The Florida Senate

COMMITTEE MEETING EXPANDED AGENDA

COMMERCE AND TOURISM
Senator Detert, Chair
Senator Abruzzo, Vice Chair

MEETING DATE: Tuesday, December 4, 2012
TIME: 9:00 —11:00 a.m.
PLACE: *James E. "Jim" King, Jr. Committee Room,* 401 Senate Office Building

MEMBERS: Senator Detert, Chair; Senator Abruzzo, Vice Chair; Senators Bean, Hays, Hukill, Margolis, Richter, Ring, Simpson, Stargel, and Thompson

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	Introduction of committee members and staff by the Committee Chair		
2	Overview of the committee's jurisdiction by the committee staff		
3	Other Related Meeting Documents		

Senate Commerce & Tourism Committee Jurisdiction

Revised 11/27/2012

The jurisdiction of the Senate Commerce & Tourism Committee includes five general subject areas:

- Workforce Development / Reemployment Assistance;
- Economic Development;
- Business Organizations;
- Commercial Activity; and
- Consumer Protection.

In addition, the committee may be second reference for selected issues relating to banking and insurance; education; military affairs and space; regulated industries; taxation; telecommunications; tort reform; and transportation.

Workforce Development includes programs overseen by Workforce Florida, Inc. (WFI), the Department of Economic Opportunity (DEO), and the 24 Regional Workforce Boards (RWBs). These agencies work together to provide services to both individuals and businesses, such as assistance finding a job and workforce training and education. Additionally, DEO administers the **Reemployment Assistance Program** (formerly the unemployment compensation program). The committee may also consider matters related to the state minimum wage, employee leasing, conditions of employment, migrant and contract labor, and "preference" for Florida workers and contractors in public contracts.

Economic Development is a broad category of issues that the committee routinely considers, and that overlaps with workforce development. The Department of Economic Opportunity (DEO) and Enterprise Florida, Inc. (EFI), work together on business recruitment and job creation, and to administer programs related to incentives for businesses relocating or expanding in Florida. The state also has programs that focus on trade, biotech research, technology, space, seaports, film and entertainment, sports, minority businesses, enterprise zones, small businesses, and access to capital. Economic development also encompasses activities related to tourism. Other entities with related programs include Visit Florida, Space Florida, the Florida Sports Foundation, the Office of Film and Entertainment in DEO, Black Business Investment Corporations, the Institute for the Commercialization of Public Research, and the Florida Opportunity Fund.

A **Business Organization**, or business legal structure, governs the formation, operation, merger, conversion, and dissolution of businesses. For example, options include corporations, limited liability companies, not-for-profit corporations, and limited partnerships. Generally in Florida such organizations are required to annually file documents with the Division of Corporations in the Department of State (DOS). In addition to required filings, other **Commercial Activity** under the jurisdiction of the committee includes meeting the requirements of the Uniform Commercial Code and the protection of proprietary information, like trade secrets. DOS also commissions notary publics.

Consumer Protection issues cover a broad range of topics, including advertising, sales of goods, sale of services, event tickets, service contracts, secondary metal recyclers, civil rights, and the Florida Deceptive and Unfair Trade Practices Act (FDUTPA). The committee may also be referenced legislation related to liability (relating to employees or public safety), lending and credit (relating to consumer finance), and trespassing (relating to unauthorized commercial activity).

The Department of Agriculture and Consumer Services (DACS) administers non-agricultural programs over which the committee has jurisdiction. The Division of Consumer Services acts as the state's clearinghouse for consumer complaints and information. This division regulates the "Do-Not-Call" registry, pawnbrokers, sellers of travel, game promotions, movers, telemarketers, motor vehicle repair shops, business opportunities, charitable organizations, dance studios, and health studios. In 2012, the former Division of Standards was merged into the Division of Consumer Services. Currently, the Division of Consumer Services administers liquid petroleum gas and petroleum inspections, amusement ride inspections, weights and measures, and the Motor Fuel Marketing Practices Act.

Also under DACS, the Division of Licensing regulates the private security, private investigation, and recovery (repossession) industries (businesses and agents); and the concealed weapons license program.

Department of Agriculture and Consumer Services

Division of Consumer Services

The Division of Consumer Services is the state's clearinghouse for consumer complaints and information. The division has responsibility for regulating 16 business industries operating in Florida and maintains a call center with a toll free consumer hotline 1-800-HELPFLA (1-800-435-7352). The call center is staffed with trained analysts who answer approximately 25,000 telephone calls and approximately 400 online chat inquiries each month. In addition, the call center provides nearly 40,000 assists to consumers each month in the form of email responses, public records requests, and electronic and printed consumer information.

Consumer education is a main focus of the division. Along with the information provided through the call center, thousands of educational brochures are distributed each year to individuals, civic groups, community organizations, and schools. The division offers speakers to participate in community meetings, conferences, and meetings statewide. In addition, the division maintains a website at www.800helpfla.com which helps educate Florida consumers and businesses and provides online complaint filing as well as the ability to register a business online.

The division consists of five bureaus:

Bureau of Compliance

The Bureau of Compliance has regulatory responsibility for registering and licensing the following types of business entities:

Sellers of Business Opportunities: Sellers of business opportunities are required to file a disclosure statement and some are also required to post a bond of $50,000.

Dance Studios: Ballroom dance studios that require an advance payment in excess of $250 or which enter into installment contracts are required to register annually and post a bond with the department.

Sweepstakes/Game Promoters: Promoters are required to register with the department at least seven days prior to the commencement of their game promotion.

Health Studios: Health studios are required to register with the department annually and in some cases post a $50,000 security. The purpose of this security is to reimburse members if the studio fails to meet its contractual obligations to its members.

Household Moving Services: Moving companies of household goods within the state of Florida are required to annually register with the department and maintain insurance.

Florida Motor Vehicle Repair Shops: Each motor vehicle repair shop is required to register with the department prior to doing business in the state.

"Do Not Call": Residents can list their telephone numbers with the division to help relieve them of unwanted and unsolicited telephone solicitation calls.

Pawnbroking: Pawnshops are required to annually register with the department and obtain a license. Each pawnshop must maintain a net worth of at least $50,000 or file security in the amount of $10,000.

Sellers of Travel: Any seller or promoter of travel-related services is required to register annually with the department, unless exempt. Sellers of travel are required to submit a security in an amount not to exceed $25,000 or $50,000 if they sell vacation certificates.

Solicitation of Contributions: Charitable organizations, sponsors, professional solicitors, and fundraising consultants are required to register with the department before soliciting contributions.

Telemarketing: Non-exempt businesses that engage in the sale of consumer goods or services by telephone are required to be licensed and post security of $50,000 prior to soliciting in the state. Salespersons for these businesses are also required to be licensed.

Weights and Measures: All weighing and measuring devices used in commerce within the state require calibrating and permitting.

Bureau of Mediation and Enforcement

The Bureau of Mediation and Enforcement is responsible for mediating complaints filed by consumers regarding goods and services provided by businesses, as well as initiating enforcement actions for violations of the regulatory laws. The bureau processes all consumer complaints filed with the division both electronically and via mail. The bureau receives more than 42,000 complaints each year, with 15 percent to 20 percent of those complaints filed against businesses violating the Florida "Do Not Call" law. This bureau also processes administrative enforcement actions for violations by an entity that falls within one of the division's regulatory programs.

Bureau of Standards

The Bureau of Standards conducts inspections of the petroleum distribution system and analyzes samples of petroleum products to ensure consumers are being offered quality products at a fair measure. Additionally, the bureau is responsible for conducting inspections at 9,025 retail facilities and inspects more than 60,000 commercial measuring devices each year. It also inspects non-food packages sold in retail establishments, ensuring that labels contain accurate and meaningful quantity statements. The bureau laboratory houses the state's primary measurement standards of mass, length, and volume, directly traceable to National Bureau of Standards in Washington, D.C.

Bureau of Liquefied Petroleum Gas Inspection

The Bureau of LP Gas Inspection is charged with the safety regulation of liquefied petroleum gas in Florida wherever this product is stored, distributed, transported, and utilized. Its mission is to ensure the safe sale, use, storage, handling, and transportation of propane gas in Florida. The bureau's public responsibility for LP gas safety begins when the product enters the state's border and continues until the product is safely consumed by the public.

Bureau of Fair Rides Inspection

The Bureau of Fair Rides Inspection inspects and permits all amusement rides in Florida, except those at certain exempt facilities. The bureau investigates all accidents, incidents, and consumer complaints involving amusement rides. Inspection specialists inspect mechanical, structural, electrical, and operational characteristics of each amusement ride and determine whether the ride meets the requirements of Florida law before it is allowed to operate in Florida.

Board of Professional Surveyors and Mappers

The Board of Professional Surveyors and Mappers consists of nine members: seven professional surveyors and mappers, one of whom must be a photogrammetrist, as well as two consumer members. The board has been charged by the Florida Legislature with protecting the public interest and encouraging the entry of qualified individuals into the profession. Individuals who apply for licensure must meet certain education, experience, and testing criteria prior to licensure. The board also provides protection by disciplining those licensees who violate the professional practice act.

Florida Laws

Chapter 472, F.S.
Chapter 496, F.S.
Chapter 501, F.S.
Chapter 507, F.S.
Chapter 525, F.S.
Chapter 526, F.S.
Chapter 527, F.S.
Chapter 531, F.S.
Chapter 539, F.S.
Chapter 559, F.S.
Chapter 570, F.S.
Section 610.108, F.S.
Section 616.242, F.S.
Section 849.094, F.S.

Department of Agriculture and Consumer Services
Division of Licensing

The Division of Licensing administers two distinct licensing programs. While these two programs are oriented in different directions -- one involves the regulation of a group of specialized professionals and businesses, the other licenses qualified individuals to carry concealed weapons -- they do share one common goal: to enhance the safety and welfare of Florida citizens by providing reasonable assurances that applicants are law-abiding individuals who are trained, qualified, and knowledgeable and do not pose a threat to society.

Private Security, Private Investigation, and Recovery

The division licenses and regulates more than 180,000 individuals and agencies in the private security, private investigation, and recovery (repossession) industries. The division's regulatory powers are broad and comprehensive, encompassing all aspects of the operation of the regulated industries. The division's oversight begins with the establishment of education and training curricula and minimum licensure requirements for new licensees. The licensure process involves subjecting each application to careful scrutiny to ensure that the applicant meets all statutory requirements and does not have a disqualifying criminal record. Then, by conducting routine inspections and investigations, the division monitors licensed individuals and agencies for compliance with regulatory requirements to ensure that each licensee provides services in accordance with the public interest.

Concealed Weapon or Firearm Licenses

The division issues concealed weapon or firearm licenses to qualified individuals who wish to carry a concealed weapon for lawful self-defense. Florida made history in 1987 when it became the first state to issue a statewide concealed weapon license. Currently, more than 971,000 individuals hold such a license. The division's objective is to ensure that the issuance of licenses to qualified individuals and the continued eligibility of those licensees are consistent with the public good. The division reviews each license application to confirm that an applicant is qualified and competent to carry a firearm. Applicants are subjected to criminal history background checks and are screened for disqualifying conditions (mental incapacities, drug or alcohol abuse, felony convictions, domestic violence conviction, etc.). The division also works closely with law enforcement authorities in the name of public safety.

