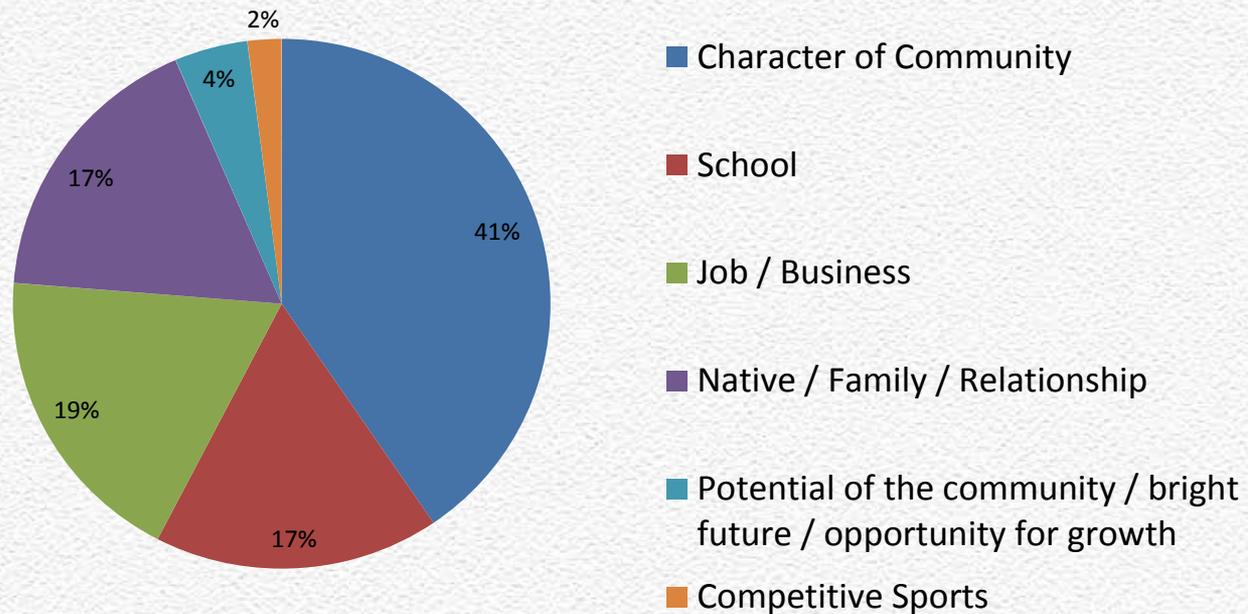
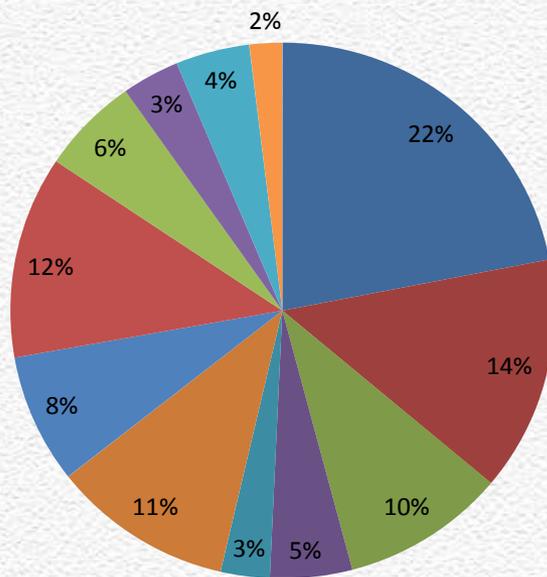


May 2013 Open House Input Summary

What brought us here/keeps us here?

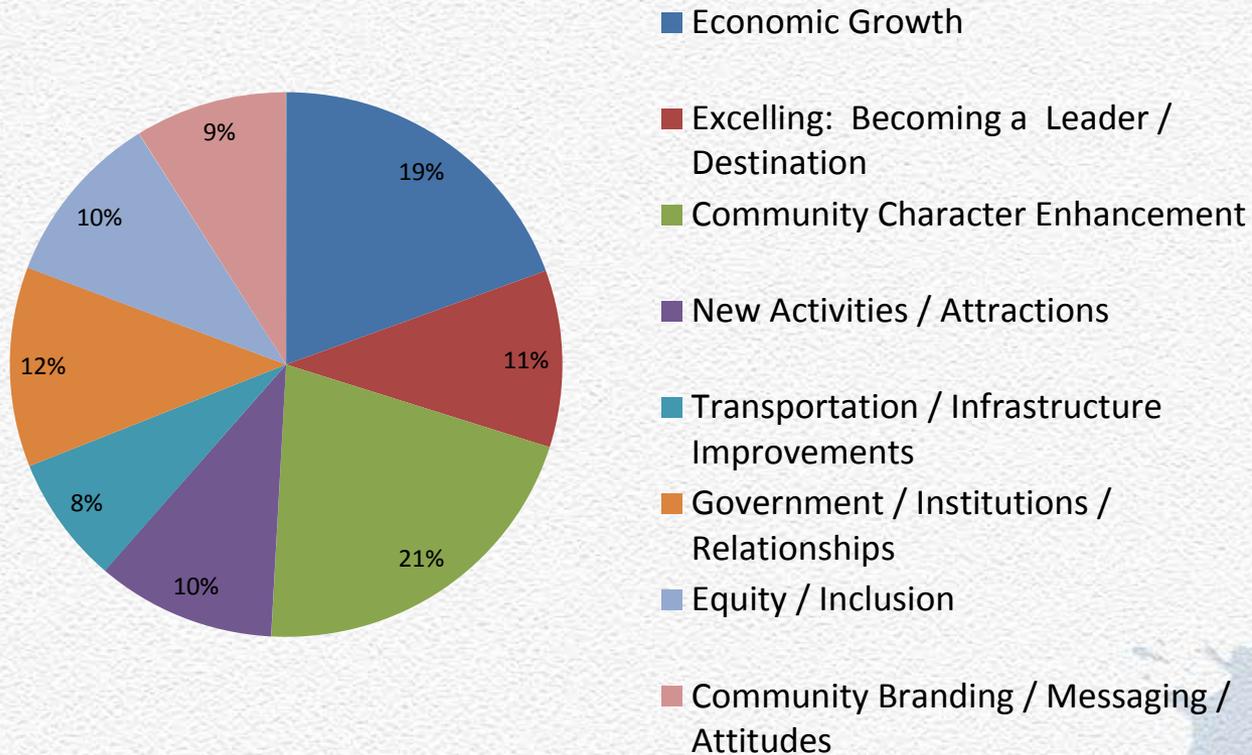


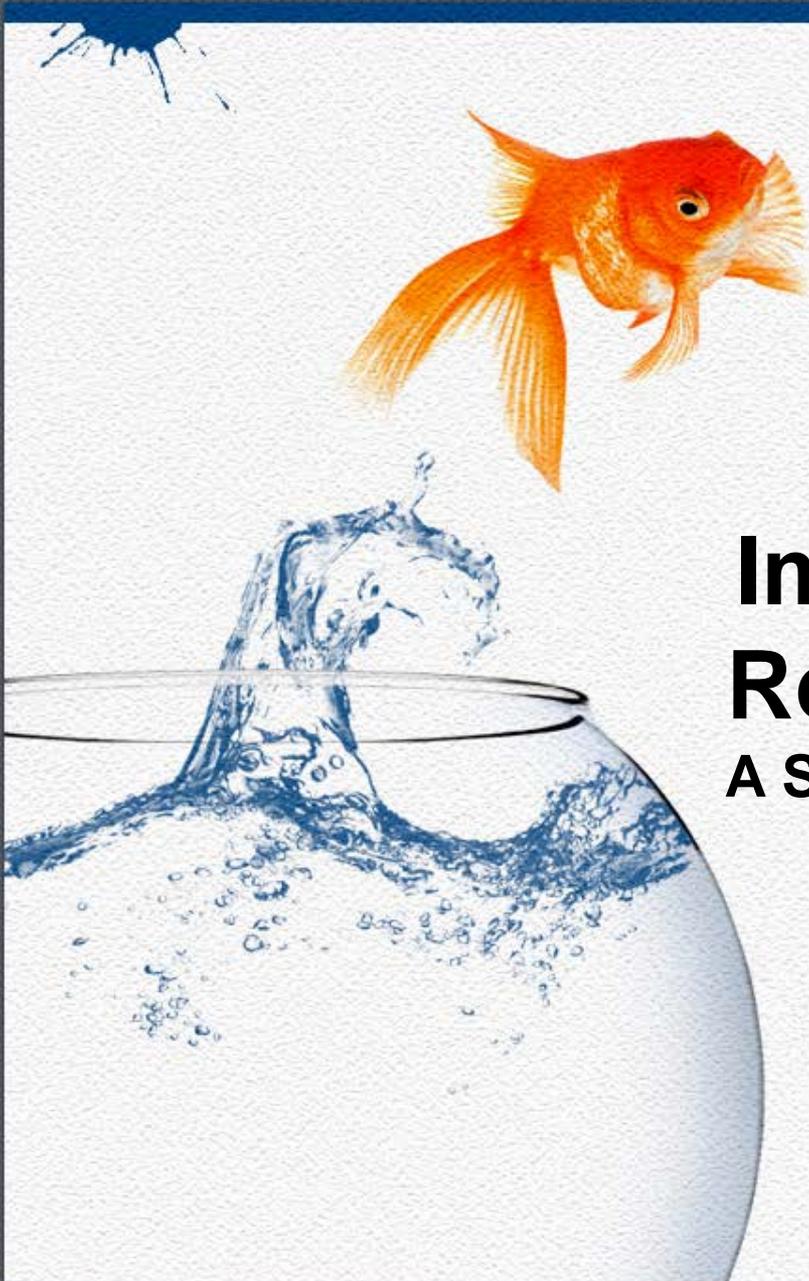
What are our most pressing concerns?



- Economy
- Government / Institutions / Relationships
- Community Character
- Poverty / Underemployment / Crime
- Public Health
- Equity / Inclusion
- Transportation / Infrastructure
- Public Attitudes
- Environmental Resources
- Housing
- Community Branding / Messaging
- Arts / Culture

What's Next? What should we strive to achieve in 20-30 years?

