THRIVING CITIES

CITY PROFILE OF

# Orlando

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Thriving Cities is an initiative of the University of Virginia's Institute for Advanced Studies in Culture.
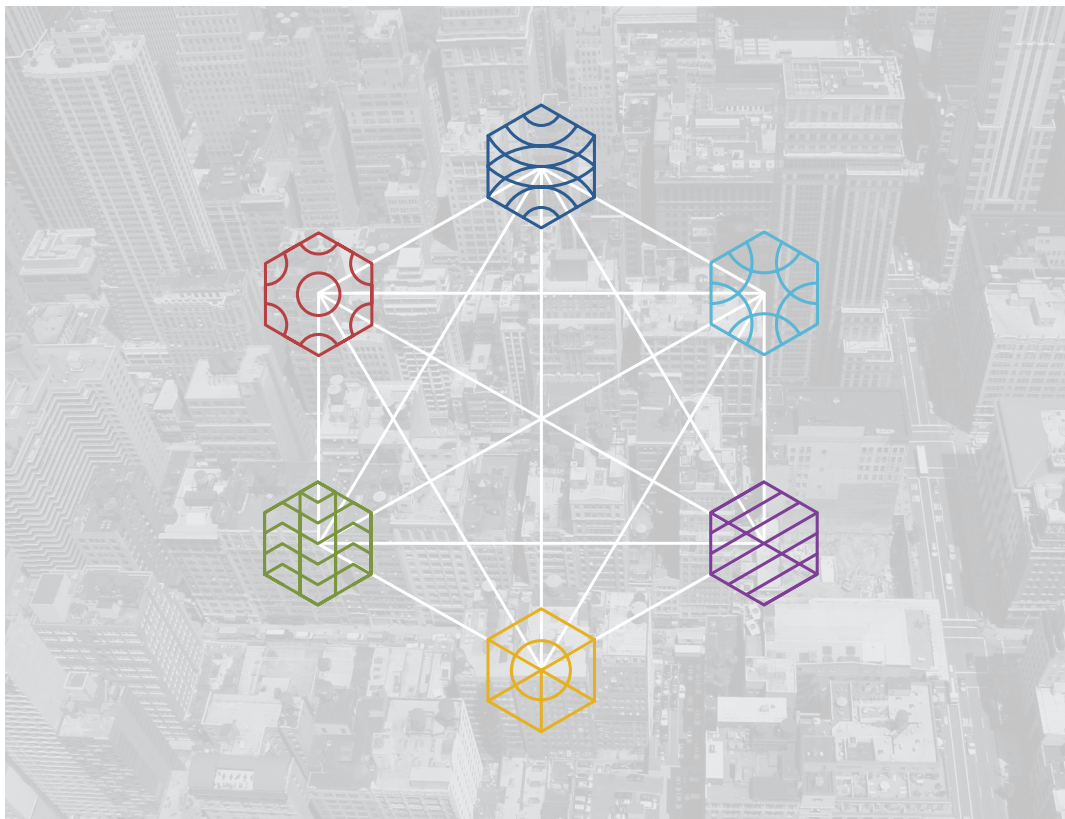
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## CITY PROFILE EXECUTIVE SUMMARY

Cities are never blank slates. Every urban ranking and rating begs
acknowledgement of lasting cultural legacies and histories. It is essential that any quantitative assessment not stand outside of context. At stake is the difference between possessing sheer quantities of information, on the one hand, and quality knowledge, or wisdom, on the other. In order to put data into a context for wise action, Thriving Cities has created distinct city profiles for its pilot cities.

These profiles are central in that they characterize a given pilot city in relation to the Project's distinctive "human ecology" framework and research design. In applying the human ecology framework, profilers collected and analyzed both quantitative and qualitative data on each city according to the six fundamental community endowment areas. Additionally, the profile assesses the unique ways in which the community endowments interact with and relate to each other in the context of a particular city.

City profiles include conventional demographic, economic, and political data, but also incorporate information pertaining to a city's historical peculiarities, cultural norms, and community perceptions, at both the macro-community and the micro-sub-community (e.g., neighborhood) level. They will stand alone as important resources about and in service to their communities.

# T A B L E   O F   C O N T E N T S

## I. BACKGROUND

### EXECUTIVE SUMMARY

This report was created for the Thriving Cities Project of the Institute for Advanced Studies in Culture (IASC) at the University of Virginia. The report was prepared by a five-member Orlando Profile Research Team (OPRT) that identified "leading voices" in Metro Orlando with key influence or an understanding of the Six Endowments outlined by the IASC. The OPRT conducted unstructured interviews and assessed the public comments of the leading voices in order to create a list of Essential Subjects for each Endowment—the areas of greatest threat or potential.

To facilitate its work, the OPRT created a working definition of thriving: "where the sum of past decisions meets the collective hope for the future." For Metro Orlando, past decisions have helped build America's most visited city, which received 59 million visitors in 2013. Orlando was also the ninth-fastest-growing city in the United States in terms of population in 2013. Rapid population expansion is nothing new to Orlando. The growth of its Metropolitan Statistical Area (MSA), which includes Orange, Seminole, Osceola, and Lake Counties, has remained very strong since 1970, averaging a net gain of eighty-eight people per day between 1970 and 2010. [1] This tremendous growth has been fueled by the tourism and hospitality industry and its leading purveyor, Walt Disney World, which opened its doors in 1971. And it is this same growth that has created Orlando's greatest challenges and opportunities.

Orlando's hope for the future is that its economy will sufficiently strengthen and diversify so that all residents can have a greater opportunity to prosper. Its service sector work force is vulnerable to the rapidly changing tides of not only a regional economy but, because Orlando is an international destination, the global economy as well. The cyclical nature of the tourism economy creates seasons of widely varying demand on social services that make it difficult to develop a viable independent sector. It is believed that if Orlando forms a cohesive identity that incorporates its successful tourism brands while not being exclusively defined by them, the area will strengthen by attracting other industries that require skilled labor and creativity.

## INTRODUCTION

Orlando is an adolescent living in the shadow of the Mouse. Growing fast, simultaneously unsure of itself and cocky, the City Beautiful struggles to embrace a cohesive identity apart from international tourism. Orlando's leadership believes that a widely celebrated local identity would further diversify the economy and help the city stay ahead of its explosive population growth. Between 1970 and 2010, the four-county area known as Metro Orlando has seen an average net gain in population of eighty-eight people per day. Since 1900, when the majority of Orlando's 22,000 residents were black, the population has increased a hundredfold, to over 2.2 million people—16 percent of whom are black and 28 percent Hispanic. (See "Comprehensive Demographics," Appendices.) The Native American population that was once the sum of humanity in Central Florida accounts for only about 0.5 percent of the current population.

This rapid increase in Orlando's population is the primary source of both its prosperity and its woes. Warm weather, air conditioning, and business-friendly policies sparked the growth that became a brushfire in the 1970s when the Walt Disney Company opened Walt Disney World on Orlando's southwest side. WDW has become the largest resort in the world, and the largest single-site employer in the United States.[2] Ironically, though its global influence is massive, WDW is not fully embraced locally because it is not a local brand. Its genesis stems from a sweetheart deal between Walt Disney and the state of Florida that gave Disney's empire unprecedented autonomy and control over what would transpire in his 42,000-acre realm. WDW is an international attraction where tourists and employees alike tend to visit for a little while before moving on to other places that feel more like home.

The weight of WDW clearly tips the scale of local industry toward hospitality services, a fickle line of business that tends to contract quickly when the economy falters, as it has in recent years. This shifting economy has rendered hospitality's low-wage work force particularly vulnerable to job loss. As jobs come and go, these workers are forced to make difficult choices regarding housing, utilities, and food. Many reach out to social service agencies in times of need, which quickly strains the capacity of these agencies during peak demand. Add to that the fact that many of these low-wage earners are minority-group members who historically have not had equal opportunity, and one easily begins to see that diversifying the regional economy and creating real economic opportunity for everyone is the primary challenge facing Metro Orlando.

## DEMOGRAPHIC OVERVIEW

In May 2009, the Central Florida Partnership and Tampa Bay Partnership convened a "Super Regional Leadership Conference" to coordinate efforts among twenty-three counties in Central Florida. The issues addressed by the conference included transportation, housing, health care, water and energy resources, growth management, and a legislative agenda. The area that has become known as the "Super Region" now stretches roughly 150 miles coast to coast across the center of the state along the politically much-analyzed I-4 Corridor. It contains the largest collection of theme parks in the world, a billion-dollar high-tech area, seventy-two miles of beaches, and two of the busiest airports in the country. There is a decidedly pro-business climate, with right-to-work laws, minimal regulatory hurdles to development, and, as is the case for all of Florida, no personal income tax. All of these attributes are augmented by a favorable climate featuring an average annual temperature of 72.6 degrees and an on-going population boom fueled by rises in the "under 25" demographic. The Super Region's three largest universities, the University of Florida, University of South Florida, and University of Central Florida (UCF), combine to provide nearly $17 billion per year in economic impact.[3]

Generated by two cities separated geographically by a mere ninety miles, the gross regional product of Tampa Bay and Orlando makes the area the ninth-largest regional economy in the United States, and the fortieth-largest metropolitan economy in the world. Tourism remains the leading industry, but at

least nine others are quickly presenting themselves as viable contenders:

- modeling and simulation
- health care and medical technologies
- film and digital media
- high tech
- space commercialization
- aviation
- aerospace
- sustainable energy
- financial services[4]

The Central Florida Partnership, anchored by the city of Orlando, coordinates leadership of the seven-county area that composes the eastern half of the Super Region. This area, known colloquially as Central Florida and sometimes by the name of its website, My Region (www.myregion.org), is the twentieth-largest metropolitan area in the United States, with a population of 2,920,603 in 2014, a 3.64 percent increase since 2010.[5] Population projections show that the seven-county area is expected to have nearly twice as many residents by 2050. Orlando's leadership is committed to addressing issues spawned by these projections by building a stronger infrastructure, most particularly with an immediate focus on transportation, industrial diversification, support for small business development, and job growth.

To further parse the data boundaries, Metro Orlando, the focus of this profile, is a subset within Central Florida; more specifically, it is the four-county area known by the U.S. Office of Management and Budget (OMB) as the Orlando-Kissimmee-Sanford Metropolitan Statistical Area. It comprises the counties of Orange, Seminole, Osceola, and Lake, as well as the cities of Orlando, Kissimmee, and Sanford. Orlando is its largest metropolitan area but still has just 11% of the MSA's total population.

The Metro Orlando Economic Development Commission is the only influential body using the four-county MSA as its fulcrum. In May 2014, the commission announced that "Orlando has regained 100 percent of the jobs lost during the recession and is leading the nation in year-over-year percentage job growth among metros with at least 1 million people."[6] Not surprisingly, the industry that maintains the greatest percentage of employees remains "leisure and hospitality" (21 percent).[7] This dominance is Orlando's blessing and curse. It is a blessing in the sense that it significantly energizes the regional economy. It is a curse in two primary ways: (a) The vast majority of these jobs are low-wage positions; and (b) this sector dominates the identity of the region and limits the potential to attract other industries to the area.

The city of Orlando (green on adjacent map, "Orlando-Kissimmee-Sanford Metropolitan Statistical Area") is the county seat of Orange County (orange)—the most populous of the four counties that make up the Orlando-area MSA. The other three counties are Seminole (blue), Lake (pink), and Osceola (yellow). All of these counties except Lake have formal charters that grant elected officials significant autonomy from the state of Florida in making local decisions and establishing budgets. Both the city of Orlando and the county in which it is situated are run by an elected mayor and a council of commissioners. Each of these entities maintains a separate budget and suite of services. The other three counties have elected boards of commissioners that hire county managers. For more information on the government, demographics, and economy of Metro Orlando, see the adjacent table, "Governmental, Economic, and Demographic Characteristics of the Orlando Metropolitan Statistical Area."
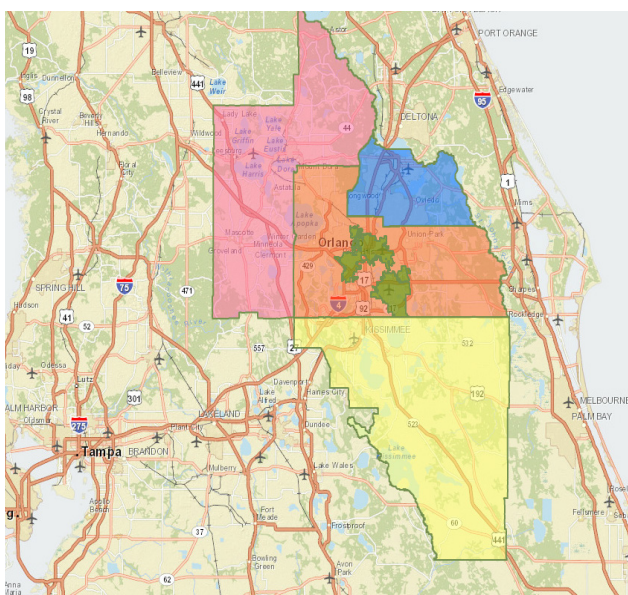
Orlando-Kissimmee-Sanford
Metropolitan Statistical Area.
Source: Environmental Systems Research
Institute, http://bao.esri.com.