The Division of Licensing is organizationally structured as follows:

Bureau of License Issuance (BLI)

The Bureau of License Issuance is responsible for the issuance and denial of licenses. This bureau receives and examines applications for statutory compliance and verifies each applicant's eligibility for licensure. This verification process involves a review and evaluation of the applicant's prior work history, educational background, and any relevant information revealed by the criminal history background check. During fiscal year 2011-2012, BLI processed 318,906 license applications and received 406,942 phone calls.

Bureau of Regulation and Enforcement (BRE)

The Bureau of Regulation and Enforcement conducts investigations and inspections of licensed individuals and agencies in the private security, private investigation, and recovery (repossession) industries. During fiscal year 2011-2012, BRE's investigators performed 1,280 investigations and 5,107 inspections. Working in conjunction with the Compliance Section, BRE also recommends and carries out disciplinary actions and conducts informal hearings. This bureau provides services to applicants, licensees, and the public at eight regional offices located in Miami, West Palm Beach, Jacksonville, Orlando, Punta Gorda, Tampa, Fort Walton Beach, and Tallahassee. During fiscal year 2011-2012, staff in the eight regional offices processed 65,239 "fast track" concealed weapon or firearm license applications.

Bureau of Support Services (BSS)

The Bureau of Support Services coordinates and performs the division's administrative and support operations. This bureau is responsible for the operation of the division's electronic document management system and other data processing functions (including systems development, implementation, and maintenance). This bureau also operates the mailroom and oversees all accounting functions. During fiscal year 2011-2012, BSS mailroom staff processed 458,266 pieces of incoming mail.

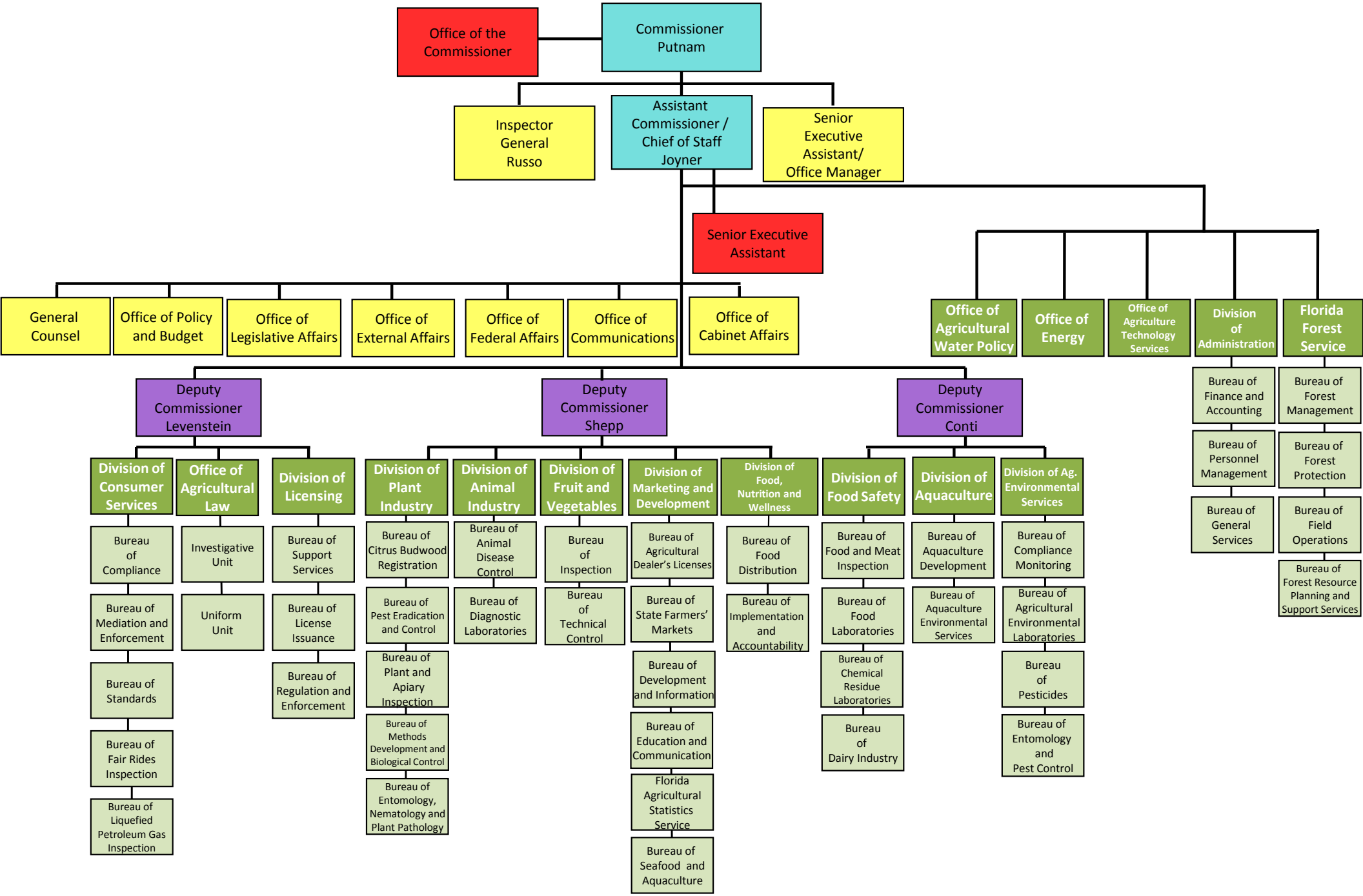
Compliance Section

The Compliance Section takes administrative action against licensees who violate the law and processes denials of applications of individuals who fail to qualify for licensure. The attorneys in this section routinely perform legal research and render legal opinions on matters pertaining to the activities of the regulated industries and on weapons possession and/or ownership. They also represent the division in administrative hearings and other civil and appellate proceedings.

Florida Laws

Chapter 493, F.S.
Section 790.06, F.S.

Florida Department of Agriculture and Consumer Services

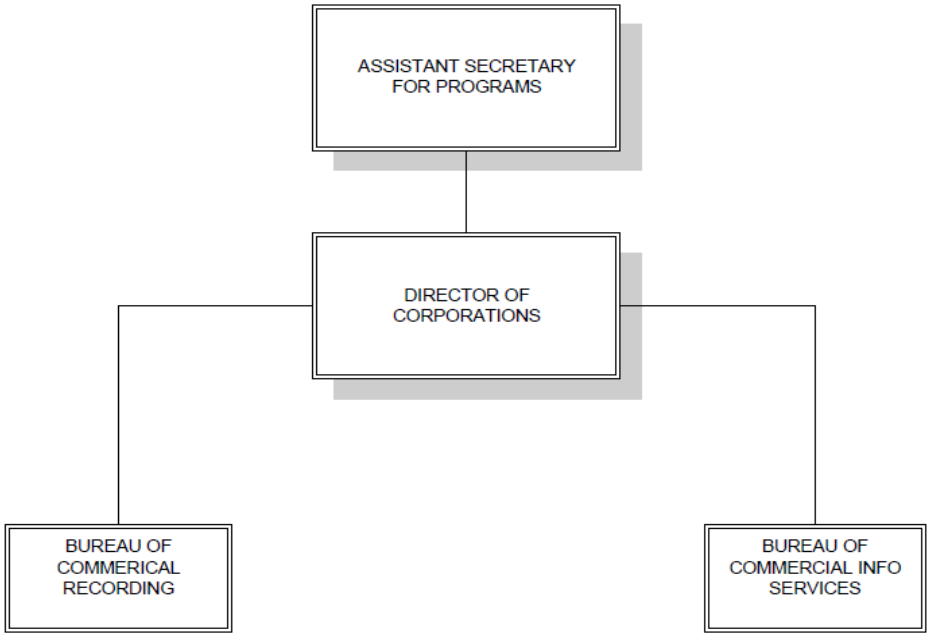


Florida Department of State
Overview of the Division of Corporations

The Department of State's Division of Corporation's mission is to support Florida's economic and commercial growth through the maintenance of a single central registry for recording and retrieving commercial information. To accomplish this mission the Division of Corporations renders two broad functional services: (1) formalizes the legal standing of a business or activity by accepting and indexing the filing or registration, and (2) supplies information and certification regarding the filings and activities of record.

The Division is the most active corporate filing entity in the country. The Division handles several commercial activities that include a variety of business entity filings, trade and service mark registrations, federal lien recordings, judgment lien filings, uniform commercial code financing statements, fictitious name registrations, notary commissions, and cable and video service franchises. In the performance of its duties, the Division is strictly ministerial and has no regulatory responsibilities.

The Division employs 104 full time employees and is comprised of the Director's office and the following two Bureaus: the Bureau of Commercial Recording and the Bureau of Commercial Information Services.



The Bureau of Commercial Recording is tasked with recording all new filing activities such as new business entities, notaries, Liens, and cable franchises. The Bureau ensures that each of the numerous filing types is filed properly and according to statute. Renewals and updates are also processed and recorded by this Bureau including annual reports and amendments.

The Bureau of Commercial Information operates the Division's mail center where paper filings are processed, validated, and certified. The Bureau also processes incoming checks and scans all incoming paper documents for permanent record. The Bureau furnishes certified copies of business organization filings, certificates of status, certificates of notarial authority and apostilles used to authenticate documents both domestically and internationally. Finally, this Bureau also accepts substitute service of process.

The Division is also responsible for Florida's Uniform Commercial Code which allows creditors to file liens on property held as collateral for financial obligations. This function has been outsourced to a private vender on contract through 2017.

Statistical Information

- As of November 2012 there were 1,606,000 active entities registered with the Department of State, thus Florida has more active business entities than any other state. For comparison, Delaware, thought by many to have the most active business registrations due to its business friendly commercial statutes and its court of chancery, has app. 850,000 active entities. New York has 1,499,000, California has 1,391,000, and Texas has 841,000.

- The Division of Corporations has a total operating budget of $7.3M for all expenses. In 2012 the Division generated $280M which was deposited to General Revenue.

- The Division's database of registrations is accessible at www.sunbiz.org, and is the single most used state website, seeing more than 350 million accesses per year. There are more than 25 million images on file with the Division, and more than 20 million microfiche images in long term storage, all of which can be accessed via sunbiz or through an inquiry to the Division of Corporations to pull records manually from microfiche. There are microfiche records at the Division from the 1800s.

- The roughly 90 Document Examiners the Division employs each answer an average of 50 calls a day for assistance or information. During the peak Annual Report season of January through April the call volume often exceeds 100 calls per day per examiner, or between 4,000 and 8,000 calls daily. Likewise, the Division's internet assistance section answers between 100 and 200 technical assistance and filing issues emails daily, again based on season. The turnaround time for answers or documents is rarely more than 24 hours, and usually same day.

Notary Processes

The Division of Corporations processes notary applications for the state. As of October 1, 2012 there were 396,075 commissioned notaries in Florida. All notaries in Florida are required to be bonded and trained prior to becoming commissioned notaries and the commission is good for four years. Both the bonding and training aspects are provided by approximately 20 companies that are certified by the state to provide these services.

