



Indian River County Purchasing Division

1800 27th Street, B1-303

Vero Beach, FL 32960

Phone (772) 226-1416

Request for Proposals

Project Name: Economic Development Strategic Action Plan (EDSAP)

RFP #: 2024059

RFP Opening Date: **Thursday, August 1, 2024**

RFP Opening Time: **2:00 P.M.**

All Proposals must be received by the Purchasing Division, 1800 27th Street, Vero Beach, Florida 32960 prior to the date and time shown above. Late responses will be not be accepted or considered.

The following must be received prior to the RFP Opening Date and Time Above:

1	Marked Original Copy, with all forms signed (and notarized, if required)
4	Printed Copies for Committee
1	Single PDF file of entire submittal (including all forms and price proposal) by email or dropbox/filesshare link emailed to purchasing@indianriver.gov . USB/CD copies are <u>not</u> acceptable, due to our IT security procedures. Emailed acknowledgments will be sent, but <u>Proposers are responsible for confirming receipt of the electronic copy, prior to the due date and time.</u>

Initial screening, ranking, final ranking and negotiations will be in accordance with the criteria specified within this solicitation. The Board of County Commissioners reserves the right to accept or reject any and all submittals and to waive any and all informalities.

Refer All Questions to:

Email: purchasing@indianriver.gov

Scope of Services

1. INTRODUCTION

Indian River County invites qualified consultants/firms to submit proposals for the development of an Economic Development Strategic Action Plan (EDSAP). The EDSAP aims to enhance economic growth, attract investments, retain businesses, and foster employment opportunities within the county. The most recently completed plan is provided as an appendix to this RFP.

2. PROJECT SCOPE

The selected consultant/firm shall undertake the following tasks:

- Review past Economic Development Strategic Action Plans and associated documentation.
- Update and analyze relevant data for the region, county, and opportunity zones.
- Collaborate with local municipalities and the Chamber of Commerce to gather comprehensive data and insights.
- Identify key investment areas and redevelopment zones.
- Develop short-term (1-3 years), mid-term (3-6 years), and long-term (6-10 years) goals aligned with economic development objectives.
- Focus on strategies for industry attraction, business retention, incentive programs, housing initiatives, and employment opportunities.
- Provide actionable recommendations and implementation strategies.
- Present the EDSAP to stakeholders for feedback and revisions.

3. DELIVERABLES

The consultant/firm shall deliver:

- Updated data analysis reports.
- Short, mid-term, and long-term goals.
- Comprehensive investment and redevelopment area maps.
- Presentation materials for stakeholder engagement.
- Draft and final versions of the EDSAP.
- One-page summary reference document.
- Dedicated website for project information and public input.
- Three public engagement meetings across the county.

4. TIMELINE

The project duration shall not exceed 11 months. A detailed project schedule with key milestones and deliverable deadlines is required. Use a start date of October 1, 2024 for the project schedule.

Submittal Instructions

Information to Be Submitted: All printed and electronic submittals must be received, as instructed on the first page of this RFP, prior to the opening date and time. Submittals must include and are requested to be organized as follows:

- a. One-page cover letter (if desired)
- b. Firm Information form
- c. Company profile highlighting relevant experience
- d. Description of methodologies for data analysis and goal formulation.
- e. Detailed project schedule, including key milestones, with a commencement date of October 1, 2024.
- f. References (form provided) completed by other organizations and agencies
- g. Samples (descriptions, reports and results) of previous similar projects.
- h. Proposed project team with availability and anticipated percentage of the work to be assigned to each team member. Resumes shall be no more than two pages (one sheet, if double-sided). Please do not submit information on individuals who will not actively participate in our plan.
- i. Budget breakdown, including deliverables, and total project cost.
- j. Sworn statement on Disclosure of Relationships as per Section 105.08 of the Indian River County Code.
- k. Certification Regarding Prohibition Against Contracting with Scrutinized Companies
- l. County's Sample agreement with any requested changes indicated in track changes, or a statement that "no changes to the sample agreement are requested."

There is no page limit, however, please consider the committee's limited time and the need for Proposals to be concise. Images of licenses and certifications are not desired. Please provide only information relevant to the requested services, and please double-side where possible. A single page cover letter may be included, but is not requested or required.

Proposals should not be marked "confidential", "trade secret" or the like. Any information submitted that is exempt from disclosure, in accordance with Florida Statute, MUST be submitted in a separately sealed envelope, and include the reference in statute that authorizes the County to withhold that specific information from public record requests. The County reserves the right to not consider Proposals containing excessive exempt material, at the County's sole interpretation. This includes submittals summarily marked as exempt, confidential, or the like.

Method of Selection: The County shall convene a Selection Committee of which the responsibility shall be as follows:

- a. Independently review and evaluate each Submittal
 1. Each Committee member shall evaluate each firm by assigning a number of points for each criterion, as established in the solicitation, and then totaling the number of points for all criteria.
 2. Each Committee member shall then rank the firms on the basis of the total number of points received for all criteria, with the firm receiving the most points being ranked # 1.
- b. As a "Committee of the whole", develop a combined ranking order of all Submittals meeting minimum qualifications. The ranking of firms shall be done in the following manner:
 1. The rankings received by each firm from all Committee members shall be totaled and divided by the number of Committee members, to produce an average ranking.
 2. The firm receiving the lowest average ranking (i.e. closest to # 1) shall be ranked the # 1 firm, and the process repeated until all firms have been ranked according to their average ranking.

3. In the event of a tie, the ranking of tied firms shall be determined by a comparison of the total number of points received by each firm from all Committee members. The firm with the highest number of points will be awarded the higher ranking position.
 4. The Committee may subsequently discuss the rankings and their reasons behind them, and each member may modify their ranking of firms accordingly until the Committee is satisfied with the rankings. No rescoring of points is required.
 5. After interviews (if interviews are held in an RFP process), and based upon information learned during the interviews, each Committee member will rank the firms in order of preference and a consolidated final Committee ranking established.
- c. The County may, solely at its own option, seek additional Submittals with this or a similar Submittal in the event the County, solely at its own option, determines that the quantity and/or quality of Submittals received is insufficient to meet the County's needs and/or that award of a contract arising from this RFP would not be in the public interest.
 - d. The Committee shall forward its recommendations in accordance with the ranking to the Indian River County Board of County Commissioners, which shall, at its sole option, authorize negotiations of a contract pursuant to the requirements of Florida law, or make award directly to the top ranked proposer.
 - e. The Indian River County Board of County Commissioners possesses sole authority to award a contract for the services sought herein.

Criteria for Award:

EVALUATION CRITERIA	EVALUATION POINTS MAXIMUM
1. Firm's experience in economic development planning	25
2. Methodology for data analysis, goal formulation, and project schedule	20
3. References and evidence of success in previous projects	25
4. Qualifications and Availability of the Project Team	20
5. Cost-effectiveness and practicality of the proposed budget	10
TOTAL	100

Anticipated Timeline

Event	Date	
Advertise for Proposals	Monday, July 8, 2024	
Deadline for receipt of Questions	July 22, 2024	
Proposals Due before 2:00 p.m. on	Thursday, August 1, 2024	
Initial Selection Committee Meeting	Week of August 12, 2024	
Interviews (if held)	Week of August 26, 2024	
	If no additional negotiations are necessary	If negotiation of terms, scope, and/or cost are necessary
Recommendation of Award and agreement presented to BCC	September 10, 2024	
Final ranking and authorization to negotiate requested of BCC		September 10, 2024
Final agreement approved	September 10, 2024	October 8, 2024
Agreements executed and work begins	September 23, 2024	October 28, 2024
Project completed	August 2025	September 2025

General Instructions

Cone of Silence. Potential respondents and their agents must not communicate in any way with the Board of Commissioners, County Administrator, any County staff, other than Purchasing personnel, members of the Economic Development Council, or employees of the Chamber of Commerce in reference or relation to this solicitation. This restriction is effective from the time of solicitation advertisement until the Board of County Commissioners meets to authorize award. Such communication may result in disqualification.

Sealed Submittals and Envelope Markings: All responses shall be submitted in a sealed envelope or box. The outside of the envelope shall be clearly marked with the Consultant's Name and Return Address, Proposal #, Title, Date of opening, and Time of Opening.

Opening Location: Responses must be received by the Purchasing Division at 1800 27th Street, Vero Beach, FL 32960, on or before the closing hour and date listed in the Request for Proposals. Proposals submitted after the stated time and date will not be accepted or considered.

Public Record Exemption: Correspondence, materials, and documents received pursuant to this solicitation become public records subject to the provisions of Chapter 119, Florida Statutes. Should the proposer assert any exemptions to the requirements of Chapter 119, Florida Statutes, and related statutes, the burden of establishing such exemption, by the way of injunctive or other relief as provided by law, shall be upon the Proposer. To the extent records are redacted as requested by the Proposer in response to a public records request submitted to the County, Proposer shall indemnify and defend the County in any related litigation.

Taxes: Indian River County is exempt from any taxes imposed by State and / or Federal Government. Exemption Certificates, if required, are to be furnished by the successful Consultant and will be filled out by the County.

Indemnification: The Consultant shall defend, indemnify and hold harmless the County and its commissioners, officers, employees and agents, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorney's fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the design professional and other persons employed or utilized by the design professional in the performance of the contract.

Public Access: The Consultant shall comply with Florida's Public Records Law in accordance with the provisions of Chapter 119, Florida Statutes. Specifically, the Consultant shall keep and maintain public records that ordinarily and necessarily would be required by the County in order to perform the service. The Consultant shall provide the public with access to public records on the same terms and conditions that the County would provide the records at a cost that does not exceed the costs provided in Chapter 119 or as otherwise provided by law. The Consultant shall ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law. The Consultant shall meet all requirements for retaining public records and transfer, at no cost, to the County, all public records in possession of the Consultant upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the County in a format that is compatible with the information technology systems of the County.

Public Entity Crimes: Pursuant to Florida Statutes Section 287.133(2)(a), all Consultants are hereby notified that a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity (defined as the State of Florida, any of its departments or agencies, or any political subdivision); may not submit

a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Florida Statutes Section 287.017 for CATEGORY TWO [currently \$35,000] for a period of 36 months from the date of being placed on the convicted vendor list. A "public entity crime" means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

Suspension and Debarment: Indian River County will not make award to parties listed on the government-wide exclusions in the System for Award Management (SAM). The Consultant agrees to comply with the requirements of 2 C.F.R. pt. 180, subpart C and 2 C.F.R. pt. 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer. The Consultant further agrees to include a provision requiring such compliance in its lower tier covered transactions.

Scrutinized Companies Lists: The Consultant certifies that it and those related entities of respondent as defined by Florida law are not on the Scrutinized Companies that Boycott Israel List, created pursuant to s. 215.4725 of the Florida Statutes, and are not engaged in a boycott of Israel. In addition, if this agreement is for goods or services of one million dollars or more, Contractor certifies that it and those related entities of respondent as defined by Florida law are not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Section 215.473 of the Florida Statutes and are not engaged in business operations in Cuba or Syria. The County may terminate this Contract if Company is found to have submitted a false certification as provided under section 287.135(5), Florida Statutes, been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or been engaged in business operations in Cuba or Syria, as defined by section 287.135, Florida Statutes. County may terminate this Contract if Company, including all wholly owned subsidiaries, majority-owned subsidiaries, and parent companies, that exist for the purpose of making profit, is found to have been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel as set forth in section 215.4725, Florida Statutes.

Accordingly, firms responding to this solicitation shall return with their response an executed copy of the attached "Certification Regarding Prohibition Against Contracting With Scrutinized Companies." Failure to return this executed form with submitted bid/proposal/statement of qualifications will result in the response being deemed non-responsive and eliminated from consideration.

Non-Discrimination: Indian River County will not knowingly do business with vendors or contractors who discriminate on the basis of race, color or national origin, sex, sexual orientation, gender identity, age and/or disability. Through the course of providing services to the County, Contractors shall affirmatively comply with all applicable provisions of Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987 and the Florida Civil Rights Act of 1992, as well as all other applicable regulations, guidelines and standards. Any person who believes their rights have been violated should report such discrimination to the County's Title VI/Nondiscrimination Coordinator through the office of the County Attorney.

E-Verify: Proposer must be registered with and use, at their sole expense, the Department of Homeland Security's E-Verify system (www.e-verify.gov) to confirm the employment eligibility of all newly hired

employees, as required by Section 448.095, F.S. Owner, Proposer, and subcontractors may not enter into a contract unless each party to the contract registers with and uses the E-Verify system. Proposer is responsible for obtaining proof of E-Verify registration for all subcontractors in the form of an affidavit, as described in Section 448.095(5)(b) F.S. This requirement applies to any provider of services or goods.

Local Preference: Indian River County has no local ordinance or preferences, as set forth in section 255.0991(2), Florida Statutes, in place, therefore no preference prohibited by that section will be considered in the acceptance, review or award of this solicitation.

Prohibition Against Considering Social, Political or Ideological Interests in Government Contracting: Proposers are hereby notified of the provisions of section 287.05701, Florida Statutes, as amended, that the County will not request documentation of or consider a Consultant's social, political, or ideological interests when determining if the Consultant is responsible. Proposers are further notified that the County's governing body may not give preference to a Consultant based on the Consultant's social, political, or ideological interests. Proposers shall not provide any information relating to these interests in their submittal.

Regulations: It shall be the responsibility of the Consultant to assure compliance with any OSHA, EPA and / or other Federal or State of Florida rules, regulations, or other requirements, as each may apply.

Interpretations: All questions about the meaning or intent of the Request for Proposals are to be submitted to the Purchasing Division (purchasing@indianriver.gov) ten (10) or more days before the date fixed for opening of the RFP. Interpretations, modifications, responses, or clarifications considered necessary by County in reply to such questions will be issued by Addenda. Only questions answered or changes made by Addenda will be binding. Oral and other interpretations, modifications, or clarifications will be without legal effect. All such Addenda shall become part of the RFP documents.

Applicable Law and Venue: Contract(s) resulting from this RFP and all rights and duties of the parties hereto shall be governed by the laws of the State of Florida, including but not limited to the provisions of the Florida Uniform Commercial Code Chapters 671-679 F.S., for any terms and conditions not specifically stated in this solicitation and resulting agreement. Venue for any lawsuit brought by either party against the other party or otherwise arising out of this Contract shall be in Indian River County, Florida, or, in the event of a federal jurisdiction, in the United States District Court for the Southern District of Florida.

Conflict of Interest: Any entity submitting a bid, proposal, qualifications or entering into a contract with the County shall disclose any relationship that may exist between the contracting entity and a County Commissioner or a County Employee. The relationship with a County Commissioner or a County Employee that must be disclosed is as follows: *father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, daughter-in-law, son-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, half sister, grandparent, or grandchild*. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of the entity. The disclosure of relationships shall be a sworn statement made on a County approved form. Failure to submit the form will be cause for rejection of the bid or proposal.

Prohibition Against Contingent Fees: If a contract is entered resulting from this request for qualifications, it shall include a prohibition against contingent fees statement, as required by FS 255.087.

Right to Protest: Any actual or prospective responding Proposer who is aggrieved in connection with a competitive selection process may protest to the Purchasing Manager. The protest shall be submitted to the Purchasing Manager in writing within five (5) calendar days after the bidder or proposer knows or should have known of the facts giving rise to the protest. If the protest is not resolved by mutual agreement, the Purchasing Manager shall promptly issue a decision in writing, after consulting the Department and the Office of the County Attorney.

Committee Meetings: Notice of committee meetings will be posted to the RFP's listing on Demandstar.com and Vendor Registry, both available through the County's web site (https://indianriver.gov/services/management_budget/purchasing/index.php). Any portion of a meeting pursuant to a competitive solicitation, at which negotiation strategies are discussed, a vendor makes an oral presentation, or answers questions as part of a competitive solicitation is exempt from the Public Meeting requirements in Chapter 286.011 (per Chapter 286.0113(1)(b)1).

Awards: The County reserves the right to cancel the solicitation, reject any and all Proposals or waive any irregularity or technicality in submittals received. The County reserves the right to not make any award(s) under this solicitation.

Termination by the County: The County reserves the right to terminate a contract by giving thirty (30) days notice, in writing, of the intention to terminate, if at any time the Consultant fails to abide by or fulfill any of the terms and conditions of the contract. The County also reserves the right to terminate this contract for convenience of the County and / or with or without cause.

Compliance with Laws and Regulations: Consultant agrees that they will comply with all Federal, State, and Local Laws and Regulations applicable to the production, sale, and delivery of the goods or the furnishing of any labor or services called for by this solicitation and resulting agreement, and any provisions required thereby to be included herein shall be deemed to be incorporated herein by reference. Noncompliance may be considered grounds for termination of contracts.

Insurance:

The Consultant shall provide, prior to execution of the contract, the insurance required under this section for approval by the County. Firm's insurance shall be primary. The County shall be named as an additional insured for both General Liability and Automobile Liability. The awarded firm shall maintain the following limits of insurance during the term duration of this agreement.

General Liability

- Each Occurrence \$500,000
- Fire Damage-any one fire \$50,000
- Medical Expenses-any one person \$5,000
- Personal and Advertising Injury \$500,000
- General Aggregate \$500,000
- Combined Single Limit \$500,000

Automobile Liability – Combined Single Limit \$500,000

Worker's Compensation as required by the State of Florida

- Each accident \$100,000
- Each Disease – Each employee \$100,000

Each disease – policy limit \$500,000

Professional Liability Insurance

\$1,000,000 per occurrence

\$2,000,000 aggregate combined single limit

\$5,000 maximum deductible per claim

The policy shall cover the firm, all employees, and/or volunteers, and all independent contractors, subcontractors and professional contractual persons hired or retained by contractor.

All above insurance policies shall be placed with insurers with a Best's rating of no less than A-VII. The insurer chosen shall also be licensed to do business in Florida. The insurance policies procured shall be "Claims Made" policies or as generally available on the open insurance market.

The Insurance Carriers shall supply Certificates of Insurance evidencing such coverage to the Indian River County Risk Management Department prior to the execution of this Agreement.

The insurance companies selected shall send written verification to the Indian River County Risk Management Department that they will provide 30 days written notice to the Indian River County Department of Risk Management of its intent to cancel or terminate.

Indian River County reserves the right to accept or reject any or all proposals in whole or in part and waive any and all any technicalities or irregularities.

FIRM INFORMATION FORM

Communications concerning this proposal shall be addressed to:

Company Name			
Tax ID Number		W-9	Attached <input type="checkbox"/>
Contact Name		Phone	
Title		Email	
Address			

The following addenda are hereby acknowledged:

Addendum Number	Date
_____	_____
_____	_____
_____	_____
_____	_____

1. Date Registered with e-Verify.gov: _____ Certificate # _____

2. List all ligation cases during the past three (3) years in which the Consultant has been a named party.

Use additional sheets, as necessary.

Year filed	Case number	Venue	Description

REFERENCE FORM

The Consultant/Firm below has listed you as a performance reference. We would appreciate your time in completing this survey to assist us in evaluation of the Consultant/Firm's qualifications.

Consultant/Firm Name

Your Project's Name & Primary Goals/Objectives

Name of Your Organization

Name of Person Completing Form

Title

Has the work of the Firm been consistently thorough, acceptable and professional? Yes No

Did this Consultant/Firm complete the work in a timely manner? Yes No

Were there any delays or added days to the project? Yes No

Were the methodologies and approaches used by the Consultant/Firm appropriate and effective for your project needs? Yes No

Were there any challenges in communication, and if so, how were they addressed?

Please describe any problems with this Consultant/Firm's work, product or conduct, if applicable.

Were there any disputes regarding their work, including pending or ongoing litigation or the collection of liquidated damages? Yes No If yes, please describe.

What impact did the Consultant/Firm's work have on your economic development initiatives?

How well did the Consultant/Firm engage with stakeholders and incorporate their feedback into the project?

Is there any additional feedback you would like to provide about your experience working with this Consultant/Firm?

Would you utilize this Consultant/Firm in the future should you have the opportunity? Yes No

Please rate the Consultant/Firm's overall job performance.

Excellent Very Good Good Fair Poor

May we contact you to obtain additional information? Yes No

SWORN STATEMENT UNDER SECTION 105.08, INDIAN RIVER COUNTY CODE, ON DISCLOSURE OF RELATIONSHIPS

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement **MUST** be submitted with Bid, Proposal or Contract No. 2024049
for RFP for EDSAP

2. This sworn statement is submitted by: _____

(Name of entity submitting Statement)

whose business address is:

_____ and its Federal Employer Identification Number (FEIN) is _____

3. My name is _____
(Please print name of individual signing)

and my relationship to the entity named above is _____

4. I understand that an “affiliate” as defined in Section 105.08, Indian River County Code, means:

The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of the entity.

5. I understand that the relationship with a County Commissioner or County employee that must be disclosed as follows:

Father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, daughter-in-law, son-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, half sister, grandparent, or grandchild.

6. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. [Please indicate which statement applies.]

_____ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the

entity, have any relationships as defined in section 105.08, Indian River County Code, with any County Commissioner or County employee.

_____ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents, who are active in management of the entity have the following relationships with a County Commissioner or County employee:

Name of Affiliate or entity	Name of County Commissioner or employee	Relationship
_____	_____	_____
_____	_____	_____
_____	_____	_____

(Signature)

(Date)

STATE OF _____

COUNTY OF _____

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this ____ day of _____, 20____, by _____ (name of person making statement).

(Signature of Notary Public - State of Florida)

(Print, Type, or Stamp Commissioned Name of Notary Public)

who is personally known to me or who has produced _____ as identification.

CERTIFICATION REGARDING PROHIBITION AGAINST CONTRACTING WITH SCRUTINIZED COMPANIES

(This form **MUST** be submitted with your response)

I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit have been placed on the Scrutinized Companies that Boycott Israel List created pursuant to s. 215.4725 of the Florida Statutes, or are engaged in a boycott of Israel.

In addition, if this solicitation is for a contract for goods or services of one million dollars or more, I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit are on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473 of the Florida Statutes, or are engaged in business operations in Cuba or Syria as defined in said statute.

I understand and agree that the County may immediately terminate any contract resulting from this solicitation upon written notice if the undersigned entity (or any of those related entities of respondent as defined above by Florida law) are found to have submitted a false certification or any of the following occur with respect to the company or a related entity: (i) it has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or (ii) for any contract for goods or services of one million dollars or more, it has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or it is found to have been engaged in business operations in Cuba or Syria.

Name of Respondent: _____

By: _____
(Authorized Signature)

Title: _____

Date: _____

Attachment A – Sample Agreement

This document is provided as a word document, for ease of editing in track changes mode.

Attachment B – Previous EDSAP



Indian River County

Strategic Positioning, Target Industry Assessment & Action Plan

Fellsmere, Indian River Shores,
Orchid, Sebastian, Vero Beach

March 3, 2015



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Section 1.1: Executive Summary

Project Overview

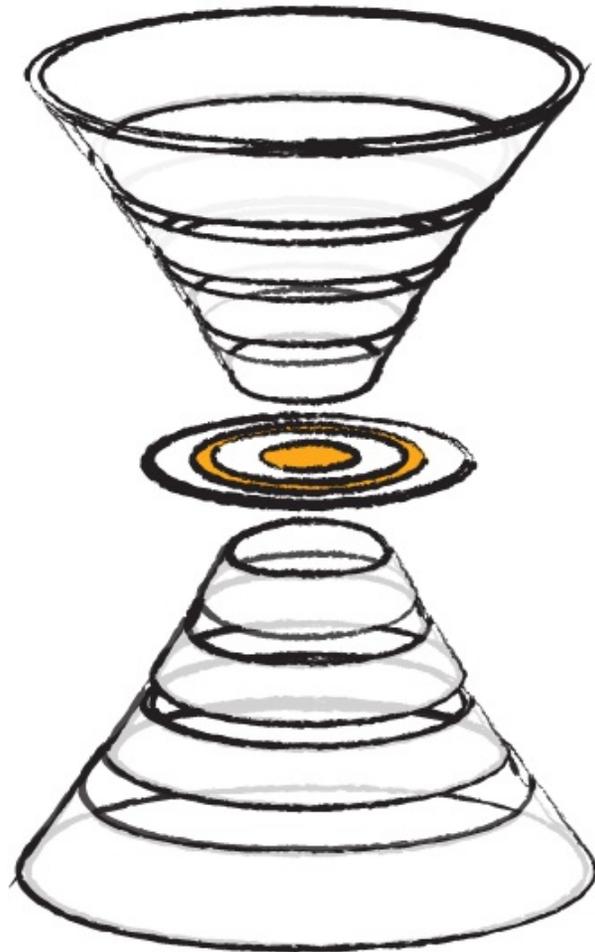
The Indian River County Strategic Positioning, Target Industry Assessment & Action Plan began in late July of 2014 with a site visit to Indian River County, which included 12 property visits, input from over 75 stakeholders, 47 business interviews, and participation from over 120 area organizations. Ady Advantage also completed extensive secondary research and compiled it into this report to develop a strategic positioning for the county, including an assessment of the current Indian River County target industries. The primary and secondary research focused on an economic region that includes Indian River County (IRC) and areas within a 45-minute drive time from IRC, including St. Lucie County and the south half of Brevard County (Melbourne South). All of this information has been synthesized into an action plan that will determine how the county should position its economic assets and how to address key areas in need of change to ensure long-term economic success.