| | Metro Orlando | Orange County | City of Orlando | Seminole County | Osceola County | Lake County |
|---|---|---|---|---|---|---|
| Form of government | Economic Development Commission | Charter[8] 1987: mayor/council | Incorporated 1885: mayor/ council | Charter 1989: board/ manager | Charter 1992: board/ manager | Board/ manager |
| Budget (millions) | $6,137 | $3,262 | $934 | $718 | $871 | $351 |
| Per capita budget | $2,785 | $2,752 | $3,768 | $1,682 | $3,068 | $1,144 |
| 2013 population | 2,203,521 | 1,185,538 | 247,962 | 427,004 | 283,998 | 306,981 |
| White | 70.0% | 63.2% | 58.0% | 78.2% | 71.0% | 82.0% |
| Black | 16.2% | 20.5% | 27.1% | 11.1% | 11.3% | 9.8% |
| Hispanic | 25.2% | 26.9% | 27.5% | 17.1% | 49.3% | 12.1% |
| Median household income | $48,032 | $47,373 | $40,871 | $54,198 | $43,852 | $52,688 |
| High school diploma | 87.5% | 87.1% | 86.8% | 91.0% | 84.4% | 87.0% |
| Employed | 91.8% | 91.6% | 91.4% | 93.0% | 91.1% | 91.6% |
| Employed in services industry[9] | 57.0% | 58.3% | 59.1% | 53.9% | 58.6% | 54.8% |
| 1970 population | 522,575 | 344,311 | 99,006 | 83,692 | 25,267 | 69,305 |
| 1970-2010 net population growth per day | 88.3 | 43.9 | 9.5 | 18.6 | 13.3 | 12.5 |

Governmental, Economic, and Demographic Characteristics of the Orlando Metropolitan Statistical Area

## A BRIEF HISTORY OF ORLANDO DEVELOPMENT

Four decades after Disney's fateful flyover, Orlando is a place of enormous vitality, diversity, ugliness, discord, inventiveness, possibility, and disappointed hopes, where no clown in a character costume can tell people how to live.
—T. D. Allman, 2007[10]

When Walt Disney decided to construct his kingdom on Central Florida real estate, his vision included an ideal community, or at least an experiment for one. His fantasyland for real people became known as the Experimental Prototype Community of Tomorrow, or EPCOT. This community would be fairly self-contained, high-tech, harmonious, friendly, and beautiful. His experiment necessitated a lot of planning that was doggedly protected against anyone else's plans in the region. Even though Disney's version of EPCOT was ultimately a failure, morphing into a segment of WDW's park offerings today, that model of an individual dreamer pushing his agenda forward has resulted in some impressively individualistic projects distinguishing themselves in an aesthetically cacophonous sea of development.

In spite of Orange County's overall size and its influence on the Metro Orlando MSA, it is the City of Orlando that has historically played a leadership role in terms of planning theory and practice in Central Florida.[11] The city moves the region forward in terms of sustainability, New Urbanism, and transit-oriented development. Current mayor Buddy Dyer has led a focused campaign to steer $1.1 billion in revenue from the tourist development tax (a hotel room surcharge) toward downtown venues that include a new performing arts center, a new arena, and renovations to the historic Citrus Bowl stadium. These developments are being loosely coordinated through an effort called "the Blueprint" that prioritizes two goals: (a) the use of local vendors and (b) the employment of local residents. The Blueprint is a part of a comprehensive mayoral plan to make Orlando a "world-class city" that is easily accessible, attractive, and business-friendly.

Orlando's leadership role stems from its incorporation as a city in 1885. The 1880s saw the arrival of railroads that propelled citrus groves over cattle ranches as the dominant economic driver. The population began to expand rapidly as supporting industries took shape and new residents built homes along attractive, brick-paved streets. However, a series of violent hurricanes and two destructive winter freezes at the close of the nineteenth century slowed area expansion and forced much of the citrus industry to relocate further south to even milder climes. In the 1930s, the Great Depression threatened to wreak further economic and cultural havoc, but the city government utilized funds from the Works Progress Administration, a New Deal program, to build post offices, courthouses, parks, and a municipal airport. These efforts provided important jobs as well as the needed infrastructure for the growth trend that was about to re-ignite and ultimately accelerate rapidly.

After World War II, the city fathers played a key role in luring the engineering firm Lockheed-Martin to Orlando, as well as in developing a large airport, a community college, a university, and two major highways—Interstate 4, which would bridge the gap between the heavily traveled north/south Interstates 75 and 95, and the Florida Turnpike, which connected Interstate 75 just northwest of Orlando to Miami to the southeast. It was the intersection of these highways in neighboring rural Osceola County that subsequently grabbed the attention of Walt Disney, whose plans to build a massive theme park were revealed by the *Orlando Sentinel* on October 20, 1965. This prodigious development would change everything about Central Florida's way of life virtually overnight; not the least of the effects would be disruption of the area's leadership, all previous planning, and the historic balance of power. When WDW opened, on October 1, 1971, there was not a single new hotel room to accommodate guests, nor a single new mile of roadway to ease travel to the park.[12] To say that the region was unprepared for what was happening is an understatement of magically ominous proportions. Setting their sights on sleepy Osceola County fifteen miles southwest of downtown Orlando, a set of dummy corporations secretly accumulated the majority of the original 27,000-acre property (now 42,000 acres) in the early 1960s. Through a deal with the State of Florida, the Walt Disney Company received the standard powers and autonomy of an incorporated city, including the capacity to issue tax-free bonds and waive county land-use restrictions. This meant that the primary beneficiaries of the development were, and remain,

the State of Florida and the Walt Disney Company.[13]  It was said that the local governments would receive great benefit from the resort, as they certainly have, but, in terms of direct tax revenue, roughly 75 percent goes to the state while Orange County receives the vast majority of the local revenue, 25 percent.  The City of Orlando receives none of the direct tax benefit.[14]

WDW is the most visited vacation resort on earth and the largest single-site employer in the United States, employing 66,000 "cast members" in Central Florida.[15]  Statewide, the number of jobs in direct and indirect support of WDW is over 170,000.  Furthermore, the economic activity generated by WDW accounts for 2.5 percent of Florida's gross domestic product.[16]  Employing roughly four times as many people as the region's next largest employer, WDW spends nearly $1.7 billion a year on payroll and benefits while Disney guests put nearly $2 billion a year into local coffers beyond the resort's boundaries.

Without question, WDW exerts a tremendous impact on the economy and identity of Orlando. But the largest lesson learned by the local planners concerned what happens to "vision" and "sustainability" when one is caught completely unprepared for such a transformative jolt.  The collective energy that might otherwise have been spent planning ahead instantly became absorbed with catching up.  And this reactive approach has been the norm ever since, only more recently exhibiting hopeful signs of maturation.[17]

Evidence that local planners had learned their lesson, at least in part, was revealed as counties began to adopt charters and conduct themselves in a more businesslike manner of the kind associated with cities. The first of these was Orange County, which adopted its charter in 1986, followed by Seminole in 1989 and Osceola in 1992. Lake County is the only section of the Metro Orlando MSA still not under charter. Among other things, these charters gave the counties greater authority, which provided additional incentive to make plans since the charters rendered these plans more defensible.  Charter authorities are protected in Florida's constitution, which now mandates a special act of the legislature to override local authority. No longer would it be simple to strike the same kind of special deal that transpired between the State of Florida and WDW.[18]

The City of Orlando also became more business savvy on the heels of the WDW development.  In 1990, Universal Orlando opened within the city limits and quickly became the city's single largest taxpayer.[19] The city also annexed Orlando International Airport and facilitated the redevelopment of the Orlando Naval Training Center into a modern residential development complete with a full set of local amenities. This development, christened Baldwin Park and also located well within the city limits, has all of the look, feel, and amenities of Walt Disney's initial idyllic planned community, EPCOT. Even though Baldwin Park is only about a decade old, it is already home to over 8,000 people and 125 businesses, and the City of Orlando is the primary beneficiary of the property and sales tax revenues.

Even though EPCOT, as originally envisioned, "was such a failure that Disney faced the embarrassing prospect of shutting it down,"[20] the idea for a well-planned, harmonious community remained active in the Walt Disney Company's imagination.   While EPCOT became another element of the successful theme park, Disney's commitment to a planned community was resurrected in the 1990s by then-CEO Michael Eisner in the form of a new town called Celebration. "Planned in an early-20th-century architectural style and… not zoned for high-density residences, Celebration was named the 'New Community of the Year' in 2001 by the Urban Land Institute."[21] The town, which is no longer controlled by the Walt Disney Company,[22] is about the size of Baldwin Park, with about 7,400 residents, and now boasts a state-of-the-art medical complex that attracts its own loyal band of global visitors.

Yet another major development initiative also promises to have a substantial economic impact on life in Central Florida.  Situated on the old footprint of a demolished downtown arena, Creative Village is planned to be a sixty-eight-acre mixed-use, transit-oriented, urban infill neighborhood that will be home to leading institutions of higher education, as well as high-tech, digital media, and creative companies, plus a diverse mix of students and permanent residents. By embedding itself in the geographic heart of downtown Orlando, Creative Village is focused on fostering the area's latest iteration of a "live, work, learn, and play" lifestyle.

## PART II: ENDOWMENTS

### "THE SUSTAINABLE": THE REALM OF NATURAL RESOURCES, PUBLIC HEALTH, AND THE ENVIRONMENT

Orlando is like an orchestra playing music without a score or a conductor.
— An anonymous executive [23]

"The Sustainable" is the realm of natural resources, public health, and the environment—fundamentals for sustaining life itself. With a significant breakdown in any of the aforementioned areas, thriving will be adversely affected, perhaps dramatically so. The Orlando Profile Research Team sought conversations with leading voices in each of these three critical areas. As the interviews were conducted and public comments were assessed, Essential Subjects emerged—subjects that consistently presented themselves as either a threat to a thriving Orlando or evidence that Orlando was indeed flourishing in that area. The subject of Identity emerged as a vital area of concern for the future of Orlando, and it was placed alongside Ecology and Public Health as the Essential Subjects of the Sustainable Endowment.

### IDENTITY

One of the most often-cited issues adversely affecting a thriving Orlando is the lack of a cohesive identity. In 2012, a comprehensive values study was conducted by the Central Florida Partnership. A group of 150 leaders gathered to discuss how to enhance the region's global competitiveness and quality of life. Three "Source Dilemmas" were identified as the keys to moving the region forward:

- agreeing on "who we are"
- understanding our corporate, civic, and individual responsibilities (discussed in "The Good")
- investing in a regional transportation system (discussed in "The Prosperous")[24]

To the world, the identity of the area is subsumed under the banner of "Orlando," and to most people that is virtually synonymous with theme parks. This identity has not been fully embraced locally—either the theme park synonym or the name itself. To many locals, "Orlando" is simply one part of the region, an important city and the county seat of Orange County. But Orlando represents less than 3 percent of the land area of four-county Metro Orlando, the focus area of this report, and has only 11 percent of its population. People who live in other areas of the region such as Sanford, Winter Park, and Kissimmee do not appreciate being labeled as living in Orlando. Be that as it may, no similarly powerful global brand has surfaced to replace Orlando as an identifier for the area except perhaps WDW, the world's most visited theme park. And to locals who do not actually work at the theme park, "Walt Disney World" is just the name of a tourist attraction that is worlds away from day-to-day life. "Central Florida" is also used to describe the region, but the name has not been used widely or consistently. And even though it used by UCF, the Central Florida Foundation, and the Central Florida Partnership, many of those interviewed felt that the name did not engender much excitement.

The impact of this issue goes far beyond mere agreement on a name. The identity of an area is what attracts or repels certain businesses, and the business landscape creates the foundation for the regional economy. The strength of that economy has far-reaching implications for how well an area can support a high quality of life for its residents and weather affronts to its overall well-being.

While there are many contributors to the absence of a cohesive identity, one that leaves many visitors and locals befuddled is the two-government structure of Orlando and Orange County. Many major cities, such as Atlanta, Nashville, and Jacksonville, have long since consolidated their city and county governments. Orlando still operates under a two-government system. The City of Orlando has a mayor and city council, plus the typical bureaucracy of service providers. Orlando is the county seat

of Orange County, which has a parallel governmental structure, having decided to convert its elected office of chairman to a mayoral office in 2004. Thus, any major political, economic, or cultural decision becomes, for all practical purposes, the concern of two competing agendas and budgets, no matter how collegial the individual officeholders are at that time. To further complicate matters, Metro Orlando includes three additional county governments (Lake, Osceola, and Seminole), two other principal cities (Sanford and Kissimmee), and thirty-eight incorporated suburbs with populations of 10,000 or more.

Orange County commands the largest budget of civic agencies in Metro Orlando; it was $3.62 billion for fiscal year 2013-14. In addition to the typical public administration, safety, and human services responsibilities, Mayor Theresa Jacobs and the Board of County Commissioners oversee nineteen initiatives that focus on a range of issues from domestic violence to youth mental health to economic development. The Orange County Convention Center is now the second-largest convention facility in the country. And the county is also home to seven of the ten most visited theme parks in the United States. But in spite of its obvious central role in the region, the name "Orange County" invokes thoughts of Southern California for most people in the country.

The Orlando Economic Development Commission launched an ad campaign in 2014 called "Orlando, You Don't Know the Half of It." The campaign, with projected expenditures of about $1.5 million dollars a year, is intended to tell the full story of Orlando, which is about more than the theme parks for which it is so widely known. Another effort, Project DTO (for "downtown Orlando"), which is focused on the downtown core, also has a team working on identity-related themes. So while work is certainly being done to address this Essential Subject, an overarching identify that gels with both locals and visitors has yet to fully emerge.