There are four components to the state's notary process; applications, commissions, education, and investigation. The Division of Corporations is responsible for applications and commissions. A prospective notary public must attend the proper training, which is managed by the Executive Office of the Governor, and then file an application with the Division of Corporations who process the document, verify the training has occurred against a database, and issue a notary commission. The Division of Corporations has two full time employees that process all notary applications and issue the commissions. Complaints against an existing notary are handled by EOG who investigate the complaint.

Department of Economic Opportunity[1]

Executive Director – Hunting F. Deutsch

Executive Staff

- Chief of Staff – Darrick D. McGhee
- Chief Communications Officer – Carolyn B. Gosselin
- Chief Financial Officer – Tony Lloyd
- Chief Information Officer – Dean Izzo
- Division of Community Development Director – Tom Beck
- Division of Strategic Business Development Director – Michelle Dennard
- Division of Workforce Services Director – Tom Clendenning
- Inspector General – Joseph K. "Joe" Maleszewski
- General Counsel – Robert N. Sechen
- Legislative and Cabinet Affairs Director – Darrick D. McGhee

[1] Information adapted from DEO website, floridajobs.com, and the department's July 2012 overview

DEO OVERVIEW

During the 2011 session, the Florida Legislature called upon state economic development leaders to reevaluate long-standing economic development programs and structures, and formulate new strategies to strengthen job creation efforts. As a result, the Florida Department of Economic Opportunity (DEO) was created from three previously existing entities — the Agency for Workforce Innovation, the Department of Community Affairs and the Governor's Office of Tourism, Trade and Economic Development. Today, DEO combines the state's economic, workforce and community development efforts helping expedite economic development projects to fuel job creation in competitive communities.

Vision Statement

Florida will have the nation's top performing economy and be recognized as the world's best place to do business.

Mission Statement

To promote economic prosperity for all Floridians and businesses through successful workforce, community, and economic development strategies.

Guiding Principles

- Be in a state of readiness to support economic development projects, capital investment and infrastructure opportunities that advance Florida in achieving its vision.
- Be effectively and efficiently responsive to the global business climate.
- Make data-driven decisions and set credible benchmarks.
- Deliver successful, strategic, and clearly articulated performance.

Goals

1. Increase Florida's global competitiveness as a destination for business, capital, talent, innovation, and entrepreneurship.
2. Promote Florida as the world destination of choice for business and industry.
3. Facilitate business development through delivery of world class customer service.

DEO DIVISIONS

DEO is divided into three primary areas: Workforce Services, Community Development, and Strategic Business Development with support from the Offices of the General Counsel, Communications, Inspector General, and Civil Rights.

The **Division of Workforce Services** partners with Workforce Florida, Inc., and the state's 24 Regional Workforce Boards to strengthen Florida's business climate by supporting employers and helping Floridians gain employment, remain employed, and advance in their careers. Initiatives and activities include:

- Provide development and guidance, oversight, technical assistance, federal performance, and financial reporting for the state's workforce programs;
- Produce, analyze, and deliver timely and reliable labor statistics to improve economic decision-making;
- Promote employment of Florida's veterans, especially those with barriers to employment; and
- Provide Florida's reemployment assistance services (formerly unemployment compensation).

The **Division of Community Development** fosters economic development in the state by providing assistance that balances local and state growth management needs. Initiatives and activities include:

- Award grants, loans, and credits for infrastructure, small business assistance, housing rehabilitation, and community revitalization;
- Support community planning and development initiatives while protecting resources of state significance;
- Provide technical assistance and work closely with Florida's Regional Planning Councils and Community Action Agencies; and
- Implement assistance programs for low-income Floridians.

The **Division of Strategic Business Development** provides support for attracting out-of-state businesses to Florida, promoting the creation and expansion of Florida businesses, and facilitating the state's economic development partnerships. Initiatives and activities include:

- Coordinate intergovernmental planning for economic development strategies;
- Facilitate and support economic development projects;
- Monitor and audit economic development incentive and grant performance while working closely with Enterprise Florida, Inc.; and
- Implement Florida's film industry's marketing and incentives.

DEO also has **Divisions of Finance and Administration** and **Information Technology** which provide support to the three divisions discussed above.

The **Labor Market Statistics Center/Labor Market Information** produces, analyzes, and delivers timely and reliable labor statistics to improve economic decision-making. They provide a variety of labor market, economic, and demographic data such as:

- Employment and Wages - current employment, projections, and wages by industry and occupation, occupational profiles, and career information.
- Labor Force - labor force, employment, and unemployment rates.
- Economic Indicators - Florida Price Level Index, Consumer Price Index, income, and unemployment claims data.
- Population - age, race, gender, income, veteran's status, and education information.

Labor market data are provided via reports, publications, CDs, brochures, posters, and the Internet.

DEO INITIATIVES AND ISSUES

Monthly Job Placement Reports – Ongoing

Workforce Florida, Inc., in coordination with DEO, began the release of Monthly Job Placement Reports in January to measure the success of job placements achieved by Florida's 24 Regional Workforce Boards. Monthly reports address Governor Rick Scott's call for enhanced performance measurement in workforce and economic development focused on critical results that bolster Florida's economic recovery and growth. Since January, more than 150,000 job placements have been reported statewide including about 33,700 job seekers who had been receiving unemployment compensation.

State Small Business Credit Initiative - Ongoing

Part of the Small Business Jobs Act of 2010, the State Small Business Credit Initiative (SSBCI) was funded with $1.5 billion to strengthen state programs that support lending to small businesses. SSBCI is expected to help spur up to $15 billion in lending to small businesses. Participating states will use the federal funds for programs that leverage private lending to help finance small businesses that are creditworthy, but are not getting the loans they need to expand and create jobs. It is anticipated that, at minimum, every one dollar in SSBCI funds will result in 10 dollars of new small business lending. Florida is expected to leverage close to $1 billion in new private lending to Florida small businesses.

Economic Development "Strike Teams"- Ongoing

In an effort to develop competitive communities throughout Florida to increase economic development, the Division of Community Development created inter-department and intra-department "strike teams." Teams bring staff from different DEO program areas, public/private partners, and fellow state agencies to the same table when meeting with local governments regarding development or revitalization projects. This allows Community Development staff the opportunity to provide valuable technical assistance, for issues such as permitting, while also bringing in staff from other program areas and state agencies to help identify possible economic development opportunities. This is the first time these various components of the state have all come together to explore every option that could help a local government increase economic development and job creation possibilities.

Florida Five Year Statewide Strategic Plan for Economic Development – Ongoing
DEO is drafting the first-ever Florida Five Year Statewide Strategic Plan for Economic Development to help guide the future of Florida's economy and ensure that Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, work, and do business. The plan is being developed through close coordination and with input from Enterprise Florida, Inc., Workforce Florida, Inc., local governments, local and regional economic development organizations, the business community, educational institutions, and other local, state, and federal agencies. By collaborating throughout the development of the plan Florida's business, community, education, workforce, and government stakeholders are in alignment about promoting economic development in Florida.

Economic Development Incentives – Completed Summer and Fall 2012
DEO and Enterprise Florida, Inc., work collaboratively to promote and manage Florida's economic development incentives to help businesses commit to create jobs in Florida by locating, expanding, or remaining in the state. Enterprise Florida, Inc., is the primary point of contact for businesses with location, expansion, or retention opportunities and markets Florida as the best place to do business. DEO evaluates and recommends incentive applications, monitors contract performance, and makes policy decisions. DEO is committed to the importance of economic development incentives, as well as the tracking, accountability, and confidentiality of these incentives and has implemented the following initiatives this year:

- Economic Development Incentives Portal – July 2012
- Small Business Portal – Summer 2012
- Implementation of Salesforce.com – Fall 2012

Reemployment Assistance Rebranding – Completed July 2012
Under the leadership of Governor Scott, Florida is the first state in the nation to rebrand "unemployment compensation" as "reemployment assistance." The rebranding reflects Florida's focus on training and individualized assistance based on skills assessments and the job market and does not change funding, services, or benefits offered.

OFFICE OF FILM & ENTERTAINMENT

Overview and Brief History:

The Office of Film and Entertainment (OFE) was created within the Executive Office of The Governor on July 1, 1999 by Governor Jeb Bush (FS 288.1251). The purpose of the office is to build, support, and market Florida's film and entertainment industry:

- Market and sell Florida as the best production destination in the world
- Stay apprised of competitors' incentives and business climates; attempt to stay one step ahead
- Assist and support companies throughout the production process
- Administer incentive programs that encourage and retain production activity in Florida
- Sponsor and attend key trade shows and events to stay competitive and attract production to Florida
- Support educational and workforce development activities

Budget and Staff:

- 5 FTEs
- $400K Operating Budget (down from $723,263 in FY 08/09)
    - FY 08/09: $723,263
    - FY 09/10: $453,296
    - FY 10/11: $453,296
    - FY 11/12: $453,296
    - FY 12/13: $400,000
- $296M in Tax Credits (up from $5M in FY 09/10)

Importance of the Industry in Florida:

- Films and Television series can showcase locations and advertise Florida to the world (See next page for the *Dolphin Tale* Study on film-induced tourism)
- Creates high-wage jobs for Floridians; a few examples are:
    - Camera and equipment operators
    - Caterers and food service
    - Electricians
    - Hair and makeup artists
    - Location scouts
    - Police officers and security
    - Set designers and construction
    - Truck drivers and transportation
    - Tutors
    - Wardrobe and prop designers
- Economic benefits extend into other industries, including restaurants, lodging, retail, construction and tourism (an additional estimated 105,000 related spinoff jobs in Florida in 2007)
- Clean/Green Industry
- Workforce skills cross-walk to other key industry sectors (example: military defense, medical , and educational simulation)

Film and Entertainment Industry Wide Employment Data:

The Department of Economic Opportunity Office of Labor Market Statistics provided the following 2011 employment data:

- In 2011, there were 4,240 establishments in the film and entertainment industry in Florida with employment of 21,454 and an annual average wage of $65,398
- In 2011, the average annual wage for workers in the film and entertainment industry in Florida was $65,398 exceeding the state's 2011 annual average wage for all industries of $42,311 by 54.6 percent
- No major employment sector in Florida has a higher annual average wage than the film and entertainment industry

Film and Entertainment Industry Wide Economic Impact:

In 2009 the Haas Center for Business Research and Economic Development at The University of West Florida conducted an economic assessment of the film and entertainment industry as a whole in Florida. The study yielded the following results:

- $17.9 billion in 2007 GSP (Florida's Gross State Product)
- Represents 2.4 percent of the total state GSP
- 207,800 jobs (direct and indirect)
- $8.5 billion in personal income
- $498 million in tax revenue to Florida
- For every $1 spent by a production within Florida, the state sees an additional 95 cents in impact (1.95 multiplier)
- $29 billion total fiscal impact

Film Induced Tourism: *Dolphin Tale*

- University of South Florida School of Business Study Findings:
    - The film *Dolphin Tale* is the driver of approximately 72.7% of visitors to the Clearwater Marine Aquarium
    - Forecasts approximately 800,000 visitors to the Clearwater Marine Aquarium in 2013, growing to 2.3M in 2016
    - Visitors will provide a total economic impact to the local economy of approximately $400M in 2013, which increases to $2.3B in 2016
- Impact on Clearwater Marine Aquarium and Pinellas County
    - Clearwater Marine Aquarium attendance has quadrupled since the movie release
    - Clearwater Marine Aquarium itself has created 100 jobs since the movie release

