



Clearly Zephyrhills

WORKFORCE BIZWALK 2020/2021

REPORT

Zephyrhills

Assessing the Business Climate | Advancing Retention and Expansion

A report by the Greater Zephyrhills Chamber of Commerce in collaboration with the
Zephyrhills Economic Development Coalition



ZEDC Mission Statement

The Zephyrhills Economic Development Coalition seeks to stimulate economic growth, promote business diversity, and cultivate and enrich the vitality of the greater Zephyrhills community.

ZEDC Vision Statement

The ZEDC provides leadership and excellence in delivering economic development services for our clients, prospects, investors, and partners.

The 6 objectives of our economic services are:

- Market and promote the greater Zephyrhills community by conducting and providing market research and business analysis
 - Facilitate the retention and expansion of existing business and industry
 - Create opportunities for advancement and education of the workforce
 - Create a healthy environment for the growth and expansion of existing business and new development
 - Advocate for policy to attract and retain a diverse workforce
 - Secure and enhance private/public leadership and investment
-

Zephyrhills Economic Development Coalition

Partners in Zephyrhills area business and economic development



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is the PLACE for BUSINESS

Zephyrhills BizWalks 2020-21

Assessing the Business Climate | Advancing Retention and Expansion

ZECD Business Studies...the BizWalk

BizWalks are surveys of business conducted by a combination of in-person interviews and/or online surveys. The Zephyrhills Economic Development Coalition (ZEDC) first published the results of an industrial corridor BizWalk in 2014. The industrial corridor generally conforms to locations on the east and southeast side of Zephyrhills in general proximity to the Zephyrhills Municipal Airport (airport). In 2017 ZEDC published a Medical Industry Study which focused specially on the robust medical services industry in the community. The 2018-2019 BizWalks strove to update information and trends from the 2014 industrial corridor study and to document new businesses that may have located in the corridor. Our most recent study, the Workforce BizWalk utilized surveys conducted online and in-person by ZEDC volunteers and Chamber staff. A significant new use of survey data introduced with the 2018-19 study was creation of business profiles. Profile information was added to the ClearlyZephyrhills.com website so that website users can easily see what businesses are located in the corridor and what goods or services are produced by these businesses. The profiles are embedded with a map of the city showing the geographic location of each business in the study. The user only needs to mouse over the business name to bring up the profile. Profiles for businesses newly added for the 2020-2021 survey will be added to a new map. Profiles and maps from both the 2018-19 study and the 2020-2021 study will both be available on the Clearly Zephyrhills website.

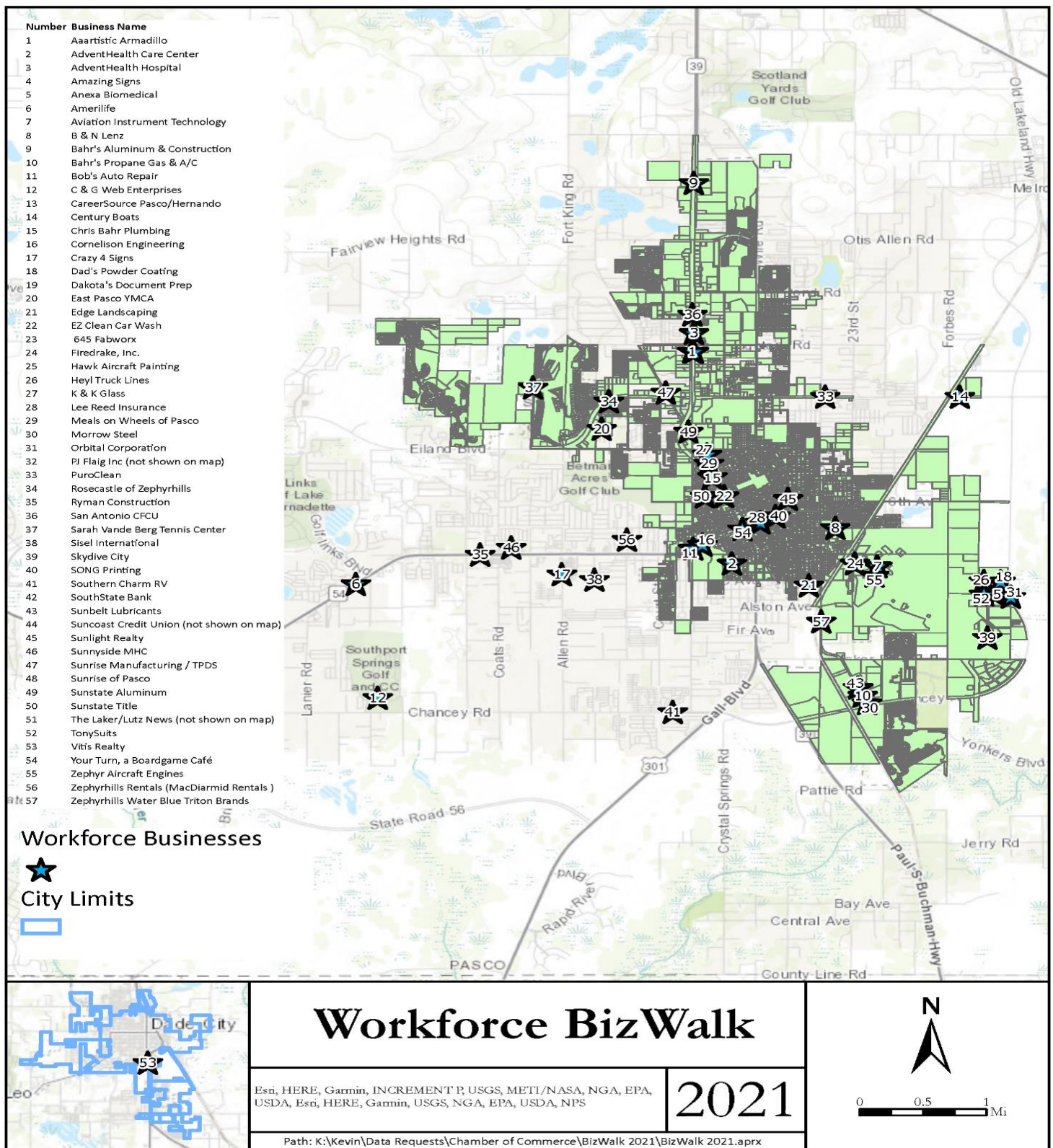
The BizWalk program was new to Zephyrhills in 2014. It was also the first locally initiated program of its kind in Pasco County. The Zephyrhills BizWalk's ultimate goal is to ensure an authentic pro-business climate that keeps the wealth and job-creating companies in town (retention) by understanding their needs and supporting their success and growth (expansion.) Such a business environment will retain those valued, existing businesses and, at the same time, create positive synergies to attract new business.

