



Economic Development Advisory Board Regular Meeting

February 11, 2019 at 8:15 a.m.

City Hall | Chapman Room
401 S. Park Ave. | Winter Park, Florida

Agenda Items

1. Opening comments

2. Approval

- A. Minutes for December 10, 2019

3. New business

- A. Discussion on Building Code and Permitting
- B. Employment Analysis
- C. Non-Taxable Property Analysis
- D. Chamber Update

4. Adjourn

Next meeting: March 10

appeals & assistance

“If a person decides to appeal any decision made by the Board with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based.” (F.S. 286.0105).

“Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk’s Office (407-599-3277) at least 48 hours in advance of the meeting.”



Economic Development Advisory Board Agenda Item

February 11, 2019 at 8:15 am

City Hall | Chapman Room
401 S. Park Ave. | Winter Park, Florida

Agenda Item

Approve Minutes for December 10, 2019.

Motion | Recommendation

Motion to approve minutes from December 10, 2019.

Background

N/A



Economic Develop Advisory Board Minutes

December 10, 2019 at 8:15 a.m.

Chapman Room
401 S. Park Ave. | Winter Park, Florida

Present

Bill Segal, Michelle Heatherly, Joel Roberts, Sheila DeCiccio, Wes Naylor, and Betsy Gardner-Eckbert (8:23 a.m.)

Commissioner Weaver, Kyle Dudgeon, Peter Moore, Laura Halsey, Lindsey Hayes

Absent

Tara Tedrow, Mike Miller

Meeting called to order

Meeting was called to order at 8:19 am.

Approval of minutes

Motion made by Sheila DeCiccio, seconded by Michelle Heatherly, to approve the November 12, 2019 minutes. Motion passes 5-0.

New Business

1. Economic Development Plan Update

Assistant Division Director, Kyle Dudgeon, provided a powerpoint presentation to support the Economic Development update discussion. Economic Development reporting, cluster study, real estate review and assessments, and coordination and partnership were the four topics discussed. Mr. Dudgeon provided some additional details on taxable vs non-taxable properties. A color-coded layout of the non-taxable properties provided a visual aid for the discussion. Staff will pull additional details pertaining to large non-taxable institutions to provide to the Board at the next meeting.

2. EDAB 2020 Meeting Schedule

Mr. Dudgeon informed the Board that he will be sending out new 2020 outlook calendar invites for the EDAB.

3. Chamber Update

Betsy Gardner-Eckbert, Chamber of Commerce President, thanked staff for the 'Winter on the Avenue' events. She discussed the Chamber's four main focal points: Great experience for visitors and residents, program delivery, welcoming guests whether domestic or international, and advocacy.

Mr. Roberts stated he would like to encourage the Board to add an objective for 2020 that would help businesses. Mrs. Gardner-Eckbert added that businesses do face obstacles when it comes to enhancing their business. She suggested staff walk the board members through some city process so they could review and offer suggestions to the Commission that would help businesses succeed. The goal would be to identify dysfunctions issues that are unintentional but may be proven to be cumbersome. Mrs. Gardner-Eckbert will coordinate with staff.

Mr. Segel inquired if the Board has a mission statement, staff will provide the board with a copy of that mission statement.

Commissioner Weaver thanked the board for serving and stated the meetings are always informative and he enjoys attending.

Mrs. DeCiccio inquired about the Swoope lot and the plans for future use. Staff spoke with the property owner and informed the Board that staff has had conversations about the best use of the property. The property is currently in the process of re-appraisal before staff brings information forward to the Commission.

There being no further business, the meeting adjourned at 9:11 a.m.

Chairperson, Bill Segel

Board Liaison, Laura Halsey



Economic Development Advisory Board Agenda Item

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Agenda Item

Discussion on Building Code and Permitting

Motion | Recommendation

N/A

Background

At the last EDAB meeting, the board requested a review of topical processes and subject matter related to Economic Development. The first will be on building code and permitting. Discussion at this topic will be accompanied by city staff from these departments.



