

MOVING FORWARD TOGETHER

GULF COAST REGIONAL SCAN 2017

GULF COAST
COMMUNITY
FOUNDATION

WHAT IS A REGIONAL SCAN?

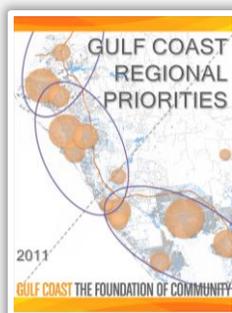
Gulf Coast exists because of our region's communities and for each individual. We transform our region by working with our donors, nonprofits, public agencies, private businesses, and civic volunteers.

We continue to set an ambitious agenda for regional impact by both addressing immediate needs and planning for transformative, longer-horizon initiatives. This agenda is rooted in research and fieldwork. For the past decade, Gulf Coast has undertaken regular regional scans to learn what is happening in our region and what challenges face our community members, donors, and public and private partners. We rely on perspectives from these partners, backed with hard data, to establish regional priorities and generate ideas and initiatives for action.



2009 Regional Priorities

Retention of Youth
Resource Management
Economic Diversification
Fulfilling Immediate Needs
Coordination and Communication
Civic and Social Capital Building



2011 Regional Priorities

Revitalize and Diversify Economy
Provide a Competitive Workforce
Strengthen Social Service Delivery
Leverage and Coordinate the Arts
Develop Social and Civic Capacity
Manage Environmental Assets



2013 Regional Priorities

Address Root Causes of Poverty
Expand Recreational Access
Welcome a Diverse Population
Close School Achievement Gaps
Prepare the Workforce of Tomorrow
Develop Economic Clusters
Grow an Entrepreneurial Ecosystem

Beginning in 2009 and continuing in 2011 and 2013, Gulf Coast has interviewed regional leaders, identified trends, and examined data to establish regional priorities. This scan is a sampling and is not intended as a statistically significant survey of our region. We use this information to align our grantmaking and initiatives, be responsive to our partners, and set our priorities and agenda for action. Regional scans help Gulf Coast increase the visibility and awareness of significant regional issues, develop strategic initiatives, and generate new partnerships and platforms for change. The 2013 regional scan, *After the Fall*, led to initiatives to diversify our economy, improve the skills of our workforce, and help homeless families find opportunity after the Great Recession.

For this 2017 regional scan, we again listened to and learned from over two dozen regional leaders and coupled that input with data and research. This edition of the Gulf Coast Regional Scan serves as a shared roadmap and establishes common strategic imperatives and regional priorities for the future. Gulf Coast is grateful for the contributions of our many regional partners who participated in this scan and will engage with us on future strategic initiatives and actions.

Regional scans help Gulf Coast increase visibility and awareness of significant regional issues, develop strategic initiatives, and generate new partnerships and platforms for change.

WHERE HAVE WE BEEN? – OUR HISTORY OF COLLABORATION

The barriers facing the Gulf Coast are not new and they are not unique. Our region has been grappling with issues related to infrastructure, growth, housing, the environment, youth retention, poverty, and education for decades. No matter our struggles with identity and the future, the region has always worked toward cooperation and collaboration. However, with increasingly divisive politics, competition for scarce public resources, and growing demands on our civic and nonprofit systems, our ability to work together toward shared solutions is at risk.



The following quotes from the Sarasota Herald-Tribune and Sarasota Journal over the last century highlight many of the same issues we continue to address today:¹

- 1926** “When you let John or Mary leave – you may have had a budding Lincoln, Edison, Ford – a ‘future great.’ Do your part in making Sarasota a better place to live and thrive.”
- 1932** “Just sit down and jot down all the tourist attractions that Sarasota has to offer...Then check them against the advantages of other communities – then go to work to ‘Forward Sarasota.’”
- 1934** “...[T]here has existed a central welfare unit, in Sarasota, organized...for the purpose of providing central headquarters that would check up on all organized and individual charity to prevent duplication.”
- 1955** “...We as individuals and citizens of this great community of Sarasota wish to express our appeal ... [to] those who are financially capable of giving their sons and daughters a college education; it must be taken into consideration that those having equal abilities but under a financial burden are being neglected.”
- 1956** “Sarasota’s fabulous growth from 1950 to 1955 was the largest percentage gain in the United States. 1956 saw this growth expand at a brisk pace outside the City of Sarasota. Areas formerly good for hunting rabbits and orange groves have been plowed under, canals dug, artificial lakes created, and residential homes raised in their stead.”
- 1963** “There will be growth. But it does not mean there will be progress unless there is planning... We are striving to retain our attractive community image while providing the services demanded by growth.”
- 1978** “While welfare and public aid can provide temporary relief to the poor, local officials and the poor themselves agree the only solution to poverty in Sarasota is to train and find jobs. If you can get a good job and you work hard, you can get out.”
- 1999** “Sarasota County’s high housing prices are forcing working families to live elsewhere.... More affordable housing near employment centers such as hospitals would allow more people to walk to work and would limit traffic problems...”

Today, the Gulf Coast is working to revive our history of collaboration and partnerships. Our region has come together before to address significant regional challenges, including bridges, roads, water, and future development and land use. Given the enormity and complexity of the issues still facing our region, now more than ever we need to work together to generate new solutions and establish new partnerships.

WHAT DOES THE FUTURE HOLD? – UNCERTAINTIES AND RISKS

We asked regional leaders what our shared vision for the Gulf Coast should be and what we as a region should aspire to be. Recurring and critical themes that emerged from discussions suggest that, as a region, we can: be more inclusive, be more caring, be more proactive, and be more willing to work together and reach forward.

Leaders suggest that the Gulf Coast's greatest strengths and assets—our quality of life, our natural areas, our cost of living, our schools, and our people—are at risk. We are currently living in a period of significant disruption and growing uncertainty about the future. Growth, diversity, development, technology, innovation, globalization, and climate trends will have real impacts on our region in the near future. The emerging risks and future needs identified by regional leaders in this scan represent significant challenges that we, as a region, will have to face together.

