



THANK YOU TO OUR HOST



Welcome

Dr. Judy Genshaft
President, University of South Florida
Tampa Hillsborough EDC Chair

Call to Order

Dr. Judy Genshaft
President, University of South Florida
Tampa Hillsborough EDC Chair

Consent Agenda

Dr. Judy Genshaft

President, University of South Florida

Tampa Hillsborough EDC Chair

- **BOD Meeting Minutes – January, 2019**
- **Meeting Minutes – November 29, 2018**
- **Departmental Reports**

Committee Reports

- **Business Development** – C.J. Mintrone, PNC Bank
- **Marketing** – Tim Moore, Diamond View
- **Investor Relations** – Melanie Williams, Frontier Communications
- **International** – Jason Woody, Lions Eye Institute for Transplant and Research

Finance and Administration

Marie Chinnici-Everitt

**Vice-Chair and Finance Committee Chair
DTCC**

- **Financial Update**
- **Investment Policy (action required)**
- **Document Retention Policy (action required)**

Old Business

- Tampa Bay Economic Prosperity Foundation Update – Dr. Ken Atwater/HCC
- 2019 CEO Perception Study Results – Michelle Bauer, Chief Operating Officer



TAMPA BAY

ECONOMIC PROSPERITY
FOUNDATION

TOP TAKEAWAYS FROM 2019 CEO PERCEPTION RESEARCH

Michelle Bauer
Chief Operating Officer
Tampa Hillsborough EDC

TOP 5 REASONS CITED TO MOVE OR ESTABLISH A NEW HEADQUARTERS FACILITY (UNAIDED RESPONSES)

- Ability to attract qualified employees: 69% (+57% from 2014)
- Move to a more cost-effective location: 52%
- Fewer bureaucratic requirements: 52% (+14% from 2014)
- Lower taxes: (44%)
- More favorable labor environment: 41% (+31% from 2014)

OTHER ISSUES THAT HAVE SIGNIFICANTLY INCREASED IN IMPORTANCE AMONG NATIONAL HQ EXECUTIVES SINCE 2014

- Employee housing options +29%
- Cooperative local government +20%
- Quality of public k-12 +19%

BIGGEST DISADVANTAGE OF DOING BUSINESS IN TAMPA

- **Transportation Infrastructure**
 - **National HQ companies**
(2014 = 40%; 2019 = 69%)
 - **Tampa HQ companies**
(2014 = 66%; 2019 = 76%)

POSITIVE PERCEPTIONS OF TAMPA (UNAIDED RESPONSES)

- Housing options, availability and cost: 49% mentioned as positive; **up 17%** since 2014 (32%)
- Ability to attract quality employees: 39% mentioned as positive; **up 10%** since 2014 (29%)
- Quality of life: 32% mentioned as positive; **up 15%** since 2014 (17%)
- No personal income taxes (81%); pro-business state and local govt (79%): these already positive perceptions both went **up by 6% and 7%**, respectively
- Skilled workforce: 46% (**up 6%** from 2014)

NEGATIVE PERCEPTIONS OF TAMPA (UNAIDED RESPONSES)

- **Transportation infrastructure – 62% cited it as a negative compared with only 39% in 2014 – a 23% increase.**
- **K-12 education: 32% cited as a negative; up 9% from 2014**

CONSIDERABLE IMPROVEMENTS IN TURNING AROUND NEGATIVE PERCEPTIONS (UNAIDED RESPONSES) FROM 2014:

- **Lack of qualified employment base: 41% cited as a negative in 2014; only 27% mentioned it in 2019.**
- **Tampa not viewed as an HQ location for major organizations: 30% said so in 2014; only 9% did in 2019.**
- **Quality of life beyond beaches: 19% reported this as a negative in 2014; only 11% did in 2019.**
People are getting the message that there's much more here than water and sand.