Economic Development Advisory Board Agenda Item

February 11, 2020 at 8:15 am

City Hall | Chapman Room
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Agenda Item

Winter Park Employment Analysis

Motion | Recommendation

Background

In 2009 EDAB and staff participated in a business cluster study to determine which industries were concentrated within Winter Park at that time. This is also defined as a location quotient (LQ) exercise. The study determined a higher concentration of businesses with six different backgrounds. These included:

Education and Knowledge Creation
Real Estate and Development
Arts and Culture
Health Care Services
Financial and Professional Services
Creative Services

In 2016, EDAB and staff again participated in the exercise to determine trend spotting and begin to develop longitudinal data over time. The study found that the six different clusters from the 2009 analysis were still higher than the region. It did however suggest a negative compound annual growth rate (CAGR) in the real estate and development, financial and professional services, and creative services areas. This suggests that while there is still a concentration of jobs in these fields locally, there is a lower rate of return or market share when compared to the regional or national scale. Additional conclusions of the report are as follows:

- Winter Park's jobs per 100 capita is twice that of the nation
- Of non-residential new development, Office/professional and lodging presented the highest market value per land area (SF)
- Vacant and potential new growth may accommodate additional cluster industries and jobs

In 2020, staff worked with a consultant to continue the monitoring of LQ's within the city. Target industry clusters continue to remain at high LQ levels, but suggest a flattening out of their intensity. A similar result to the 2016 analysis. This is possibly due to the overall effects of growth in the region as a whole. LQ's however do not measure job growth in this way. This is instead completed through a shift-share analysis, which is reviewed later in the report.

BENCHMARKING:

The report also uses other cities as reference points or 'benchmarks' to help determine growth locally against the region. These other communities are Maitland, Casselberry, and Winter Garden. Page 4 beings this review with considerations on employment overview. Theoretically compared to the United States as a 'balanced economy', the chart shows that Winter Park is a net exporter of jobs. One possible conclusion for this is people are choosing to live in Winter Park and commute to other locations rather than living close to where they work.

LQ's within the 2020 report continue the narrative of job growth in target industry clusters except creative services. The value for this industry however still states a higher than normal concentration when compared to the region.

Page 9 begins a review of top employment sectors and concentrations through their market share. Some observations are as follows:

- Winter Park, Casselberry, and Winter Garden all have a significant share in NAICS code 72251 (Restaurants and Other Eating Places). However it is likely the types of businesses under this category are not comparable.
- Nine of the top ten employment sectors through this study for Winter Park are in health care, professional services, or food accommodation.

The report concludes with a shift-share analysis. The purpose of this technique helps identify which industries are growing because of the local economy as opposed to overall national trends or regional competitiveness. The report once again identifies health care, professional services, and hospitality as sectors that have grown significantly due to the local environment.



gai consultants

COMMUNITY
SOLUTIONS
GROUP

A black and white photograph of a historic building with a large tree in front. The building has several windows with striped awnings. A sign in front of the building reads "Hotel Plaza". The image is partially obscured by a large teal and light green geometric shape in the foreground.