| Emerging Trends | Future Needs |
|--------------------------------------|--|
| Aging population | <p>40% of Sarasota County residents will be age 65 or over in 2030ⁱⁱ</p> <ul style="list-style-type: none"> – Develop transportation systems and mobility services to support older residents. – Align nonprofits and providers to fill demand for health care and well-being of older residents. |
| Growing diversity | <p>1 in 5 Sarasota County residents will be of minority race or ethnicity in 2030ⁱⁱⁱ</p> <ul style="list-style-type: none"> – Recognize and celebrate differences in cultures, races, and ethnicities. – Create education and civic systems to support new and more diverse residents. |
| Widening inequalities | <p>13th highest ranked income inequality in Sarasota County among all Florida counties^{iv}</p> <ul style="list-style-type: none"> – Create job opportunities for lower-income residents to earn a living wage. – Address growing cost burdens so workers can both live and work in the region. |
| Increasing vulnerability | <p>68% of Sarasota County residents believe 'climate change is happening'^v</p> <ul style="list-style-type: none"> – Plan for future climate risk and take steps to mitigate future costs. – Protect our beaches and natural destinations from extreme weather and erosion. |
| Deteriorating quality of life | <p>#1 threat to the Sarasota County economy in resident surveys is transportation^{vi}</p> <ul style="list-style-type: none"> – Address congestion and growth pressures to continue to compete as a destination. – Support arts and cultural institutions to adapt to changing donor bases and technology. |
| Declining civic capacity | <p>1/3 of Sarasota County workforce will be eligible to retire by 2020^{vii}</p> <ul style="list-style-type: none"> – Continue to build public support and funding for schools, arts, and conservation. – Strengthen public and civic institutions to increase capacity and replace retirees. |
| Expanding needs | <p>145% increase between 2005 and 2015 in Sarasota County households receiving nutrition assistance^{viii}</p> <ul style="list-style-type: none"> – Fund needed improvements to existing roads, water, broadband, and other infrastructure. – Direct sustainable growth and development in the future. |
| Lagging resilience | <p>45% of net new jobs created in Sarasota County between 2005 and 2015 paid below average annual wages^{ix}</p> <ul style="list-style-type: none"> – Diversify our economy to protect against future economic downturns and create opportunity. – Support financially vulnerable residents with education and resources. |

These long-term uncertainties will shape our region in the future and demand attention. However, many of our region's residents also face day-to-day uncertainty and short-term risks.

For those living paycheck to paycheck or surviving on fixed incomes, the risk of homelessness, financial insecurity, mental illness, hunger, or tough budgeting choices is real. The Federal Reserve recently found that nearly half of adults in the U.S. are not prepared for unplanned expenses. Nearly 46% of U.S. adults say they could not cover a \$400 emergency expense without borrowing, using credit, or selling something.^x

This means that many of our residents face near daily risks that could put them in debt or force hard choices. For example, some single parents may face the difficult budgeting choice between making a monthly car payment and sending their child to an early learning center. Working families making less than a livable wage are often one missed rent check away from homelessness. Older adults living alone are most at risk of not receiving adequate health care and are disproportionately impacted during natural disasters or extreme weather. Recovering addicts chance relapse with gaps in treatment programs and coverage. Youth in foster care or in unstable home situations risk missing opportunities to succeed without early learning, educational programs, or youth support networks.

Below are some of the critical data points that illustrate the risks and threats facing our region's residents and that inform the urgency of our next steps.

- **877** adults in Sarasota County were staying in homeless shelters or on the streets on a single day in January 2015.^{xi}
- **885** Sarasota County students are identified as homeless each school year.^{xii}
- **59,332** households in Sarasota County do not earn enough to meet basic household needs.^{xiii}
- **68%** of households in Sarasota County spend more than 50% of income on housing and transportation.^{xiv}
- **8,075** individuals in Sarasota County over the age of 65 are living in poverty.^{xv}
- **2,427** military veterans in Sarasota County are living in poverty.^{xvi}
- **19%** of Sarasota County residents report being diagnosed with a depressive disorder. For adults with incomes of less than \$25,000 a year, 33% report being diagnosed with a depressive disorder.^{xvii}
- **21%** of individuals in Sarasota County under 65 and 12% of children under 18 lack health insurance.^{xviii}
- **52%** of African-American workers and 32% of Hispanic workers in Sarasota County earn less than \$30,000 a year.^{xix}
- **11,708** households in Sarasota County received food stamp assistance in 2015, up from 4,778 in 2005.^{xx}
- **20,768** students at Sarasota County public schools receive free or reduced-price lunch, approximately 50% of the district's total enrollment.^{xxi}

WHERE DO WE ENGAGE? – OUR REGIONAL PRIORITIES

This regional scan identifies strategic priorities and areas of opportunity to help the Gulf Coast region move forward together. Priorities were identified through discussions with regional leaders and represent significant and commonly recurring themes. We asked leaders to prioritize issues and challenges, and then grouped responses within these regional priority areas. These priorities will shape Gulf Coast's initiatives, leverage our grants, and guide our next steps.

Creating Opportunity for All – We must enable and expand access to opportunity for current residents and the next generation. This means working together to mitigate the financial realities and risks of those living on the edge—by creating jobs that pay livable wages, by finding solutions to affordable housing, by creating educational pathways for our youth, and by expanding financial literacy for residents in our region.

Taking Care of Our Own – We must not overlook the less visible and the more vulnerable in our communities. Substance abuse has gripped our region, and our health and criminal justice systems are struggling under this epidemic. Chronic adult homelessness, subsistence living, and mental health-care access remain high-visibility and high-impact issues for many in our region.

Building the Innovation Economy – We must continue to be future ready and build the education, workforce, and entrepreneurial networks needed to diversify our economy. Nurturing innovation, expanding knowledge, and supporting creativity starts in our schools. From there, expanding business support networks, access to capital, real-time workforce training, and focusing on regional innovation clusters provide opportunities for our region's youth and entrepreneurs to stay and grow in our region.

Enhancing Our Unique Places – We must preserve and improve the greatest competitive strengths of our region—our unique communities, natural assets, amenities, and lifestyles. Our growing population, continuing development pressures, shifting mobility demands, and emerging extreme weather risks present significant long-term challenges to the quality of life in our region.

Advancing Civility – We must push back against trending extremism and embrace the differences that make our region great. Together we can encourage the next generation of elected leaders and private citizens, raise the level and tenor of public dialogue, celebrate our increasing diversity, and provide more opportunities for more people to become engaged and to volunteer in our region.

Our region faces immediate challenges. Gulf Coast staff will tactically engage and move forward with critical actions to address these pressing issues. Current initiatives are profiled in more detail in the following sections. We look to our regional leaders, our donors, and our nonprofit partners for ideas on how, together, we may move our region forward.

Together, we can shape a future with less divisive institutional issues, less fragmentation and duplication of services, less risk and uncertainty, and less suffering in our communities.

Describing Regional Priorities

Key Issues – This section provides an overview of critical issues identified by regional leaders within each regional priority area. For each issue, the impact on our region and available data highlighting needs is summarized. We recognize that there are many important issues not called out here that do affect our region and that are being addressed by partners. This regional scan helps Gulf Coast prioritize where to engage.

Key Indicators – This section highlights select data from the Gulf Coast Community Indicators website. These indicators provide a quick look at how we are doing on major issues within regional priority areas. More information is available online at GulfCoastIndicators.org.

Key Opportunities – This section describes Gulf Coast's current initiatives and what we are doing to move forward on regional priorities. Gulf Coast will align our initiatives and our grants and continue to develop partnerships and programs in our region that demonstrate progress on key issues.

CREATING OPPORTUNITY FOR ALL

To eliminate hardships in our region, we can continue to expand access to opportunity for all residents. This means working together to mitigate the financial realities and risks of those living on the edge—by creating jobs that pay livable wages, by finding solutions to affordable housing, by creating education and career pathways for our youth, and by expanding financial literacy and establishing safety nets.