Incentive Programs:

1. Entertainment Industry Financial Incentive Program (FS 288.1254)
   - $296M in tax credits for six years starting July 1, 2010*
   - 20 - 30% transferable tax credit on qualified Florida expenditures (including wages to Floridians and dollars spent at Florida businesses)
     - 20% base percentage
     - 5% Off Season Bonus (for certain production types)
     - 5% Family Friendly Bonus (for certain production types)
     - 5% Underutilized Region Bonus (for General Production Queue only)
     - 5% Qualified Production Facility/Digital Media Facility Bonus (for General Production Queue only)
     - 15% Florida Student/Recent Graduate Bonus (for General Production Queue only)
   - 60% - 75% of workers on each production must be Florida residents
   - Must spend at least $100,000 in Florida to qualify
   - Tax credits are not awarded until after dollars spent in Florida are reviewed for compliance
   - The priority for certifying projects is determined on a first-come, first-served basis
   - $8 million per production tax credit cap

   *The OFE is permitted by FS 288.1254 to certify tax credits associated with future years of the program; therefore, even though the program sunsets on June 30, 2016, as of November, 2012 there are currently no tax credits available for certification in the general production queue (94% of credits). See chart below for the balance of tax credits remaining by queue:

FINANCIAL INCENTIVE QUEUES	TAX CREDIT BALANCE 11/30/12
General Production Queue	$ 0
Commercial & Music Video Queue	$ 3,226,274
Independent & Emerging Media Queue	$ 1,775,682
Total	**$ 5,001,956**

   - **Financial Incentive Program Performance as of October 15, 2012**
     - Applications Processed: **502**
     - Certified Applications: **243**
     - Projected Total Florida Qualified Expenditures: **$1,305,106,961**
     - Projected Florida Positions: **163,583**
     - Projected Total Wages to Floridians: **$786,387,746**
     - Projected Total Room Nights: **220,228**

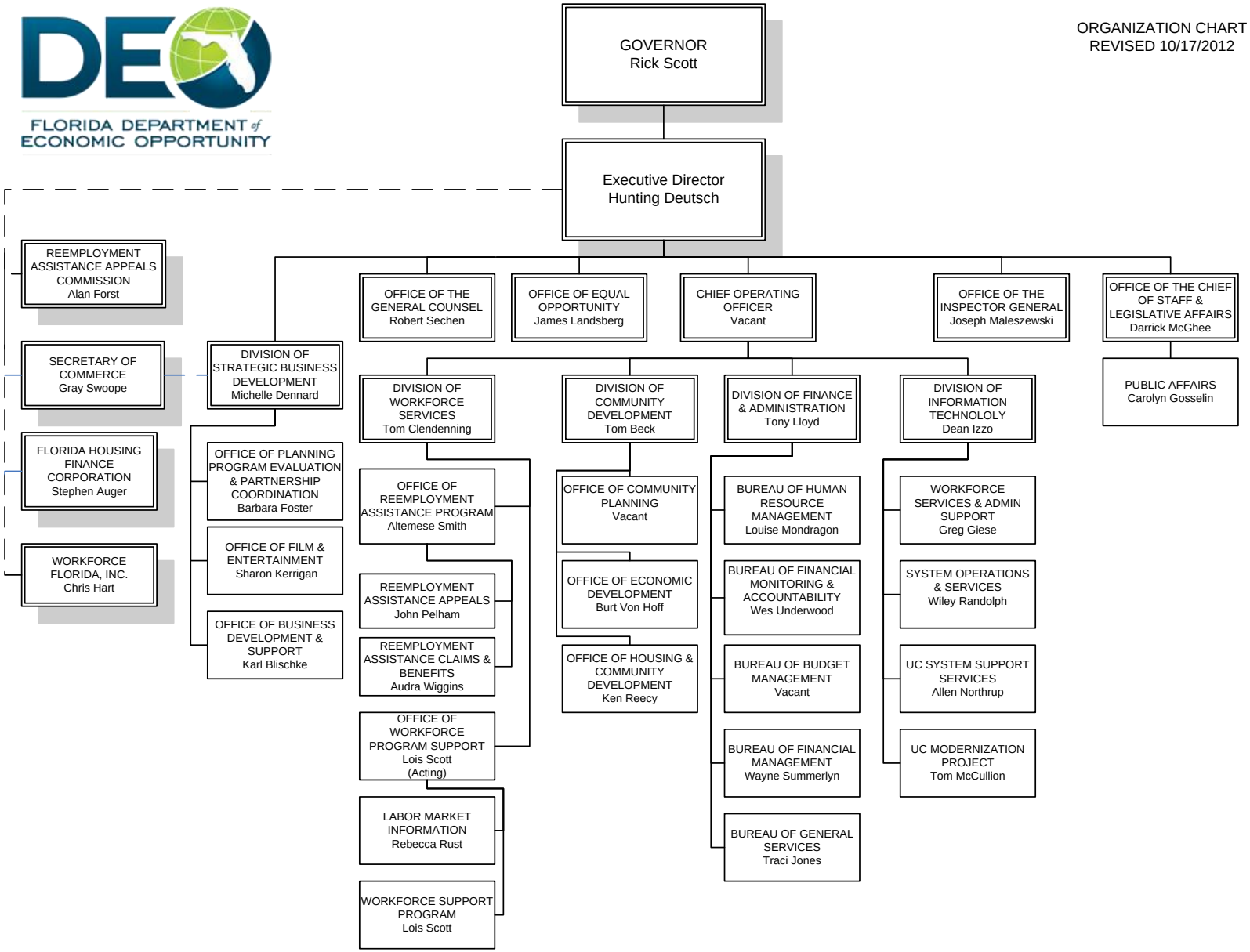
2. Florida Entertainment Industry Sales Tax Exemption (FS.288.1258)
   - Point of sale exemption on the sales and use tax paid for certain items used for production activities in Florida.
   - Any production company engaged in the production of motion pictures, television series, commercial advertising, music videos or sound recordings in Florida may be eligible.

Notable Recent Florida Productions:

- Motion Pictures**:**
  - *Iron Man 3* – Starring Robert Downey Jr., Gwyneth Paltrow, and Jon Favreau
  - *Pain and Gain* – Directed by Michael Bay, Starring Mark Wahlberg, Dwayne Johnson and Ed Harris
  - *Magic Mike* - Starring Matthew McConaughey and Channing Tatum (total box office $114M)
  - *Rock of Ages* – Starring Tom Cruise, Alec Baldwin, Paul Giamatti and Catherine Zeta-Jones
- Television:
  - *Burn Notice* (USA) - Starring Jeffrey Donovan, Gabrielle Anwar, and Bruce Campbell
  - *The Glades* (A&E) - Starring Matt Passmore, Kiele Sanchez, and Carlos Gomez (the series premiere was the most watched original drama in A&E history)
  - *Graceland* (USA) - Starring Daniel Sunjata, Aaron Tveit, and Vanessa Ferlito (new series currently filming season 1)
  - *Emeril's Florida (Cooking Channel)* – Starring Emeril Lagasse (new series currently filming season 1)
  - *Caso Cerrado* (Telemundo Studios) - Emmy-nominated court show (ranked #1 Spanish language program at 4pm across key demographics)
- Digital Media & Games:
  - *Augmented Reality Simulation for Medical Students*
  - *Madden NFL 2013*
  - *NCAA Football 2013*
  - *Super Suite Algebra*
- Commercials:
  - Acura
  - Adidas
  - Burger King
  - Citibank
  - Crest
  - Diet Pepsi
  - Dr. Pepper
  - Gatorade
  - Gillette
  - Nike
  - Office Depot
  - Volkswagen

FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

ORGANIZATION CHART
REVISED 10/17/2012



FLORIDA'S WORKFORCE SYSTEM

Adapted from Workforce Investment Act 101: A Toolkit for Elected Officials

Florida's workforce system is a major contributor to national, state and local economic recovery and growth efforts. The system includes Workforce Florida Inc., the statewide board of business and government leaders charged with setting state workforce policy; the Department of Economic Opportunity, the state agency responsible for administrative and fiscal affairs and policy implementation; and 24 Regional Workforce Boards, which oversee the design and delivery of workforce services to businesses, job seekers and workers at nearly 100 One-Stop Career Centers throughout the state.

Created by the Florida Workforce Innovation Act of 2000, the system is designed to foster public-private partnership and leadership in responding — through demand-driven, market-relevant strategies and services — to the employment and training needs of businesses, job seekers and workers.

The legislative cornerstones for the publicly funded state system — the federal Workforce Investment Act of 1998 and the Florida Workforce Innovation Act, Chapter 445 Florida Statutes — provide for state and local flexibility in addressing workforce development demands and priorities.

Florida's workforce vision is to "develop a globally competitive workforce."

Florida's workforce mission is to "develop the state's business climate by designing and implementing strategies that help Floridians enter, remain and advance in the workforce becoming more highly skilled and successful, benefiting Florida business and the entire state."

While Workforce Florida provides systemwide oversight and leadership, the contributions of every entity, local and state, are integral to overall effectiveness in promoting an environment that aligns the talent development needs of businesses and job seekers, cultivates a world-class talent base for every business (particularly those in targeted sectors and infrastructure industries, such as energy, healthcare and transportation, that underpin the economy); and makes relevant training and education as well as employment and career advancement opportunities available to Floridians.

The Florida Legislature serves an essential role, as legislators must approve the receipt and distribution of federal funding. The Senate President and House Speaker also appoint two legislators from each chamber to serve on the Workforce Florida Board of Directors.

On the front lines, Regional Workforce Boards direct local investment, design local strategies and deploy local services such as career counseling, job search and placement assistance and training for job seekers and recruitment and assessment services and training for employers. Workforce services also are accessible online statewide through the Employ Florida Marketplace at www.EmployFlorida.com.

Portions of this chapter have been adapted from Workforce 101: A Toolkit for Elected Officials, a publication produced by the National Association of Workforce Boards in collaboration with the National Association of Counties, the National Governors Association, the National League of Cities and the United States Conference of Mayors.