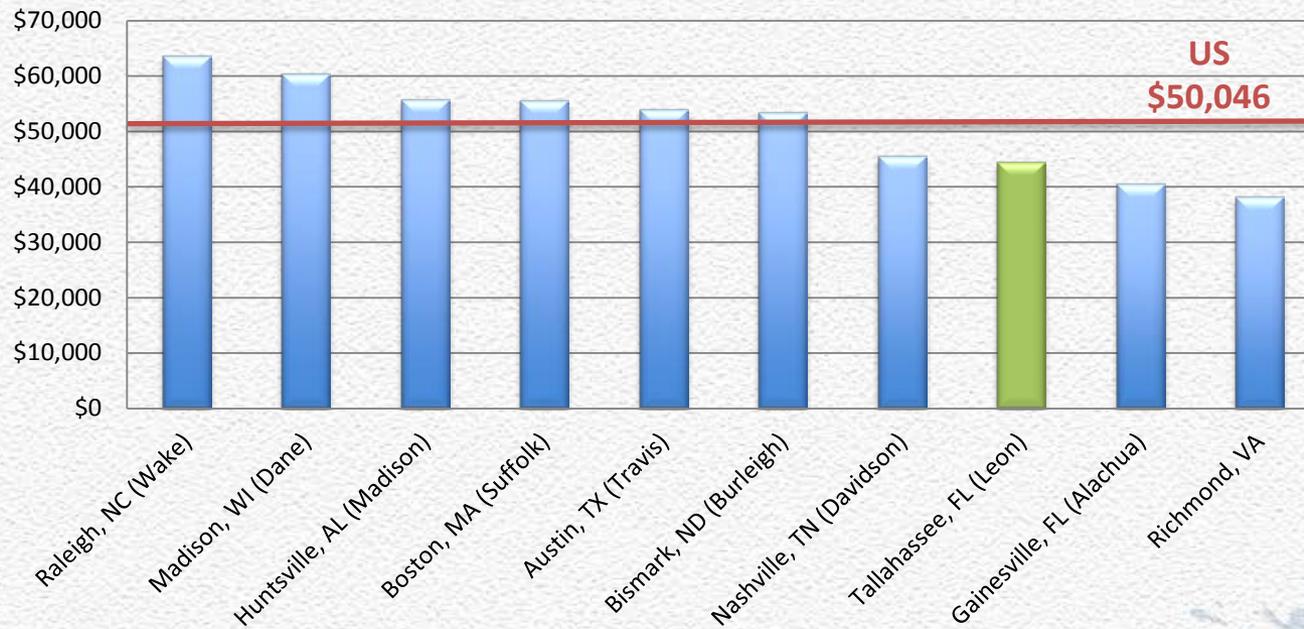




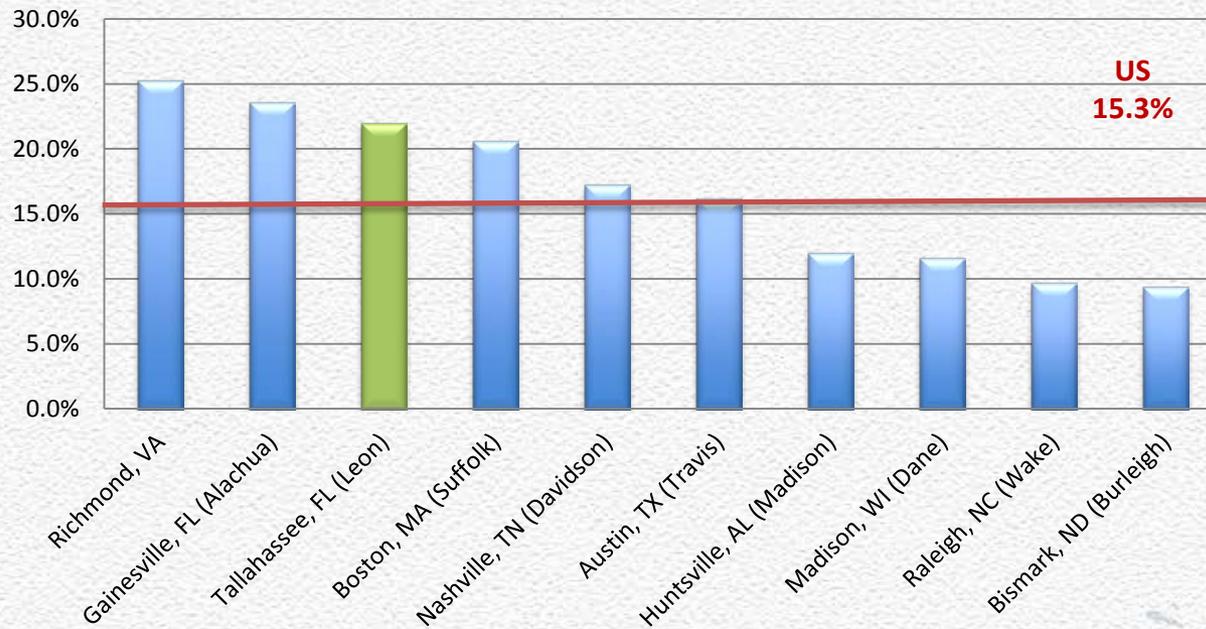
**Imagine Tallahassee
Report Card Preview
A Snapshot of Current Conditions**

Dale A. Brill, Ph.D.

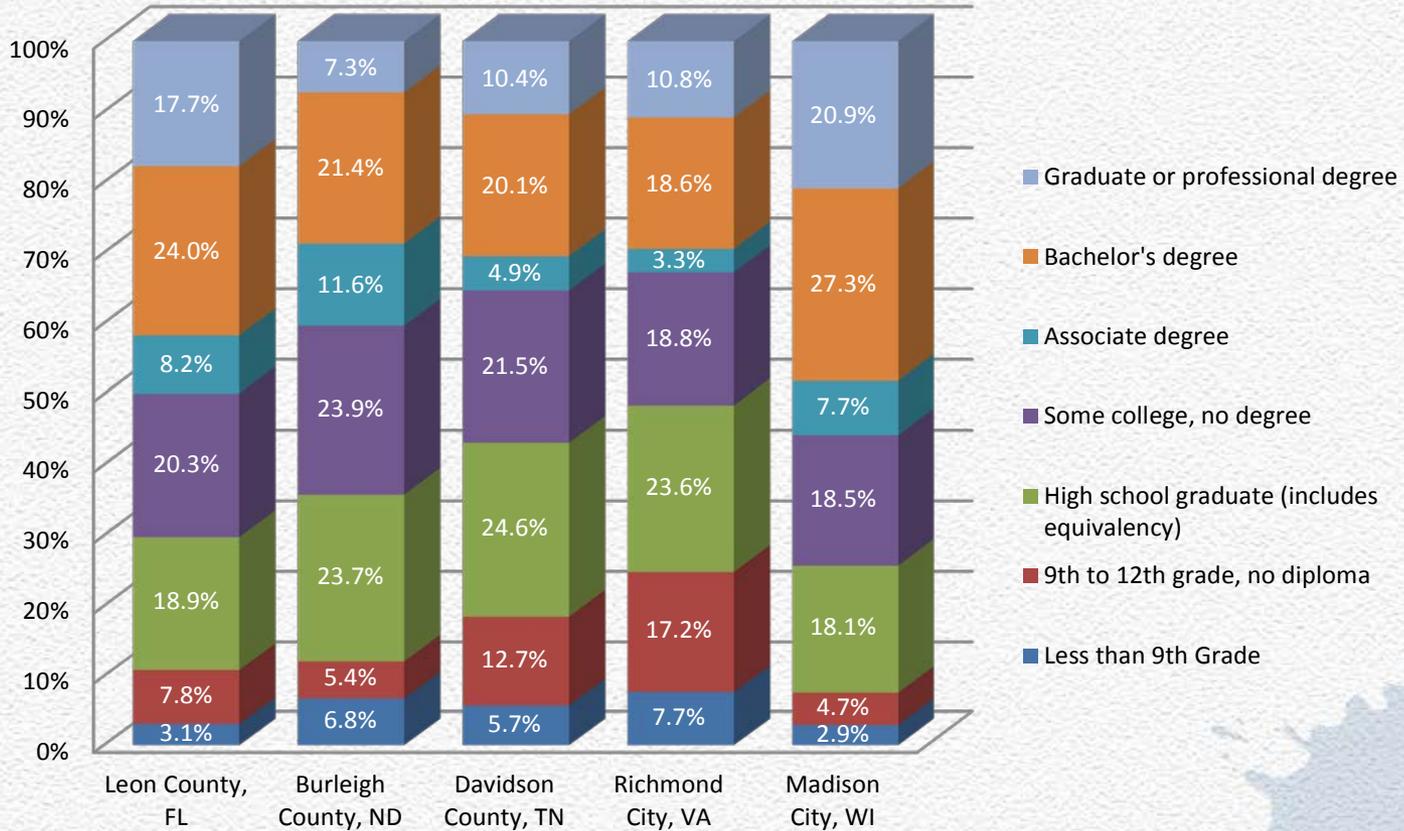
Median Household Income 2012



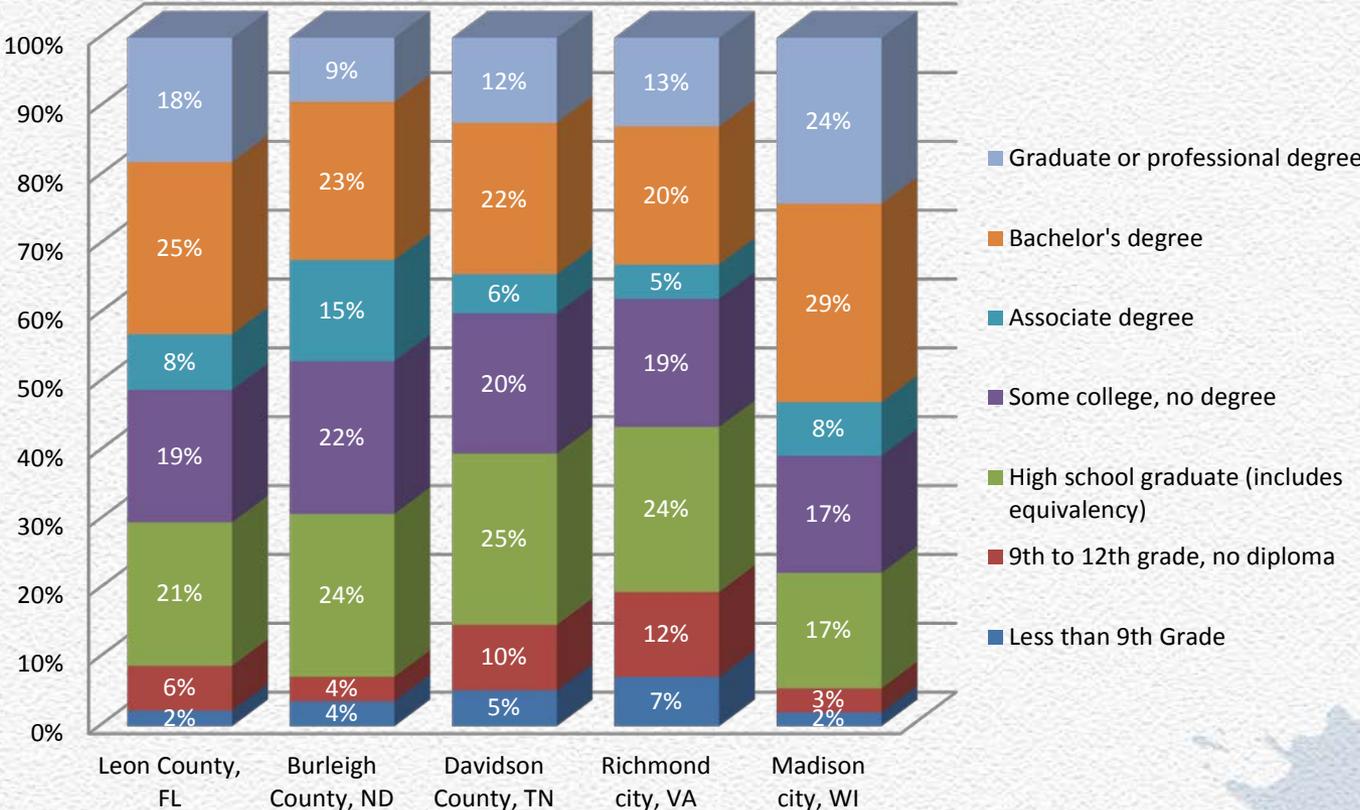
Poverty Rate (US Counties) 2012



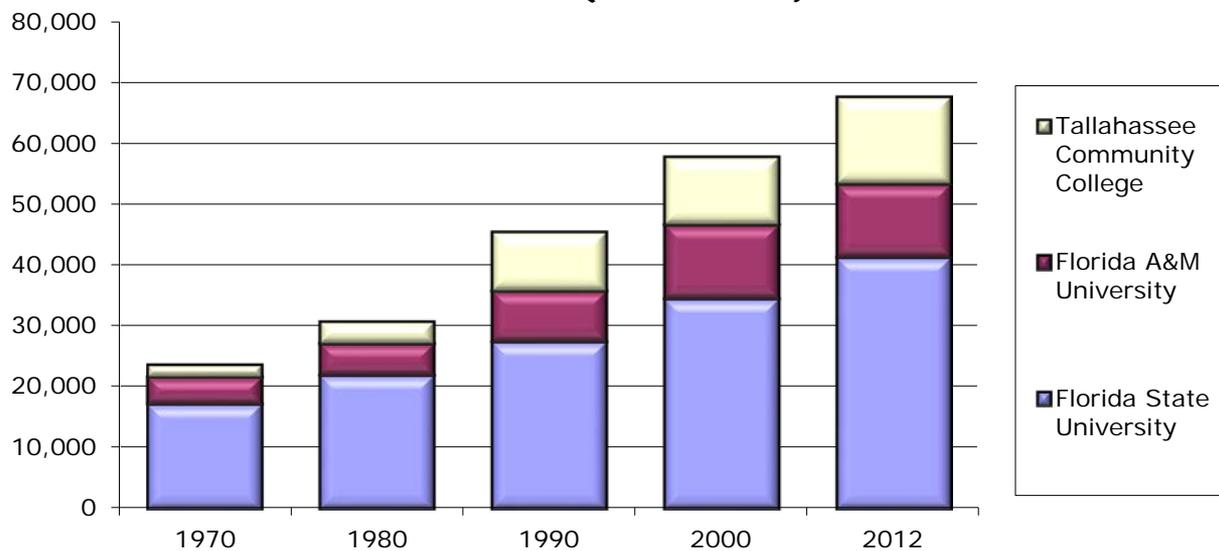
Comparisons in Educational Attainment, 2000



