents in 2010, which ranked the 5th highest among states.

Source: Federal Bureau of Investigations, Crime in the United States 2010 Report, Calculations by The Taxpayers Network

Civic and Governance Systems

Florida had a public welfare expenditure of \$1,111 per person in 2010, which ranked 45th highest among states.

Source: U.S. Census Bureau, Calculations by the Taxpayers Network

● OBJECTIVE:

Improve Public Transparency and Accountability

Government derives power from the consent of people. As citizens we place our trust and confidence in our elected officials and public institutions and we expect much in return. Florida has made improvements in introducing accountability, performance measurement, and outcome-based approaches in policies and programs. Yet, we still have a ways to go to make government efficient, effective, transparent, and accountable to 'we the people.'

Strategies:

- ▶ Identify and share best practices in election reform
- ▶ Strengthen enforcement of laws related to government fraud
- ▶ Further restrict the ability to impose unfunded mandates

● OBJECTIVE:

Modernize State Government

Florida's policy process depends on efficient state and local governance. Cities, counties, and school districts have duly elected officials tasked with meeting the needs of their constituents. State agencies and legislators provide funding, strategic direction, or program reforms to provide essential services and make investments in Florida's future. Yet, too often our public entities are burdened by state and local conflict, fragmented by overlapping

boundaries and multiple organizations, and weighed down with complex and slow permitting, regulatory, and decision-making processes.

The best governance Florida can have isn't necessarily less or more, but just smart and efficient. Government must be equipped with the resources to accomplish their mission, move at the speed of business, efficiently meet the needs of the public, and cooperate or consolidate across boundaries. Public resources are increasingly limited, and it is imperative that policymakers demand bold new thinking to achieve efficiencies in delivering high-quality services to constituents throughout Florida.

Strategies:

- ▶ Convene an intergovernmental commission to recommend and implement efficiency and effectiveness improvements in government
- ▶ Improve cooperation among all levels of government
- ▶ Further restrict the ability to impose unfunded mandates



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QUALITY OF LIFE AND QUALITY PLACES

The collective strategies and work being accomplished in each of the Six Pillars leads to improving the quality of life of every Floridian and building the foundation for quality places in every Florida community. By advancing the quality of our education system, we can make it easier for companies to attract talented workers, and their families, to Florida. By supporting innovative and globally competitive industry clusters we can provide high-wage jobs and exciting career opportunities for workers who want to live in vibrant economies. By investing in efficient and essential infrastructure, conserving natural assets, and building communities of choice, we can make Florida a great place to live, learn, work, and play for future generations. By making it easier to start, run, and grow a business in Florida, we can help successful companies provide good jobs and reinvest in their community. By running government smartly, encouraging civic engagement and philanthropy, and leveraging our cultural assets, we can make sure Florida's communities are thriving, healthy, happy, and diverse global destinations.

The Six Pillars Caucus System recognizes that in many ways, to achieve quality of life underpins our

efforts in every other Pillar and vice-a-versa. We also know we can provide world-class opportunities for all Floridians, and here's how.

● OBJECTIVE:

Establish Florida as a State to Learn, Live, Work and Play

Florida is recognized worldwide as a tourist destination. Yet, when people think of Florida, we need them to think not just of surf, sand, and sun, but also as place where they want to come to get a great education, to raise a family, or to run a business. For Florida to prosper in the 21st century, we must effectively promote the state as a great place to learn, live and work. We have to change how our state is perceived, and that begins with changing the fundamentals of what our state offers.

Strategies:

- Create a comprehensive, coordinated, and unified state brand
- Embrace and protect Florida's diversity of peoples, cultures, and backgrounds

● OBJECTIVE:

Preserve and Build Florida's Vibrant Communities

From the First Coast to the Nature Coast, from the Treasure Coast to the Emerald Coast, from Tampa Bay to Biscayne Bay, and from the Heartland to Old Florida – we have so many culturally and geographically unique communities to call home. We're all proud of our unique parts of Florida and it's important to preserve and build up our communities for future generations. To do so, we

Quality of Life and Quality Places

Annual average wage, or the income earned from wages and salaries per capita in Florida was \$42,310, over \$5,000 below the national average in 2011.