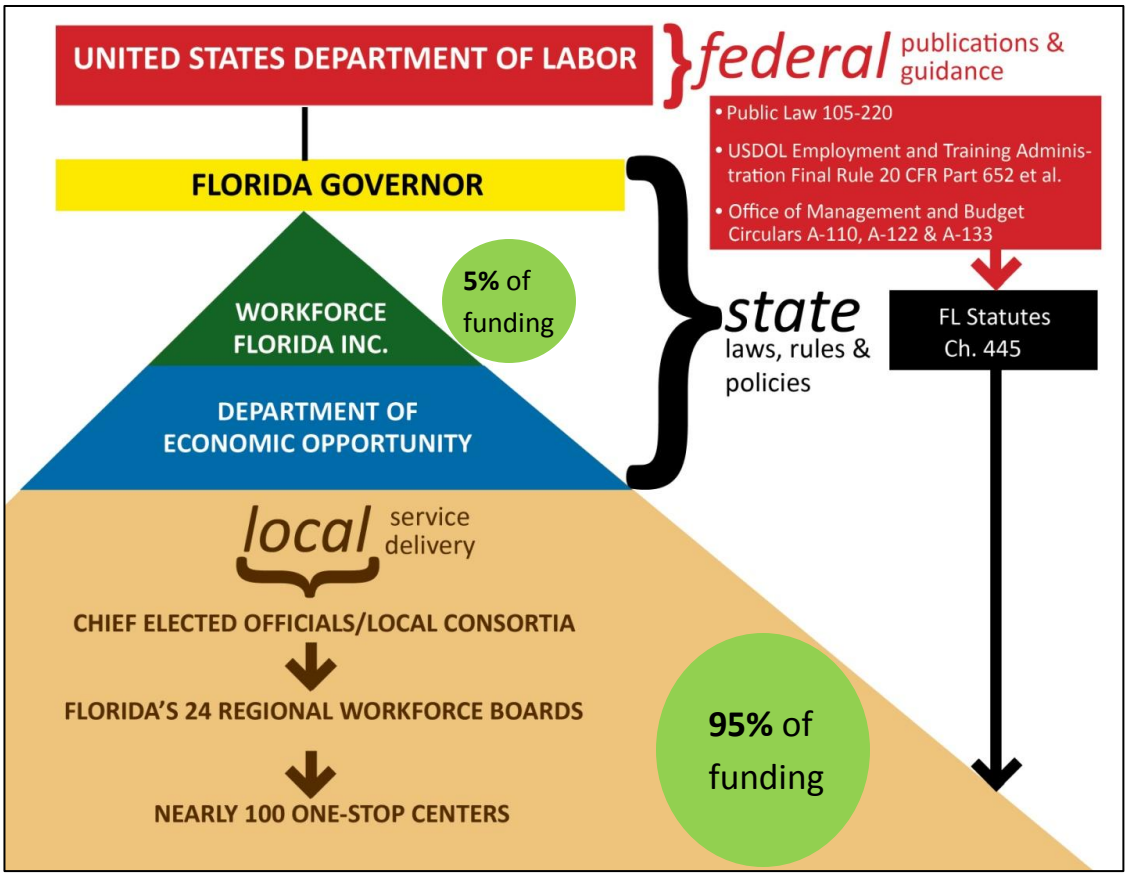


Figure 1. This graphic illustrates the flow of federal laws, publications and guidance, which inform state and local laws, rules and policies. It also reflects the distribution of federal workforce funds, with the majority of workforce funds being passed on to the local level, where service delivery occurs.

WORKFORCE FUNDING, ROLES AND RESPONSIBILITIES

Workforce Funding

The federal Workforce Investment Act of 1998 aims "to consolidate, coordinate, and improve employment, training, literacy and vocational rehabilitation programs in the United States." The Act has five titles, the first of which authorizes the nation's public workforce development system. "Title 1 – Workforce Investment Systems" authorizes state and local Workforce Investment Boards to establish a formula by which funds for youth, adult and dislocated workers programs flow from the federal level, through the states and to the local level; establishes performance metrics; and authorizes the nation's youth workforce development and One-Stop Career Center systems.

The majority of Florida's workforce funding is federal and received annually by the state, in several streams with specific purposes supporting job search, job placement and training needs of job seekers as well as business services such as talent matching and human resources support. Most of these funds – 95 percent in Fiscal Year 2012-2013 – are passed on to the state's 24 Regional Workforce Boards for local service delivery. The remaining 5 percent may be retained at the state level for use by the Governor to address statewide workforce needs. The largest funding streams – Workforce Investment Act, Wagner-Peyser and Temporary Assistance for Needy Families – support the majority of state workforce services.

- **Workforce Investment Act** funds provide core, intensive and training services to adults, youth, laid-off workers and people facing employment barriers or who have low income. Core services may

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include activities such as job search assistance and planning or resume help, while intensive services may include more targeted career guidance and planning as well as individual or group counseling. Training services may include programs to help workforce customers upgrade skills to better their chances of getting a job or advancing in their current position. Training services also may include customized training to help businesses provide incumbent employees or new hires with the training needed for the business to remain competitive.

- **Wagner-Peyser** funds support labor exchange services at local One-Stop Career Centers to place people in employment by providing a variety of placement-related services at no cost to job seekers and employers seeking qualified workers to fill vacancies. These funds also support public outreach for Employ Florida, the universal affiliate brand identity, which helps to link workforce services and partners helping job seekers and businesses connect to employment and training resources.

- **Temporary Assistance for Needy Families (TANF)** funds serve low-income families with children. TANF strongly emphasizes "work first," combining time limits for participation and sanctions with added assistance in obtaining needed training, starting work, receiving childcare, transportation and transitional supports to retain employment, advance and become self-sufficient.

Other funding streams support dedicated veterans employment assistance programs and assist agencies with costs associated with operating the Food Stamp program and administering Reemployment Assistance services.

Roles and Responsibilities

Opportunities to set the policy direction for the federal workforce funds that flow into states exist at multiple levels of government. Florida workforce roles and responsibilities are designated by both federal and state law. Roles of state and local elected officials include the following:

Florida's Governor:

- Is liable for workforce funds received by the state. To manage those funds, the Governor designates a state agency – the Department of Economic Opportunity – to receive and disperse the money.
- May align a wide range of funding streams with Workforce Investment Act funds, creating a core workforce development and delivery system and supporting related programs. For instance, the Governor has the option under Title 5 of the federal Workforce Investment Act to develop a unified plan covering multiple funding streams within his/her purview. Governors also may go beyond joint planning and require One-Stop Career Centers to be the only delivery point for workforce programs under direct state control.
- Is responsible for appointing members and serving on the Board of Directors for Workforce Florida, the state workforce investment board. Workforce Florida must produce a State Plan outlining the state's workforce delivery system and submit it to the U.S. Department of Labor Employment & Training Administration for approval.
- Must approve a Chief Elected Official's request to appoint additional members to the Board of Directors of Regional Workforce Boards above the minimum required membership established by the Workforce Investment Act. The Governor also may remove a Regional Workforce Board member or executive director for cause.
- Has discretion over funding for statewide employment and training activities and for statewide response to layoffs, called Rapid Response.

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Each Workforce Region's Chief Elected Official (CEO):

- Is designated in an interlocal operating agreement covering each of Florida's 24 workforce regions. The CEO's role is critical, as the vast majority of the funds flow to the local level to be invested in alignment with a local plan.
- Is liable for workforce funds, which can be administered either by local government or by a fiscal agent designated by the CEO. Regional Workforce Boards must receive CEO approval of annual budgets and must submit them to Workforce Florida for review.
- Appoints Regional Workforce Board members, who are accountable to the CEO for planning and oversight of public workforce services delivered in the region.
- Has control over local resource alignment as well as the opportunity to facilitate the connection of Workforce Investment Act programs with high schools, post-secondary institutions, public housing agencies, human service agencies and other people-serving entities or organizations.
- Collaborates with Regional Workforce Boards to develop the local plan and also approves the plan. This plan should be based on the local labor market and workforce needs and aligned with local priorities, which would be defined by the CEO or board of local elected officials. Typically, the local workforce board also develops a strategy, documented in the local plan, for connecting employers with services available through the public workforce system.
- Has many opportunities to leverage resources to achieve economic development goals. Since most Florida workforce regions cover areas governed by multiple elected officials, elected officials are encouraged to collaborate to create a comprehensive economic development plan for their communities. Additionally, Regional Workforce Boards are able to inform economic development plans for their communities and invest in workforce development strategies aligned with economic development goals.

The Florida Legislature:

- Must approve the receipt and distribution of federal funding. The Legislature also should be aware of the state plan (or the unified plan, if one is developed), which is the operating blueprint for the state's workforce investment system. The plan also may include discretionary talent development programs that would be part of the Governor's overall budget request.
- Has four representatives – two from the Florida Senate and two from the Florida House of Representatives – who serve on the Workforce Florida Board of Directors. They are appointed by the Senate President and House Speaker.

FLORIDA'S WORKFORCE SYSTEM PARTNERS

Workforce Florida Inc.

The Workforce Investment Act requires each state to have a statewide workforce investment board. Workforce Florida fulfills this role. The Board of Directors is composed of a majority of private sector business leaders who are volunteers and appointed by the Governor – at least one-half must be representative of small businesses and at least five members must have economic development experience. The board also includes two members from each legislative chamber, the directors of the Department of Economic Opportunity and the Agency for Persons with Disabilities, the Florida Commissioner of Education and secretaries of Elder Affairs, Children and Families and Juvenile Justice. All members serve voluntarily and are eligible to serve no more than two, three-year terms. Workforce Florida's governing board and councils meet quarterly. In addition to the Board of Directors, the current governance structure includes an Executive Committee and three policy councils, Finance and Efficiency, Global Talent Competitiveness and Performance.

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The board is led by Chairman Dwayne Ingram of Crimson Consulting and Vice Chair Jennifer Grove of Gulf Power Company. Supporting the board is a professional staff led by President/CEO Chris Hart IV. Through demand-driven, business-led strategies and investment, Workforce Florida focuses on statewide strategies for addressing today's and tomorrow's talent needs for Florida. Examples of statewide initiatives funded and advanced by Workforce Florida include:

- **Quick Response Training (QRT) Grants:** Through partial reimbursement, this nationally recognized program provides customized training for new or expanding businesses. For the fiscal year ending June 30, 2012, Workforce Florida awarded Quick Response Training grants totaling nearly $5.9 million to support the creation of 3,990 new jobs and provide skills upgrade training for 4,888 existing full-time employees. On average, trainees' wages increased by more than 47 percent within a year of completing QRT-supported training.

- **Incumbent Worker Training (IWT) Grants:** Incumbent Worker Training grants help established businesses maintain a competitive workforce by partially reimbursing training to upgrade employees' skills. Businesses need only one full-time employee to potentially qualify. From July 2011 through June 2012, Workforce Florida awarded 230 Incumbent Worker Training grants totaling more than $6.1 million to help companies train and retain more than 12,000 full-time workers. Trainees' wages have increased more than 25 percent on average within a year of completing IWT-supported training.

- **The Employ Florida Marketplace:** The Employ Florida Marketplace at www.EmployFlorida.com is the state's comprehensive online employment resource and virtual gateway to Florida workforce services and resources, providing access 24 hours a day, seven days a week at no cost. More than 100,000 Florida companies are registered and use the Marketplace for employee recruitment, screening and training services and resources. The Marketplace provides businesses access to more than 400,000 job seekers' resumes; job seekers can access more than 150,000 job listings as well as resume building assistance, skills assessment tools and more.

- ***Hiring Florida's Heroes:*** A partnership between Workforce Florida, the Florida National Guard and the departments of Economic Opportunity, Military Affairs and Veterans Affairs as well as leading state business organizations, *Hiring Florida's Heroes* connects returning National Guardsmen and military veterans with employers using a toll-free hotline (866-352-2345) and website – veterans.employflorida.com. When employers call, they are connected to a workforce specialist who can directly assist them by helping enter job listings, providing referrals for qualified candidates and creating customized lists of qualified candidates based on the skill sets they need.