Targeted Outcomes: *Outcome 1:* Take the pulse of local business through a direct dialogue with business owners and between leaders in business and economic development; *Outcome 2:* Assess the local business climate by analyzing the new data that will help to identify and track trends, challenges, success stories, and solutions over time; *Outcome 3:* Collect and inventory facts, stories, and successes that can be used in ongoing business development and marketing strategies; *Outcome 4:* Identify key business issues for action through near and long-term business development purposes; *Outcome 5:* Develop a pro-business agenda (Program of Action) for Zephyrhills alongside a ZEDC commitment to champion programs and initiatives in favor of business and economic development.

2020/2021 BizWalk

This year's survey was completed during an unprecedented Covid-19 pandemic year. The pandemic alters many things about shopping and working for both consumers and businesses in Zephyrhills just like the rest of the nation. Suppression of normal business during much of 2020 and for some, continuing into 2021, caused some businesses to fail, many to morph and adapt. It is appropriate to believe that business practices that emerge after the pandemic is behind us will reflect lessons learned and new patterns of accessing goods and services.

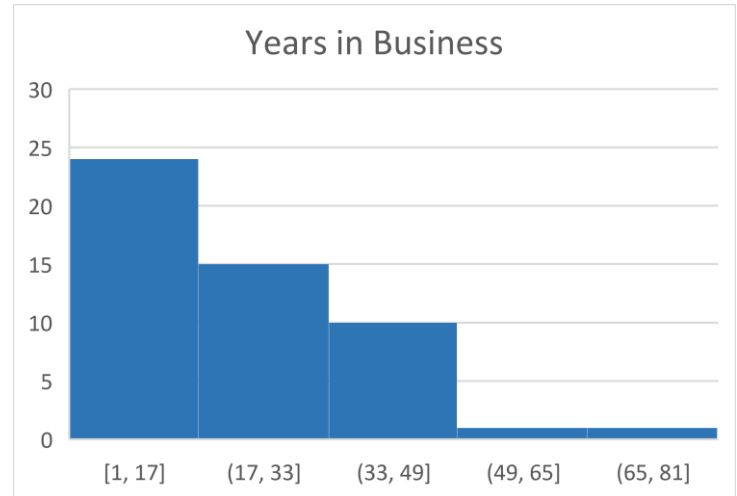
About the Businesses A map shows the area included in the survey with markers locating the 57 businesses included in the study.



Time in business

Businesses surveyed ranged from first year startups to long operating businesses, the oldest having been operating for 75 years. The mean number of operating years was 20 years. Clearly there is stable business mix in the community with new businesses continuing to open even during this very trying pandemic timeframe.

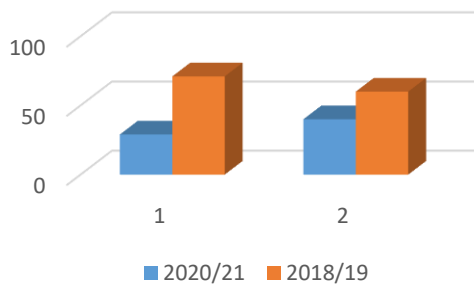
Many businesses have been in Zephyrhills for a long time. The average time in Zephyrhills is 20 years with the range from one to 75 years.



Facilities

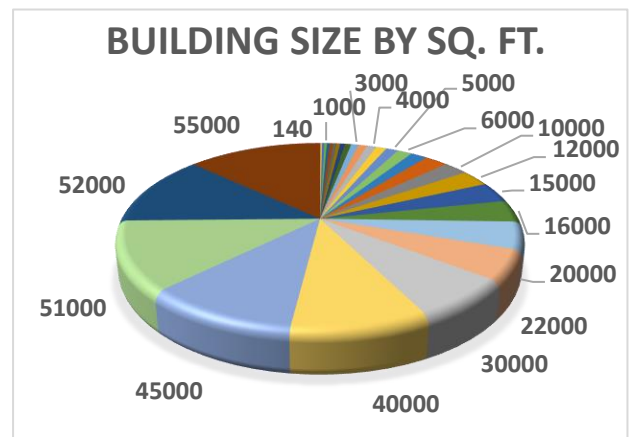
Roughly half the businesses own both their buildings and land (27 of 57 who answered this question). Almost a third of responders (29%) expressed plans for expanding their facilities in the coming year. Considering the survey was conducted during the pandemic, expansion plans were only little lower than reported in the 2018-2019 ZEDC survey (40% of the earlier survey respondents expressed plans for expansion).

Comparative Expansion Plans

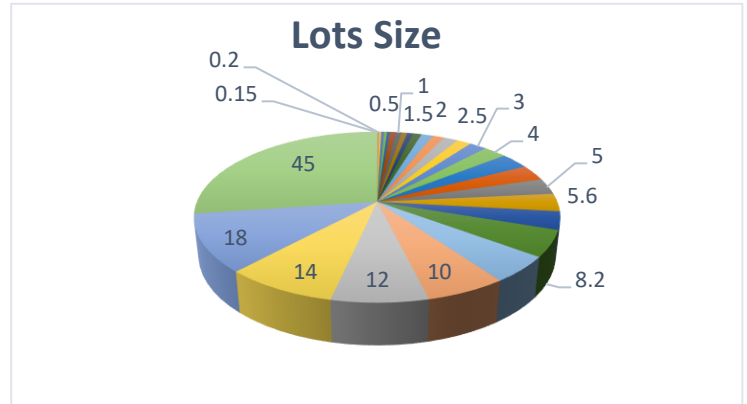


Building Size

Surveyed businesses ranged from a small home office (140 square feet) up to an entire hospital (313,000 square feet). The chart below shows the wide array of sizes without the hospital. The chart sizes displayed range from 140 square feet up to 55,000 and illustrates the wide range of building sizes for the businesses surveyed. There is a mix of very small, medium sized and large size facilities with the mean size (without the hospital) of just over 1,900 square feet.



