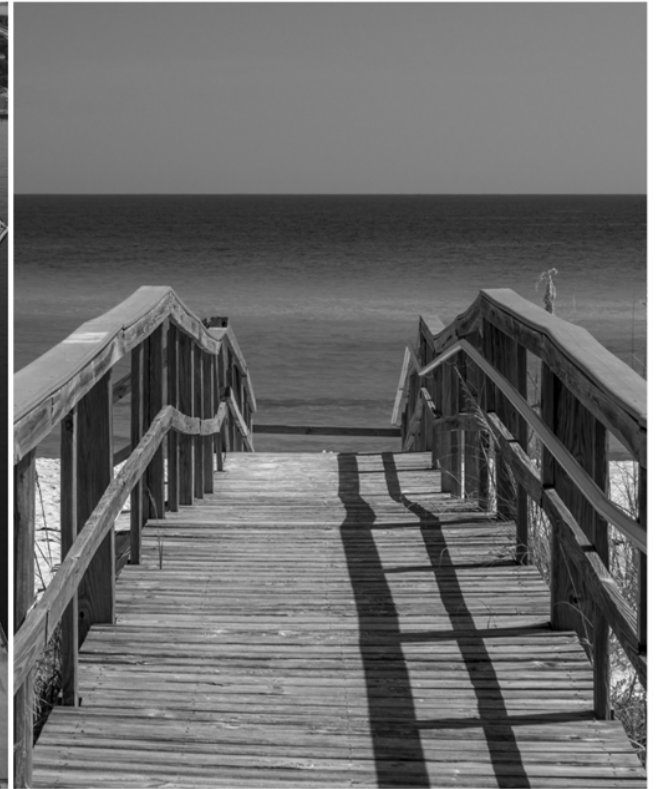


# EMERALD COAST REGIONAL COUNCIL COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

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2022-2026



## 2024 Annual Performance Report



*Comprehensive Economic Development Strategy, June 2021*

*2024 Annual Performance Report, October 2024*

Funding for this report is provided by the U.S. Economic Development Administration

Additional copies of this report may be obtained by contacting:

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## Steering Committee

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The Emerald Coast Regional Council would like to thank the following steering committee members for the input and guidance provided during the 2022-2026 major CEDS update:

- Nathan Sparks, Okaloosa County EDO
- Danita Andrews, Florida West EDA
- Ted Everett, Washington County EDO
- Verdell Hawkins, Florida Power & Light
- Nicole Gislason, UWF Haas Center
- Shane Chadwick, Florida's Great Northwest
- Rebecca Ferguson, Port of Pensacola

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## List of Acronyms

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AFB	Air Force Base	PWEAA	Public Works and Economic Adjustment Assistance
ATMS	Advanced Traffic Management Systems	TPO	Transportation Planning Organization
BEA	Bureau of Economic Analysis	REEF	Research Engineering & Education Facility
BLS	Bureau of Labor Statistics	RRTP	Rural Regional Transportation Plan
EC-ARC	Emerald Coast Area Resilience Collaborative	SIS	Strategic Intermodal Systems
ECRC	Emerald Coast Regional Council	STEM	Science, Technology, Engineering, and Mathematics
EDA	Economic Development Administration	UF	University of Florida
EDD	Economic Development District	UWF	University of West Florida
EDO	Economic Development Organization		
FDOT	Florida Department of Transportation		
FL-AL	Florida-Alabama		
FSU	Florida State University		
GCSC	Gulf Coast State College		
ITS	Intelligent Transportation Systems		
LEPC	Local Emergency Planning Committee		
MGD	Millions of Gallons per Day		
MIRR	Military Installation Resilience Review		
MPOAC	Metropolitan Planning Organization Advisory Council		
MSA	Metropolitan Statistical Area		
NOAA	National Oceanic and Atmospheric Administration		
NSF	National Science Foundation		
NWFSC	Northwest Florida State College		

## Executive Summary

Since 1964, the Emerald Coast Regional Council (ECRC) has directed planning efforts impacting activities that involve interactions crossing jurisdictional boundaries. In 1995, the ECRC, then known as the West Florida Regional Planning Council, was designated an Economic Development District (EDD) by the U.S. Department of Commerce's Economic Development Administration (EDA). To maintain the status as an EDD and continue receiving grants and technical assistance from the EDA, a Comprehensive Economic Development Strategy (CEDS) is required. This document is updated annually and undergoes major updates (rewrites) every four years to encompass new developments and strategies for the region. An effective CEDS consists of a data-driven participatory process including the multifaceted leadership of a steering committee. The CEDS is also informed by community outreach and partnerships built through the range of ECRC programming during the year. This plan is unique from other regional plans as it focuses on the specific economic conditions of the region.

**Figure 1. Emerald Coast Location**



## 2024 Annual Performance Report

This report analyzes the region's current economic conditions and serves as a progress update towards reaching the regional goals and strategies of the CEDS Implementation Action Plan. In addition, this report includes an update on Projects to Watch throughout the region

# Implementation Action Plan – 2024 Progress Report

This section evaluates progress made towards reaching the regional goals and strategies identified in the 2022-2026 Major CEDS Update. The activities outlined also include the accomplishments of regional partners.

**Goal: Support educational programs, activities, and partners which encourage development of programs and opportunities that will meet the region’s educational and workforce needs.**

Talent Supply & Education	<b>Strategy 1. Assist partners throughout the region in maintaining and creating specialized educational programs and training to meet the region’s ever changing business needs.</b>
	Action 1.1. Use the role of ECRC to coordinate leverage grant and low interest loan funding to support an education system responsive to business needs.

## Implementation Progress:

- Pensacola State College has been awarded nearly \$2.5 million in Community Development Block Grant – Disaster Recovery funds to bolster construction trades employment in Hurricane Sally-impacted communities. Pensacola State College, George Stone Technical College, CareerSource Escarosa and Habitat for Humanity will collaborate to train low- to moderate-income residents in the carpentry, electrical, HVAC (heating, ventilation, and air conditioning), masonry, plumbing, and welding trades.
- Pensacola State College was also awarded a \$4.4 million grant from the State’s Job Growth Fund to establish a new Airframe and Powerplant Mechanics program. This project will support the construction of a new hanger, training equipment, and operating costs for the education program which will be located at the Pensacola Airport.
- Triumph Gulf Coast has been enlisted to assist a coalition that includes Escambia County in establishing an on-campus learning center at Pensacola State College to educate Florida workers in the advanced technology skills needed to compete in today's rapidly evolving world of manufacturing. The county's Promotion and Development Commission and FloridaWest, along with Space Florida and LIFT Technologies, "a national manufacturing innovation institute," have teamed up and are seeking \$6 million from Triumph to supplement private and public funding for a projected \$21 million to \$31 million endeavor. They want to build a nearly 39,000-square-foot building on the campus to house offices and research and development activities conducted by LIFT Technologies. It is projected the center will create 36 new jobs paying on average \$113,000 a year.



- Northwest Florida State College (NWFSC) will introduce three new workforce programs; Nursing Assistant, Phlebotomy, and a cutting-edge Information Technology program with a specialization in Artificial Intelligence (AI). These programs have been developed in direct response to the needs of industry partners.
- Florida State University (FSU) and five Northwest Florida state colleges are joining forces to provide educational support for projected growth in high-tech industries including aerospace, additive and advanced manufacturing, and health care.