This section of the report is meant to highlight the positioning process and key findings and recommendations. For in-depth research, findings, and recommendations, please review the entirety of the report.

Section 1.2: Executive Summary: Project Approach

Project Approach

The key steps used to develop the competitive positioning for Indian River County are summarized below



DISCOVER

- On-Site Visit and Stakeholders Summit
- Sites & Buildings Assessment
- Location Criteria Research

DISTILL

- Asset Maps
- Target Industries Assessment and Comments
- Economic Development Positioning Analysis

DO

- Action Plan
- Marketing Plan (Optional)
- Branding Review & Recommendations (Optional)
- Website Audit or Redesign (Optional)



Section 1.3: Executive Summary: Participation by Stakeholders & Business Leaders

Stakeholder Participation Overview

We have received input from over 75 stakeholders during this project. The stakeholders come from various backgrounds including state and local government, utilities, educational facilities, railroad operations and other interested parties. Some of the specific organizations that we met with include:

Stakeholder Participation		
2014 NPA candidate County Commissioner	Business Development Board of Martin County	Canaveral Port Authority
Career Source	City of Fellsmere	City of Sebastian
City of Vero Beach	Congressman Bill Posey	Dr. Martin Luther King, Jr. Birthday Committee of Indian River County
EDC of St. Lucie County	Enterprise Florida	Florida Atlantic University-Harbor Branch
Florida City Gas	Florida East Coast Railway	Florida MEP - Melbourne Airport
Florida Power and Light	former City Council & EDC Board Member	former Planning & Zoning Chairman
Gifford Youth Activity Center	Harvest Food & Outreach	Indian River County
Indian River County Board of Commissioners	Indian River County Chamber of Commerce	Indian River County MPO
Indian River County School Board	Indian River County School District	Indian River County Sheriff's Office
Indian River Fire Fighters Association	Indian River Neighborhood Association	Indian River State College
IRC Enterprise Zone Development Agency	IRC Planning Division	Juvenile Justice
Keep Indian River Beautiful	Main Street Vero Beach	Navy
Okeechobee County Chamber of Commerce	Political candidate, State Representative	Port Canaveral
Progressive Civic League of Gifford	Small Business Development Center at Indian River State College	Sebastian River Area Chamber of Commerce
Senior Resource Association	Taxpayers' Association of Indian River County	United Way of Indian River County



Section 1.3: Executive Summary: Participation by Stakeholders & Business Leaders

Business Leader Participation Overview

During our visit we interviewed 47 business leaders from various industries and backgrounds. Some of the specific businesses that we met with include:

Employers Interviewed		
7 Seas Composites, LLC	AT&T Florida	Azzly
Brown & Brown Insurance	Biomass Genesis	Communications International
CVS Caremark	David Francis Furniture	Ecotech Development
Fellsmere Joint Venture	Indian River Medical Center	INEOS
Insite Solutions	Kite Properties	Marine Bank & Trust Co.
Mastercard	Mirzam Group - FOA	NetBoss Technologies
Next Level Security Systems	Nierzan Group	Nylacarb Corporation
Ocean Properties: Holiday Inn, Hampton, Country Inn	Piper Aircraft Inc.	PR/Media/Communications
Real Estate Affairs	Riverfront Groves	Schlitt Services
Sebastian River Medical Center	SLC Commercial Bird Realty Group	Syngenta
The Hill Group	The Laurel Agency	Vero Beach Airport
	Wells Fargo Home Mortgage	



Section 1.3: Executive Summary: Participation by Stakeholders & Business Leaders

Participants Overview

In total, Ady Advantage received input from at least 120 area participants, through interviews, focus groups, surveys, and a summit meeting:

NAME	TITLE	ORGANIZATION
Alberto Cabrera	Senior Director of Cargo Business Development	Port Canaveral
Allison McNeal	Director of Tourism	Indian River County Chamber of Commerce
Althea McKenzie		2014 NPA candidate County Commissioner
Amelia Graves	Councilmember	City of Vero Beach
Amy Brunjes	External Affairs Manager	Florida Power and Light
Anna Brooks	Chief Nursing Executive	Sebastian River Medical Center
Beth Mitchell	President	Sebastian River Area Chamber of Commerce
Betty Putilin	President	Biomass Genesis
Bill Penney	President	Marine Bank & Trust Co.
Bill Schutt	Economic Development Planner	IRC Planning Division
Bob Ledoux	Senior Vice President	Florida East Coast Railway
Bob Solari	County Commissioner	Indian River County
Bryan Delp	Manager	Syngenta
Cara Perry	Community Relations	Florida Atlantic University-Harbor Branch
Carol Wheatley	Grant Writer	Florida MEP - Melbourne Airport
Catherine McKenzie	Regional Director Legislative & External Affairs	AT&T Florida
Chuck Mechling		Insite Solutions
Clyde Mathis	Maritime Professional	Port Canaveral
Coletta Dorado	President & CEO	Azzly
Cynthia Soucy	Human Resource Manager	CVS Caremark
Dan Cummings	VP Operations	INEOS
Dan Kross		Brown & Brown Insurance
Dan Lamson	Executive Director	Indian River Neighborhood Association
Dan Ritchie	President	Riverfront Groves
Dave Moberg	Professor	Indian River State College
David Mitchell	Regional Program Manager	Florida MEP - Melbourne Airport
Dick Canter	FSBDC Consultant	SBDC of IRSC
Don Cooley		Nylacarb Corporation

NAME	TITLE	ORGANIZATION
Don Wright	Retired	former City Council & EDC Board Member
Donna Hagedorn	Human Resources	Indian River Medical Center
Donna Rivett	Director of SBDC at IRSC	Indian River State College
Dr. Edwin Massey	President	Indian River State College
Dr. Fran Adams	Superintendent	Indian River County School District
Dr. Megan Davis	Executive Director	Florida Atlantic University-Harbor Branch
Eric Flowers	Public Affairs Sergeant	Indian River County Sheriff's Office
Eric Menger	Director	Vero Beach Airport
Freddie Woolfork	President	Progressive Civic League of Gifford
Freddy Morco		Navy
Gail Richardson	Freelancer	PR/Media/Communications
George Hamner		former Planning & Zoning Chairman
Glenda Harden	Vice President of Operations	Career Source
Glenn Heran	CPA	Real Estate Affairs
H. Tim Smith	Director, Human Resources	Piper Aircraft Inc.
Helene Caseltine	Economic Development Director	Indian River County
Jack Schluckebier		Florida MEP - Melbourne Airport
Jackie Warrior	Council Member	Juvenile Justice
Jacqueline Carlon	Director, Marketing & Corporate Communications	Piper Aircraft Inc.
Janie Hoover		Main Street Vero Beach
Jason Brown	Director, Office of Mgt. and Budget	Indian River County MPO
Jason Higgs		Mastercard
Jason Nunemaker	City Manager	City of Fellsmere
Jay Hart	Vice President	Wells Fargo Home Mortgage
Jeff Murray		Fellsmere Estates / Fellsmere Joint Venture
Jeff Pincheon	Owner	7 Seas Composites, LLC
Jeff Schlitt	Vice President	Schlitt Services
Jeff Smith	Clerk of the Circuit Court	Indian River County



NAME	TITLE	ORGANIZATION
Jeff Susi	CEO	Indian River Medical Center
Jennifer Bates	Sales Director	Ocean Properties: Holiday Inn, Hampton, Country Inn
Jim O'Connor	City Manager	City of Vero Beach
Jim Odum	CEO	NetBoss Technologies
Joe Flescher	County Commissioner	Indian River County
Joe Griffin	City Manager	City of Sebastian
Joe Idlette III	President	Progressive Civic League of Gifford
Joel Tyson	Vice Mayor	City of Fellsmere
John Higgs	Vice Chairman	Indian River Neighborhood Association
John King	Emergency Services Director	Indian River County
John Kistler	President	Taxpayers' Association of Indian River County
John O'Connor	President	Indian River Fire Fighters Association
Jorge Cisneros	R&D Manager	Syngenta
Jorge Lugo		political candidate, State Representative
Joseph Baird	Administrator	Indian River County
Karen Diegl	President/CEO	Senior Resource Association
Karen Mechling	President	Insite Solutions
Karen Mitchell	VP/Chief Human Resources Officer	Indian River Medical Center
Karl Zimmerman	Vice Chairman Local Code Enforcement	IRC BDC Enterprise Zoning Development Agency
Keith Kite	Managing Partner	Kite Properties
Kelly Enriquez	CEO	Sebastian River Medical Center
Kris Caldwell	HR Director	NetBoss Technologies
Leslie Swan	Supervisor of Elections	Indian River County
Lewis Clark	VP of Marketing/Corp.Communication	Indian River Medical Center
Linda Morgan	Chairman	Dr. Martin Luther King, Jr. Birthday Committee
Marcelo Dossantos	Business Services Director	Career Source
Marco Baez	Director	Ecotech Development
Mark Feurer	President	Communications International
Martha White	HR Manager	Communications International
Michael Corbit	Director, Employer & Community Relations	Career Source
Michael Kint	CEO	United Way of Indian River County
Michael Walther	President/Director	Coastal Tech/IRC Chamber of Commerce
Mike Yurocko	Vice President & Broker	SLC Commercial Bird Realty Group
Monte Falls	Director of Public Works	City of Vero Beach

NAME	TITLE	ORGANIZATION
Nancy Boone	Specialist	Career Source
Oswald Sousa	Managing Partner	Mirzam Group - FOA
Pamela Gillespie	Director Community Relations	Congressman Bill Posey
Penny Chandler	President	Indian River County Chamber of Commerce
Pete Jankowski	President	Next Level Security Systems
Pete Tesch	LEDO	EDC of St. Lucie County
Peter G. Robinson	President	The Laurel Agency
Peter O'Bryan	County Commissioner	Indian River County
Richard Winger	Mayor	City of Vero Beach
Robert Sitterley	VP Business Development	Enterprise Florida
Ron Richmond	Senior Director Operations	CVS Caremark
Sasan Rohani	Chief of Long-Range Planning	Indian River County
Scott Cooley	President	Nylacarb Corporation
Shannon Feeley	Assistant Director, Cargo Business Development	Canaveral Port Authority
Shawn R. Frost	Member-Elect	Indian River County School Board
Stan Boling	Planning Director	Indian River County Board of Commissioners
Susan Adams	Mayor	City of Fellsmere
Susan Oswald		Nierzan Group
Tammy Vock	City Clerk	City of Vero Beach
Terry Burrows	LEDO	Okeechobee County Chamber of Commerce
Terry Swett	President	David Francis Furniture
Terry Torres	President	SLC Commercial Bird Realty Group
Tim Dougher	LEDO	Business Development Board of Martin County
Tim Knutson	Account Executive	Florida City Gas
Tim Zorc	County Commissioner	Indian River County
Toby Hill	President	The Hill Group
Vicki Wild	Executive Director	Keep Indian River Beautiful
Vicky Gould	President	Main Street Vero Beach
Vincent Burke	Utilities Director	Indian River County
Wesley Davis	County Commissioner	Indian River County
Willie Finklin	Program Director	Harvest Food & Outreach



Section 1.4: Executive Summary: Sites & Buildings Assessment

Overview

Sites and buildings are a key element to economic development; if you do not have any available properties or sufficient available properties you do not have anything to offer to expanding or relocating businesses. Understanding the quality and key aspects of an area's properties help when assessing target industries and future opportunities. During the site visit the week of July, 14th, 2014, Ady Advantage visited 12 properties within Indian River County in total, which are listed in section 4.1, however some of the key highlights and recommendations are as follows:

- Overall, the ED team provided an excellent, detailed map with each property marked and readily provided an overview of the county in terms of assets. Ady Advantage was also provided with a packet with most of the basic information, such as labor shed, major private-sector employers, and incentives. Including information at a regional or four-county level would have also been helpful as it would provide detail on some of the major assets nearby that expanding or relocating businesses could potentially tap into, such as airports, colleges, ports, unique assets, etc. Site selectors start their search at the regional level and often times they have specific criteria that they are looking for (e.g., minimum number of people or labor, training programs, airports, education, etc.), depicting your area as a region or at least supplying that level of information will help Indian River County get past the initial screening.
- Information on each property was inconsistent. Ady Advantage was given at least one handout on each property. Property listing information needs to be more completely filled out, especially information about utility capacity and building characteristics.
- Out of the 12 properties that Ady Advantage visited only 7 of them were currently listed on the Florida state website (www.enterpriseflorida.com/find-properties) and only 7 were listed on the Indian River County website (www.indianriversites.com). Getting all available properties listed on the state site is extremely important as most searches start at the state level. It is also very important to list them on the Chamber's site as well.
- All of the buildings that Ady Advantage visited were owned by private parties or by developers; none were owned by the county or chamber/EDC. This limits some of the control the county or cities might have and also adds another variable to the mix when a business is looking to lease or purchase. Think about taking ownership of one or more of the buildings or, at the very least, make sure that the county or cities and the property owner(s) are all on the same page and agree on key elements such as what type of business would be welcome, who will be responsible for certain costs (e.g., utility upgrades, road improvements, etc.), zoning, permitting, and general price so when the time comes to show/negotiate with a prospective business there are no surprises.



Section 1.5: Executive Summary: Indian River County Competitive Position

Introduction

Competitive positioning statements are “elevator pitches” or what you would tell a site selector if you only had a few minutes to talk to him/her. These are important as they depict the county’s strengths and also act as a guide when marketing the county. The Indian River County competitive positioning statement was created based on primary research (including dozens of interviews, several stakeholder input sessions, and many property visits), secondary research (desk research), and site selector knowledge. This process allowed Ady Advantage to create the most complete and accurate positioning for the county.

Overall Positioning

Indian River County has access to a labor force of over 470,000, which has been growing at a rate of 17.5 percent over the last ten years. These individuals are well educated, 87.3 percent of them have graduated high school, and have access to some of the best training in the nation including Indian River State College, which was recently named a top ten community college in the nation. That being said, the cost of doing business is low. Florida is rated the 5th best state in terms of state business tax climate and offers some of the best training grants in the nation. In addition, Indian River County has some of the lowest millage rates in the state along with reduced impact fees for specific industries. Access to raw materials and markets is also an advantage within Indian River County as there is ample access to regional markets via I-95 and the Florida Turnpike. Access to international markets is available via the two municipal airports, nearby Orlando International Airport, and several major ports located on the eastern coast. The closest port, Port Canaveral, is designated as a foreign trade zone and can ship products easily to Canada, South America, Europe, Africa, and Asia. All of this before we even mention the superb quality of life experienced within a coastal Florida county.

Talking Points

Low Cost of Doing Business:

- Florida is rated as the 5th best state in terms of state business tax climate.
- Indian River County has some of the lowest millage rates within the state.
- The cost of living within Indian River County is four percent lower than the national average.

Transport:

- There is ample access to regional markets via I-95 and SR 60, which run through the county, and the Florida Turnpike, which can be accessed just west of the county via SR 60 or south of the county via I-95.
- Access to international markets is available through several major ports on the coast. The closest being Port Canaveral, which is about an hour away.
- Indian River County also has two airports and is within a 90-minute drive of one of the nation’s largest airports in Orlando.

Labor:

- Labor costs are 5-13 percent lower than the national average across the board.
- Florida has a low unionization rate of 5.4 percent, which is 5.9 percent lower than the national average.

Training:

- Indian River County has access to some of the best training grants and resources in the nation.
- Indian River State College was named one of the best ten community colleges in the country.



Section 1.6: Executive Summary: Target Industry Assessment

Overview

Indian River County's current target industries were agreed upon in October of 2010 when the county completed and adopted their 2030 comprehensive plan. These target industries are as follows:

- Clean Energy
- Life Sciences
- Information Technology
- Aviation/Aerospace
- Financial/Professional Services
- Manufacturing/Warehouse/Distribution
- Emerging Technologies
- Arts, Entertainment, and Recreation
- Post Secondary Public and Private Educational Institutions
- Other Clean Light Industries

The list of industries above is not very targeted. In site selection there is a saying, “If you specialize in everything you are specialized in nothing”. This means that having a laundry list of industries that you believe Indian River County should target shows to site selectors and businesses that you don't truly understand your value proposition or your key differentiating factors that make Indian River County unique.

Target Industry Recommendations

Although Ady Advantage recommends completing a full target industry analysis to determine the most appropriate target industries for Indian River County, Ady Advantage feels confident confirming the targeting of the following industries based on the research conducted in this study:

- Manufacturing:
 - Aviation/Aerospace
- Life Sciences/Research
- Regional Warehousing/Distribution

These industries have been identified and are selected based on industry knowledge, current clusters, and/or strong assets within the county. Ady Advantage would encourage the county to conduct further research to identify other specific industries to target as well as develop key positioning statements for each industry. This method of communicating unique regional attributes and strengths provides a solid foundation for both business recruitment and expansion.

Overall, when deciding which industries to target look closely at what the positioning or story might be to each of them. If there is not a compelling story, from a businesses perspective, then it should not be a target industry for the county. A target industry should not simply be a wish list of industries that a county would like to attract but a list of industries that the county either currently excels at or would excel at given the opportunity. What the county excels at should be specific and quantifiable through statistics, local and regional assets, and testimonials.



Section 2: Project Goals & Process

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Section 2.1: Project Goals & Process: Project Goals

Project Goals

- Gain an objective understanding of the county's economic assets...
- ... in order to develop a strong positioning for the county...
- ... so that it can effectively market the region.

Deliverables

- Assessment of key themes and findings from numerous community and business leader discussions
- Review of available sites and buildings
- Competitive positioning of the region
- Assessment and recommendation of target industries
- Action plan

Project Approach

Our project approach was designed to provide the best possible outcomes based on a methodology that is strategic, integrated and practical. Strategic to make sure your overall business goals are met. Integrated within one consultancy to ensure that momentum, context and efficiencies are optimized. And practical in that we know how to communicate with your target audiences based on our work with hundreds of other EDOs, and in our position as site selectors.



Section 2.2: Project Goals & Process: Project Process

Project Process

The key activities and representative outcomes of each are as follows:

Site Visit and Location Criteria Research:

- What are Indian River's core economic assets? Limitations?
- What are the county's biggest challenges? Opportunities?
- What are the core industries currently located in the county? What are potential new industries?
- What are the most viable sites and buildings in the county?
- For which industries are they suitable?
- Which actions need to be taken, if any, to make key sites and buildings more market-ready?

Competitive Positioning:

- Which factors both unite and differentiate the county?
- What is the county's optimal positioning within the market place overall?

Target Industries:

- In which industries should we focus our limited resources, for both business retention/expansion and business recruitment?

Action Plan:

- How should the County position its economic assets to current, relocating and expanding businesses?
- What are key areas that need to be addressed by the County for long-term economic success?



Section 2.3: Project Goals & Process: Scope of Services

Project Workplan

In order to address the stated outcomes, the following multi-step methodology will be used.

PHASE I –	
TASK 1:	Convene Community Stakeholders Summit
TASK 2:	Conduct Quantitative/ Qualitative “Place” Perception Survey <i>(How people see/perceive IRC)</i>
TASK 3:	Conduct Competitive Positioning Assessment <i>(How IRC Compares to Competing Communities)</i>
TASK 4:	Brief Assessment of County’s Target Industries <i>(What Companies the County is or should be pursuing)</i>
TASK 5:	<u>Prepare Draft</u> Economic Development Positioning Analysis Report
TASK 6:	Conduct Community Stakeholders Summit #2
TASK 7:	<u>Prepare Final</u> Economic Development Positioning Analysis Report & Action Plan
TASK 8:	<u>Present Final</u> Economic Development Positioning Analysis Report & Action Plan <i>(BCC Meeting #1)</i>
TASK 9:	OPTION – <u>Present Revised Final</u> Economic Development Positioning Analysis Report & Action Plan <i>(Optional BCC Meeting #2)</i>
PHASE II – Not Part of Contract Unless Approved by BCC as part of a future addendum.	
TASK 1:	OPTION – Identify Current Marketing & Branding Efforts <i>(How IRC is presented to others)</i>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 1: Convene Community Stakeholders Summit

Ady Advantage Solution	Product	Due Date
<p>Conduct Summit: Three Ady Voltedge staff (Janet Ady, Bennett Syverson, and Brandon Rutz) will conduct a 5-day visit of the county. We will conduct a Community Stakeholders Summit to explain the positioning process, outline the plan of action, and gather initial input. This will include: an initial meeting with key community leaders (preferably 10-15 people max), many interviews with business leaders / stakeholders / government officials / key residents / key partners, and a community input session.</p> <p>Sites and Buildings Assessment: If a community does not have suitable sites and buildings, it does not have a product to sell. Consultant recommends substituting out a day (or day-and-a-half) of interviews to have one of us look at available sites and buildings and write up top-line recommendations. This task to be completed by Janet during the Community Stakeholders Summit listed above.</p>	<p>Summary presentation including educational materials. Report that includes a stakeholder input analysis, an employer input analysis, and a sites and building analysis.</p> <p>Report due: September 12th</p>	<p>September 12, 2014* <i>(Approx. 1 month after contract execution)</i></p>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 2: Conduct Quantitative/ Qualitative “Place” Perception Survey (How people see/perceive IRC)

Ady Advantage Proposed Solution	Product	Due Date
<p>We will conduct a quantitative/ qualitative “Place” perception survey to solicit attitudes and perceptions about the area as a place to live, work, and/or visit and obtain suggestions for strengthening positives and making changes to reverse any negative perceptions. This shall be accomplished through one-on-one interviews, focus groups, and undercover interviews (unbiased feedback).</p> <p>At least 70 interviews to include local government officials (including municipal officials), residents, business leaders, company executives, workforce and educational partners, visitors, prospective businesses, and other internal and external stakeholders.</p> <p>This was completed during consultant’s 5-day on-site visit. For additional details please see consultant’s proposed solution for the first task on the previous page. The report from this task will be completed and provided to the County by September 12th, 2014</p>	<p>Report #1: Report summarizing findings, including identification of positive and negative perceptions and ideas from surveyed people/groups for strengthening positives and reversing negatives.</p> <p>Report due: September 12th</p>	<p>September 12, 2014*</p> <p><i>(Approx. 2-3 months after contract execution)</i></p>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 3: Conduct Competitive Positioning Assessment *(How IRC Compares to Competing Communities)*

Ady Advantage Proposed Solution	Product	Due Date
<p>Consultant routinely conducts an analysis of location criteria for each project consultant undertakes. This is the same process a site selector would take when evaluating a county and/or region. It is an analysis of 50-60 locational criteria where consultant reviews all local material and conduct additional research (e.g., population, labor force, growth, cost of living, wages, crime, etc.) ranking the county against the surrounding MSAs, regions, and states. Consultant can include the Policom factors as well as the competitive counties you noted.</p> <p>Following this analysis consultant develops what are called asset maps for business costs and business conditions. Asset maps are a 4-box table, which rates your county on key locational criteria. Importantly, this step also includes input consultant gained from consultant’s field research in the previous step.</p> <p>Once the asset maps are completed consultant creates a competitive positioning for your region based on the criteria your county excels at. Other important criteria the county does not excel at is used to identify gaps.</p> <p>Report items resulting from this step include business costs and conditions assets maps, a written community assets analysis (based on 40-50 site selector criteria), and county wide positioning statement and talking points. The report from this task will be completed and provided to the County by October 17th, 2014</p>	<p>Report #2: Summary Comparison Report.</p> <p>Report due: October 17th</p>	<p>October 17, 2014*</p> <p><i>(Approx. 3 to 4 months after contract execution)</i></p>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 4: Brief Assessment of County’s Target Industries

(What Companies the County is or should be pursuing)

Ady Advantage Proposed Solution	Product	Due Date
<p>Briefly review and assess the County’s current Target Industry list, and recruitment and retention efforts by Indian River County, its municipalities and the Indian River County Chamber of Commerce.</p> <p>Identify industry clusters that have developed/ expanded in Indian River County over the past ten years. Identify industry clusters developing in adjacent counties.</p> <p>Identify new target industries that the County may want to consider pursuing more aggressively. Provide the associated business case for each recommended change.</p> <p>Consultant will review your current target industries and look at the research completed to date (e.g., on-site visit, business and community interviews, asset mapping, positioning, etc.) along with recent expansions and relocations in the county to determine if the current industries still make sense and if there might be additional industries that would be a good fit. Report item resulting from this step will be a written assessment of the County’s target industries, which will be completed and provided to the County by November 14th, 2014</p>	<p>Report #3: Summary report with recommended changes to Target Industry List</p> <p>Report due: November 14th</p>	<p>November 14, 2014*</p> <p><i>(Approx. 3 to 4 months after contract execution)</i></p>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 5: Prepare Draft Economic Development Positioning Analysis Report

Ady Advantage Proposed Solution	Product	Due Date
Compile and synthesize report numbers 1 through 3 into a draft report and provide an executive summary. Provide recommended actions based on findings in each report. The report will be completed and provided to the County by December 12 th 2014	Draft Analysis Report Report due: December 12th	December 12, 2014* <i>(Approx. 4 to 5 months after contract execution)</i>

PHASE I – TASK 6: Conduct Community Stakeholders Summit #2

Ady Advantage Proposed Solution	Product	Due Date
Present positioning activities conducted to date in-person (including two Ady Voltedge staff on-site for a half-day), present the Draft Economic Development Positioning Analysis Report and obtain feedback. Revise report as appropriate. Identify revisions made based on feedback at Summit #2. Present report on January 8 th , 2015.	Draft Analysis Report Presentation: January 8th	January 8, 2015* <i>(Approx. 5-6 months after contract execution)</i>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

PHASE I – TASK 7: Prepare Final Economic Development Positioning Analysis Report & Action Plan

Ady Advantage Proposed Solution	Product	Due Date
Prepare a final written report & action plan with recommendations (incorporating any changes from Community Stakeholders/Community Leader’s Summit), and provide an executive summary. The report will be completed and provided to the County by February 9 th , 2015	Report #4 Report due: February 9th	February 9, 2015* <i>(Approx. 6 months after contract execution)</i>

PHASE I – TASK 8: Present Final Economic Development Positioning Analysis Report & Action Plan (BCC Meeting #1)

Ady Advantage Proposed Solution	Product	Due Date
Present positioning activities conducted and Final Report & Action Plan to the Board of County Commissioners (BCC) in-person (including one Ady Voltedge staff on-site for a half-day). Obtain feedback. Revise Final Report and Action Plan based on BCC direction and identify changes made based on BCC direction at BCC meeting #1. Present report on March 3 rd , 2015.	Final Analysis Report & Action Plan Presentation: March 3rd	March 3, 2015* <i>(Approx. 7 months after contract execution)</i>



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

OPTIONAL – Not Part of Contract Unless Approved by BCC as part of a future addendum.