Some businesses operate completely within their office space, while others operate over a much larger facility space. Thirty-five of the responding businesses reported an operational area from a minimum of 1/3rd acre up to the largest lot of 45 acres with a mean lot size of 4.6 acres.



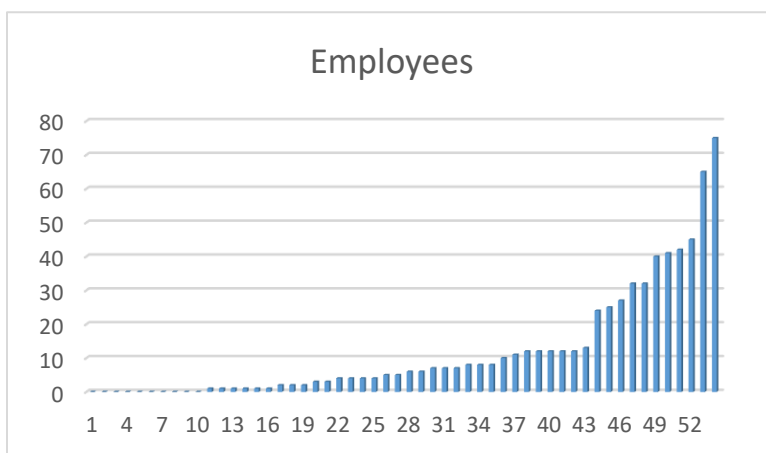
Business Ownership

Special ownership categories of veteran owned, women owned, and minority owned are shown below. Twenty businesses reported ownership in one these special categories, some having owners who fit more than one of these categories. Examples are veteran and woman or minority and woman owned.

Minority Owned	Veteran Owned	Woman Owned
4	6	15

Workforce

Businesses in this survey range from large to small in terms of employees. The chart below shows a range from 1 up to 75 employees. However, the three largest businesses were not included in the chart. The largest business included Advent Health Zephyrhills (1,400 employees), Zephyrhills Water Blue Triton Brand (300 employees), and K & K Glass (137 employees). Most businesses employee mostly full-time workers, with a few notable exceptions, like Advent Health Zephyrhills with 1000+ full-time and 400 part-time workers.



Over half (59%) of the companies plan to add additional employees in the coming year (34 of 57 respondents). Most of the respondents did not report changes in workforce were necessary due to the pandemic. However, about a third (29%) did make Covid-related personnel adjustments.

Most (83%) respondents did not reduce workforce due to Covid-19 related issues. Only 8 respondents found it necessary to furlough workers during this period.

A large majority (75%) of respondents reported difficulties in finding qualified individuals who wanted to work for their company.

Hard to Find Workers

Many businesses expressed the need for qualified workers. Below lists qualities employers are seeking.

A/C Installers	Maintenance
Boat Finishers, Patching	Mechanical, Aircraft Repair
Committed workers	Mechanical, PLC (Programmable Logic Controller)
Construction, Trade workers	Office Assistant
Customer service	Employees who show up & have driver's licenses
Dependable	Qualified Mechanic
Dependable, Stability, Great Customer Service	Qualified Real Estate Brokers
Ensuring they have the technical competence	Qualified Technicians, Strong work ethic
Experienced installers, dependable, trainable	Reliable
Experienced insurance people	Sales
Experienced RN's and other specialty healthcare	Sign designers and installers
Experienced with banking	skilled labor and office staff
Front Desk, Customer Service	Teachable Employees
Insurance Agents	Those working in a shelter
Knowledge of military specifications wiring/soldering	Truck Drivers
LPN, CNA, PCA	Welding
LP Gas Technician	Workforce quality

Respondents who specified training needed for employees were split between specialized training or certifications (71%) and management training (29%). A majority (61%) of employers offer on-the-job-training.



The most common recruitment source was reported as word-of-mouth and referrals. Many reported advertising open positions on the company website. Most new workers come from the local Tampa Bay area.



In spite of difficulty in finding workers, almost half (49%) of businesses reported a desire to increase the number of employees in coming months. This expectation of expanding the workforce is down from the 2018-19 rate of 77% reporting a desire for expansion. Keeping in mind that the current survey was conducted during the pandemic, 49% anticipating expansion is very healthy indeed.

Products and Services Provided

Zephyrhills businesses included in the survey offer a wide array of goods and services to their customers. Business activity includes manufacturing, refurbishing, and a variety of business services. Not surprising is the array of aviation related services.

Acute healthcare	Consulting	Notary services
Advocacy	Crisis hotline	Nutritional Supplements
Air Conditioning Service and Repair	Custom Injection Molding	PC Repair
Aircraft Interior Refurbishment	Engraving	Real estate development
Aircraft Painting	Financial Products & Services	Real estate leasing
Aviation General Repairs,	Fleet Lettering/Signage	Real estate sales
FAA Certified	Food bank	Real Estate Title Insurance
Aircraft Maintenance	General Cleaning Products	Rental houses
Aluminum Processor	Graphic/ logo design	Rental travel trailers
Aluminum Products	Healthcare Services	Restaurant
Annuities	Home delivered meals	Restoration
Assisted Living & Memory Care	Industrial Lubricant	Property Valuations
Auto Glass Repair	Insurance, all lines	Sandblasting
Auto Glass Replacement	Irrigation maintenance	Signs, Lighted Signs, Channel Signs
Auto Repair	Isotopic Based Saline Solution	Site Civil Engineering/Design
Automobile Loans	IT Support	Site Permitting
Automotive Products & Off-Road Kits	Landscape design and install	Skydiving Jumpsuits
Automotive Suspension Products	Laser Etching	Skydiving Wingsuits
Awards & Trophies	Lawn maintenance	Steel Fabricators
Banking: Checking/Savings	Legal services	Suit Alterations & Repairs
Banners	Lending	Tax Preparation & Resolution
Boat Builders	Medicare Plans	Tennis Facility & Academy
Bookkeeping	Metal Artwork	Tires
Business Cards/Printed Advertising	Military communication equip.	Trucking, Perishable
Business services	Military Wiring harness	Vehicle Graphics
Car Wash	Mobile Home Set Up	Vinyl Graphics
Defense Electronics	Personal Care and Skin Care	Weekly newspaper and website
Emergency shelter	Plumbing Services	Wellness Center
Employment services	Powder Coating	Windows
Commercial Landscaping	Propane Gas Service and Station	Windshield Calibration
Community center	Mortgages	Zephyrhills Water, Bottled Water

Business Profiles

Profiles have been created for all the industrial corridor businesses using data from the surveys. These profiles will be accessible and searchable via the *ClearlyZephyrhills.com* website. This data is useful as new businesses look for site location along with compatibility with other business sectors.