KEY ISSUES – WHERE DO WE STAND?

Affordable housing – The rising cost of housing and lack of affordable rental options in the region impacts the Gulf Coast's economy, competitiveness, and quality of life and puts families at risk of not achieving financial independence. More than 76,000 households in Sarasota County pay 30% or more of their monthly income for housing, and more than half of those pay over 50%.^{xxii} This level of burden is unsustainable for many. A lack of affordable housing options means longer commutes, more traffic, less family time, and fewer residents living and working in their communities. Retaining skilled college graduates and attracting young professionals in critical occupations is increasingly difficult for businesses.

Inequality – Sarasota has a more unequal income distribution than Mexico and many other nations.^{xxiii} Between 2009 and 2015, average incomes declined for the bottom 20% of households after adjusting for inflation.^{xxiv} Wage growth has remained suppressed for the past decade, particularly for lower-skill and lower-income workers. A service economy, lack of minimum-wage increases, and the rapidly rising cost of housing, childcare, transportation, and other essential expenses continue to impact families in the region. Older adults are also often living in poverty and largely overlooked. In Sarasota, there are as many households over the age of 65 with incomes less than \$10,000 as there are older households with income greater than \$200,000.

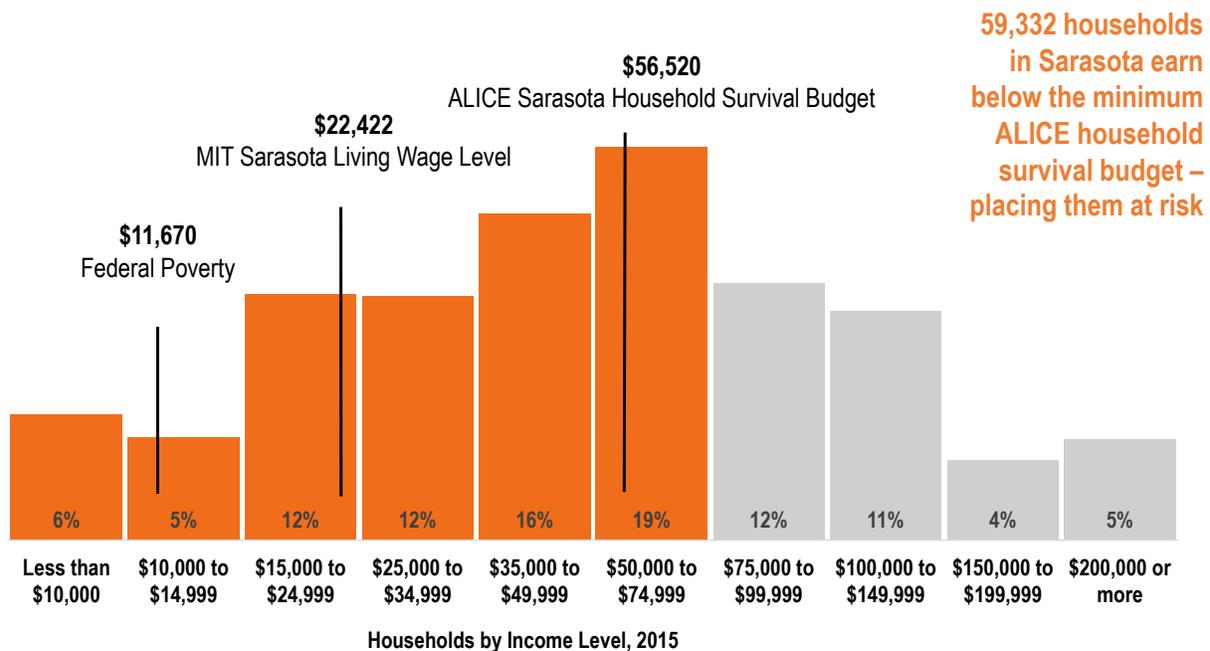
Unaccompanied youth – The next generation is our region's most critical asset. Yet, we often overlook the needs of homeless youth and those in the foster-care system, and we do not invest in early learning and quality childcare. Teen drug use and suicide are on the rise in Sarasota, and educational outcomes

for at-risk students and minorities are unchanged or declining. More than 19% of children under the age of 18 live in poverty in Sarasota, while counties of similar wealth and resource across the country have rates in the single digits.^{xxv}

Financial independence – Households that are unbanked or underbanked tend to have no checking or savings accounts, utilize high-interest payday loans, and are not able to establish credit histories. In the City of Sarasota, 7% of households are considered unbanked, compared with just 3% of households in the North Port-Bradenton-Sarasota metro area.^{xxvi} These households are at risk of never achieving financial sustainability or establishing the savings necessary to offset unexpected expenses. Community banking initiatives and financial literacy programs are critical to supporting financial independence.

SPOTLIGHT ON: THE WORKING POOR

For many families, even multiple jobs do not pay enough to meet basic household needs. With escalating childcare, housing, and transportation costs, most households must earn more than \$56,000 to support a family of four. These households are increasingly at risk of falling behind, rather than getting ahead. The United Ways of Florida publishes critical data on Florida’s working families. ALICE is a United Way acronym for Asset Limited, Income Constrained, Employed. “Employed” is the critical word. ALICE represents those who work hard and are above the poverty line but, due to high costs and factors often beyond their control, must live paycheck to paycheck.



KEY INDICATORS – HOW ARE WE DOING?

For more indicators, information, and insights on the Gulf Coast region, visit GulfCoastIndicators.org. Arrows indicate whether a key indicator is increasing, decreasing, or remaining stable.

Housing Affordability



This ratio of median home value divided by the median household income, adjusted for inflation, provides a rough estimate of the affordability of homes in a community. A ratio less than 2 or 3 is considered affordable.

The Gulf Coast had a housing affordability ratio for homeowners of 3.0 in 2011-15, slightly higher than the statewide ratio of 2.8 and the national ratio of 2.6. This was a 33% increase from the 2000 ratio of 2.3. Among the four counties of the Gulf Coast, homes were least affordable in Sarasota, which had a ratio of 3.1 in 2011-15.

Homelessness



The extent of homelessness can be an indicator of a community's ability to provide stable jobs that pay a living wage, adequate support for the unemployed, affordable housing, and accessible mental and health care. The Gulf Coast region had 22 homeless people per 10,000 residents in 2015, slightly higher than statewide and national rates. From 2008 through 2014, the average regional rate was 23, compared with the state rate of 27 over the same period.

Working Poor



People who are working but earning at or below poverty face numerous obstacles that make it more difficult for them to improve their status. They may find it hard to meet basic needs as well as pay for services they require to stay employed, such as transportation or childcare. Among employed individuals on the Gulf Coast, 3.4% had incomes in 2011-15 that fell below the poverty line, lower than the proportions for the state and the nation (4.3% and 4.4%, respectively). Some cities within the region had higher rates of working poor, such as Sarasota at 5.7%.

