



Chapter 4 Executive Summary: Marketing & Strategic Plan



avalanche

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About the Strategy

In March 2018, JAXUSA Partnership, Northeast Florida Regional Council, CareerSource Northeast Florida, and other partners initiated a Regional Economic Development Strategy to improve regional competitiveness and collaboration throughout Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties. Avalanche Consulting, a national economic development consultancy, and the Council for Adult and Experiential Learning (CAEL), a national nonprofit focused on lifelong learning, were selected to facilitate the preparation of the economic development and workforce development strategy.

Once complete, Elevate Northeast Florida will have four chapters:

Chapter 1: Economic Assessment & Community Benchmarking

The first chapter of the Elevate Northeast Florida Strategy includes in-depth analysis of the region's current economic and demographic conditions in comparison to national and statewide trends, as well as selected benchmark regions. The first chapter also includes a SWOT Analysis (strengths, weaknesses, opportunities, and threats) based on both quantitative and qualitative information gathered through focus groups, interviews, and an online survey.

Chapter 2: Target Industry Validation & Update

Chapter 2 examines the current status of the region's existing target industries and niche sectors that can be integrated into an updated target list for future economic development efforts. The Target Industry Validation & Update includes written profiles for each target industry, marketing messages, and an industry trend analysis.

Chapter 3: Workforce Development Assessment

The Workforce Development Assessment analyzes the skillsets of the region's workforce and highlights workforce attributes that distinguish the region from the competition or need improvement. Chapter 3 includes an examination of existing educational pathways, current and potential gaps in workforce supply, and recommendations for creating an even more robust regional workforce.

Chapter 4: Marketing & Strategic Plan

The final chapter of Elevate Northeast Florida provides marketing and community investment recommendations to help the region be more competitive globally. The Marketing & Strategic Plan includes recommendations on structuring implementation and measuring progress, equipping regional leaders with the tools needed to successfully move the Strategy forward over the next five years.



Project Partners

The Elevate Northeast Florida Strategy is being developed by JAXUSA Partnership, CareerSource Northeast Florida, and the Northeast Florida Regional Council in partnership with Avalanche Consulting, CAEL, and local residents, public organizations, and private businesses.

JAXUSA Partnership

JAXUSA Partnership is a private, nonprofit division of the JAX Chamber and is the seven-county region's economic development initiative. Its mission is to be a catalyst for economic growth and maximize the region's unique resources to aggressively recruit jobs and private capital investment to the region. JAXUSA coordinates economic development efforts across a seven-county region that includes Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns Counties.

Northeast Florida Regional Council (NEFRC)

The Northeast Florida Regional Council (NEFRC) is the regional planning organization for seven counties (Baker, Clay, Duval, Flagler, Putnam, Nassau and St. Johns) and their 27 municipalities. The mission of the NEFRC is to celebrate the unique assets of the region and to engage its people, businesses, governments, and organizations. In 2009, NEFRC adopted a Comprehensive Economic Development Strategy (CEDS). Updated in 2012 and 2015, the CEDS buttresses other economic development efforts in the region through identifying programs and projects essential to the region's economic development objectives.

CareerSource Northeast Florida

CareerSource Northeast Florida is a publicly funded agency that provides extensive workforce-related services to six counties on Florida's First Coast – Baker, Clay, Duval, Nassau, Putnam, and St. Johns counties. CareerSource opens the door to improved employment opportunities through education, training, and career services for workers. CareerSource administers an annual budget of more than \$20 million.

Northeast Florida Residents & Businesses

Development of the Elevate Northeast Florida Strategy involved face-to-face discussions with private business leaders, representatives of philanthropic organizations, economic development professionals, and other civic champions. Additionally, more than 1,300 residents and business owners completed an online survey as part of the economic development strategic planning process.

(continued)



Project Partners (continued)

Avalanche Consulting, Inc.

Avalanche Consulting is the nation's premier economic development strategist. Avalanche is deeply driven to make a positive impact and seek clients who are equally inspired to energize their economies. Headquartered in Austin, Avalanche was established in 2005 and its team has a combined 80+ years of experience working with more than 150 cities, counties, and regions across the country.