Representatives from FSU, Tallahassee Community College, Gulf Coast State College, Chipola College, Northwest Florida State College, and Pensacola State College gathered at the NWFSC Aviation Center of Excellence in Crestview to sign the memorandum of understanding on Monday, March 25. The signing was followed by a brief tour of the facility.

One of the projects on the horizon would build aerospace and advanced manufacturing facilities in Panama City and include operations within or near the Northwest Florida Beaches Airport. The Triumph Gulf Coast Board voted in November 2023 in favor of the proposed \$98.4 million Florida State University project, also known as the Institute for Strategic Partnerships, Innovation, Research, and Education (InSPIRE). The project also includes funds to grow the number of engineering graduates in Panama City, with dollars dedicated to STEM outreach activities in the eight-county area served by Triumph.

- The University of West Florida Center for Cybersecurity received an \$8.3 million grant to launch the UWF Florida Cybersecurity Training Program to provide free cybersecurity training for state and local government personnel.
- In 2024, Gulf Coast State College (GCSC) was designated as the first State College in Florida to earn designation as a Purple Star Campus by the Florida Legislature. A purple star designation shows a commitment to military service members and their families. GCSC met all criteria outlined by the Florida Legislature including having a military webpage, a student-led transition program, and priority registration for military students and families. Also, in May of 2024, GCSC received \$24.3 million in grant funding from Triumph Gulf Coast to expand nursing, health science, and public safety programs. Funding will facilitate a simulation center on the Gulf Coast's Panama City campus that will feature state-of-the-art technology and virtual reality training. The new facility will increase the capacity of Gulf Coast's nursing, health sciences, and public safety programs, addressing a critical need for healthcare professionals and first responders.
- The Santa Rosa School District received a \$9 million Triumph Gulf Coast grant and a \$500,000 allocation from Governor DeSantis and the Florida Legislature for the development of the Santa Rosa Center for Innovation to be located in Milton. It is scheduled to open in the 2025-2026 school year.

In August of 2024, the school district also received a designation from Space Florida as a Space Florida Academy School District. This designation indicates to aerospace employers and related industries that school districts are committed to generating qualified talent



through career and technical education (CTE) offerings that lead to in-demand careers in the space industry. These certifications will prepare students for high-skill, high-wage, and in-demand occupations within the space industry.

**Goal: Encourage innovation and foster robust entrepreneurial ecosystems to drive economic growth.**

<b>Innovation &amp; Entrepreneurship</b>	<b>Strategy 1. Develop the region’s entrepreneurial hubs and connect them with industry clusters, assets, services, networks, facilities, tools, and expertise in order to facilitate business creation and retention.</b>
	Action 1.1. Leverage federal grant and low interest loan funding to introduce more capital into the entrepreneurial landscape and assist small businesses.

**Implementation Progress:**

- ECRC initiated conversations with the Small Business Development Center to gauge interest and need of a small business revolving loan fund.

**Goal: Ensure the Emerald Coast’s Economic Infrastructure is state of the art and connects communities in every part of the region.**

Infrastructure & Growth Leadership	<b>Strategy 1. Plan, advocate for, and create a modern infrastructure network to support a competitive economy.</b>
	Action 1.1. Use the role of ECRC to coordinate prioritization of regional transportation projects across jurisdictional boundaries.
	Action 1.2. Address congestion and commuter issues along major corridors such as US 98 and CR 30A through planning solutions and emerging technologies.
	Action 1.3. Develop and implement a rural regional transportation planning process for the area outside the Transportation Planning Organization boundaries to identify and prioritize projects based on local needs and a cost feasible plan.
	Action 1.4. Close the digital divide by investing in construction of fiber and wireless broadband for business retention and attraction.
	<b>Strategy 2. Promote a regional approach to the multi-modal transportation system for people, goods, and services.</b>
	Action 2.1. Coordinate and implement the design/build of a regional Advanced Traffic Management System (ATMS) and Intelligent Transportation Systems (ITS) improvements that create a connected, computerized system that improves safety, mitigates congestion, and improves regional growth adaptability.
	Action 2.2. Coordinate TPO freight committees and pursue a regional freight plan to identify and resolve issues related to mobility and movement of goods and services.
	Action 2.3. Correct current deficiencies and create a more balanced transportation portfolio with a focus on bicycle and pedestrian infrastructure related policies, roadway design standards, and funding mechanisms.

## Implementation Progress:

Our commitment to modernizing the region's infrastructure network continues to be a priority. As the coordinator of the region's three Transportation Planning Organizations (TPOs), ECRC has successfully facilitated the prioritization of regional transportation projects across jurisdictional boundaries. This year, each TPO adopted its Project Priorities in June, including key regional routes such as US 98 and I-10 for the Florida-Alabama and Okaloosa-Walton TPOs, and SR 20, US 98, and US 231 for the Bay County TPO. These priorities were established through extensive public outreach and workshops involving the TPO and Advisory Committees.

To address congestion and commuter issues, significant projects have been advanced along major corridors. Notable priorities include the multimodal overpass installation over US 98 in Gulf Breeze and ongoing US 98 capacity improvements prioritized across all three TPOs. The Brooks Bridge Replacement project in Okaloosa County will add lanes to reduce congestion, while the Around the Mound project in Fort Walton Beach and the Destin Crosstown Connector aim to alleviate congestion on US 98. Additionally, construction is underway for a pedestrian underpass at US 98 and CR 30A in Rosemary Beach, and Bay Parkway Phase III in Panama City Beach is being planned to reduce congestion on US 98. Hurlburt Field personnel have also engaged with the Florida-Alabama and Okaloosa-Walton TPOs to address congestion on US 98 due to its impact on mission readiness.

Advanced Traffic Management Systems (ATMS) and Intelligent Transportation Systems (ITS) operations and maintenance continue to be the #1 Non-SIS priority for each TPO. ECRC, along with the TPOs, is pursuing multiple planning efforts (Safety Action Plan and Smart Regions Master Plan) to identify the high injury network and the ITS technology that could be deployed to reduce fatalities and serious injuries. The Florida-Alabama TPO is also supplementing these efforts with their own Data Analytics Plan and Carbon Reduction Strategy to help support the upcoming Regional Transportation Management Center and decrease congestion.

Most recently, the ECRC was awarded a \$10 million demonstration grant from the Department of Transportation under the Safe Streets for All Program to deploy innovative technological improvements and evaluate the safety impact of ITS improvements on two of Pensacola's highest crash rate segments, Fairfield Drive and Pensacola Boulevard, for the prevention of deaths and serious injuries.

The ECRC is advancing regional freight initiatives by coordinating TPO freight committees and identifying priorities through the MPOAC Freight and Rail Committee, with plans to include a comprehensive Regional Freight Plan in future work programs. These efforts aim to address mobility challenges and enhance the movement of goods and services across the region, supporting economic growth and connectivity. Beyond the boundaries of our three TPOs, the development and implementation of a Rural Regional Transportation Planning (RRTP) process has been instrumental in identifying and prioritizing projects based on local needs from communities that have not traditionally been a direct part of the FDOT planning process. This effort ensures that transportation infrastructure extends beyond urban areas, benefiting communities in every part of the region. The plan establishes a priority transportation improvement list for the region's rural areas similar to the TPOs. In 2024, the RRTP adopted an updated list of the top ten (10) project priorities and continues the collaborative effort to plan transportation

infrastructure beyond the urban boundaries. Projects identified to receive funding are a multi-use trail along US 90 within the Holt community, the resurfacing of County Road 1883 in Walton County, and a resurfacing and safety project on US 29 in Escambia County.