Comparisons in Educational Attainment, 2011



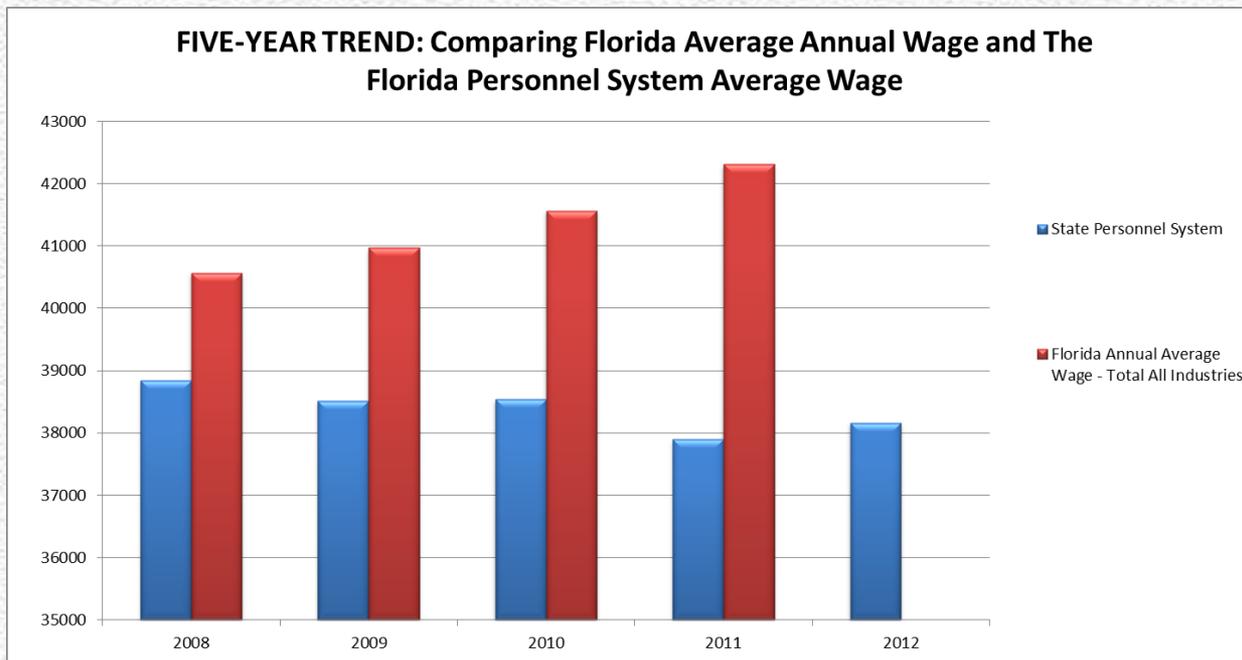
Fall Enrollment at Area Institutions of Higher Learning (1970-2012)



| Leon County Test Score State Rankings | | | | | | | | | |
|---------------------------------------|--------------------------------|------|---------|-----------|--------------------------------|------|---------|---------|-----------|
| | SAT (compared to 67 districts) | | | | ACT (compared to 67 districts) | | | | |
| Test | Writing | Math | Reading | Composite | English | Math | Reading | Science | Composite |
| Rank | 12th | 9th | 9th | 10th | 8th | 6th | 7th | 10th | 7th |
| Score | 523 | 527 | 498 | 1547 | 20.3 | 21.3 | 21.5 | 20 | 20.9 |

2012 Combined SAT Score vs National Average





- Over the past 10 years, the unemployment rate in Leon County ranged from a low in 2006 of 2.7% to a high in 2011 at 8.0%.
- Overall, the peer communities experienced similar unemployment trends since 2003 which demonstrates the national economic influence in these local communities.
- It is worth noting that the shifting of unemployment rates was unique for Leon County because its unemployment rate began to increase in 2006, a year before its peers with exception to Madison, WI. In addition, Leon County's unemployment rate continued to increase from 2010 to 2011 while the rest of the peer communities were starting to recover from the recession. In short, Leon's unemployment rate spiked first and recovered last.

Workforce Plus

Home Area Profile Summary, Workers Who Live in the Workforce Plus region

| Total Primary Jobs | | |
|--|-------------------------|--------------|
| | 2010 Census Data | |
| | Count | Share |
| Total Primary Jobs | 133,938 | 100.0% |
| Jobs by Worker Age | | |
| | 2010 Census Data | |
| | Count | Share |
| Age 29 or younger | 34,169 | 25.5% |
| Age 30 to 54 | 73,156 | 54.6% |
| Age 55 or older | 26,613 | 19.9% |
| Jobs by Earnings | | |
| | 2010 Census Data | |
| | Count | Share |
| \$1,250 per month or less | 29,511 | 22.0% |
| \$1,251 to \$3,333 per month | 58,564 | 43.7% |
| More than \$3,333 per month | 45,863 | 34.2% |
| Jobs by NAICS Industry Sector | | |
| | 2010 Census Data | |
| | Count | Share |
| Agriculture, Forestry, Fishing and Hunting | 1,327 | 1.0% |
| Mining, Quarrying, and Oil and Gas Extraction | 149 | 0.1% |
| Utilities | 238 | 0.2% |
| Construction | 5,255 | 3.9% |
| Manufacturing | 3,567 | 2.7% |
| Wholesale Trade | 2,903 | 2.2% |
| Retail Trade | 13,566 | 10.1% |
| Transportation and Warehousing | 1,658 | 1.2% |
| Information | 3,118 | 2.3% |
| Finance and Insurance | 4,289 | 3.2% |
| Real Estate and Rental and Leasing | 1,668 | 1.2% |
| Professional, Scientific, and Technical Services | 9,419 | 7.0% |
| Management of Companies and Enterprises | 514 | 0.4% |
| Administration & Support, Waste Management and Remediation | 6,201 | 4.6% |
| Educational Services | 15,831 | 11.8% |
| Health Care and Social Assistance | 16,360 | 12.2% |
| Arts, Entertainment, and Recreation | 1,219 | 0.9% |
| Accommodation and Food Services | 11,733 | 8.8% |
| Other Services (excluding Public Administration) | 4,372 | 3.3% |
| Public Administration | 30,551 | 22.8% |

Source: U.S. Census Bureau, Local Employment Dynamics program

Workforce Plus

Home Area Profile Summary, cont'd

| Jobs by Worker Race | | |
|---|-------------------------|--------------|
| | 2010 Census Data | |
| | Count | Share |
| White Alone | 92,932 | 69.4% |
| Black or African American Alone | 36,468 | 27.2% |
| American Indian or Alaska Native Alone | 469 | 0.4% |
| Asian Alone | 2,777 | 2.1% |
| Native Hawaiian or Other Pacific Islander Alone | 75 | 0.1% |
| Two or More Race Groups | 1,217 | 0.9% |
| Jobs by Worker Ethnicity | | |
| | 2010 Census Data | |
| | Count | Share |
| Not Hispanic or Latino | 127,810 | 95.4% |
| Hispanic or Latino | 6,128 | 4.6% |
| Jobs by Worker Educational Attainment | | |
| | 2010 Census Data | |
| | Count | Share |
| Less than high school | 10,592 | 7.9% |
| High school or equivalent, no college | 26,643 | 19.9% |
| Some college or Associate degree | 33,225 | 24.8% |
| Bachelor's degree or advanced degree | 29,309 | 21.9% |
| Educational attainment not available (workers aged 29 or younger) | 34,169 | 25.5% |
| Jobs by Worker Gender | | |
| | 2010 Census Data | |
| | Count | Share |
| Male | 63,767 | 47.6% |
| Female | 70,171 | 52.4% |

Source: U.S. Census Bureau, Local Employment Dynamics program

Workforce Plus Labor Inflow/Outflow Summary

| Workforce Plus Labor Market Size (Primary Jobs) | | |
|--|-------------------------|--------------|
| | 2010 Census Data | |
| | Count | Share |
| Employed in the Selection Area | 170,136 | 100.0% |
| Living in the Selection Area | 133,938 | 78.7% |
| Net Job Inflow (+) or Outflow (-) | 36,198 | - |
| In-Area Labor Force Efficiency (Primary Jobs) | | |
| | 2010 Census Data | |
| | Count | Share |
| Living in the Selection Area | 133,938 | 100.0% |
| Living and Employed in the Selection Area | 109,677 | 81.9% |
| Living in the Selection Area but Employed Outside | 24,261 | 18.1% |
| In-Area Employment Efficiency (Primary Jobs) | | |
| | 2010 Census Data | |
| | Count | Share |
| Employed in the Selection Area | 170,136 | 100.0% |
| Employed and Living in the Selection Area | 109,677 | 64.5% |
| Employed in the Selection Area but Living Outside | 60,459 | 35.5% |
| Outflow Job Characteristics (Primary Jobs) | | |
| | 2010 Census Data | |
| | Count | Share |
| External Jobs Filled by Residents | 24,261 | 100.0% |
| Workers Aged 29 or younger | 8,015 | 33.0% |
| Workers Aged 30 to 54 | 12,418 | 51.2% |
| Workers Aged 55 or older | 3,828 | 15.8% |
| Workers Earning \$1,250 per month or less | 7,433 | 30.6% |
| Workers Earning \$1,251 to \$3,333 per month | 10,464 | 43.1% |
| Workers Earning More than \$3,333 per month | 6,364 | 26.2% |
| Workers in the "Goods Producing" Industry Class | 2,637 | 10.9% |
| Workers in the "Trade, Transportation, and Utilities" Industry Class | 7,361 | 30.3% |
| Workers in the "All Other Services" Industry Class | 14,263 | 58.8% |