Council for Adult and Experiential Learning (CAEL)

CAEL is a national, non-profit organization whose mission is to put meaningful learning, credentials, and work within reach for every community. CAEL works to remove policy and organizational barriers to learning opportunities, identifies and disseminates effective practices, and delivers value-added services. Since its founding in 1974, CAEL has been providing colleges and universities, companies, economic development organizations, labor organizations and state and local governments with the tools and strategies they need to create practical, effective lifelong learning solutions to address long-term skills needs.



Steering Committee Members

The Elevate project partners and consulting team sincerely thank the members of Elevate Northeast Florida's Strategy Committee for helping inform and guide the development of this strategic plan. Members include:

Tony Allegretti, *Cultural Council of Greater Jacksonville*
 Katrina Austin, *Flagler County DEO*
 Dr. Perry Bechtel, *Mayo Clinic*
 Brian Bergen, *Putnam County EDC*
 The Honorable Aaron Bowman, *City of Jacksonville*
 Michelle Braun, *United Way of Northeast Florida*
 Debbie Buckland, *BB&T*
 Carolyn Clark, *Urban Land Institute*
 Josh Cockrell, *Infinity Global Solutions*
 Rena Coughlin, *Nonprofit Center*
 Steve Crosby, *InvestJAX*
 Jay Cunio, *JAA*
 Dr. Mark Dawkins, *University of North Florida*
 Laura DiBella, *Nassau County EDB*
 Lara Dietrich, *Dietrich Planning*
 Janice Donaldson, *Small Business Development Center*
 Kevin Doyle, *Wexford Strategies*
 Heather Duncan, *AT&T*
 Karen Everett, *St. Johns County Chamber of Commerce*
 Bruce Ferguson, *CareerSource Northeast Florida*
 Mike Fleming, *Jacksonville University*

Elizabeth Feustel, *Jacksonville Civic Council*
 Bill Garrison, *NEFBA*
 Melissa Glasgow, *St. Johns County*
 Jake Gordon, *Downtown Vision*
 Shelley Hirsch, *Nassau County EDB*
 Elaine Johnson, *Guidewell*
 Will Ketchum, *Burdette Ketchum*
 Robin King, *CareerSource Flagler Volusia*
 Jana Kooi, *Florida State College at Jacksonville*
 Dr. Anna Lebesch, *Steering Committee Co-Chair, St. Johns River State College*
 Eric Mann, *First Coast YMCA*
 Phyllis Martin, *United Way of Northeast Florida*
 Trina Medarev, *World Affairs Council*
 Jeanne Miller, *Jacksonville Civic Council*
 Sherri Mitchell, *Nassau County EDB*
 Katie Mitura, *Visit Jacksonville*
 Candace Moody, *CareerSource Northeast Florida*
 Alan Mosley, *Regional Transportation Commission*
 The Honorable Don O'Brien, *Flagler County*
 Mary O'Brien, *Meridian Waste*

Jeff Parsons, *AT&T*
 Laura Pavlus, *Clay County EDC*
 Robert Peek, *JAXPORT*
 Jordan Pope, *JEA*
 Crawford Powell, *Baker County Chamber of Commerce*
 Ed Randolph, *City of Jacksonville OED*
 Lake Ray, *FCMA*
 Darryl Register, *Baker County Chamber of Commerce*
 Bob Rhodes, *Attorney-At-Law*
 Jeff Sheffield, *North Florida TPO*
 Darnell Smith, *Steering Committee Co-Chair Florida Blue*
 Kelly Smith, *Wells Fargo*
 Jim Stallings, *PS27 Ventures*
 Chereese Stewart, *Clay County*
 Crystal Stiles, *FPL*
 Brian Teeple, *Northeast Florida Regional Council*
 Brad Thoburn, *JTA*
 Helga van Eckert, *Flagler County DEO*
 Nina Waters, *Community Foundation for Northeast Florida*
 Kirk Wendland, *City of Jacksonville OED*