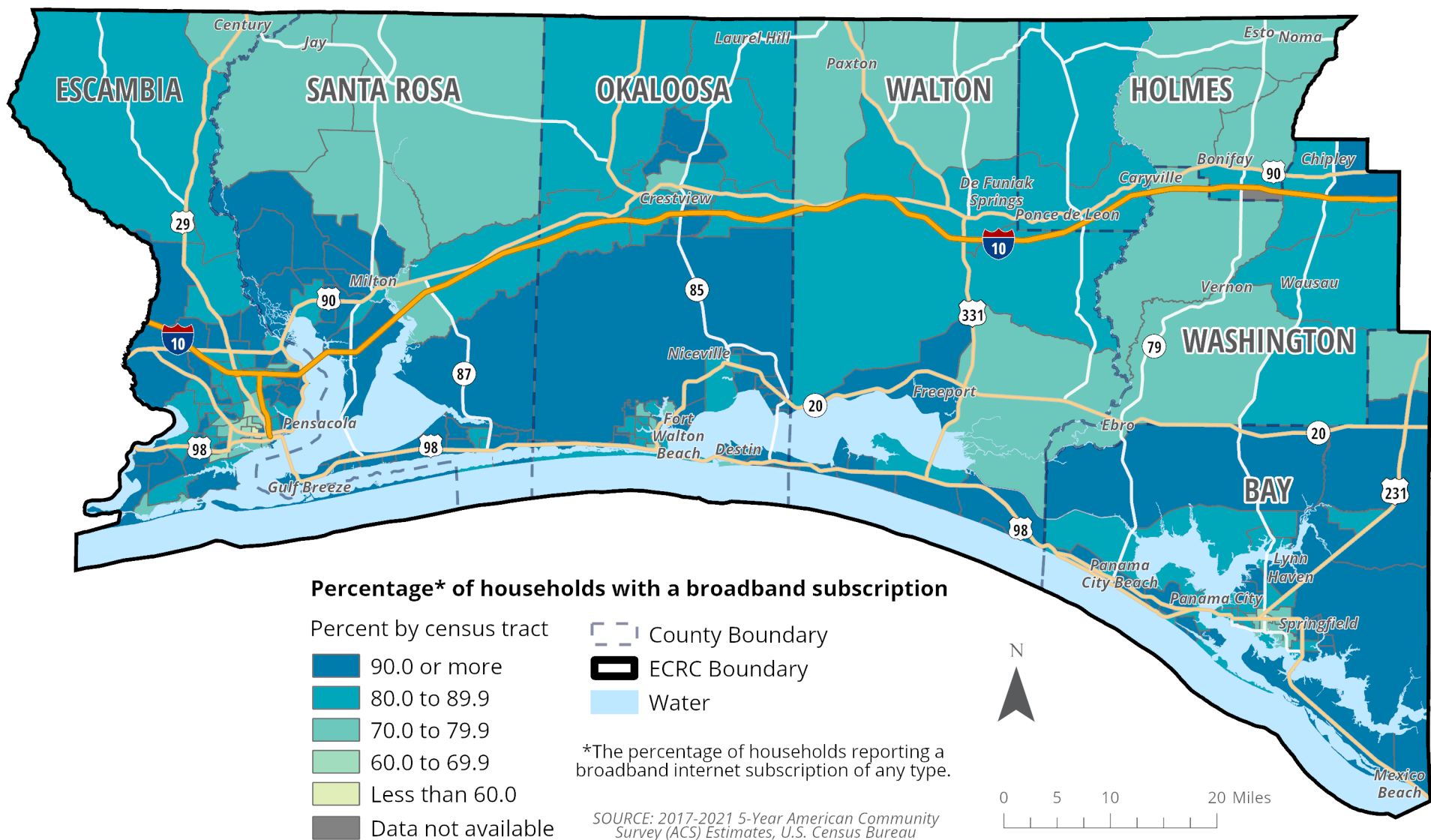
The “Seven Layer Cake” initiative is a comprehensive approach by ECRC to transform the region's infrastructure into a state-of-the-art, connected system that supports Vision Zero and smart city initiatives. This multi-phase project focuses on integrating advanced technology across key areas, including the deployment of fiber optic cabling along high-fatality corridors, the development of a regional ATMS, and the establishment of a Regional Traffic Management Center for the Florida-Alabama TPO, which will be the most technologically advanced facility in Northwest Florida. The initiative supports the goals of reducing congestion, enhancing safety, and promoting multimodal transportation options, aligning with the broader objectives of creating a modern infrastructure network that connects communities and supports economic growth. By prioritizing technology advancements and data analytics, the Seven Layer Cake initiative aims to deliver sustainable and resilient infrastructure improvements that benefit the entire ECRC region.

To improve multimodal transportation options across our region, ECRC has been actively working on policies, roadway design standards, and funding mechanisms that prioritize bicycle and pedestrian infrastructure. The primary projects in this area include support for the ECRC Regional Pedestrian and Bicycle Committee, the administration of the region-wide Safe Streets for All grant, and the adoption of the 2023/2024 Florida-Alabama TPO Bicycle, Pedestrian, and Trail Plan. Late in 2024, the Bay County TPO Bicycle, Pedestrian, and Trail Master Plan will kick off. These efforts align with goals to promote sustainable and accessible transportation options.

ECRC presented two trail corridors on the Florida Greenways and Trails Priority Trail system to the Florida Greenways and Trails Council in the Spring of 2024. The first corridor is the Great Northwest Coast Connector, about 307 miles long, extending from Escambia County through Franklin County. The second corridor is the US 90 Trail Corridor, about 429 miles long and extending from Escambia County through Duval County, with about 118 miles in our region. The inclusion of these two corridors on the priority corridor system increases funding and grant opportunities through the SUN Trail program.

In our pursuit to close the digital divide, ECRC facilitated meetings and coordination with local governments in our region. There have been substantial investments in the construction of fiber and wireless broadband infrastructure (Refer to Figure 1). These projects are crucial for business retention and attraction, as they enhance our region's connectivity and digital capabilities. A key achievement is the funding secured for the Town of Jay and unincorporated Santa Rosa County, which received \$2,363,937 to deploy 103.7 miles of new fiber optic cable, providing Fiber to the Home (FTTH) services to 791 unserved locations with download speeds of 300 Mbps and upload speeds of 10 Mbps.