Source: U.S. Bureau of Labor Statistics



Quality of Life and Quality Places

The homeownership rate in Florida was 69.3% in 2010, which ranks 27th in the nation.

Source: U.S. Census Bureau, Housing Vacancies and Homeownership

must revitalize and reinvest in our communities so that they are sustainable, accessible, affordable, welcoming and provide a great array of living choices for every Floridian.

Strategies:

- ▶ Revitalize communities through sustainable infrastructure, redevelopment, and investment choices
- ▶ Strengthen the role of community-based development organizations

OBJECTIVE:

Leverage Florida's Natural and Cultural Assets to Support Economic Development

Some states have national wonders, others have museums, and many have beaches, but Florida has all of those and more. Residents and visitors travel to Florida for a wide variety of reasons, largely because there is no shortage of things to see and do. Our national parks, state wildlife management areas, regional trail networks, and county conservation areas bring in visitors, provide for business opportunities, and perform important ecological functions. Cultural and performing arts centers in major cities and rural communities draw residents and visitors, spur consumer spending, and draw local and global investment. Arts events and historical structures in Florida cities are major global draw; and arts and humanities in our school system spur creativity in our students, an essential ingredient in an innovation economy.

Strategies:

- ▶ Promote and develop Florida's creative individuals, organizations, and industries
- ▶ Protect and leverage Florida's natural resources and cultural assets

OBJECTIVE:

Achieve Nationally Recognized Levels of Health and Wellness for Florida Residents

Rising healthcare costs and staggering incidences of obesity, heart disease, and illness threaten job productivity and the longevity of Florida residents and the solvency of Florida businesses. These significant trends represent a call to action for Florida to improve the health and wellness of Floridians where they work, live and learn. Public, private, and community partners can work together to build an economic case for why healthy living matters, to provide clear information to the public, to advance community-based health initiatives, to encourage wellness programs, and to introduce clear standards and outcome for our health investments. Good health is good business.

Strategies:

- ▶ Support a culture of health and wellness among Floridians to control healthcare costs and enhance quality of life for residents
- ▶ Support sustainable and community-based health initiatives
- ▶ Develop healthcare policy that enables business growth

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The Florida Scorecard Taking Florida's Economic Pulse

While the Six Pillars framework offers a powerful tool for strategic planning at all levels, the Florida Chamber Foundation's objective to develop a statewide, 20-year Strategic Plan requires a commitment to measuring the current status and progress toward stated objectives in the plan. The Florida Scorecard seeks to identify and track those factors within each of the Six Pillars to secure Florida's future.

The Florida Chamber Foundation's Econometrics Council, or ECouncil, is comprised of some of the top economists in the Sunshine State. This elite group of experts supports the efforts of the Six Pillars Caucus System by providing recommendations on the metrics related to the Six Pillars 20-year Strategic Plan. The ECouncil generates the metrics and relies on the Caucus Steering Committee's feedback for final approval.

The Florida Scorecard serves as a cutting-edge measurement product designed to gauge Florida's economic progress. Unlike other data clearinghouses, the Scorecard is comprised of economic expertise to measure the "real" conditions present within the state's economic system. The Foundation has developed an input-output modeling system to achieve this end.



The following framework separates metrics into "inputs" and "outputs" based on implementation effects and ultimate Pillar outputs. Inputs can be used to measure the implementation of economic development policies, while outputs focus solely on the final effects contributed by each Pillar.

The Six Pillars Solution:

The Florida Scorecard is currently in a position to revolutionize the way in which we think about economic development. The formula for economic progress in Florida is a complicated structure, but it can be simplified by the model created by the Six Pillars framework. Within any system, whether it is an economy or a small business, there exist a set of inputs and outputs. At the firm level, businesses combine labor and capital to produce goods and services that the market highly values. We can view economic development in a similar manner. Florida's improvements in the Pre K-20 education system serve as inputs into the production of knowledgeable college graduates. Having a well-trained, knowledgeable workforce can lead to outputs such as higher wages.