Source: U.S. Census Bureau, Local Employment Dynamics program

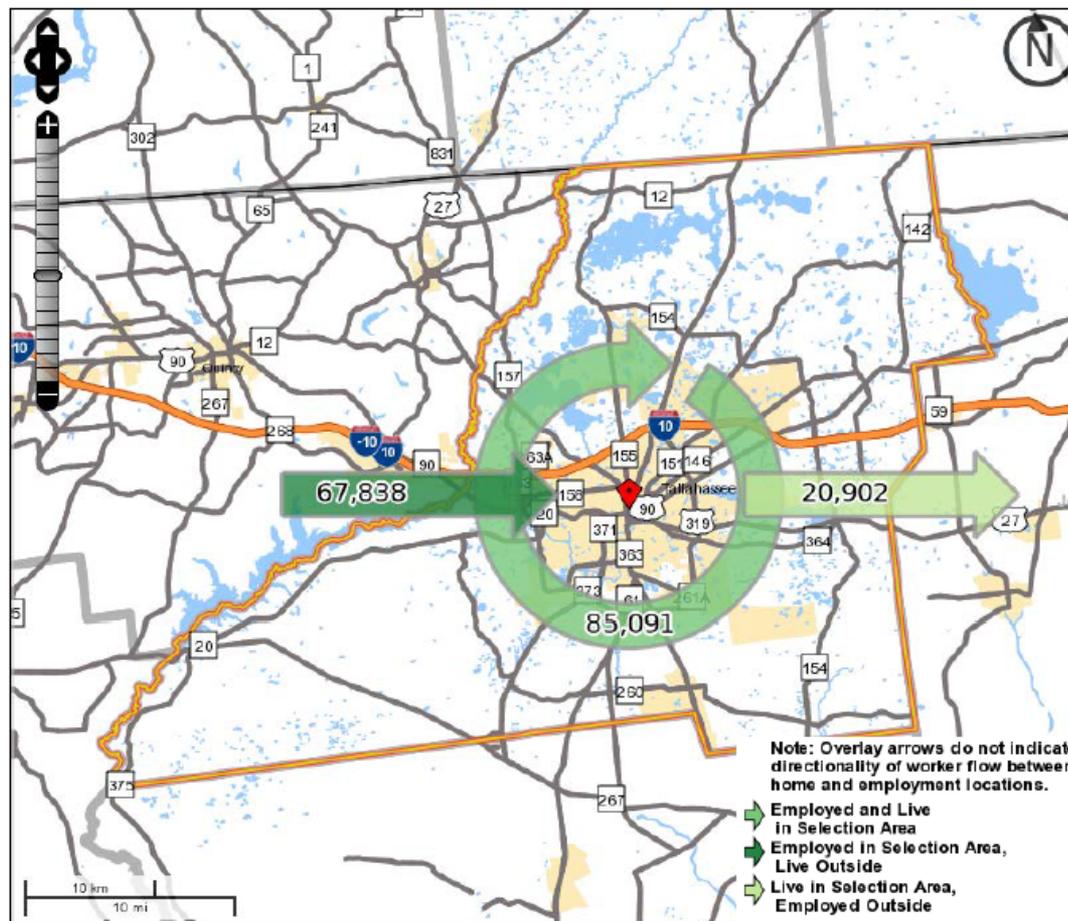
Workforce Plus

Labor Inflow/Outflow Summary, cont'd

| Inflow Job Characteristics (Primary Jobs) | | |
|--|-------------------------|--------------|
| | 2010 Census Data | |
| | Count | Share |
| Internal Jobs Filled by Outside Workers | 60,459 | 100.0% |
| Workers Aged 29 or younger | 16,079 | 26.6% |
| Workers Aged 30 to 54 | 33,013 | 54.6% |
| Workers Aged 55 or older | 11,367 | 18.8% |
| Workers Earning \$1,250 per month or less | 15,303 | 25.3% |
| Workers Earning \$1,251 to \$3,333 per month | 28,134 | 46.5% |
| Workers Earning More than \$3,333 per month | 17,022 | 28.2% |
| Workers in the "Goods Producing" Industry Class | 4,165 | 6.9% |
| Workers in the "Trade, Transportation, and Utilities" Industry Class | 14,637 | 24.2% |
| Workers in the "All Other Services" Industry Class | 41,657 | 68.9% |
| Interior Flow Job Characteristics (Primary Jobs) | | |
| | 2010 Census Data | |
| | Count | Share |
| Internal Jobs Filled by Residents | 109,677 | 100.0% |
| Workers Aged 29 or younger | 26,154 | 23.8% |
| Workers Aged 30 to 54 | 60,738 | 55.4% |
| Workers Aged 55 or older | 22,785 | 20.8% |
| Workers Earning \$1,250 per month or less | 22,078 | 20.1% |
| Workers Earning \$1,251 to \$3,333 per month | 48,100 | 43.9% |
| Workers Earning More than \$3,333 per month | 39,499 | 36.0% |
| Workers in the "Goods Producing" Industry Class | 7,661 | 7.0% |
| Workers in the "Trade, Transportation, and Utilities" Industry Class | 11,004 | 10.0% |
| Workers in the "All Other Services" Industry Class | 91,012 | 83.0% |

Source: U.S. Census Bureau, Local Employment Dynamics program

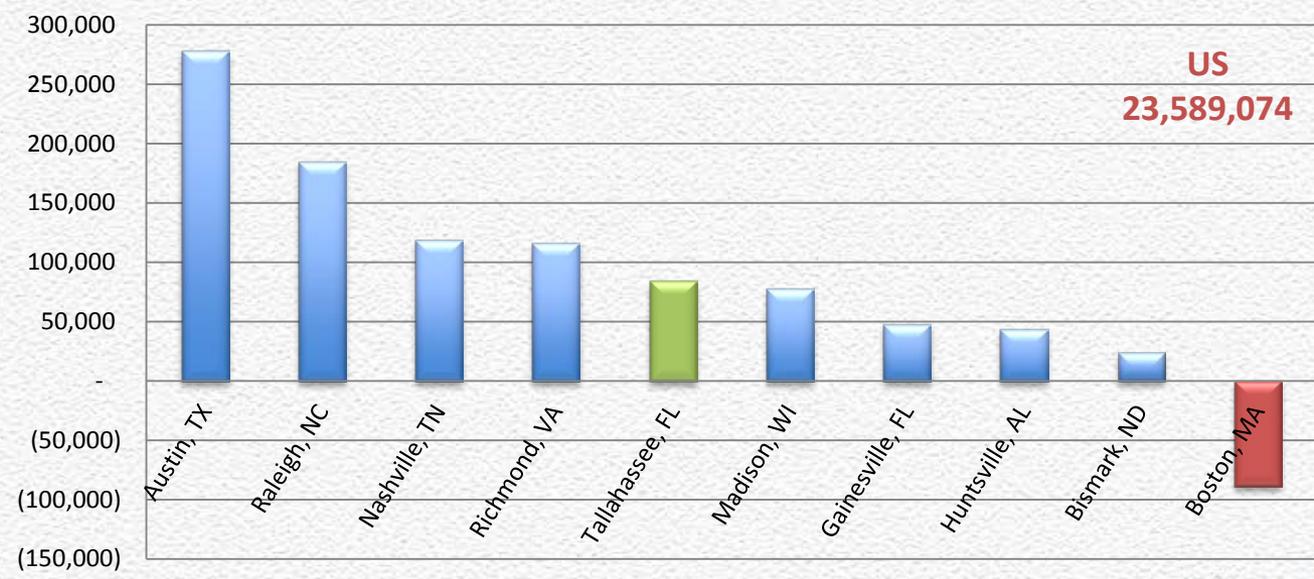
Workforce Plus Labor Inflow/Outflow Map—Leon County



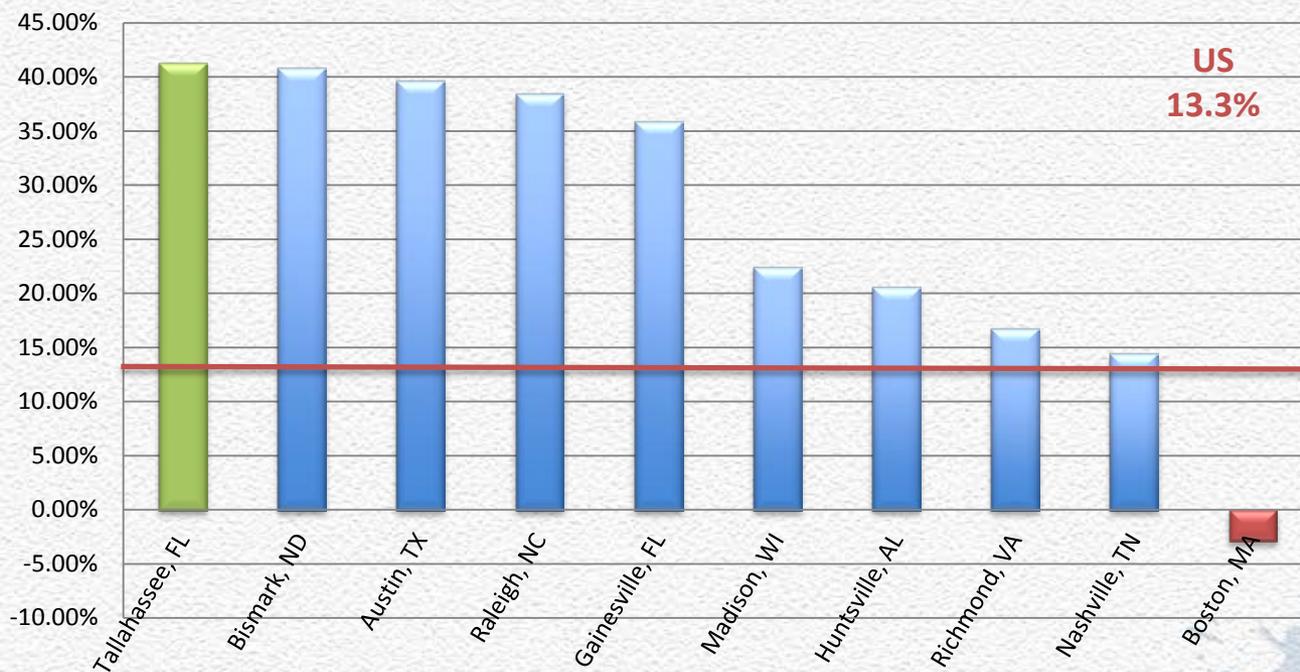
Source: U.S. Census Bureau, Local Employment Dynamics program

- Of the 152,929 people who are employed in Leon County, 85,091 live and work in the county.
- There are 67,838 workers who live outside Leon County and work in the county. Of the 105,993 workers who live in Leon County, there are 20,902 residents who work outside the area. There is a new job inflow of 46,936 workers.
- The top five work destination counties for Leon County workers are Duval, Gadsden, Bay, Escambia and Hillsborough counties.