Figure 1 - Regional Broadband Access



**Goal: Bolster the Emerald Coast economy by recruiting new businesses and promoting the expansion of existing businesses.**

<b>Business Climate &amp; Competitiveness</b>	<b>Strategy 1. Encourage the development and growth of small businesses in rural and underserved communities.</b>
	Action 1.1. Research capital seed funding.
	Action 1.2. Serve as a resource partner to local Economic Development Organizations.
	<b>Strategy 2. Coordinate planning efforts with assistance for regional key industry clusters and supply chains.</b>
	Action 2.1. Promote North Florida Manufacturing, Logistics, and Distribution Corridors through the platform of the TPO freight groups.
	Action 2.2. Use representation on the Florida Freight Committee to advocate funding for regional supply chain projects and promote significance of regional infrastructure for inclusion in national highway freight network.
	<b>Strategy 3. Address site development to accommodate business expansions and relocations.</b>
	Action 3.1. Conduct regional assessments of specific commercial and industrial-use accommodations in new and existing business parks.
	Action 3.2. Strengthen the role and presence of ECRC within local economic development organizations.
	Action 3.3. Research shared revenue models for business site development.

### **Implementation Progress:**

As a resource partner, ECRC has assisted EDOs in grant writing and management, enabling them to secure critical funding for business development. Notably, ECRC supported Santa Rosa County in their Defense Community Infrastructure Program (DCIP), and Economic Development Administration (EDA) Public Works and Economic Adjustment Assistance (PWEAA) grant applications. The DCIP grant will assist in the construction of a through-the-fence taxiway that will connect Naval Air Station (NAS) Whiting Field with the new Whiting Aviation Park. The EDA PWEAA grant would have assisted with a new fire suppression system to a new hangar at Whiting Aviation Park. These strategic initiatives enhance the region's appeal for aviation-related commercial and industrial development, leveraging a limited-access use agreement with NAS Whiting Field to provide civilian tenants with access to military runway facilities, significantly boosting the region's aviation and defense capabilities.

Additionally, ECRC played a key role in assisting FloridaWest with the development of a Foreign Trade Zone (FTZ) map, expanding the zone to include Escambia, Santa Rosa, and Okaloosa Counties. This expansion, approved by the Foreign-Trade Zones Board, aims to expedite and



encourage foreign commerce by reclassifying existing sites and adding new usage-driven sites within the zone. This reorganization supports the region's economic growth by making it more attractive to international trade and investment.

Through representation on the Florida Freight Committee, ECRC continues to advocate for funding and prioritization of regional supply chain projects, highlighting the importance of regional infrastructure for inclusion in the national highway freight network. These efforts are critical in positioning the Emerald Coast as a competitive hub for manufacturing, logistics, and distribution.

## Goal: Support high quality governance to sustain Florida’s economic and quality of life expectations.

Civic & Governance Systems	<b>Strategy 1. Balance resources through sound management of physical development.</b>
	Action 1.1. Coordinate economic development efforts with related land use planning for consistency among government departments.
	<b>Strategy 2. Strengthen partnerships with local governments, agencies, and non-profits by identifying opportunities for joint projects.</b>
	Action 2.1. Conduct workshops and roundtables on planning policies and procedures, economic development tools, and available funding programs.
	<b>Strategy 3. Create a culture of informed civic engagement and participation.</b>
	Action 3.1. Support early and continuous public involvement in development and implementation of plans and decision-making process through modern yet accessible methods.
	Action 3.2. Ensure equitable representation from small business owners, special populations, and traditionally underserved populations by creating outreach methods tailored to the audience.

### Implementation Progress:

ECRC continues to play a critical role in coordinating regional planning and governance efforts, enhancing resource management and promoting sound development practices. We provide day-to-day planning and permitting support to the Town of Century, along with reviewing major comprehensive plan amendments from regional governments. Our recently completed Military Installation Resilience Review (MIRR) assessed the infrastructure supporting six major military installations across five counties, creating a comprehensive list of regional projects that bolster resilience and military readiness. This initiative also involves developing Intergovernmental Support Agreements (IGSAs), which allow local governments and their contractors to directly provide services to military installations, potentially saving millions annually and generating additional non-tax revenue for local governments.

Our engagement extends to environmental stewardship, as we participate in regional estuary programs, including the Pensacola and Perdido Bay Estuary Program, where we serve on the Technical Advisory Committee for the regional vulnerability assessment, and the St. Andrews and St. Joseph Bay Estuary Program, where ECRC has a seat on the management council, which assisted in the adoption of the program’s first Comprehensive Conservation and Management Plan in the summer of 2024. ECRC has also facilitated vulnerability assessments for six communities—Century, Chipley, Ebro, Vernon, Caryville, and Wausau—helping them comply with the Resilient Florida program requirements. These assessments have enabled the creation of future flooding models and mapping of critical municipal assets, guiding priority-setting for

future resilience efforts.

Additionally, ECRC has embarked on new planning initiatives, including the City of Mary Esther's Comprehensive Plan Update and a cross-jurisdictional Analysis of Impediments to Fair Housing for Escambia and Santa Rosa Counties, which aims to improve housing access by evaluating local programs, regulations, and ordinances. Our collaborative efforts with the Florida Housing Coalition and Texas A&M Extension Community Watershed Partners also led to a Resilient and Affordable Housing Workshop in Bay County, which brought together military, county, and city leaders to explore strategies for balancing workforce housing needs.

**Goal: Promote regional understanding of resilience and sustainability efforts and integrate the experience of advocates and practitioners into future planning endeavors.**

Environmental Quality, Protection, & Resilience	<b>Strategy 1. Assist regional communities' disaster resilience efforts through targeted capacity building.</b>
	Action 1.1. Conduct workshops on environmental resilience planning that help create the connection between land use strategies, smart design, and economic impact.
	Action 1.2. Coordinate the Local Emergency Planning Committee and facilitate exercise drills for government entities such as health departments and airports.
	Action 1.3. Provide technical assistance to local jurisdictions on coastal management strategies.
	Action 1.4. Head up and coordinate a regional resilience collaborative to address regional resilience issues.
	<b>Strategy 2. Support restoration and utilization of regional waterways and greenways as a stimulant for economic growth and improved quality of life.</b>
	Action 2.1. Work with local governments and nonprofits to plan for greenway trails and connectivity.
	Action 2.2. Work to improve and protect waterways through coordination of coalitions and planning efforts
	Action 2.3. Plan and implement environmental education programs and events.
	<b>Strategy 3. Support and promote the growth of resilience initiatives and projects within the region.</b>
	Action 3.1 Create an annual Action Plan to plan for and implement resilience projects and initiatives in the region through the EC-ARC.
	Action 3.2 Host an online forum to harbor information on resilience projects and initiatives in the region.

### Implementation Progress:

ECRC leads efforts to enhance regional resilience through targeted capacity building and effective coordination with local entities. In line with our commitment to disaster resilience and pursuant to the Emergency Planning and Community Right-To-Know Act, we coordinate the Local Emergency Planning Committee (LEPC). The LEPC is responsible for developing the regional hazardous materials emergency response plan, maintaining a repository of hazardous materials information, and conducting outreach to raise awareness. Comprising local professionals from fields such as firefighting, law enforcement, emergency management, environmental protection, health, transportation, and industrial compliance and safety, the LEPC works together to mitigate the effects of hazardous material releases by collecting data on the storage of

chemicals above specified quantities. Additionally, we coordinate critical exercise drills for government entities which are essential for preparing our region to respond effectively to hazardous material emergencies and strengthening overall regional preparedness.