## ECOLOGY

Central Florida's natural world has immense value ecologically, aesthetically, and even medically. Wetlands abound, along with hundreds of lakes, rivers, and tributaries, providing critical habitat for waterfowl, manatees, and other wetland-dependent fauna and flora. The swampy areas act as a powerful natural filter, pulling pollutants out of the water cycle. The region's many sunny days and mild temperatures make it an agricultural cornucopia and a prime fit for solar power. Also, oceanic cross-breezes and a low level of heavy industry make the Orlando area an oasis of good air quality. Central Florida's air quality is consistently rated "good" (the best category), and the findings for Orlando on the Air Quality Index (AQI)[25] consistently place it among the top twenty-five cleanest cities in the United States in terms of year-round particle pollution.[26]

The mayor of Orlando has stated that he wants his city to be the cleanest in the Southeast. Thanks to federal grant dollars, Orlando was recently able to hire three staff members  for seven environmentally centered initiatives in which the City of Orlando is involved or taking a leadership role in the region. Working under the banner of Green Works Orlando, this team is focused on implementing energy efficiency measures in existing building and new construction, increasing the use of solar energy, and assisting and encouraging green practices in regard to agriculture, community gardens, and farmers' markets. The mayor's office recently asserted that these initiatives have already produced $1 million in energy savings, led to the completion of eight municipal buildings certified to have met LEED (leadership in energy and environmental design) standards, brought Central Florida's first commuter rail online, and enabled the retrofitting of 1,200 homes with energy efficiency improvements.[27]

**Lake Eola Park, downtown Orlando**
**Source: iStock, photographer – rgaydos**

A large portion of downtown Orlando has been designated the Orlando Economic Enhancement District (OEED). This designation signifies that Orlando is participating in a state program that encourages redevelopment of properties by the private sector. An important aspect of the OEED program is redevelopment of acreage with a brownfield designation. There are numerous tax incentives and direct bonuses for businesses or property owners that are interested in developing properties within the OEED. Today, there are sixteen active brownfield development projects in Orange County, nineteen in Seminole County, two in Osceola, and five in Lake County. At the state level, since 1997 the brownfields program has cleaned up sixty-four sites. The result has been 50,000 confirmed and projected jobs and direct capital investments of $2.4 billion.

On the federal level, Orlando is one of ten cities in the United States participating in the City Energy Project, a national undertaking to cut energy waste in large buildings. In Orlando, commercial buildings contribute 51 percent of greenhouse gas emissions and consume a substantial amount of the energy consumed in the city.[28] The Orlando Municipal Operations Sustainability Plan describes a series of environmental investments, and Orlando's Tree Canopy Study has provided objectives for expansion of the city's urban forest. As a member of the Get Ready Central Florida public-private coalition, Orlando is one of thirteen cities that have been recognized by the Rocky Mountain Institute as a "national leader" in the effort to make regional preparations for widespread use of electrically powered transportation.[29]

Orlando Runs on Sun was part of the U.S. Department of Energy's Solar America Communities initiative designed to improve the use of solar power and other renewable sources of energy. A major goal of this national-local partnership was to identify barriers to the adoption of solar power more broadly. In Florida, there are two typical but significant barriers: cost and non-regulation. Solar power costs nearly twice as much as power from plants fueled by natural gas.  Furthermore, unlike twenty-nine other states, Florida has no requirement that a certain percentage of energy come from renewable sources.[30] In spite of those hurdles, the Orlando Utilities Commission has projected that the cost of solar power will be equal to that of power from natural gas by 2017. The utilities commission, which is owned by the City of Orlando, is preparing for this "crossover point" by building relatively small "solar gardens"[31] and working to increase the number of new business and residential customers that use solar power.[32]

More than 100 lakes grace Orlando's landscape. Central Florida is a land of a thousand lakes, and then some—there are 2,730 in the region.[33] Lake water quality is therefore of paramount concern. There are three primary causes of lake pollution: stormwater runoff, saltwater intrusion, and new developments built on natural floodplains. The Orlando mayor's Green Works Task Force has suggested the following as 2018 goals: reduce consumption of potable water per person by at least 3 percent and increase by 85 percent the number of lakes that are considered to be of "good" quality.[34]

## PUBLIC HEALTH
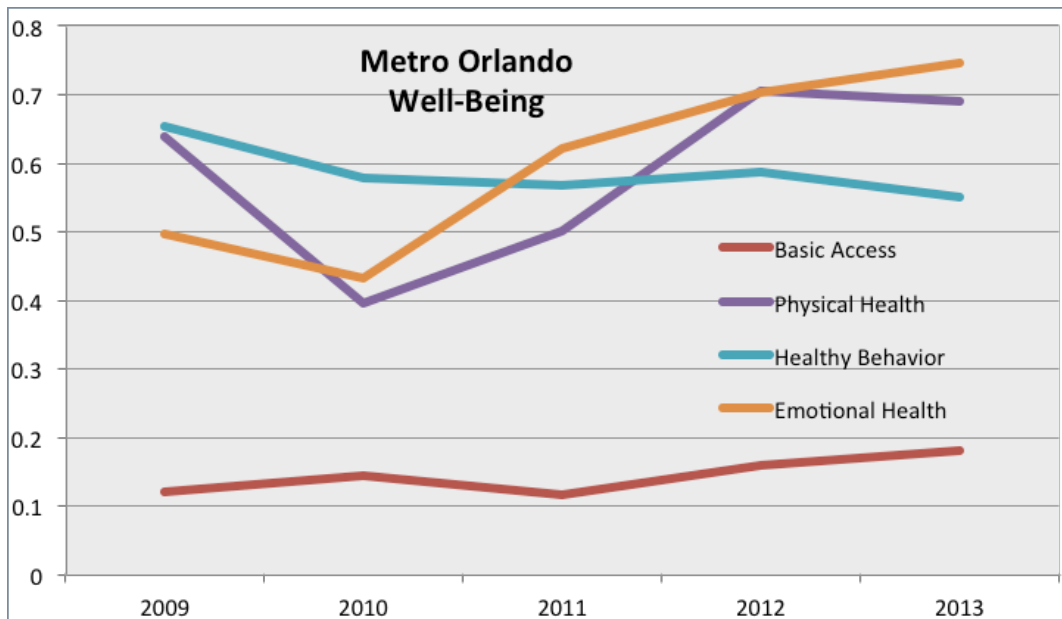


**Orlando's Rankings on Four Measures of Well-Being Relative to Average of Major U.S. Cities (1.0 = average). Source: Gallup Organization and Healthways.[35]**

The Gallup Organization and the health services organization Healthways devised a fifty-four-question survey that is used daily to assess national and regional well-being. An overall index with six sub-indices has been created for interpretation of the survey data. Four of the six sub-indices are shown in the adjacent table, "Orlando's Ranking on Four Measures of Well-Being." The graph shows that Metro Orlando has consistently ranked in the lowest 20 percent of American cities in terms of "basic access," which relates to one's access to resources that help maintain a healthy life—for example, primary care physicians, dentists, medicines, or fresh fruits and vegetables.

The Gallup data reveal that basic access poses a significant public health challenge for Metro Orlando. Among other variables, basic access is tied to personal income. Those with higher incomes tend to have better health care and more immediate access to high-quality grocery stores, and generally to feel more secure about the future. Orlando's large service-sector work force receives relatively low pay and is particularly vulnerable to economic fluctuations. And while the area has seen tremendous growth in population and many businesses are thriving, people in the lower economic strata have not acquired the security of having their basic needs met.

There are large nonprofit health care providers that are responding to the community's access issues and other pressing health needs. Two of these providers recently partnered with the Orange County Health Department to form the Central Florida Community Benefit Collaboration, "the first-ever multi-hospital, public health department joint community health needs assessment."[36] This assessment covered three of the four counties of Metro Orlando (Orange, Osceola, and Seminole), a region that is home to several respected hospitals that are ranked in the nation's top 100, a Level 1 Trauma Center, nine designated teaching hospitals, and the UCF College of Medicine.[37]

| Orange County | Osceola County | Seminole County |
|---|---|---|
| Diabetes | Heart disease | Obesity |
| Heart disease | Obesity | Diabetes |
| Obesity | Cancer | Cancer |
| Maternal and child health | Diabetes | Heart disease |
| Cancer | Asthma | Substance abuse |

**Top Five Areas of Community Health Need (in Rank Order), Three Counties in Metro Orlando**
**Source: "Community Health Needs Assessment," Central Florida Community Benefit Collaboration, 2013,**
**https://www.floridahospital.com/sites/default/files/pdf/chna_with_interactive_toc.pdf.**

Cancer and heart disease are the leading causes of death in the three counties. The leading cause of premature death is major cardiovascular disease followed, in order, by motor vehicle collisions, suicide, stroke, breast cancer, and diabetes. Diabetes is the most prevalent chronic disease in the tri-county region, affecting almost 200,000 residents. Asthma, chlamydia, prostate cancer, and breast cancer are the top four causes of illness.

Lack of health insurance for adults and children is a major barrier to health care access in the community. The percentage of adults with any type of health insurance in 2013 ranged from 84.8 percent in Orange County to 78.6 percent in Osceola County, well below the Healthy People 2020 target of 100 percent.[38]

Access to fresh fruits and vegetables is also a major public health issue in Metro Orlando, even though the area plays a major role in food processing and distribution. "In 2013, Orlando had 159 community garden plots, 7 farmers' markets, and 83 grocery stores. However, only around 50 percent of the city's residents [could] access fresh foods within one mile of their residences. And while Orlando is home to more than 70 food processing and distribution facilities, small and medium-sized farms have expressed difficulties accessing these facilities."[39] In response to these realities, the Green Works Task Force established two 2018 targets: (a) making sure that affordable food options are available within one mile of every Orlando resident, and (b) doubling the number of local food hubs, food production or distribution facilities, and community gardens.

There is no formal city policy to shape food prices, but both city and county officials have been involved in encouraging the creation of community gardens, reducing "food deserts," organizing farmers' markets, and providing funding for initiatives like Hebni Nutrition that offers educational services in distressed neighborhoods. The City of Orlando additionally played an instrumental role in getting a Wal-Mart Neighborhood Store launched in a historically distressed section of town—the first full-service supermarket in the area in over sixty years.[40]

## "THE PROSPEROUS": THE REALM OF ECONOMIC LIFE

A revolution is stirring in America. In the face of economic stagnation, fiscal turmoil, and federal gridlock, the focus of power… is shifting downward, away from Washington… towards our major cities and metropolitan areas…. Mayors, university presidents, CEOs of major firms and heads of business associations, labor unions, civic organizations and [not-for-profits] are, in essence, leading the restructuring of the national economy.
—Buddy Dyer, Mayor of Orlando[41]

The Endowment of "The Prosperous" is the realm of economic life. In the metropolitan revolution, cities are taking primary responsibility for growing more jobs and making their communities more economically vigorous. In Metro Orlando, this responsibility is spread among an array of voices and interests coming from over ninety incorporated areas. The strongest voice comes from the area's

largest city—Orlando. But that city has only 11 percent of the Metro Orlando MSA's total population of 2.2 million, and a mere 2.7 percent of the total land area of 4,012 square miles. The two other primary cities in Metro Orlando, Sanford and Kissimmee, are home to 5 percent of the remainder of the Metro Orlando population. Over two-thirds of the Metro Orlando population lives in unincorporated places.[42] Therefore, each of the four county governments that make up Metro Orlando has a crucial role, with Orange County (population about 1.2 million) being the dominant player.

This myriad collection of sometimes-competing interests presents one of Orlando's biggest challenges to becoming more prosperous. These diverse stakeholders have demonstrated the capacity to collaborate, and this cooperation has been a key strength driving economic development. Lake, Orange, Osceola and Seminole Counties make up the MSA as defined by the U.S. Office of Management and Budget, but certain regional issues such as transportation have necessitated bringing additional voices into the mix, including neighboring Brevard, Polk and Volusia Counties. Once at a common table, the collaborators officially bound themselves together as the Super Region, which reaches all the way from Daytona Beach to include another major metropolitan player, Tampa. As the population continues to explode, the lines marking off separate identities and different local agendas have blurred, yielding to a regional set of strengths and concerns.

## EMPLOYMENT

According to the Metro Orlando Economic Development Commission, in March 2014 the Metro Orlando MSA had an unemployment rate of 6.0 percent, 1.2 percentage points lower than a year earlier. By comparison, the Florida and U.S. jobless rates were 6.3 and 6.7 percent, respectively.[43] About 1.1 million people were employed in the area,[44] and total wages for the quarter that ended on March 31, 2014, were over $10 billion, a one-year increase of 4.7 percent. The average annualized salary was $42,644, a one-year increase of 2.6 percent.[45]

The Metro Orlando Economic Development Commission's March 2014 economic indicators report shows that the leisure and hospitality industry, at 21 percent of all jobs, remained the leading employer in the area. One in three jobs in Central Florida is tied to tourism, although area leadership is persistently working to strengthen and diversify the regional economy. The next-largest jobs segment in March 2014 was professional and business services, 17 percent, followed by education and health services, 12 percent.[46] Industries experiencing growth in the four-county area also included construction, which grew 8.6 percent; manufacturing, which increased 4.5 percent; leisure and hospitality, up 4.3 percent; trade, up 4.2 percent; and transportation and utilities, up 3.6 percent. Government had the lowest growth rate, at 0.03 percent.

**Orlando ranks thirtieth among MSAs in gross domestic product, eighty-seventh in median household income, and eighty-second in per capita income.**

Source: U.S. Department of Commerce.