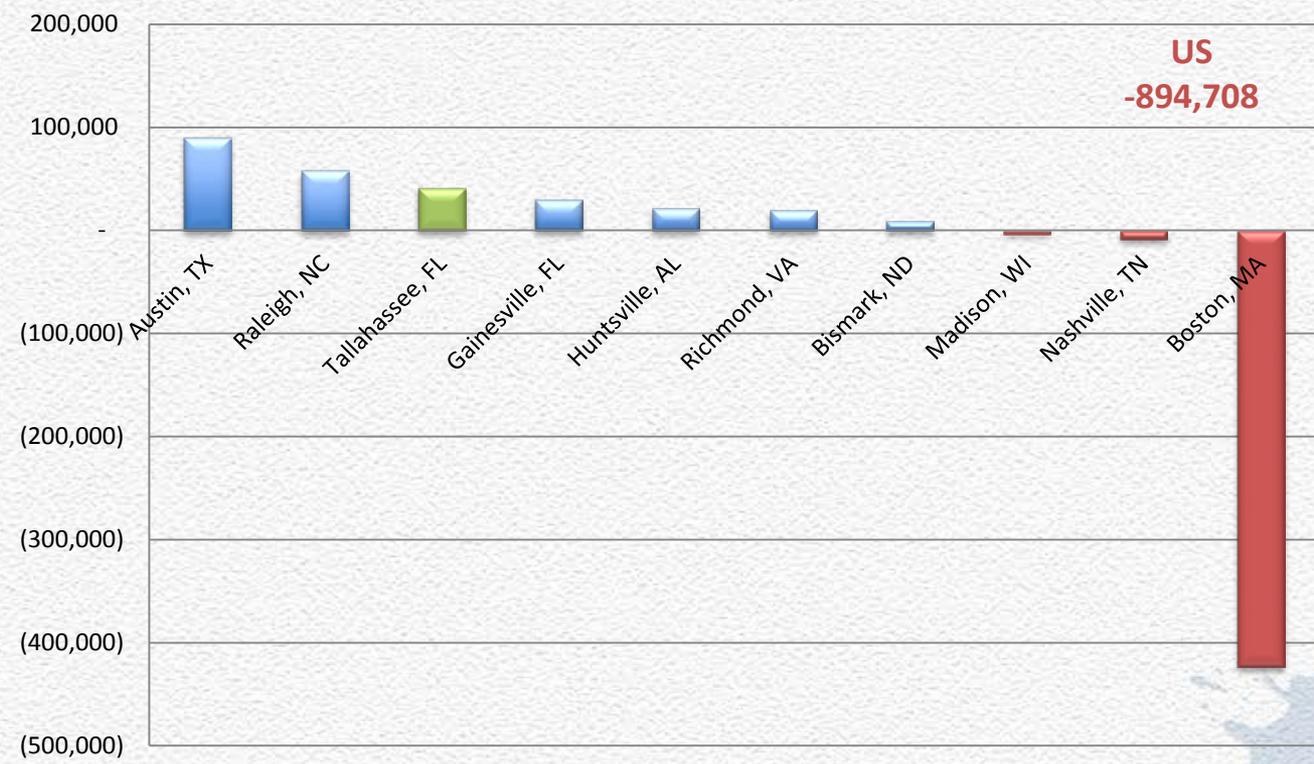
Net Growth in Jobs 1997-2010



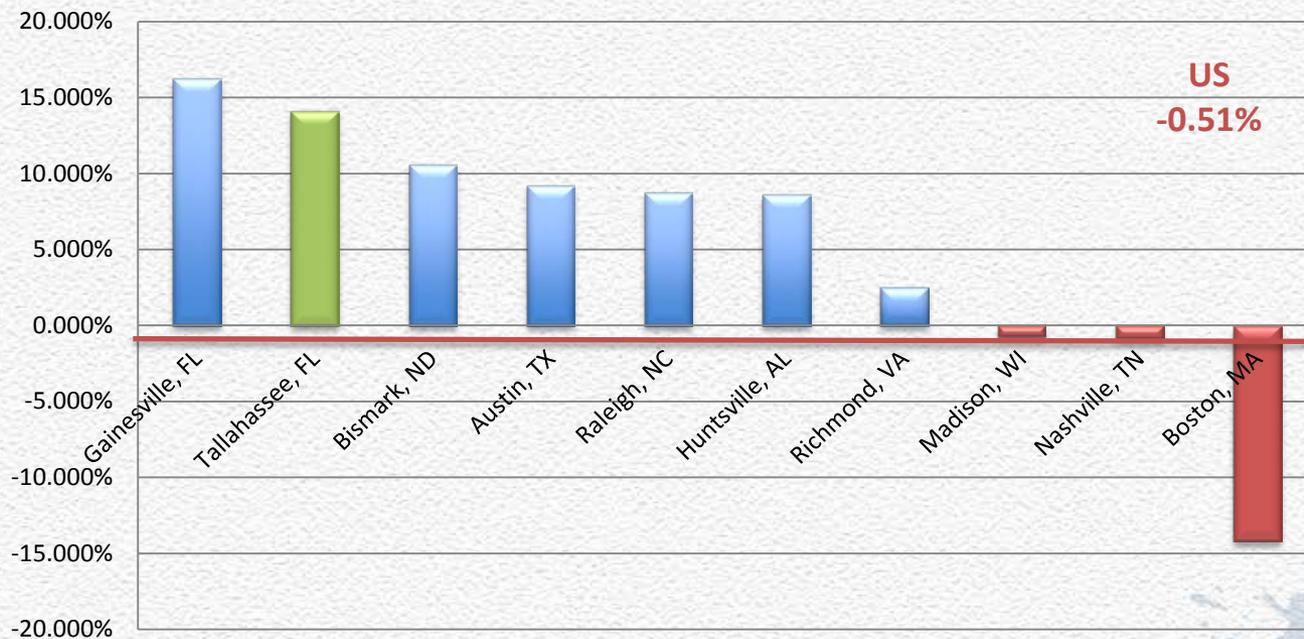
Net Growth in Jobs 1997-2010 Percentage Basis



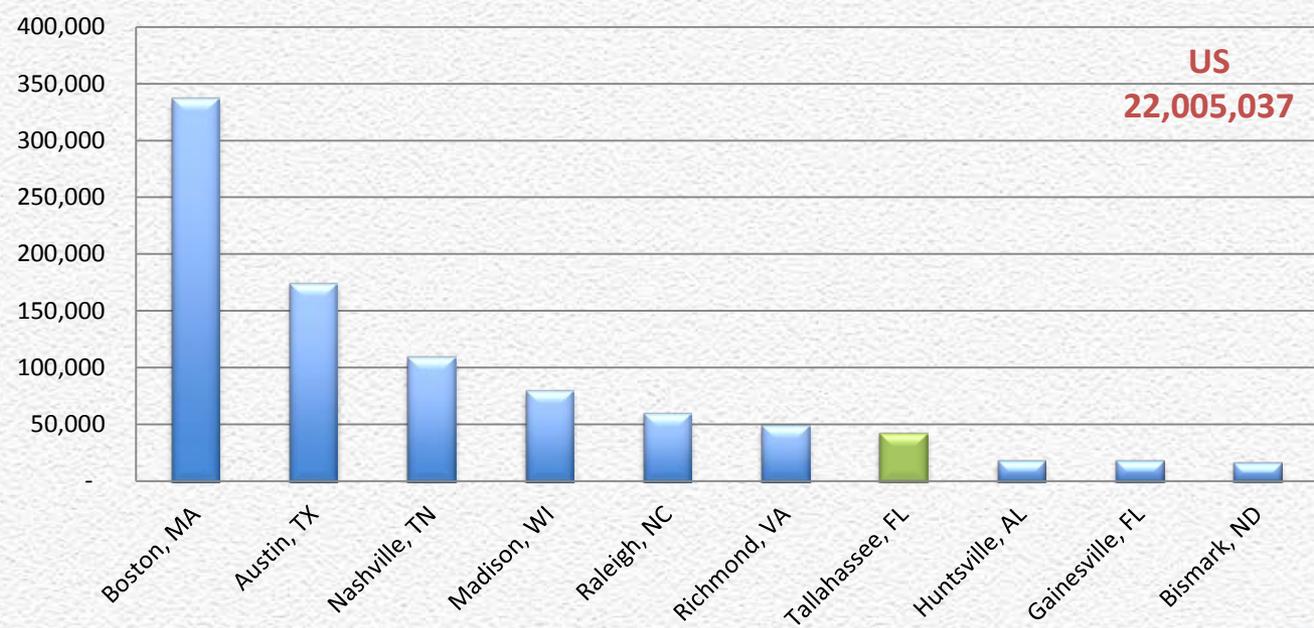
Net Growth in Job Creation 1997-2010



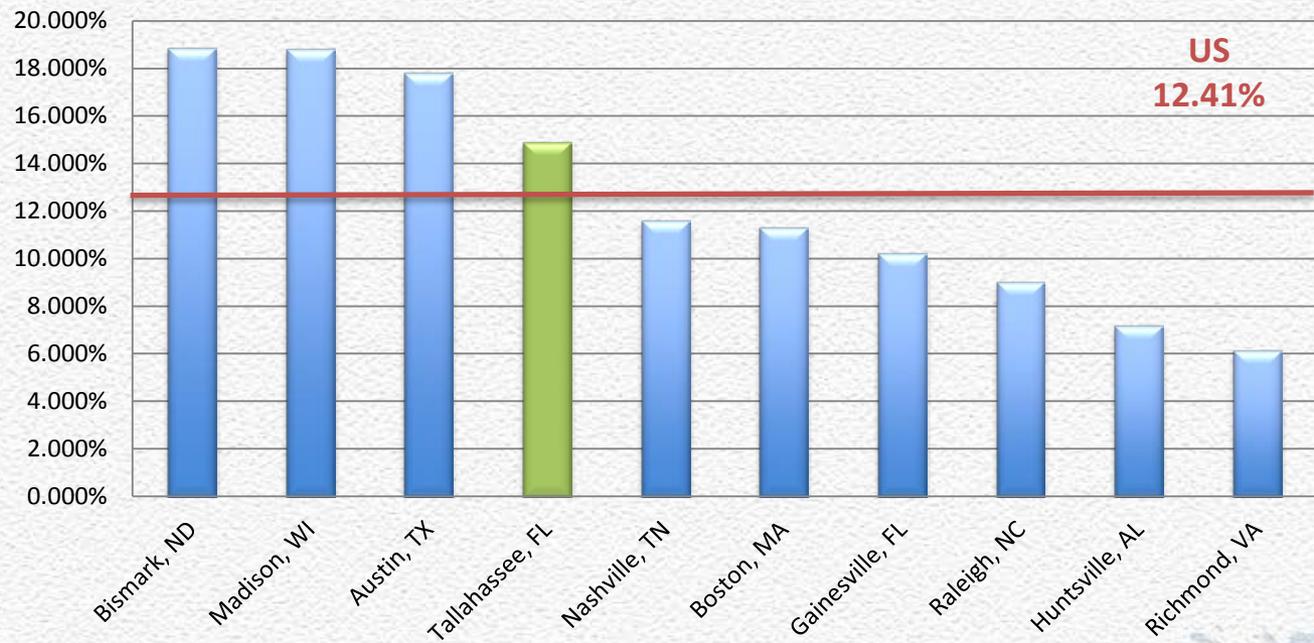
Net Growth in Job Creation 1997-2010 Percentage Basis