The establishment of the Emerald Coast Area Resilience Collaborative (EC-ARC) has brought together a diverse group of stakeholders to address resilience issues effectively. In 2024, Okaloosa County signed a Memorandum of Understanding (MOU) formalizing their participation, enhancing the collaborative's capacity to integrate varied perspectives into resilience planning and actions. Additionally, ECRC anticipates the development of an annual Action Plan through the EC-ARC, which systematically identifies and implements resilience projects across the region, ensuring a structured and coordinated approach to enhancing resilience.

ECRC has also played a pivotal role in the Military Installation Resilience Review (MIRR), which analyzed and assessed public infrastructure that supports six major military installations across five counties. This review included examining regional infrastructure that directly or indirectly supports these bases and the communities where military members and families live. As a result, ECRC developed a region-wide list of infrastructure projects designed to enhance regional resilience and military readiness. ECRC and the military installations are working on developing Intergovernmental Support Agreements (IGSAs), which will allow local governments to directly provide services to the installations, potentially saving millions of dollars annually while generating additional non-tax revenue for local governments.

One of the key adaptation strategies emerging from the MIRR focuses on coastal resilience, particularly around NAS Pensacola and along US 98. Okaloosa County Coastal Resources recently submitted a pre-proposal to the National Fish and Wildlife Foundation's 2024 National Coastal Resilience Fund for site assessment and initial design of a large-scale living shoreline alongside Highway 98 on Okaloosa Island. The project aims to protect the coastline and enhance community and military resilience, and the County has been invited to submit a full proposal. This initiative underscores the importance of integrating resilience into regional planning efforts, particularly in areas critical to both community and military operations.

In support of environmental restoration and sustainable economic growth, ECRC has collaborated with local governments and nonprofits to plan for greenway trails and connectivity. Our efforts include assisting local governments in obtaining funding for the SUN Trail network, targeting gaps within our region to promote healthier, more vibrant communities. We also played a key role in the Technical Advisory Committee for the Escambia/Santa Rosa 2040 Plan, a joint effort by 1000 Friends of Florida and the University of Florida Center for Landscape and Conservation Planning. This plan explored scenarios for future growth in Escambia and Santa Rosa counties, highlighting the importance of sustainable land use patterns to protect water quality and improve community outcomes.

ECRC also contributes to the Pensacola and Perdido Bay Estuary Program's Vulnerability Assessment Technical Advisory Committee, where we provide expertise in evaluating regional vulnerabilities to environmental hazards. Our involvement helps ensure that resilience strategies are well-informed and tailored to the specific needs of the local communities.

Furthermore, ECRC's coordination of coalitions and planning initiatives has contributed to the improvement and protection of our waterways, notably through support for the future North Santa Rosa Regional Water Reclamation facility. We have also represented regional projects,

such as the Great Northwest Coast Connector and the US 90 Trail Corridor at the Florida Greenways and Trails Council, advocating for the integration of greenway and trail development as key components of regional resilience and connectivity.

To support resilience and mitigate environmental risks, ECRC has conducted comprehensive Vulnerability Assessments for the Town of Century and all municipalities in Washington County. These assessments utilized predictive flood models and asset data provided by the Florida Department of Environmental Protection (FDEP) to identify critical assets at risk from potential 100- and 500-year flood events. The insights gained from these assessments are instrumental in guiding future resilience planning and in securing potential Resilient Florida grant funding for at-risk communities.

As a regional entity, ECRC maintains a seat on the St. Andrews and St. Joseph Bay Estuary Program Management Council, which in the summer of 2024 adopted the first Comprehensive Conservation and Management Plan for St. Andrew Bay Watershed. The Council is in the next phase of project implementation through grant awards and educational programs which foster the protection and improvement of the watershed and in return maintains and supports ecotourism that plays a significant role in the region's economy.

One of the major grants St. Andrews and St. Joseph Bay's Estuary Program is hoping to receive is a \$677,000 NOAA grant to reduce pollution of local waterways. The funding would fund the installation of 60 Enviropod LittaTraps in stormwater drains to catch debris, which would help local governments maintain their stormwater systems, by reducing clogs caused by debris that contribute to localized flooding. If awarded, this grant would improve flooding conditions across Bay County.

**Goal: Support the creation and maintenance of a diversity of housing options to support a competitive workforce and high quality of life.**

Housing	<b>Strategy 1. Encourage and implement programs that support development of a range of housing options to meet regional demand.</b>
	Action 1.1 Perform housing research, support planning efforts, provide grant writing and technical assistance.
	<b>Strategy 2. Develop a toolkit for local governments to understand the range of options to improve housing access, affordability, and accessibility.</b>
	Action 2.1 Develop and share a toolkit highlighting options to improve housing for the region’s local governments.

**Implementation Progress:**

We conducted a comprehensive housing study for Bay County, providing valuable insights and data to inform housing development efforts. This research has been instrumental in identifying specific housing needs and trends within the region.

As part of the wider Military Installation Resilience Review (MIRR) process, we are developing and sharing a toolkit that highlights a range of options for local governments to enhance housing in the region. This toolkit will serve as a valuable resource, offering practical solutions and strategies for addressing housing challenges. This initiative aligns with the MIRR’s goal to ensure that our communities are able to provide quality housing for our military service members, civilian staff, and contractors.

ECRC Staff continues to administer the State Housing Initiatives Partnership (SHIP) housing programs for the counties of Walton, Holmes, and Washington. In addition, Staff successfully closed out the Hurricane Housing Recovery Program (HHRP) grant program for the counties of Holmes and Washington.



## Projects to Watch – 2024 Update

### Okaloosa County

**Shoal River Ranch Gigasite:** This is a 10,500-acre industrial park located at I-10 and U.S. Highway 90 being positioned for large scale economic development. The upcoming phase of the project will involve securing funding for intersection improvements and road construction. To accommodate continued residential, commercial, and industrial growth, the Okaloosa County Board of County Commissioners is actively working to site, permit, fund, and construct a brand new 1.5 MGD (Phase 1) wastewater treatment plant at the Shoal River Ranch Gigasite. At present, the target completion date for the project is December 2026.

**Central Moloney Inc:** This electric transformer manufacturer will be constructing a \$50M, 300,000 ft<sup>2</sup> production facility on a 48-acre parcel located within the Shoal River Ranch Gigasite. The project will take three years to design, permit, and construct, and is expected to employ 350 at full build out.

**Project Sound:** A defense contractor supporting the U.S. Navy by designing, engineering, and manufacturing integrated systems, weapons sensors, and training / support systems, has shortlisted Okaloosa County's Industrial Air Park for a \$15M High Volume Manufacturing facility that will employ 140+. A site selection decision is expected in early Q1 2024.

**Bob Sikes Airport:** Consideration is being placed on locating a manufacturing facility on a 20-acre parcel east of the runway. This project would require utility extensions, taxiway and apron construction, road extensions, and parking construction.

**County / Federal Housing Partnership:** The Okaloosa County Board of County Commissioners and Eglin Air Force Base are currently in the exploratory stages of a partnership that would result in the development of a mixed-used attainable housing community for military members and civilians alike. As envisioned, the project would be located on a 200-acre portion of the former north nine holes of Eglin Golf Club, just west of Northwest Florida State College on College Boulevard.