A business profile will include the following information in sample.

Business Name

Business statement (mission)

GENERAL INFORMATION	
Owner	
Number of years in Z'Hills	
Size of facility, building	
Land	
Lease or Own	
Additional Info	

CONTACT INFORMATION	
Phone number	
Email	
Website	
Address, linked to a map	

EMPLOYMENT	
Current employees	
Do you plan to increase	
Qualifications	
Difficulties hiring employees	

TRAINING	
Most difficult employee to recruit	
Skills needed	
Training needed	

FUTURE PLANS	
Do you have plans to expand	
If yes, by how much	
If yes, do you have room	

PRODUCT/ SERVICES	
What are your primary products or services	

Home Sales May Influence Workforce Availability

A review of MLS data for single family residential sales in Zephyrhills shows a 25% increase in sales in 2020-2021 compared to a similar time period in 2018-2019. During the same time typical houses became a little smaller and more expensive.

Home Sales	2018-2019	2020-2021	% Change
Units sold	265	330	25%
Mean Size	2,103.5 sq ft	1,871.5 sq ft	-11%
Mean Price	\$230,441	\$266,252	16%
Mean Price/Sq Ft	\$123	\$145	19%

A typical single-family home sold in Zephyrhills before and during the pandemic was a 4 bedroom, 2 bath house, but during pandemic typical houses were smaller and more expensive. Demographic analysis to better understand the type of buyer and future impacts on workforce availability is needed.

Knowing the concerns of employers will help determine where we channel resources. To begin to address this need, the following programs and initiatives begin to explore such opportunities with meaningful solutions:

Workforce Training Now and On the Horizon

Pasco County Schools offer career academies to position graduates to be prepared for the workforce. In 2007 the Florida Legislature passed the Career and Professional Education Act. The purpose of the Act was to provide a statewide planning partnership between the business and education communities in order

to attract, expand, and retain targeted, high-value industry and to sustain a strong, knowledge-based economy. The objectives of the Act are as follows:

- To improve middle and high school academic performance by providing rigorous and relevant curriculum opportunities
- To provide rigorous and relevant career-themed courses that articulate to postsecondary-level coursework and lead to industry certification
- To support local and regional economic development
- To respond to Florida's critical workforce needs
- To provide state residents with access to high-wage and high-demand careers
- Industry Certifications

Industry certifications provide credibility, recognition of achievement, and assurance of quality. Certification benefits students, businesses, and academic institutions by identifying predictable levels of performance and informing the community that established criteria are being met.

CTE/AE: Career, Technical and Adult Education



Preparing Today for Tomorrow's Workforce

OUR VALUES:

Employability • Inspiration • Excellence • Diversity • Engagement

OUR MISSION:

The Office of Career, Technical and Adult Education supports collaborative, innovative learning environments that prepare students for meaningful careers in a diverse and changing world.

OUR VISION:

Students will be workforce-ready and equipped with essential skills to secure meaningful employment and pursue post-secondary pathways.

Zephyrhills High School offers four such academies

- **Academy of Health Science** - This program offers a sequence of courses in the Health Science career cluster. The purpose of this program is to give students an opportunity to apply knowledge and skills related to the area of Health Science career cluster. The content includes but is not limited to practical generic skills in health occupations. In partnership with Nursing Assisant - This program offers a sequence of courses in the Health Science career cluster. This course is designed to prepare students for employment as nursing assistants SOC- 31-1014 (Nursing Assistants) in nursing homes, hospitals, or other health care facilities. The content includes, but is not limited to, interpersonal skills, medical terminology, legal and ethical responsibilities, safe and efficient work, gerontology, nutrition, pet-facilitated therapy, health and safety including Cardio-pulmonary Resuscitation (CPR) – heart saver level, and employability skills.
- **Academy of Aviation and Aeronautics** - This program offers a sequence of courses in the Engineering & Technology Education career cluster. The purpose of this program is to provide students with a foundation of knowledge and technically oriented experiences in the study of Aerospace Technologies, with a focus on transferable skills as well as

technological tools, machines, instruments, materials, processes and systems in business and industry.

- **Academy of Building Construction Technologies** - This program offers a sequence of courses in the Architecture & Construction career cluster. The purpose of this program is to prepare students for employment or advanced training in the building construction industry. The content includes applying construction techniques; reading plans and specifications; and developing trade skills in carpentry, masonry, electricity, plumbing and air conditioning.
- **Academy of Criminal Justice** - This program offers a sequence of courses in the Law, Public Safety and Security career cluster. The content provides technical skill proficiency, and includes competency-based applied learning that contributes to the academic knowledge, higher-order reasoning and problem-solving skills, work attitudes, general employability skills, technical skills, and occupation-specific skills, and knowledge of all aspects of the Law, Public Safety and Security career cluster.

Pasco County Schools has announced a new technical academy opening in August 2022. The Kirkland Ranch Academy of Innovation will feature programs which help students become work ready in such fields as:

- Applied Cybersecurity & Computer Science Principles
- Automotive Maintenance and Light Repair
- Automotive (Diesel)
- Biomedical Sciences
- Building Trades and Construction Technology
- Electricity
- Digital Media/Multimedia Design
- Engineering & Applied Robotics
- Patient Care Technology
- Welding Technology Fundamentals

Pasco-Hernando State College

In the wake of the COVID-19 pandemic Pasco-Hernando State College has stepped up with stackable certificates to fast-track programs which support workforce needs. Pasco-Hernando State College offers a variety of stackable certificates and degree programs to



Kirkland Ranch

ACADEMY OF INNOVATION



When will Kirkland Ranch Academy of Innovation open?
Classes start in August 2022.
The campus is expected to be open for in-person tours by July 2022.