New Business

President's Report

Craig J. Richard, CEcD, FM
President & CEO
Tampa Hillsborough EDC

Operations Update

I. Finance & Administration

- ✓ Strong Year over Year Performance

II. Business Development

- ✓ 4 Announcements
 - Jobs - 162
 - Capital Investment - \$129MM
- ✓ Project Pipeline
 - 91 projects
 - 9 projects in final stages (691 jobs, \$89MM cap ex)

III. International

- ✓ Next Export Mission: Brazil, August 12



Investor Development

- I. ED Talks! – March 29, 2019, 7:30-9:30am @ One Buc Place
- II. Investor Satisfaction Survey – 4/1



Brightline and the Impact of Transit Oriented Development

Featuring

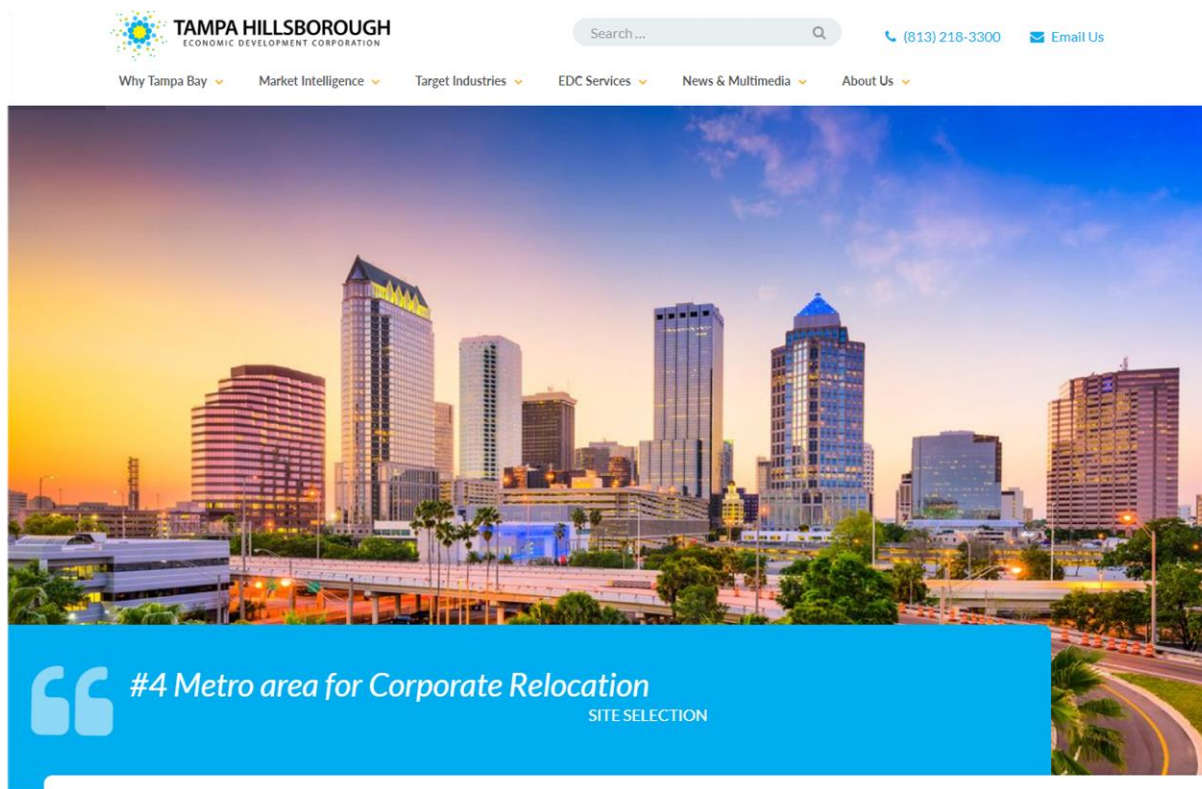


Bob O'Malley

Vice President of Government Affairs, Brightline

Marketing

- I. Redesigned Web Site
 - Simplified Navigation



Marketing

- I. Redesigned Web Site
 - New GIS Interface

The screenshot displays the Tampa Hillsborough Economic Development Corporation's new GIS interface. The header includes navigation links such as "WHY TAMPA BAY?", "TARGET INDUSTRIES", "INVESTORS", "INTERNATIONAL", "BUSINESS SERVICES", "DATA CENTER", "ABOUT US", "MAKE IT TAMPA BAY", "MEDIA CENTER", "SITE SELECTION", and "LOG IN". The main navigation bar shows "PROPERTIES" and "COMMUNITIES" tabs, along with "Community Layers", "Demographic Layers", "EMSI Layers", "Custom Reports", "Clear Map", "Share", and "My Favorites 0".