At both the state and local levels, working collaboratively with education partners is critical to improving Florida's talent pipeline and talent supply. Systemwide performance and accountability also are paramount. Through its evaluation of outcomes and financial resources, Workforce Florida measures performance by Regional Workforce Boards, identifies best practices, rewards high performance and, through the leadership of the Department of Economic Opportunity, identifies and addresses performance problems that may require technical assistance. Examples of performance measures consistently examined include job placements, employment retention, earnings and occupational credentials.

While there are many tools used to track performance, a relatively new management resource is the Daily and Monthly Job Placement Report, which was created to provide better, real-time measurement

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of job placement performance by regional boards and One-Stop Career Centers. It provides local and state workforce partners with a performance overview of the number of reported job placements by each regional board as well as a statewide total. The goal of the report is to highlight and share job placement successes so that workforce system partners can identify and replicate best practices and strategies to help job seekers gain employment. The monthly reports are available online through the Department of Economic Opportunity's website at www.floridajobs.org/MonthlyRWBJobPlacementReport.

The Department of Economic Opportunity

The Department of Economic Opportunity (DEO), led by Executive Director Hunting Deutsch, is responsible for receiving Florida's federal workforce funds. It houses Florida's Labor Market Statistics Center and administers the state's Reemployment Assistance program, which provides unemployment compensation to eligible unemployed Floridians seeking new jobs. Through a performance-based contract with Workforce Florida, as required by state law, DEO performs fiscal and administrative duties affecting Regional Workforce Boards including financial and programmatic monitoring and implementation of new policies set by the Workforce Florida Board of Directors.

In collaboration with Workforce Florida and Enterprise Florida Inc., DEO is point on the cross-agency effort underway to transition state-led economic development efforts to a high-level, one-stop business, marketing and sales effort with reduced response times and barriers to business expansion opportunities. This transition supports statewide strategies to attract out-of-state businesses to Florida, promote the expansion of existing businesses and establish measures to track the success of these efforts over time.

DEO was created in October 2011 to streamline state community planning and development as well as workforce and economic development functions and promote economic opportunities for all Floridians. DEO replaced the former Agency for Workforce Innovation and also absorbed responsibilities of the Department of Community Affairs and the Office of Tourism, Trade and Economic Development formerly housed within the Executive Office of the Governor.

Regional Workforce Boards

Florida has 24 Regional Workforce Boards responsible for overseeing the local delivery of workforce services to job seekers and businesses through nearly 100 bricks-and-mortar One-Stop Career Centers statewide (*See Fig. 2)*. Available services include job placement and recruitment assistance as well as funding for skills training. Regional boards' efforts often are geared toward specific industries as targets due to demand and wage potential. The flexibility built into the system allows each region to collaboratively determine with its local leadership – including Chief Elected Officials among others – what employment and training services are most needed in their communities, and to support economic development priorities that are most likely to lead to job placement and advancement while bolstering business competitiveness. Regional boards are essential to the state's efforts to strengthen the economy through business attraction and retention.

Like Workforce Florida, each of the 24 local boards is led by a public-private volunteer Board of Directors with majority representation from the business community along with leaders from education, economic development, government, labor and community-based organizations. Each regional board has performance measures and contracts to strengthen accountability.

Contact information for Regional Workforce Board leaders can be found by visiting www.WorkforceFlorida.com and clicking "Regional Workforce Boards and One-Stop Centers."

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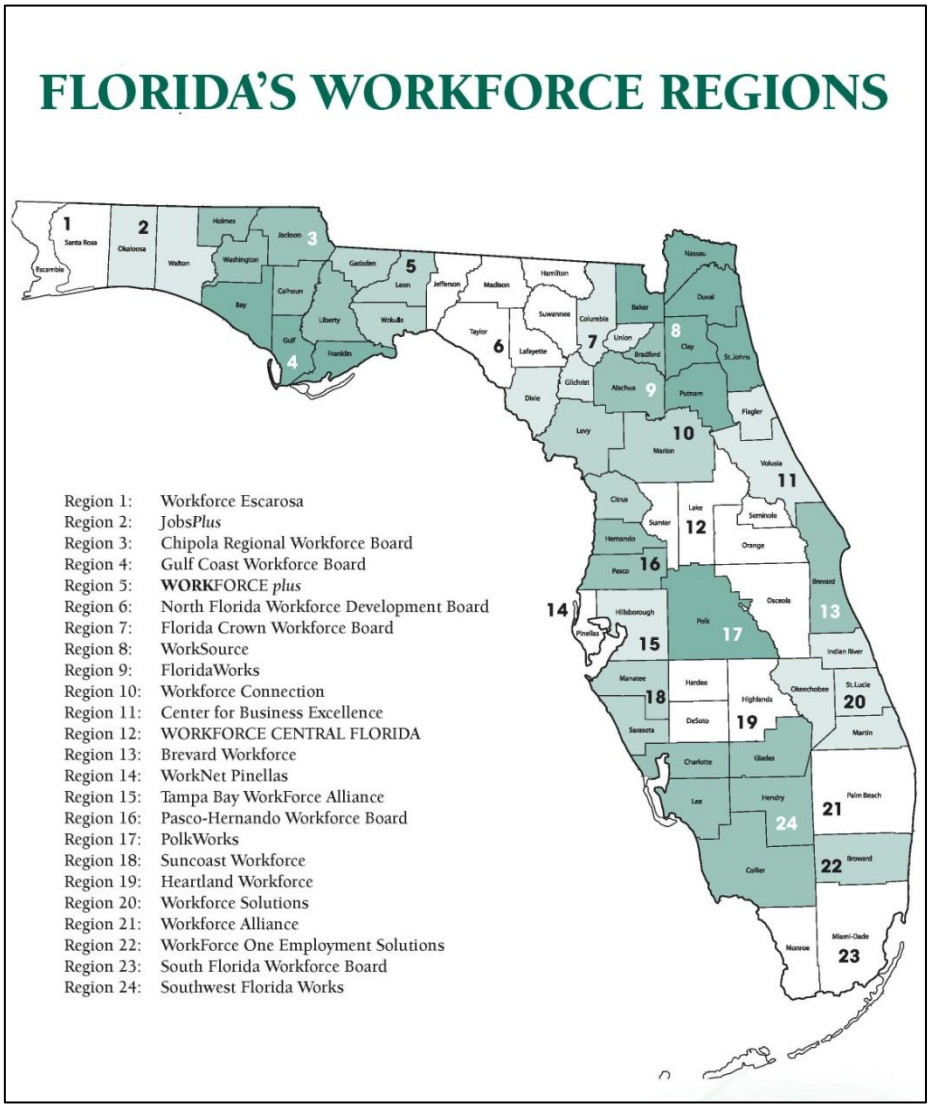

Figure 2. Map of the state's 24 Regional Workforce Boards.

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Enterprise Florida Inc.

Enterprise Florida Inc. is a not-for-profit partnership between Florida's businesses and government leaders and serves as the primary economic development organization for the state. When the corporation was formed in July 1996, Florida became the nation's first state to close its commerce department and place full principal responsibility for economic development, international trade and statewide business marketing into the hands of a public-private partnership organization.

Enterprise Florida focuses on attracting, retaining and expanding Florida businesses by targeting the following growth industries: aviation/aerospace, cleantech, financial/professional services, homeland security/defense, information technology, logistics and distribution and life sciences. However, strategic targets for new and expanded business opportunities also include corporate headquarters establishment, emerging technologies and manufacturing represent strategic areas of emphasis. The goal is to retain and recruit firms that can pay annual wages higher than the state's yearly average.

To fulfill its mission, Enterprise Florida collaborates with a statewide network of "partners" -- regional and local economic development organizations. Together, they strive to improve Florida's business climate and ensure its global competitiveness. Florida competes with many countries as well as other states to generate business investment and more jobs.

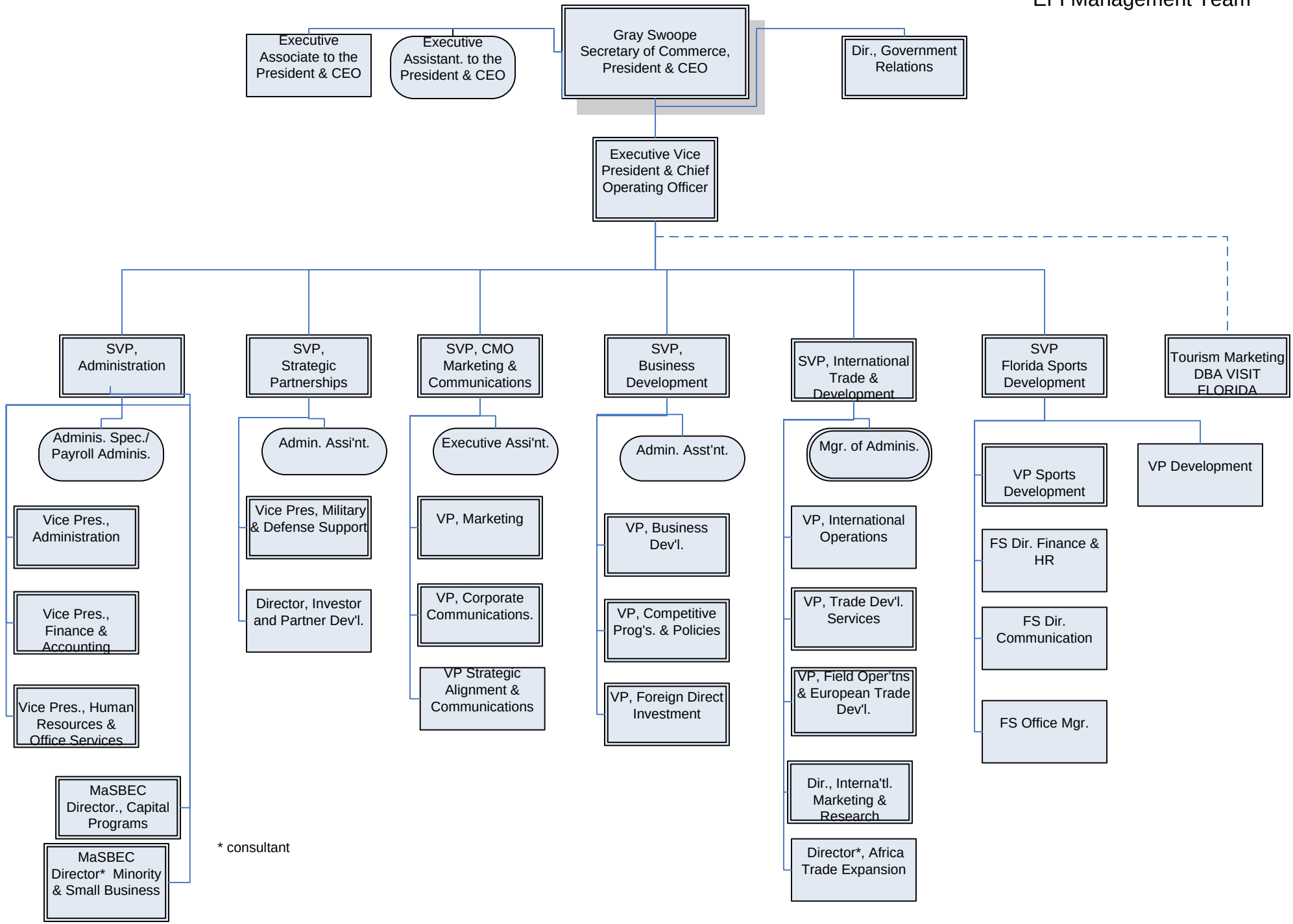
On the international end, Enterprise Florida's works to attract foreign direct investment and increase the state's exports. These efforts focus on the targeted industries via trade and inbound missions and export assistance services. Aside from maintaining a presence in 14 foreign markets, Enterprise Florida works closely with the U.S. Foreign Commerce Service worldwide. Furthermore, Enterprise Florida works to ensure that Florida remains competitive through a robust marketing program.