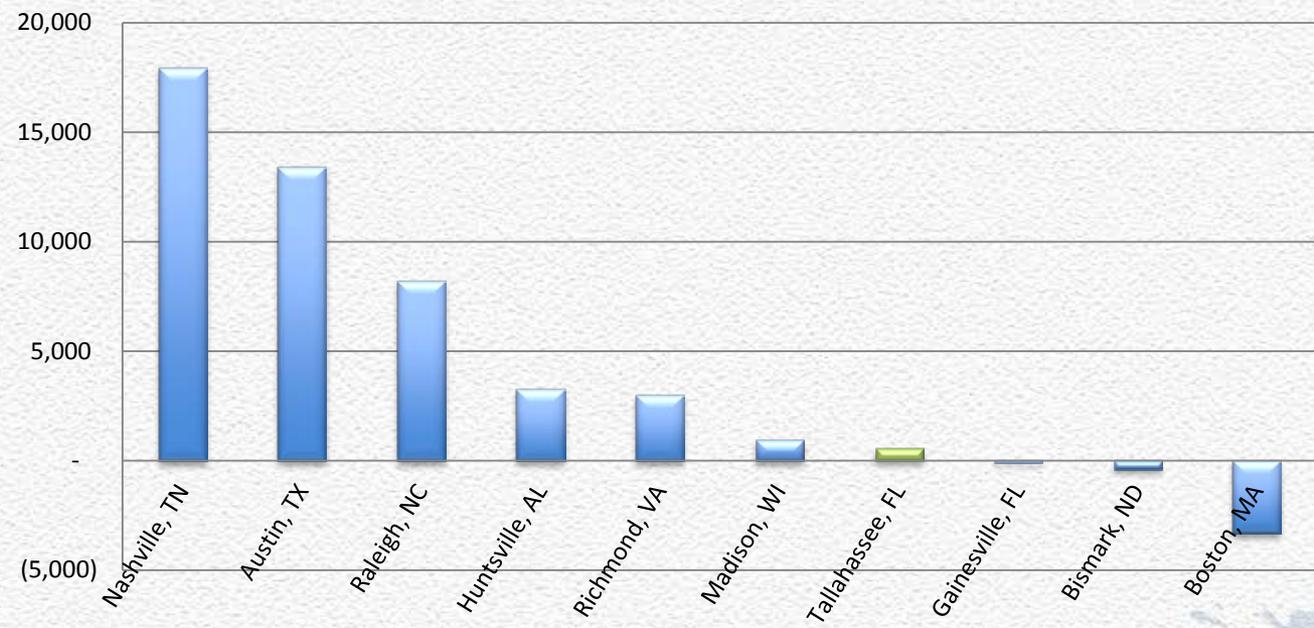
Net Growth in Job Expansion 1997-2010



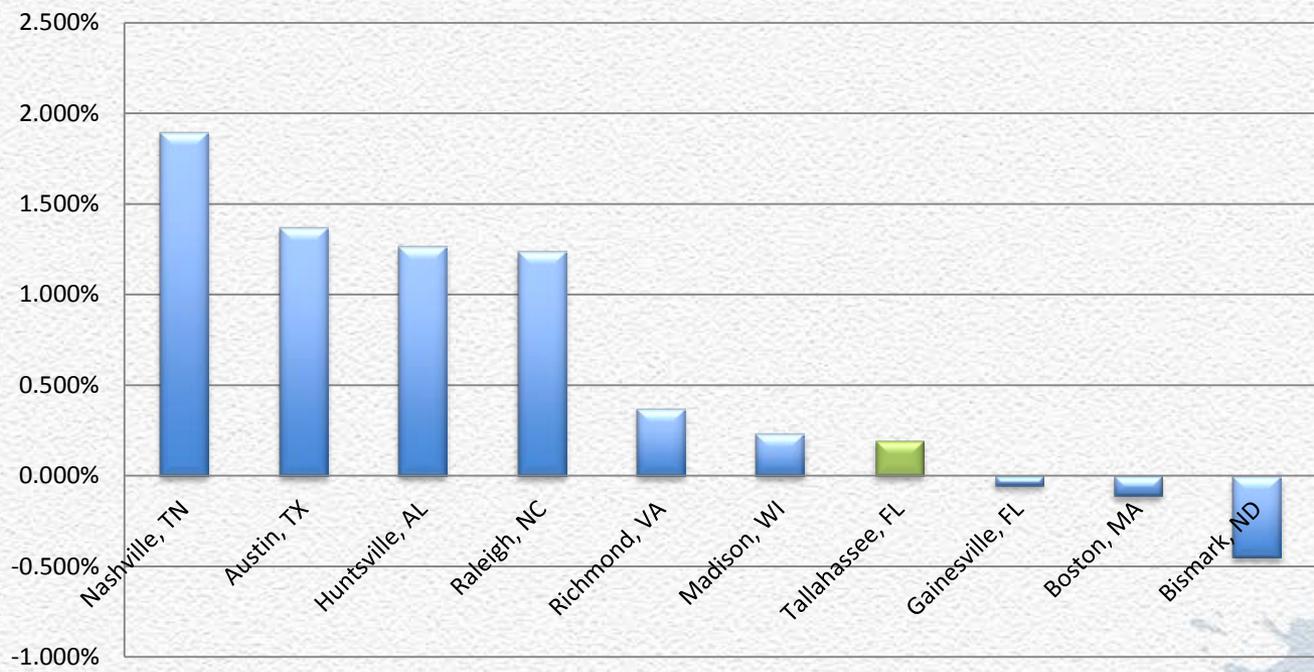
Net Growth in Job Expansion 1997-2010 Percentage Basis



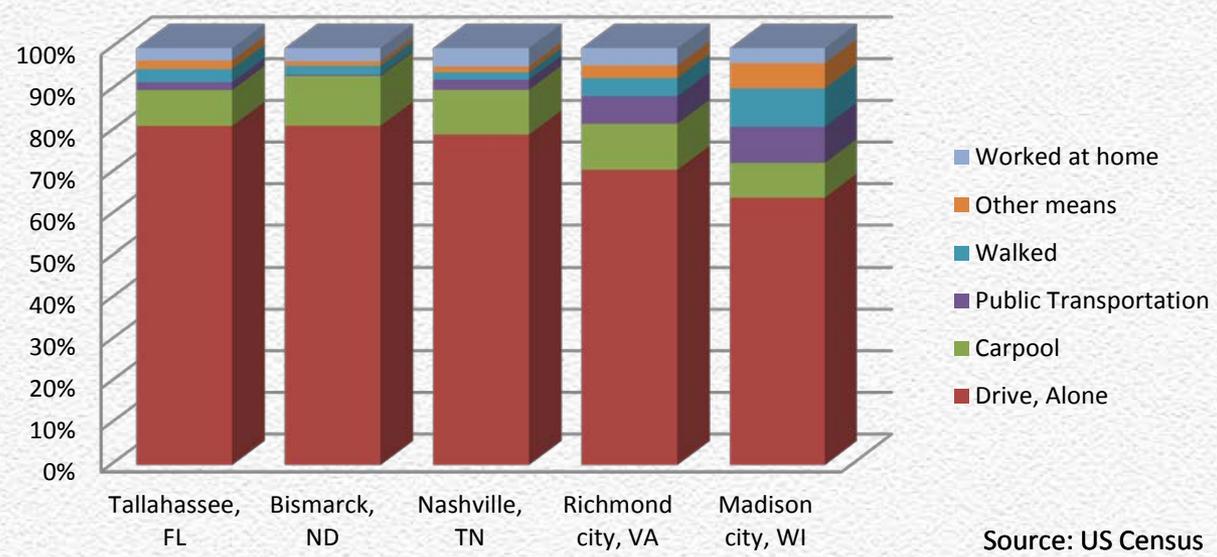
Net Growth in Job Relocation 1997-2010



Net Growth in Job Relocation 10097-2010 Percentage Basis

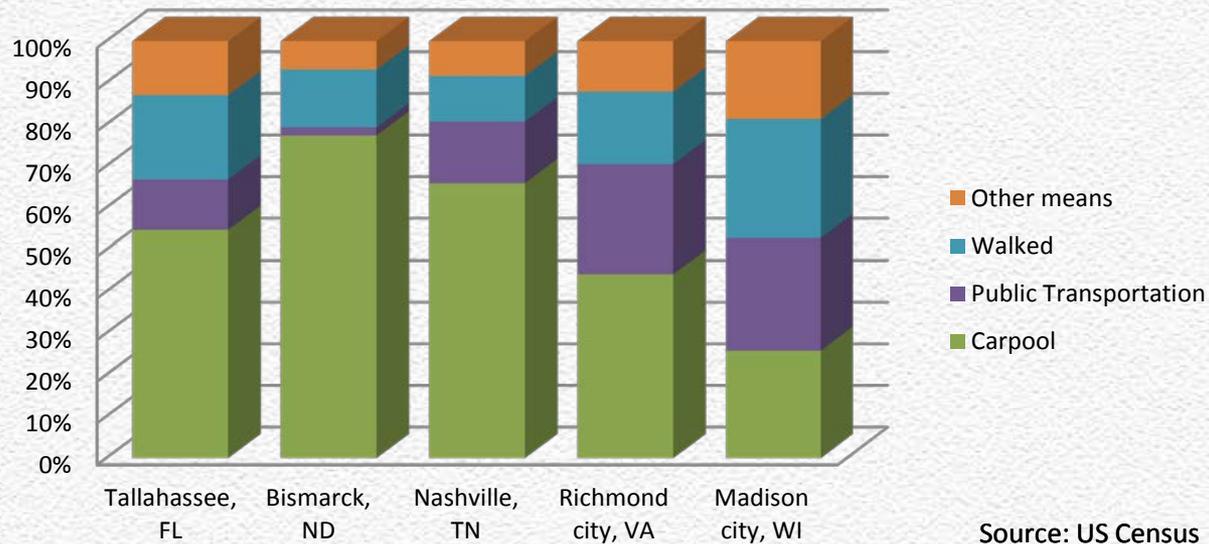


Commute Summary



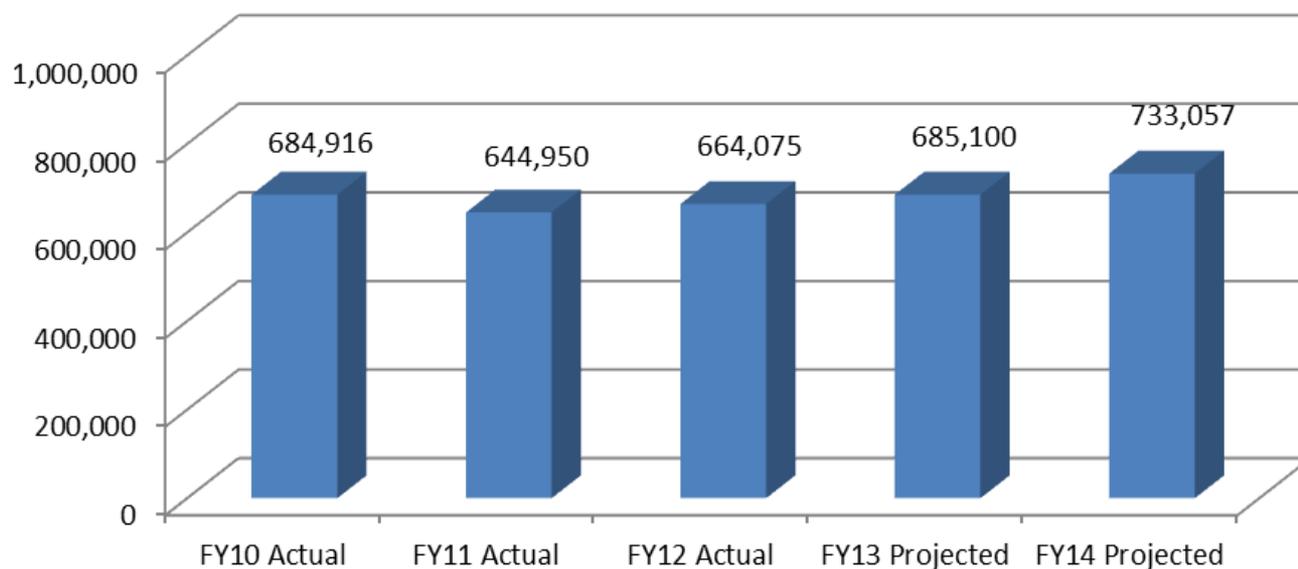
Source: US Census

Commute Method (Excludes Driving Alone)