The Florida Scorecard integrates both economic development inputs and outputs in the first five Pillars of the Six Pillars structure. Each Pillar has a well-defined set of inputs which measure the quantity and/or quality of implementing development policies. Users can view various inputs, track their performance, and develop conclusions about policy implementation. This feature allows policy makers and stakeholders to gauge the performance of their individual policy

Florida's economy will need to grow by at least 4.5% each year to become the world's 15th largest economic system by the end of the year 2030. Currently, if Florida was a country, the state would have the 19th largest economy in the world.

Source: USDA Economic Research Service, The World Bank, with Calculations by the Florida Chamber Foundation

objectives. For example, education leaders can use these metrics to assess the performance of students in various subject areas.

In addition, the first five Pillars have a well-defined set of outputs which measure the final effects contributed by each Pillar. For example, the college graduation rate and average wage can be defined as outputs of the Talent Supply and Education Pillar. Rather than measuring a particular policy, these outputs represent the performance outcomes resulting from a synergistic combination of all the economic development policies within a Pillar. These outputs are then used to calculate a performance index for each Pillar. The performance index does not reflect input values as its purpose is to measure policy outcomes rather than policy implementation. There may be various policies which make positive contributions to economic development; as a result the indices do not attempt to judge the merit of individual policy inputs. The performance indices represent the

progress of economic development outputs within each Pillar.

The last Pillar, Quality of Life and Quality Places, is the agglomeration of all factors which contribute to living standards for Florida residents, referred to as economic outcomes. In an attempt to solve the economic measurement puzzle, we provide a unique composite for quantifying Florida's economic progress. The Scorecard measure of economic progress goes beyond income growth outputs by addressing standard of living outcomes.

The first five Pillars contribute to improvements in average living standards. Improving the quality of life for Florida residents depends on performance gains in education, innovation, infrastructure, business climate, and sound governance. The values of the Six Pillars Strategic Plan drive the performance index for the Quality of Life and Quality Places Pillar. Thus, the corresponding performance index for this Pillar provides an answer to our puzzle: How is Florida doing?

THE FLORIDA SCORECARD



Measurement Aligned to the Six Pillars

Pillar indices are designed to provide real-time performance monitoring for each Pillar and are aligned with the Six Pillars 20-Year Strategic Plan. Rather than measuring intermediate inputs from policy actions, these indices focus solely on the performance outputs which are meaningful for Florida residents.

TALENT SUPPLY AND EDUCATION

INPUTS

High School Graduation Rate
Grade 08 Math Performance
Affordability of Higher Education
Student Science Performance
Certifications
State of Preschool
Grade 08 Reading Performance
K-12 Quality Ranking
College Transition Performance
Workforce System

OUTPUTS

College Attainment
Average Annual Wage
STEM Talent
Career/Technical

INFRASTRUCTURE AND GROWTH LEADERSHIP

INPUTS

Population
Building Permits
Energy Policy Rank
Land Conservation
Public Transit Use
Interstate Condition
Bridge Condition
Urban Congestion
Energy Prices
Energy Industry Productivity

OUTPUTS

Energy Efficiency (Consumption GDP)
Water Efficiency (per capita)
Transportation Efficiency (VMT per capita)
Greenhouse Gas Emissions (per capita)
Waste Generation (Units/GDP)

CIVIC AND GOVERNANCE SYSTEMS

INPUTS

Voter Turnout
Nonprofit Organizations
Charitable Contributions
Volunteerism
Pension Funding
Emergency Preparedness
Government Employment
Number of Ethics Complaints

OUTPUTS

Personal Freedom Index
Government Performance
Inflation
Crime Rate
Florida Civic Health Index