KEY OPPORTUNITIES – WHAT ARE WE DOING?

Evolving Initiatives

- **Financial Sustainability** – Gulf Coast Community Foundation is collaborating with United Way Suncoast and other partners to provide a regional Financial Sustainability Initiative. Rather than only teach financial-literacy basics, like how to balance a checkbook or create a budget, the program helps families understand things like predatory loans with high interest rates are a bad alternative to pay for car repairs, or that saving for college begins when children are young.
- **Predatory Lending Alternatives** – Gulf Coast and the Capital Good Fund are partnering to provide clients in the Financial Sustainability Initiative with affordable loans that take the place of payday loans, buy-here-pay-here car financing, and rent-to-own pricing. Capital Good Fund is a nonprofit, certified community development financial institution that helps people fix their finances.
- **Reading Recovery** – Gulf Coast is supporting the Reading Recovery program in Sarasota County Schools and considering ways to scale it to reach even more students. This program is a highly effective, short-term, early intervention for first-grade students who have the most difficulty with reading and writing.

Continuing Initiatives

- **Talent4Tomorrow** – Gulf Coast is a funder and partner in Talent4Tomorrow, a diverse collaboration of business, education, and philanthropic organizations working to increase college and career preparation, access, and completion for Sarasota County youth.
- **21st Century Learning** – Gulf Coast and Sarasota County Schools previously converted every middle-school math and science classroom in the district to TechActive classrooms through our STEMsmart initiative. In partnership with the Charles and Margery Barancik Foundation, we are now extending the same interactive technology, instructional techniques, and teacher training to language arts and social studies middle-school classrooms across the county.
- **C4** – Gulf Coast Community Foundation supports the Consortium of Colleges on the Creative Coast (C4). This higher education collaborative broadens educational experiences through unique but complementary programs, services, and philosophies and connects students across the region. C4 includes New College of Florida, Ringling College of Art and Design, State College of Florida Manatee-Sarasota, University of South Florida Sarasota-Manatee, Florida State University/The Ringling, and Eckerd College.

TAKING CARE OF OUR OWN

For all the opportunity that our region affords, there are many residents at risk and vulnerable in our communities. Chronic homelessness, substance abuse, overdose and suicide deaths, subsistence living, and mental health-care access remain high-visibility and high-impact issues for many in our region.

KEY ISSUES – WHERE DO WE STAND?

Substance abuse and criminal justice – Manatee and Sarasota counties are among the top counties in Florida in terms of incidences of opioid abuse and fatal overdoses. In January 2017 alone, Sarasota County experienced 21 reported overdoses, which was four times the total reported cases in January of 2016. The opioid epidemic takes a toll on parents and children of all ages, races, and incomes. Sarasota must continue to experiment with innovative approaches to treatment, rehabilitation, law enforcement, and criminal justice to stem this rising wave.

Chronic homelessness – There are anywhere from 870 to 1,700 homeless individuals in Sarasota County at any given time.^{xxvii} Some of these individuals are visible on street corners, but the vast majority are families, single parents, and students who remain largely invisible. The Sarasota community has made significant strides in providing solutions for homeless children and families. However, a coordinated and cooperative approach to addressing chronic adult homelessness and unaccompanied youth is needed. Chronic homelessness refers to those who continue to struggle to find footing or jobs and are often impacted by a disability or mental health need. These individuals tend to fall through the cracks in social support systems or need primary care before they are able to support themselves.

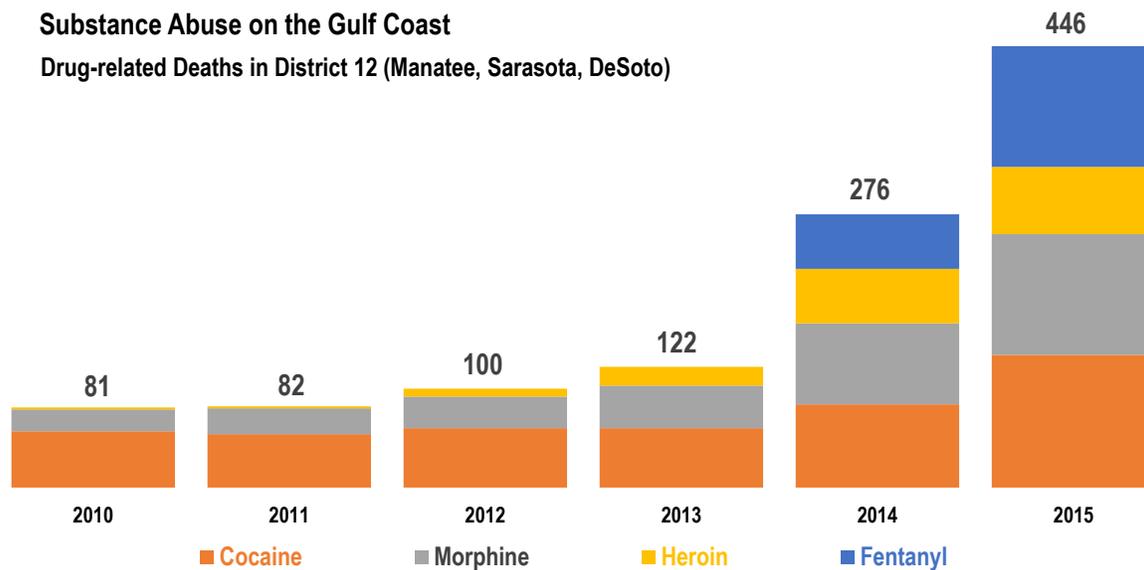
Mental health – Nearly 16 percent of Sarasota residents report being diagnosed with a depressive disorder, and regional suicide rates have jumped in recent years.^{xxviii} For those who can afford it, quality care is available. However, for at-risk, youth, and underserved populations, barriers to care include cost, availability, transportation, and stigma. Mental-health issues can severely impact employment opportunities, lead to domestic violence and suicide, and contribute to unstable family situations. Assessing current gaps and barriers to quality mental health care is critical to alleviating these risks.

Childcare – Early learning and childcare centers provide essential education for children and support for working parents. Ensuring access to care and improving the quality of that care in our region is critical. Nationally and regionally, sustained investments are not made in the early learning system as they are in K–12 or higher education. Childcare for a family with one infant and a preschooler is estimated at \$1,100 per month in Sarasota County—out of reach for many working poor families.^{xxix} Public support is critical to bringing down costs and improving the affordability and quality of care our children receive.

SPOTLIGHT ON: OPIOID ABUSE IN THE GULF COAST REGION

Opioids are a class of drugs that include the illicit drug heroin as well as the licit prescription pain relievers oxycodone, hydrocodone, codeine, morphine, fentanyl, and others. Four in five new heroin users started out misusing prescription painkillers.^{xxx} Most overdose cases are in persons under the age of 35. Individuals of all incomes, classes, races, and ethnicities are impacted.