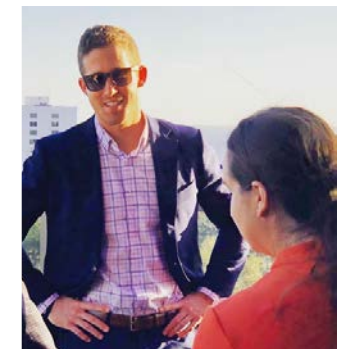


Stakeholder Input

Over the course of eight months, the Elevate planning process involved more than 1,500 regional stakeholders who contributed more than 1,300 hours of their time to shaping the strategy through workshops, surveys, and interviews. The stakeholder input process encompassed all seven counties in the region and included:

- 4 Steering Committee Workshops (~60 participants)
- 3 Workforce Partners Workshops (~30 participants)
- 1 Regional Forum Workshop (~100 participants)
- 13 Individual Interviews
- 1,341 Community Survey Responses
- 7 Half-Day County Workshops with Leaders and Stakeholders
- 20 Focus Groups (~150 Attendees) on the following topics:

- Young Professionals	- Public Policy
- Transportation	- Land Use
- Poverty	- Civic Council (x2)
- Earn Up	- Employers
- JAXUSA BD Committee	- CareerSource
- Advanced Manufacturing	- Urban Land Institute
- Health & Life Sciences	- Information Technology
- Financial Services	- Logistics
- Marketing and Branding	- Aviation
- Entrepreneurship	- Business Development



Strategic Framework

The recommendations in Elevate Northeast Florida's fourth chamber, Marketing and Strategic Plan, were inspired by sentiments expressed by stakeholders across the region from day one of the planning process. The messages that echoed throughout the region were:

- To reach our vision, our leaders must **work together as a region**, crossing political jurisdictions. We believe in the power of **partnerships and strong leadership**.
- Our goals must be **unabashedly bold**. We want to be challenged and have the assets and ingenuity to achieve big goals.
- We commit to intensifying activities to make our region's economy the most resilient and highest performing in the nation. Our last five-year strategy focused on becoming a more innovative region – **we want the next five years to focus on accelerating and elevating economic development**.

Elevate Northeast Florida's strategic framework, illustrated to the right, reflects these sentiments. First, the region's vision is to have the highest performing economy in the country. This future is attainable. In 2017, the Jacksonville metro had the third highest rate of job growth of all large metros in the US. Intentional investments to support industry growth and advance the region's workforce could improve the region's ranking even more in the future.

Being resilient is critical to achieving the region's vision. While the past five years have seen remarkable economic growth, remaining steady when the economy slows is a matter of resiliency. **Resiliency can be achieved through a focus on the four goals of this strategy: advancing the region's workforce, deepening and diversifying industry, strengthening the region's brand, and becoming a leading smart region that embraces innovation in all that it does.**



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Strategic Framework, continued

Each Elevate Northeast Florida goal is supported by a series of strategies and priority projects for the next five years. While priority projects can evolve over time as original projects are completed and new opportunities surface, the goals and strategies themselves should remain the same over the course of implementation. This strategic framework allows for adaptability and encourages collective impact in which multiple partners across various perspectives participate in a project, work toward a shared objective, and then disband and re-group on other projects that form in support of the Strategy's goals.

EMPOWER PARTNERSHIPS TO ADVANCE EDUCATION AND WORKFORCE.

- Increase consistent and coordinated employer engagement.
- Improve awareness of and participation in career pathways in the region.
- Strengthen efforts to engage youth and adults in completing their post-secondary credentials of economic value.

AMPLIFY OUR LEADERSHIP AS A PREEMINENT SMART REGION.

- Coordinate investment and partnerships to develop and grow the Bay Street Innovation Corridor.
- Activate and accelerate smart region investments.
- Improve the connectivity and efficiency of regional mobility / transit options.

EMBOLDEN OUR GLOBAL BRAND.

- Establish a strong, unified regional brand based on best practices.
- Invest in modern marketing and communications that increase positive awareness among businesses and talent.

DEEPEN OUR INDUSTRY CLUSTERS AND INTENSIFY SUPPORT.