INNOVATION AND ECONOMIC DEVELOPMENT

INPUTS

Business Growth
Visitors
Business Starts/Closings
Entrepreneurial Activity
Venture Capital Spending/Seed Funding
Foreign Direct Investment
Research and Development
Patents Issued
High-Technology Industry Growth
Science and Engineering Workers
Number of Major Trading Partners
Innovation Establishments as a Percentage of Total Establishments
Phase II SBIR/STTR Grants

OUTPUTS

Productivity
Economic Return on Investment
Trade Activity

BUSINESS CLIMATE AND COMPETITIVENESS

INPUTS

Business Tax System Index
Employment Cost Index
Workers' Compensation Costs
Effective Business Tax Rate
Broadband Access
Interstate Condition
Health Insurance Cost
State Liability System Rank
Unionized Workforce
Cost of Doing Business Rank
CEO Ranking
Regulatory Burden

OUTPUTS

Economic Freedom Index
Retail Activity
Unemployment Rate
GDP Growth Rate

QUALITY OF LIFE AND QUALITY PLACES

OUTCOMES

▶ Real GDP per Capita	▶ Home Ownership
▶ Life Expectancy at Birth	▶ Home Foreclosures
▶ Health Status	▶ Home Affordability
▶ Leisure Time	▶ Rental Affordability
▶ Consumer Confidence	▶ Personal Bankruptcy
▶ Uninsured Residents	▶ Working Poor
▶ Employer Health Coverage	▶ Creative Industry
▶ Infant Health	▶ Adult Obesity
▶ Youth Obesity	▶ Property Insurance
▶ Adult Heart Disease	

TO LEARN MORE ABOUT THESE MEASURES, GO TO:
www.TheFloridaScorecard.com and click on 2030 Metrics

Implementation

“The Florida Chamber Foundation has served as a wonderful catalyst for business leaders around the state to share ideas about how to move our state forward. Together we can make Florida better and better.”