Substance Abuse on the Gulf Coast
Drug-related Deaths in District 12 (Manatee, Sarasota, DeSoto)



KEY INDICATORS – HOW ARE WE DOING?

For more indicators, information, and insights on the Gulf Coast region, visit GulfCoastIndicators.org. Arrows indicate whether a key indicator is increasing, decreasing, or remaining stable.

Early Prenatal Care



Early, high-quality prenatal care is critical to reducing risks for complications of pregnancy or birth and improving birth outcomes. In 2015, 74% of new mothers in the Gulf Coast region reported receiving early prenatal care, lower than the statewide rate of 79%. Among our four regional counties in 2015, Sarasota had the highest rate of women receiving early prenatal care, at 77%, while DeSoto had the lowest, at 67%.

Teen Drug Use



Drug use has serious long-term physical and mental effects on young people. It can be particularly damaging to the social and psychological development of a young person's brain. Among Gulf Coast middle and high school students, 19% reported using illicit drugs of any kind in the past 30 days in 2014, compared with 16% of students statewide. From 2002 to 2014, students here reported a slightly higher rate of use than in the state as a whole.

People Without Health Insurance



Health insurance is critical to family and individual access to care, financial security, and peace of mind. In 2014, 21% of individuals under 65 in the Gulf Coast region were uninsured, similar to the statewide rate of 20% and substantially above the national rate of 14%. Regional, statewide, and national uninsured rates remained fairly stable from 2008 but began to fall in 2014.

KEY OPPORTUNITIES – WHAT ARE WE DOING?

New Initiatives

- **Adult Homelessness** – Gulf Coast Community Foundation partnered with seven key agencies and more than 30 other service providers to implement a strategic and coordinated response to child and family homelessness. Now we are turning our attention to a collaborative approach to adult homelessness.
- **Unaccompanied Youth** – Gulf Coast is considering a comprehensive approach to effectively address transitional youth homelessness. The proposed service system offers communities a roadmap to a spectrum of service and programmatic models to support unaccompanied homeless youth. Social, health, and educational supportive services must be linked with housing assistance to achieve positive outcomes.
- **Drug Addiction** – Gulf Coast and other partner agencies are proposing to develop and implement a comprehensive initiative that focuses on reducing the number of repeat overdoses and substance abuse behaviors of individuals brought to hospital emergency departments. This initiative will identify barriers to ongoing treatment, better support service engagement, and provide clients with effective recovery plans.

Continuing Initiatives

- **Kids SWIM** – Gulf Coast Community Foundation offers free water-safety lessons to second-graders in Sarasota County and Charlotte County public schools through the Kids SWIM initiative. With Florida having the second-highest drowning rate in the country for children age 1 to 14, this initiative has helped thousands of students gain or improve critical water-safety skills.

BUILDING THE INNOVATION ECONOMY

To be future ready, the Gulf Coast must continue to build the education, workforce, and entrepreneurial networks needed to diversify our economy. Nurturing innovation, expanding knowledge, and supporting creativity starts in our schools. From there, expanding business support networks, access to capital, real-time workforce training, and focusing on regional innovation clusters provide opportunities for our region's youth and entrepreneurs to stay and grow in our region.

KEY ISSUES – WHERE DO WE STAND?

Pre-K–12 excellence – Sarasota County schools outperform peer districts in the state and across the country, but our region still has room to improve educational outcomes for all students—particularly low-income and minorities. Six in 10 children are enrolled in early learning programs; seven in 10 eighth-grade students perform adequately in math; nearly eight in 10 high school students graduate on time; and just six in 10 of those graduates continue to college.^{xxxi}

Future workforce – More than two-thirds of the fastest-growing occupations in Sarasota between now and 2025 require at least an associate degree or vocational program, and one in five new jobs requires an advanced degree.^{xxxii} To meet current job openings and to continue to diversify the regional economy into new knowledge and innovation clusters requires providing businesses with a skilled labor pool and providing workers with industry-recognized skills training and quality workforce education.

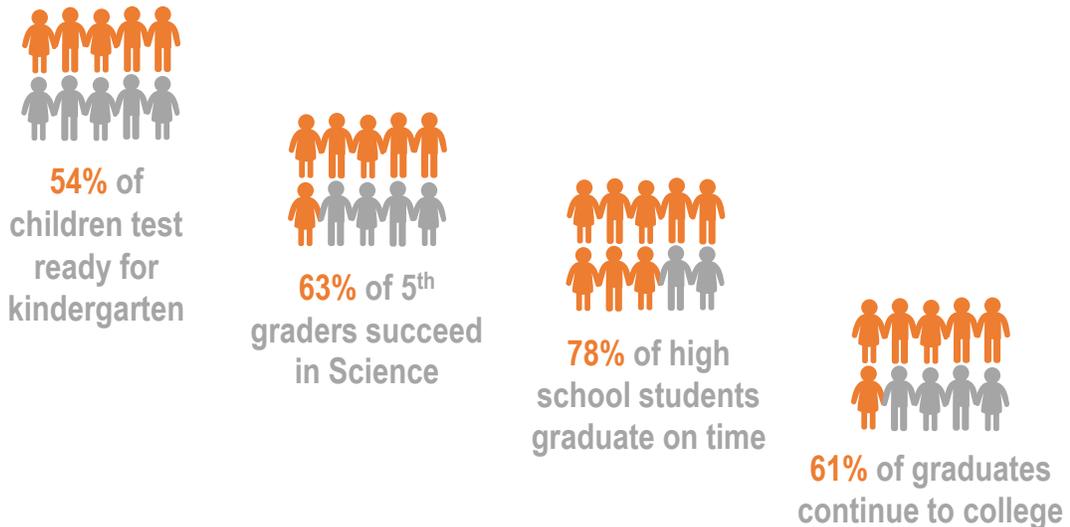
Economic diversification – Average annual wages in Sarasota County's top five industries fall below the United Way's ALICE household survival budget, and many jobs pay average salaries near the poverty level.^{xxxiii} The industries account for nearly 60% of job opportunities in the region. To reduce risks of future economic downturns, the Gulf Coast must develop a more diversified and resilient economic base. This means growing creative, production, and knowledge-based industry sectors that provide high benefits and high wages to residents.

Retaining youth – A perennial issue in the region continues to be the need to retain and attract youth and skilled young workers. The average new resident relocating to Sarasota County in the past year is 47, with a gross income of \$110,000 and at least some college education.^{xxxiv} It is difficult to track the out-migration of Sarasota's youth and younger professionals. Anecdotally, many high school and college graduates move away from the region in pursuit of job opportunities, affordable housing, different lifestyles, and urban environments. Attracting prime-age working professionals is critical to support a resilient economic base and diverse community.

SPOTLIGHT ON: STUDENT ACHIEVEMENT

The Sarasota County School District has initiatives in place to close achievement gaps. But regional leaders believe that more could be done to help students succeed—by identifying which student groups and communities struggle the most and by implementing the recommendations of recent studies.