Source: US Census

Total Passengers (Enplanements & Deplanements) FY 2010 - FY 2014



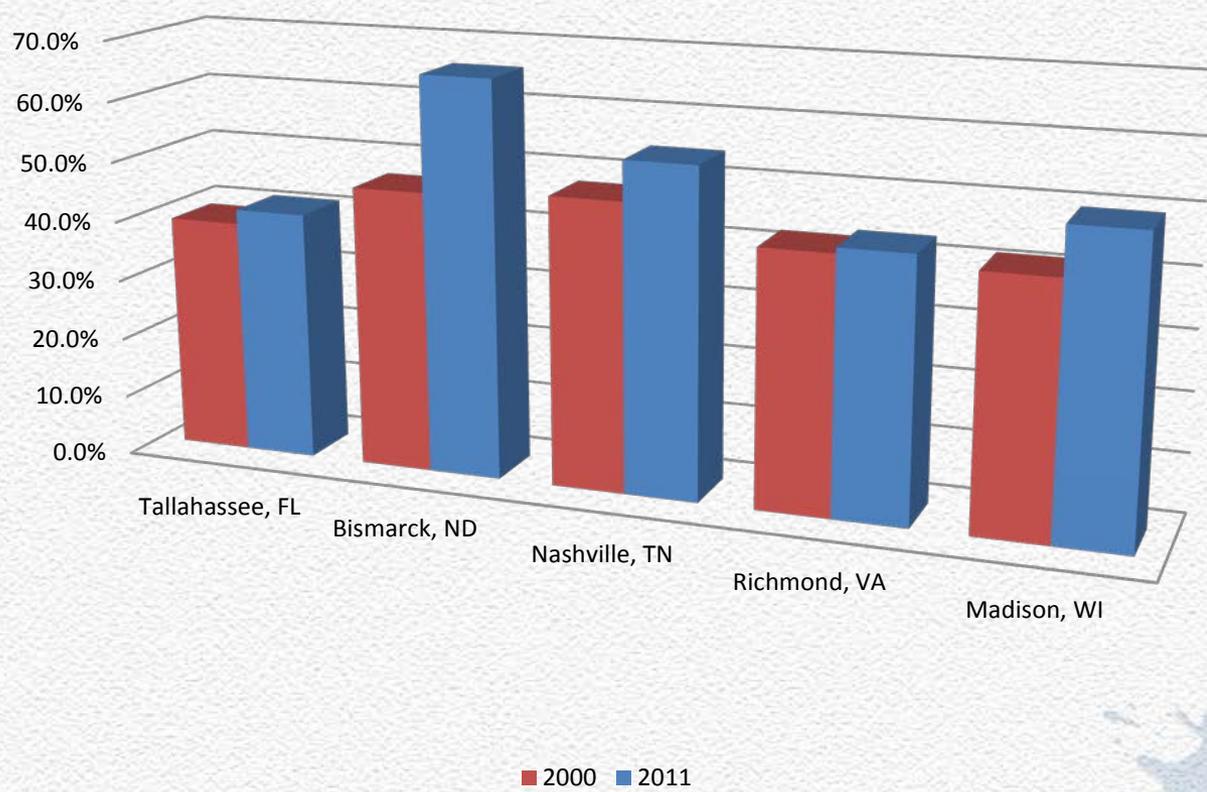
Summary of Domestic Airport Activity
 Tallahassee Regional Airport (TLH)
 As of Summer 2011

| Destination Served | Weekly Departures | | Carrier | |
|--------------------|-------------------|------|---------------|---------------|
| | 2010 | 2011 | 2010 | 2011 |
| Atlanta | 67 | 66 | DL | DL |
| Charlotte | 27 | 27 | US | US |
| Tampa | 22 | 20 | CO | CO |
| Ft. Lauderdale | 18 | 18 | CO(12), DL(6) | CO(12), DL(6) |
| Miami | 19 | 14 | AA | AA |
| Dallas/Ft. Worth | 7 | 7 | AA | AA |
| Memphis | 20 | 0 | DL | - |
| Total | 180 | 152 | | |

Source: Official Airline Guide, July 2011

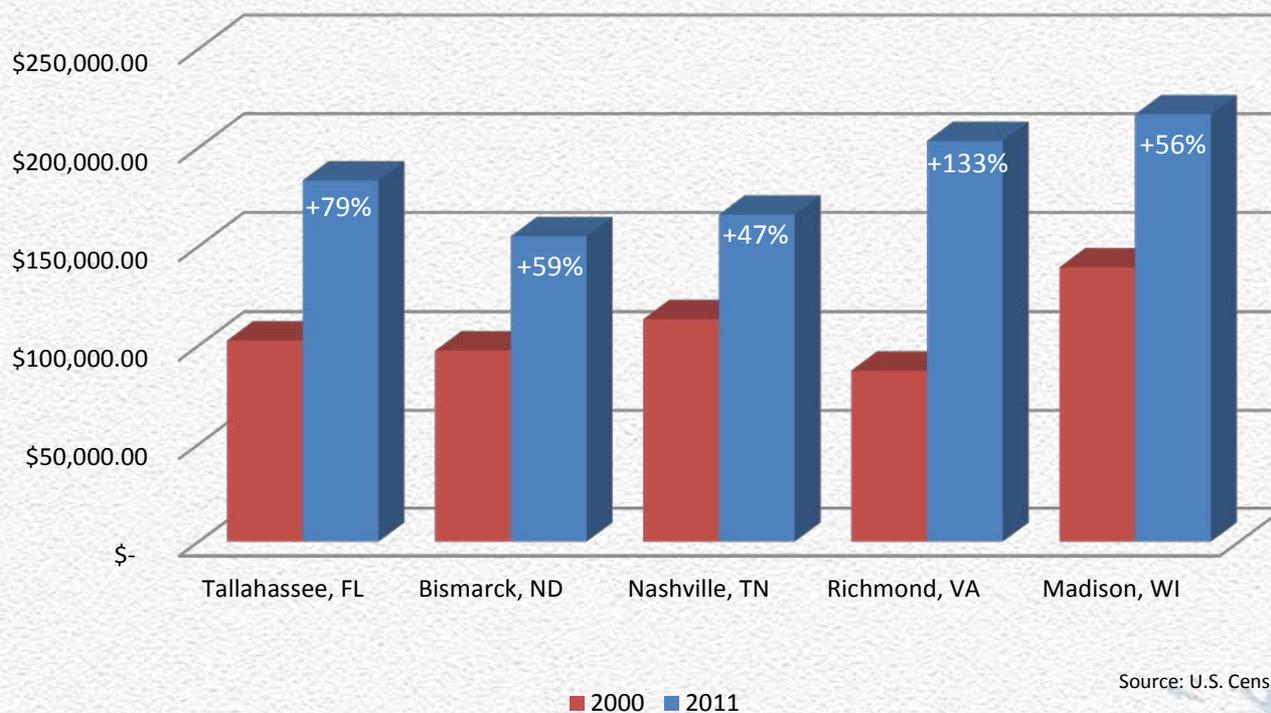
Carrier Legend: DL- Delta Airlines, US- US Airlines, AA- American Airlines, CO- Continental