*—PAM RAUCH
Vice President, Florida Power and Light*

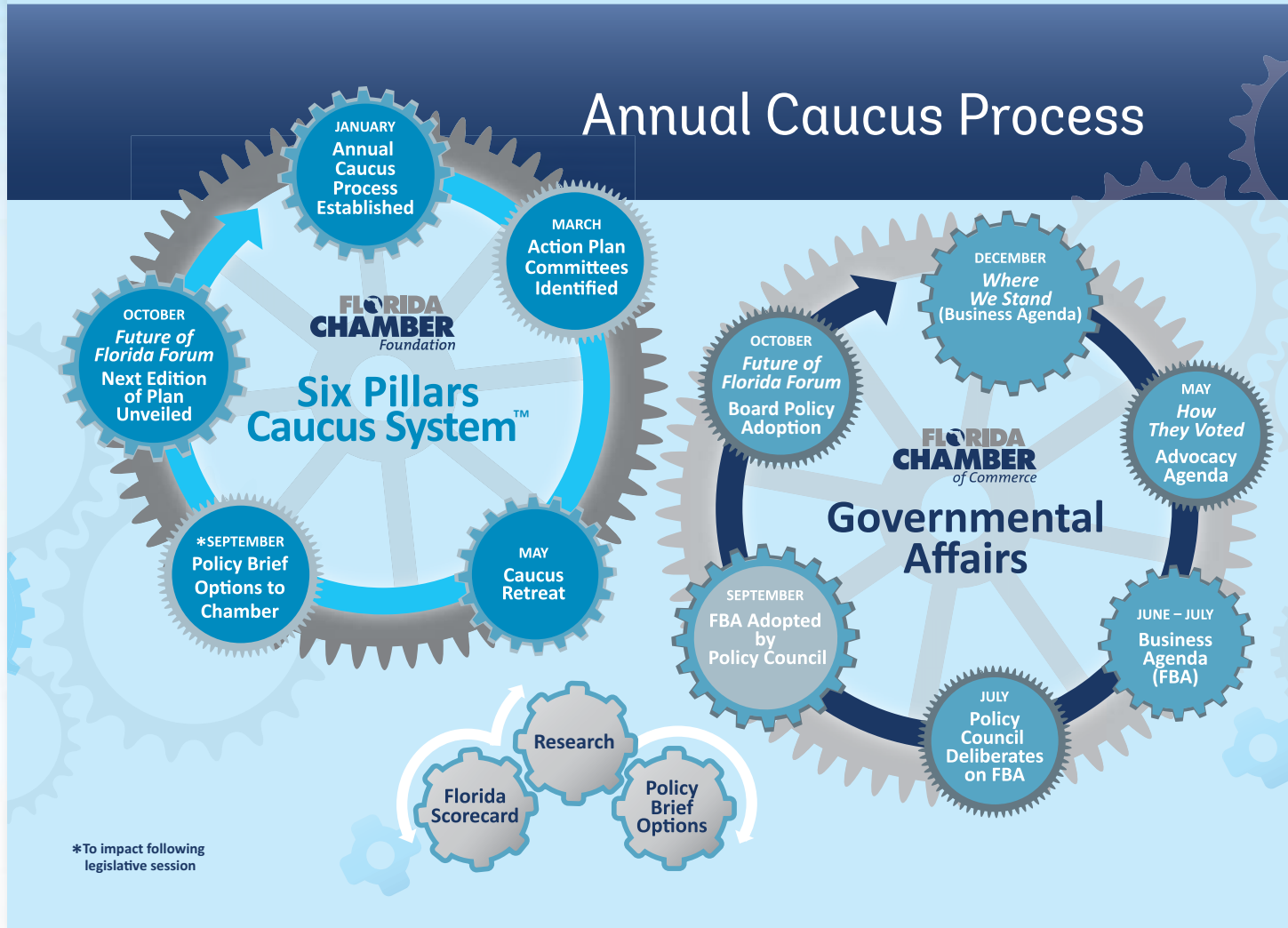
With dedication to further aligning the business community with civic and community leaders toward common goals, an annual review process begins each October with the Future of Florida Forum which convenes subject-matter experts and statewide and community leaders to evaluate the current economic environment, explore topics of interest to the state’s long-term success and share best practices gleaned from the past year’s implementations of regional/local Six Pillars strategic plans.

In spring, the annual Six Pillars Caucus Retreat brings volunteers back together to exchange policy options for consideration that form the iterative development of the Six Pillars 20-year Strategic Plan. Priority policy options are aligned with the assessment of the current economic and political environment. By mid-summer, Action Plan Committees have researched and made their best cases for policy options to be shared with the Florida Chamber’s Policy Council in anticipation of its summer-long deliberation process leading to the annual Florida Business Agenda.



In 2012, the Six Pillars Caucus System provided policy recommendations to the Florida Chamber’s Policy Council for the first time. Policy options were received from the Caucus aligned to each of the Six Pillars, with a total of 18 submissions comprised of approximately 100 contributing authors. Recommendations covered the spectrum of early learning, energy, entrepreneurial ecosystems, intermodal transportation, healthcare, civic engagement and much more.

Annual Caucus Process



The Florida Chamber's Policy Council considers a number of policy options for the upcoming legislative cycle, including the Caucus policy recommendations. Every year the Florida Chamber presents *Where We Stand*, an annual Business Agenda for jobs and a blueprint for the legislative priorities of Florida's business community. The Agenda for Jobs is shared during the Florida Chamber's Capitol Days in Tallahassee. To review previous and current editions of *Where We Stand*, go to www.FloridaChamber.com.

With the commitment and expertise of the Six Pillars Caucus System, a stronger bridge has been created between the long-term vision of Florida's future economy and short-term advocacy to help reach the goal of securing Florida's future.

Get Involved

● The Florida Scorecard

Joining the implementation of the Six Pillars framework is a commitment to measuring the current status and progress toward stated goals. The Florida Chamber Foundation tracks local and state measures via The Florida Scorecard, a dynamic online tool that seeks to identify and track those factors identified within each of the Six Pillars as indicative of our situation. Utilize the Florida Scorecard for measuring progress in your own area. The Florida Chamber Foundation offers tutorial support of the Florida Scorecard to assist you with your local needs.