EMPLOYMENT ANALYSIS

City of Winter Park,
January 2020

Employment Overview

Employment Market

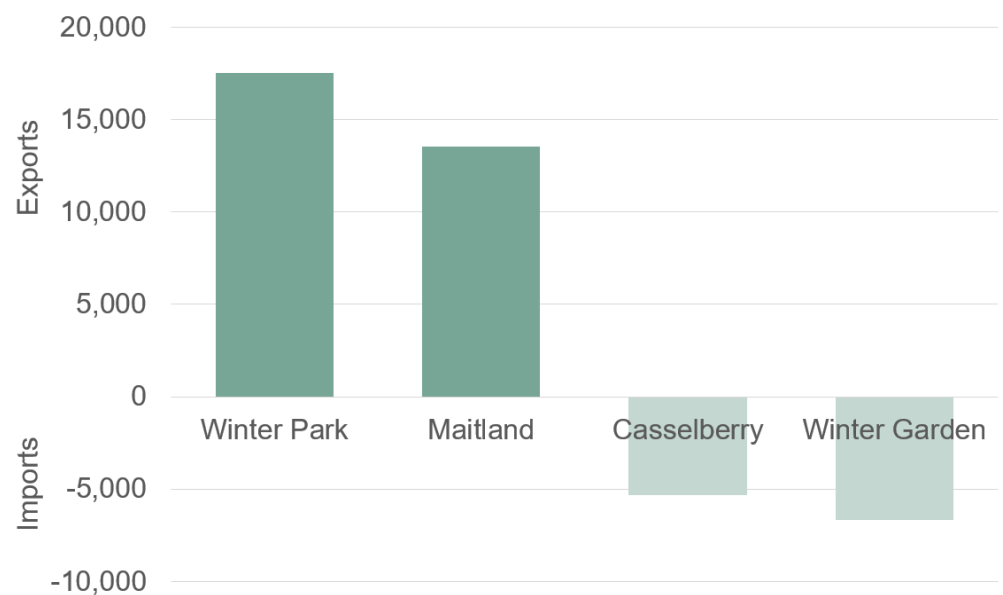
Creating more basic industry (jobs in excess of local demand), by definition, creates a positive flow of activity into a local economy. Whether that economic activity creates wealth that remains in the local area is a more complicated issue. However, the excess of

employment above local demand is a strong indicator of more opportunity for employment and higher levels of wealth tied to the resources residing in the local area.

| | Population (000s) | Employment (000s) | Jobs per 100 capita |
|---------------|-------------------|-------------------|---------------------|
| United States | 323,071 | 140,129 | 43.4 |
| Winter Park | 30.1 | 30.6 | 101.6 |
| Maitland | 17.7 | 21.3 | 119.8 |
| Casselberry | 27.2 | 6.5 | 23.8 |
| Winter Garden | 42.6 | 11.8 | 27.7 |

Sources: U.S. Census Bureau; GAI Consultants.

Export and Import Employment



Target Clusters

Education and Knowledge

(Employment > 25)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--|---------|---------|
| 61131 | Colleges, Universities, and Professional Schools | 3.30 | 2.94 |
| 61111 | Elementary and Secondary Schools | 0.93 | 1.22 |
| 61121 | Junior Colleges | 1.76 | 4.75 |
| 61162 | Sports and Recreation Instruction | 1.10 | 1.90 |
| 51912 | Libraries and Archives | 5.32 | 6.05 |

Real Estate Development

(Employment > 200)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--|---------|---------|
| 23622 | Commercial and Institutional Building Construction | 1.00 | 5.22 |
| 54133 | Engineering Services | 2.09 | 2.35 |
| 23611 | Residential Building Construction | 1.41 | 2.14 |
| 23821 | Electrical Contractors and Other Wiring Installation Contractors | 2.44 | 1.46 |
| 23822 | Plumbing, Heating, and Air-Conditioning Contractors | 0.45 | 1.16 |
| 53121 | Offices of Real Estate Agents and Brokers | 3.36 | 3.67 |

Arts, Culture, and Entertainment

(Employment > 10)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--|---------|---------|
| 71211 | Museums | 2.25 | 2.35 |
| 45114 | Musical Instrument and Supplies Stores | 5.02 | 5.15 |
| 71151 | Independent Artists, Writers, and Performers | 2.54 | 2.86 |
| 45392 | Art Dealers | 4.52 | 5.66 |
| 72251 | Restaurants | 1.70 | 1.51 |
| 72231 | Food Service Contractors | 0.70 | 4.18 |

Healthcare Services

(Employment > 175)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--|---------|---------|
| 62211 | General Medical and Surgical Hospitals | 1.03 | 1.04 |
| 62161 | Home Health Care Services | 1.27 | 3.64 |
| 62111 | Offices of Physicians | 1.63 | 1.73 |
| 62121 | Offices of Dentists | 1.44 | 1.10 |
| 62412 | Services for the Elderly and Persons with Disabilities | - | 0.99 |