Sarasota's Educational Pipeline



KEY INDICATORS – HOW ARE WE DOING?

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STEM Degrees



Many good-paying jobs in need of qualified workers are in STEM fields. STEM fields are some of the fastest-growing occupations in the nation. In 2015, 17% of Gulf Coast adults held a STEM degree, close to the statewide figure of 19% but less than the national percentage of 22%. Among counties, 18% of Sarasota adults, 17% of Manatee adults, and 16% of Charlotte adults had a STEM degree.

Change in Average Salary



Salaries are a gauge of economic health and a measure of how workers are sharing in the prosperity of our region. Average salaries also indicate the vitality of a region and our ability to compete and attract workers. From 2000 to 2015, the average salary across the Gulf Coast region rose by 10%, greater than the state (9.6%) and nation (8.9%). However, for many workers, earnings and wages have not kept pace with inflation.

Early Learning



Early emphasis on reading and social skills prepares children to succeed later in their education. In 2015, 67% of Gulf Coast 4-year-olds were enrolled in voluntary pre-kindergarten programs, slightly greater than 64% statewide. This figure dropped by 9 points from 2014, but is still higher than the regional rate of 35% in 2006.

KEY OPPORTUNITIES – WHAT ARE WE DOING?

Evolving Initiative

- **Bright Ideas on the Gulf Coast (BIG)** – Gulf Coast Community Foundation and the Gulf Coast CEO Forum continue to support the BIG initiative to provide entrepreneurial support, talent connections, and mentorship resources to new and growing businesses in the region. Through BIG, Gulf Coast works on a number of projects aimed at diversifying our regional economy, including the UF Innovation Station and promoting and developing four strategic growth sectors.

Continuing Initiative

- **CareerEdge** – Gulf Coast continues to support the CareerEdge Funders Collaborative, an award-winning workforce and business innovation initiative that helps area employers meet the challenges of a rapidly changing economy. CareerEdge works with employers in fast-growing sectors to fill skills gaps and meet their labor needs, while it also assists individuals in entering the workforce and moving up career ladders.

ENHANCING OUR UNIQUE PLACES

The greatest competitive strengths of our region are our unique communities, natural assets, amenities, and lifestyles. A growing population, continuing development pressures, shifting mobility demands, and emerging extreme weather risks present significant long-term challenges to the quality of life in our region. The burdens and costs of transportation, development patterns, and housing represent growing threats to Sarasota County's working families, tourists, residents, and future generations.

KEY ISSUES – WHERE DO WE STAND?

Placemaking – Regional issues such as transportation, water, natural resources, and growth and development require regional solutions. However, there is little consensus on how the Gulf Coast should grow in the future, and many communities are currently debating different approaches to development. With the region's growing population and overcapacity or aging infrastructure, the costs to accommodate future growth are significant. Long-term regional visioning efforts may be needed to establish leadership and consensus around preferred future growth patterns.

Transportation – For the first time in Sarasota County's annual citizen survey, traffic congestion topped residents' worries about threats to the regional economy. Increasing traffic costs commuters \$592 million in the Sarasota-Bradenton area, and estimates and regional transportation agencies have identified nearly \$2.5 billion in needed transportation improvements over the next 25 years. Technology, alternative transportation, and supportive development can alleviate transportation needs, but they require regional cooperation. The mobility and transportation needs of older adults will continue to grow and are largely

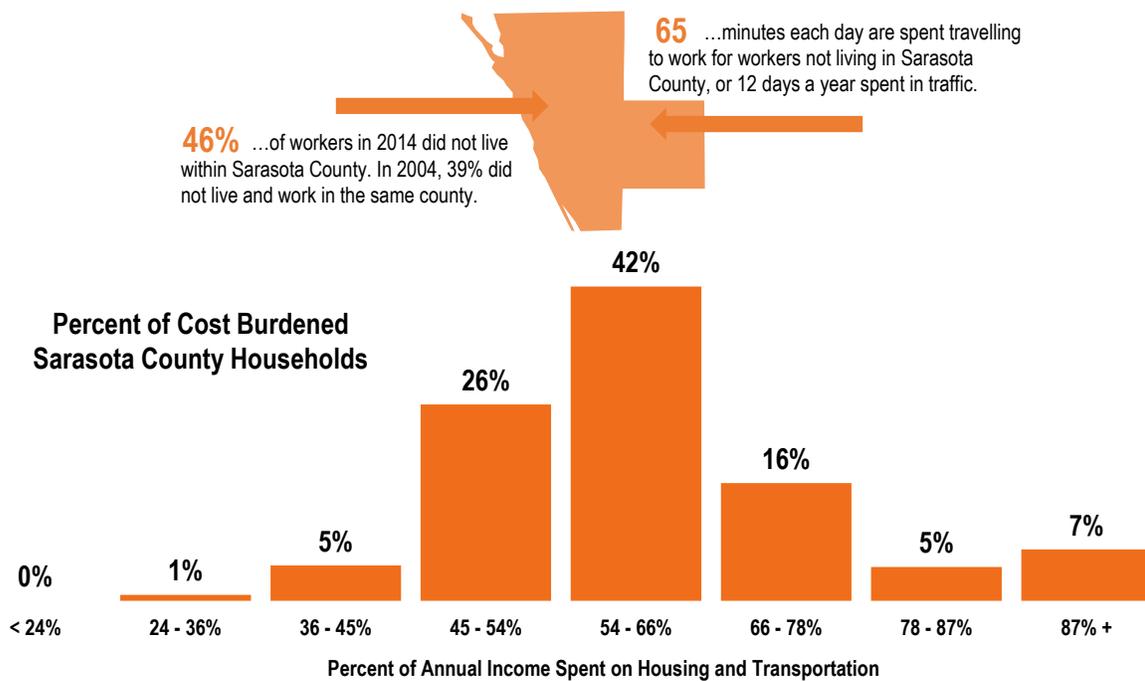
unaccounted and unplanned for in the region. These include alternative signage, increased safety measures, active transportation and transit options, and shared mobility.

Conservation and recreation – More than one-third of Sarasota County’s land area is dedicated for conservation. This success has largely been through public-private efforts and the voter-approved land acquisition program. However, challenges continue in funding ongoing management of these natural areas, increasing protection, mitigating against risk, and encouraging public access and use where appropriate. Our region’s natural areas also provide protection and access to invaluable historical and archaeological sites.