THE FLORIDA SCORECARD

To learn more about Scorecard metrics, go to www.TheFloridaScorecard.com.



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● Six Pillars Caucus System

Florida has many challenges and opportunities and through the process of volunteer involvement, the Six Pillars offer new ideas and fresh perspectives. In spring, the annual Six Pillars Caucus Retreat brings volunteers together to exchange policy options for consideration that form the iterative development of the Six Pillars 20-year Strategic Plan. Priority policy options are aligned with the assessment of the current economic and political environment. By mid-summer, Action Plan Committees have researched and made their best cases for policy options to be shared with the Florida Chamber's Policy Council in anticipation of its summer-long deliberation process leading to the annual Florida Business Agenda.

There is much work to be done and the Florida Chamber Foundation would like your partnership and input as we continue the important work of the Six Pillars Caucus System.



To learn more about how you can get involved, go to www.FLFoundation.org/SixPillars.



● Six Pillars Communities

The Foundation's Six Pillars Communities program provides a common framework for developing and communicating local strategic planning for the benefit of participating in a common agenda, becoming a chorus for change: Out of Many, One Voice. The local plans provide input to the crafting of the statewide 20-year Strategic Plan via the Six Pillars Caucus System. Each county or region of Florida that has formally adopted the Six Pillars framework will have the opportunity to appoint local representatives per Pillar to the statewide Caucus System to ensure local strategic plans inform the statewide planning process.



To learn more about how your area can become a Six Pillars Community, go to www.FLFoundation.org/SixPillars.

THANK YOU TO OUR PARTNERS

The Florida Chamber Foundation would like to thank the following partners for their continued commitment and dedication. The Six Pillars would not be successful without their expertise and support:*