Where is the school?
The official address is 9011 Curley Road, Wesley Chapel, 33545. That's near the intersection of Kiefer Road and Curley Road near the Watergrass and Epperson communities.

What programs will be available at Kirkland Ranch Academy of Innovation?
Programs will include the following:

- Applied Cybersecurity & Computer Science Principles
- Automotive Maintenance and Light Repair
- Automotive (Diesel)
- Biomedical Sciences
- Building Trades and Construction Technology
- Electricity
- Digital Media/Multimedia Design
- Engineering & Applied Robotics
- Patient Care Technology
- Welding Technology Fundamentals

FAST FACT: Kirkland Ranch Academy of Innovation's logo is inspired by the school building's unique architectural footprint.

What grade levels will be included?
Kirkland Ranch will open in 2022 with grades 9 and 10, and ultimately will serve students in grades 9 through 12.

Who will attend the school?
Students interested in an innovative career and technical educational environment will apply through the Pasco's School Choice Office at pascopathways@pasco.k12.fl.us.

Will transportation be provided?
The district is planning for a series of transportation hubs to provide school bus transportation. Details will be available during the summer of 2022.

Will Kirkland Ranch Academy of Innovation offer a standard diploma?
Yes. Students can earn a standard diploma and have many opportunities to earn industry certification.

Will the school have sports teams and clubs?
The school will not have sports teams. It will have clubs, with the specifics determined by the staff and students.






achieve career goals. Some programs are fast-tracked and can be completed in months instead of years. There are also program options for students who want to continue into the PHSC bachelor's degree program or transfer to a four-year university. Whether your goal is to train for immediate entry into the workplace, change careers, or update your professional skills to be job-ready and success-bound, PHSC has something for all students.

Program of Study	Degree Option	Career Path
Auxiliary Law Enforcement Officer	Career Certificate	Law, Public Safety and Security
Correctional Officer Basic Recruit Training	Career Certificate	Law, Public Safety and Security
Crossover from Correctional Officer to Law Enforcement Officer	Career Certificate	Law, Public Safety and Security
Crossover from Correctional Probation Officer to Law Enforcement Officer	Career Certificate	Law, Public Safety and Security
Crossover from Law Enforcement Officer to Correctional Officer	Career Certificate	Law, Public Safety and Security
Dental Assisting	Career Certificate	Health Science
Fire Academy	Career Certificate	Law, Public Safety and Security
Florida Law Enforcement Academy	Career Certificate	Law, Public Safety and Security
Medical Assistant	Career Certificate	Health Science
Paramedic	Career Certificate	Health Science
Phlebotomy	Career Certificate	Health Science
Practical Nursing (LPN)	Career Certificate	Health Science
Surgical Technology	Career Certificate	Health Science
Welding Technology	Career Certificate	Architecture, Construction and Manufacturing
Welding Technology Advanced	Career Certificate	Architecture, Construction and Manufacturing

CareerSource Pasco/Hernando has many programs to support today's employers from training grants to paying for on the job training and Talent Pipeline Bios to help business owners find the right fit for their company.

Training Awards and Resources

CareerSource Florida offers three training grants to support workforce development.

Customized Training provides grant funding for customized training for businesses that have been operating in the state of Florida for at least one year. It is designed to reimburse approved local businesses up to half of their eligible training costs. It helps businesses:

- To advance their current employees' wages and positions
- Enhance employees' productivity and work quality
- Build employees' loyalty and decrease employee turnover
- Allow businesses to remain competitive

FloridaFlex, formerly known as Quick Response Training (QRT), provides grant funding for customized training for new or expanding businesses. Through this customer-driven program, Florida is able to effectively retain and attract businesses creating new high-quality jobs.

The Incumbent Worker Training Program provides grant funding for customized training for existing for-profit businesses. Through this customer-driven program, Florida is able to effectively retain and keep businesses competitive through upgrade skills training for existing full-time employees.

On the Job Training

Grow your business with CareerSource Pasco Hernando's On-The-Job (OJT) Programs.

CareerSource Pasco Hernando will help pay 50-90% of your new hires' wages while they train with YOU! Employers may receive up to the 90% wage reimbursement under the current Department of Labor waiver. The reimbursement may occur under this waiver when employers select new employees from a pool of existing and/or eligible candidates.

The OJT Program:

- Get reimbursed up to 90% of your new hires' wages.
- Free job advertising with EmployFlorida Marketplace
- Pre-screened applicants to ensure the right match!

Talent Pipeline

CareerSource introduced a new Talent Pipeline which highlights qualified candidates seeking employment in the following fields:

- Customer Service Management | Client Management | Quality Assurance Management | Project Management P1001
- Project Manager | Scrum Master - P1002
- Communications Manager | Office | Reception - P1003
- Customer Service | Supervisory | Fieldwork | Survey - P1004
- Fraud Risk Analyst | Consultant | Director, BSA-AML Officer - P1005
- Experienced Office Professional - R1001
- Administrative Assistant - S1001

- Mental Health/Substance abuse counselor – S1002
- Lead Maintenance Supervisor – V1001
- Test Technician III – V1002
- Siemens Systems Expert/ Instructor – V1003
- Technical Service Engineer – V1004
- Traffic & Project Manager Professional – C1001
- Office Manager| Administrative Assistant – W1001
- Internet Customer Service Representative – W1002
- Administrative Assistant| Program Director-BSN W1003
- Enrollment Processor - W1004
- Assistant Registrar - W1005
- Administrative Assistant| Academic Records - W1006
- Documentation Specialist | Design Technician | CAD Drafter - W1007 through W1010
- Design Technician - W1008
- Documentation Specialist - W1009
- CAD Operator and Senior CAD Specialist - W1010
- Pet Groomer-T1001
- Front Desk Agent - T1002
- Customer service Rep - T1003
- Medical Receptionist - T1004
- Customer Service Admin| Rep - T1005
- Community Property Manager - T1006
- Food Service - T1007

Employers can find more information by emailing,
talentpipeline@careersourcepascohernando.com

Knowing that workforce issues are significantly influenced by educational opportunities within the community, ZEDC is seeking to work more closely with Zephyrhills schools to help the schools know more about business needs. Letting the business community better understand the many ways local schools are innovating and motivating students is also an important objective for ZEDC. The Zephyrhills Chamber of Commerce and ZEDC have also benefited by having senior administrators from Pasco County Schools and PHSC join the Board of Directors. Zephyrhills is fortunate to have a state college (PHSC), a private university (St. Leo) and a major research university (USF) within easy commuting distances. More information about schools in and near Zephyrhills can be found on the Clearly Zephyrhills website.