Climate change and extreme weather – Communities along the Gulf Coast have been witnessing beach erosion at an unprecedented rate. Beaches are a major economic driver, and the cost to address critically eroded beaches will run into the tens of millions for Gulf Coast counties. Extreme weather and storms are likely to worsen in the coming decades as the impacts of a changing climate are felt along the region. Sarasota County barrier islands, real estate, and critical infrastructure, including roads, water, and utilities within five miles of the shore, are considered at risk to climate impacts.^{xxxv}

SPOTLIGHT ON: THE COSTS OF COMMUTING

With rising housing costs in the region, more and more workers are commuting longer distances to jobs in the region. This hidden burden represents direct costs to working families in terms of spending on transportation and travel time away from families and children. On average, housing and transportation costs can consume 60 percent of a household’s income in Sarasota County. Of workers earning \$50,000 or less, 84% travel to work in their own vehicle. Transportation costs for workers average \$11,700 annually, or more than 20% of income, leaving little else for food, childcare, education, and other household essentials.^{xxxvi}



KEY ISSUES – WHERE DO WE STAND?

For more indicators, information, and insights on the Gulf Coast region, visit GulfCoastIndicators.org. Arrows indicate whether a key indicator is increasing, decreasing, or remaining stable.

Conservation Lands



The Gulf Coast has tremendous biodiversity and natural resources. A careful balance between development and conservation is needed to protect threatened species and enable residents and visitors to explore our natural areas. In 2015, 395,000 acres of land on the Gulf Coast were dedicated to conservation or recreation, or 24% of the region. The state of Florida currently has 30% of total land set aside. Sarasota County has conserved a slightly higher proportion than the state, setting aside 31% of land area.

Commute Times



Commute time is an indicator of the availability of desirable and attainable housing near work areas, as well as a measure of worker mobility and potential impacts of congestion. The average commute time on the Gulf Coast was 24 minutes in 2011-15, slightly shorter than statewide and national commutes. Several local municipalities in the region had more extreme commute times, with residents of the City of Sarasota commuting 20 minutes to work on the low end and residents of North Port commuting 29 minutes on the high end.

Population Growth



Population measures provide insight on the changing size and face of our region's communities. From 2000 through 2015, the population of the Gulf Coast region increased 28%, similar to the rate of growth experienced by Florida and double the national rate of 14%. Sarasota County's population grew 24% over that period. Cities in the region that increased the most from 2000 through 2015 were Venice (20%), Punta Gorda (24%), and North Port (173%).

KEY OPPORTUNITIES – WHAT ARE WE DOING?

Evolving Initiatives

- **Manasota Beach Offshore** – Recent investigation of a globally significant, historically unique underwater archaeological site near Manasota Key has raised urgent questions, from how to best protect and learn from this site to whether there could be similar undiscovered prehistoric resources along our coast. Gulf Coast Community Foundation is working with the State of Florida and regional and local agencies to ensure that further documentation of such discoveries maximizes the potential to protect, preserve, and interpret these rare historic resources in a sustainable and culturally sensitive way.
- **Sarasota Bayfront Planning** – Gulf Coast is a partner in the community initiative Sarasota Bayfront 20:20, launched in 2013 to create a common vision for the future of Sarasota's bayfront. More than 55 arts, neighborhood, foundation, and business groups have endorsed a vision statement and roadmap for future redevelopment of the area. Now, a volunteer board, the Sarasota Bayfront Planning Organization, is overseeing a master-planning process.

ADVANCING CIVILITY

Together we can encourage the next generation of elected leaders and private citizens, raise the level and tenor of public dialogue, celebrate our increasing diversity, and provide more opportunities for more people to become engaged and to volunteer in our region.

KEY INDICATORS – HOW ARE WE DOING?

Public and private leadership – A common perception among regional leaders is a lack of consistent and unified leadership from elected officials and public managers in our region. Differences in approaches, policies, and philosophies among cities and between the cities and the county may reduce the effectiveness of interventions and initiatives. Drawing new voices into decision processes and developing new leaders, particularly from younger generations and the business community, is critical to ensuring that we work together for the good of our region.

Civil dialogue – Interest in the presidential election drove voter turnout to record levels. More than 77% of registered voters cast a ballot in 2016.^{xxxvii} With the rise of social media, the tone and tenor of public discourse has changed. Sarasota likely mirrors national trends in the decline of exposure to differing viewpoints, news sources, and conversations in public forums.

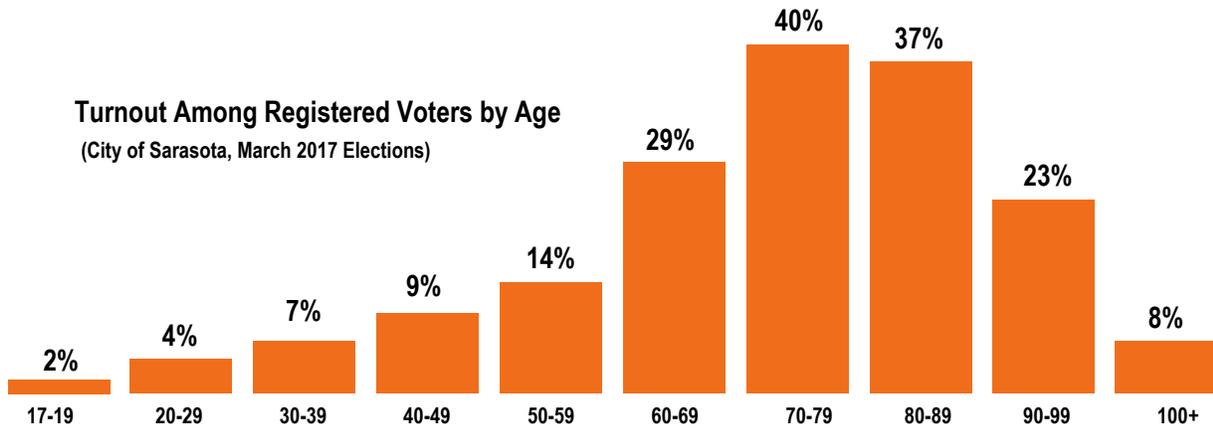
Civic capacity – Public confidence in Sarasota County officials is at an all-time high. Sixty percent of residents surveyed in 2016 expressed confidence in local government to do the right thing ‘almost always’ or ‘most of the time,’ compared with 46 percent in 2011.^{xxxviii} However, nearly 30% of Sarasota County government’s workforce will be eligible to retire by 2020.^{xxxix} Recruiting, retaining, and cultivating skilled and committed public-sector workers is increasingly challenging for local governments.

Celebrating diversity – Sarasota depends on in-migration to attract new residents and workers. While most new residents move from other parts of Florida, a significant number come from other nations. By 2030, nearly 1 in 5 residents will be of non-white, non-Hispanic race or ethnicity, up 5 percent from today.^{xl} Over 16 different languages other than English are primarily spoken in the homes of Sarasota residents.^{xli} Recognizing and celebrating this diversity and Sarasota’s global connections will be increasingly important.

Engagement and volunteerism – While 25% of Sarasota residents report volunteering time and energy to community service, this is nearly half the rate of the top mid-sized cities in the country.^{xlii} Volunteerism is an indicator of how well residents are connected and invested in our region and how well our institutions and organizations are communicating needs and interacting with supporters. We can provide more opportunities for service by working with partner organizations, developing pooled service tools, and encouraging residents to invest their time and energies in making our region better.