Financial and Professional

(Employment > 200)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--|---------|---------|
| 54111 | Offices of Lawyers | 3.80 | 3.49 |
| 55111 | Management of Companies and Enterprises | 1.64 | 0.98 |
| 54121 | Accounting, Tax Preparation, Bookkeeping, & Payroll Services | 1.47 | 2.44 |
| 52211 | Commercial Banking | 1.34 | 1.40 |
| 54161 | Management Consulting Services | 1.79 | 1.73 |
| 52312 | Securities Brokerage | 3.01 | 3.79 |

Creative Services

(Employment > 75)

| NAICS | Industry | 2009 LQ | 2016 LQ |
|-------|--------------------------|---------|---------|
| 51112 | Periodical Publishers | 11.73 | 19.88 |
| 54181 | Advertising Agencies | 1.55 | 3.72 |
| 51512 | Television Broadcasting | 6.35 | 6.51 |
| 54141 | Interior Design Services | 21.99 | 18.46 |
| 54131 | Architectural Services | 8.25 | 2.53 |

Benchmarking

In the context of economic analysis, making comparisons between and among groups or entities (“benchmarking”) allows for specific inferences or potential conclusions to be drawn from individual metrics. Benchmarking does not require that groups or entities are identical in every aspect or on every dimension, but only one or two specific attributes. In fact, the many potential differences among groups or entities that share something in common is a main contributor to the process of making inferences or drawing conclusions. The main challenge with selecting “comparable” locations for this type of economic analysis is a result of the many qualitative perceptions that make locations more or less alike. Based on past experience, we initially identify locations using quantitative metrics to include land area, population, density, and population growth.

There are more than 410 cities, towns, and villages in the State of Florida. The vast majority of these local jurisdictions, as expected, represent smaller areas. Only 2.2% or 9 cities in the state have a land area greater than 75 square miles. More than 71% or 292 cities, towns, and villages have land area of less than 10 square miles.

| Municipality | 2018 Population | Area (Sq. Mi.) | Gross Density | 2018-10 Growth |
|----------------------------|-----------------|----------------|---------------|----------------|
| Winter Park | 31,059 | 10.17 | 3,054 | 12.1% |
| Maitland ¹ | 28,876 | 7.47 | 3,866 | 10.6% |
| Casselberry ² | 17,947 | 6.42 | 2,795 | 13.1% |
| Winter Garden ¹ | 45,266 | 17.87 | 2,533 | 30.2% |

Sources: U.S. Census Bureau; GAI Consultants Notes: (1) Selected by Geography, (2) Selected for Area or Density, Gross Density is measured as 2018 Total Population per square mile.

As we mentioned, it is not required that groups or entities are identical in every aspect or on every dimension. For example, higher population levels, larger land area, and faster population growth compared with Winter Park would potentially explain any observed differences as part of our analysis.

Winter Park Top Employment Sectors

| NAICS | Industry | Share | 2016 LQ |
|-------|--|-------|---------|
| 72251 | Restaurants and Other Eating Places | 12.5% | 1.51 |
| 62211 | General Medical and Surgical Hospitals | 4.4% | 1.04 |
| 61131 | Colleges, Universities, and Professional Schools | 4.4% | 2.94 |
| 62161 | Home Health Care Services | 4.1% | 3.64 |
| 62111 | Offices of Physicians | 3.5% | 1.73 |
| 54111 | Offices of Lawyers | 2.9% | 3.49 |
| 56161 | Investigation, Guard, and Armored Car Services | 2.8% | 4.48 |
| 55111 | Management of Companies and Enterprises | 2.6% | 0.98 |
| 54121 | Accounting, Tax Preparation, Bookkeeping, and Payroll Services | 2.4% | 2.44 |
| 23622 | Commercial and Institutional Building Construction | 2.3% | 5.22 |