Other opportunities for economic growth:

Aviation Cluster Study, 2021 – In 2020, the Tampa Bay Regional Planning Council (TBRPC) undertook a comprehensive study of the Zephyrhills Airport in cooperation with the City of Zephyrhills, Pasco Economic Development Council, and ZEDC. The study was designed to

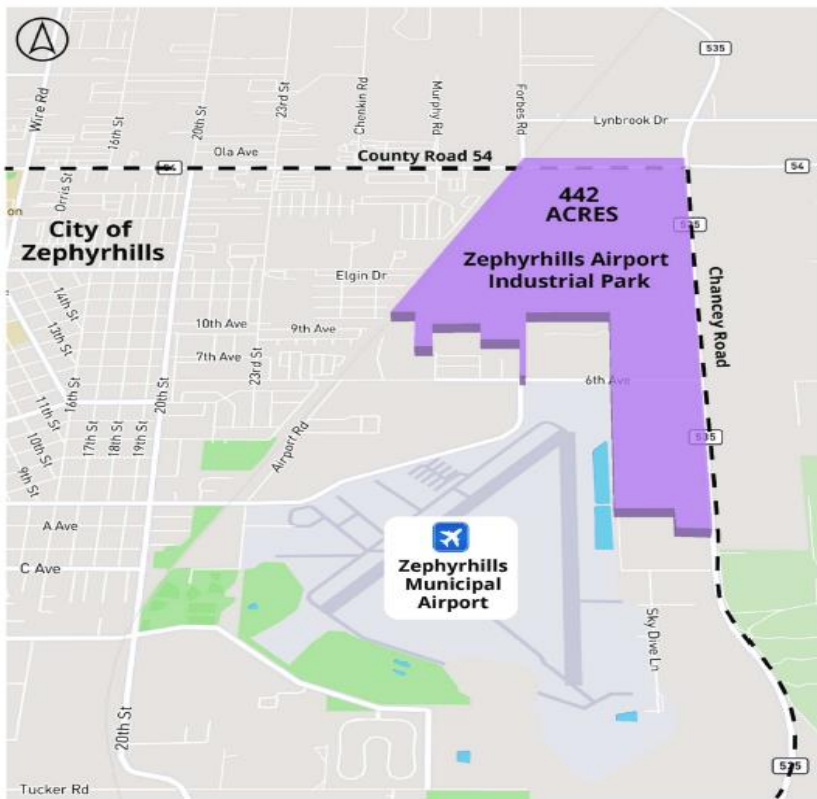
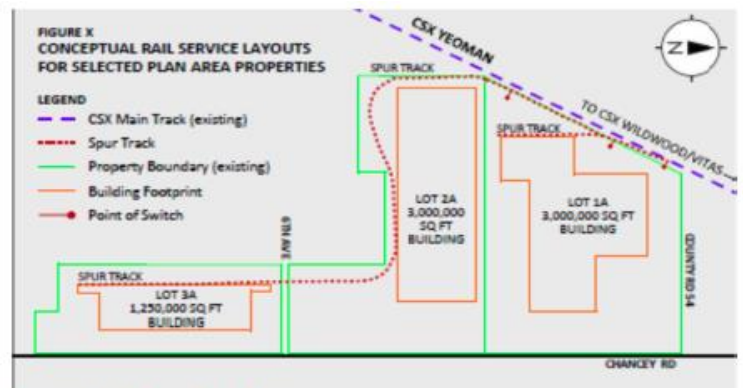


provide a better understanding of economic growth opportunities that could result for further development of a “aviation cluster” of related business activities associated with the airport. The results of the study in March of 2021 in a report titled: Zephyrhills, Florida. Aviation Cluster Study. The executive summary from the report follows.

“The US Economic Development Administration has provided a grant under the 2020 Coronavirus Aid, Relief, and Economic Security Act (CARES Act), to the Tampa Bay Regional Planning Council (TBRPC) to provide technical assistance aimed at economic recovery for the Council’s regional partners. At the request of Pasco Economic Development Council, TBRPC conducted a feasibility study of how the City of Zephyrhills might leverage its existing General Aviation airport (Zephyrhills Municipal Airport) and the nearby industrial park as the physical base for an aviation cluster of industries. An industry cluster is a combination of inter-dependent industries in related fields that take advantage of scale economies in labor and equipment to developed specialized but strong job growing economies. Silicon Valley’s software cluster and Detroit’s automobile manufacturing cluster are good examples, but smaller clusters in many industries may grow under the right conditions. The Brookings Institution identified five characteristics of a strong cluster strategy: where decision makers are focused on establishing a robust ecosystem, not quick job gains; the strategy is industry-driven, university-fueled, government-funded; where decision makers are willing to place a collective big bet on a unique opportunity while the ongoing effort is championed by passionate, dedicated leaders, and the cluster is anchored by a physical center. This study is focused on the characteristics of that robust ecosystem and the physical anchor of the cluster. The physical anchor could consist of the Zephyrhills Municipal Airport property and the nearby Zephyrhills Airport Industrial Park. The two components of this anchor would be combined in a two-tier land use strategy that focuses the most runway dependent firms “within the fence” of the airport, and less dependent firms, such as parts manufacturing or other supplies, focused within the industrial park. In terms of a robust ecosystem, TBRPC showed that there are gaps in the supply chains of aircraft manufacturing in general and in parts manufacturing in particular by contrasting the effects of a single firm’s growth in Pasco County versus the growth of that firm in the more developed aviation cluster of Duval County. Overall, the analysis also makes clear that an aviation cluster strategy is built on more than fostering the growth of aviation manufacturers. While Zephyrhills and Pasco EDC can pursue aviation manufacturing investment, the analysis shows that a broader base of services and skilled occupations is a foundational requirement of building an industry cluster. In other words, an aviation cluster

