



KCoDE Vision & Strategic Plan

TALLAHASSEE

- Environmental Scan completed
- Broadband Market Profile completed
- Community Asset Inventory completed
- Industry Profile (EMSI) completed



Tallahassee

Executive Summary



Tallahassee, the capital city of the fourth largest state in the United States, encompasses about 15% of the Leon county's land area and approximately 65% of the county's population. Tallahassee enjoys a relatively stable economy and a comparatively low unemployment rate, below both the Florida and national unemployment rate. Tallahassee businesses have access to a labor force in which more than 41% of working adults hold college degrees. Inc. magazine has ranked Tallahassee among the "Best Small Metro Areas to start and grow a business." The fastest growing business sectors are telecommunications, computer hardware vendors, software developers, and trade associations. Tallahassee is the only incorporated city within Leon County.

Florida's economy is going to get worse before it gets better, and lawmakers will have to deal with a \$2.3 billion shortfall to balance the \$66 billion budget, economists told lawmakers in January. The weak economy is hurting sales tax revenues, leading to government cutbacks that have hurt Leon County in particular. Along with stagnant job growth, housing starts locally are expected to remain depressed through 2009.

November unemployment figures, the latest available, show Tallahassee and Florida continuing to lose jobs at a steady rate. One of the bright spots, however, is Florida's expanding health sector, says a University of Central Florida economist. Tallahassee's healthcare industry is following a similar track. Health is the only sector that's growing in Tallahassee's economy, according to Sean Snaith, director of the Institute for Economic Competitiveness at the University of Central Florida.

Existing home sales plunged 8.6% in November to 4.49 million from a downwardly revised pace of 4.91 million in October, according to the National Association of Realtors. The median sales price fell by the largest amount on record, plunging 13.2% in November to \$181,300, from \$208,000 a year ago. That was the lowest price since February 2004 and the biggest year-over-year drop since the index began in 1968.

Unemployment in Tallahassee:

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
2008	3.4	3.1	3.4	3.2	4.1	4.6	5.3	5.3	4.9	4.9	5.1

Infrastructure & Capabilities

Municipal Broadband Status

The City of Tallahassee has explored and instituted various wireless initiatives across sectors in the community. It was one of the original partners in creating the Digital Canopy wireless broadband (WiFi) project in the downtown area. The district is now experimenting with integrating technology in the school classroom including laptops for students and wireless classrooms. Plans are in place for public utility meters in the City of Tallahassee (electric, water and natural gas) to be upgraded with a secure wireless communication module that will enable numerous benefits now and in the future. Finally, funding is underway to support healthcare entities seeking to utilize telemedicine practices to improve patient care.

- In January 2002, the City of Tallahassee was one of the original partners in creating the Digital Canopy wireless broadband (WiFi) project in the downtown area, contracting with Hayes Computer Systems to maintain the Digital Canopy. The WiFi service is available at the Tallahassee Regional Airport and covers the terminal area. The City of Tallahassee provides wireless services in

downtown Tallahassee and at the Tallahassee Regional Airport for citizens at no charge for usage. Real time statistics are supposed to be available at <http://wifiservices.hcs.net> (although the site is not currently working).

- Among 66 of the largest metro areas in the country, including 16 in Florida, Tallahassee ranks 11, according to a recent study done by Tim Lynch, director of Economic Forecasting & Analysis at Florida State University. But the city comes in last -- at 66 -- on its broadband telecom capacity.

Leadership & Champions

Anchor Institutions (Source: Knight Foundation Snapshot -Tallahassee)

- State of Florida (31,650) – includes all government jobs in Tallahassee
- Florida State University (8,784) – includes all faculty and staff
- Florida A&M University (2,681) – includes all faculty and staff
- Tallahassee Community College (1,885) – includes all faculty and staff
- Tallahassee Memorial Healthcare (2,750) – not for profit hospital serving the region
- ACS (1,200) – A global IT outsourcing company that administers several state and federal contracts

Chamber of Commerce List

<i>Tallahassee Largest employers</i>	<i>Number of employees</i>
State of Florida	25,204
Florida State University	8,784
Leon County Schools	4,403
City of Tallahassee	3,327
Tallahassee Memorial Healthcare	2,850
Florida A & M University	2,681
Publix Super Markets	2,000
Leon County	1,522
Tallahassee Community College	1,090
Sprint	740

Finance & Funding

Knight Foundation Granting area – Leon County; Knight Foundation is one of 28 grant makers supporting 370 nonprofits (circa 2006). Since 1967 they have invested over \$17.2M and from 2001-2006 over \$5.8M or approximately 28% of the total grant dollars in the local market.

Top 50 Recipients of Foundation Grants in the State of Florida, circa 2006 (source: Foundation Center)

<i>Recipient</i>	<i>City</i>	<i>Dollars Awarded</i>	<i>No. of Grants</i>
Florida State University	Tallahassee FL	2,721,035	11
Florida Department of State	Tallahassee FL	1,177,350	2

Community Issues

- A new institute dedicated to Tallahassee’s economic prosperity will be created at Tallahassee Community College, thanks to a grant from the John S. and James L. Knight Foundation. The Knight Creative Communities Institute strives to attract and retain young professionals and develop a more adaptable workforce for Florida’s capital city. It will build on the momentum created by the successful Knight Creative Class pilot project over the last two years. The effort produced the Tallahassee Film Festival, the environmental group Sustainable Tallahassee and the Get Gaines Going initiative to turn the street into an arts and entertainment district. The Institute will be launched with a \$570,000 grant from Knight Foundation.
- Feb 3, 2009, Tallahassee Mayor John Marks hosted a luncheon forum featuring a panel of elected officials and mobile technology experts discussing how wireless technologies are providing Floridians with the latest communications tools. The discussion at the Governors Club highlighted the leadership that has paved the way for innovative wireless applications across Florida, including mobile technologies for public safety officials and digital consumer entertainment products. Marks discussed the many innovative ways the city is using wireless applications. Also speaking was Commissioner Katrina McMurrian of the Florida Public Service Commission. She has extensive experience in regulatory policy issues involving energy, water, and advanced communications policy. She covered the policies on broadband, wireless and emerging technologies. Also speaking was Rear Admiral Robert Duncan of Rivada Networks, a leading designer, integrator and operator of public safety communications and information technology for homeland security forces and first responders. Duncan discussed innovative, reliable and cost-effective wireless public safety solutions. The program is a project of Mobile Future, a broad-based coalition of businesses, nonprofit organizations and individuals interested in the promotion and development of wireless technology and services.