Top Concentrations (Employment > 100)

| NAICS | Industry | 2016 LQ |
|-------|--|---------|
| 61141 | Business and Secretarial Schools | 21.30 |
| 51112 | Periodical Publishers | 19.88 |
| 54141 | Interior Design Services | 18.46 |
| 54132 | Landscape Architectural Services | 13.47 |
| 42412 | Stationery and Office Supplies Merchant Wholesalers | 11.86 |
| 54193 | Translation and Interpretation Services | 11.33 |
| 44121 | Recreational Vehicle Dealers | 8.16 |
| 33461 | Manufacturing and Reproducing Magnetic and Optical Media | 8.09 |
| 51512 | Television Broadcasting | 6.51 |
| 51912 | Libraries and Archives | 6.05 |

Maitland Top Employment Sectors

| NAICS | Industry | Share | 2016 LQ |
|-------|--|-------|---------|
| 55111 | Management of Companies and Enterprises | 6.9% | 2.59 |
| 52412 | Direct Insurance (except Life, Health, and Medical) Carriers | 6.8% | 13.79 |
| 62111 | Offices of Physicians | 4.2% | 2.08 |
| 23611 | Residential Building Construction | 4.1% | 7.77 |
| 54121 | Accounting, Tax Preparation, Bookkeeping, and Payroll Services | 3.7% | 3.78 |
| 54111 | Offices of Lawyers | 3.2% | 3.84 |
| 56132 | Temporary Help Services | 3.0% | 1.11 |
| 51711 | Wired Telecommunications Carriers | 3.0% | 5.04 |
| 62161 | Home Health Care Services | 2.8% | 2.50 |
| 56111 | Office Administrative Services | 2.8% | 7.75 |

Top Concentrations (Employment > 100)

| NAICS | Industry | 2016 LQ |
|-------|---|---------|
| 52239 | Other Activities Related to Credit Intermediation | 33.43 |
| 53132 | Offices of Real Estate Appraisers | 26.30 |
| 52412 | Direct Insurance (except Life, Health, and Medical) Carriers | 13.79 |
| 42373 | Warm Air Heating, Air-Conditioning Equipment, and Supplies Merchant Wholesalers | 13.21 |
| 52232 | Financial Transactions Processing, Reserve, and Clearinghouse Activities | 13.05 |
| 54119 | Other Legal Services | 12.66 |
| 62133 | Offices of Mental Health Practitioners (except Physicians) | 10.42 |
| 51511 | Radio Broadcasting | 10.18 |
| 42342 | Office Equipment Merchant Wholesalers | 9.86 |
| 71151 | Independent Artists, Writers, and Performers | 8.63 |

Casselberry Top Employment Sectors

| NAICS | Industry | Share | 2016 LQ |
|-------|--|-------|---------|
| 72251 | Restaurants and Other Eating Places | 12.6% | 1.52 |
| 56132 | Temporary Help Services | 5.2% | 1.90 |
| 44511 | Supermarkets and Other Grocery (except Convenience) Stores | 4.9% | 2.30 |
| 45291 | Warehouse Clubs and Supercenters | 4.3% | 3.48 |
| 23822 | Plumbing, Heating, and Air-Conditioning Contractors | 2.8% | 3.51 |
| 23899 | All Other Specialty Trade Contractors | 2.4% | 12.32 |
| 42361 | Electrical Apparatus and Equipment, and Wiring Supplies | 2.0% | 12.31 |
| 44411 | Home Centers | 2.0% | 3.50 |
| 45211 | Department Stores | 2.0% | 2.60 |
| 56173 | Landscaping Services | 2.0% | 3.91 |

Top Concentrations (Employment > 100)

| NAICS | Industry | 2016 LQ |
|-------|---|---------|
| 45439 | Other Direct Selling Establishments | 18.81 |
| 23899 | All Other Specialty Trade Contractors | 12.32 |
| 42361 | Electrical Apparatus and Equipment, and Wiring Supplies | 12.31 |
| 72241 | Drinking Places (Alcoholic Beverages) | 5.72 |
| 56173 | Landscaping Services | 3.91 |
| 23822 | Plumbing, Heating, and Air-Conditioning Contractors | 3.51 |
| 44411 | Home Centers | 3.50 |
| 45291 | Warehouse Clubs and Supercenters | 3.48 |
| 44814 | Family Clothing Stores | 3.10 |
| 45211 | Department Stores | 2.60 |