- Invest in assets that encourage the growth of the region's target industries.
- Create a more vibrant regional entrepreneurial and innovation ecosystem.
- Strengthen the region's international connectivity.



Strategic Framework, continued

PRIORITY PROJECTS

Priority projects, as listed below, are designed to be implemented within a set timeframe, for example, 12-18 months. They are designed to be discrete in nature and can be followed by additional “next step” projects that build on – intensifying and amplifying – their results. The Implementation section (04) of this report provides additional recommendations on the proposed timing of each project.

ADVANCE EDUCATION AND WORKFORCE

- Strengthen the region's newly-formed Talent Advancement Network.
- Increase employer involvement in K-12 CTE and Career Academy programs.
- Create a communications campaign plan to raise awareness of target industry jobs that are in high demand and participation in career pathways into those jobs.
- Deploy a career pathways awareness communications campaign within the seven-county region.
- Re-energize Earn Up to build awareness of and sponsor credential completion initiatives.

SMART REGION

- Review and adjust existing downtown development plans, zoning, and incentives to advance Bay Street as a signature project of the smart region initiative.
- Together with the North Florida Smart Region Coalition, establish an agenda and prioritize projects for the Smart Region Master Plan.
- Involve entrepreneurs and global thought leaders in shaping our community as a preeminent smart region.
- Improve the region's mobile app for sharing transportation information with residents.
- Galvanize a Regional Integrated Open Data Exchange (Innovation Alliance of Florida).
- Assist local jurisdictions with modernizing their collection of data.

GLOBAL BRAND

- Activate the Water Life brand theme / DNA.
- Update all JAXUSA Partnership marketing tools and business development approach to reflect the Elevate target industries and strategy.
- Increase resources and grow the team of people dedicated to promoting the region.
- Strategically identify and develop local leaders as brand ambassadors for the region.
- Invest in a targeted three-year (minimum) talent attraction campaign.

INDUSTRY SUPPORT

- Form regional councils of executives in the (1) Health & Biomedical and (2) Financial Services industries to encourage stronger partnerships.
- Strengthen marketing of JAXPort's unique position as a hub for LNG-fueled logistics and exports.
- Update a study to quantify the true size and impact of the region's IT workforce.
- Map the region's innovation-driven entrepreneurship assets and networks. Develop an action plan to strengthen areas of weakness discovered during the mapping process.
- Develop a plan to create a smart region innovation center and tailored support for startups in the field of smart infrastructure.
- Add a smart infrastructure cohort into JAX Bridges and other entrepreneurship education programs across the region.
- Continue building relationships with foreign embassies and consulate offices in Washington DC and elsewhere.
- Continue implementing the Brookings Global Cities Initiative's program of work.



Key Infrastructure Recommendations to Support Industry Growth

Ongoing, longer-term infrastructure investment in the region must continue to support all Elevate Northeast Florida goals. This is especially important given the region's population and economic growth trends. Prepare for continued growth and enhance existing infrastructure to further improve the region's competitiveness for its target industries and talent. **There are a number of critical infrastructure investments that should be taking place during the next five years of Elevate implementation.** This is not designed to be a comprehensive list, but top projects include:

REGIONAL INFRASTRUCTURE PROJECTS

- Increase coordinated efforts to **improve transit options, connect transit services**, and provide residents with efficient transit services connecting them from one county to another county.
- Support policies and initiatives that will help the region implement **smart infrastructure** such as autonomous and connected vehicles, and dedicated smart technology corridors connecting communities across the region.
- Increase infrastructure investments that improve access to the region's **waterways** for recreation and commerce. Also, complete beach restoration in counties impacted by Hurricanes Matthew and Irma.
- Complete the **First Coast Expressway** from I-10 to I-95 and proceed with construction of the new Shands Bridge.
- Extend **broadband service** to all homes and businesses in the region.
- Continue to rally resources and complete **JAXPORT's harbor deepening** and preparations to accommodate Neopanamax vessels.
- Continue adding **new non-stop flights** from the region, particularly to West Coast and international destinations.
- Ramp up efforts to address **the region's growing demand for housing, particularly workforce housing**. Develop a set of public policy standards for the region, based on national best practices, to guide city and county governments in updating policies to encourage a variety of quality housing within their communities and allow for mixed-use density and job centers along major transportation corridors and future transit hubs.