PHASE I – TASK 9: Present Revised Final Economic Development Positioning Analysis Report & Action Plan *(Optional BCC Meeting #2)*

Ady Advantage Proposed OPTIONAL Solution	Product	Due Date
If warranted, County may request that the revised Final Report & Action Plan be prepared and presented to the BCC that incorporates changes requested at BCC meeting #1. Obtain feedback. Modify the revised Final Report and Action Plan based on BCC direction and identify changes made based on BCC direction at BCC meeting #2.	Revised Final Analysis Report & Action Plan	Date TBD



Section 2.4: Project Goals & Process: Project Workplan and Deliverables

Project Deliverables and Timeline

OPTIONAL – Not Part of Contract Unless Approved by BCC as part of a future addendum.

PHASE II – TASK 1: Identify Current Marketing & Branding Efforts *(How IRC is presented to others)*

Ady Advantage Proposed OPTIONAL Solution	Product	Due Date
<p>An 18-month Marketing Plan. Indian River County will be competing against more than just the surrounding area (and competitive markets will be different depending on the target industry) and therefore needs to have a broader scope than simply regional marketing opportunities. Within the marketing plan, consultant will identify the key audiences that should be targeted as well as research and recommend the most appropriate way to reach each audience. This will require working directly with your organization to understand what your budget is or should be as well as having a good understanding of your capacity to undertake some of the recommended marketing strategies and/or tactics. The marketing plan will also outline estimated costs and recommend an appropriate timeline for completion.</p> <p>Branding Review and Recommendations. Branding follows the positioning, so if a new “brand” or message needs to be introduced, now is the time to do it. Consultant is assuming that consultant would develop a new or revised logo, brand standards (fonts, color palette, visual imagery style, and business card/letter head layout). In concert with the positioning, this would constitute IRC’s brand.</p> <p>OPTIONAL Website Audits: As desired, consultant can conduct website audits and analyses. Consultant has conducted over 100 such audits of E.D. websites and teaches classes on the topic. Price assumes initial analyses of three ED websites with a teleconference and brief written summary.</p>	Report Summarizing Common branding/positioning themes.	Date TBD



Section 3: Stakeholder & Business Leader Input

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Section 3.1: Stakeholder & Business Leader Input: Overview

Overview and Organization

In total, Ady Voldedge garnered input from at least 120 stakeholders and community leaders, which exceeded the initial goal by more than 70%. The majority of this input was obtained during our on-site visit the week of July 14th. During this visit we interviewed 47 employers, roughly 75 stakeholders, and during our summit on Friday, July 18th, we received input from 45 stakeholders who discussed and filled out our seven-question response form. After the on-site visit, we conducted 2 additional telephone interviews with stakeholders, and the County planning staff launched a public online survey that resulted in another 12 responses. For a complete list of participants please see Section 1.3, starting on slide 6.

It is important to note that the focus of all of the input is on Indian River County, including each of its municipalities, as opposed to an evaluation of either the County planning department, City economic development teams, or the Chamber's economic development team. For purposes of this report, the term "region" is synonymous with "Indian River County."

The stakeholder input session focused on seven key topics:

- What business leaders from outside the region would want to know about Indian River County
- The region's core industries
- How the region has evolved in the last decade
- Indian River County's greatest economic assets
- Indian River County's greatest opportunities for growth
- The biggest challenges facing the region
- The industries or clusters in which the region is, or could be, competitive

The qualitative interviews and focus groups allowed the opportunity to go deeper on some of the above topics, and broader on additional topics. Both the stakeholder input session and the interviews/focus groups were composed of a mix of business leaders, elected officials, and other stakeholders. Therefore, the findings are organized by topic, rather than by audience. In most cases, first the stakeholder session findings are presented (e.g., as Word Clouds) and then related discussions captured during the interviews and focus groups are provided. This gives a more complete understanding of each key topic.

Word Clouds are a way of analyzing lots of input on a specific question by showing the most popular responses in a "word cloud" where the size of the word reflects the frequency that an individual word was used in the response by participants.



Section 3.2.2: Stakeholder & Business Leader Input: Results: Evolution of Region

How has the region evolved in the last decade? *(continued)*

Looking further into **Business:**

- **More variety of business**, submarine~manufacturer, Internet~business
- More **open for business attitude**
- Expansion in infrastructure **but business~decline**
- **More business-friendly**
- A change in attitude towards new business to a **positive** attitude.
- Has benefit in some unique business, INEOS for example, **improved~business~climate**, improved~tourism, new hotels
- Become more business-friendly
- More positive~attitude toward growth

- Government's become more proactive to help business happen
- Real~estate, housing (growth-associated, service and retail)
- Attitude is more business-friendly
- Growth real estate
- Shift away from agriculture and developed a lot of land for real~estate
- Government is more business-friendly
- Crash hit us particularly hard



Section 3.2.2: Stakeholder & Business Leader Input: Results: Evolution of Region

How has the region evolved in the last decade? *(continued)*

Looking further into Growth:

- General growth
- High-end residential (barrier island) growth
- Positive attitude toward growth
- Moderate growth with enhanced political support for economic development
- Housing (growth-associated, service and retail)
- Residential growth
- Slow growth, but steady growth
- Pro-growth, recognizes past mistakes
- From out-of-control growth to recession to slower and manageable growth
- Growth spurt in early 2000's spurred new road construction to support housing market
- Controlled growth after the real estate boom, more private-sector growth balancing quality of life with attracting businesses.
- Growth and prospects were real estate related and the crash hit us particularly hard
- The county has had to evolve due to growth
- Nice but controlled growth, to continue through or else we will have a brain drain in this area as the local youth move to other metropolitan areas that can support the jobs that they will once they are done with school, that are not hospitality based.



Section 3.2.3: Stakeholder & Business Leader Input: Results: Strengths/Assets

What are the region's greatest strengths? Why? (continued)

Following is additional input on the strengths identified by the stakeholders/online survey participants, as well as additional strengths that were elicited during the one-on-one interviews and focus groups. These are *perceived* strengths and must be validated/confirmed.

Education Related

- Indian River State College
 - Covers four counties, the same as the Career Source workforce development board: Martin, St. Lucie, Okeechobee and Indian River.
 - Enrollment is 5,800 students in Indian River, mostly part-time.
 - Offers dual enrollment for high school students
 - Ranked in the Top 10 of Public Regional Colleges in the South by U.S. News
 - It has been and continues to be actively looking for new revenue streams. The College has a lot of training programs, has changed drastically since the early 1990s. At that time, it conducted a Sustainability that provided a vision of STEM education, which the College has pursued.
 - The types of area resources that support STEM:
 - Entomology
 - Agriculture
 - Harbor Branch
 - Smithsonian
 - Now offers both 2-year as well as 4-year degrees.
 - It's an open entry institution; they use a community college approach to the first two years.
 - Have been offering 4-year degrees since 2008, and have granted over 1,600 degrees since then.
 - Examples of some of IRSC's programs:
 - Associates of Arts students are their "bread and butter"
 - Air Conditioning program is popular
 - Health training/nursing
 - Business programs
 - Culinary arts to support the resort industry
 - Agriculture
 - The Kight Center for Emerging Technology, hosting two virtual studios with green screen technology.
 - FastTrack to Manufacturing program which has industry support and offers basic skills, soft skills, MSCE, and measurements. Piper and Sikorsky are both using this program
 - "Dr. Massey is an absolute jewel."
 - One of IRSC's strategies is to engage more with small businesses, including providing entrepreneurial assistance
 - SBDC partners with local businesses focusing on the Stage 2 companies
 - Entrepreneurs are in IRSC's domain, and they offer direct assistance as well as Entrepreneur of the Year recognition



Section 3.2.3: Stakeholder & Business Leader Input: Results: Strengths/Assets

What are the region's greatest strengths? Why? *(continued)*

Education Related *(continued)*

- Florida Atlantic University has a campus in Ft. Pierce located in St. Lucie County and focuses on oceanographic research.
- Florida Institute of Technology (FIT) does a lot in Indian River County:
 - Building a new school on the campus of the IR Medical Center for healthcare professions.
 - Has also partnered with Piper for training.
- There are several private K-12 schools in Indian River County.
 - St. Edward's is a boarding school.
 - St. Helen's offers only primary grades. For high school, St. Helen's kids have to go to Ft. Pierce.
- The Charter School near IRSC is ranked 16th in the state.
- The School District has community support.
 - It had two referendums in the past ten years, both of which were approved.
 - The Village had a referendum two years ago so that it could upgrade its business systems and infrastructure for a digital curriculum. The community supported it.
 - The Moon Shot program is important for the community.

Other Business Resources

- Manufacturing Extension Partnership is a good resource.
- There are a few incubators.
- Percipium Foundation is a group of investors/angels that hosts a business plan competition.
- Career Source is their rebranded Workforce Development Board, which also serves the four-county region. Governor Scott overhauled this to be more like a private entity. They also have the unemployment office now, which has been rebranded as the "re-employment office."
 - Have the most trouble reaching 24-35 year olds. Moving to more social media to accommodate.
 - Wish the EDOs helped spread the word about Career Source more, they should be perfect allies.
 - Described the switch as moving from social work to aligning to the goals of businesses. For example, they now call employers "customers" and workers as "clients."
 - Collect metrics on the number of appointments they have done in each county and results.
 - They would like to award certification "Badges" for skills learned in the military and from prior work experience once they figure out how to verify the skills.
 - All training has to have national certification.
 - Engagement with local employers is increasing. For instance, CVS now has a veteran's program.
 - They offer a youth program to 16 to 21 year olds.



Section 3.2.3: Stakeholder & Business Leader Input: Results: Strengths/Assets

What are the region's greatest strengths? Why? *(continued)*

County and City Fiscal Stability

- County financials are solid.
- Financials for all three cities are solid.

Transportation Related

- Key north-south routes include I-95 and the turnpike, but SR-60 goes from Vero Beach to Tampa, completely east to west across the state.
- Have been trying to get into Port Canaveral FTZ 136. They are about 60 miles away.
- Other inland ports: St. Lucie County, Clewiston, Palm Beach County.
- Then there are deep water ports at the Port of Miami and the Port of Ft. Lauderdale (Everglades), which are reportedly running out of container space; and at Palm Beach.
- Florida East Coast Railroad provides commercial freight
 - Switching station is in Ft. Pierce, which is not deep water, but there is an intermodal ramp there.
 - Everglades has a new intermodal facility that just opened. Moved from Andrews.

Demographics

- Reportedly more billionaires in this county than anywhere else in the US.
- A lot of people have transplanted into the County.
- There is a Philanthropic Society of Indian River County.
- Good high school graduation rate relative to the rest of Florida (among the top 10-15 in the State).

Location

- Within an hour and a half of Orlando, less than three hours to Miami.



Section 3.2.3: Stakeholder & Business Leader Input: Results: Strengths/Assets

What are the region's greatest strengths? Why? *(continued)*

Incentive Related

- Enterprise Zone and HUB Zone in Vero Beach
- Incumbent worker training grants from the state/Jobs Grant is beneficial.
- County Board of Commissioners can approve any project.
 - “Two week turnaround for approvals.”
- All their incentives are specially negotiated, not as of right.
- There is sales tax exemptions on manufacturing equipment.

Attitude

- When it went from 5% unemployment to 16% unemployment, that really got people to sit up and take notice. Now if a manufacturer wanted to come here with 30 jobs, I think all of the commissioners would be very interested in doing what they could to help that company locate here.

Business Taxes

- Reportedly second lowest tax (millage) rate in the state.
- Infrastructure has kept up with population growth.

Workforce

- The workforce was described as mobile, stable, loyal, with a good work ethic.
- One employer said there was no union activity.

Quality of Life

- Modern, “It’s better than Miami.”
- Good dining options
- Philanthropy
- Family-oriented
- Easy public access to beach
- Outdoor activities
- Low crime
- Cultural Amenities
 - Riverside Theatre
 - Theatre Guild
 - Art Center
- Good cultural amenities due to philanthropic donations for museum and theater.
- Good medical facilities.
 - Hearing
 - Heart
 - Cancer
 - Interventional (new)
 - Bariatric Center for Excellence (new)
 - Orthopedic (growth)
 - Family practice (growth)
- Low traffic congestion.
- High-speed internet – good.



Section 3.2.4: Stakeholder & Business Leader Input: Results: Weaknesses

What are the region's greatest weaknesses? Why? (continued)

Following is additional input on the weaknesses identified by the stakeholders/online survey participants, as well as additional weaknesses that were elicited during the one-on-one interviews and focus groups. These are *perceived* weaknesses and must be validated/confirmed.

Emphasis on Economic Development

- Economic development efforts are fractured throughout the county, region and among the cities.
- Believes County spending on tourism is 3-4x as much as it spends on ED.
- County is not proactive regarding E.D.

Economic Development Programs

- Someone came in and did economic gardening for about six months. But there was no follow through. There was a compounding pharmacist that they called on, as well as a circuit board repair company that has clients all over the world.
- Nobody is reaching out for business retention and expansion.
- No support for Tax Incremental Financing.
- The substance needs to match the rhetoric, e.g., let's put another hotel up north.
- Community leadership should reach out to business via business retention and expansion calls.
- Helene does Business Recruitment and Retention/Expansion calls and tries to bring one commissioner. Tries to do 2-3/month.

County- City Communication and Coordination

- ED efforts are very fractured. Help municipalities and counties work together.
- The county makes you feel like you're in the principal's office. Bad customer service. You need to be treated like a valuable customer.
- Good old boy way of doing things in government.
- Communication. County is not talking to city mayors or managers.
- Need leadership from the county.
- Too many chiefs and not enough Indians.
- The biggest problem is that we have to figure out how to work together. Determine relationships and roles before marketing.
- Community services lack effective leadership, not focused on results.
- County comp plan did not include meaningful input from the cities.



Section 3.2.4: Stakeholder & Business Leader Input: Results: Weaknesses

What are the region's greatest weaknesses? Why? *(continued)*

Attitudes

- Nobody is willing to do anything unless you push. There is no sense of urgency here.
- Resistance to change.
- Perception of being anti-growth, anti-business, protective population.
- There is a misperception of growth. The growth can be planned.
- Confusion with people regarding the term, "Economic Development." Believe the "Development" portion has negative connotations due to the association with "Property Development."
- Political leadership is seen by some as "shortsighted" and would be a barrier for future expansion.
- Community is not educated regarding the benefits of existing employers.
- Digital Domains was a disaster that happened in either St. Lucie or Martin County. They got a bunch of state money and local incentives and then flamed out, burning a lot of people to the whole idea of recruitment.
- Knight Armament moved to Brevard County. Supposedly after 9/11, the government made it supply it and they needed to grow FAST and there were no available properties in Indian River County. A sore spot with many.
- Lack of authentic IRC vision, everyone is not on the same page.
- "Too many ideas."
- And from a tourism perspective, the community is slow to adapt to new things to do. Events and other activities are not being communicated readily.
- The biggest barrier to getting visitors to relocate their businesses here is County and City officials. They have deterred a lot of business with the "no growth" attitude and permitting issues. It takes too long to get a permit for something simple.

Workforce / Education

- There are still a lot of seasonal and service jobs.
- Retired and semi-retired employees don't have the needed skillsets for much of the work.
- Low employment opportunities for relocating spouses.
- Lack of unskilled labor.
- Lack of talent.
- Lack of talent for high-tech.
- Difficulty in recruiting.
- Limited professional and personal networking ability due to high retiree population.
- There are no opportunities for professionals such as doctors, lawyers, in this community.
- Locals want to stay here but cannot due to limited opportunities.
- Competitive nature of skilled labor.
- Employees not passing 8th grade reading test.
- The Gen Y workforce does not have a good work ethic. Unskilled workers do not even show up.
- Lack of graduate programs, no accelerated MBA programs. No real higher education bachelor programs in the region.



Section 3.2.4: Stakeholder & Business Leader Input: Results: Weaknesses

What are the region's greatest weaknesses? Why? *(continued)*

Utilities

- Electric rates are 11 – 14 cents/kWh for residential electricity, offered by FP&L and by Vero Beach Municipal Power, respectively.
- No bid process when feeder line is needed. Reportedly costs twice as much.
- No renewable power standard.

Permitting Process

- Fellsmere is the easiest, then Sebastian.
- The County is the most difficult (it oversees all of the unincorporated areas, which is about two thirds of the county's population).
- Using a local engineer and architect is paramount and can mean the difference between 90-120 days or a year or longer to get approvals.
- There isn't a single point of contact for approvals.
- County Fire Department drags its feet on city projects, and then the cities get blamed by residents and businesses for not coming through in a timely manner.
- Impact fees were put into place to stop or slow the growth.
- Install a process where you can instantly mobilize a project with strong public benefit. Assign an Ombudsman for projects.
- Streamline the process in order to put someone in contact with interested businesses quicker. Right now it takes a long time to talk to someone about moving here.

Incentives

- Takes about six weeks to go to the EDC and commissioners

Lack of Quality of Life Factors

- There is a lack of affordable housing.
- Lack of apartments and short term rentals.
- No nightlife: "Zero Beach."
- Declining schools
- OBGYN and pediatric care



Section 3.2.4: Stakeholder & Business Leader Input: Results: Weaknesses

What are the region's greatest weaknesses? Why? *(continued)*

Transportation

- Air travel is tough. Have to go to Orlando or Ft. Lauderdale.
- Resistance by residents to add bus stops.

Demographics

- Huge amount of poverty and it's growing quickly. Sixty-two percent of students in Indian River County School district are on the lunch program; in 2006-2008, the corresponding percent was 40%.

Infrastructure

- The County never finished the sewer or roads for the industrial areas.

Diversification of Industries

- Ag industry is vulnerable to blight/environmental conditions
- Economic diversity is weak.

Other Business Resources

- Lack of Venture Capital organization

Companies/Organizations That Have Left

- Dodgers left and aren't coming back.

Fiscal Stability

- Pension obligations at City of Vero Beach.

Misperceptions

- The biggest misperceptions about this county are that there is nothing to do for young people, or young families with kids.



Section 3.2.5: Stakeholder & Business Leader Input: Results: Opportunities

What are the biggest opportunities for growth in the region? *(continued)*

Looking further into Industry:

- Aqua culture industry
- Large industry
- Clean industry
- Light or clean industry depending upon the regulatory climate
- Bring in more industries
- Ecologically-focused industries, support research-development, tourism-expanding - existing, neighboring
- High-tech industries
- Small growth companies and industries
- Housing, service industries for increased retiree base; high-tech industries



Section 3.2.5: Stakeholder & Business Leader Input: Results: Opportunities

What are the biggest opportunities for growth in the region? (continued)

Following is additional input on the opportunities identified by the stakeholders/online survey participants, as well as additional opportunities that were elicited during the one-on-one interviews and focus groups. These are perceived opportunities and must be validated/confirmed.

Economic Development Goals/Suggestions for the Future

- “Create jobs to create wealth equitably across the county.”
- “Veterans and entrepreneurs are magic words with politicians and the public.”
- “We need to *define* who we are and *know* who we are.”
- Promote the region, engage existing businesses to help with this.
- Recommended businesses to attract:
 - High tech
 - Manufacturing
- Establish an ED Board of Directors. The County is the only organization that can get incentives. The Chamber cannot do this, it would also increase reaction time (speed).
- Share successes. Too often negative results dominate the conversation.
- Emphasize economic regionalism.
- Provide state credits for job growth.
- The Economic Development organization should get more press from good news.
- Help existing businesses by opening up communication, an outward facing approach.
- Set up and encourage local sourcing networks.
- The County should treat the cities as mini CRAs.
- In need of E.D. branding.
- Request to create ED Board of Directors.
- The Melbourne Airport renamed themselves the “Melbourne/Orlando Airport” offering seasonal flights for Canadians.
- Pro/Con: A lot of people perceive us as a wealthy retirement community.
- The County needs to decide what they want to be because in the past, they’ve promoted tourism, real estate, and quality of life. That’s why there are more realtors than bankers. I’m not saying which way is right or wrong, I’m just saying that it’s a decision that the county needs to decide or even strike more of a balance.
- We need more primary (manufacturing) jobs. We need to do more to attract higher-paying jobs among businesses that really create basic employment. Seventy percent of our county’s employment today is in the service sector.



Section 3.2.5: Stakeholder & Business Leader Input: Results: Opportunities

What are the biggest opportunities for growth in the region? *(continued)*

Infrastructure Improvements / Investment Announcements

- DOT may consider an interchange at I-95 and Oslo.
- For every four freight containers going south, only one comes back north full.
- FECR tracks go to Ft. Pierce, but there is not enough business there to warrant service. However, Ft. Pierce has an FTZ and the potential for fuel to come in on barge. Right now, all fuel comes in by the Everglades Port.
- Only one of Florida's 14 ports can do bulk loading. Having capabilities to do bulk loading could be huge. Other ports are offering value-added services such as fumigation (South Florida Logistics Center next to Miami) or product labeling for products being imported.
- FTZ is in Cape Canaveral. They need to change their charter to extend it to Indian River County. Has been in the works for at least a year, slow moving. Fort Pierce also has one that has turned out to be quite underutilized.
- FP&L has supposedly identified Okeechobee County for its next plant. This will mean jobs, too.
- Providing assisted living community (King from Sebastian is building one near Sebastian hospital and the FOA people are planning a \$30 million project in Fellsmere).
- Is the Panama Canal really going to increase port traffic in the Southeast? Is that an opportunity for us? Expansion of the Panama Canal will increase distribution opportunities.
- Healthcare
 - Huge opportunity for an elderly care facility
 - Billing
 - Bioresearch
- Agriculture:
 - Water Farming
 - Eucalyptus opportunity (5-6 year lead time)
- North part of the county is the "Silicon Valley of Aquaculture."



Section 3.2.5: Stakeholder & Business Leader Input: Results: Opportunities

What are the biggest opportunities for growth in the region? *(continued)*

Fellsmere Development

- Fellsmere just annexed 19,475 acres. It has a “consumptive use permit” for 35 billion gallons, the biggest in the state.
- The Headwaters project is the second largest restoration project in the world after the Everglades. This would include just under 20,000 housing units and about 6 million square feet of industrial. It will also have access to 30,000 acres of lake.
- Fellsmere is proposing that the County put in a new type of sewer system that would serve the new acreage and also prevent runoff from going into the harbor. Negotiation were underway during our on-site visit.

Natural Resources

- Water for industrial and agricultural uses.

Sports Tourism

- The Dodgers used to do their spring training there. They moved years ago, and now it’s called Historic Dodgertown. It’s used as a sports tourism draw. Underutilized? Option to leverage the sports medicine training facility?
- The Treasure Coast Sports Authority that brings in sports tourism.
 - North County Aquatic Pool
 - Dodger Field
 - The Shooting Range
 - Hobart Park – Treasure Coast World Series (In-State) was held there
 - There is a vast variety of fishing options, a combination of fresh water lakes (bass fishing), rivers, swamps and the ocean.
- Tens of thousands of acres of water available for recreational use, both inland and on the coast.



Section 3.2.5: Stakeholder & Business Leader Input: Results: Opportunities

What are the biggest opportunities for growth in the region? *(continued)*

Business Resources

- Enterprise Florida is getting better at helping land the deal.
- There is an organized group that supports entrepreneurship that has had some success. I believe this might be the Precipium group. Includes a business plan contest with cash and consulting as rewards to the winners.
- Manufacturing Institute is doing certifications for veterans.
- The South Florida Manufacturer's Association may be an underutilized resource: <http://sfma.org/>.
- Tap CEOs as mentors and ambassadors.
- The Florida Manufacturing Extension Partnership has a positive reputation. Now if they can come back into the light.
- Establish and promote professional networks
 - High tech breakfast
 - Manufacturing round table
- Education and training
 - Businesses requesting more support with training dollars
 - Explore programs involving UCF and FIT

Demographics

- Lots of people live here and work in Atlanta, New York, Miami, etc. for work.