Winter Garden Top Employment Sectors

| NAICS | Industry | Share | 2016 LQ |
|-------|--|-------|---------|
| 72251 | Restaurants and Other Eating Places | 12.6% | 1.53 |
| 44511 | Supermarkets and Other Grocery (except Convenience) Stores | 3.2% | 1.49 |
| 42311 | Automobile and Other Motor Vehicle Merchant Wholesalers | 2.4% | 25.01 |
| 62311 | Nursing Care Facilities (Skilled Nursing Facilities) | 2.4% | 1.84 |
| 44814 | Family Clothing Stores | 2.4% | 4.07 |
| 23822 | Plumbing, Heating, and Air-Conditioning Contractors | 2.2% | 2.80 |
| 45291 | Warehouse Clubs and Supercenters | 2.1% | 1.74 |
| 44711 | Gasoline Stations with Convenience Stores | 2.0% | 3.15 |
| 23811 | Poured Concrete Foundation and Structure Contractors | 1.7% | 9.65 |
| 23891 | Site Preparation Contractors | 1.4% | 5.56 |

Top Concentrations (Employment > 100)

| NAICS | Industry | 2016 LQ |
|-------|--|---------|
| 42444 | Poultry and Poultry Product Merchant Wholesales | 121.02 |
| 44121 | Recreational Vehicle Dealers | 33.14 |
| 32612 | Plastics Pipe, Pipe Fitting, and Unlaminated Profile Shape Manufacturing | 29.05 |
| 42311 | Automobile and Other Motor Vehicle Merchant Wholesalers | 25.01 |
| 42451 | Grain and Field Bean Merchant Wholesalers | 24.20 |
| 56179 | Other Services to Buildings and Dwellings | 20.46 |
| 31141 | Frozen Food Manufacturing | 14.51 |
| 23811 | Poured Concrete Foundation and Structure Contractors | 9.65 |
| 23711 | Water and Sewer Line and Related Structures Construction | 8.64 |
| 56199 | All Other Support Services | 8.26 |

Shift-Share Analysis

A shift-share analysis, used in regional science, political economy, and urban studies, determines what portions of regional economic growth or decline can be attributed to national, economic industry, and regional factors. The analysis helps identify industries where a regional economy has competitive advantages over the larger economy. A shift-share analysis takes the change over time of an economic variable, such as employment, within industries of a regional economy, and divides that change into various components. A traditional shift-share analysis splits regional changes into just three components, but other models have evolved that expand the decomposition into additional components.

The traditional form of the shift-share analysis was developed by Daniel Creamer in the early 1940s, and was later formalized by Edgar S. Dunn in 1960. Also known as the comparative static model, it examines changes in the economic variable between two years. Changes are calculated for each industry in the analysis, both regionally and nationally. Each regional change is decomposed into three components.

1

National growth (“NG”) effect is the portion of the change attributed to the total growth of the national economy. It equals the theoretical change in the regional variable had it increased by the same percentage as the national economy.

2

Industry mix (“IM”) effect is the portion of the change attributed to the performance of the specific economic industry. It equals the theoretical change in the regional variable had it increased by the same percentage as the industry nationwide, minus the national growth effect.

3

Local share (“LS”) effect is the portion of the change attributed to regional influences, and is the component of primary concern to regional analysts. It equals the actual change in the regional variable, minus the previous two effects.

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Economic Development Advisory Board Agenda Item

February 11, 2020 at 8:15 am

City Hall | Chapman Room
401 S. Park Ave. | Winter Park, Florida

Agenda Item

Non-Taxable Property Analysis

Motion | Recommendation

N/A

Background

Direction to staff was to provide additional information regarding the board's discussions on nontaxable property. This included an analysis of all municipalities within Orange County and a comparison of completely exempt parcels. Staff will provide ~~DSB~~ this item at the meeting.



Economic Development Advisory Board Agenda Item

February 11, 2019 at 8:15 am

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Agenda Item

Chamber Update

Motion | Recommendation

N/A

Background

Update to be given by the Chamber of Commerce.