Key Infrastructure Recommendations to Support Industry Growth, continued

COUNTY AND SITE-SPECIFIC INFRASTRUCTURE PROJECTS

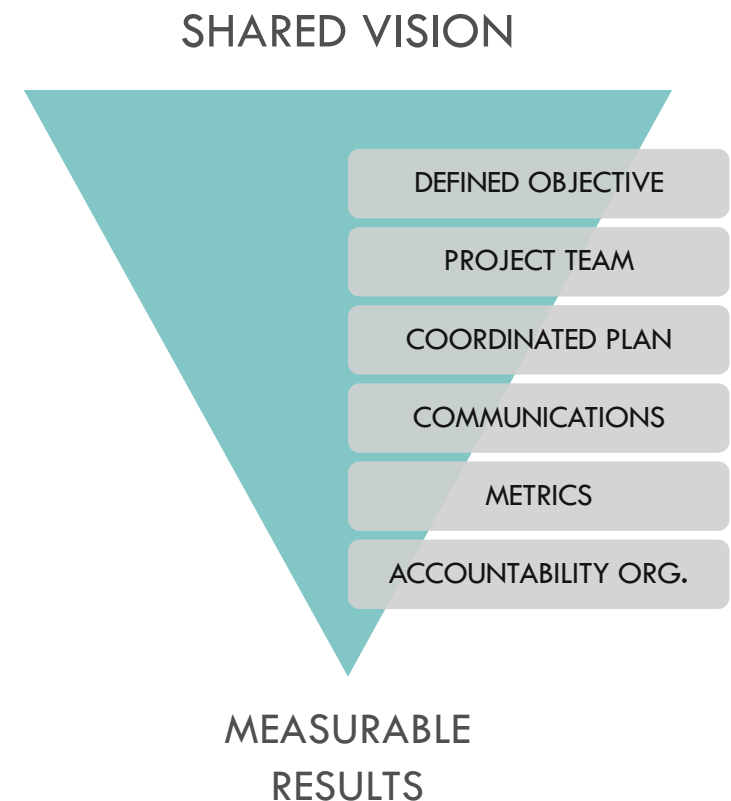
- Improve, expand, and plan for new water and wastewater capacity in **Baker County** in anticipation of future growth. Continue investing in buildings and infrastructure on sites around the county, including the Enterprise East Industrial Park and Woodstock Industrial Park. Start construction of the 2.8-mile Midpoint Parkway planned to connect I-10 and the Walmart site.
- Invest in infrastructure to open up business sites in **Clay County**. For example, build a road at the 740-acre Challenger Center and continue to plan for the long-term development of Reynolds Park. Work with local landowners to acquire new properties for development in partnership with utility providers and developers.
- Continue pursuing the **skyway conversion and regional transportation center** in Downtown Jacksonville.
- Continue investing in infrastructure and site readiness at **Cecil Commerce Center**.
- Continue construction and site readiness improvements at **Flagler County** Airport, as well as preparing other shovel-ready sites in the county (particularly large, rail-served properties).
- Work with Florida Power & Light (FPL) to prepare and promote the 1,814-acre Crawford Diamond megasite in **Nassau County**. Complete current transportation construction projects in Nassau County, and work with developers to increase the supply of office and industrial buildings. Begin planning now to increase the county's wastewater capacity.
- Update zoning to allow for the development of a new industrial park(s) in **Putnam County**, and work with providers to extend internet service across Putnam County.
- Expand investment in sites and buildings in **St. Johns County** (and infrastructure to those sites) to increase the tax base coming from primary industries.



Implementation: Collective Impact Framework

Elevate Northeast Florida is designed to be implemented through a collective impact approach. First described by John Kania and Mark Kramer in the *Stanford Social Innovation Review*, Collective Impact is a framework for addressing complex social and economic issues. The framework provides a comprehensive structure to focus diverse organizations on a shared vision and strategic goals. It is not intended to be rigidly set in stone but instead remain flexible to changing conditions and new opportunities while still holding partners accountable. Collective Impact has five key elements described below.