The interface is divided into several sections:

- SEARCH:** Includes dropdowns for "Property Type" (set to "All") and "Property Subtype" (set to "All"). It also has "City" and "County" dropdowns. Filter options include "For Lease", "For Sale", "For Sale and Lease", "Filter by Map", and "Show Properties On Map".
- RESULTS Sorted By Featured:** Lists four featured properties with details such as "I-4 Corporate Park (Site 217)", "49 Acres MOL", "10 ACRES LAND NEAR PORT IN GIBSONTON - PRICED RIGHT!", and "10.54 Acres Industrial Land- New Price".
- LAYERS:** A panel on the right side of the map showing active layers: "Opportunity Zones", "Competitive Sites", "Infrastructure", "Education", "Recreation", "Broadband", and "Admin Boundaries".
- Map:** A map of the Tampa Bay area with various colored overlays representing the selected layers. Major cities like St. Petersburg, Tampa, and Plant City are labeled.

Marketing

I. Redesigned Web Site

– Investor Portal



INVESTOR PORTAL

| Executive Committee | | | |
|---------------------|---|------------|--|
| Board Of Directors | | | |
| | Board of Directors | 01/22/2019 | |
| | New Board Member Orientation | 11/07/2018 | |
| | THEDC FY2017 990 – Public Disclosure Copy | 09/30/2018 | |
| | Final Financial Statements THEDC FY2018 | 09/20/2018 | |
| | Dated, Amended, and Restated By-Laws Approved | 01/24/2017 | |
| Investor Documents | | | |

Circle of Champion Investors



Let us help you find the perfect location

NEWS
Mosaic relocates headquarters to Hillsborough County.
LEWIS BENNETT | 2 DAY AGO

International Business Services.
Let us help you expand into new markets by exporting overseas or investing in Tampa and Hillsborough County

“ Tampa Bay’s 80+ colleges and universities are producing the talent you need to fuel your growth ”

Become an Investor
We need your leadership to help shape our region’s economic future

Local Business Services
We’re proud of Tampa’s homegrown companies and are here to help you prosper

Marketing

I. Redesigned Web Site

– Infographic Rich

We're closer than you think!



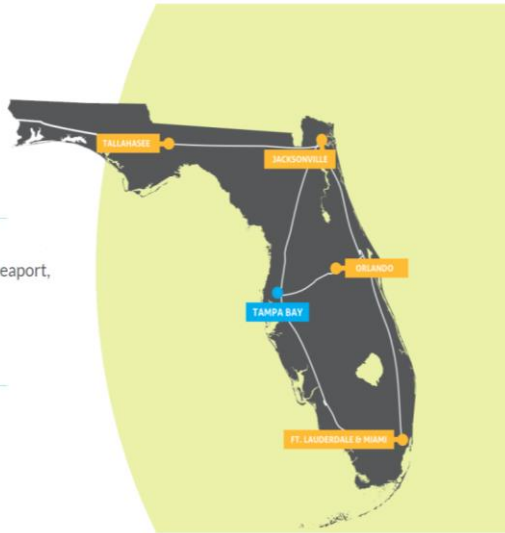
Access to 34 million consumers within an 8-hour drive



Home to Florida's largest seaport, Port Tampa Bay



Nonstop service to 90+ domestic and international destinations via TPA



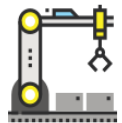
Information Technology



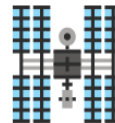
Corporate Headquarters



Financial & Professional Services



Manufacturing



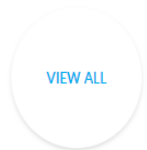
Defense & Security



Logistics & Distribution



Life Sciences & Healthcare



Investor Announcements

- Diverse: Issues in Higher Education announced Dr. Ken Atwater will be the recipient of this year's Diverse Champions Award
- Joe Lopano was named director of the year, large airport by Airport Experience News
- Port Tampa Bay welcomed another new container service – CMA CGM, and CEO Paul Anderson was featured on WEDU's Suncoast Business Forum
- USAA opened its second office building at its Crosstown Center campus



Adjourn