***Public Workshop on Corridor Improvements in Santa Rosa County***

***SOURCE: ECRC***

**Futures Park/PARRCS:** A potential park project has been conceptualized for an 80-acre Enhanced Use Lease opportunity on federal land. This project is envisioned as a research and development-oriented park near Eglin's AFB's west gate and directly adjacent to University of Florida's Research Engineering & Education Facility (UF REEF).

**Fort Walton Beach Commerce & Technology Park:** This project is a 300-acre park with a wide range of tenants such as Boeing and Lockheed Martin, which has recently undergone a comprehensive master planning process. The Master Plan proposes several transportation improvements.

**Holt Industrial Park:** This is a small, industrial enclave located on I-10. Businesses located there are currently on septic and sewer situated 12 miles away.

## Escambia County

**OLF-8:** This is Escambia County's proposed 500-acre mixed-use commerce park located adjacent to Navy Federal Credit Union off I-10. The Master Plan includes residential, retail, public amenities, office, commercial, and light industrial uses. The County is currently seeking a buyer to purchase and develop the property.

**The Bluffs:** The Bluffs is Northwest Florida's Energy Intensive Industrial Park and is undergoing the next steps in marketing and infrastructure development.

**Co:Lab Expansion:** Escambia County and Pensacola's 22,000-square-foot business incubator and growth accelerator is undergoing expansion efforts.

**American Rescue Plan Build Back Better Regional Challenge Application:** An application is being developed to submit for the ARPA Build Back Better Regional Challenge to grow regional industry clusters around manufacturing, Department of Defense growth, and aviation-related industries. Efforts would develop new and scale existing industry clusters through planning, infrastructure, innovation and entrepreneurship, workforce development, and access to capital.

**MxD West Florida:** MxD (Manufacturing x Digital) West Florida is an effort by the University of West Florida to create a regional version of the MxD in Chicago. This facility would harness many of the natural assets in downtown Pensacola, proximity to the Port of Pensacola for blue technology development, and existing UWF infrastructure in the downtown area. The expansion/new build would allow growth of current laboratories near the port to accommodate more projects, as well as train a larger number of students downtown.

**Port of Pensacola Upgrades:** The Port of Pensacola seeks to increase the region's freight capacity, proposed improvements include: Berth #6 Rehabilitation, Internal Heavy Load Roadway and Project Cargo Working Area Reinforcement, Upland Cargo Improvements, On-Port Rail Resiliency and Efficiency Enhancement, and the construction of a Manufacturing Complex with a Dry Storage Facility, Small Boat Launch, and Marine Industry Training and Manufacturing Facility.

**American Magic:** The American Magic Sailing Team, which has been training in Pensacola since 2018, signed a renewable 10-year lease with the City of Pensacola. The Team's headquarters are being constructed at the Port of Pensacola and work is expected to be completed by December of 2025.

**LIFT:** LIFT, a national advanced materials manufacturing innovation institute, has selected Pensacola/Escambia County to establish its latest technology accelerator and talent development showcase facility. The \$21 million project is being made possible through economic development partnerships and collaboration with Pensacola-Escambia Promotion and Development Commission (PEDC), Pensacola State College (PSC), Space Florida, and Triumph Gulf Coast, to establish LIFT's 38,000-square-foot advanced manufacturing institute on the main campus at PSC. LIFT will serve as a technology accelerator and generate an estimated \$32 million in new federal and industry research. This first-of-its-kind project in Florida is focused on bridging the gap between academic manufacturing research and product commercialization to advance manufacturing technologies and will be advantageous as a unique asset for growing manufacturing in Escambia County and throughout the Northwest Florida region. Construction is anticipated to be completed by early 2026.

## Bay County

**Commerce Park:** The City of Lynn Haven is in the process of planning its third commerce park to accommodate current and future business expansion and relocation needs. The next steps of the project include identifying the ideal site and securing funding for required infrastructure.

**Port Panama City:** The Port completed construction of a new biomass dome storage facility. The facility expands the Port's storage capacity and allows its tenant Enviva to increase exports. Enviva is the world's largest producer of sustainable wood pellets. The project was made possible by a \$10 million grant from EDA. Total project costs were approximately \$16 million. ECRC Staff provided grant writing and grant management services to the Port.

The Port was awarded a \$11.2 million grant by the Department of Transportation Maritime Administration for the construction of a 200,000-square-foot warehouse at the East Terminal. This expansion will allow the Port to expand its cargo operations and is estimated to create 337 jobs (140 direct, 134 induced, and 63 indirect). ECRC is providing grant administration services.

## Santa Rosa County

**Whiting Aviation Park:** Whiting Aviation Park is a 239-acre commercial/industrial park adjacent to Naval Air Station Whiting Field in Northwest Florida. Through a limited-access use agreement between Santa Rosa County and the United States Navy, civilian tenants of the Aviation Park will be able to use the Navy's airfield facilities. The agreement allows up to 75 operations by civil aircraft per day with access to two active bi-directional runways. The Navy provides runway access and monitors airspace.

Leonardo Helicopter is constructing a new 123,000 sf Maintenance, Repair, and Overhaul facility. Leonardo anticipates creating 50 jobs in the Aerospace Product and Parts Manufacturing subsector, and a capital investment of \$54 million.

ECRC staff provided grant writing services to Santa Rosa County for an EDA PWEAA grant. The County received a Further Consideration letter from EDA, proposing a \$4.2 million award. However, due to timing concerns the County withdrew its application.

**North Santa Rosa Water Reclamation Facility:** This new advanced wastewater treatment facility will allow the City to stop using its current plant which is at capacity and discharges directly into the Blackwater River. The new plant will increase resilience and expand capacity to accommodate the growth of North Santa Rosa County. The City continues to seek funding for the various phases of the project.

**Northwest Florida Industrial Park @ I-10:** The buildout of and development of the Northwest Florida Industrial Park @ I-10 is nearing completion. Only six acres of property remain available.

## Walton County

**North Walton Rural Hospital:** A former hospital building may be purchased and reopened. This will allow for planned emergency care services, laboratory services, radiology services, surgical services, and 10 inpatient rooms.

**Potential New Land for Development:** A 100-acre parcel of land located at the northwest corner of I-10 and U.S. 331 was purchased by two companies in hopes of selling the unused portions to developers. This could result in nearly 80-acres of developable land ready for business expansion or the recruitment of new firms to the area.

**DeFuniak Springs Airport Expansion:** the City of DeFuniak Springs received a \$3 million grant from the Florida Department of Commerce's Job Growth Fund to aid in the construction of two 6,400-square-foot hangers, one 10,000-square-foot hanger, a taxiway, an access road, and associated utilities. This infrastructure will allow the airport to attract new innovative employers in aerospace and defense, including Advanced Air Mobility (AAM). The project will create 500 jobs and have a total estimated fiscal impact of more than \$12.3 million.

## Washington County

**Sunny Hills Infrastructure Expansion:** Washington County is planning a \$13 million investment in water and sewer infrastructure along State Road 77 to support growth in the Sunny Hills area. The project aims to accommodate the development of new homes and attract businesses to the region. County officials are pursuing state funding to kickstart this initiative, which could significantly boost the local economy by supporting residential and commercial growth.