1. **Common Agenda** – The participants have a shared vision, clearly defined objectives, and a joint approach to achieving them through agreed upon actions. *This Elevate Northeast Florida Strategy is the common agenda.*
2. **Common Progress Measures** – All participants share common and consistently measured metrics of success to ensure alignment and accountability. *Metrics are provided in this Strategy.*
3. **Mutually Reinforcing Activities** – Participants agree to a coordinated plan of action with complementary and supportive roles for all. *This Strategy recommends that teams of volunteers form to implement each priority project, and that those teams agree to a plan of action that includes a start date, milestones, and an end date.*
4. **Communications** – Participants engage in transparent and continuous communication with themselves and the public to build trust and maintain focus. *In addition to in-person and online communication between project team members, the ElevateNEFL.com website has the potential to become an information portal for sharing progress reports and other Elevate news.*
5. **Backbone Organization** – A lead organization with staff and skills is required to support the entire framework, track progress, coordinate organizations and activities, and report regularly to the community. *For Elevate Northeast Florida, JAXUSA should serve as the convener and backbone organization.*



Implementation: Measuring Progress

Lists of recommended metrics to monitor progress and implementation of this Strategy are provided within each goal of the Marketing and Strategic Plan:

EMPOWER PARTNERSHIPS TO ADVANCE EDUCATION AND WORKFORCE.

Complete Priority Projects:

- > Defined TAN organizational structure, committee goals, and year one action plans
- > Active career awareness marketing campaign
- > Documented target industry career pathways and active communications campaign
- > Expansion of Earn Up's post-secondary credential completion activities across the region

Outcomes:

- > Educational attainment (2- and 4-year degree levels as a % of population)
- > K-12 success, including improved reading and math proficiencies, and graduation rates
- > Reduced suspension and expulsion rates
- > Awareness of career pathways in the region among residents (update data from 2018 Elevate community survey)
- > Percentage of workers in high-demand target industry occupations
- > Number of students entering and completing CTE, college-ready, and career-ready programs

AMPLIFY OUR LEADERSHIP AS A PREEMINENT SMART REGION.

Complete Priority Projects:

- > Updated City of JAX policies to enable Bay Street smart corridor
- > Launched Smart Region Task Force
- > Participation in Smart Region-related events
- > Updated TransPortal app
- > Fully functioning Regional Integrated Open Data Exchange

Outcomes:

- > Number of blocks/miles of roadway with smart infrastructure
- > Passenger traffic in mass transit / autonomous vehicles
- > Number of / growth of / venture capital investment in the region's smart infrastructure companies
- > TransPortal traffic
- > Reduction in average commute times



Implementation: Measuring Progress, continued

Lists of recommended metrics to monitor progress and implementation of this Strategy are provided within each goal of this Strategy. To summarize:

EMBOLDEN OUR GLOBAL BRAND.

Complete Priority Projects:

- > Water Life theme incorporated into JAXUSA and other partners' marketing
- > Updated JAXUSA marketing tools
- > Increase in marketing budget and staff resources
- > Launched targeted talent attraction campaign

Outcomes:

- > Website traffic (number of visitors, length of stay, click-through rates)
- > Digital advertising views and opens
- > Media mentions
- > Prospect inquiries and visits
- > Project wins
- > Talent in-migration rates

DEEPEN OUR INDUSTRY CLUSTERS AND INCREASE SUPPORT FOR THEIR GROWTH.

Complete Priority Projects:

- > Map of entrepreneurial assets and entrepreneurship action plan
- > Smart infrastructure incubator plan and cohort in entrepreneurship program
- > Updated analysis of the region's IT workforce
- > Action plan to implement Brookings Global Cities Initiative

Outcomes:

- > Job growth and capital investment by target industry companies
- > Self-employment, average annual receipts by self-employed persons
- > Number of micro businesses
- > Number of patents
- > Venture capital
- > Seaport and airport volumes
- > Exports
- > Foreign Direct Investment