In 2013, the four-county area enjoyed a record 59 million visitors, and the leisure and hospitality industry registered an economic impact of more than $27.6 billion. The area's top ten employers are all located in Orange County, and of these, only Publix Supermarkets has locations throughout the four counties. The top six employers in 2013 were

1. Walt Disney World, 66,000[47]
2. Orange County Public Schools, 21,984
3. Orlando International Airport, 18,000
4. Florida Hospital (Adventist System), 17,600
5. Universal Orlando, 16,500
6. Orlando Health, 15,867[48]

| Living in poverty | Orange | Lake | Seminole | Osceola | MSA | United States |
|---|---|---|---|---|---|---|
| White | 13.6% | 12.5% | 9.3% | **16.4%** | 12.9% | 12.5% |
| Black | 25.8% | 24.3% | **26.0%** | 21.9% | 25.3% | 27.1% |
| Hispanic | **22.4%** | 21.7% | 14.3% | **22.4%** | 21.3% | 24.7% |
| ALL | 17.0% | 13.8% | 11.3% | **17.9%** | 15.5% | 15.4% |

**Poverty Rates in the Metro Orlando MSA, 2013 estimates, by Race and County**[49]
**(Bolded numbers are highest in row; italicized are lowest.)**

Although there are many job opportunities in Metro Orlando, the nature of the economy is such that many of these jobs are low paying. A recent study found that nearly 46 percent of Metro Orlando households struggle to afford the basic necessities of housing, child care, food, health care, and transportation. Two-thirds of these households were working, characterized in the study by the acronym "ALICE," which stands for "asset-limited, income-constrained, employed."[50]

## DIVERSIFICATION

As of 2013, Orlando was home to only two Fortune 1000 companies, Darden Restaurants and Tupperware. WDW, the largest employer in the area, is based in California. Thus, the brand that most significantly influences the identity of the region does not truly call Central Florida home. This presents problems for diversification that local leaders are working to address.
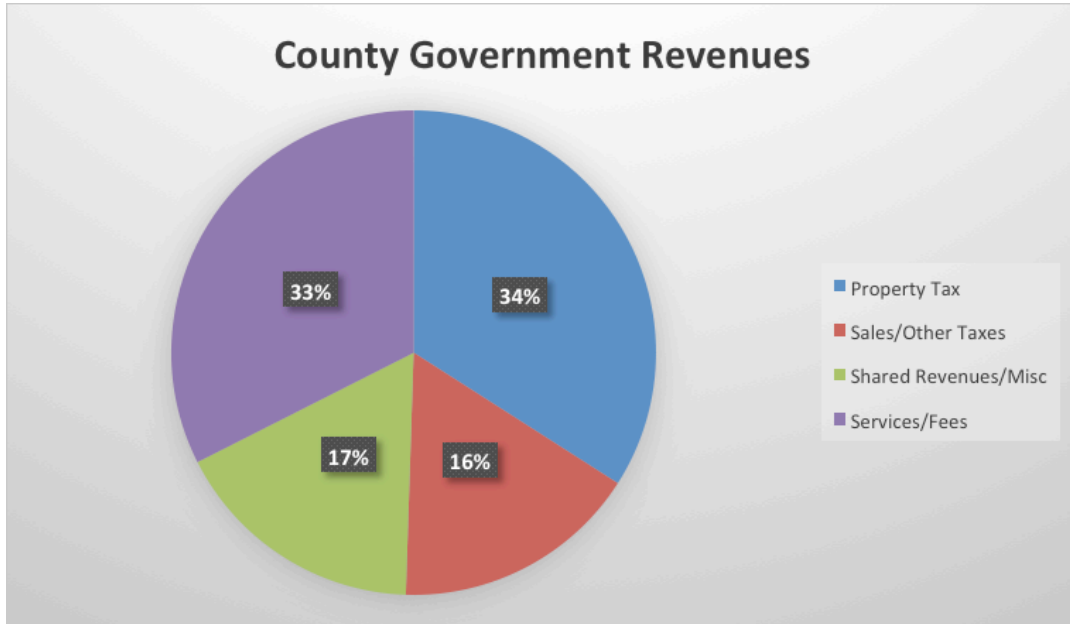
Nowhere is Central Florida's commitment to economic diversification better exhibited than in the new chapter being written at Lake Nona Medical City. Carefully planned and configured, this 650-acre health and life sciences park is a landmark for Orlando that has become a showcase for the medical world through its strategy of creating a geographically centralized focus for sophisticated medical education, research, and treatment. The multi-billion-dollar development is ultimately projected to have an economic impact on the Central Florida similar to that of WDW.

Based on the theory that a cluster of health care and bioscience facilities in proximity to one another will accelerate innovation, this intellectual hub moved rapidly from a concept in 2005 to a medical school that welcome its first students in 2009. Medical City has become home to some of the nation's top hospitals, university campuses, research institutions, and health and life science companies, such as the UCF Health Sciences Campus, Sanford-Burnham Medical Research Institute, the VA Medical Center, Nemours Children's Hospital, and the University of Florida Research and Academic Center.

Central Florida leadership is also joining the state government's efforts to transform Florida's economy by becoming a global hub for trade, logistics, and export-oriented manufacturing.[51] Since 2010, the Florida state government has invested in strategic transportation projects, created the first-ever statewide freight mobility and trade plan, and initiated innovative programs for employer-driven training and company-specific export development. Florida created over 23,000 new jobs in trade and logistics from 2010 to 2012 and more than 9,000 jobs in manufacturing.[52] The value of goods exported by Florida companies increased from $55 billion in 2010 to a record $65 billion in 2012. As the Florida Chamber Foundation said in a 2013 report, "Made for Trade," the Sunshine State "could be at the crossroads of vital north/south and east/west trade lanes in some of the world's most heavily traveled waters and airspace."[53] Central Florida leadership is exploring how to benefit the regional economy in this statewide effort.

Providing leadership on state and federal legislative issues is an additional and crucial component of economic development. In May 2014, a Central Florida delegation of seventy top business and community leaders traveled to Washington to seek increased support for the region's modeling, simula-

tion, and training industry (MS&T).  These leaders spoke with thirteen members of the U.S. House of Representatives from Central Florida and the Tampa Bay area and both of Florida's U.S. senators about the importance of the MS&T industry. This type of Super Region support is evidence of the expanding collaborative and cooperative leadership that has become a real asset to Central Florida in the effort to marshal its clout and voice more clearly and effectively.



**County Government Revenues**

- ■ Property Tax
- ■ Sales/Other Taxes
- ■ Shared Revenues/Misc
- ■ Services/Fees

## TAXES

Florida does not have income tax; public budgets are funded primarily through property taxes, sales and business taxes, and revenues for services.

## A SUMMARY OF 2013-14 REVENUE SOURCES FOR ORANGE, OSCEOLA, SEMINOLE, AND LAKE COUNTIES

Along with property taxes, county governments have the option to impose eight local discretionary sales surtaxes.[54]  The discretionary sales surtax is based on the rate in the county where the taxable goods or services are either sold or delivered, and is levied in addition to the state sales and use tax of 6 percent. The surtax does not apply to a sales price above $5,000 on any item of tangible personal property, although the cap does not apply to the sale of any service, rental of real property, or transient rental.

| Revenue category (in millions $) | County (with population, in millions) | | | | |
|---|---|---|---|---|---|
| Revenue | Orange 1,185.5 | Lake 307.0 | Seminole 427.0 | Osceola 284.0 | MSA total |
| Property tax | 565.0 | 73.7 | 152.9 | 138.9 | 930.5 |
| Sales/other taxes | 300.3 | 34.3 | 26.4 | 88.6 | 449.6 |
| Shared revenues/miscella-neous | 285.8 | 50.0 | 68.4 | 60.9 | 465.1 |
| Services/fees | 607.1 | 46.5 | 127.2 | 106.0 | 886.8 |
| Total revenue | 1758.2 | 204.5 | 374.9 | 394.4 | 2732.0 |
| | | | | | |
| County revenue per capita | 1.5 | 0.7 | 0.9 | 1.4 | 1.2 |

**Revenue Sources, by County, 2013-14.  Source: Revenue departments of the respective counties.**

The eight discretionary sales surtaxes and their maximum rates are:

1. charter county and regional transportation system, 1.0 percent
2. emergency fire and rescue services and facilities, 1.0 percent
3. local government infrastructure, 1.0 percent
4. small county, 1.0 percent
5. indigent care and trauma center, 0.5 percent
6. county public hospital, 0.5 percent
7. school capital outlay, 0.5 percent
8. voter-approved indigent care, 1.0 percent

Section 212.055 of the Florida Statues further provides caps on the combined rates.  The maximum discretionary sales surtax that any county can levy depends on the county's eligibility.  Currently, the highest surtax imposed in several counties is 1.5 percent.[55] However, the theoretical maximum combined rate ranges between 2.0 percent and 3.5 percent, depending on the specific situation in each individual county.[56] Orlando mayor Dyer has stated, "State-imposed revenue caps will cripple our ability to keep up with the demands of public safety and other vital city services."  This thorny issue will ultimately need to be addressed in the Florida Constitution and the Florida Statutes.


## TRANSPORTATION

One of the three "Source Dilemmas" identified in the Central Florida Partnership Values Study was the need for a regional transportation system. Nearly 80 percent of the participants in a survey for that study expressed the view that investing in such a system was a priority.[57] Some suggested areas of emphasis were maintenance, public rail and bus, expansion of the local road network, and enhancement of biking and pedestrian trails.

Ongoing and dramatic population growth resulting in a net gain of nearly ninety people a day in the four-county region over the last forty years demands significant attention to transportation. For one thing, an improved transportation infrastructure is crucial to growth in Central Florida.  SunRail, the new thirty-two-mile commuter rail system, is a critical component in addressing current and future community transportation needs. The area leadership fought long and hard to get it. After many failed attempts on the state and federal levels, Central Florida launched SunRail on April 30, 2014.

**Buddy Dyer, Orlando mayor, and others have been strong advocates of local commuter rail.**
**Source: City of Orlando; http://www.cityoforlando.net/transportation-planning. Accessed June 15, 2015.**

Thanks to collaboration among the Florida Department of Transportation Districts, Central Florida Commuter Rail Commission, Congress of Regional Leadership, Central Florida Partnership, and numerous business and civic leaders, the train's twelve stations are the first installment in an overall transportation plan that includes immediate and ongoing efforts to expand the SunRail system, build the Wekiva Parkway (which would ease congestion on Metro Orlando's north side), and overhaul the region's most traveled highway, Interstate 4. The combined process promises to be an ordeal locally, but the results should be a welcomed transformation for residents and visitors alike.

## "THE JUST AND WELL-ORDERED": THE REALM OF POLITICAL AND CIVIC LIFE

People can be slave-ships in shoes.
—Zora Neale Hurston[58]

The Endowment of "The Just and Well-Ordered" is the realm of political and civic life. The Essential Subject that quickly emerged in the interviews with area leading voices was racism, which was sometimes referred to more pointedly as "white privilege." Orlando is not widely known for this issue. It is not Selma or Birmingham or Atlanta. There have not been as many public battles there as there have been in other Southern cities, but it is clear that there have been gross injustices.

In addition to the subject of racism, the electorate, public safety, and laws round out this Endowment as it relates to Metro Orlando.

### RACISM

Justice includes fairness and equity in all aspects of society: governance, leadership, safety, and community matters. The right to vote and participate in elections is a critical component of justice in a democracy. Although ratification in 1870 of the Fifteenth Amendment to the U.S. Constitution ensured that "race, color, or previous condition of servitude" would not prohibit citizens from voting, it was not until the Voting Rights Act of 1965 that the tactics embedded to make voting difficult, or even

impossible for some citizens, were finally removed. Some of those tactics were deadly. In 1920, July Perry, an African American, was shot and lynched in downtown Orlando after trying to vote. Another black man escaped with his life, but whites were so enraged that an entire African American section of Ocoee, a town just west of Orlando, was completely destroyed during what became known as the Ocoee Massacre.[59]

In 1948, a group of four young African American men were wrongly accused of raping a white girl in Lake County. Shortly after the accusation, one of the four was pursued and lynched. The county sheriff was present at the lynching. The surviving three suspects were arrested, and two of them were sentenced to death. Future Supreme Court justice Thurgood Marshall and a team of lawyers from the National Association for the Advancement of Colored People took the case, and had the verdict over-turned. Later, while the two men were in his custody, the sheriff shot both of them, murdering one in cold blood. But the other lived to tell the tale of how the lawman had tried to stage an "attempted escape" before he began to shoot. Evidence introduced later would corroborate the young man's story, but the sheriff was never prosecuted. The four young men who were originally accused have been me-morialized in the more gruesome chapters of Central Florida's history as the Groveland Four.[60]

The Ku Klux Klan publicly marched in Orlando as recently as 1995.[61] Known Klansmen have won public office, and there have been numerous instances of voter intimidation by the Klan and other racist groups. The most recent charges of racially motivated voter intimidation were lodged in relation to the 2000 presidential election.[62]
The legacy of these overt deadly crimes and the sequence of oppressive Jim Crow laws is a profound distrust of whites by African Americans. In 2013, the Polis Institute (a nonprofit organization focusing on distressed urban neighborhoods that was founded by the present author) conducted the largest pri-vately funded survey in Orlando's history. Over 1,500 people were interviewed in a historically African American section of town, and eight public forums were held, which were attended by over 120 people. Distrust of whites was cited as a primary concern in all eight of the forums and showed up repeatedly in the surveys themselves, even though there was no question that directly addressed that topic.[63]

"High levels of poverty and unemployment are fixtures within many black and Hispanic neighborhoods, while [Orange County's] wealthiest areas are almost exclusively white," writes Mark Soskin, a UCF professor who researched the income disparities that persist between white and non-white communi-ties. The neighborhoods in the top quintile in terms of income are all predominantly white, some over-whelmingly so. And of the bottom quintile, 65 percent are majority black, 20 percent majority Hispanic, and 15 percent majority white. "It reflects a three-class society," Soskin says, "where two of those three classes seem to have very little chance of living the American Dream."[64]

## ELECTORATE

Central Florida often plays a pivotal role in national and statewide electoral politics. Florida is a legiti-mate swing state because no political party consistently dominates the vote statewide. The I-4 Corridor, which stretches 132 miles from Tampa, through Orlando, to Daytona Beach, is often viewed as a "tip-ping point" in both statewide and national elections.[65] This borderland of political opinion is populated by roughly equal numbers of Democrats and Republicans and is recognized as the point of confluence between the conservative northern portion of the state, which votes predominately Republican, and the liberal southern portion, predominately Democratic.[66] Typically, as goes the I-4 Corridor, so goes the state. Sometimes, that means so goes the nation, as exemplified by the "hanging chad" election of 2000, which the U.S. Supreme Court decided in George W. Bush's favor following an extremely close popular-vote outcome in Florida.