**Washington County Industrial Park:** The Board of County Commissioners applied for and received a \$4.9 million PWEAA grant from EDA. The funding will assist in the construction of a 400,000-square-foot manufacturing facility at the Park. Total project costs are \$8.3 million, and it is anticipated that 100 jobs will be created. The Project will leverage \$45 million in private capital investments.

## Holmes County

**Eco-Industrial Park Development:** The Holmes County Development Commission is working on a 250-acre Eco-Industrial Park. This park will focus on sustainable manufacturing, with environmentally sound practices designed to minimize impact while conserving energy and natural resources. This project aims to attract businesses committed to sustainability, creating new job opportunities and supporting the local economy.

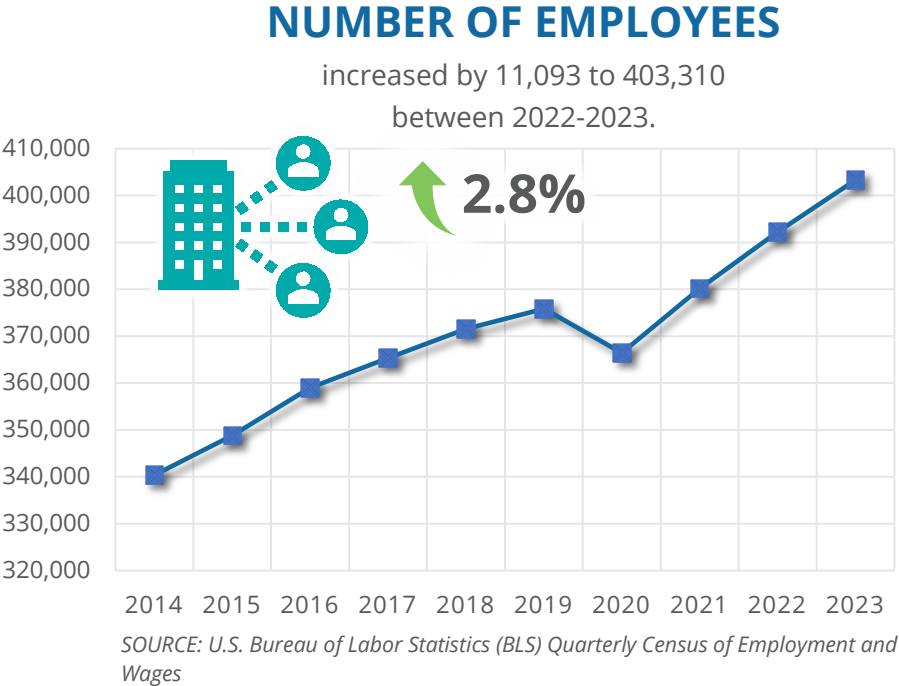
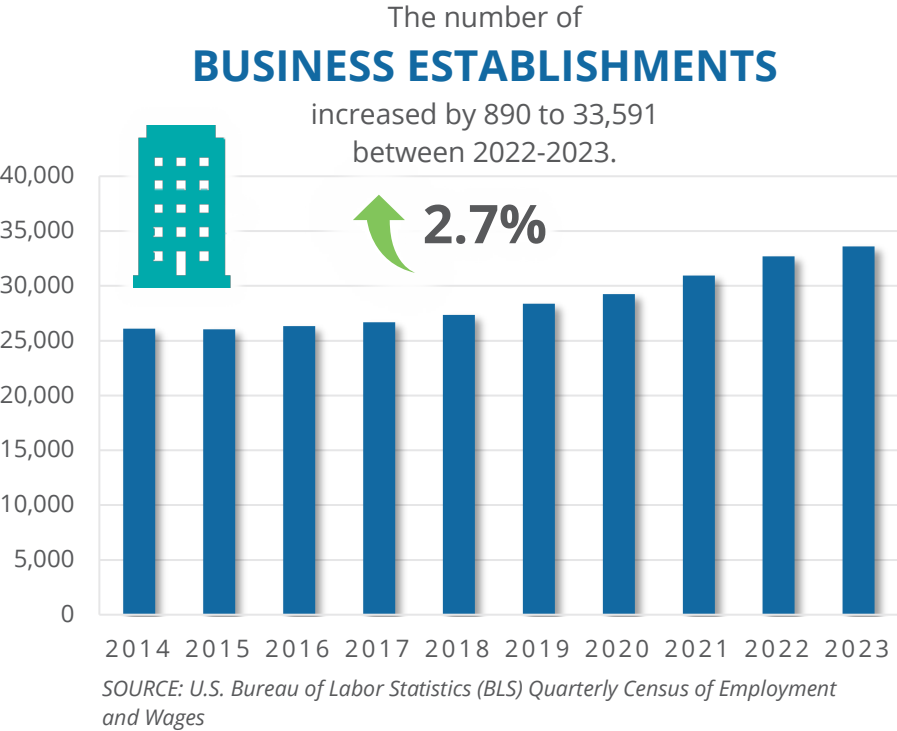
**Broadband Expansion:** Holmes County received approximately \$14.7 million through the Broadband Opportunity Grant Program to expand high-speed internet access across rural areas, including Bonifay, Westville, and Ponce de Leon. This project aims to provide fiber-to-home services, improving connectivity for homes, businesses, and farms with speeds up to 200 megabits per second.

**Infrastructure Improvements:** Holmes County and the City of Bonifay will receive approximately \$6 million for infrastructure improvements, including water and roadway upgrades and enhancements to Bonifay's wastewater treatment plant. This initiative is projected to create around 120 new jobs and attract significant capital investment, positioning the area for further economic development.

# Impact Dashboard

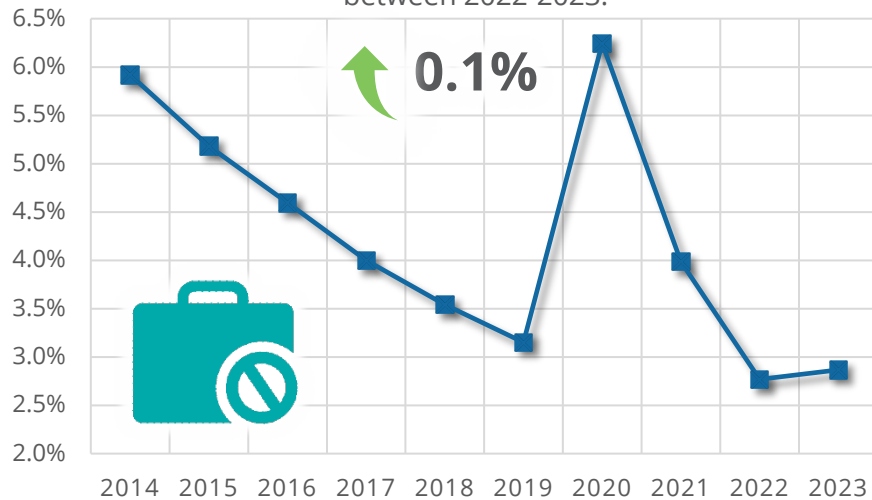
The success of desired outcomes is tracked through monitoring specific metrics that reflect the outlook of the region. The following charts show data trends over the past ten years and highlight the past year's growth or decline. At the time of this update, the most recent Bureau of Labor Statistics (BLS) annualized data was for 2023, while the Bureau of Economic Analysis (BEA) annualized data was for 2022.