Conservation Aspect in County

- Over 25% of the land in the county is covered by the St. John's Water Improvement District.

Regional Cooperation

- There is spirit of cooperation amongst the LEDOs in the multi-county region.



Section 3.2.6: Stakeholder & Business Leader Input: Results: Challenges/Barriers

What are the biggest challenges currently facing the region? *(continued)*

Looking further into the word Lack:

- Foreclosures, lack of opportunity for youth, City of Vero Beach electric rates, lack of sufficient upgrade in education, barrier island not pro-growth, citrus production decline due to disease and foreign competition.
- Lack of high-paying jobs; slow environmental deregulation.
- High barriers to entry, lack of education, skilled labor integration.
- Lack of leadership
- Lack of awareness, being on the radar
- Lack of vision (county); Lack of leadership (county);
- Lack of industry or large companies
- Lack of adequate densities in urban service boundary, anti-growth sentiment
- Lack of economic development fund to compete with big guys



Section 3.2.6: Stakeholder & Business Leader Input: Results: Challenges/Barriers

What are the biggest challenges currently facing the region? *(continued)*

Looking further into the word County:

- Division and in-fighting, need for county-wide economic development, goals, objective and strategy
- It's small; insufficient workforce in the county; No major university or airport
- Perceived struggle between Vero and county, particularly City of Vero utilities
- Perception of our county - "zero beach" retirement community
- Lack of vision (county); Lack of leadership (county); leaders (county)
- Cohesive interaction between municipalities and county government



Section 3.2.6: Stakeholder & Business Leader Input: Results: Challenges/Barriers

What are the biggest challenges currently facing the region? *(continued)*

Following is additional input on the challenges/barriers identified by the stakeholders/online survey participants, as well as additional challenges/barriers that were elicited during the one-on-one interviews and focus groups. These are perceived challenges/barriers and must be validated/ confirmed.

Lack of OEM Businesses

- In the four county region, there are great clusters of companies such as CVS/distribution, life sciences, and biomedical. But not really OEM business – Triumph makes parts for Embraer/Boeing, but that’s about it. Piper makes almost all of its own components.

Lack of Room to Grow

- Both Vero Beach and Sebastian have little if any significant room to grow, with the exception of their respective airports.
- The Florida Scrub Jay has essentially limited the amount of industrial land available, especially up in Sebastian along 512.
- Some companies are land locked.

Training/Recruitment for Higher Skill Levels

- Doesn’t believe IRSC has the ability to train students with higher skills needs.
- Someone else said that perhaps the workforce itself is not capable of being trained at a higher level.
- Scientists are hard to recruit.
- Florida schools are near the bottom nationally in terms of dollars spent per student.

Lack of Infrastructure to Support Growth

- No unified sewer district.
- New spurs are needed for some companies.
- GoLine (free busing) is limited and doesn’t go everywhere
- Lack of (communications) fiber.

Economic Base

- Generationally, this region has never been manufacturing heavy. Piper is a happy exception.
- Declining agriculture.



Section 3.2.6: Stakeholder & Business Leader Input: Results: Challenges/Barriers

What are the biggest challenges currently facing the region? *(continued)*

Competitiveness Relative to Neighboring Counties

- When projects come to the region, St. Lucie and Brevard can both offer more incentives. Example: Torrey Pines.
- Limited tax base in Indian River County relative to other counties.
- Brevard County is very competitive. Southern counties are also.
- Workers commute freely between counties, the county lines are not relevant to them.

Enterprise Zone Set to Expire

- Enterprise Zone is set to expire in 2015. Working with Enterprise Florida to extend it. It seems likely. One of 62 in the state of Florida, and the only one in Indian River County.

Weather

- The county had two hurricanes back to back in 2004, which was very disruptive. In 2005, Hurricane Wilma came through but there was relatively little damage.



Section 3.2.7: Stakeholder & Business Leader Input: Results: Target Industries

What industries or clusters do you think the region is, or could be competitive in? *(continued)*

Many of the interviews and focus groups participants shared input on industries that were core to the Indian River County economy, as well as identified some prospective or emerging industries for consideration. This will be used as one source of input into our evaluation and assessment of Indian River County's target industries. Note that our focus is on industrial, not retail or commercial, opportunities.

Existing Business/Industries

- On the agriculture side, first it was pineapples, then sugar cane, then citrus. Citrus used to be huge but recent disease is killing not just the fruit but the trees and is not readily curable. It's creating a serious crisis for the grove owners and packers on the west side of the county.
 - Citrus packers that have closed or are planning to close:
 - Harbor Island
 - Graves Brothers
 - Kennedy
 - Citrus packers that are still open:
 - Sun Ag
 - Green River
 - Riverfront
 - Quality
 - IMG Citrus
 - Oslo Citrus
 - Indian River Exchange
 - Premier Citrus
 - There used to be cooperatives, but in recent years, no longer the set up.
- Citrus “used to keep all other industry out” to prevent competition for labor.
- Citrus is very seasonal, obviously.
- About half of what is picked is suitable for packing fresh which provides a higher margin. The ones that are misshapen, too big, too small, or with blemishes are sold to juicers. So the farmers actually make more on fresh than on processed product.
- Some are trying to promote converting the citrus groves to “water farming.” Basically, storing water on their land, which obviously gets pretty soggy, instead of dumping it into the harbor.
- Another potential crop that has been floated is peaches. Some are asking how elastic will that demand be? How will prices stay high enough if supply increases?
- Eucalyptus farming was mentioned as an option. They require 5-7 years until mature.



Section 3.2.7: Stakeholder & Business Leader Input: Results: Target Industries

What industries or clusters do you think the region is, or could be competitive in? *(continued)*

Existing Business/Industries *(continued)*

- Piper Aviation
- Florida Organic Agriculture is a recent success:
 - Shrimp aquaculture
 - \$16 million initial project
 - Off limits to tours because of bio threat – could ruin a whole batch
 - Has a 2,500' well to give it access to salt water
 - Sold initially to restaurants up and down the coast, which is a 3-4 day window for fresh seafood.
 - Next level of operation will be the feed for the shrimp.
 - Moved to Fellsmere after a call from Jason Nunemaker.
 - Is also using the EB-5 program.
- INEOS is the waste to energy plant located where the former Ocean Spray cranberry juice plant was
 - \$130 million investment
 - Supported with a USDA loan as well as a US DOE grant
 - Supposedly the key driver to their choice of location is that there was a pre-permitted EPA deep water well.
- Triton Submarines makes personal submersibles. They run for \$1 million and up, and hold between 1-3 people for depths of up to a couple thousand feet. They have an agreement with Piper for supply chain.
- Tim Girard is in a recycled packing house, hires locally, he's the best model of what we should try for more of.
- National Elephant Center fosters care for 70 zoos worldwide.
- Syngenta is based in Switzerland. Does tests on grass.
- Sometimes have visitors from HQ who stay in a local hotel for up to six months.
- PCP makes ammo cartridges with plastic shell casings. They sell to the military and were also one of the sponsors for the big shooting event that just took place. Their current facility is about 6,400 sf.



Section 3.2.7: Stakeholder & Business Leader Input: Results: Target Industries

What industries or clusters do you think the region is, or could be competitive in? *(continued)*

Existing Business/Industries *(continued)*

- CVS announced in 2004 and opened in 2006.
 - Was a big controversy, in part because of ceiling heights. The entire county now has a height limit of 35'. The County basically granted them a variance for any building that happened to be located west of I-95 and north of SR 60.
 - I think their ceiling limit is 65'. They have two stories inside.
- Naitique Distribution
- NetBoss is in Liberty Park on the way to Fellsmere
- Next Level Security Systems
 - From California
 - Taxes were a driver
- Dairy and cattle are huge.
- Most manufacturers are smaller, less than 25 people.
- We have some very good companies that are 30, 40, 50 employees. They don't make the headlines. But they are a very good fit for us.
- Indian River Bank had its Op Center in Toby's building, also. There is fiber to that building. But they recently moved it out.
- Power plant technology.
- There is a company in town that offers EAP assistance (like a call center) to corporations around the country. Believe they located in Vero Beach because that's where owner wanted to be.
- AOL started in IRC



Section 3.2.7: Stakeholder & Business Leader Input: Results: Target Industries

What industries or clusters do you think the region is, or could be competitive in? *(continued)*

Nearby Relocations/Expansions/Businesses

- There are breweries nearby – Ft. Pierce – but none there. Some have looked.
- A company called Patriot Pickle looked at the old Kennedy citrus packing plant.
- Amazon announced recently somewhere near Tampa
- Walmart has a DC in St. Lucie County.
- SOBE started in Vero Beach
- Martin County has a fairly robust Marine business.
- Torrey Pines and VGTI, both of which located in St. Lucie County.
- A regional partner said, “The life sciences, biomedical research are real big. But nobody knows about it. And they are really quality companies that are starting to expand. It’s the same in Indian River County, but it’s all kind of under the radar.”

Suggestions for New/Emerging Target Industries

- Environmental areas
- There may be opportunities to find businesses related to the Vero Beach High School’s Environmental Technology Program. This program addresses land resources and management; water resources and management; waste management; alternative energies; ecosystem studies; protected species studies; aquaculture; hydroponics; and more. Some of the class activities have included: participating in a prescribed burn; raising fish, snails, and alligators; growing a variety of plants, managing waste to make energy, turning used cooking oil into biodiesel, and more.
- Medical devices for an aging population
- Golf course maintenance (IRSC’s ag programs focus on landscaping)
- Airport-based businesses as well as those serving the marine industry
- High Tech
- Bio-tech
- Medical Services
- Software Services
- Distribution centers
- Aquaculture. There is growing international interest in U.S. aquaculture.
- Education such as Florida Institute of Technology. They would love to have a campus there.



Section 3.2.7: Stakeholder & Business Leader Input: Results: Target Industries

What industries or clusters do you think the region is, or could be competitive in? *(continued)*

Suggestions for New/Emerging Target Industries *(continued)*

- Anything military would be good:
 - Veterans Council
 - Navy Seal Museum
 - Memorial Island
 - Military store at mall
- There is an aquatics center between Fellsmere and Sebastian. Could this support something in sports medicine or related?
- Eco-tourism based on the large amount of land that is environmentally protected, plus the coast?
- Companies of \leq to 100 employees.
- Environment is big with the lagoon, fishing, beach, water sports, hunting, etc.
- Clean assembly and production
- Fisheries – consumption of fish or ornamentals
- Ornamental agriculture and botany
- A developer in Sebastian is working on an assisted living facility in Sebastian near the hospital. The aquaculture guys are planning to develop one in Fellsmere (\$30 million).
- The colleges could teach students how to apply simulation technologies in fields like advertising, medical uses, etc. to help us develop a niche here.
- Duke has two investments in the region. Why not more, such as Duke Weight Loss, or Duke Sports Medicine?
- Aerospace:
 - Piper located there
 - Sikorski located an hour away
 - Triumph Aerospace is South
 - Northern Melbourne: Embraer
- There is a company that is exploring removing nitrates from water (e.g., before going into the lagoon) using ultrafiltration.
- Pharmaceuticals.
- Boat trailers (building on trailer experience combined with Indian River Lagoon).



Section 4: Sites and Buildings Assessment

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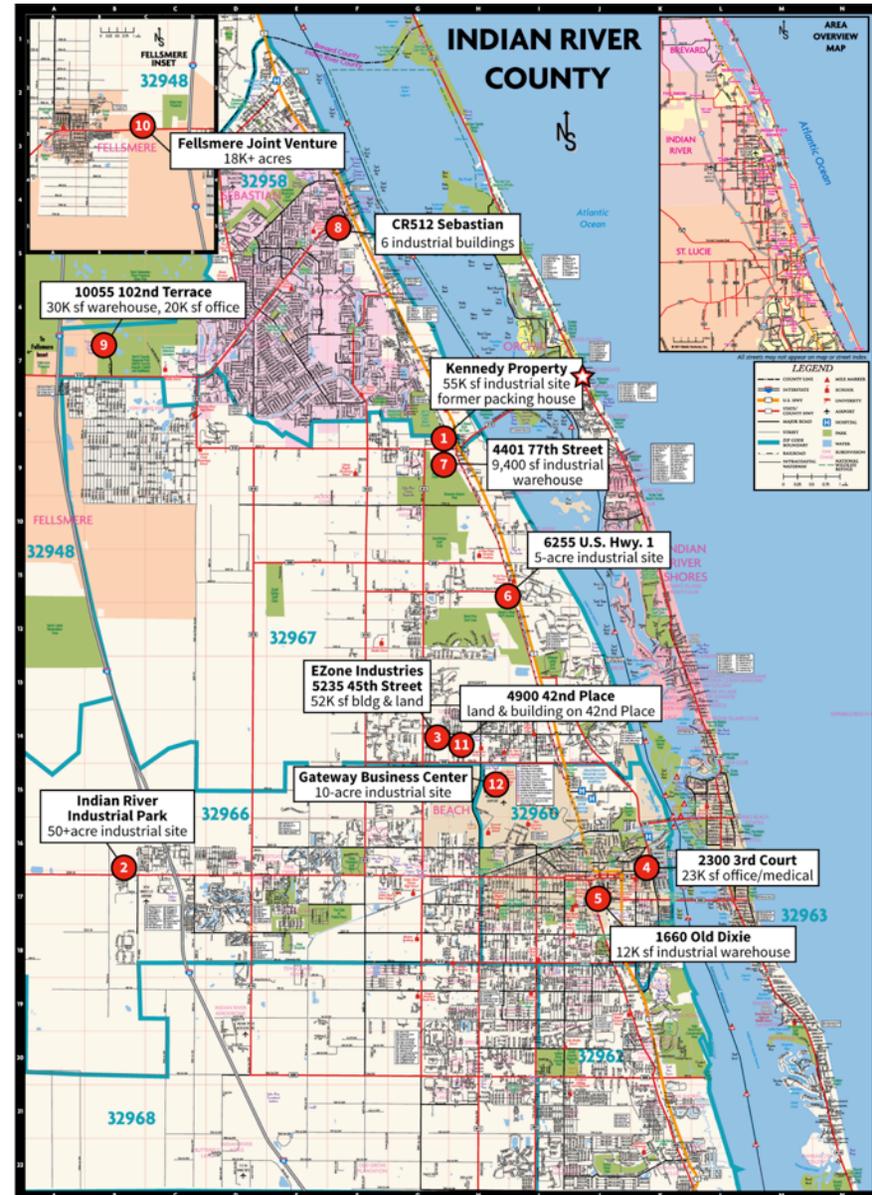
Section 4.1: Sites & Buildings Assessment: Overview

Overview

During the site visit the week of July 14th, 2014, the consulting team spent time in the county visiting available sites and buildings. The Chamber selected the properties to show the team based on the county's best industrial inventory.

Number ¹	Property Name
1 (B)	Kennedy Property, Vero Beach
2 (S)	Indian River Park of Commerce (I-95 and SR60), Vero Beach
3 (B)	5235 45 th Street, EZone Industries, Vero Beach
4 (B)	2300 3 rd Court, Vero Beach
5 (B)	1660 Old Dixie, Vero Beach
6 (S)	6255 U.S. Hwy. 1, Vero Beach
7 (B)	4401 77 th Street, Vero Beach
8 (B)	Six Industrial Buildings on CR512, Sebastian
9 (B)	10055 102 nd Terrace (Macho Building), Sebastian
10 (S)	Fellsmere Joint Venture, Fellsmere
11 (B)	4900 42 nd Place, Vero Beach
12 (B)	Gateway Business Center, near 42st Street and 43 rd Avenue

¹In order viewed. (B) = Building. (S) = Site.





Section 4.1: Sites & Buildings Assessment: Overview

Listing of Properties

We toured 12 properties: nine had buildings (B), and three were sites (S). They are listed below in the order shown.

Number ¹	Property Name	Brief Description
1 (B)	Kennedy Property, Vero Beach	17 acre tract with former citrus packing house
2 (S)	Indian River Park of Commerce (I-95 and SR60), Vero Beach	Approximately 65 acres immediately south of CVS
3 (B)	5235 45 th Street, EZone Industries, Vero Beach	About 10 acres, a former truss manufacturing location with 52,000 square feet of building, some of which is office and some of which is covered work space.
4 (B)	2300 3 rd Court, Vero Beach	5,000 – 23,000 square foot medical building, for sale or rent. Two story. In downtown Vero Beach.
5 (B)	1660 Old Dixie, Vero Beach	Approximately 12,500 square foot former roofing company. Office plus warehouse.
6 (S)	6255 U.S. Hwy. 1, Vero Beach	Approximately 5 acre parcel on U.S. Hwy. 1, high visibility. Selling price is \$1.2 million which includes approximately \$1 million in site improvements, including drainage improvements, water and sewer impact fees, traffic impact fees, and all engineering, plans, and permitting paid.
7 (B)	4401 77 th Street, Vero Beach	Approximately 9,500 square foot industrial building, with ground level bay door and 20'-22' ceilings.
8 (B)	Six Industrial Buildings on CR512, Sebastian	Each building has multiple units. Building 1 is about 8,000 sf; Building 2 is about 5,000 sf; Building 3 is about 6,450 sf; Buildings 4-6 are each 4,000 sf for about 31,450 sf total.
9 (B)	10055 102 nd Terrace (Macho Building), Sebastian	50,000 sf total, of which 30,000 sf is warehouse space rented through November 2018 and 20,000 is office space. Ceiling heights approximately 30'. Also showed us an additional 10 acre industrial site in the vicinity.
10 (S)	Fellsmere Joint Venture, Fellsmere	19,500 acres available for commercial, industrial, agricultural and recreational uses. Some buildings, such as aquaculture and elephant operations, but primarily sites.
11 (B)	4900 42 nd Place, Vero Beach	30,800 sf industrial warehouse /office plus four additional lots totaling about 5 acres. Located in Enterprise Zone and HUB Zone. Currently the home of a window and door maker (Vero Millwork).
12 (B)	Gateway Business Center, near 42 st Street and 43 rd Avenue	Thirteen office/warehouse spaces ranging from 1,182 sf to 5,218 sf, some of which are already leased.

¹In order viewed. (B) = Building. (S) = Site.



Section 4.1: Sites & Buildings Assessment: Overview

Online Listing of Properties

These sites and buildings can be found online in the state-wide and county-level databases of available properties:

Number ¹	Property Name	Listed on Florida State website www.enterpriseflorida.com/find-properties	Listed on Indian River County website www.indianriversites.com/
1 (B)	Kennedy Property, Vero Beach		
2 (S)	Indian River Park of Commerce (I-95 and SR60), Vero Beach		
3 (B)	5235 45 th Street, EZone Industries, Vero Beach		
4 (B)	2300 3 rd Court, Vero Beach		
5 (B)	1660 Old Dixie, Vero Beach		
6 (S)	6255 U.S. Hwy. 1, Vero Beach		
7 (B)	4401 77 th Street, Vero Beach		
8 (B)	Six Industrial Buildings on CR512, Sebastian		
9 (B)	10055 102 nd Terrace (Macho Building), Sebastian		
10 (S)	Fellsmere Joint Venture, Fellsmere		
11 (B)	4900 42 nd Place, Vero Beach		
12 (B)	Gateway Business Center, near 42 st Street and 43 rd Avenue		

¹In order viewed. (B) = Building. (S) = Site.



Section 4.2: Sites & Buildings Assessment: Overall Observations and Recommendations

Overall Observations and Recommendations

Site visits are an important step in the Site Selection process. By the time a site visit occurs, your community has essentially made the “short list” of a search assignment. As part of this project, the consulting team spent approximately one-and-a-half days touring the county’s best industrial sites.

The observations and recommendations below include suggestions for improving the site visit process as well as top-line commentary on the readiness of each property, organized by county:

1. Every site visit should start with an overview of the region. This should be at least the county level, but the four-county region would also be helpful. Ady was provided with a packet with most of this basic information, such as labor shed, major private-sector employers, and incentives. This packet needs to be beefed up with more maps, numbers for the whole region and Indian River County, and information on education; training programs and other resources.
2. This initial meeting should also feature a map of the region showing industrial parks and key economic assets (ports, rail yards, airports, etc.). The ED team provided an excellent, detailed map with each property marked and readily provided an overview of the county in terms of assets.
3. We checked the Enterprise Florida website to see if the properties we visited had been entered into the statewide database, and only seven had been. That’s very important, as our search often begins at the state level.
 - On a related note, the Indian River County economic development website should also include property listings, even if it just featured properties with a link to the state’s listing information. Seven of the 12 properties were shown (see previous page)
4. Information on each property was inconsistent. We were given at least one handout on each property. Property listing information needs to be more completely filled out, especially information about utility capacity and building characteristics. (see Appendix)
5. It is interesting that all of the buildings are owned by private parties or by developers, and that none are owned by the County or Chamber/EDC. In many locations, these types of entities take the lead in developing industrial and business parks.
 - Fellsmere and the opportunity its development presents are remarkable on a national comparison basis. The planning and work that has gone into the Villages of Fellsmere and into eco-development have the potential to shape the County for many years to come. Note that portions of this development do not yet have fully realized infrastructure.
 - Some barriers to the creation of new industrial sites and buildings include infrastructure challenges in Fellsmere such as: roads, water and sewer. This includes a planned, but not yet built, I-95 interchange.
 - The site by CVS (#2) was a star. Very good location and very professionally represented in terms of engineering / site development drawings, schematics, and extensive blueprints and plans for the Indian River Park of Commerce.
 - Based on the buildings toured, there did appear to be some very good options in a range of sizes from a couple thousand square feet to 50,000 square feet.

Note of clarification: Properties less than 10 acres or buildings less than 10,000 sf are not automatically uploaded to, or listed on, EFI’s property search website. Though property owners and brokers are encouraged to list sites/buildings on the indianriversites.com website, it is up to those organizations to do so.



Section 5: The Indian River County Economy

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Section 5.1: The Indian River County Economy: Core Economic Assets

Introduction

Asset mapping is the process of identifying a county's competitive strengths and weaknesses relative to their importance in a business decision. Every business that makes a decision to relocate, expand or consolidate does so based on a set of location factors which they determine are important to their operations – labor, infrastructure, costs, etc. In each industry these factors change, or are weighted differently. Understanding how competitive a region or county is in those same factors will determine what their core assets are for each target industry and, by extension, what its value proposition is to businesses considering investment.

Conducting the Analysis

The process of asset mapping starts by identifying all of the location factors that matter to each of the major target industries. These factors are based on past experience conducting site selection studies. In addition to the target industries, more generic business conditions and business cost factors were also identified.

With the factors identified, quantitative and qualitative data was gathered for each that compared the county to the region, the state of Florida and surrounding states, as well as the nation as a whole. This comparison helps place the competitiveness of the county.

Based on the data and importance of each factor, 2x2 asset maps were developed which array all of the variables in an easy to interpret graphic.

Interpreting the Results

There are asset maps on the following pages for general business costs and general business conditions. The X-axis reflects how competitive Indian River County is in each of the factors (the further right the value the more competitive the factor). The Y-axis reflects how important that factor is to a business decision (the higher the value the more important the factor). Therefore, the upper right quadrant, representing competitive and important, reflects the core of the county's assets and the base for competitive positioning.

Vertical arrows attached to a factor represent the variability in how important that factor is to business decisions based on the industry the business is in. For example, water availability is more important to a food processing business than an office operations business. The horizontal lines attached to a factor represent the variability in how competitive Indian River County is. This could be due to locational differences (e.g., Vero Beach electrical rates) or differences in the factor itself (e.g., varying availability of labor across specific skill sets).