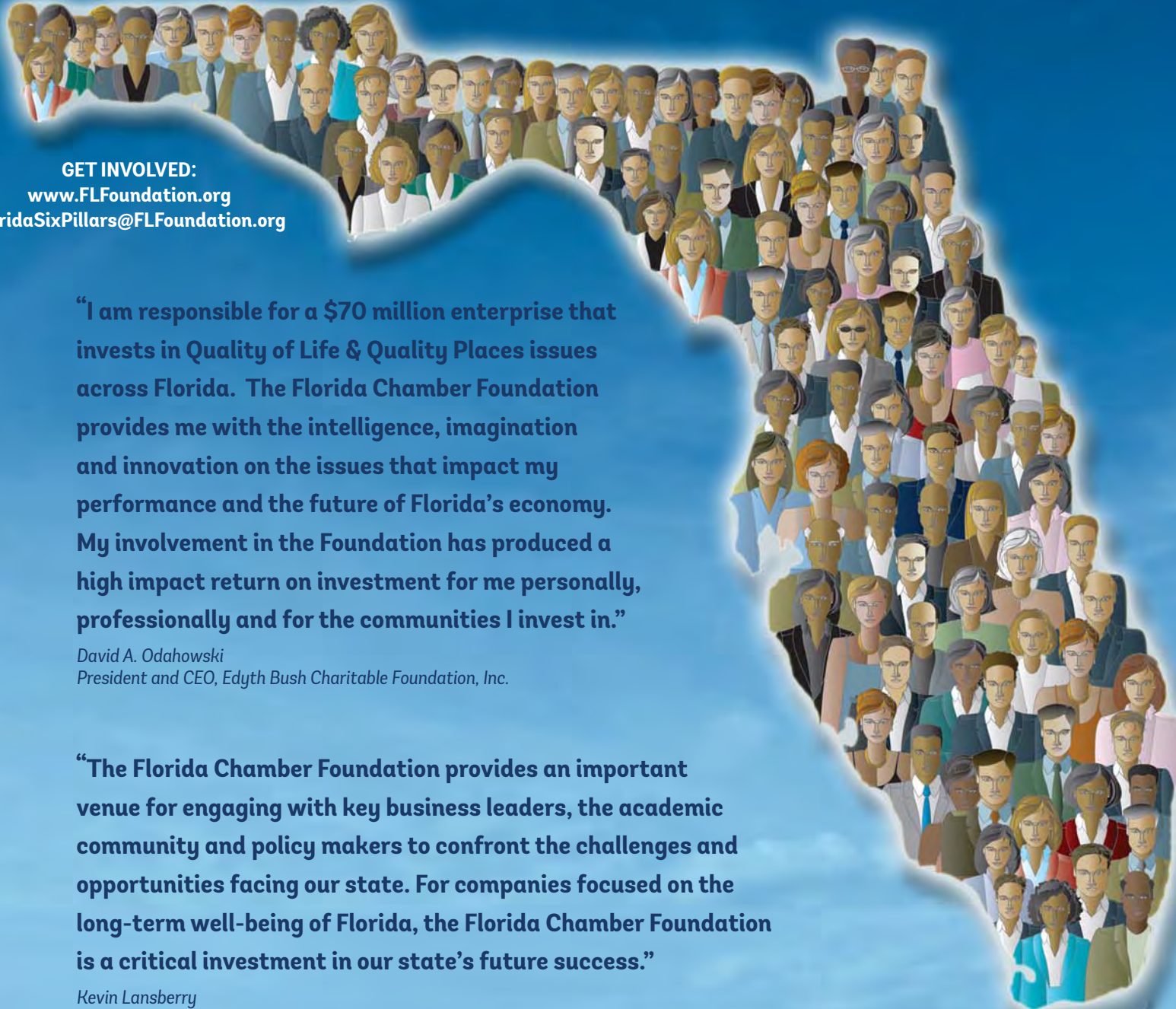
- 1000 Friends of Florida
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- Early Learning Coalition of Southwest Florida
- Economic Council of Palm Beach County, Inc.
- Economic Development Council of Florida's Space Coast
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- Enterprise Florida, Inc.
- Equality Florida
- Estates at Carpenters
- EV Services
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- Fifth Avenue Advisors
- First Coast Technical College
- Flagler County School District
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- Green Florida
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*As of August 2012

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- Greenberg Traurig
- Gulf Coast Community Foundation
- Gulf County Board of County Commissioners
- Gulf Power
- Gulliver Schools, Inc.
- Gunster, P.A.
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- Marjau Systems Corporation
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- Martin County Fire Rescue Department
- MedVision
- Mileo & Associates
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- Nair & Co., Inc
- National Entrepreneur Center
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- Nemours
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- Orange County Arts & Cultural Affairs
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- PBS&J
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- Pinellas County
- Plum Creek
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- Portofino Pools
- Poulos & Bennett, LLC
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- Progress Energy Florida, Inc.
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- Southern Strategy Group
- Southwest Florida Regional Planning
- Southwest Florida Workforce Development Board
- Space Florida
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- St. Johns County Chamber of Commerce
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- St. Johns County School Board
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To learn how you can get involved in helping to secure Florida's future, go to www.FLFoundation.org/SixPillars.