Unless otherwise noted, the data shown is for the entire Emerald Coast Region.



## UNEMPLOYMENT RATE

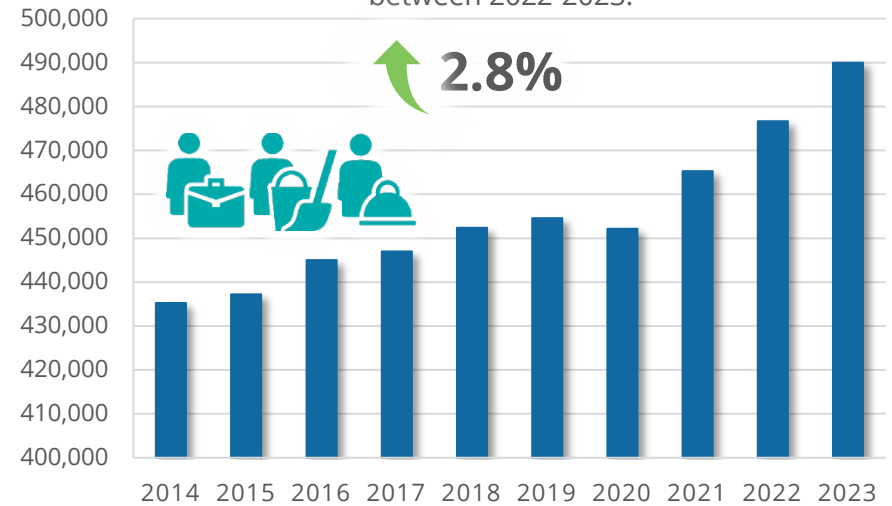
increased by 0.1% to 2.9%  
between 2022-2023.



SOURCE: U.S. Bureau of Labor Statistics (BLS)

## LABOR FORCE

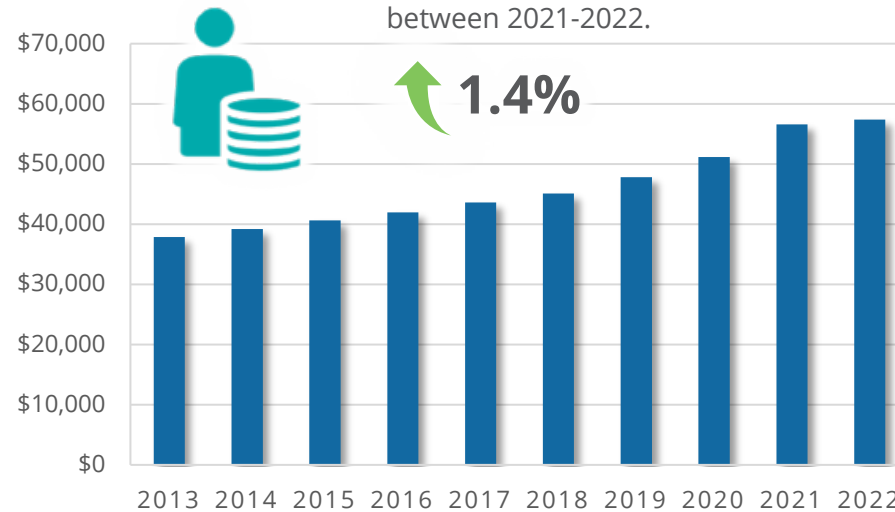
increased by 13,338 to 489,945  
between 2022-2023.



SOURCE: U.S. Bureau of Labor Statistics (BLS)

## PER CAPITA INCOME

increased by \$770 to \$57,377  
between 2021-2022.



SOURCE: U.S. Bureau of Economic Analysis (BEA)



## PENSACOLA - FERRY PASS - BRENT MSA

### REAL GDP\*

increased by \$0.4B to \$22.8B  
between 2021-2022.



SOURCE: U.S. Bureau of Economic Analysis (BEA)

## CRESTVIEW - FORT WALTON BEACH - DESTIN MSA

### REAL GDP\*

increased by \$0.5B to \$18.4B  
between 2021-2022.

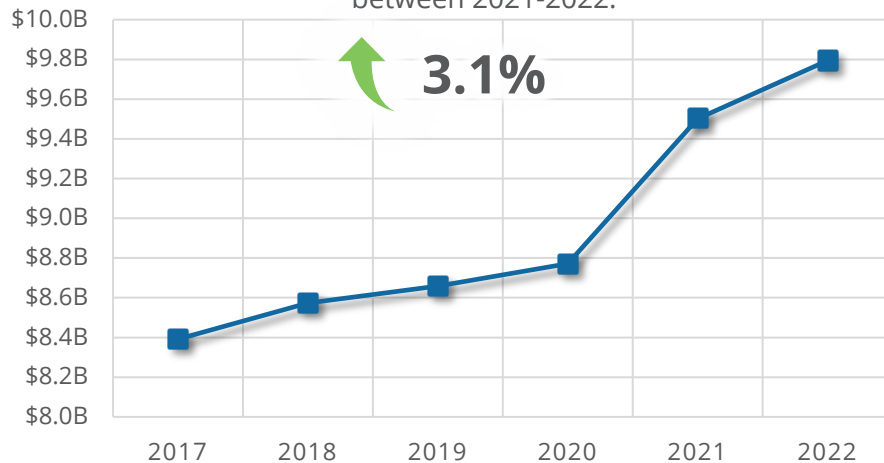


SOURCE: U.S. Bureau of Economic Analysis (BEA)

## PANAMA CITY MSA

### REAL GDP\*

increased by \$0.3B to \$9.8B  
between 2021-2022.

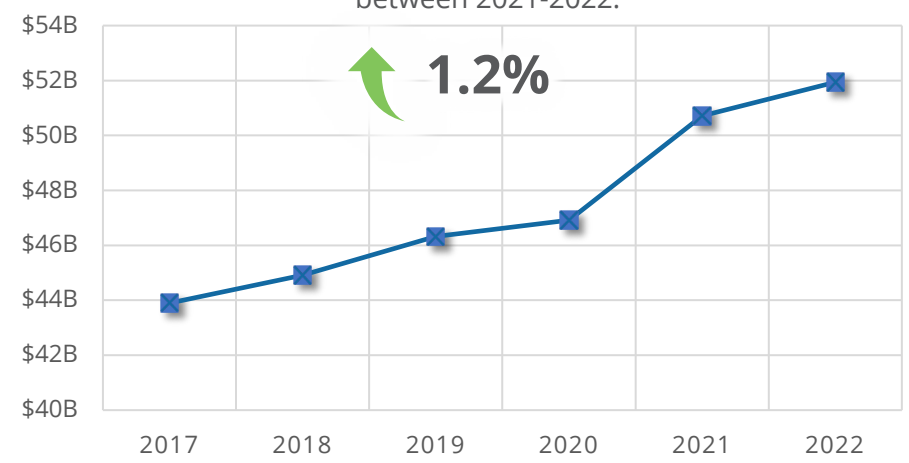


SOURCE: U.S. Bureau of Economic Analysis (BEA)

## EMERALD COAST REGION

### REAL GDP\*

increased by \$1.2B to \$51.9B  
between 2021-2022.



SOURCE: U.S. Bureau of Economic Analysis (BEA)



\*Chained 2017 dollars, all industries.