Each of the asset maps are accompanied by some comments and further explanation. Following the asset maps is a detailed discussion on competitiveness based on the following general categories of assets:

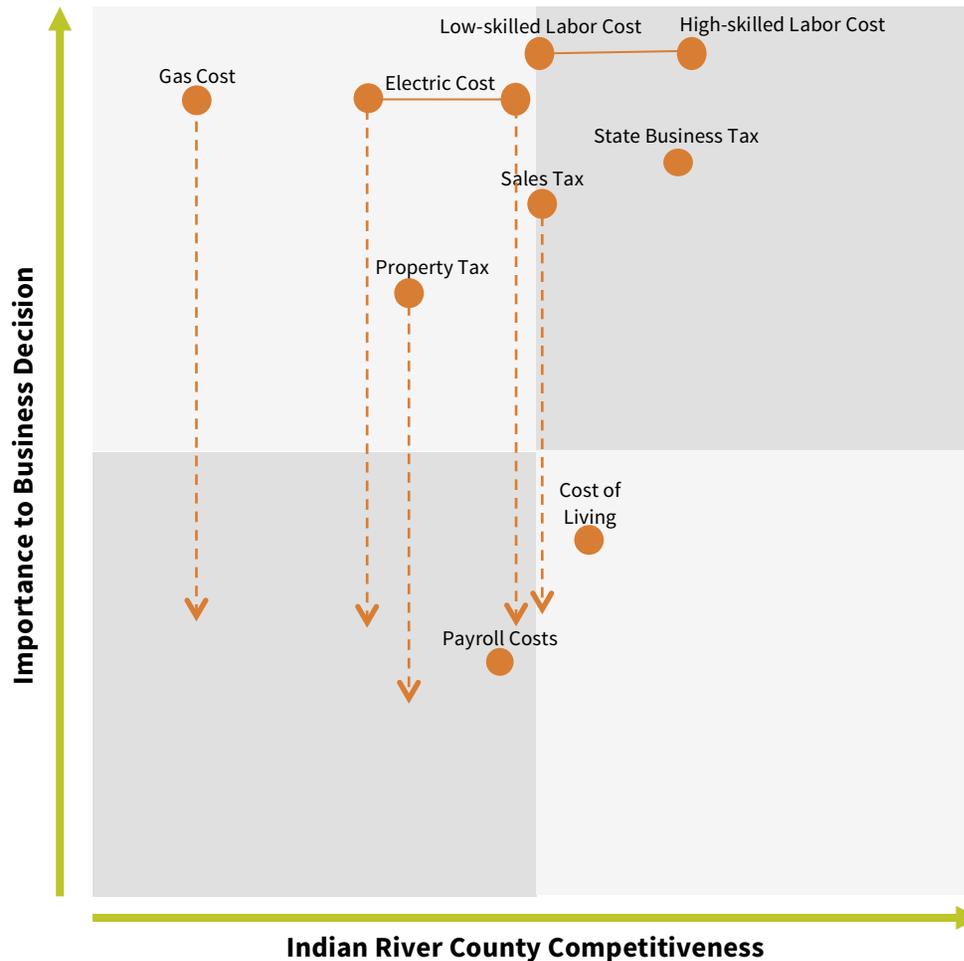
- Labor and Talent
- Infrastructure
- Regulation
- Taxes and Other Costs



Section 5.1: The Indian River County Economy: Core Economic Assets

General Business Costs Asset Map

The asset map below depicts Indian River County’s competitiveness compared to the state of Florida, Georgia, Alabama, and the United States as a whole.



The X-axis reflects how competitive Indian River County is in each of the factors (the further right the value the more competitive the factor). The Y-axis reflects how important that factor is to a business decision (the higher the value the more important the factor). Therefore, the upper right quadrant, representing competitive and important, reflects the core of the county’s assets and the base for competitive positioning.

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Section 5.1: The Indian River County Economy: Core Economic Assets

General Business Costs Asset Map Comments

- Labor costs in Florida fall below the national average in three main categories: Low Skilled (5% below the national average), Skilled/Advanced (13% below), and Professional/Technical (8% below). However, Low Skilled labor costs are on par with the surrounding states.
- Florida has higher taxes than its neighboring states, with a ranking of 19 for Mature Firms and 36 for New Firms.¹ However, Florida is rated as the 5th best in terms of state business tax climate.²
- Millage rates in the county are some of the lowest in the state and there are also reduced impact fees for some industries that have been in effect since May within the county.
- Sales tax rated as 19th highest in the nation; it is two percentage points higher in Florida, at 6%, than in Alabama or Georgia, both at 4%. However, when combined with average local sales tax rates Florida rates 29th highest.²
- Florida property taxes are rated as 15th highest in the nation (per capita); \$411 higher than the Georgia and \$968 higher than Alabama.²
- Florida unemployment tax percentage is on par with the surrounding states; however, the Workers' Compensation rate is slightly lower than its neighbors and \$0.22 (per \$100/payroll) lower than the national average.
- The unionization rate is 5.4%, which is 5.9% lower than the national average; however, Georgia shows a slightly lower unionization rate than Florida. Alabama's rate is almost twice that of Florida.
- The electric and gas rates in Florida are much higher than surrounding states; \$1.42 kWh higher for electric and \$1.63 per 1000 cubic feet higher for gas.
- The cost of living in Indian River County is almost 4% higher than the 4-County region, but approximately 3% lower than Florida. Both Georgia and Alabama have a lower cost of living.

1. *Location Matters: A Comparative Analysis of State Tax Costs on Business. The Tax Foundation with KPMG. 2012.*

2. Tax Foundation: "Facts & Figures" 2013



Section 5.1: The Indian River County Economy: Core Economic Assets

Table 4.3: Select Supporting Data for Business Costs Asset Map

Table 4.3: Select Supporting Data for Business Costs Asset Map	Indian River County	Indian River 4-County Region	State of Florida	State of Georgia	State of Alabama	United States
Avg. Low Skilled Labor Costs ¹			\$32,070	\$31,520	\$32,970	\$34,930
Avg. Skilled/Advanced Labor Costs ¹			\$66,965	\$72,515	\$63,080	\$75,560
Avg. Professional Technical Labor Cost ¹			\$70,850	\$71,515	\$63,080	\$74,740
Tax Burden Ranking – Mature Firm ²			19	3	13	
Tax Burden Ranking – New Firm ²			36	6	19	
Payroll Costs – Unemployment Tax ³ (New Employer Base Payroll Base)			2.70% \$8,000	2.62% \$9,500	2.70% \$8,000	
Payroll Costs – Workers Comp. ⁴ (State Rank Avg. Rate per \$100 of payroll)			29 \$1.82	27 \$1.88	21 \$1.97	N/A \$2.04
Cost of Living ⁵ (National Average = 100)	96	92.5	99	92	90	100

Sources:

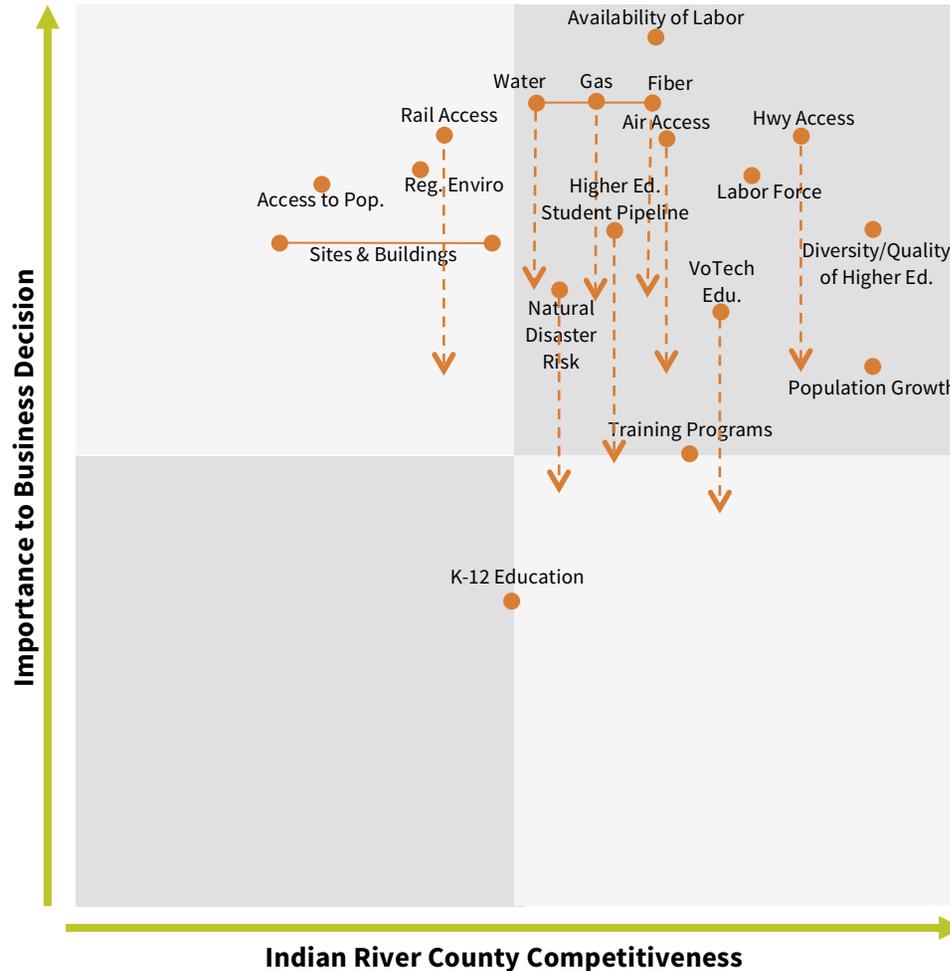
1. Bureau of Labor Statistics, *Ady Voldedge* (Data from 2012)
2. *Location Matters: A Comparative Analysis of State Tax Costs on Business*. The Tax Foundation with KPMG. 2012.
3. Tax Policy Center (2013)
4. Oregon Workers' Compensation Premium Rate Ranking Summary (2012)
5. *Sperling's Best Places* (2013)



Section 5.1: The Indian River County Economy: Core Economic Assets

General Conditions Asset Map

The asset map below depicts Indian River County's competitiveness compared to the state of Florida, Georgia, Alabama, and the United States as a whole.



The X-axis reflects how competitive Indian River County is in each of the factors (the further right the value the more competitive the factor). The Y-axis reflects how important that factor is to a business decision (the higher the value the more important the factor). Therefore, the upper right quadrant, representing competitive and important, reflects the core of the county's assets and the base for competitive positioning.

Vertical arrows attached to a factor represent the variability in how important that factor is to business decisions based on the industry the business is in. For example, water availability is more important to a food processing business than an office operations business. The horizontal lines attached to a factor represent the variability in how competitive Indian River County is. This could be due to locational differences (e.g., Vero Beach electrical rates) or differences in the factor itself (e.g., varying availability of labor across specific skill sets).



Section 5.1: The Indian River County Economy: Core Economic Assets

General Conditions Asset Map Comments

- The county has two general aviation airports, however access to the nearest major airport is roughly 90-minutes away.
- The largest natural disaster risk to the area is hurricanes. However, the Indian River region is fairly safe with limited risk.
- K-12 educational performance seems to be similar to other areas in the region. Local high school college readiness scores fall below or at average with state scores, as do math scores. Reading scores are average or above. Charter schools reflect higher scores on average. The educational attainment is on par with the state and the nation.
- Indian River State College was recently (September 4th, 2014) named one of the top 10 community colleges in the nation according to Aspen Institute.
- With an older population and several universities in the area, there is ample availability of white-collar workers in the area. In fact, one estimate was 62% of county workforce is white collar.
- Availability of sites and buildings is limited, although there are a few “A” properties.
- Philanthropic activity within Indian River County is seen as well above average compared to other communities. Some of the organizations leading the charge are Indian River Community Foundation, Indian River Impact 100, Association of Fundraising Professionals, and the Education Foundation among several others.



Section 5.1: The Indian River County Economy: Core Economic Assets

Table 4.4: Select Supporting Data for Business Conditions Asset Map

Table 4.4: Select Supporting Data for Business Conditions Asset Map	Indian River County	Indian River 4-County Region	State of Florida	State of Georgia	State of Alabama	United States
Labor Force ¹	62,148	471,252	9,328,439	4,844,814	2,265,008	157,664,331
Population Growth ² (Since 2000)	25.7%	31.5%	22.3%	22.1%	8.7%	9.70%
Labor Force Growth ³ (10 year Change)	12.7%	17.5%	14.8%	8.8%	1.6%	6.1%
Access to Population ⁴ (Population within 500 Miles)	34,733,117					
Population with High School Degree ⁵	86.7%	87.3%	85.8%	84.4%	82.6%	85.70%
Population with 2-Year Degree ⁵	8.4%	9.4%	8.7%	6.8%	7.2%	7.70%
Population with 4-Year Degree ⁵	16.7%	14.8%	16.8%	17.7%	14.2%	17.90%
Population with Graduate Degree ⁵	10.2%	8.8%	9.40%	10.1%	8.1%	10.60%

Sources:

1. Stats America, United States Census Bureau
2. Stats America, United States Census Bureau
3. Stats America, United States Census Bureau
4. Stats America, United States Census Bureau
5. United States Census Bureau



Section 5.2: The Indian River County Economy: The Business Environment

Labor and Talent

Availability of Low Skilled Labor		There are a lot of low-skilled service and seasonal jobs in the county. Citrus industry issues are starting to ripple through.
Availability of Semi Skilled/Skilled Labor		Availability is low. Some employers are “training their own” from unskilled workers.
Availability of Professional/Technical Labor		While there are many transplanted business owners, finding professional/technical staff can be difficult.
Training Programs		Indian River has a couple strong local training grants as well as a few strong state and federal grants/incentives such as On-the-Job Training Grants, Employed Worker Training Grants, Quick Response Training, and Incumbent Worker Training Grants. Great training and educational providers such as Career Source Research Coast and Indian River State College also increase the area’s viability. Indian River State College also has a small incubator at their main campus in Fort Pierce, which has enough room for about seven to eight entrepreneurs.
Education		There are no higher (bachelors and up) programs in the county. Indian River State College (IRSC) does offer bachelor degree programs through its main campus at Fort Pierce and was recently named a top ten community college in the nation by Aspen Institute. IRSC’s Mueller campus is located within Indian River County, Vero Beach, offering several specialty programs, career training, customized business training, and more. At the high school level, Indian River School District ranks 11 th in the state for combined ACT score (20.4) and 18 th in the state for mean SAT score (1519) out of 67 total school districts.

	Marginally Competitive		Marginally Disadvantaged		Neutral
	Competitive		Disadvantaged		
	Very Competitive		Significantly Disadvantaged		



Section 5.2: The Indian River County Economy: The Business Environment

Infrastructure

Highway		The roads and highways in Indian River County are very well kept and offer access fairly quickly to most of the state. However, access to other major metropolitan areas in the U.S. is limited due to the state's geography. The four major highways in the county are Interstate 95, Highway 1, Highway 60, and the Florida Turnpike. Interstate 95 is the biggest positive for businesses in the county as it connects Indian River to several metropolitan areas on the east coast including Miami, Jacksonville, Richmond, Washington D.C., Philadelphia, New York, and Boston.
Rail		CSX is the only major rail service provider south of Jacksonville. Unfortunately it does not pass through Indian River County. However, Class II railway, Florida East Coast, runs up and down the east coast of Florida from Jacksonville to Miami going through Indian River County.
Air		In short, the county has two general aviation airports, however access to the nearest major commercial airport (Orlando) is roughly 90-minutes away.
Port		There are several major ports along the eastern side of Florida's coast easily accessible to businesses within Indian River County. Port Canaveral is the nearest major port and is known primarily for its cruise ships. However, Port Canaveral is also designated as a foreign trade zone and has direct access to the Atlantic Ocean as well as Canada, South America, Europe, Africa, and Asia.
Utilities		All the cities have adequate electric, gas, water, and sewer. The City of Vero Beach is exploring options for less expensive electrical service, although it has a long-term contract with its current provider. Fellsmere's development requires a solution to sewer access. Electric rates are high within Vero Beach. Outside of the Vero Beach Electric Service Area, electric rates are on par with the state and slightly below the national average.

	Marginally Competitive		Marginally Disadvantaged	
	Competitive		Disadvantaged	Neutral
	Very Competitive		Significantly Disadvantaged	



Section 5.2: The Indian River County Economy: The Business Environment

Regulation & Incentives

State Regulatory & Permitting	--	The State of Florida is known for regulatory hurdles, especially environmental permitting requirements.
Local Regulatory & Permitting	-	Difficulty of permitting varies by community. There is a perception that the County is difficult to work with and that the County Fire Department drags its feet on city projects. However, depending on the project, building permit applications and complete site plan applications could be reviewed concurrently in as little as two weeks.
State Incentives	★★	State Training Grants such as the Quick Response Training Grants and Incumbent Worker Training Grants are seen as beneficial. The ability to offer a Quick Action Closing Fund (QACF) is also seen as an advantage for the state.
Local Incentives	★	Local Training Grant programs (e.g., On-the-Job Training and Employed Worker Training), Local Jobs Grant program, Enterprise Zone, and HUB Zone are important draws for some businesses. The County has discretion over many incentives, which can be good when priorities are agreed upon.

★	Marginally Competitive	-	Marginally Disadvantaged	
★★	Competitive	--	Disadvantaged	○ Neutral
★★★	Very Competitive	---	Significantly Disadvantaged	



Section 5.2: The Indian River County Economy: The Business Environment

Key Local Incentives

Important incentives offered by Indian River County are as follows:

Local Jobs Grant Program: The program offers eligible “targeted” businesses financial incentives for creating new higher-wage jobs within the County and maintaining those jobs over multiple years. After the jobs are in place for one year the grant is paid over a three-year period in phases. It mirrors the state's Qualified Target Industry Tax Refund (QTI) program and can be used as the match requirement for QTI.

On-the-Job Training Grants: Offers the potential to train new employees on-the-job while being reimbursed up to 90 percent of their wages.

Employed Worker Training Grants: Offers the opportunity to reimburse half of a business’s costs associated with training current employees to upgrade their skills. Training must lead to a national recognized credential.

Tax Abatement: This program offers certain businesses the opportunity to have their property and tangible taxes "frozen" for a set period of time, up to ten years, depending on the number of jobs and capital investment of the project, then phased in to current taxable amount. This does not affect property taxes collected for schools.

Enterprise Zone: The program offers certain tax benefits and incentives to businesses located within the designated enterprise zones. The Indian River County/City of Vero Beach Enterprise Zone encompasses all of the Vero Beach Municipal Airport and the adjacent Gifford community. Some of the tax benefits and incentives offered to qualifying businesses in the Indian River County/City of Vero Beach Enterprise Zone are as follows:

- Jobs Tax Credit on Florida Sales Tax, which allows for a sales and use tax credit for 20 or 30 percent of wages paid to new employees who reside within an enterprise zone. This cannot be used in conjunction with the Jobs Tax Credit on Corporate Income Tax.
- Jobs Tax Credit on Corporate Income Tax, which allows for a corporate income tax credit for 15 or 20 percent of wages paid to new employees who reside within an enterprise zone. This cannot be used in conjunction with the Jobs Tax Credit on Florida Sales Tax.
- Business Equipment Sales Tax Refund, which allows for a refund for state sales taxes paid on the purchase of certain business property used exclusively in an enterprise zone for at least three years.
- Building Materials Sales Tax Refund, which allows for a refund for state sales taxes paid on the purchase of building materials used in new construction or renovations of residential, commercial or industrial property in an enterprise zone.
- Property Tax Credit on Corporate Income Tax, which allows credits to be used against a business’s Florida corporate income tax equal to 96 percent of ad valorem taxes paid on the new or improved property.
- Municipal Utility Tax Exemption on Electricity, which allows businesses to be eligible for a 50 percent exemption on the municipal tax on electricity.
- Community Contribution Tax Credit, which allows businesses a 50 percent tax credit on Florida corporate income tax, insurance premium tax, or sales tax refund for donations made to local community development projects. Businesses are not required to be located in an enterprise zone to be eligible.
- Indian River County offers a 10 percent Local Jobs Grant Bonus for companies locating in the Enterprise Zone.

In addition to these incentives the County can also waive county utility deposits and offer the opportunity to finance county impact fees when appropriate.



Section 5.2: The Indian River County Economy: The Business Environment

Key Statewide Incentives

There are numerous incentives available from multiple agencies within the State of Florida. The purpose of this listing is not to attempt to provide an exhaustive list, but rather, to identify the key incentives that have historically been important in retaining and attracting businesses.

The following state incentives are offered through Indian River County:

Capital Investment Tax Credit: This tax credit is used to attract and grow capital-intensive industries in Florida and provides annual corporate income tax credit of up to 100 percent of investment issued in installments over a 20 year period.

Sales Tax Exemption on Manufacturing: As of April 2014 Florida manufacturers are exempt from state sales tax on the purchase of new machinery/equipment, electricity used in production, equipment used in research and development, repair and labor charges, and pollution control equipment. Note, this program will be re-assessed in 2016 and could potentially become permanent at that time.

Qualified Target Industry Tax Refund program (QTI): Used to encourage quality job growth in targeted high value-added businesses. This can be used in conjunction with the Local Jobs Grant program (acting as the match) to allow approved businesses refunds on taxes such as corporate income, sales, ad valorem, intangible personal property, insurance premium, communications services, and other taxes.

Quick Response Training (QRT): Provides grant funding for customized training for new full-time permanent employees for targeted companies new to Florida or expanding in Florida.

Incumbent Worker Training Grants (IWT): Provides funding for training to existing businesses. Through this grant, Florida is able to effectively retain businesses and help them stay competitive by supporting skills-upgrade training for existing full-time employees.

Florida Economic Development Transportation Fund: Also known as the Road Fund program, is designed to alleviate transportation problems that adversely impact a specific company's location or expansion decision.

Quick Action Closing Fund (QACF): The state has the ability to provide a discretionary grant to close a competitive gap for specific projects, which create jobs and investment within the state. The Closing Fund award is paid out based on specific project criteria outlined in a performance-based contract between the company and the State of Florida.

High Impact Performance Incentive (HIPI): This incentive is a negotiated performance grant used to attract and grow major, high impact facilities in Florida.

Qualified Defense and Space Contractor Tax Refund (QDSC): This is a tool to preserve and grow Florida's high technology, defense related employment base – giving Florida a competitive edge as defense, homeland security, or space business contractors consolidate defense contracts, acquire new contracts, or convert to commercial production. Provides a tax refund of up to \$3,000 per net new Florida full-time equivalent job created or retained (\$6,000 in an Enterprise Zone or rural county).

There are also several federal programs that Indian River County can utilize such as Economic Development Administration (EDA) tools, Work Opportunity Tax Credit (WOTC), Community Development Block Grants (CDBG), HUB-Zone, and Small Business Association (SBA) loans.



Section 5.3: The Indian River County Competitive Position: Overall

Introduction

Based on the core economic asset maps, competitive positioning was developed for Indian River County as a whole. Competitive positioning statements are “elevator pitches” or what you would tell a site selector if you only had a few minutes to talk to him/her. These are important as they depict the county’s strengths and also act as a guide when marketing the county.

Overall Positioning

Indian River County has access to a labor force of over 470,000, which has been growing at a rate of 17.5 percent over the last ten years. These individuals are well educated, 87.3 percent of them have graduated high school, and have access to some of the best training in the nation including Indian River State College, which was recently named a top ten community college in the nation. That being said, the cost of doing business is low. Florida is rated the 5th best state in terms of state business tax climate and offers some of the best training grants in the nation. In addition, Indian River County has some of the lowest millage rates in the state along with reduced impact fees for specific industries. Access to raw materials and markets is also an advantage within Indian River County as there is ample access to regional markets via I-95 and the Florida Turnpike. Access to international markets is available via the two municipal airports, nearby Orlando International Airport, and several major ports located on the eastern coast. The closest port, Port Canaveral, is designated as a foreign trade zone and can ship products easily to Canada, South America, Europe, Africa, and Asia. All of this before we even mention the superb quality of life experienced within a coastal Florida county.

Talking Points

Low Cost of Doing Business:

- Florida is rated as the 5th best state in terms of state business tax climate
- Indian River County has some of the lowest millage rates within the state
- The cost of living within Indian River County is four percent lower than the national average

Transport:

- There is ample access to regional markets via I-95 and SR 60, which run through the county, and the Florida Turnpike, which can be accessed just west of the county via SR 60 or south of the county via I-95.
- Access to international markets is available through several major ports on the coast. The closest being Port Canaveral, which is about an hour away
- Indian River County also has two airports and is within a 90-minute drive of one of the nation’s largest airports in Orlando.

Labor:

- Labor costs are 5-13 percent lower than the national average across the board.
- Florida has a low unionization rate of 5.4 percent, which is 5.9 percent lower than the national average.

Training:

- Indian River County has access to some of the best training grants and resources in the nation.
- Indian River State College was named one of the best ten community colleges in the country.



Section 6: Target Industry Assessment

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Section 6.1: Target Industry Assessment: Overview

Overview

The following section will address the targeted industries within Indian River County. It is meant to review the current target industries and assess their potential fit for Indian River County based on the research conducted to date; no new research will be provided within this section.

Indian River County completed a 2030 Comprehensive Plan, which was adopted in October of 2010. This plan outlines the specific industries that Indian River County is currently targeting. Ady Advantage based its assessment off of the industries outlined in the comprehensive plan with additional input from other area resources such as target industry studies for nearby local governments, the Indian River County Chamber of Commerce website, and previously conducted research addressed within this report.



Section 6.2: Target Industry Assessment: Review of Current Target Industries

Current Targeted Industries

The industries outlined within the 2030 Comprehensive Plan are as follows:

- Clean Energy
- Life Sciences
- Information Technology
- Aviation/Aerospace
- Financial/Professional Services
- Manufacturing/Warehouse/Distribution
- Emerging Technologies
- Arts, Entertainment, and Recreation
- Post Secondary Public and Private Educational Institutions
- Other Clean Light Industries

This list, according to the 2030 Comprehensive Plan, is an adoption of the state of Florida’s targeted industries within Indian River County with the addition of “Post Secondary Public and Private Educational Institutions” and “Other Clean Light Industries”.

Assessment

The list of industries above is not very targeted. In site selection there is a saying, “If you specialize in everything you are specialized in nothing”. This means that having a laundry list of industries that you believe Indian River County should target shows to site selectors and businesses that you don’t truly understand your value proposition or your key differentiating factors that make Indian River County unique.

Targeted industries should also be more focused for the same reason. Manufacturing/Warehouse/Distribution is very broad and is probably a targeted industry by almost every economic development organization in some way, shape, or form. But, for example, Wood Products Manufacturing is much more specific and just reading the title depicts to site selectors and businesses that the region knows it has a unique advantage within that industry.