Homeownership Rate

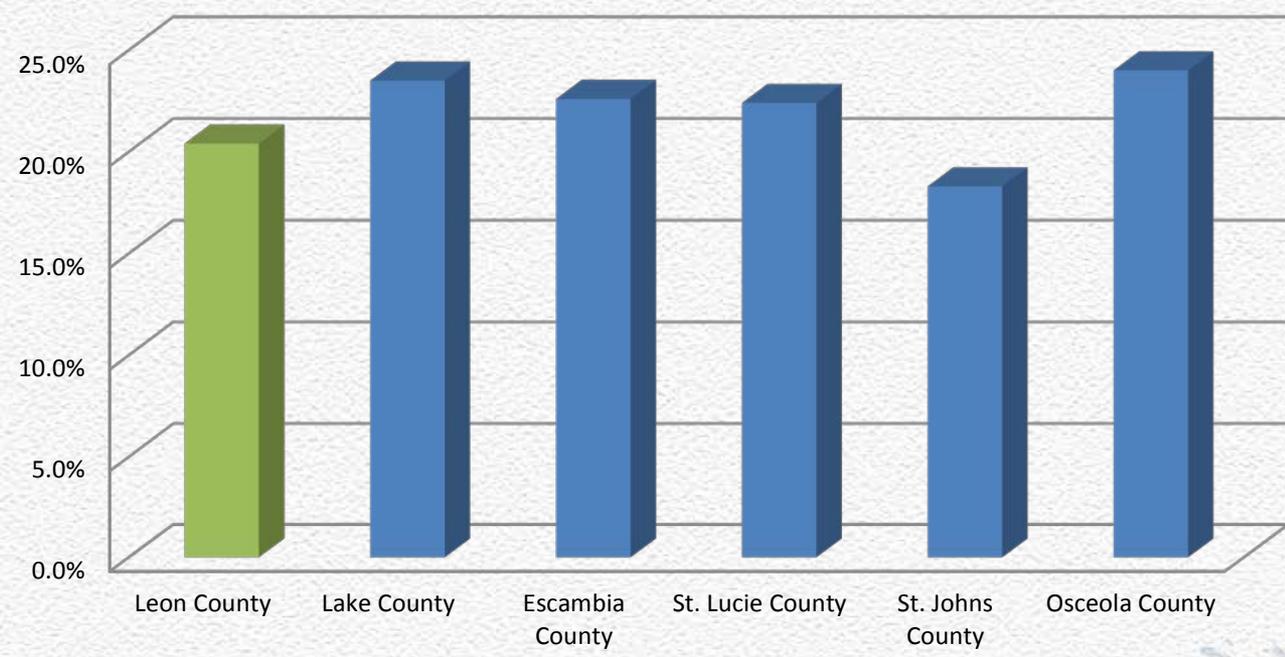


Source: U.S. Census

Median Value of Owner-Occupied Housing Units

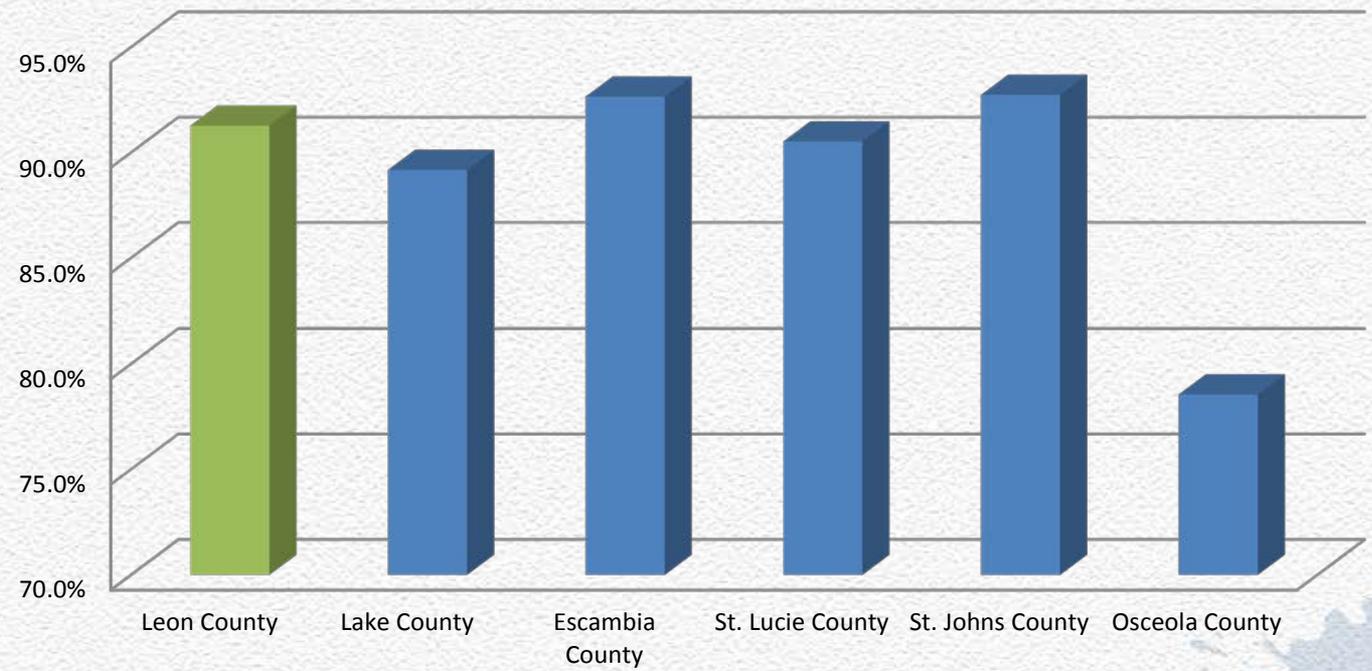


% Low Income Households



Source: Meridian Appraisal Group

% Unfulfilled Low Income Housing Demand



Source: Meridian Appraisal Group

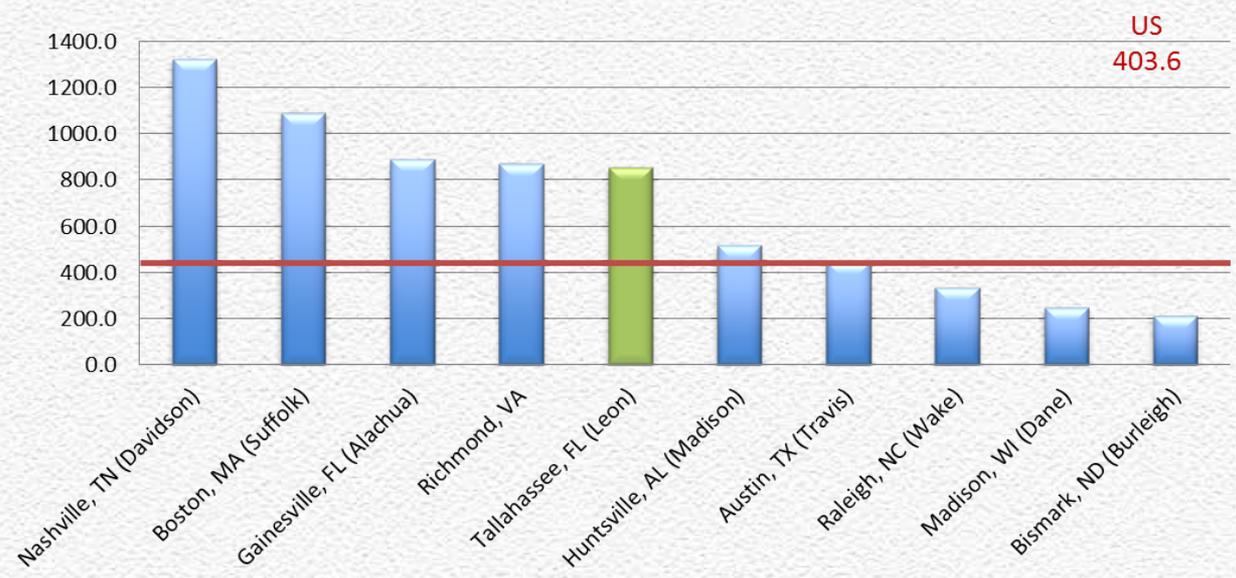
| Info from TPD on the above data request: | | | |
|--|----------|----------|----------|
| Tallahassee Police Department | 2010 | 2011 | 2012 |
| Priority 1 Calls for Service | 1,833 | 1,740 | 1,615 |
| Avg. Response Time Priority 1 Calls | 6.6 mins | 6.7 mins | 6.6 mins |
| DUI Arrests | 242 | 319 | 345 |
| Traffic Citations | 20,992 | 22,989 | 23,475 |

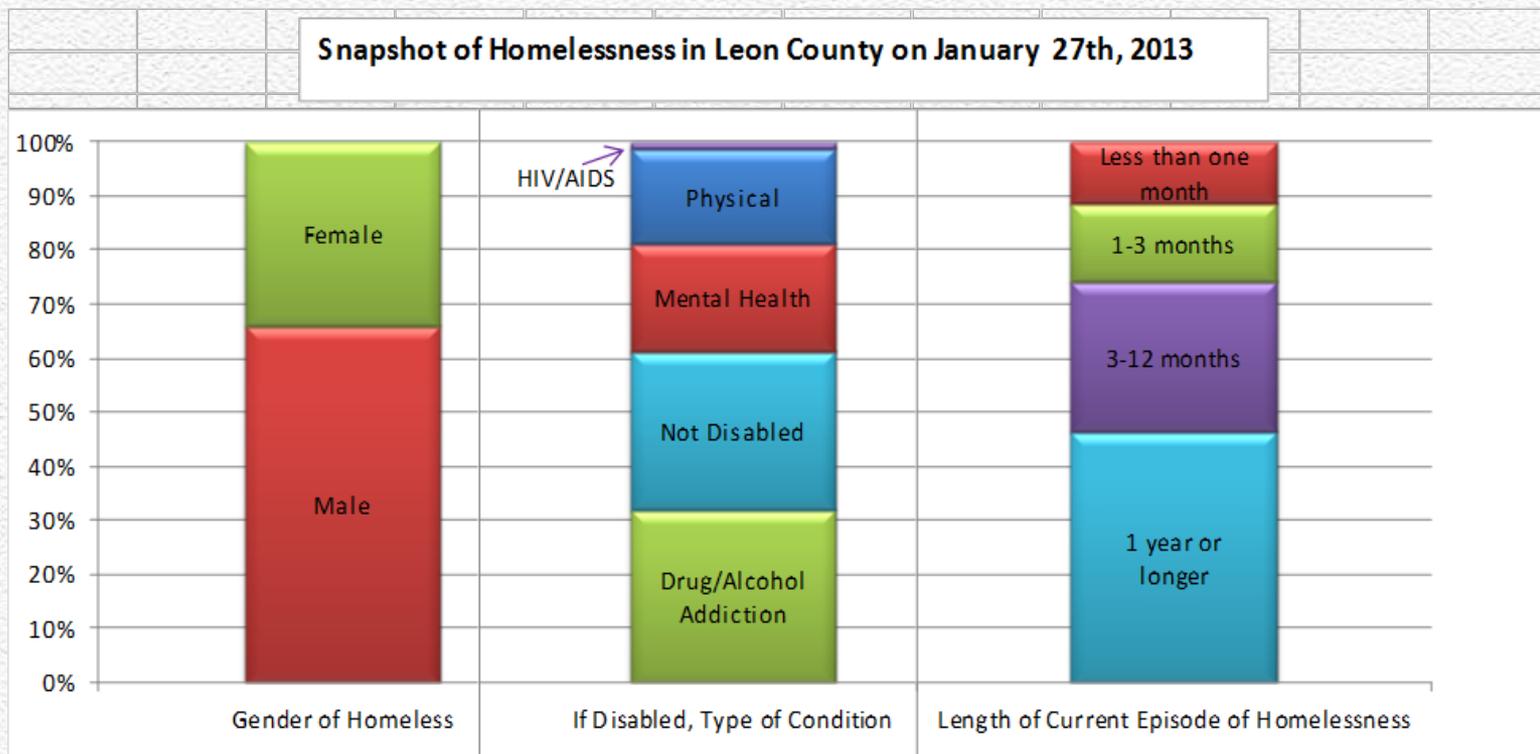
| Leon County EMS | 2010 | 2011 | 2012 |
|-----------------------------|-----------|-----------|-----------|
| Emergency Service Calls | 31,076 | 31,062 | 33,873 |
| Patient Transports | 22,144 | 22,567 | 23,593 |
| FTEs | 111 | 111 | 111 |
| Avg. Response Time to Calls | 9.15 mins | 9.23 mins | 9.35 mins |

| Leon County Sheriff Office | 2010 | 2011 | 2012 |
|-----------------------------|----------|-----------|-----------|
| Emergency Service Calls* | | | |
| Avg. Response Time to Calls | 8.5 mins | 9.12 mins | 8.15 mins |
| DUI Arrests | 126 | 94 | 65 |
| Traffic Citations | 3,969 | 2,933 | 3,013 |

*On average, the Sheriff's Office Emergency calls are normally 40% of the overall county's call volume. The exact number of emergency calls is difficult to estimate due to the fact the Sheriff is currently in the process of moving to a new CAD system as part of the new dispatch operations center.

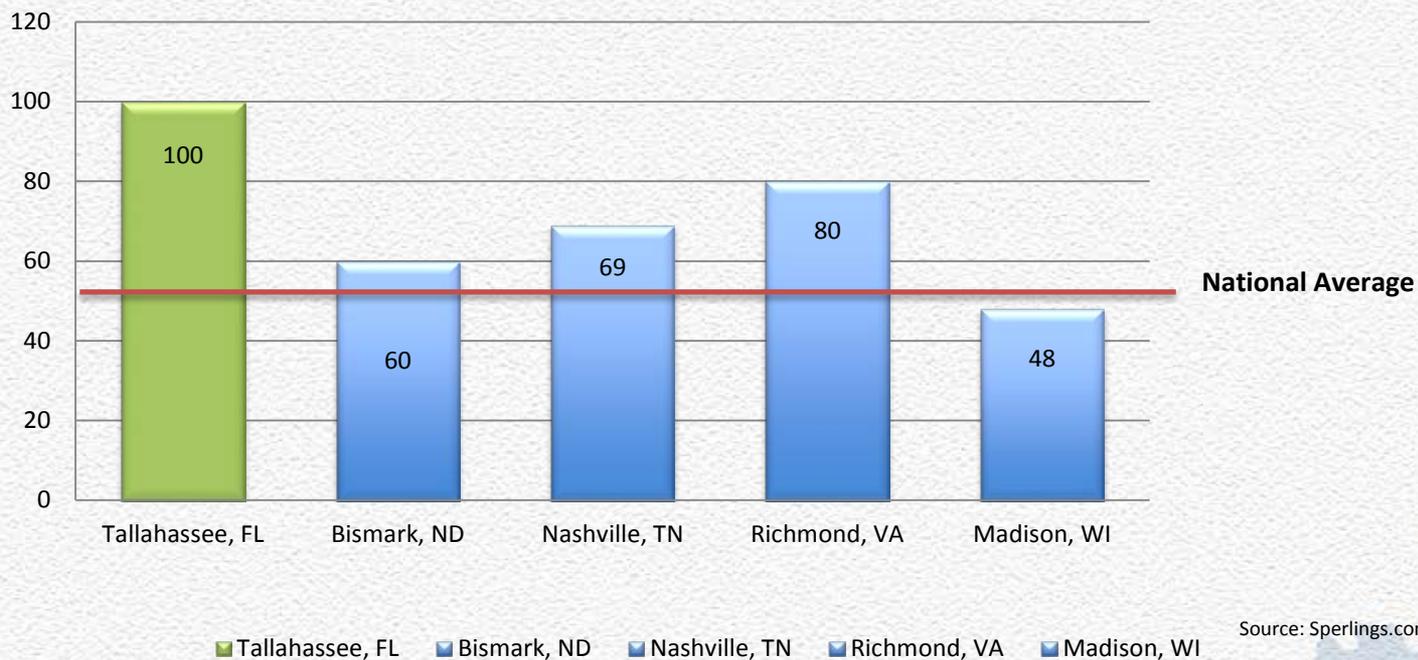
Violent Crime (per 100,000) US Counties 2012





On January 27th, 2013 there were 1,078 homeless individuals in Tallahassee. As you can see in the data above, the overwhelming majority of homeless persons in Tallahassee have some type of disability. Almost half have are homeless for a year or longer, and the majority are males.

Water Quality



In comparison to the United States and its peer communities, Tallahassee, FL is a leader in water quality. Water quality in Tallahassee is nearly double that of the national average.