Oversight of Enterprise Florida occurs through a board of directors, chaired by Florida's governor, comprising top business, economic development and government leaders. Integrated into the corporation as an outcome of the 2011 legislative session are the Florida Sports Foundation and Florida Black Business Investment Board (FBBIB). Based in Tallahassee, Florida Sports is the state's lead organization for promoting and developing its sports industry. It is a private, not-for-profit corporation operating as an Enterprise Florida division. FBBIB has transitioned to small and minority business development initiatives via the Minority & Small Business, Entrepreneurship and Capital division (MaSBEC). MaSBEC develops strategic partnerships to expand Florida's business support services and streamline the regulatory environment to spur growth for small companies. MaSBEC works directly with firms that also are committed to providing small businesses with access to resources that can stimulate job creation.

Fast Facts ...

- Funded by a combination of state appropriations and private sector contributions. State funding for the 2012-13 fiscal year (FY): $16 million.
- Private businesses contributed $1.425 million during FY 11-12, which was used for economic diversification initiatives.
- Responsible for facilitating the creation and retention of 25,339 jobs statewide in FY11-12 and $1,513,000,000 in capital investment.
- Helped Florida companies produce more than $643 million in actual and expected sales through export development programs. More than $587 million of that total fell within the targeted industries.

EFI Management Team



* consultant

M.Miller

11/28/2012

VISIT FLORIDA

VISIT FLORIDA, the state's official tourism marketing corporation, serves as Florida's official source for travel planning to visitors across the globe. VISIT FLORIDA is not a government agency, but rather a not-for-profit corporation created as a public/private partnership by the Florida Legislature in 1996.

As the state's number one industry, tourism was responsible for welcoming 87.3 million visitors in 2011 who spent more than $67.2 billion, generating 23 percent of the state's sales tax revenue and employing more than 1 million Floridians. For every $1 spent on tourism marketing, VISIT FLORIDA generates more than $258 in tourism spending and $15 in new sales tax collections, paid by visitors, not residents. Every 85 visitors to the Sunshine State support one Florida job.

Additional funding is secured from the private sector to expand VISIT FLORIDA's marketing dollars. Last fiscal year, VISIT FLORIDA raised nearly $95 million in private sector matching funds. This is done by actively recruiting the state's tourism industry to invest as Partners through cooperative advertising campaigns, promotional programs and many other pay-to-play ventures. Through this public/private partnership, VISIT FLORIDA serves nearly 12,000 tourism industry businesses, including 2,700 invested Partners, 8,900 web affiliates and major strategic alliance partnerships with Disney Destinations, Dollar Rent A Car, The Hertz Corporation, SeaWorld Parks & Entertainment and Universal Orlando.

VISIT FLORIDA facilitates tourism industry participation in domestic and international travel trade and consumer shows, as well as media missions to the top global visitor markets. VISIT FLORIDA also works closely with travel agents, tour operators, meeting and event planners, and is responsible for operating Florida's five Official Welcome Centers.

VISIT FLORIDA has 117 full-time employees in Florida and an international team of contracted staff covering Canada, China, India, Germany, Latin America and the United Kingdom. VISIT FLORIDA's corporate office is located at 2540 W. Executive Center Circle, Suite 200, Tallahassee, Florida 32301. The office can be reached at (850) 488-5607.

VISIT FLORIDA's Mission

To promote travel and drive visitation to and within Florida

VISIT FLORIDA's Vision

VISIT FLORIDA establishes Florida as the No. 1 travel destination in the world

VISIT FLORIDA's Values

• Integrity • Excellence • Innovation
• Inclusiveness • Welcoming • Fun
• Teamwork

To learn more about VISIT FLORIDA, go to VISITFLORIDA.org or follow our corporate blog at SunshineMatters.org.

VISITFLORIDA.

ECONOMIC ANALYSIS OF AEROSPACE IN FLORIDA[1] - 2011

Vision 2020

Market Horizons

Florida has the aerospace services and marketplace edge like no other region in the world. This is due to its vast aerospace infrastructure and talent pool, aerospace-related target industries, and its geospatial position on the planet's surface.

	Total # of Aerospace-Related Companies (reported)	Total # of Aerospace Industries Employees (reported)	Total Aerospace Industries Sales/ Revenues* (reported)
FLORIDA TOTAL	**3,891**	**74,232**	**$9,163,193,758**
FL COUNTY			
Alachua	65	595	$56,346,800
Baker	-	-	$0
Bay	41	1,159	$19,365,995
Bradford	1	4	$0
Brevard	150	3,058	$292,065,694
Broward	484	5,397	$1,262,301,575
Calhoun	-	-	$0
Charlotte	27	142	$21,426,124
Citrus	21	91	$8,744,400
Clay	19	220	$28,625,197
Collier	73	537	$79,134,881
Columbia	8	45	$8,460,512
DeSoto	5	256	$65,291,500
Dixie	-	-	$0
Duval	193	5,160	$440,336,978
Escambia	62	825	$103,222,843
Flagler	13	74	$9,199,500
Franklin	-	-	$0
Gadsden	3	156	$15,463,900
Gilchrist	-	-	$0
Glades	1	3	$150,000
Gulf	2	3	$193,000
Hamilton	1	6	$343,500
Hardee	2	157	$320,300
Hendry	1	1	$50,000
Hernando	24	90	$7,068,400
Highlands	5	45	$3,008,700
Hillsborough	259	4,528	$1,200,403,911
Holmes	2	11	$1,069,000
Indian River	30	224	$24,175,900
Jackson	5	48	$2,143,900
Jefferson	-	-	$0
Lafayette	-	-	$0
Lake	42	255	$31,863,335

	Total # of Aerospace-Related Companies (reported)	Total # of Aerospace Industries Employees (reported)	Total Aerospace Industries Sales/ Revenues* (reported)
FLORIDA TOTAL	**3,891**	**74,232**	**$9,163,193,758**
FL COUNTY			
Lee	138	1,286	$161,018,137
Leon	61	1,029	$97,715,350
Levy	7	22	$1,712,500
Liberty	-	-	$0
Madison	1	2	$166,700
Manatee	49	468	$57,512,375
Marion	53	389	$37,611,300
Martin	70	570	$85,452,300
Miami-Dade	551	7,081	$1,053,891,822
Monroe	12	59	$11,100,500
Nassau	15	80	$13,800,090
Okaloosa	39	16,490	$35,604,439
Okeechobee	7	67	$12,967,022
Orange	276	7,096	$1,340,189,994
Osceola	28	995	$55,614,100
Palm Beach	322	4,447	$969,848,683
Pasco	63	892	$117,114,918
Pinellas	204	4,176	$640,205,460
Polk	73	812	$82,749,149
Putnam	6	23	$3,966,900
Saint Johns	34	1,321	$260,552,786
Saint Lucie	39	526	$78,373,402
Santa Rosa	14	112	$8,594,324
Sarasota	97	1,069	$114,591,594
Seminole	97	936	$108,482,949
Sumter	13	70	$10,242,172
Suwannee	1	4	$0
Taylor	1	4	$106,700
Union	-	-	$0
Volusia	68	1,023	$115,062,693
Wakulla	1	1	$90,000
Walton	9	84	$7,557,454
Washington	3	8	$522,100

[1] Preliminary 2011 Economic Analysis Results based on Dun and Bradstreet data for 2010 , using NETS data (at 8 digit SIC/NAICS level of detail) and compiled by The Florida State University Center for Economic Forecasting and Analysis (FSU CEFA)

*The total aerospace industries sales and revenues for Florida counties are displayed in $2010.

SPACE FLORIDA is the State of Florida's spaceport authority and aerospace economic development agency. Our mission is to advance the state's aerospace industry and ensure Florida maintains global leadership in the aerospace marketplace.

In the last 12 months alone, **Space Florida** has enabled 15 new or growing aerospace-related programs to thrive in our state, resulting in an anticipated 1,791 jobs within the next five years. This has been accomplished with **Space Florida** providing only 9 percent of the overall investment for these companies. Currently, the agency has more than 80 working projects in the pipeline, representing the potential for an additional 7,609 jobs within five years.

FLORIDA'S RECENT AEROSPACE ECONOMIC DEVELOPMENT ACCOMPLISHMENTS

SPACE FLORIDA provides $35 million investment for Lockheed Martin refurbishment of the Kennedy Space Center (KSC) Operations and Checkout Facility, creating a modernized processing site for the Orion Crew Exploration Vehicle Program. First two vehicles delivered July 2012.

FEBRUARY 2011: **SPACE FLORIDA** and Bigelow Aerospace sign Memorandum Of Understanding to market its inflatable, orbiting R&D complex.

MAY 2011: Masten Space Systems signs contract with **SPACE FLORIDA** to conduct demonstration launches from Launch Complex 36 at Cape Canaveral.

OCTOBER 2011: Boeing, **SPACE FLORIDA** and NASA-KSC announce the establishment of its Commercial Crew Program Office in Florida.

SPACE FLORIDA and the Instituto Nacional de Técnica Aeroespacial (INTA) sign a Memorandum Of Understanding during a Spanish trade mission to further enhance business development opportunities between Florida and Spain in the aerospace sector.

SPACE FLORIDA and UK-Based A|D|S sign Memorandum Of Understanding during overseas trade mission.

DECEMBER 2011: Eisenhower Center For Space And Defense Studies Hosts First Annual U.S Space Forum, sponsored by **SPACE FLORIDA**.

JANUARY 2012: **SPACE FLORIDA** announces Sub-Orbital Flight Incentive Program providing partial reimbursement for customers to fly research payloads from Florida.

Florida's major aerospace players represented at Florida Space Day in Tallahassee.

SPACE FLORIDA provides $62+ million in conduit financing to support the build-out of the Space Shuttle Atlantis exhibit at Kennedy Space Center Visitors Complex. Groundbreaking occurs in January 2012.

MAY 2012: SpaceX successfully launches the Falcon 9/Dragon Capsule mission from Florida that leads the way for next-generation U.S. commercial space initiatives – reducing our dependence on other countries to ferry cargo to and from the ISS.

Exploration Park – a cutting-edge R&D complex on KSC grounds – achieves milestone in horizontal infrastructure build with the opening of the park's first road, providing more direct access to the Space Life Sciences Lab.

Sierra Nevada Corporation announces interest in Florida as a base for its commercial human spaceflight programs and facilities.

JULY 2012: Rocket Crafters announces intention to bring Corporate Headquarters to the Space Coast Regional Airport in Titusville.