The comprehensive plan also stated that, “the County’s list of target industries should match the State’s Target Industry List.” We disagree with this statement for a couple of reasons but the main reason is as follows. The state covers a much broader geographic scope. Within the state are very different communities with diverse economies. One could even argue that the State of Florida has one of, if not the most, diverse economy in the nation. For example Jacksonville is very different than Miami. Both have advantages and can be attractive to businesses and both are in Florida. You would not expect to see them targeting identical industries. Nor should they as each region has their own unique strengths. However, the state of Florida needs to communicate and describe the types of businesses for the entire state as a whole and does so with a broad, sweeping brush.

Indian River County has the opportunity to hone in on its key advantages and unique fits when it comes to target industries so it may truly differentiate itself and stand out from other counties and regions within the state and within the nation. In this case depth is better than breadth.



Section 6.3: Target Industry Assessment: Target Industry Recommendations

Target Industry Recommendations

A full analysis is recommended for identifying target industries and industry clusters which are uniquely qualified to benefit from the business positive attributes of Indian River County. However, based on the research performed to date, which includes several interviews and multiple input sessions conducted in this study, Ady Advantage feels confident confirming the targeting of the following industries:

- Manufacturing:
 - Aviation / Aerospace
- Life Sciences / Research
- Regional Warehousing / Distribution

These industries have been identified and are selected based on industry knowledge, current clusters, and/or strong assets within the county. Ady Advantage would encourage the county to conduct further research to identify other specific industries to target as well as develop key positioning statements for each industry. This method of communicating unique regional attributes and strengths provides a solid foundation for both business recruitment and expansion.

There has been some concern that pairing down the target industry list itself may limit the ability of the county to provide local incentives and limit the ability of the county to support state incentives, particularly the Local Jobs Grant program and the State Qualified Target Industry (QTI) Tax Refund Program. As it stands now, the Local Jobs Grant program is a financial incentive available only to industries on the county's target industry list.

There are two potential solutions:

1. Officially keep the list of target industries broad (in other words, keep the current list of industries) but actively recruit only those industries that best fit the county's assets. This would allow the county to still financially incentivize the broad range of industries while focusing specifically on recruiting a subset of those industries.
2. Change the eligibility criteria for the Local Jobs Grant. It could be changed to: "A firm included on Indian River County's targeted industry list or the State of Florida's target industry list creating 5 or more full-time jobs OR a firm creating 5 or more full-time jobs that pay at least 75% of Indian River County's current average annual wage". A caveat could be added, similar to the caveat used by Enterprise Florida: "companies that collect and remit Florida sales tax, or that are licensed by the Florida Department of Business Regulations are not eligible".

Overall, the ability for the county to provide negotiated financial incentives is a positive to prospective businesses but to make it successful for all of those involved Ady Advantage recommends discussing and agreeing upon specific parameters. This will help ensure that county efforts are coordinated and consistent while ensuring adequate financial resources for incentives offered to future prospective businesses.



Section 6.3: Target Industry Assessment: Target Industry Recommendations

Target Industry Recommendations (Cont.)

Without conducting a full-blown target industry analysis, which would include additional research into each of the specific industries, it is very difficult to recommend specific industries at the depth needed to satisfy site selectors and businesses (see the previous page for a select few industries that Ady Advantage confirms to be fits for Indian River County). To that note using the list outlined on the previous page and the research conducted to date Ady Advantage has a few recommendations to better hone in on the industries that would best fit Indian River County.

- Separate manufacturing from warehouse/distribution. This will allow you to specify unique advantages within each industry. For example, the message for warehouse/distribution could be that Indian River County not only has ample access to regional, national, and international markets via Interstate 95, turnpike, coastal ports, and nearby airports but also has low crime compared to the state.
- Look at specifying which manufacturing sectors Indian River County has a unique advantage. Again, depth vs. breadth. Manufacturing encompasses a lot of industries including automotive, aviation, food processing, plastics, wood, etc. What is it that Indian River County excels at within manufacturing or could have a unique advantage over other areas in when looking to the future? Some thoughts could be high-value manufacturing, such as aviation, or manufacturing that serves the local or regional markets such as food processing.
- Eliminate industries such as “Arts, Entertainment, Recreation” and “Financial/Professional Services” from the target industry list. Not that these industries wouldn’t be welcomed in Indian River County but these industries are usually secondary industries that follow other industries’ growth and decline. This is usually true unless there is a strong unique advantage or cluster within the region.
- Emerging Technologies is an interesting industry that could fall into a few of the other industries that are already listed. However, if Indian River County is going to continue to go after Emerging Technologies the county needs to have a very unique message. Marine Science, listed under Emerging Technologies, is one of those industries that Indian River County would have a unique message for. There is access to nearby unique research facilities (Florida Atlantic University – Harbor Branch) and a few businesses who are pushing the envelope within this industry, which would make a very compelling story to other marine sciences businesses.

Overall, when deciding which industries to target take a real close look at what the positioning or story might be to each of them. If there is not a compelling story, from a businesses perspective, then it should not be a target industry for the county. A target industry should not simply be a wish list of industries that a county would like to attract but a list of industries that the county either currently excels at or would excel at given the opportunity. What the county excels at should be specific and quantifiable through statistics, local and regional assets, and testimonials.



Section 7: Action Plan

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Section 7.1: Action Plan: Scope of Ady Advantage Recommendations

Scope of Ady Advantage Recommendations

The diagrams below can be used to provide an overview of the economic development building blocks. It is also useful in highlighting the Ady Advantage team’s scope of work for this project.

TIER ONE: ORGANIZATIONAL STRATEGY

The Economic Development Element of the Indian River County Comprehensive Plan and the Economic Development Marketing Plan together provide a measured and integrated organizational strategy for economic development within Indian River County.

TIER TWO: ECONOMIC ASSETS

Discovering and organizing Indian River County’s economic assets has been a major thrust of the Ady Advantage scope of work. Findings are detailed in Sections 3-5.

TIER THREE: POSITIONING

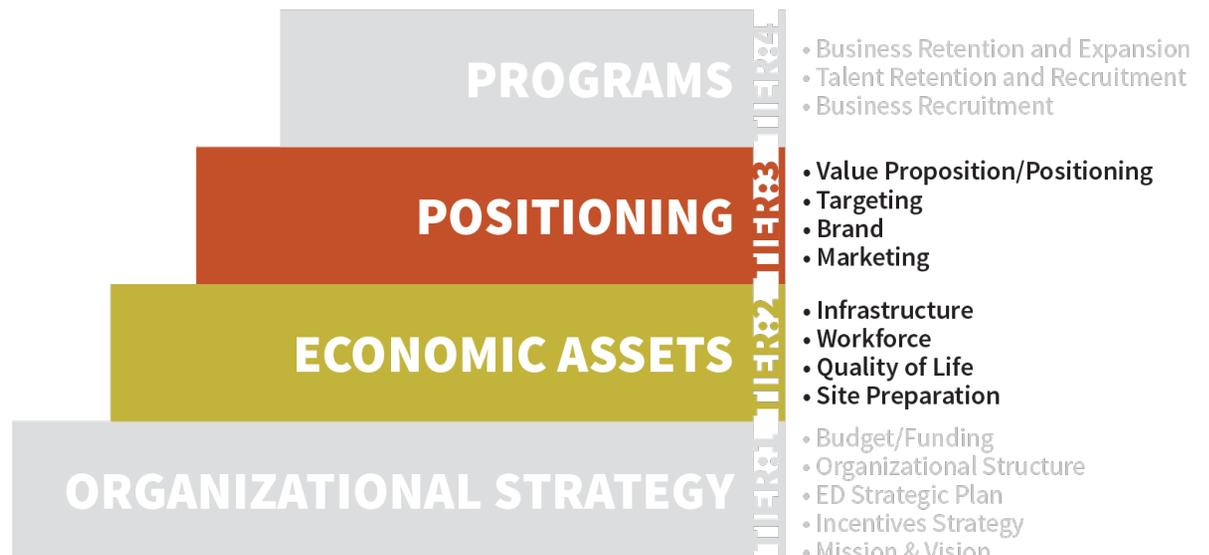
Likewise, determining the best overall positioning for Indian River County to use for economic development purposes was a major thrust of the Ady Advantage scope of work. The recommended positioning is found in Section 8.4.

TIER FOUR: PROGRAMS

Ady Advantage did not specifically evaluate Indian River County’s existing economic development programs, although we do share some observations of elements the County should consider in order to meet its overall goals.

ADY ADVANTAGE SCOPE OF WORK

Economic Development Building Blocks



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Section 7.2: Action Plan: Current Economic Development Goal and Objectives Summary

Overview

Chapter 5 of the 2030 Indian River County Comprehensive Plan, adopted on October 12, 2010, focuses on the economic development goals, strategies, and actions of the county. The Comprehensive Plan includes an inventory of current conditions and identifies the County's constraints and potentials, as well as specifies the County's economic development goals, objectives, policies and methods for implementing, evaluating and monitoring the plan.

The goals and objectives are summarized below for continuity between the long-range Comprehensive Plan and this initiative. Refer to the Comprehensive Plan for more detail, which can be found here: http://www.irccdd.com/Planning_Division/CP/2030/Ch05-Economic-Development.pdf

CURRENT ECONOMIC DEVELOPMENT GOAL AND OBJECTIVES

Goal: It is the goal of Indian River County to have balanced and orderly economic growth.

- Objective 1: Low Unemployment Rate. Target rate is no more than one percentage point higher than the State of Florida's average annual unemployment rate.
- Objective 2: Diversified Economic Growth. Target is to increase the number of jobs in the county's new high wage target industries by 1,000 between 2010 and 2015.
- Objective 3: Maintain Trained Labor Force. Target is to have sufficient post secondary training programs that meet the needs of the country's target industries.
- Objective 4: Facilitate Economic Development. Target is for the county and municipalities within the County to have at least two additional established industrial/business/technology/research parks (for a total of 4 parks) with sufficient land and adequate infrastructure to accommodate new or expanding businesses. At least one of these parks should be developed for Biotech/research/technology industries.
- Objective 5: Intergovernmental Cooperation. Target: By 2011, there will be an adopted Interlocal agreement between the County and the municipalities that provides for coordinated economic development funding and economic development activities.
- Objective 6: Tourism Development. Target is to increase tourism within the County to that point that by FY 2014/2015, the County's annual local option tourist tax revenue will be at least \$1,600,000.
- Objective 7: Economic Development Community Acceptance. Target is that a majority of the County's population will recognize the importance of and support County economic development activities by supporting the County's economic development initiatives, such as tax abatement program referendums, needing voter approval.



Section 7.3: Action Plan: Current 2014-15 Economic Development Marketing Plan Summary

Current Economic Development Marketing Plan

The Indian River County Chamber of Commerce is the designated county-wide economic development organization as specified in the Economic Development Element of the County's Comprehensive Plan. Each year, it submits its proposed Marketing Plan to the Economic Development Council for approval, as outlined in the Comprehensive Plan. This plan is briefly summarized below; more details can be found in the plan itself, which can be found here: <http://www.indianriverchamber.com/userfiles/file/Economic%20Development/ED%20Marketing%20Plan%202014-2015.pdf>

KEY ELEMENTS OF THE CURRENT 2014-2015 ECONOMIC DEVELOPMENT MARKETING PLAN

Business Retention and Expansion

- Enterprise Zone
 - Support awareness of EZ, conduct workshops, provide technical assistance, monitor legislation
 - Seek to extend the program's expiration date
 - Seek to include Fellsmere as part of the EZ
- Business Visitation
 - Coordinate manufacturers' tours, public tours
 - Conduct regular site visits to targeted industries
- Local Business Promotion
 - Coordinate Employer Roundtable events
 - Promote and encourage participation in Florida Virtual Entrepreneur Network website
 - Conduct site visits to local headquarters of local manufacturers
 - Coordinate annual industry Appreciation Awards luncheon
- Business Expansion
 - In cooperation with other agencies, coordinate workshops for local/regional businesses with a focus on encouraging business expansion
- Primary Information Source for Area Businesses
 - Serve as a clearing house for information on resources available to businesses
- Intergovernmental Coordination
 - Work closely with city and county planning departments and others to address concerns of business owners and propose solutions
- Foreign Trade
 - Utilize Enterprise Florida, Inc. (EFI) and the US Department of Commerce to provide assistance to companies that wish to export
- Staffing /Funding
 - Utilize Chamber volunteers to assist in carrying out marketing and business retention policies.



Section 7.3: Action Plan: Current 2014-15 Economic Development Marketing Plan Summary (continued)

Attract New Industries

- Marketing and Advertising
 - Conduct direct marketing campaign
 - Market industrial areas in the County to alternative energy firms, along with appropriate commercial locations to technology firms, via direct marketing, trade show representation, and partnerships with existing firms
 - Encourage local employers to assist in the attraction of new companies
 - Participate in Florida's Research Coast Economic Development Coalition
 - Update advertising and collateral material
- Working with Other Agencies
 - Market Indian River County for reverse investment by international firms in targeted industries
 - Increase relationships with local key referral sources
 - Strengthen relationships with alternative financing sources
 - Strengthen relationships with local and state elected officials to garner support for targeted industry recruitment efforts
- Web-Based Information
 - Maintain and update the economic development website and promote the Zoom Prospector property search website
 - Conduct ACCRA Cost-of-Living survey and maintain the ACCRA Cost-of-Living calculator on the economic development website
 - Coordinate annual industry Appreciation Awards luncheon



Section 7.4: Action Plan: Economic Development Positioning of Indian River County

Overview

A key deliverable of this initiative is to develop a compelling and differentiating positioning of Indian River County that can be used to unify and clarify communications about the County from an economic development perspective.

PROPOSED INDIAN RIVER COUNTY POSITIONING STATEMENT

Indian River County, located on the east central coast of Florida, has access to a labor force of over 470,000, which has been growing almost twice as fast as the U.S. average; 17.5 percent over the last ten years. These individuals are well educated, 87.3 percent of them have graduated high school, and have access to some of the best training in the nation including Indian River State College, which was recently named a top ten community college in the nation. That being said, the cost of doing business is low. Florida is rated the 5th best state in terms of state business tax climate and offers some of the best training grants in the nation. In addition, Indian River County has some of the lowest millage rates in the state along with reduced impact fees for specific industries. Access to raw materials and markets is also an advantage within Indian River County as there is ample access to regional markets via I-95 and the Florida Turnpike. Access to international markets is available via the two municipal airports, nearby Orlando International Airport, and several major ports located on the eastern coast. The closest port, Port Canaveral, is designated as a foreign trade zone and can ship products easily to Canada, South America, Europe, Africa, and Asia. All of this before we even mention the superb quality of life experienced within a coastal Florida county.

PROPOSED INDIAN RIVER COUNTY ELEVATOR PITCH

Indian River County is an idyllic location known for its way of life. Those who visit, live, or work here find communities are safe, modern and loaded with ecological, cultural, educational and technological amenities. It's also a cost-competitive place to grow or expand businesses. In addition the county offers:

- access to Florida and international markets via interstate highways and multimodal transportation,
- advanced industries from aviation/aerospace to aquaculture,
- world-renowned agricultural products and recreation opportunities,
- research industries, emerging tech, life sciences and healthcare,

in one of the most desirable climates in the country, for recreation and for business.

INDIAN RIVER COUNTY KEY POSITIONING ELEMENTS

Audience: For those who enjoy this idyllic location year round,

Reference: Indian River County, Florida offers the best of both worlds,

What's Unique: a desirable location for business and pleasure,

Benefit: a balance that helps build your business in the sun.



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline

Proposed Economic Development Action Plan for Indian River County

A key deliverable of this initiative is to develop a compelling and differentiating positioning of Indian River County that can be used to unify and clarify communications about the County from an economic development perspective. Over the next few pages are the strategies to do so along with the rationale, specific tactics, and timeline.

Indian River Action Plan

Strategy #1: Focus on business retention and expansion (BRE) first.

RATIONALE: It has been shown that most jobs and capital investment result from business retention and expansion efforts. A strong BRE program is also a region’s best defense against any competing region’s business recruitment efforts. A strong BRE program also serves the dual purpose of educating existing businesses about the County’s economic development goals and strategies. Lastly, a strong BRE program can provide leading insights into emerging issues for existing businesses, which can result in new initiatives to address them preemptively.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Create a BRE plan including specific goals and objectives	Determine the key organizations	Chamber	Medium	Low	Low	April 2015
	Determine goals and objectives	Chamber	High	Medium	Low	June 2015
	Develop a specific and actionable plan, present to EDC & BCC	Chamber	High	Medium	Low	October 2015
Select BRE tracking and reporting software	Review and assess the current offerings	Chamber	Medium	Medium	Low	July 2015
	Agree upon the best solution	Chamber	High	Medium	Medium	October 2015
Conduct BRE interviews		Chamber	High	Medium	Low	Ongoing
Maintain and enhance relationships with specific regional organizations	Identify key organizations	Chamber	Low	Low	Low	Ongoing
	Reach out to communicate about key issues	Chamber	Medium	Medium	Low	Ongoing
	Schedule meetings to review important issues	Chamber	Medium	Medium	Low	Quarterly
Implement programs and action steps based on BRE interviews	Analyze BRE findings to identify opportunities	Chamber	Medium	Medium	Low	Quarterly
	Communicate opportunities to appropriate organizations	Chamber	Medium	Medium	Low	Quarterly
	Create programs and actions, provide updates to EDC & BCC	TBD	TBD	TBD	TBD	Ongoing



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

Indian River Action Plan

Strategy #2: Expand the Target Industry Assessment (Section 6) with a more thorough Target Industry Analysis to focus recruitment efforts.

RATIONALE: The County has not had a formal target industry study conducted for it in at least 20 years. The regions that are most successful in business recruitment are laser focused on recruiting businesses within specific areas where they have the strongest value proposition. While Ady Advantage provided suggestions for refining and curating the previous list, which was lengthy, the County would benefit from a more robust, quantitative backdrop from which to focus priorities. This would also better address questions from stakeholders related to specific targets and help prevent the gradual accretion of new target industries over time without studied evaluation and qualification. Note that although this strategy focuses on “target industries,” it is expected that the target industries will build off of existing industries and therefore also have components of BRE as well as business recruitment.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Conduct a target industry analysis at the county level	Determine scope	Chamber & County	Low	Low	Low	May 2015
	Conduct target industry analysis at County level (either with internal expertise or through a consulting firm)	Chamber & County	High	Medium	Medium / High	July 2015
Create a list of specific target industries along with positioning statements for each	Identify specific target industries for recruitment purposes to include the findings from the Positioning Analysis	Chamber & County	High	Low	Low	September 2015
	Identify key valued assets for each of the industries, which may include regional assets	Chamber & County	Medium	Medium	Low	October 2015
	Develop positioning statements for each industry	Chamber & County	High	Medium	Medium	October 2015
Agree upon industry priorities by industry sector, company size, and company growth		Chamber & County	Medium	Medium	Low	October 2015
Create industry sell sheets* for the selected target industries		Chamber	High	Medium	Medium	December 2015
Develop a marketing plan around each of the specific target industries and priorities, present to the EDC & BCC		Chamber	High	Medium / High	Medium / High	December 2015

* An industry sell sheet is a 2-4 page graphically designed marketing piece that highlights key assets and advantages of a location. The key assets and advantages are chosen based on their importance to the specific target industry. For detailed examples, please see the appendix.



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

Indian River Action Plan

Strategy #3: Refresh the Indian River County brand for economic development purposes.

RATIONALE: A lot of effort has been put into developing a strong positioning for Indian River County through this project. With that in hand, the key is to communicate this positioning consistently over time to multiple audiences. This includes not only words (the academic language of the positioning statement translated into campaign language and themes), but also a visual identify that reinforces the positioning. This visual identify includes perhaps a new logo, but no less importantly consistent use of colors, imagery, graphics, fonts, etc., to create a brand identity for the region. Another reason for conducting a brand audit is that the outbound messages are somewhat discordant, with use of the County logo, Chamber logo, and Chamber Economic Development logo. The timing is that this should be in place prior to the development of outbound marketing materials, such as the website and collateral. Lastly, the audience for the Indian River County economic development brand is as much local stakeholders, business owners, and citizens as “outsiders”, and a rebrand can be the catalyzing event that engages these local audiences in the mission of the County’s economic development efforts.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Conduct a brand audit		Chamber	High	Medium	Medium	May 2015
Develop a distinct brand for economic development purposes (items may include logo, tagline, brand narrative, etc.), present to the EDC & BCC.		Chamber	High	Medium	Medium / High	June 2015
Implement communication of the brand	Identify marketing channels	Chamber	Medium	Medium	Low	May 2015
	Develop marketing materials	Chamber	Medium	Medium / High	Medium / High	June 2015
	Implement and distribute materials	Chamber	High	Medium / High	Medium	Ongoing



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

Indian River Action Plan

Strategy #4: Develop a stand-alone economic development website and related collateral materials.

RATIONALE: Websites are the #1 way that prospective companies and site selectors from outside the region learn about an area. This positioning study and the related educational content provided to the community reinforce that Indian River County would also benefit from representing some data at the super-regional level (e.g., Indian River County plus adjoining counties), and should also be equipped to provide information about the business climate in the State of Florida. The current chamber website is outdated and lacks key information and maps that are expected in ED websites.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Develop related collateral materials	Identify essential collateral materials (e.g., regional profile, direct mail pieces, email templates, etc.)	Chamber	High	Medium	Low	June 2015
	Development of materials, present to EDC & BCC	Chamber	High	Medium / High	Medium / High	October 2015
Develop a stand-alone economic development website	Determine organizational responsibilities	Chamber	Low	Low	Low	June 2015
	Develop website, present to EDC & BCC	Chamber	High	Medium / High	High	June - December 2015
Review and evaluate effectiveness of website and related collateral materials and adjust as necessary		Chamber	Medium	Medium	TBD	Ongoing



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

Indian River Action Plan

Strategy #5: Provide leadership in the presentation of sites and buildings.

RATIONALE: Virtually every notable expansion or relocation project begins with a search for an available site or building. However, the County and its City partners control only a portion of available industrial real estate. At the same time, property owner participation in available property listing databases is inconsistent and listings are often incomplete, which puts the county at a competitive disadvantage. It is recommended that the Chamber create minimum property listing information thresholds that must be met prior to the economic development entity promoting these properties. Although there may be growing pains at first, in the long run this will be best for property owners, the county and the cities. Another strategy the County and Cities should pursue is competing on the basis of “readiness” – so exploring tactics such as having property owners or developers create “virtual” buildings on sites, perhaps with City/County involvement of pre-zoning, pre-permitting, and laying out specific utility characteristics, costs, and construction timelines.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Continue to build relationships with developers and land/building owners	Identify all current developers, land, and building owners	Chamber	Medium	Low	Low	Ongoing
	Effectively educate and inform via newsletters/emails	Chamber	Medium	Medium	Low	Ongoing
	Organize roundtable meetings	Chamber	Medium	Medium / High	Low	Quarterly
Create minimum property listing information thresholds	Identify minimum property listing criteria	Chamber	Low	Low	Low	May 2015
	Communicate those to developers and property owners	Chamber	Medium	Medium	Low	July 2015
	Enforce minimum property listing criteria	Chamber	High	Medium	Low	October 2015
Explore potential property ownership opportunities	Plan appropriately for future opportunities	County & Cities	Medium	Medium	Low	Ongoing
	Discuss potential ownership and public/private partnership opportunities with the appropriate organizations	Chamber, County, & Cities	Medium	Low	Low	Ongoing
	Determine the best course of action on an as needed basis	Chamber, County, & Cities	Medium	Low	Low	Ongoing
Explore shovel ready and virtual building programs or assistance.		Chamber, County, & Cities	High	Medium	TBD	Ongoing



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

Indian River Action Plan

Strategy #6: Continue to support regional economic development efforts.