approach requires public and private convergence on investment in education as well as a broad perspective on which firms to recruit and which trades to emphasize in the region's community colleges. With a few related firms, enough to form a kernel of an aviation industry in Pasco County, TBRPC recommends that the City of Zephyrhills and Pasco County build on their existing partnership to lay the groundwork for the physical anchor of a future aviation cluster at the Municipal Airport. While there are federal grants through the US Economic Development Administration that can assist Zephyrhills, the partners should decide on whether to "collectively invest" in attracting this cluster that can be championed by passionate and dedicated leaders." As described more fully in the TBRPC report, continued development of the aviation cluster, based on general aviation uses of the airport has considerable potential to grow workforce opportunities and business growth for Zephyrhills.

The report goes on to provide several examples of aviation clusters and economic benefits accruing from them. The report concludes that "The City of Zephyrhills should continue to engage further with their public partners, the Pasco EDC and the business community to develop strategies and initiatives designed to elevate awareness of business opportunities at the airport that can be used to attract aviation related industries."



Business growth is considered for two tiers of development:

Inside the fence Outside the fence

Inside the fence refers to businesses that require direct access to the airport and includes such activities as:

- Corporate air fleet/executive jet services
- Recreation (parachuting and flying clubs)
- Law enforcement and fire control
- Medical services such as air taxi and supply deliveries
- Fixed-Base Operations (FBO)
- Maintenance, Repair and Operations (MRO).

Outside the fence businesses are those that interact in some way with the inside the fence activities, but do not require direct access to the airport itself. There is ample room for both tiers to develop.

Conclusion & Essential Data

- 57 Businesses completed surveys for the 2020-2021 study.
- Responding businesses were located throughout the greater Zephyrhills area, as reflected on the map shown on page 4 of this report.
- Surveys were completed online, by phone, and/or face-to-face interviews at the business.
- Interviews were conducted by ZEDC *volunteers* and Zephyrhills Chamber staff.
- Business longevity ranges from 1 year to 75 years with the mean time in business of 20 years.
- Size of facilities range from 140 square feet to 313,000 square feet, with a mean for the medium and small size facilities of just over 1,900 square feet.
- Special ownership categories of minority owned, women owned, and veteran own was somewhat greater among these businesses than those surveyed for the 2018-19 report. Women ownership in this sample increased from only 4 to 15 in this current study.
- Businesses range from a single employee to upwards of 1,400 employees, with most business falling into the small to medium range. Most businesses reported utilizing mostly full -time employees.
- More than half the companies (59%) planned to hire new employees during the next year.
- Finding qualified workers was viewed as a challenge with most new hires needing on-the-job training, which is unchanged from the 2018-19 report.
- Many of the workers need to have specialized training and/or certifications.
- Most businesses offer on-the-job training for employees, but some categories of employees require certifications or specialized training.
- New home sales offer potential to impact future workforce availability, with single family homes sales increasing by 25% during the past year.
- Zephyrhills businesses sell a wide variety of goods and services
- Sales range from acute healthcare to auto glass replacement and business services.

Zephyrhills Economic Development Coalition Business Agenda:

The Zephyrhills Economic Development Coalition (ZEDC) is comprised of leaders in business, government, education, and economic development who share a common goal to create a sustainable and vibrant business and economic climate in Zephyrhills. After reviewing the Chamber *BizWalks* and combining collective knowledge and understanding of the local economy, the ZEDC Stakeholders Advisory Council in 2015 identified three areas of focus deemed of highest priority to job-creation and business growth. ZEDC partners and advisory council volunteers have been able to champion this agenda through smart business and economic growth programs, services and advocacy efforts for the greater Zephyrhills area. The findings of the 2020-21 *Workforce BizWalks* show that with continued effort in these three areas should continue to be a priority with an emphasis on **education and workforce development**.

Infrastructure

Champion policies and funding for modernization of key infrastructure supporting targeted growth sectors of manufacturing, aviation, distribution, and small business/entrepreneur.

Education and Workforce Development

Champion programs, initiatives, policies, and funding that develop, attract and retain a highly skilled and educated workforce (note: the chamber is in the process of creating a foundation to address these needs).

Business-friendly Regulation and Policy

Champion Business-friendly policy and legislation that focuses on job-creation, business retention and expansion, and the attraction of new business.

Acknowledgments

About the *BizWalk* Committee: The 2020-21 *BizWalk* Committee is the Zephyrhills Economic Development Coalition's Business Retention and Expansion "Brain Trust". Members are comprised of Zephyrhills area leaders in business and education and is supported by staff from the Zephyrhills Chamber of Commerce and the Pasco Economic Development Council.

***BizWalk* Committee Members:** Carlos Acevado (Pasco/Hernando Career Source), Turner Arbour (PEDC), Bob Hatfield (Congressman Bilirakis), Missy LaPorte (SouthState Bank), Wm. Poe (City Manager), Tom Ryan (PEDC), Jennie Sammur (PEDC), John Scott (Gulf Coast Financial), Dr. Randy Stovall (PHSC), Sam Turgeon (Sunlight Realty), Todd Vande Berg (City Planner), David West (Dade City Church of Christ).