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www.FLFoundation.org

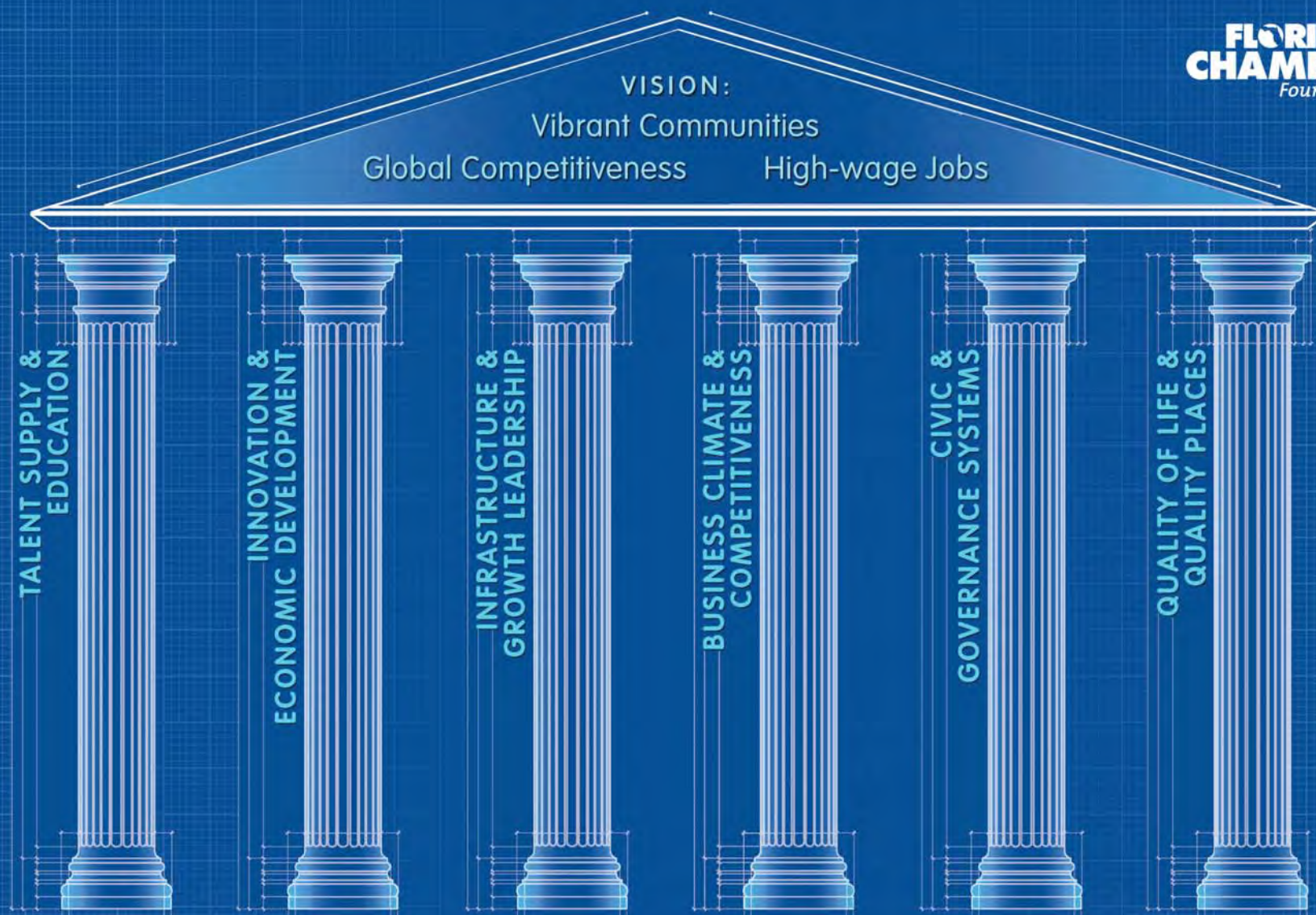
FloridaSixPillars@FLFoundation.org

“I am responsible for a \$70 million enterprise that invests in Quality of Life & Quality Places issues across Florida. The Florida Chamber Foundation provides me with the intelligence, imagination and innovation on the issues that impact my performance and the future of Florida’s economy. My involvement in the Foundation has produced a high impact return on investment for me personally, professionally and for the communities I invest in.”

*David A. Odahowski
President and CEO, Edyth Bush Charitable Foundation, Inc.*

“The Florida Chamber Foundation provides an important venue for engaging with key business leaders, the academic community and policy makers to confront the challenges and opportunities facing our state. For companies focused on the long-term well-being of Florida, the Florida Chamber Foundation is a critical investment in our state’s future success.”

*Kevin Lansberry
Senior Vice President, Walt Disney Parks & Resorts*



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