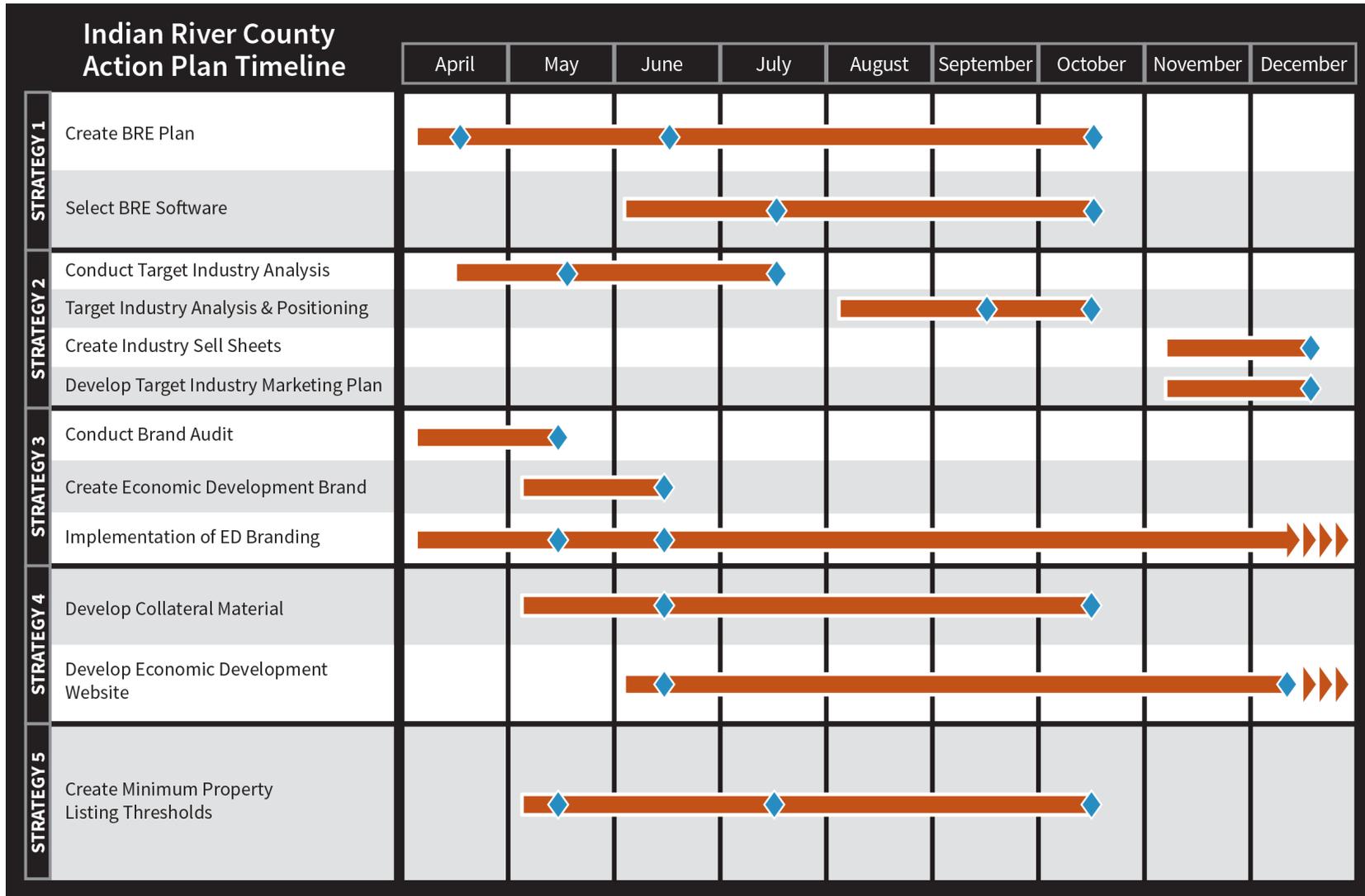
RATIONALE: One of the big megatrends in economic development is increased regionalism. This trend is being driven by a number of factors, including the fact that regions tend to represent labor pools better than either single jurisdictions or states. Ideally, regions also provide a convenient single point of contact for site selectors and others from outside the region who want to deal primarily with one person; a regional representative knows the local partners and provide site selectors with the information they seek during the site selection process. It should be noted that regionalism is not about trying to make all the communities within a region homogenous; in fact, the opposite is true: economic regionalism involves talking about the region from a labor market perspective and then promoting the diversity of the different communities within the region. Thinking regionally also provides communities and counties with the opportunity to aggregate assets that may fall outside their strict jurisdictional boundaries, to the benefit of their communities and counties. An example may be an international airport, shopping area, recreational area, major manufacturer or business, etc., located just outside one's jurisdictional boundaries, but having a positive impact on the neighboring area. Indian River County has long established relationships with neighboring county economic development organizations, which is a competitive advantage, and these relationships should be continued. Joint projects, when possible, are an aspirational goal.

Tactics	Steps	Responsibility	Impact	Difficulty	Cost	Timeline
Continue to support regional economic development efforts	Identify regional and state economic development and supporting organizations	Chamber	Low	Low	Low	Ongoing
	Build relationships with individuals from the regional and state economic development organizations.	Chamber, County, & Cities	Medium / High	Medium	Low	Ongoing
	Continually communicate important happenings and information to these organizations via newsletters/emails	Chamber	Medium / High	Medium	Medium	Ongoing
	Attend/organize meetings with various regional and state organizations	Chamber, County, & Cities	Medium	Medium	Low	Ongoing
	Suggest regional efforts when appropriate or opportunistic	Chamber, County, & Cities	TBD	TBD	TBD	Ongoing



Section 7.5: Action Plan: Marketing Strategies, Tactics, and Timeline (continued)

The timeline below highlights the major tasks listed in the action plan on the previous pages. The flow chart style helps identify when certain tasks take place across the six different strategies. Ongoing and quarterly tasks are not listed on the timeline below; however, these tasks should continue to happen throughout the timeline.



▶▶▶ Ongoing Activity ◆ Project Milestone



Appendix – Online Property Listings

Number ¹	Property Name	Listed on Florida State website www.enterpriseflorida.com/find-properties	Listed on Indian River County website www.indianriversites.com/
1 (B)	Kennedy Property, Vero Beach		
2 (S)	Indian River Park of Commerce (I-95 and SR60), Vero Beach		
3 (B)	5235 45 th Street, EZone Industries, Vero Beach		
4 (B)	2300 3 rd Court, Vero Beach		
5 (B)	1660 Old Dixie, Vero Beach		
6 (S)	6255 U.S. Hwy. 1, Vero Beach		
7 (B)	4401 77 th Street, Vero Beach		
8 (B)	Six Industrial Buildings on CR512, Sebastian		
9 (B)	10055 102 nd Terrace (Macho Building), Sebastian		
10 (S)	Fellsmere Joint Venture, Fellsmere		
11 (B)	4900 42 nd Place, Vero Beach		
12 (B)	Gateway Business Center, near 42st Street and 43 rd Avenue		

¹In order viewed. (B) = Building. (S) = Site.



Appendix – Online Property Listings: EnterpriseFlorida.com

Site 2 (S) Indian River Park of Commerce (I-95 and SR60), Vero Beach



INDIAN RIVER INDUSTRIAL PARK - FOR LEASE
 20th Street
 Vero Beach, FL 32966



OWNERS WILL BUILD TO SUIT FOR LONG TERM QUALIFIED TENANTS!

CONSTRUCTION TIME: Typical construction periods range from 12 to 15 months.

LOT SIZES: Flexible property sizes designed to accommodate buildings from 50,000 to 1,000,000 square feet.

TOTAL PARK SIZE: 145 ACRES (approximately, including roadways and drainage) with approximately 95 acres developable. Retention Areas are located off site.

PROPERTY HIGHLIGHTS:

- Prime I-95 Interchange Location
- Custom designed building - Sites Ready to build!
- Flexible building sizes!
- Off Site Retention Areas!
- S.R. 60 / I-95 INTERCHANGE!
- Traffic Signaled Access!
- Reasonable Rates!

ED Contact
 Helene Caseltine
 Indian River County Chamber of
 Commerce
 1216 21st Street Vero Beach 32961
 Phone: (772) 567-3491
 Email:
director@indianriverchamber.com
 Website: indianriverchamber.com

Land Information			
Property ID:	9448	Zoning:	IL (Industrial Light)
County:	Indian River	Updated:	9/10/2014
Total Available (acres):	3,920,400		
Pricing Terms			
For Sale:	No	Lease Cost:	\$4.5
For Lease:	Yes		
Geographic/Transportation Information			
Rail Access:	No		
Utility Information			
Electric Provider:	FPL	Sewer Provider:	County



Appendix – Online Property Listings: EnterpriseFlorida.com

Site 3 (B) 5235 45th Street, EZone Industries, Vero Beach



Industrial Property Complex
5235 45th Street
Vero Beach, FL 32967



THE RIGHT INDUSTRIAL PROPERTY AT THE RIGHT LOCATION. 5 acres of this 9.89 acre site in the Enterprise Zone was the former site of a first class truss manufacturing facility. The office, storage and open fabrication buildings are built to last. 4.89 acre parcel is ready for expansion when your business outgrows the current facility. The site has good access to SR 60, US Highway 1 and I-95. This is a great site for the relocation of your manufacturing business to Indian River County.

ED Contact
Helene Caseltine
Indian River County Chamber of Commerce
1216 21st Street Vero Beach 32961
Phone: (772) 567-3491
Email: director@indianriverchamber.com
Website: indianriverchamber.com

Building Information			
Property ID:	7108	Zoning:	General Industrial
Total Available (sq ft):	52,709	Updated:	6/9/2014
Pricing Terms			
For Sale:	Yes	For Lease:	No
Sale Price:	\$690,000.00		
Geographic/Transportation Information			
County:	Indian River	Rail Access:	No
Utility Information			
Electric Provider:	Florida Power and Light, Indian River County		

Enterprise Florida
500 N. Main Street, Suite 1100
Orlando, FL 32803

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Appendix – Online Property Listings: EnterpriseFlorida.com

Site 5 (B) 1660 Old Dixie, Vero Beach



INDUSTRIAL WAREHOUSE FOR RENT
4415 77th Street
Vero Beach, FL 32967



FEATURES:

- IDEALLY LOCATED IN THE CENTER OF INDIAN RIVER COUNTY'S GROWTH
- REAR PAVED YARD AREAS
- HIGH CEILINGS IN CENTER
- SEVERAL LOADING DOCK SPACES - LARGE OVER-HEAD DOORS
- LARGE OFFICE / SHOWROOM AREA
- EXCELLENT ACCESS TO MAJOR ROADS
- SHARED DRAINAGE & PARKING

BUILDING SIZE: 3,760 SF in Office 22,914 SF in Warehouse 26,680 SF Total

YEAR BUILT: Renovated in 2004

LAND SIZE: Approximately 2 Acres

ZONING: Industrial General (IG)

RE TAXES: Approximately \$12,908

UTILITIES: County Water & Sewer

CONSTRUCTION: Steel & Concrete Structure with solid concrete walls.

ED Contact
Helene Caseltine
Indian River County Chamber of
Commerce
1216 21st Street Vero Beach 32961
Phone: (772) 567-3491
Email:
directored@indianriverchamber.com
Website: indianriverchamber.com

Building Information			
Property ID:	9359	Updated:	8/26/2014
Total Available (sq ft):	26,680		
Pricing Terms			
For Sale:	No	Lease Cost:	\$6.00
For Lease:	Yes		
Geographic/Transportation Information			



Appendix I – Online Property Listings: EnterpriseFlorida.com

Site 9 (B) 10055 102nd Terrace (Macho Building), Sebastian



10055 102nd Terrace
10055 102nd Terrace
Sebastian, FL 32958



30,000 SF lease in effect with 4 years remaining on 5 year lease for \$144,000/year plus CAM fees. 3 phase power, Concrete Block & Steel construction. Approx. 30' ceilings, 10 x 14 and 10 x 10 Bay Doors. 2 interior mezzanines. Fully air conditioned. Remaining 20,000 SF complete with separate

utilities. Close to I-95, located on 4.8 acres.

ED Contact
Helene Caseltine
Indian River County Chamber of
Commerce
1216 21st Street Vero Beach 32961
Phone: (772) 567-3491
Email:
directored@indianriverchamber.com
Website: indianriverchamber.com

Building Information			
Property ID:	5666	Primary Construction Material:	STER/CNALM
Total Available (sq ft):	30,000	Updated:	8/20/2014
Year Built:	1999	Number of Stories:	1
Ceiling Height:	30		

Pricing Terms			
For Sale:	Yes	For Lease:	No
Sale Price:	\$3,000,000.00		

Geographic/Transportation Information			
County:	Indian River	Rail Access:	No

Enterprise Florida
200 N. Magnolia Ave. Suite 1100
Orlando, FL 32803

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Appendix – Online Property Listings: EnterpriseFlorida.com

Site 10 (S) Fellsmere Joint Venture, Fellsmere



Fellsmere Industrial Property
21 N. Myrtle St.
Fellsmere, FL 32948



Rare flex space industrial warehouse in Fellsmere. Liberal zoning accommodates multiple uses. Ease of access directly on CR-512.

(22) individual flex space bays, each with overhead & pedestrian door plus (1) large end cap office.

ED Contact
Helene Caseltine
Indian River County Chamber of Commerce
1216 21st Street Vero Beach 32961
Phone: (772) 567-3491
Email: directored@indianriverchamber.com
Website: indianriverchamber.com

Building Information			
Property ID:	6889	Primary Construction Material:	Metal
Total Available (sq ft):	19,520	Updated:	8/12/2014
Year Built:	1974	Number of Stories:	1
Ceiling Height:	15.5-19	Number of Truck Docks:	22
Pricing Terms			
For Sale:	Yes	For Lease:	No
Sale Price:	\$450,000.00		
Geographic/Transportation Information			
County:	Indian River	Rail Access:	No

Enterprise Florida
350 N. Magnolia Ave. Suite 1100
Orlando, FL 32803

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Appendix – Online Property Listings: EnterpriseFlorida.com

Site 11 (B) 4900 42nd Place, Vero Beach



12,000 to 30,800 SF INDUSTRIAL WAREHOUSE
 4900 42nd Place
 Vero Beach, FL 32967



30,800+ SF Concrete Warehouses (Lot 5) For Sale and can be quickly activated! Industrial area with easy access to major traffic areas. Additional lots adjacent to property available for sale.

FEATURES:

- Located in IRC Enterprise Zone and HUB Zone
- Developing Industrial Area
- 27,500 SF in Warehouse, 3,280 in Off.
- Loading Dock Bay door
- 18 ft wide bay door X 16 ft. high!
- 1.56 Acre/3 phase power
- 20 ft. Ceilings / IG Zone
- Concrete Const., Fire Sprinklers

PRICES:

- Lot 1 = 1.07 Acres \$5.00 PSF
- Lot 2 = 1.07 Acres \$4.50 PSF
- Lot 3 = 1.07 Acres \$4.25 PSF
- Lot 4 = .96 Acres \$3.80 PSF
- Lot 5 with 30k Building \$2,194,500

ED Contact

Helene Caseltine
 Indian River County Chamber of
 Commerce
 1216 21st Street Vero Beach 32961
 Phone: (772) 567-3491
 Email: director@indianriverchamber.com
 Website: indianriverchamber.com

Building Information			
Property ID:	6159	Updated:	7/2/2014
Total Available (sq ft):	30,800		
Pricing Terms			
For Sale:	Yes	For Lease:	No
Sale Price:	\$2,194,500.00		
Geographic/Transportation Information			
County:	Indian River	Rail Access:	No



Appendix – Online Property Listings: IndianRiverSites.com

Site 3 (B) 5235 45th Street, EZone Industries, Vero Beach



IndianRiverSites_Site3

Property Report (5235 45th Street)



Property Details	
Site/Building Name	Industrial Property Complex
Street Address	5235 45th Street
City	Vero Beach
County	Indian River County
Zip Code	32967
Type of space	Industrial
Min Size	52,709 sf
Max Size	52,709 sf
Last Updated	6/9/2014

Contact Information	
Contact Name	Dorothy Hudson
Email	DhudsonFL@gmail.com

Availability	
For Sale	Yes
Sale Price	\$690,000.00
Sale Terms	Taxes: \$14,328

Building Details	
Total Building sf	52,709 sf

Site Details	
Lot Size	9.89 acres sf
Total Acres	9.89 acres

Incentives	
Enterprise Zone	Yes

Utilities	
Electric Service	Yes
Electric Service Provider	Florida Power and Light, Indian River County

Other	
Zoning	General Industrial

Contacts	
Company	Alex MacWilliam, Inc Real Estate
Name	Dorothy Hudson
Phone	(772) 231-6509
Mobile Phone	(772) 713-4748
Fax	(772) 234-8126
Email	DhudsonFL@gmail.com
Website	www.AlexMacWilliam.com
Address	2901 Ocean Drive, Vero Beach Florida 32963

Description
THE RIGHT INDUSTRIAL PROPERTY AT THE RIGHT LOCATION. 5 acres of this 9.89 acre site in the Enterprise Zone was the former site of a first class truss manufacturing facility. The office, storage and open fabrication buildings are built to last. 4.89 acre parcel is ready for expansion when your business outgrows the current facility. The site has good access to SR 60, US Highway 1 and I-95. This is a great site for the relocation of your manufacturing business to Indian River County.



5235 45th Street





Appendix – Online Property Listings: IndianRiverSites.com

Site 4 (B) 2300 3rd Court, Vero Beach



IndianRiverSites_Site4A

Property Report (2300 3rd Court)



Availability	
For Sale	Yes
Sale Price	\$1,900,000.00
For Lease	Yes
Lease Rate	\$20.00/sf

Building Details	
Total Building sf	23,000 sf
Number of Floors	2
Year Built	1974

Property Details	
Site/Building Name	5,000 - 23,000 SF MEDICAL/OFFICE
Street Address	2300 3rd Court
City	Vero Beach
County	Indian River County
Zip Code	32960
Type of space	Office
Min Size	8,000 sf
Max Size	23,000 sf
Last Updated	9/3/2014

Contact Information	
Company	Lambert Commercial Real Estate, Inc
Contact Name	Ron Lambert
Address	2945 20th Street
City	Vero Beach
State	Florida
Phone	(772) 778-2334
Fax	(772) 569-9155
Email	Ron@lambertcommercial.com
Website	www.Lambertcommercial.com



Site Details	
Total Acres	1.52 acres

Utilities	
Electric Service	Yes
Electric Service Provider	City
Sewer Service	Yes
Sewer Provider	City
Water Service	Yes
Water Service Provider	City

Contacts	
Company	Lambert Commercial Real Estate Inc.
Name	Billy Moss
Phone	772-778-2334
Mobile Phone	772-713-4471
Fax	772-569-9155
Email	billy@lambertcommercial.com
Website	lambertcommercial.com
Address	2945 20th St. Vero Beach, FL 32960

Description

8,000 - 23,000 SF MEDICAL – FOR RENT or SALE – 2300 3rd Court, Vero Beach, FL
FEATURES:
 - 2 Story Building - each floor Approx. 11,000 SF
 - Large Foyer and Entrance Area
 - 2 Conference Rooms
 - Can be easily Renovated into a Prestigious Office Building
 - Located in the Heart of Vero Beach
PROPERTY: 1.52 Acres with approx. 166' Frontage on 3rd Ct and 400' depth on 22nd Place
ZONING: C-1B
TAXES: \$13,942.45 (2012)
ASKING PRICE: \$1,900,000
LEASE PRICE: \$20.00 PSF

IndianRiverSites_Site4B

Property Report (2300 3rd Court)



Availability	
For Sale	Yes
Sale Price	\$1,950,000.00
Sale Terms	Cash
For Lease	Yes
Lease Rate	\$3.00/sf
Lease Type	Lease available to credit-worthy large, long term tenants. All terms negotiable.
Lease Terms	Negotiable

Property Details	
Site/Building Name	2300 Building
Street Address	2300 3rd Court
City	Vero Beach
County	Indian River County
Zip Code	32960
Type of space	Office, Retail
Min Size	22,500 sf
Max Size	22,500 sf
Last Updated	6/9/2014

Contact Information	
Contact Name	Dorothy Hudson
Email	DhudsonFL@gmail.com

Building Details	
Total Building sf	22,500 sf
Ground Floor sf	11,250 sf
Total Floor sf	22,500 sf
Building Material	concrete block
Number of Floors	2
Year Built	1974

Benefits of the 2300 Building:

- 1) **Central Location:** The 2300 Building offers a central location within the County and the City of Vero Beach. It is situated conveniently off the Indian River Boulevard, SR 60 and Royal Palm Blvd triangle. It affords easy access from the north and south County via US Highway 1 and Indian River Boulevard; from the west County via State Road 60; and, the barrier island communities via the Merrill Barber and Alma Lee Loy bridges between which the site is situated. It has a better proximity to the majority of school within the district than does the Storm Grove location.
- 2) **Residual Value:** A central in-town location with proper office zoning has real and lasting value. If there should ever be a desire to further expand or consolidate elsewhere, this building and this site have real value. Most planning experts agree that in the future we will see a consolidation and intensification of the core areas of our cities and towns and a trend away from sprawl and building on the edge. A building in the heart of the Miracle Mile will hold its value and most likely grow in value.
- 3) **Convenience and Comfort for the Public and other Users of the Building:** This location is close to stores and restaurants – the public and employees will have a positive experience when using the building – they can walk to eating, shopping and medical choices. Compare this to the 66th Avenue location which simply put is close to nothing.
- 4) **Impact Fees:** Impact fees have been paid on the building. The cost of impact fees is roughly \$10.17/square foot in the City of Vero Beach and \$10.37 in unincorporated Indian River County. The existing building was approved for a combination of office and medical uses. Impact fees for medical uses are even higher than office fees which mean the impact fees already paid for the existing building would allow rehabbing the current facility and building up to a total of 25,000 square feet without any additional impact fee payment.
- 5) **Room for Expansion:** The existing building area is 22,500 square feet. The City staff has expressed its willingness to consider the abandonment of the 23rd Street Right of Way immediately to the north of the property which will allow room for an additional 15,000 sf. This would require approval by the City of Vero Beach.
- 6) **Access to Public Transportation:** The Go Line Transportation System, Indian River County's public transportation, serves the 2300 Building with Route #1, going along Indian River Boulevard. The alternative site does not have a line passing in the vicinity.
- 7) **Communications:** It is also a prime location for communication and connection to several fiber optic networks.
- 8) **Safety:** This is a well trafficked, lit and patrolled area, situated on the edge of a retail and profession office epicenter. Several restaurants and local businesses in the immediate area operate into the later evening and night.
- 9) **Power Grid:** The building is on a main trunk line and high priority location within the City of Vero Beach power grid. When almost everything in Vero Beach was without power after the Hurricanes Frances and Jeanne in 2004 the proposed site had power. See City of Vero Beach Power Grid map attached.
- 10) **Solidly Constructed – Withstood Hurricane Impacts:** The structure is well and solid built, originally having been constructed for Southern Bell Telephone. It has survived the direct impact of five (5) hurricanes and a tropical storm ranging in strength upon making landfall in Vero Beach from Category 1 to Category 3: Wilma in 2004, Frances and Jeanne in 2003, Irene in 1999 (hit Vero as a Tropical Storm), Erin in 1995, and David in 1979.

Amenities

Property Description	
Property Description	See attached brochure for floor plan.

Contacts	
Company	Alex MacWilliam, Inc., Real Estate
Name	Dorothy Hudson, Commercial Manager
Phone	(C) 772.713.4748
Mobile Phone	(C) 772.713.4748
Fax	772.234.8126
Email	DHudsonFL@gmail.com
Website	www.alexmacwilliam.com
Address	2901 Ocean Drive, Vero Beach, FL 32963

Description

Bring your business, professional organization, retail or office to the ideal location for business. Located between Vero's bridges off of Indian River Boulevard and on the road to the Vero Beach Book Center and Fresh Market on Vero Beach's Miracle Mile. This location is convenient to the mainland and the island: US 1 and SR 60. Ample parking available for any type of professional use including professional office and medical. Build your future in Vero and be at the epicenter of the business/retail district!
 Pre-existing building with room for expansion, existing building has impact fees paid.