SPACE FLORIDA Signs Agreement With ENSCO, Inc. to lead a statewide Unmanned Aerial Systems (UAS) Initiative.

SPACE FLORIDA meets with 22+ companies at the Farnborough International Air Show to explore new opportunities for Florida.

SPACE FLORIDA and the FAA announce findings from a Tauri Group 10-year study on the potential of the suborbital marketplace.

AUGUST 2012: NASA announces Commercial Crew Integration Capability (CCiCap) winners as The Boeing Company, SpaceX and Sierra Nevada – all having or planning a Florida presence and working with **SPACE FLORIDA** on infrastructure and/or program support to lead next-generation U.S. commercial space initiatives.

2011

JANUARY 2011: **SPACE FLORIDA** Receives IDIQ Contract from Department Of Defense with a maximum $48 million value to provide Florida-based Minotaur launches for the federal government from Launch Complex 46 at Cape Canaveral.

APRIL 2011: **SPACE FLORIDA** provides $1.1 million to AAR for hangar space at Melbourne International Airport and announces 225 new jobs within six months.

SEPTEMBER 2011: **SPACE FLORIDA** invests $1 million in Cella Energy Limited to establish a new facility at KSC.

SPACE FLORIDA, the Space Coast Energy Consortium, Brevard Workforce and the Technological Research and Development Association (TRDA) awarded $2.2 million in Federal grants to develop a clean energy hub in Central Florida.

NASA finalizes Cooperative Agreement with Florida-based CASIS to manage the International Space Station (ISS) U.S. National Laboratory

SPACE FLORIDA and TRDA partner to present the Igniting Innovation Showcase enabling 10 high-tech start-ups to present to national financers in Cape Canaveral, resulting in several partnerships to grow these businesses.

NOVEMBER 2011: Florida-based L2 Aerospace's Instant Eyes™ mini UAV technology receives *Popular Science* "Best Of What's New" honor.

SPACE FLORIDA and Lockheed Martin announce project to manufacture and test Marlin™ autonomous underwater vehicles (AUVs) at Riviera Beach site.

2012

MARCH 2012: Embraer announces new Engineering and Technology Center USA, bringing 200+ new engineering jobs with average salaries of $70,000.

APRIL 2012: CoreNet Global, a leading association of corporate real estate executives, presents **SPACE FLORIDA** with its 2012 Economic Development Leadership award for the Boeing Commercial Crew facility project at KSC.

CASIS and Nanoracks sign agreement to conduct commercial research on ISS.

HB 59 is signed into law by Gov. Scott that adds Cecil Field to the statutorily designated Florida Spaceport Territory

JUNE 2012: Craig Technologies signs a NASA Space Act Agreement for utilization of KSC equipment and facilities tied to the Space Shuttle program. **SPACE FLORIDA** and the Economic Development Commission of Florida's Space Coast to assist with marketing these capabilities to outside companies.

The Center for the Advancement of Science in Space (CASIS), the Florida-based manager of ISS utilization, announces its first Solicitation For Proposals: Advancing Protein Crystallization In Microgravity.

CASIS and The American Astronautical Society organize the 1st Annual ISS Research and Development Conference, fostering interest from industry in conducting cutting-edge research about the National Lab.

FOR MORE INFORMATION:
WWW.SPACEFLORIDA.GOV
321-730-5301

SPACE FLORIDA is enabling significant growth of the aerospace industry in Florida and continues to work hard to ensure our state remains a global leader in space and aerospace initiatives.

Institute for the Commercialization of Public Research

Igniting Florida's Innovation Economy

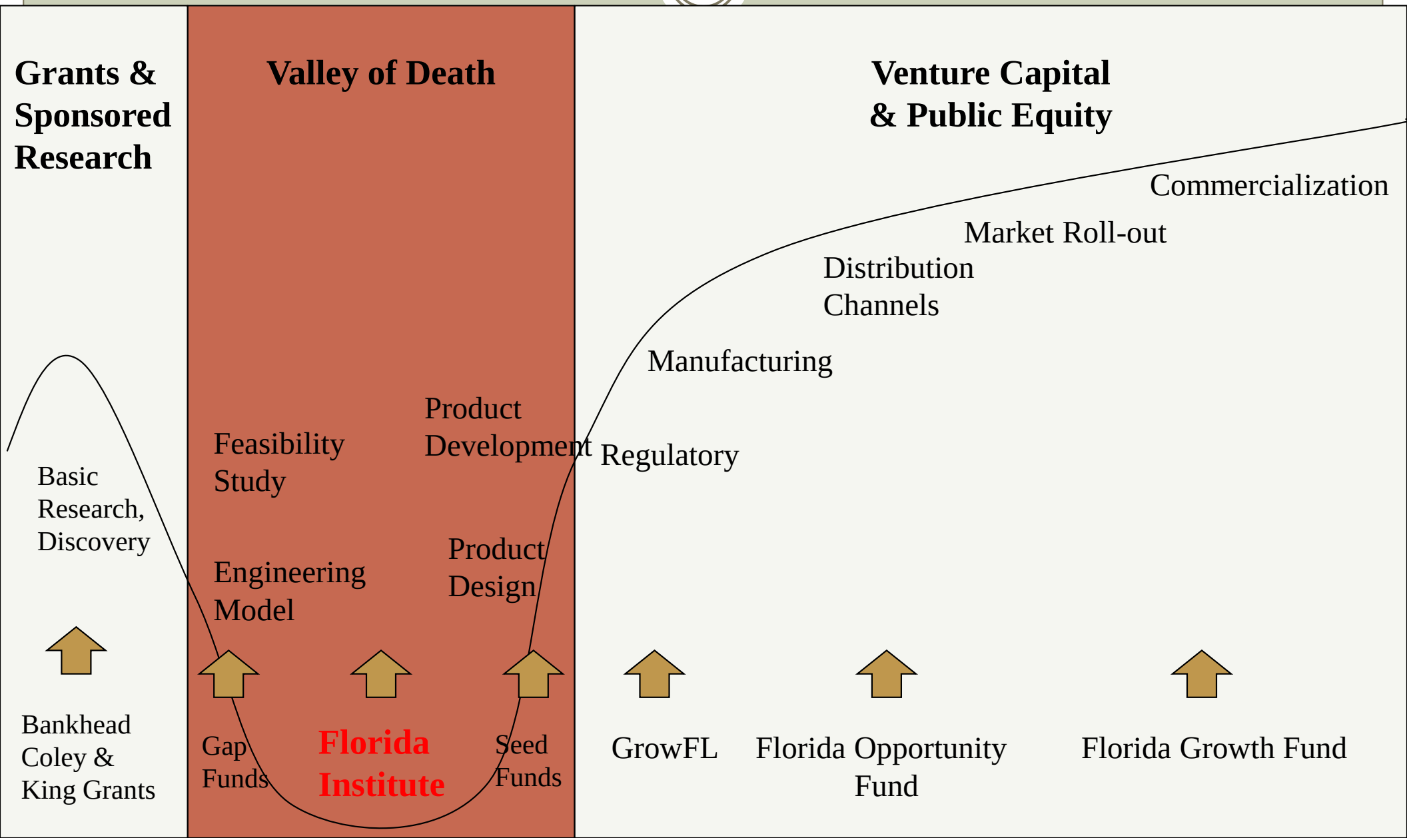
November 2012

www.florida-institute.com

Investing in Florida's Future

- Institute leverages statewide $2B research base to create new companies and jobs
- Supports 20+ universities and research institutions
- Company creation, building and funding programs
- 2011/12 appropriation ($10M) deployed as loans to startups; requires private investment match; funds expected to be fully committed by Spring 2013
- Competitive states' funds range between $50M - $500M (Texas deployed $370M+ and induced an additional $1.35B private capital)
- Institute program scalable to meet Florida demand

Where The Institute Fits



Program Status (11/30/12)

- $5.4M (63%) committed to 18 companies
- First $2.7M deployed to 9 companies induced ~$8M outside private investment
- Job creation underway: avg. annual salary per job: $74,000
- Yr. 5 estimated cost- per- job: under $3,000
- Over 95 new company opportunities identified statewide; pipeline of hundreds more; demand far exceeds funding supply

Connectivity to Private Investors

- 25-member Investor Advisory Board
  - Members from Northeast, Southeast, West Coast, Midwest
- Program underway to form regional angel investor networks
- Visibility for Florida companies in local, regional and national investor conferences
- Active engagement with seed and early-stage funds

Company Spotlight – Shadow Health

- Interactive, digital training for medical, nursing and allied health programs
- Enables students to engage in standardized, simulated clinical experiences
- Technology licensed from the University of Florida
- Funding through Institute Seed Capital Accelerator Program, over $1M private investment raised
- Product development and launch; office expansion and high-skill, high-wage job creation

Company Spotlight – KeriCure

- Natural topical wound care product that decreases healing time and scarring
- Products provide treatment for both humans and animals
- Technology licensed from the University of South Florida, woman owned business
- Strong mentoring team developed to increase company success
- ~$1.3M in Federal funding, approved for Institute Seed Capital Accelerator Program; over $300,000 local private investment raised

Contact Information

www.florida-institute.com

561-368-8889

Commerce and Tourism Committee –

Some Related Websites

Department of Economic Opportunity	http://floridajobs.org/
- Unemployment Rate - Employment Data - Minimum Wage	http://floridajobs.org/labor-market-information/labor-market-information-press-releases/latest-statistics
- Office of Film and Entertainment	http://www.filminflorida.com/
Workforce Florida, Inc.	http://www.workforceflorida.com/
- Regional Workforce Boards and One-Stop Centers	http://www.workforceflorida.com/ResourcesLinks/RegionalWorkforceBoards/RWBMap.php
- Employ Florida (state job database)	https://www.employflorida.com/vosnet/Default.aspx
Enterprise Florida, Inc.	http://www.eflorida.com/
- Visit Florida	http://www.visitflorida.com/
- Florida Sports Foundation	http://www.flasports.com/
- Institute for the Commercialization of Public Research	http://florida-institute.com/
- Florida Opportunity Fund	http://floridaopportunityfund.com/
- Florida Development Finance Corporation	http://www.eflorida.com/Why_Florida.aspx?id=7116#.ULaA1me3NGQ
Space Florida	http://www.spaceflorida.gov/
Department of Agriculture and Consumer Services	
- Division of Consumer Services	http://www.800helpfla.com/
- Division of Licensing	http://licgweb.doacs.state.fl.us/
Department of State	
- Division of Corporations	http://sunbiz.org/
- Notaries	http://notaries.dos.state.fl.us/
Florida Export Finance Corporation	http://www.dos.state.fl.us/fefc/
Florida Small Business Development Center Network	http://floridasbdc.org/main.php
Florida Growth Fund	http://floridagrowthfund.com/
Florida Ports Council	http://flaports.org/Default.aspx

CourtSmart Tag Report

Room: SB 401 **Case:** **Type:**
Caption: Senate Commerce & Tourism Com. **Judge:**

Started: 12/4/2012 9:02:19 AM
Ends: 12/4/2012 9:19:23 AM Length: 00:17:05

Opening remarks by Chair Detert.
Each member of the committee introduced themselves.
Jennifer explained materials in packet.
Senator Hukill moves we rise.