Orange County has over 700,000 registered voters, with approximately 42 percent registered as Dem-ocrats and 29 percent as Republicans. The critical factor, however, is the 19 percent of registered voters with no listed party affiliation—.[67] High percentages of independent voters are found throughout the four-county region: Lake County, 19 percent; Osceola County, 29 percent; Seminole County, 24 percent.

Overall, more than 300,000 residents of Metro Orlando, over 25 percent of the registered voters in the region, indicate no affiliation with any political party.  Since, by state statute, Florida primaries are "closed," these independents do not have the opportunity to register their preferences until the general elections, which in close contests between the two major parties' candidates makes the independents the determining swing voters.

In Metro Orlando as a whole, 39 percent of registered voters self-identify as Democrats and 33 percent as Republicans; 2 percent are registered with another party.  Democrats are the majority party in Orange and Osceola Counties, while Republicans claim majority status in Lake and Seminole.  Orange County lists more than 16,000 registered voters affiliated with other minor parties, Lake County in excess of 8,000, Seminole County over 7,540, and Osceola almost 4,000.[68] Thus, the region enumerates almost 40,000 registered voters with minor party affiliation.  Based on 2010 U.S. Census data on voting-age adults, approximately 81 percent of eligible individuals in the region are registered to vote.[69]

## PUBLIC SAFETY

The greatest single regional priority identified in a recent study of Central Floridians' values was "reducing crime and making neighborhoods safer."[70] People want to feel safe, and many in Metro Orlando do not feel that the area is safe enough. Again, it is likely that the dramatic and ongoing increase in population contributes to this—people tend to feel safer around those they know, and if that group is in constant flux, then it is not hard to understand the findings on perceived safety.
In 2012, the violent crime rate in Orlando was 458.7, compared to a U.S. average of 214.0 for cities.[71] Sixty percent of the nonviolent crimes were thefts, 20 percent were burglaries, 9 percent assaults, 7 percent auto thefts, 3 percent robberies, and 1 percent other kinds of crimes.[72] The violent crime rate in Orlando dropped 7 percent in 2013.

Orlando shares in a statewide trend toward less crime.  Florida's crime rate dropped to a forty-three-year low in 2013, good news for which Florida Department of Law Enforcement (FDLE) commissioner Gerald Bailey credits "Florida's dedicated law enforcement professionals for making this a better place to live."[73] The biggest local reduction in reported crime  was in Lake County, where the crime rate dropped 7.8 percent. Osceola County enjoyed a 6.4 percent reduction, while the Orange County crime rate dropped 1.3 percent. The reductions were modest in unincorporated Orange County compared to the 13.1 percent increase in crime in the city of Apopka. According to the *Orlando Sentinel*, FDLE statistics also reflected an overall increase in Seminole County crime by 6.6 percent, with the biggest rate spikes reported for the cities of Altamonte Springs and Sanford.

Local governments have leveraged improved technology to strengthened police efforts.  In his 2013 State of the City speech, Mayor Dyer said that in 2012, "police [surveillance] cameras in Downtown, Lake Eola, Parramore, and Metrowest allowed police officers to intercede in nearly 800 crimes and make more than 100 arrests."[74]

In its 2013 report *Community Health Needs Assessment*, the Central Florida Community Benefit Collaboration wrote that the Florida Department of Children and Families reported that child abuse rates increased [in 2010] across the three counties to a rate of 12 cases/1,000 persons in Orange County, 16.5 cases/1,000 persons in Osceola County, and 7.2 cases/1,000 persons in Seminole County.  Orange and Seminole Counties [were] in the top 50th percentile statewide for child abuse for children aged 5-11; Osceola County [was] between the 50th and 25th percentiles for this measure. The age-adjusted death rate due to motor vehicle collisions decreased in all three counties between 2009 and 2010.  All three counties [were] below the Healthy People 2020 target of 12.4/100,000 persons.[75]

## LAWS

Twenty-two states, including Florida, have "stand-your-ground" laws, under which individuals have a right to respond with deadly force when they perceive that they are under assault or are in imminent danger of assault. Stand-your-ground laws were once seen as a way for citizens to protect themselves and their property, but the law has become a cover for aggressive vigilantism whose outcome is sometimes fatal.  Self-defense claims tripled after the law was adopted in Florida in 2005.[76] Miami police chief John F. Timoney called the law unnecessary and dangerous in that "whether it's trick-or-treaters, or kids playing in the yard of someone who doesn't want them there, or some drunk guy stumbling into the wrong house, you're encouraging people to possibly use deadly physical force where it shouldn't be used."[77]

Following the nationally publicized shooting death of Sanford resident Trayvon Martin on February 26, 2012, a Florida attorneys' association launched an investigation into the law and recommended its repeal.  Justifiable homicides have reportedly increased by 8 percent in states with stand-your-ground laws.[78] Anecdotal evidence suggests that the law also seems to be easier to invoke if the defendant is white. Seventeen percent of the time, if a white person shoots a black person and appeals to this law as the rationale, the shooting is deemed justifiable. When blacks invoke the law, they are successful only 1 percent of the time. "In non-stand-your-ground states, the shooting of a black person by a white is found justified approximately nine percent of the time."[79]

The confusingly named "right-to-work" laws prohibit a labor union from requiring employees to be members of a union that has bargaining rights in their workplace. These laws are part of Florida's state constitution and are enforced alongside other pro-business measures such as the absence of a personal income tax and minimal regulation of development. In 2013, Governor Rick Scott made the state's pro-business climate all the more clear by putting the tagline "Florida, open for business" on the "Welcome to Florida" signage at the state line.  Studies on the efficacy of "right-to-work" laws in boosting economic output have had mixed findings.  While it is generally agreed that the laws do facilitate increases in economic output, it is difficult to isolate their specific effectiveness because they are generally just one component in a suite of pro-business statutes.[80]

One potential byproduct of right-to-work laws is that employees who opt out of the collective bargaining process may still benefit from any wins gained by the union for its members, and are thus encouraged to be "free riders."  But some critics  suggest that "closed shops," with their requirement of union membership—and, concomitantly, the payment of union dues—restrict free association.

## "THE BEAUTIFUL": THE REALM OF AESTHETICS

Art, which espouses Beauty, is the ultimate in, and of, Freedom.
—Jack Kerouac[81]

"Beauty and aesthetics are among the most important factors in community satisfaction."[82]
 And people who are satisfied with their community tend to more thoroughly embrace it and deepen their roots in its soil.  Orlando, in spite of its "City Beautiful" tagline, is not readily known for its beauty, culture, or art—or for permanence.  Rather, it is known as a transient place, where people visit, go to school, or build a resumé, but certainly not a place to put down deep roots.  It is known for theme parks, family vacations, urban sprawl, outlet and strip malls, and big churches. But, as the recent campaign of the Metro Orlando Economic Development Commission puts it, "Orlando, you don't know the half of it."  At least a fraction of that unknown half is revealed through the city's built environment, cultural offerings, and cuisine.

## BUILT ENVIRONMENT

Since the dawn of the twenty-first century, Orlando has regained its position as the leader of regional planning efforts through its Community Venues projects (intended to make Orlando a suitable venue for top-tier events), commuter rail agreements, and its environmental action agenda known as Green Works. In 2009, the recently annexed Lake Nona area in southeast Orange County welcomed the Burnham Institute for Medical Research, and "Medical City" was formally birthed among the wide-open spaces.  In the urban column, by 2014 a comprehensive leadership council had been launched called Project DTO (for "downtown Orlando") to reimagine and redevelop the urban core of the region. Nothing comparable, from a planning standpoint, is evident in any of the four counties of the MSA.

The Project DTO council consists of seventy leaders, and is convened by the City of Orlando to envision and plan what the next decade of Orlando's story will bring, particularly within the downtown core. Given the professional and civic positions and significant influence of this group, its actions and ideas will have a wide-reaching effect on the region. Whit Blanton, a planning consultant on the project, summarized the seven most prominent ideas articulated in the initial reports from its nine committees:

- Establish an identity.
- Create alternatives to driving.
- Creatively utilize space under I-4.
- Strengthen connections between six "Main Street Districts," downtown, and neighborhoods.
- Develop a well-known, large meeting space.
- Help existing churches and nonprofits work together.
- Embrace diversity.

*Travel and Leisure Ma*gazine annually asks its nearly 1 million readers[83] to rate thirty-five U.S. cities in eight categories. While the poll is not scientific, the magazine, published since the 1930s, has not only a large readership, but a focus near and dear to Orlando's economic heart. Since the magazine disaggregates the resident and visitor responses, the conclusions provide an interesting anecdotal lens.  Ironically, in 2013 the City Beautiful ranked last among the thirty-five cities in terms of culture and being proud of itself, and almost last in terms of public parks, public transportation, and pedestrian-friendliness.[84] These self-reported opinions regarding pedestrian- friendliness mirror the findings of National Complete Streets Coalition research that deemed Orlando the country's most dangerous city for pedestrians.[85]

A city's built environment not only affects safety, it offers one of the most readily accessible views into the aesthetic of a place. The aesthetic of Orlando is clearly shaped by its minimally planned, loosely regulated, "build it now" approach.  In a two-mile drive along Orange Blossom Trail, the busiest surface street in the region, one will pass gated communities; manufacturing, retail, and fast-food shops, "gentlemen's clubs," weekly rental motels, single-family homes, and numerous small businesses.[86] Metro Orlando attracts and permits development that can happen quickly and cheaply, paving the way for tract housing developments, chain retailers and restaurants, and strip malls.

Yet in spite of this haphazard development norm, there are many beautifully built places in Metro Orlando. There are historic neighborhoods with large live oaks draped with Spanish moss. Modern buildings dot the landscape, such as the luxuriously glass-clad Dr. Phillips Performing Arts Center currently under construction across from city hall.  A wider-lens perspective brings into focus the LEED Gold Certified Burke Hogue Mills building, the Ginsburg Tower, the Coleman Center for the Arts, and Frank Lloyd Wright's creations at Florida Southern College. There are exquisite renovations, such as the Spanish farmhouse known as Casa Feliz, and national historic landmarks, including the Bok Tower and Gardens designed by Frederick Law Olmsted. There are massive civic buildings like the 7-million-square-foot Orange County Convention Center and huge shrines exemplified by the Basilica of Mary, Queen of the Universe.

## CULTURE

Of the 366 metropolitan areas in the U.S. Census Bureau's American Community Survey, Orlando ranks forty-ninth on a list of "most artistic cities," as measured by the number of professional artists per 1,000 residents. Orlando reports having nearly one artist for every 1,000 people (0.901/1,000), which works out to a total of 1,935 professional artists. This tops the average ratio for a metropolitan area, 0.705/1,000, but is well below the figures for the top three cities: Pocatello, Idaho (6.64), Santa Fe, New Mexico (5.62), and Portland, Maine (5.31).[87] One may find the resident artists showcasing their work in a low-key way at one of the local farmers' markets, coffee shops, and restaurants, the City Arts Factory, or Faith Arts Village. Annual arts festivals such the Winter Park Sidewalk Art Festival (which dates to the 1950s and is considered in some circles to be one of America's best juried fine arts fairs) and the nationally well-regarded Mount Dora Arts Festival provide larger venues, albeit brief arts opportunities, on the year-round entertainment landscape. More permanent venues include the Mennello Museum of American Art, which celebrated its fifteenth anniversary in 2014, and the Orlando Museum of Art, which celebrated its ninetieth anniversary.

United Arts (UA) of Central Florida supports artistic and cultural organizations in Metro Orlando through annual giving campaigns and grants. A glance at the top fifteen recipients of its funding (see "Top Fifteen United Arts-Supported Organizations," Appendices) reveals little emphasis on film and emerging art, however. It is difficult to determine if that reflects a clear prioritization by UA or is attributable to some other factor. The Enzian Theater is the premier local venue for independent film, the only film-focused entity to make the funding list. The City Arts Factory is a downtown Orlando venue for emerging artists. Artists in the downtown district claim that there is a clear bias against their medium (graffiti-influenced urban art) and allege that the low levels of funding from UA reflect that bias. Several of these artists have banded together as the "B-side artists" to differentiate themselves from the wealthier arts scene in Winter Park and other more affluent areas.[88]

Nevertheless, Orlando has taken a more supportive stance toward the urban art scene. As one observer has written, "We love how colorful Orlando has become. From brightly decorated utility boxes to city-commissioned murals at bus stops to permission walls where local artists are invited to tag and paint as long as they ask first, street art has turned parts of our formerly dull (and sometimes plain old ugly) streetscape into bright, visually intriguing panoramas—places we want to celebrate rather than hide."[89]

The most visible event in 2014 relative to Orlando's cultural world was the highly anticipated opening of the latest landmark in the built environment, the long-awaited $500 million Dr. Phillips Center for the Performing Arts, which opened in the fall with the first in a series of Broadway plays and the nationally acclaimed Jazz Roots concert series. Ballet is available locally, and the Orlando Opera Company collaborates with the Orlando Philharmonic Orchestra, which awaits the building of its own new home. The Mad Cow Theatre is also a popular venue, and the Orlando Shakespeare Theater has steadily increased its offerings, capacity, and quality over the past fifteen years to become one of the better-known regional playhouses of its type. The downtown Amway Arena offers a steady stream of professional sports events and sold-out concerts by world-renowned artists.