***BizWalk* Committee Staff:** Melonie Monson (Zephyrhills Chamber CEO).

Participating Businesses: Thank you to the following companies who supported the *BizWalk Committee* by allowing visits or taking survey: Aaartistic Armadillo, AdventHealth Care Center, AdventHealth Hospital, Amazing Signs, Anexa Biomedical, AmeriLife, Aviation Instruments

Technology, B & N Lenz Enterprise, Bahr's Aluminum & Construction, Bob's Auto Repair, C&G Web Enterprises, CareerSource Pasco/Hernando, Century Boats, Chris Bahr Plumbing, Cornelison Engineering, Crazy 4 Signs, Dad's Powder Coating, Dakota's Document Prep, East Pasco YMCA, Edge Landscaping, EZ Clean Car Wash, 645 Fabworx, Hawk Aircraft Painting, Heyl Truck Lines, K & K Glass, Lee Reed Insurance, Meals on Wheels of Pasco, Morrow Steel, Orbital Corporation, PJ Flaig, Inc, PuroClean, Rosecastle of Zephyrhills, Ryman Construction, San Antonio Citizens Federal Credit Union, Sarah Vande Berg Tennis Center, Sisel International, Skydive City, SONG Printing, Southern Charm RV, SouthState Bank, Sunbelt Lubricants, Suncoast Credit Union, Sunlight Realty, Sunnyside Mobile Home Community, Sunrise Manufacturing, Sunrise of Pasco, Sunstate Aluminum, Sunstate Title, The Laker/Lutz News, TonySuits, Vitis Realty, Your Turn, a Boardgame Café, Zephyr Aircraft Engines, Zephyrhills Rentals, Zephyrhills Water-Blue Triton Brands.

BizWalks Report Editorial Content Development: ZEDC Stakeholders Advisory Council Chair and BizWalk Committee member Dr. Randy Stovall, PHSC, and Greater Zephyrhills Chamber of Commerce CEO Melonie Monson.

Contributing Organizations: Tampa Bay Regional Planning Commission, 2020-21 Aviation Cluster Study; Sunlight Realty, MLS data; Pasco Economic Development Council, workforce data and target manufacturing surveys; City of Zephyrhills, new business data and mapping.

The Zephyrhills Economic Development Coalition is a strategic partnership between the City of Zephyrhills, the Greater Zephyrhills Chamber of Commerce, Pasco Economic Development Council, and Main Street Zephyrhills, Inc. The Zephyrhills Economic Development Coalition is housed in the Greater Zephyrhills Chamber of Commerce and is the Chamber's lead committee to energize its economic development initiatives and programs. The ZEDC has two components: the ZEDC Stakeholder's Advisory Council is a voluntary committee comprised of business and community leaders in the Zephyrhills area who share a common goal to create a sustainable and vibrant local business and economic climate. The members of the Stakeholder's Advisory Council serve at the invitation of the ZEDC.

The ZEDC Steering Committee is a working group of economic development practitioners that includes, at a minimum the City of Zephyrhills City Manager, City Planner, Airport Manager, and CRA Director; the Greater Zephyrhills Chamber of Commerce CEO and Economic Development/Government Affairs Chair; Pasco Economic Development Council Economic Development Manager; and Main Street Zephyrhills, Inc. Executive Director. The purpose of the Steering Committee is to provide coordinated implementation of local economic development plans and initiatives, to provide additional economic development expertise and administrative support with respect to the Stakeholders Advisory Council and the Zephyrhills Economic Development Coalition, and to provide propulsion and continuity between meetings of the volunteer committees.

Zephyrhills Economic Development Coalition

Sample Survey

2020/21 Workforce Survey

Company _____ Telephone (_____) _____
 Address _____ Fax (_____) _____
 City _____ State _____ Zip _____
 Contact _____ Title _____
 E-Mail: _____ Web Address: _____

A. GENERAL INFORMATION

Number of year's company has been in Zephyrhills: _____
 What is the size of your facility? Building _____ Sq. Feet Land _____ acres
 Do you ____ Lease or ____ own? If leased, when does lease expire? _____
 Is the company veteran owned? ☐ Yes ☐ No
 Is the company woman owned? ☐ Yes ☐ No
 Is the company minority owned? ☐ Yes ☐ No

B. FUTURE PLANS

Do you have plans to expand within the next two years? ☐ Yes ☐ No
 If yes by how much? _____ sf
 Do you have room to expand at your current site? ☐ Yes ☐ No

C. PRODUCTS/SERVICES

What are your primary products or services?
 a. _____
 b. _____
 c. _____
 Do you sell your product or services direct to customers online? ☐ Yes ☐ No
 If yes, what percentage of your sales are acquired online? _____
 Has the company added any new capabilities due to COVID? ☐ Yes ☐ No
 If yes, please explain: _____

 What customers, service providers or suppliers would you like to see located in Pasco?

C. EMPLOYMENT

Current employment: Full Time _____ Part Time _____

Do you expect this to ____ increase ____ decrease over the next year?

Does employment fluctuate during seasons? ☐ Yes ☐ No

Has your workforce model changed due to COVID? ☐ Yes ☐ No

Do you employ remote workers? _____% of your workforce work remotely

Do you expect remote working to increase in your company? ☐ Yes ☐ No

Did you lay off or furlough workers in the last year? ☐ Yes ☐ No

Are there plans to bring them back? ☐ Yes _____% ☐ No

If you bring them back will they need retraining? ☐ Yes ☐ No

Do you use temporary employment agencies? ☐ Yes ☐ No

If yes, number of monthly contracted hours? _____

Do you have contracted employees: ☐ Yes ☐ No

If yes, what percentage of your employees are contracted? _____

What type of employee is most difficult to recruit or job to fill?

What skillset, licenses, or certifications are required of employees?

What type of training would you need to improve the efficiency your business?

Indicate what type of training would be needed to improve the skills of your current workers?

(check all that apply)

☐ Basic Writing/Math/Reading ☐ Communications Skills ☐ Computer/Technology Skills

☐ Customer Service ☐ Mechanical/Technical Skills ☐ OSHA/Safety

☐ Supervisory Development ☐ Other: _____

Additional Comments: _____

Are you familiar with Career Source Pasco/Hernando training grants? ☐ Yes ☐ No

Are you interested in finding out more about employee training? ☐ Yes ☐ No

What proportion of your workforce comes from the local area?

_____ Zephyrhills _____ Pasco _____ Tampa Bay _____ Florida _____ Nationwide

What proportion of your workforce was recruited outside the Tampa Bay region?

____ Florida ____ Nationwide ____ International

What recruitment strategy is the most successful?

What recruitment strategies have not worked well?

Is there anything you can think of that would make recruitment of good employees more successful?

Is there anything else you want us to know or understand about your workforce needs?

Interview Comments:

Date survey completed: _____ Completed By: _____

ZEDC Follow-up ☐ Yes ☐ No

Results of Follow-up:

Zephyrhills Economic Development Coalition

Partners in Zephyrhills area business and economic development