SPOTLIGHT ON: GULF COAST CIVIC ENGAGEMENT

Sarasota County is home to many actively involved residents who contribute substantially, in time and money, to support nonprofit organizations. However, that active and engaged population represents just 1 in 4 residents. Our region ranks poorly compared with other medium-sized cities in terms of engagement and volunteerism. In recent City of Sarasota elections, voter turnout among residents 90 years and over was greater than turnout among residents 30 and younger.^{xliii} Engaging the next generation in civic life, political discourse and leadership, and our region’s social fabric is critical to the success of our region.



KEY INDICATORS – HOW ARE WE DOING?

For more indicators, information, and insights on the Gulf Coast region, visit GulfCoastIndicators.org. Arrows indicate whether a key indicator is increasing, decreasing, or remaining stable.

Community Service



Volunteerism is an indicator of how connected people feel to organizations and institutions in their area. In 2013-2015, 25.7% of residents in the North Port-Bradenton-Sarasota metro area engaged in a community service activity. This is higher than Florida’s rate of 19% and slightly higher than the national rate, but still ranks well below similar mid-size metro areas at 47th out of 75 across the U.S. The percentage of people engaging in community service in the region has increased from 2010-2012.

Voter Participation Rate



Voter participation is a gauge of interest in and engagement with the political process. The Gulf Coast region had a higher rate of voter participation in the 2012 presidential election (60%) than Florida (56%) and the United States (54%). The region and the state both experienced lower voter turnout in 2012 than in 2008 and 2004. Sarasota had the highest voter participation rate among the four counties in our region for both 2014 and 2012, with 48% of eligible individuals voting in the 2014 midterm and 64% voting in the presidential election.

Charitable Contributions



Charitable giving supports organizations that provide essential services to the community and people in need. Our level of giving shows residents’ willingness to invest in programs and organizations serving the community. Residents of the Gulf Coast region donated 2% of their income to charity in 2013, similar to statewide and national levels. Sarasota and Manatee had the highest rates, at 2.1% each, among regional counties. Sarasota County residents gave nearly \$280 million to charity in 2013 and made up half of all contributions in the region. Donations as a percentage of income fell from 2002 to 2013, mirroring statewide and national trends.

KEY OPPORTUNITIES – WHAT ARE WE DOING?

New Initiative

- *Because It Matters* – Gulf Coast Community Foundation launched its first civility initiative, *Because It Matters*, in 2007. The three-year campaign raised awareness of the importance of civil discourse, civic participation, community engagement, and social capital. Ten years later, amid trending extremism nationally and growing diversity within our region, Gulf Coast will relaunch *Because It Matters* in 2017. Utilizing technology that was not available a decade ago, the refreshed initiative will focus on promoting civility within our schools, workplaces, and broader community life.

Continuing Initiative

- *Better Together* – Gulf Coast invites thought leaders to our region to educate our communities on emerging issues and opportunities through our recurring *Better Together* series. Speakers and topics have included historian and author David McCullough on leadership and civility, entrepreneur Peter Diamandis on innovation, psychologist Daniel Goleman on the value of emotional intelligence, and political scientist Robert Putnam on the importance of social capital.

NEXT STEPS

In some ways, our region is less than the sum of its parts. With our people; our schools and colleges; our businesses; our civic, arts, and cultural institutions; our natural assets; and our unique places, our region could be a top destination for investment, innovation, and inspiration. However, while Sarasota County ranks highly for beaches, schools, and arts, we are not top-ranked in the nation, or even within Florida, for job creation, workforce, prosperity, or equality. Gulf Coast Community Foundation is working to change this dynamic together with our donors and partners.

This regional scan highlights priority areas in which we, as a region, must engage. Many of these priorities are recurring issues and represent enduring enigmas. We will continue to work on these long-term issues by spurring ideas and initiatives, leveraging grants and initiatives, and bringing proven programs and interventions to our region. The Gulf Coast Community Indicators website provides indicators to mark and gauge our progress in these critical areas.

We can't continue to move toward an innovation economy while leaving so many behind and so many families at risk. We can't continue to develop and attract the best talent and compete for high-quality, high-wage jobs when our region's quality of life is threatened by traffic, extreme weather, and development pressures. We can't continue to provide for our older and younger generations when housing is unaffordable and our region's cost of living and working burdens so many.

The economic cost of social issues and the amount of resources dedicated to helping others in our region is substantial. By investing in people and pursuing lasting solutions, we can help mitigate poverty, reduce hunger and homelessness, support financial-asset building, and provide future opportunities for many. Gulf Coast Community Foundation is dedicated to advancing bold ideas and proactive initiatives to move our region forward. With your help, we can start building a better future for the Gulf Coast.

ACKNOWLEDGMENTS

Gulf Coast extends our sincere appreciation and gratitude to those regional and community leaders who participated in this regional scan. With your insights, ideas, and inspiration, we will continue to move forward together.

NOTES

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 - ⁱⁱ University of Florida, Bureau of Economic and Business Research, 2016.
 - ⁱⁱⁱ University of Florida, Bureau of Economic and Business Research, 2016.
 - ^{iv} U.S. Census Bureau, American Community Survey, 2015.
 - ^v Yale Program on Climate Change Communication, 2016.
 - ^{vi} Sarasota County, Citizen Opinion Survey, 2016.
 - ^{vii} Sarasota Observer, "Aging Workforce," April 9, 2015.
 - ^{viii} U.S. Census Bureau, American Community Survey, 2015.
 - ^{ix} U.S. Commerce Department, Bureau of Labor Statistics, 2016.
 - ^x Federal Reserve System, Report on the Economic Well-Being of U.S. Households in 2015, May 2016
 - ^{xi} Florida Council on Homelessness, 2016.
 - ^{xii} Florida Council on Homelessness, 2016.
 - ^{xiii} United Ways of Florida, ALICE Report, 2017.
 - ^{xiv} Center for Neighborhood Technology's Housing and Transportation Affordability Index, 2015.
 - ^{xv} U.S. Census Bureau, American Community Survey, 2015.
 - ^{xvi} U.S. Census Bureau, American Community Survey, 2015.
 - ^{xvii} Florida Department of Health, Sarasota County, 2015.
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 - ^{xix} U.S. Census Bureau, American Community Survey, 2015.
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 - ^{xxxv} City of Sarasota, Climate Change Vulnerability Assessment and Adaptation Plan, 2016.
 - ^{xxxvi} Center for Neighborhood Technology, Housing and Transportation Affordability Index, 2015.
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 - ^{xxxviii} Sarasota County, Citizen Opinion Survey, 2016.
 - ^{xxxix} Sarasota Observer, "Aging Workforce," April 9, 2015.
 - ^{xl} University of Florida, Bureau of Economic and Business Research, 2016.
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 - ^{xlii} Corporation for National and Community Service, Volunteering in America.
 - ^{xliii} SRQ Media Group, "Where the Votes Are: Bullet Votes," March 16, 2017.