## CUISINE

There was a 197 percent increase in the number of food trucks nationally from 2011 to 2013. Some unexpected cities are leading the boom in the mobile restaurant industry,[90] and, according to a recent estimate by the U.S. Census Bureau, Orlando tops that list with more food trucks per 100,000 people than any other major U.S. city: 37. 67. (In second place is Orlando's neighbor to the south, Miami, with 33.83/100,000.[91] (For a list of the top U.S. food truck cities, see "Food Trucks per Capita," Appendices.) Whether or not this phenomenon appeals to one's sense of aesthetics or one's appetite often depends on the food truck itself. For some, however, food trucks are not a positive sign of business growth. Instead, they represent a cheap, noisy, transient health hazard that, while admittedly enjoying popular

momentum in a tourist-rich environment, may ultimately offer more risks than rewards from a community standpoint.  Nevertheless, like many trends in Orlando, the food truck movement can be traced to a single person expressing an optimistic opinion. Mark Baratelli kicked things off with his first Food Truck Bazaar, in April 2011. [92] His enthusiasm has now been both affirmed and challenged by Disney's own foray into the genre: It will soon offer a "permanent" food truck park in downtown Disney World.[93]

Orlando's only Fortune 500 company is Darden Restaurants, which has several brands including Olive Garden, Seasons 52, and Longhorn Steakhouse, all known for their reliable fare more than their inventiveness. Most major restaurant chains have representation in Orlando, and the theme parks have started to create some of their own brand-name restaurants that have received critical acclaim, such as Jiko in the Animal Kingdom and Mythos in Universal Studios. Additionally, there are numerous locally owned and operated restaurants vying for recognition and various Foodie Awards (given to distinctive Orlando-area restaurants), such as Nile Ethiopian (African), Nikki's Place (soul food), 4 Rivers Smokehouse (barbeque), Prato (bar menu), the Mason Jar (breakfast), Cask & Larder (brunch), Villa de Flora (buffet), and B&B Junction (burger).[94]

## "THE TRUE": THE REALM OF KNOWLEDGE

Our greatest natural resource is the minds of our children.
—Walt Disney (inscribed on a wall at EPCOT Center)

## CHILDREN'S EDUCATION

| Metro Orlando Public Schools (2012–13) | | | | |
|---|---|---|---|---|
| County | "A" schools | "F" schools | Recipients of free or reduced-price lunch | Minority students |
| Orange | 42.6% | 4.9% | 64.8% | 71.2% |
| Seminole | 61.3% | 1.6% | 48.9% | 46.0% |
| Osceola | 27.8% | 3.7% | 68.4% | 73.3% |
| Lake | 12.5% | 10.4% | 62.4% | 42.8% |
| MSA | 39.7% | 4.9% | 61.1% | 58.3% |
| State | 35.3% | 5.8% | 65.0% | 59.0% |

Source: Florida Department of Education

While Metro Orlando's education system is full of potential, with 344 public schools and 520 private schools, coping with a rapidly growing student population has proven exceptionally difficult.  Across Metro Orlando, leaders, educators, and residents are constantly tweaking long-standing practices and testing new approaches to education, some of which are driven by state and federal mandates. Anticipating the needs of future student populations, improving existing schools in terms of both structure and curriculum, building new schools in previously undeveloped areas of town, and meeting the individual needs of culturally diverse student bodies are all recurrent agenda items for school leaders.

Orange County Public Schools (OCPS) is the largest system in Metro Orlando, enrolling over half of the students in the four-county area. It is therefore instructive to look at its educational history as a bellwether for Metro Orlando as a whole. And looking at OCPS's track record of equitably distributing educational services is particularly instructive. In 1955, the U.S. Supreme Court handed down its decision in *Griffin v. County School Board of Prince Edward County* that public school systems must begin the process of desegregation "with all deliberate speed" (349 U.S. 294).  However, OCPS made no attempt to comply, and even continued to increase the number of racially segregated schools.

Finally, in March 1962, eight black families formally requested that the Orange County School Board begin to integrate the local schools. When the request was denied, the families sued the school board the following month.  Orange County subsequently integrated its first school in September 1962, kicking off a tactical struggle that has lasted into this century. As of April 2003, when the school board voted to pursue unitary status and free the system of court-ordered supervision, 34 of 150 public schools

were predominately black. The system's enrollment stood at approximately 159,000 students, 41 percent of whom were white, 28 percent black, and 26 percent Hispanic.[95]

Orange County has thus trod a long road to school integration, achieving unitary status[96] from the federal courts only in 2010.[97] Barbara Jenkins, OCPS superintendent, explained that much of the delay was due to

| | Public | Average size | Private | Average size | Private religious |
|---|---|---|---|---|---|
| Orange | 178 | 902 | 286 | 80 | 65% |
| Seminole | 62 | 1023 | 112 | 78 | 53% |
| Osceola | 58 | 970 | 58 | 73 | 71% |
| Lake | 46 | 845 | 64 | 49 | 86% |
| MSA | 344 | 935 | 520 | 75 | 64% |

**Metro Orlando Public vs. Private Schools**

Source: Private School Review, "Orlando Schools" (privateschoolreview.com).

a lack of diligence in applying for, and pursuing, the status. She admitted that the quest was protracted, but maintained that, overall, Orange County experienced a comparatively smooth integration process. In addition to emerging from the negativity of the legal quagmire, on the strictly positive side, OCPS recently celebrated having been named one of two finalists for the 2014 Broad Prize for urban education, a first for the system. According to the Broad Foundation, "Seventy-five urban school districts are identified each year as eligible candidates for the Broad Prize, based on size, low-income enrollment, minority enrollment, and urban environment."[98]

These hard-won battles to narrow achievement gaps and avoid segregation could be nullified as Orlando returns to a neighborhood school structure without busing. The dilemma of documented advantages of community schools manifesting themselves simultaneously with the acknowledged negatives of de facto segregation potentially becomes a very real conundrum unless the neighborhoods they serve are themselves mixed in terms of ethnicity, income, and socioeconomic status.

An interesting philosophical case in point is the Nap Ford Community School, a charter school currently serving children in prekindergarten through fifth grade and situated in the low-income neighborhood of Parramore. When busing started, Parramore's local school was closed down and the students' caregivers, in particular, immediately lost the ability to play an active part in their children's schools because of the distances that were now involved. Furthermore, in the eyes of many, Nap Ford's closure marked the demise of the local rallying point for community cohesiveness and involvement. The school's principal, Jennifer Porter Smith, expresses the view that "the method used to integrate schools was not the best for communities. Schools anchor the community."[99]

"Schools anchoring the community" is a construct that is being field-tested at the Evans Community School (ECS), the first of its kind in Florida. Located in Pine Hills, another low-income neighborhood, this high school is modeled after Community Learning Schools in New York. In addition to academics, ECS provides the life services students need, such as medical, dental, and mental health care, as well as tutoring, skills training, and a food pantry. In meeting these kinds of fundamental living needs that, if otherwise unmet, would preoccupy and distract the student, the school is concomitantly facilitating the student's capacity to focus better on academic pursuits. Additionally, the community school's long-term goal is to leverage these services on behalf of the entire community.

While about 90 percent of Metro Orlando children receive a public education, there are still many more private schools in the area than public schools.[100] Most of these schools are quite small relative to their public school counterparts and tend to be religiously affiliated. There are also many early childhood education programs that are private; these programs account for a large proportion of the private schools as a whole. Three percent of students are home schooled, some of whom participate in hybrid school options like Florida Virtual School, which offers online classes to public, private, and home-schooled students.

Among educators in all settings, there is a strong focus on early childhood education. The Parramore Kidz Zone, a local organization that has developed many programs based on specific gaps in local children's school readiness, is one adjunct solution currently being implemented. The Kidz Zone initiated

| Metro Orlando High Schools | | | | |
|---|---|---|---|---|
| County | 2009 high school graduation rate | 2013 rate | Average SAT scores | Proportion of students attending public college in Florida |
| Orange | 67.4% | 75.9% | 1443 | 51.2% |
| Seminole | 75.4% | 83.8% | 1548 | 62.0% |
| Osceola | 71.9% | 78.1% | 1365 | 41.3% |
| Lake | 66.1% | 78.3% | 1465 | 42.5% |
| U.S. | 73.4% ('06) 78.2% ('10) | | 1498 | 52.0% (state) |

See "Education Statistics" (Appendices) for more detail and sources.

the Baby Institute, hosted at the Nap Ford Community School; the institute is a nine-week program in which parents learn how to be their child's first teacher. Such programs, partnering with the schools themselves, provide some of the most encouraging signs of improvement in the prospects for children's long-term success.

However, despite growing community awareness and active partnerships, enormous challenges remain as a result of the area's exponential population growth over a very short period of time. According to Superintendent Jenkins, "Phenomenal growth in Central Florida in the late '90s to early 2000s caused the need for five or six schools to be opened in a single year, compared to one or two in an average year."[101] Orange County additionally remains a magnet to a very diverse group of students, many of whom do not speak English at all when they arrive at school and many more of whom speak English as a second language. While OCPS always celebrates the inherent benefits of diversity, it also laments the ongoing struggle to deliver the required additional support that must somehow be supplied with limited funding.

To increase funding, OCPS appealed to Orange County residents to vote in the 2015 elections to renew two school-funding levies: the half-penny sales tax and a one-mill (i.e., one-tenth of a cent) property tax. The half-penny sales tax was originally approved in 2002 specifically to help finance construction and renovation of school buildings; without the voters' express reauthorization, it would lapse. Thirty-nine campuses were in need of such attention in early 2015.

## HIGHER EDUCATION

An increasingly youthful regional demographic overall and a growing K-12 population suggest that institutions of higher education are and will continue to be in demand. Central Florida has two that are seizing this opportunity in highly visible ways. Valencia College (formerly Valencia Community College) has gained both national attention and local loyalty. Committed to providing an education for those students who are focused on gaining a career foothold or enhancing their current status in the work force, Valencia prides itself on bridging gaps. The tuition structure enables students of modest financial means to enroll; the open enrollment policy circumvents restrictive grade-point average requirements; the demographic diversity ensures that people of all ages, stages of life, and career experiences can find a niche at one of Valencia's seven locations; its partnership with UCF means that students are guaranteed a seamless transition to a traditional four-year university setting if they so desire. In 2010, while the two-year public college graduation rate was 20.4 percent nationally, Valencia enjoyed a 40 percent graduation rate.[102] Further encouraging student success, Valencia brokered an agreement with UCF for automatic admittance for Valencia graduates, proving the university's faith in the quality of Valencia matriculates.[103] The college also evinces strong ties with the surrounding community, offering degree programs that directly link with needed jobs at specific Florida companies and participating in regional efforts that will affect Central Florida as a whole, such as the initial planning of Medical City.[104]

Many Valencia students do transfer to UCF. Former Florida governor Jeb Bush once wrote, "I believe [university president] John Hitt and Walt Disney have done more to transform Central Florida into a vibrant, dynamic place than any two people in the region's history."[105] Having opened in 1968, within a year of Valencia's founding, this more traditional four-year institution ranked fifth in Florida in enrollment and 113th in the nation when Hitt became president in 1992. By 1998 UCF had an enrollment of just over 30,000 students,[106] a total that soared to over 60,000 in 2013[107]—nearly doubling in just fifteen

years and making the university the second-largest four-year postsecondary institution in the nation.

UCF is working to become a major research institution and tries to leverage its research goals to help benefit the local community. The university was a major part of the conception and development of Lake Nona Medical City,[108] in which the university has opened its new college of medicine. If the Medical City progresses as planned, it could approach the impact of WDW by increasing health-related business activity, medical tourism, and research study and funding. These increases would also boost the housing industry, public transportation, road construction, and other infrastructure necessities.

The social work program at UCF has also been positioned to create local benefit by working closely with the Department of Children and Families to obtain federal matching grants for training, which would enable students to receive master's degrees tuition-free in exchange for an equal time spent employed at DCF following graduation. This potentially could affect Florida's entire child welfare system.

The UCF School of Public Administration assists many small, private, nonprofit organizations in the area in expanding their capability and capacity, which likewise has had a broad impact on Central Florida over time. And the university is also considering building a campus in downtown Orlando in the Creative Village, the planned mixed-use community. The idea is to attract digital companies and educational institutions that will complement the Creative Village's businesses, schools, apartments, parks, and shopping.[109]

## "THE GOOD": THE REALM OF SOCIAL MORES AND ETHICS

I fell in love with the neighborhood.
 – Harris Rosen[110]

The Endowment of "The Good" is the realm of morality—that which we ought to do to care for one another. This Endowment deals with charitable and religious institutions, foundations, and both public and private entities that are working to advance the common good. But this Endowment, more so than any other except perhaps "The Beautiful," is not primarily the domain of the professional. "The Good" is the Endowment that calls us all to action—to "'love our neighbor as ourselves."

The Essential Subjects that were determined to be related to this Endowment by the Orlando Profile Research Team  are "Responsibilities" (which social sector is responsible for what), the "Culture of Service" (how we are addressing human need in general), and "Issues of Concern" (primary issues to which the community is responding).

## RESPONSIBILITIES

Responsibility, in general, is an ethical concept. So while the responsibilities of a given social sector fall under the purview of different Endowments, responsibility itself falls under the domain of "The Good." According to the Central Florida Partnership Values Study, Central Florida has three "source dilemmas" that demand attention if the region is to improve its global competitiveness and quality of life:

- agreeing on "Who we are" (discussed in "The Sustainable: Identity")
- understanding our corporate, civic, and individual responsibilities
- investing in a regional transportation system (discussed in "The Prosperous: Transportation")[111]

The primary issue facing the region is the low-wage work force that undergirds its service sector economy. Addressing the source dilemmas would help address this issue. For instance, agreeing on "who we are" would enhance the region's capacity to lure higher-wage industries to the area. Some low-wage service sector employees could then aspire to higher-paying jobs in these industries without having

to leave the area. An enhanced transportation system would similarly attract investment in the region while simultaneously making jobs, amenities, and entertainment more accessible. But in a context in which low-wage workers are often unable to afford health care, can lose their housing, or lack the funds to purchase food, the question remains: Whose responsibility is it to address these source dilemmas and all of the other related issues?