Appendix – Online Property Listings: IndianRiverSites.com

Site 5 (B) 1660 Old Dixie, Vero Beach



IndianRiverSites_Site5

Property Report (1660 Old Dixie)



Property Details

Site/Building Name 12,451 SF DOWNTOWN VERO WHSE.
 Street Address 1660 Old Dixie
 City Vero Beach
 County Indian River County
 Zip Code 32960
 Type of space Industrial
 Min Size 12,451 sf
 Max Size 12,451 sf
 Last Updated 8/28/2014

Contact Information

Company Lambert Commercial Real Estate, Inc
 Contact Name Ron Lambert
 Address 2945 20th Street
 City Vero Beach
 State Florida
 Phone (772) 778-2334
 Fax (772) 569-9155
 Email Ron@lambertcommercial.com
 Website www.lambertcommercial.com



Availability	
For Sale	Yes
Sale Price	\$895,000.00

Building Details	
Total Building sf	12,451 sf

Utilities	
Sewer Service	Yes
Sewer Provider	County
Water Service	Yes
Water Service Provider	County

Description

FEATURES:
 - Central Vero Beach Location!
 - 20 Foot Ceilings! - 2 Baths in South Building, 1 in North
 - Two (10 x 10) bay doors on South wall, one (10 x 10) bay door on West wall, each could be enlarged.
 - 18 ft. high interior door between bldgs.
 - Buildings are separately metered
 - Two central AC units
BUILDING: 12,451 SF Freestanding Building, divided into two buildings (6,195 SF and 6,256 SF) on two properties.
N-Bldg. all open with one office S- Bldg. has 1,786 SF Office on first floor and 1,206 SF on 2nd FL.
YEAR BUILT: North Building -1969 South Building -1965
LOT SIZES Two .24 Acre lots = .48 Acres
ZONING: Industrial
RE TAXES: \$5,912 (2013 - Both parcels)
UTILITIES: County Water & Sewer

1660 Old Dixie





Appendix – Online Property Listings: IndianRiverSites.com

Site 6 (S) 6255 U.S. Hwy. 1, Vero Beach



IndianRiverSites_Site6

Property Report (6255 US 1)



Property Details

Site/Building Name	1/2 AC to 5 AC U.S.1
Street Address	6255 US 1
City	Vero Beach
County	Indian River County
Zip Code	32967
Type of space	Vacant Land
Min Size	.5 acres
Max Size	4.9 acres
Last Updated	7/2/2014

Contact Information

Company	Lambert Commercial Real Estate, Inc
Contact Name	Ron Lambert
Address	2945 20th Street
City	Vero Beach
State	Florida
Phone	(772) 778-2334
Fax	(772) 569-9155
Email	Ron@lambertcommercial.com
Website	www.Lambertcommercial.com



Availability	
For Sale	Yes
Sale Price	\$1,200,000.00

Description	
FEATURES:	
- Located in Upscale Area of Rapid Development.	
- Drainage improvements paid	
- Water & Sewer Impact Fees paid	
- Traffic Impact Fees paid	
- All engineering, plans and Permitting paid	
- Concurrence fee outstanding	



Appendix – Online Property Listings: IndianRiverSites.com

Site 7 (B) 4401 77th Street, Vero Beach



IndianRiverSites_Site7

Property Report (4401 77th Street)



Availability	
For Lease	Yes
Lease Rate	\$7.00/sf

Description
PREMIUM WAREHOUSE – FOR RENT –
9,463 Square Feet In the Heart of Indian River County (4401 77th Street, Vero Beach, Florida)
FEATURES:
 - IDEALLY LOCATED IN THE CENTER OF INDIAN RIVER COUNTY'S GROWTH
 - REAR LOADING DOCK 10 x 12
 - HIGH 20 - 22 FOOT CEILINGS
 - GROUND LEVEL BAY DOOR 11 x 14
 - EXCELLENT ACCESS TO MAJOR ROADS
 - PART OF AN APPROXIMATE 4 ACRE INDUSTRIAL DEVELOPMENT
 - 208 3-Phase Power (400 Amp)

Property Details	
Site/Building Name	9,463 SF PREMIUM WAREHOUSE
Street Address	4401 77th Street
City	Vero Beach
County	Indian River County
Zip Code	32967
Type of space	Office, Industrial
Min Size	9,463 sf
Max Size	9,463 sf
Last Updated	8/29/2014

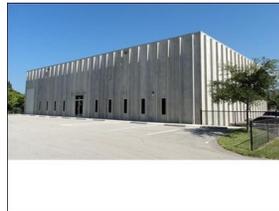
BUILDING SIZE:
Approx. 9,500 Square Feet

LAND SIZE:
Approximately 1 Acre

RENTAL RATE:
\$7.00 dollars PSF, (year 1)

PURCHASE: ASK AGENT
This building can be purchased if it is combined with either the 3,200 SF building behind this one, or the entire site which includes an additional 26,680 SF building.

Contact Information	
Company	Lambert Commercial Real Estate, Inc
Contact Name	Ron Lambert
Address	2945 20th Street
City	Vero Beach
State	Florida
Phone	(772) 778-2334
Fax	(772) 569-9155
Email	Ron@lambertcommercial.com
Website	www.Lambertcommercial.com



4401 77th Street





Appendix – Online Property Listings: IndianRiverSites.com

Site 9 (B) 10055 102nd Terrace (Macho Building), Sebastian



IndianRiverSites_Site9

Property Report (10055 102nd Terrace)



Property Details

Site/Building Name 10055 102nd Terrace
 Street Address 10055 102nd Terrace
 City Sebastian
 County Indian River County
 Zip Code 32958
 Type of space Industrial
 Min Size 30,000 sf
 Max Size 30,000 sf
 Last Updated 2/11/2014

Contact Information

Company Remax Crown Realty
 Contact Name John King
 Address 1603 US Highway 1
 City Sebastian
 State Florida
 Phone 772-589-3054
 Fax 772-589-7557
 Email JKing@RealtyKing.com
 Website www.RealtyKing.com

Availability

For Sale Yes
 Sale Price \$3,000,000.00

Building Details

Total Building sf 50,000 sf
 Building Material STE/RCN/ALM
 Ceiling Height Max 30 ft
 Number of Floors 1
 Heating System Electric
 Air Conditioning Yes
 Year Built 1999

Site Details

Lot Size 209088 sq ft sf
 Total Acres 4.8 acres
 Industrial Park Yes

Transportation

Nearest Interstate I-95
 Parking Ample

Utilities

Electric Service Yes
 Phase 3
 Water Service Yes
 Water Service Provider County

Description

30,000 SF lease in effect with 4 years remaining on 5 year lease for \$144,000/year plus CAM fees. 3 phase power, Concrete Block & Steel construction. Approx. 30' ceilings. 10 x 14 and 10 x 10 Bay Doors. 2 interior mezzanines. Fully air conditioned. Remaining 20,000 SF complete with separate utilities. Close to I-95, located on 4.8 acres.

10055 102nd Terrace





Appendix – Online Property Listings: IndianRiverSites.com

Site 11 (B) 4900 42nd Place, Vero Beach



IndianRiverSites_Site11

Property Report (4900 42nd Place)



Property Details

Site/Building Name	12,000 to 30,800 SF INDUSTRIAL WAREHOUSE
Street Address	4900 42nd Place
City	Vero Beach
County	Indian River County
Zip Code	32967
Type of space	Office, Industrial, Retail
Min Size	12,000 sf
Max Size	30,800 sf
Last Updated	7/2/2014

Contact Information

Company	Lambert Commercial Real Estate, Inc
Contact Name	Ron Lambert
Address	2945 20th Street
City	Vero Beach
State	Florida
Phone	(772) 778-2334
Fax	(772) 569-9155
Email	Ron@lambertcommercial.com
Website	www.Lambertcommercial.com



Availability

For Sale	Yes
Sale Price	\$2,194,500.00
Sale Terms	Call for details

Building Details

Total Building sf	30,800 sf
Manufacturing sf	27,500 sf
Office sf	3,280 sf

30,800+ SF Concrete Warehouses (Lot 5) For Sale and can be quickly activated! Industrial area with easy access to major traffic areas. Additional lots adjacent to property available for sale.

Property Description

- Lot 1 = 1.07 Acres \$5.00 PSF
- Lot 2 = 1.07 Acres \$4.50 PSF
- Lot 3 = 1.07 Acres \$4.25 PSF
- Lot 4 = .96 Acres \$3.80 PSF
- Lot 5 with 30k Building \$2,194,500

FEATURES:

- Located in IRC Enterprise Zone and HUB Zone
- Developing Industrial Area
- 27,500 SF in Warehouse, 3,280 in Off.
- Loading Dock Bay door
- 18 ft wide bay door X 16 ft. high!
- 1.56 Acre/3 phase power
- 20 ft. Ceilings / IG Zone
- Concrete Const., Fire Sprinklers

Building Description

- Loading Dock Bay door
- 18 ft wide bay door X 16 ft. high!
- 1.56 Acre/3 phase power
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Contacts

Company	Lambert Commercial Real Estate, Inc.
Name	Ron Lambert
Phone	(772) 778-2334
Mobile Phone	(772) 538-3930
Fax	(772) 569-9155
Email	ron@lambertcommercial.com
Website	www.Lambertcommercial.com
Address	2945 20th Street, Vero Beach, FL 32960

Description

30,800+ SF Concrete Warehouses (Lot 5) For Sale and can be quickly activated! Industrial area with easy access to major traffic areas. Additional lots adjacent to property available for sale.

FEATURES:

- Located in IRC Enterprise Zone and HUB Zone
- Developing Industrial Area
- 27,500 SF in Warehouse, 3,280 in Off.
- Loading Dock Bay door
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PRICES:

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- Lot 4 = .96 Acres \$3.80 PSF
- Lot 5 with 30k Building \$2,194,500

4900 42nd Place



Appendix – Regional Profile and Website Examples

Wyoming



Around here, your business is a BIG deal.

Every day Wyoming offers our phenomenal and expert business with an impressive bundle of financial and strategic advantages – one of the country's best overall cost of doing business ratings which includes low labor and utility costs, plus one of the most pro-business tax climates in the country – advantages we will spread as the place that every owner wants.

Take a closer look and discover what the most demanding business here already know and that is, while the state's recent high ranking on the "Big Blue" year, only in our vibrant pro-business culture that embodies our focus. Welcome your company's future here.

Wyoming is 1/3 right-to-work state.

FAVORABLE TAX CLIMATE
NO LOW

- State Income Tax
- Inventory Tax
- Sales Tax (no consumption tax)
- Low Property Tax

Low cost of doing business
Wyoming ranks the "Business Friendly" category as a whole near level – as well as low levels, overall. Because scores are based on key categories central to healthy business, the state has earned numerous "Top 10" and "10 place" rankings on these levels.

- **1st Best Business Climate Index** (Source: PwC America 2013)
- **1st Best Performing State Economy** (Source: PwC America 2013)
- **1st Best Buy State in America** (Source: PwC America 2013)
- **1st Lowest Electrical Prices per kilowatt (KWH)** (Source: Energy Research Center 2013)
- **2nd Lowest Business Failure Rate** (Source: PwC America 2013)
- **3rd, Pro-Business States** (Source: PwC America 2013)

Hearing the voice of business
Especially essential to start-up companies in highly regulated industries, a Wyoming open-door access to legislators means. Owing business and labor's direct access with the people who can most impact business in your Wyoming – and a more positive change does become access to decision makers in some managed better than in other states. This access, coupled with numerous grants, loans and financing programs, provide businesses with critical financial resources.

POPULATION & LABOR FORCE
Over the past few years Wyoming's population has been growing at a steady rate (1.1% a year) and has labor force growing nearly as much as that of the U.S. average. The significant availability of a solid labor force of skilled workers is business now and in the future.

AAA CREDIT RATING
While the nation's credit and performance indicators are mixed at best, Wyoming's credit rating has remained on solid ground. In fact, risk is reduced and the higher U.S. exposure of total revenues, oil and gas.

Wyoming Business Council • 800.262.3425 • www.wyomingbusiness.org

Transportation & Logistics

Wyoming is located at the crossroads of the West. You will find easy access to major economic markets, and the materials and resources your business needs to operate.

Three Interstate highways:
I-80 (1,000 mi)
I-25 (1,000 mi)
I-76 (1,000 mi)
#15 interstate miles cross Wyoming

Approx. 10 hr. drive time

National Highway System (NHS)

There are 10 commercial airports in Wyoming, with final destinations en route to major cities around the world. Wyoming airports have six domestic routes: Boulder, the Wyoming, Delta, Frontier, Great Lakes, Horizon, Mesa, Northwest, Sky West, United Express, and United.

These major international airports that the state in Billings, MT, Denver, CO and Salt Lake City, UT.

Two class one railroad connect Wyoming to major markets.

Wyoming Business Council • 800.262.3425 • www.wyomingbusiness.org

Being near the center of North America makes you the center of attention

Being near the geographical center of North America has transformed Wyoming into the center of attention for an increasing number of companies whose business is moving and storing goods, and who value optimal connectivity to major markets. Wyoming delivers. Given the state's robust transportation infrastructure and solid open space to handle the distribution and warehousing needs of a variety of businesses, it's easy to see why Transportation and Warehousing are among the fastest growing employment sectors in the state.

1,207,444 consumers within a 500 mile radius of Wyoming can be reached within 8 hours. (Source: PwC America 2013)

Transportation
Centrally located in North America, Wyoming is an ideal launch point for commerce. Consumer goods, as well as other materials needed to produce those goods, are easily transported by means of air, trucking and sophisticated network of highways, air, and rail options.

- **1-50** miles from New Jersey to California, bisecting Wyoming
- **1-50** miles from Massachusetts to Washington, bisecting Wyoming
- **1-25** miles from Mexico to Wyoming and into 1-50

915 miles of interstate crisscrosses Wyoming. Highway to further extend the reach of commerce, nearly 1,115 connects to Utah, Arizona and Canada, and is accessible either via I-80 or I-90.

The intersection of location and low cost
While Wyoming's location is a major benefit to Transportation and Warehousing companies, the state's demonstrably low cost of doing business when the region's business appeal is a solid one too.

FAVORABLE TAX CLIMATE
NO LOW

- State Income Tax
- Inventory Tax
- Low Sales Tax (no consumption tax)
- Low Property Tax

Wyoming Business Council • 800.262.3425 • www.wyomingbusiness.org

Wyoming Knows Mining & Energy

Wyoming has a reputation as one of the most natural resource-rich geographies in the world, and for good reason. It's the 1st natural producer of coal, bauxite, iron, soda ash, and uranium.

It's also ranked in our state, third in natural gas production and second in oil production. In fact, an amazing 40 percent of U.S. and 60 percent of Wyoming's oil production is produced in our state. Wyoming is also the largest U.S. exporter of coal reserves, oil and gas.

Value-Added Mindset
Wyoming is laser-focused on exploring new and innovative ways to add value to its raw materials. In a partnership that is uncommon in other places but typical for Wyoming, researchers, legislators, and business people are working together to research new technologies. Two demonstration examples include:

- The Wyoming Business Council, Idaho National Laboratory (INL), and the University of Wyoming School of Energy Resources have partnered to research the viability of manufacturing the next generation of energy resources into higher value products.
- The "Handbook of Mining Coal Classification and Feedstock Plans in Wyoming" study conducted by the Wyoming Business Council, the Idaho National Laboratory, the University of Wyoming, and the Wyoming Geological Survey reduces time and costs for companies conducting coal geologic analysis and natural gas geoscientific plans in Wyoming.

Highlight on mining & energy industry

- **#1** in natural producer of:
 - Coal
 - Bauxite
 - Iron (oxide ash)
 - Uranium
- **#2** in Natural Gas production
- **#3** in Crude Oil production

Wyoming Business Council • 800.262.3425 • www.wyomingbusiness.org

The right people in the right place to move goods

The region's abundant and highly educated workforce is a strong fit for the Transportation and Warehousing sectors. Wyoming ranks first in the U.S. in percentage of people 25 years and older who have a high school diploma or higher (92.3%). Source: Bureau of Economic Analysis, Bureau of Economic Analysis, 2007.

Additionally, 23.6% of Wyoming residents (25 years or older) hold a bachelor's degree. Source: American Community Survey, 2010.

Wages
In fact, transportation that support Transportation and Warehousing enterprises. Wyoming's average hourly wage is lower than the US average.

WYOMING TRANSPORTATION AND WAREHOUSING WAGE COMPARISON (MEAN HOURLY WAGE)

SELECTED OCCUPATIONS	WYOMING	UNITED STATES
Management Occupations (11-000)	\$39.36	\$51.04
Transportation, Storage, and Distribution Managers (11-971)	\$40.38	\$42.25
Transportation Occupations (43-000)	\$22.47	\$26.00
First-Line Supervisors of Production, Craft, and Repair Workers (53-101)	\$21.79	\$22.52
Transportation Workers, All Other (43-000)	\$14.87	\$17.42
All Occupations (except 11-000)	\$20.44	\$24.14

UNIONIZATION RATE
Wyoming: 11.8%
U.S. Average: 7.2%

POPULATION & LABOR FORCE
Wyoming: 568,158 (Population), 312,000 (Labor Force)
U.S. Average: 312M (Population), 147M (Labor Force)

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Appendix – Regional Profile and Website Examples

Joint Economic Development Initiative of Southern Ohio (JEDISO)



LOGO: JEDISO The Joint Economic Development Initiative of Southern Ohio

STAGINE: JEDISO The Joint Economic Development Initiative of Southern Ohio

COMPETITIVE POSITION: Will submit for the targeted target industries. Strategic location to access target suppliers and markets. Large inventory of available sites and buildings. Large and diverse manufacturing workforce. One of the most favorable business climates in the country.

PHOTOGRAPHS: Manufacturing, Transportation, Professional & Technical, Headquarters & Regional Offices

STRENGTH IN NUMBERS - STRENGTH IN CHARACTER: Where else in the country could you reach 110 million people within a day's drive? Have you driven or over 3 million square feet of industrial buildings, warehouses, open buildings, and thousands of acres of available sites from which to choose? Is a cost of living that is 15% below the US average, with median home prices below \$100,000 and competitive wages? It's no wonder that industry leaders such as General Motors, GE Aviation, AllClare, and Bellco Foods choose to locate their operations in Southern Ohio.

STRENGTH OF CHARACTER: Above all, it's the skilled and dedicated workers that set the Southern Ohio region of Jackson, Pike, Ross, and Scioto Counties apart. With 180,000 laborforce within commuting distance (14 counties) and a 20,000 laborforce within the four counties, area employers boast employee productivity, work ethic, and low turnover rates among the region's advantage of operating here. Our region is home to multiple post-secondary educational institutions and it also has many excellent training providers and academies.

FAVORABLE TAX CLIMATE: No Taxes On: Corporate profit and franchise, New machinery and equipment, Out-of-state sales, Inventory. Flat Taxes On: Companies with sales of 150,000 - \$1 million.

THE COMPANY WE KEEP: Hundreds of businesses are located in Southern Ohio, from smaller consumer package goods to entrepreneurial, high-tech and heavy industrial companies. This is largely due to the region's strong history of industry and our prime location on the Ohio River along with several major highways. Many companies have also chosen to have their headquarters or regional offices in the region, providing high visibility and transportation access.

QUALITY OF LIFE: Located in southern Ohio, in the beautiful Ohio River Valley, our communities have world-class healthcare, top-notch schools, four seasons, low traffic and lots of recreational and cultural activities.

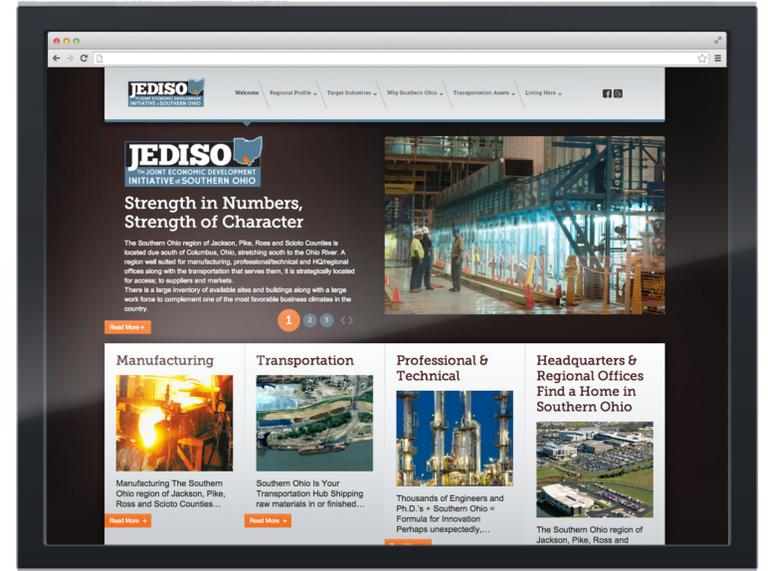
A BUYER'S MARKET: The median home cost in the Southern Ohio region is just under \$100,000. A wide variety of housing stock is available, from rental housing to executive residences and everything in between.

AFFORDABLE HOUSING: The median home cost in the Southern Ohio region is just under \$100,000. A wide variety of housing stock is available, from rental housing to executive residences and everything in between.

RECREATION AND CULTURE: Our fair county region is the heart of Ohio's Appalachian County. Home to historic natural and cultural sites as well as communities that are brimming with arts, entertainment and recreation. Included in the region are some of Ohio's premier settlements, ancient workmanship, state parks and an abundance of great food and fun. Outdoor recreation opportunities include everything from golf, kayaking and boating to hunting and fishing, to name just a few.

EDUCATION: Excellent education is highly accessible in Southern Ohio, with some of the best K-12 primary education in the state and numerous options for higher learning, including state universities, technical schools, and community colleges. Ohio's public colleges, universities, and adult education programs serve almost 600,000 students and offer every option from a GED to a Ph.D., ensuring that all Ohioans have easy access to a high-quality, affordable higher education.

DRAG BOARD



Choose Southern Ohio

Grow with the strengths of Jackson, Pike, Ross, and Scioto Counties

110 Million People within 500 Miles

Strength in Numbers: Where else in the country could you reach 110 million people within a day's drive? Have you driven or over 3 million square feet of industrial buildings, warehouses, open buildings, and thousands of acres of available sites from which to choose? Is a cost of living that is 15% below the US average, with median home prices below \$100,000 and competitive wages? It's no wonder that industry leaders such as General Motors, GE Aviation, AllClare, and Bellco Foods choose to locate their operations in Southern Ohio.

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Affordable Housing: The median home cost in the Southern Ohio region is just under \$100,000. A wide variety of housing stock is available, from rental housing to executive residences and everything in between.

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Joint Economic Development Initiative of Southern Ohio (JEDISO) | 740.855.2728 | ChooseSouthernOhio.com

JEDISO The Joint Economic Development Initiative of Southern Ohio

Transportation and Logistics Hub

Quality of Life

A Buyer's Market

Affordable Housing

Recreation and Culture

Education

Joint Economic Development Initiative of Southern Ohio (JEDISO) | 740.855.2728 | ChooseSouthernOhio.com

JEDISO The Joint Economic Development Initiative of Southern Ohio

Quality of Life

A Buyer's Market

Affordable Housing

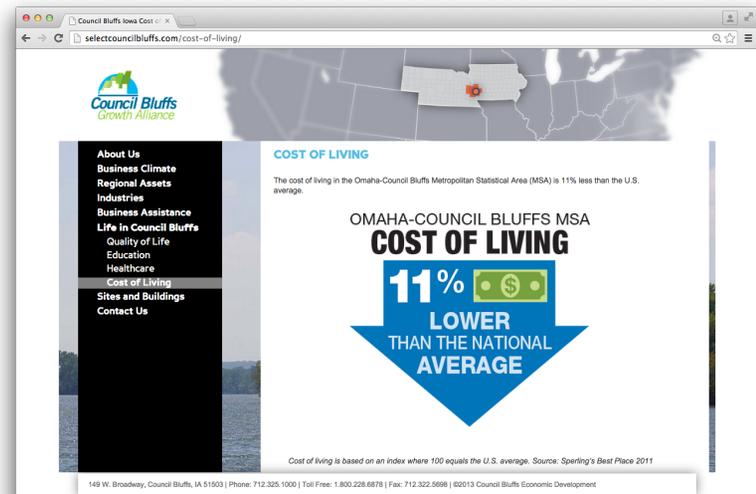
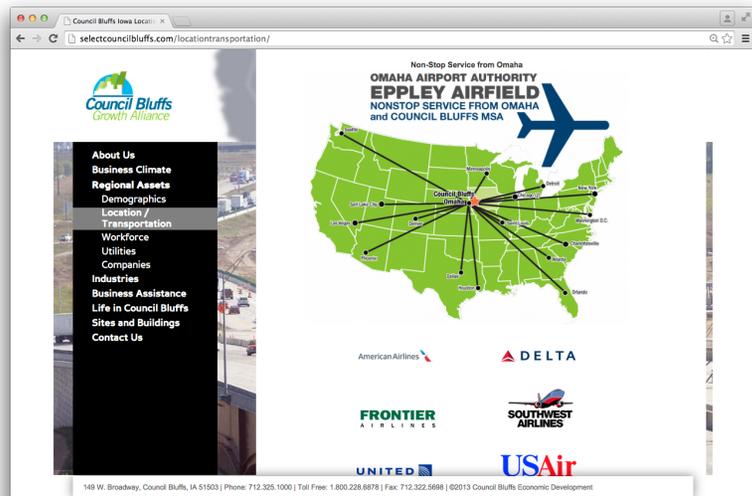
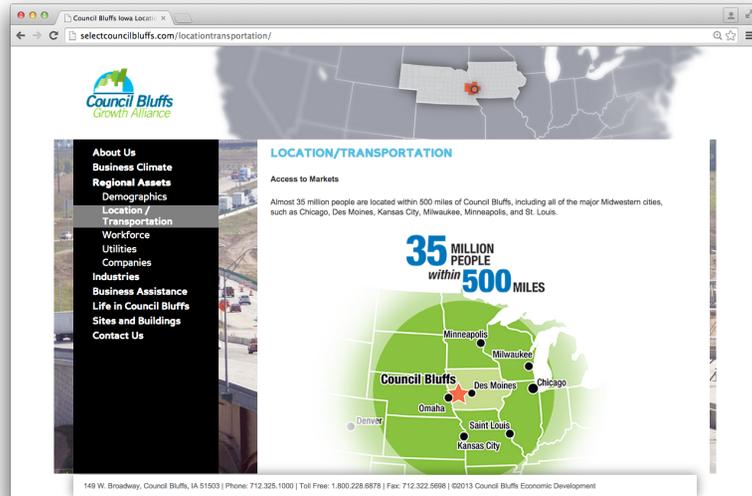
Recreation and Culture

Education

Joint Economic Development Initiative of Southern Ohio (JEDISO) | 740.855.2728 | ChooseSouthernOhio.com

Appendix – Regional Profile and Website Examples

Council Bluffs (IA)





Ady Advantage is a specialized economic development marketing consultancy. We bring a rare combination of corporate experience, economic development knowledge and an approach that helps identify those economic assets that really differentiate a location.

Given our position as both site selectors and marketers, we can shed practical light on how an organization can break through the clutter to reach its target audiences with a compelling message.

For additional information, please contact:

Janet Ady, President and CEO

Office: 608.663.9218 Mobile: 608.345.2510

jady@adyvoltege.com

www.adyvoltege.com