The Central Florida Partnership Values Study revealed that people in Central Florida believe that it is the private sector's job to provide adequate economic opportunity for the region's low-wage workers. A case study in private sector responsibility to low-wage earners was conducted by the Polis Institute in 2013 on behalf of a fast-growing Orlando company seeking better ways to serve its employees. Generally speaking, the employees were satisfied with their jobs but were frustrated by the low wages and limited opportunity for growth. A slight majority expressed concern that they did not have enough food, and a significant majority said they did not have adequate health care. But an astounding 97 percent expressed the view that they would prefer to handle those issues through their own effort and income rather than through direct relief.[112]

The fact that such an overwhelming majority of these employees preferred to be able to provide for themselves communicates something important about the nature of responsibility. Responsibility, in an ultimate sense, typically falls on each person as an individual. The people in the study seemed not only to understand that but to welcome it. What they clearly communicated to their employer was that they desired wages that would allow them to meet their basic needs and expected the employer to provide opportunities for that to happen. The employer's response to that finding was that in order to remain competitive in its industry, and thereby to provide *any* jobs, it had to keep wages as low as possible.

So while the private sector has a responsibility to provide a living wage, it is not always able or willing to do that, which means its work force will either have to find additional help in the community or obtain additional or different employment. When people have needs that surpass their own capacity to address them, the public and independent sectors are generally expected to fill the gap. Central Florida has large private and community foundations that supply a great deal of funding to bridge these gaps, but does so at a rate per capita that lags behind that in other large states. According to the Foundation Center, organized charity in Florida is relatively immature, having assets of $1,064 per capita, an amount five times less than the comparable figure for New York.

Central Florida lags behind South Florida in terms of total foundation resources but had two of the top five grant makers in 2013—the Florida Bar Association and Publix Super Markets Charities. Other significant charities include Dr. Phillips Charities, the Elizabeth Morse Genius Foundation, the Winter Park Health Foundation, the Edyth Bush Charitable Foundation, the Chatlos Foundation, and the Central Florida Foundation. Including contributions by foundations and corporations, organized charitable giving in Florida was about $1.28 billion in 2013, slightly more than 10 percent of the $11.14 billion donated by individuals in the state.[114]

## CULTURE OF SERVICE

The Corporation for National and Community Service has ranked Orlando forty-sixth among the fifty-one largest MSAs in the country for the percentage of residents who volunteer.
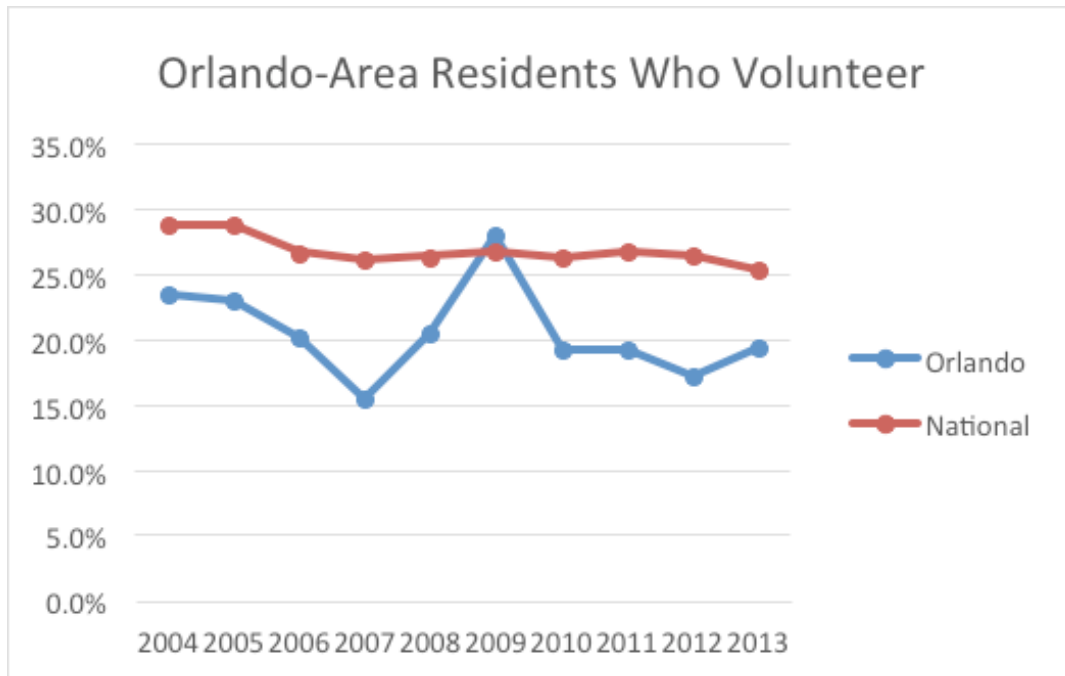


**Source: Corporation for National and Community Service.**

This rate lags the national rate of volunteerism by six percentage points. Since 2004, Orlando has consistently lagged behind by a similar quantity, with the exception of 2009, when it saw a 28.1 percent rate of volunteerism, slightly above the national rate of 26.8 percent.[115]

Religious organizations are the most common source of volunteers in Metro Orlando.[116] Orlando is a Southern city that has been increasingly influenced by an influx of northern U.S. and Latin American immigrants. Like other cities in the South, it has a number of large Christian churches, but, on the whole, the majority of Orlando residents have remained unaffiliated with a church since that statistic was first tracked in 1980. The makeup of the religiously adherent population has become progressively more Catholic and Muslim; Hindu and Buddhist communities have also emerged. The Jewish and Protestant communities have seen the greatest declines since 1980. In 2010 in Metro Orlando, 40.6 percent of the population self-identified as religiously affiliated. These adherents could be found in 1,636 congregations (1 per every 1,305 residents).[117] (See "Religious Adherence," Appendices, for more detailed information.)

Between 2006 and 2009, the Polis Institute conducted a comprehensive research project focused on the "culture of service" in Metro Orlando to evaluate how well human needs were being met. The overarching finding was that Orlando's culture of service was typified by short-term relief efforts that lacked a geographic focus. Thirty-eight hundred nonprofits were inventoried as part of the research, and over 300 of them were directly assessed as to the intent of their programs. Ninety-six percent of the assessed programs were providing direct relief (food, clothing, shelter) or short-term educational programs; 3 percent were focused on community development; 1 percent were focused on systemic change (affecting policy). The single largest area of volunteer involvement was in the distribution of food[118]—a reality that remains true in 2013.[119]

## ISSUES OF CONCERN

As in any metropolitan area, there are many issues related to Metro Orlando's more vulnerable residents about which there is widespread concern. In addition to the issue of a low-wage work force, which has already been discussed, Orlando residents are also concerned about concentrated poverty, homelessness, immigration, human trafficking, and food insecurity. The first two of these are discussed further below.

Poverty is concentrated geographically in Metro Orlando, but few efforts to address poverty are similarly focused. Experts affirm the effectiveness of such geographic focus, as well as engaging existing assets in those areas rather than just focusing on needs. The Polis Institute developed a "Neighborhood Stress Index" to create a baseline for poverty concentration in 2009 and released a series of recommendations that included rallying high-capacity leadership to support asset-based community development (ABCD) with the residents of the 100 distressed neighborhoods that were identified in the area. The ABCD modality stems from an ongoing research project by a Northwestern University-affiliated institute that has chronicled the typical elements of neighborhood-level transformation. The institute's research uncovered two common features: An indigenous asset is most often the source of transformation (where "assets" were defined as the full range of ideas, interests, and resources of a community); and the faith community is usually the primary supporting entity.[120]

There are 507 neighborhoods in Orange and Seminole Counties, and the Polis Institute researchers found 100 of them to be in distress. Stress level was determined by forming a composite index as the average ordinal ranking of income, housing, crime, family structure, and education variables. The index was then divided into five intervals using the Jenks natural breaks algorithm, and assigned labels from "low" to "high" to indicate relative levels of stress. The roughly 20 percent of neighborhoods at the highest level were considered to be in "distress."

Since the release of the Polis Institute's findings in a report, *Seeking the Welfare of the City*, numerous nonprofits, churches, and cross-sector partnerships have emerged to focus on places in distress. The groups are each focused on one or more of the 100 distressed neighborhoods and have specific place-based or asset-based strategies to improve quality of life in these areas. Collectively, these groups have helped reduce crime, increase school readiness, improve incomes, and improve the housing stock. These groups include the Harris Rosen Foundation, which was already active in Tangelo Park, an unincorporated area in Orange County, at the time of the research. Others are Hope Center West, in Washington Shores; LIFT Orlando, in West Lakes; Saint Luke's United Methodist Church, in East Winter Garden; United Global Outreach, in Bithlo; Parramore Kidz Zone; Healthy Central Florida, in Eatonville; and South Street Ministries.

Homelessness is another key issue of concern. While Florida's homeless population is shrinking, the homeless population in Orange County increased by over 50 percent from 2008 to 2013.[121] The U.S. Department of Housing and Urban Development estimates that there are nearly 8,000 chronic (by definition, disabled) and episodic (by definition, in cycle) homeless people in Orange, Osceola, and Seminole Counties, with as many as one-third being children. So severe was the impact of the recent economic downturn on jobs and housing that many families, previously deemed stable but "on the bubble," lost their homes and suddenly found themselves living for extended periods in temporary shelters such as cheap motels. The sheer number of children who were involved forced the county school systems to re-route some of their buses to provide these children with transportation to school, a story told on CBS's *60 Minutes* in March 2011.

Previous local efforts had failed to gain traction despite lofty goals and plans, or perhaps because the loftiness failed to connect with the realities. Following the national coverage, the mayors of Orlando and Orange County joined hands with officials in Osceola and Seminole Counties to appoint the Central Florida Commission on Homelessness (CFCH), a twenty-six-member body representing government, nonprofit organizations, the business community, civic leadership, and faith-based organizations. Freshly invigorated with a serious new sense of political and community empowerment, the CFCH

funded, staffed, and launched an initiative called Impact Homelessness, with the stated goal of working with top leaders and advocates from each sector of the community and rallying them together toward common strategies to fight homelessness in Central Florida.

A key partner and powerful convener is the Central Florida Partnership, which is striving to develop viable recommendations and implement successful strategies that will largely end involuntary homelessness in Central Florida, both chronic and episodic. The initiative's Faith-Based Committee, composed of an unusually broad base of religious affiliations and beliefs, is focused and proactive. The Orlando Solar Bears professional hockey team and the Haleski Foundation are among the community partners that have funded the research and the release of an economic impact study that has quantified the issue in a way that makes it all too real for all community members.[122] The net savings to the taxpayers from implementing a comprehensive, permanent, supportive housing solution are projected to be nearly $150 million over ten years.[123]

Policies are being challenged and revised; unprecedented cooperation among federal, state, and local agencies is being facilitated by entrepreneurial ventures such as iDignity that regularly tackles the challenge of securing appropriate identification for individuals so that they may actually gain access to available resources. At a September 30, 2014, breakfast keynoted by a deputy director of the Bill & Melinda Gates Foundation, Mayor Dyer pledged $1 million in municipal funds to the effort to move 300 people from the streets into permanent supportive housing on an aggressive timeline.

> "Metro Orlando's low-wage work force is its primary challenge to becoming a city that is fully thriving"

Still, it is a formidable challenge to lift greater numbers out of the mire than are falling into it. A general lack of affordable housing can be a precursor to homelessness. In Orange County, nearly 60 percent of renters spend more than 30 percent of their household income on rent. This can create a financial hardship, especially for lower-income tenants, as they then may not have enough money left for food, transportation, or medical expenses.[124] The choices are hard, and all the viable answers are unsatisfactory to some degree. Yet the community resolve seems stalwart and realistic at this point. The rose-colored glasses are gone and the real costs in dollars and lives have become quite clear, as have the cost savings documented in other cities from this paradigm-shifting approach.

## PART III: CONCLUSION

So is Orlando a thriving city? Yes, with certain qualifications. The working definition of *thriving* that was used to develop this profile was this: Thriving is where the sum of past decisions meets the collective hope for the future. This means that for a city to be thriving, it has be cognizant of what its citizenry is hoping for, and must be working to make that hope a reality. Its starting point will be at the sum of its past decisions. Orlando's past decisions have helped build America's leading tourist destination. Walt Disney's decision to build a kingdom there, the Florida state government's decision to give Disney unprecedented autonomy, the way that local governments have reacted to the perceived slight of that deal—have all helped shape Orlando.

These past decisions are now up against a collective hope, that Orlando can come out of the shadow of the Mouse and mature as a city of many talents that exudes a confident and cohesive identity beyond tourism. For the leaders of the area, this will be a huge accomplishment—a swampy outpost turned tourist mecca turned global city is an exciting story in which to be engaged. For the average worker in the city, this hope is expressed in a different way—the desire to provide for oneself and one's loved ones by pursuing genuine opportunity and being equitably compensated for one's efforts.

It seems apparent that many local leaders think that this opportunity already exists for everyone in Orlando. And it seems equally apparent that many of these low-wage workers think that the leaders could not care less about them. But neither of these sentiments is entirely true. What this suggests about

the nature of thriving herein defined is that it necessitates some level of dialogue, understanding, and empathy. The hopes expressed above, admittedly as a gross generalization, are not mutually exclusive. On the contrary, they point the same way but are merely described in different terms.

The absence of thriving is revealed in blind spots. If a city is aware of and working to address its problems and maximize its opportunities in constructive and equitable ways, then it is thriving. Thriving is much more than a static description or inventory of a city's resources, accomplishments, and failures. Thriving is dynamic. It's all about decisions—how those decisions are being made and in which direction they lead, the pivotal decisions at the intersection of problems and opportunities that ultimately define a city.

Some of these conclusions about the nature of thriving would have been missed were it not for two independent research projects in which the Polis Institute was involved at the time this profile was being created. The methodology used for this profile was to record comments from the area's "leading voices" in order to create a list of "Essential Subjects" of greatest interest and concern in the city. This was a fruitful exercise, but the initial list of leading voices was focused exclusively on people of the highest influence. The other two projects involved thousands of hours of conversations with people of lesser influence: one, a comprehensive survey of the employees of a fast-growing local business that employs mostly low-wage earners, and the other a massive survey project in the historically African American section just west of downtown Orlando, which contains pockets of the area's most concentrated and chronic poverty.

It is not surprising that these very different groups—the highly influential and less influential—described their situation and the region in very different terms. It is somewhat surprising that these descriptions often pointed in the same direction, to what the research team referred to as "collective hope." While the influential leader might say, "We need to diversify the economy by attracting higher-wage industries to the area," the person making a low wage or no wage might say, "I'm tired of all these dead-end jobs." And both would likely affirm, "I love Orlando, the weather, the people. It's exciting here." And "We have a lot more going for us than theme parks, that's for sure."

Two other studies conducted at the same time as this profile but by different groups are also quite informative. One was a national study on financial hardship in which the United Way of Florida participated, and the other was a values study that investigated the concerns of Central Floridians. The United Way report affirmed the central tenet of this profile, that Metro Orlando's low-wage work force is its primary challenge to becoming a city that is fully thriving. Nearly half of Metro Orlando's population is struggling to make ends meet, and "the growth of low-skilled jobs is projected to outpace that of medium- and high-skilled jobs into the next decade."[125] If that projection holds true, and local leaders do not make creative decisions to share the bounty of our collective success, then our collective hope will be ignored and Orlando will not fully thrive.

The values study identified three "source dilemmas" that cut across all of the Endowments but were discussed above in the section with which it best fit. For instance, identity was discussed as part of "The Sustainable." Metro Orlando is a fast-growing tourism and hospitality city with a bit of an identity crisis on its hands. The sum of Orlando's past decisions related to identity is the huge success of the region's theme park-based image, which has resulted in a large low-wage work force that is vulnerable to economic fluctuations. And the area does not have an independent sector that is mature enough or a public sector with enough of a mandate to fill the gaps and support this work force, one that desires the opportunity to actively participate in and enjoy the fruits of Orlando's success. The issues raised by this source dilemma clearly involve "The Prosperous" and "The Good."

Investing in a regional transportation system and understanding sector responsibility, the other two source dilemmas, also cut across multiple Endowments, but were discussed in the sections on "The Prosperous" and "The Good" respectively while pointing back to the pervasive identity issue as well. So while all three social sectors should figure out creative ways to more equitably share the bounty of the region's success, a broader identity and a better regional transportation system could prove to be

attractive enough to bring other industries to the area. Those three Endowments—"The Sustainable," "The Prosperous," and "The Good"—are the most vibrant for Orlando in terms of the attention being paid to them at present. That does not mean that these are the areas of Orlando's greatest thriving, just that they are the ones being given the largest stage.

The area of Orlando's greatest thriving may in fact be "The Beautiful" —perhaps not surprising in a place that bills itself as the City Beautiful. It makes one wonder if the identity that eventually coalesces in the region has been right under our feet. It is certainly evident in the beautiful venues that are rising from the ground, most notably the downtown Dr. Phillips Center for the Performing Arts. It is also evident in the public art pieces that seem to be popping everywhere and causing Orlando to increasingly, and surprisingly to some, show up on lists of America's most artistic cities.

Much of the energy behind this creative surge comes from Orlando's ever more youthful population. The area's fastest-growing demographic is people under twenty-five, and many of its successful entrepreneurs are relatively young. This phenomenon may be related to the tremendous success of UCF and Valencia College. More and more college-age people are coming to Orlando, having positive experiences, and remaining to put down roots. This speaks well for the endowment of "The True." While there are certainly tremendous challenges to secondary education, many of which are simply related to the region's ongoing and drastic population changes, the institutions of higher education are flourishing by nearly every account.

The other great challenge to the secondary education aspect of "The True" is the return of the idea of the neighborhood school. While, in and of itself, this is a very defensible concept, the situation in which it is being deployed may result in a return to de facto segregation. This, then, begins to bleed into the Essential Subject of racism and the endowment of "The Just and Well-Ordered." Racism is arguably the greatest threat to a thriving Orlando because there is such a wide gap in the way this issue is discussed—and not discussed.

The Polis Institute community engagement effort in the Communities of West Lakes involved nearly 30,000 hours of work, the vast majority of which were spent listening. The work was conducted by eighty volunteers and twelve contractors. The focus was the area in which the Citrus Bowl sits, a stadium that recently benefitted from a $200 million rebuild. The stadium also had the distinction of being in the poorest neighborhood in Orange County in 2014. The neighborhood is 100 percent black. The survey involved open-ended questions, and the 1,500 people who were surveyed were encouraged to share openly. What emerged were many stories of loss, of being left out or shut out of conversations and opportunity, of feeling lied to and exploited. And, for the most part, the people on the other side of these stories were white.

The influential leaders who were interviewed specifically for this profile were not so eager to talk about this issue, particularly those who were white. Thriving is not about being perfect. But it does necessitate dealing with reality. When different groups talk about a subject so differently, or are unwilling to talk about it at all, it is cause for concern. In all five of the other endowments Orlando is engaged in dialogue, and while there may be areas of stark disagreement, the conversations occur. "The Just and Well Ordered," in general and the subject of racism in particular are areas where Orlando is definitely *not* thriving.

This, then, is Orlando's challenge: Will it be fully able to embrace what it is while simultaneously expanding its base of talents and ensuring greater opportunity for everyone? And will it be able to handle talking publicly about its difficult racial history? Two key strengths suggest success: adaptability and vitality. The increasingly youthful and creative population and the constant influx of a wide range of people with new ideas, new cultures (one in five residents was born in a different country), and new dreams have yielded a welcoming spirit. Here is an irony: Orlando is adaptable because it truly is hospitable. The hospitality industry for which it is known around the world, and from which many locals would like to distance themselves, bespeaks the very qualities that will allow Orlando to embrace new ideas—new ideas that will, in turn, help it diversify and thrive.

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## PART IV: APPENDICES

### APPENDIX I: RESEARCH AND DATA COLLECTION METHODS

Qualitative and quantitative research was conducted over the course of six months (December 2013–May 2014) by a five-member Orlando Profile Research Team (OPRT) that conceptualized the project and conducting quantitative research for each "Endowment" as described by the University of Virginia's Institute for Advanced Studies in Culture (IASC). This was necessary because the Endowments had not yet been fully articulated. Endowment briefs were being written simultaneously with the city profiles. (There are five briefs in all.)

The OPRT developed a working definition of *thriving*, and each Endowment, then proceeded to identify Metro Orlando's "leading voices"—people who could best describe the historical context and present challenges and future plans for each Endowment. Input from the leading voices was derived from public comments and unstructured interviews. From the information gathered, a list of "Essential Subjects" was selected to help prioritize this report around the subjects of greatest *concern* to the leaders and residents of Metro Orlando. Similarly, a list of "Six Key Topics," one per Endowment, was chosen to summarize the overall topics of greatest *interest* to the leaders and residents of Metro Orlando.

Each team member then submitted his or her research findings to the project lead, who prepared an initial draft and presented that draft at a conference at the University of Virginia in June 2014. Following that conference, IASC staff provided feedback and the project lead worked with a general editor to create a second draft. With the second draft prepared, the project lead validated the Essential Subjects with a list of priorities that emerged from a values survey that was finalized at roughly the same time as the OPRT's initial draft. Following this review, two Essential Subjects were dropped from the report, two were combined, one was added, and three were renamed. The overall findings remained largely unaffected, as the most critical of the subjects were strongly validated.

The Endowment language from the IASC that set the tone and direction for the Orlando profile was helpful in that it was comprehensive, but also was so broad that it was challenging to provide a clear and concise introduction to the idea in interviews, which, in turn, influenced the responses. For this reason, the team interpreted each Endowment as to its "key subject"—what it ultimately was about in less conceptual language—in order to better facilitate the interview process. This decision may have caused an undue narrowing of the Endowment, which also influenced responses.

Similarly, the working definition of *thriving* remained somewhat conceptual, a general guide that was created out of necessity but that was not thoroughly worked into the research methodology throughout the process. It was more of an analysis framework used by the project lead to assess the interview material than a working theory to be tested. Had it been the latter, an exhaustive catalogue of "past decisions" could have been made, and a specific survey instrument could have been created to assess the "collective hope" of the city. This would have been a very interesting research project, for which this profile could have served as vital background information. But the profile described herein was of a different nature, and its findings are nonetheless instructive.

Research team members were assigned one or more Endowments as the following process unfolded:

I.      Conceptualize project

      a.      Read project overview with particular attention to the Endowment assigned to them.
      b.      Conduct quantitative research related to their Endowment.
      c.      Develop a working definition of *thriving*. This was used to help maintain a perspective during data collection and to inform a single definition for the Orlando profile that would act as a framing concept for the final presentation and report.

II.     Identify leading voices

      a.      Identify "leading voices" (LV) for each Endowment—local, contemporary persons who are most heavily influencing the region and/or have the most thorough understanding of the region in terms of that Endowment.
      b.      Research public comments by LVs that shed light on their views concerning the Endowment.
      c.      Conduct interviews with select LVs using University of Virginia questions as a guide.
      d.      From the LVs, glean the subjects of greatest concern to the region's residents. These subjects reveal the decisions that need to be made or that are actively being made that are essentially moving the region toward or away from "thriving." These decisions were referred to as "pivotal decisions."
      e.      Choose the "key topic" of concern for Metro Orlando as related to each Endowment.
      f.      Write the profile section and submit it to the project lead.

III.    Validate Essential Subjects

      a.      The values study by the Central Florida Partnership covered many of the same themes as the Thriving Cities Orlando profile and included regional priorities and source dilemmas that were used to validate the list of Essential Subjects developed by the OPRT.
      b.      Prepare final report.

## THRIVING

The OPRT viewed *thriving* as a very dynamic concept. The goal therefore became one of searching out how Metro Orlando was dealing with its challenges rather than compiling a mere description of its resources, accomplishments, or failures. A region could have all the resources in the world but still not be using them in a way that was sustainable, just, good, prosperous, beautiful, and true. Similarly, a region could be experiencing tremendous difficulty, which might reveal itself in low area incomes or educational achievement, but might be addressing these difficulties in a way that was productive and pointing toward a shared hope. The working definition of *thriving* was "where the sum of past decisions meets the collective hope for the future."

## KEY TOPICS

In an effort to make the endowments accessible in the interviews, "key topics" were developed to help facilitate conversation, which were conceptual and not thoroughly defined at the time of the profile research,

1.      Leadership: Sustainable
2.      Equity: Just and Well-Ordered
3.      Charity: Good
4.      Beauty: Beautiful
5.      Education: True
6.      Economy: Prosperous

**RESEARCH TEAM:**

1.      Phil Hissom
a.      Project lead; profile writer; researcher for "The Good" and "The Beautiful"
b.      Master of Divinity
2.      Rene Vazquez
a.      Researcher for "The Sustainable"
b.      Master of Business Administration
3.      Phyllis Thompson
a.      General editor
b.      Doctorate in Education
4.      Jacinta Mathis
a.      Researcher for "The Just and Well-Ordered" and "The Prosperous"
b.      Juris Doctorate
5.      Natalie Hamer
a.      Researcher for "The True"
b.      Master of Social Work

The following table lists the regional priorities and source dilemmas from the values survey in order of relative priority. The values study was used to validate the Essential Subjects of the OPRT. Several subjects were renamed, one was added, and two were dropped to create the final list.

| Endowment | Essential Subjects | Regional Priorities and Source Dilemmas |
|---|---|---|
| Sustainable | Identity | Source Dilemma:<br><br>Leadership that can help us deal with important challenges (6) |
| Prosperous | Transportation | Source Dilemma:<br><br>Reducing traffic congestion by improving transportation and transit options (9)<br><br>Easy access to shopping and recreational areas (13)<br><br>Convenient access to the region, local airports (16) |
| Good | Responsibility | Source Dilemma:<br><br>More jobs that offer good pay, benefits, and opportunity (2) |
| Just and Well-Ordered | Public Safety | Reducing crime and making neighborhoods safer (1) |
| Prosperous | Employment | More jobs that offer good pay, benefits, and opportunity (2) |
| True | Children's Education | Improving education (3) |
| True | Higher Education | Improving education (3) |
| Prosperous | Diversification | Improving the standard of living and economic health of the region (4) |
| Sustainable | Public Health | Increasing access to quality health care (5) |
| Sustainable | Ecology | Protecting the local environment and natural resources (7)<br><br>Enjoying the beach and nature (12) |
| Good | Issues of Concern | Affordability of housing (8)<br><br>Living close to family (18) |
| Prosperous | Taxes | Reducing traffic congestion by improving transportation and transit options (9) |
| Beautiful | Built Environment | Addressing the aging infrastructure (10) |

| Just and Well-Ordered | Racism | Improving social equity and justice... making sure there is opportunity and fairness for everyone (11) |
|---|---|---|
| Just and Well-Ordered | Laws | Improving social equity and justice... making sure there is opportunity and fairness for everyone (11) |
| Good | Culture of Service | Building a sense of community (14) |
| Beautiful | Culture<br><br>Cuisine | Increasing enjoyment of and access to culture and the arts (15) |
| Just and Well-Ordered | Electorate | Increasing civic involvement and engagement (17) |

This table shows the perceived responsibility of each social sector and the related endowment and Essential Subject. This information was used to further validate the subjects and inform the findings.

| Sector<br><br>(Values Study) | Sector Responsibility<br><br>(Values Study) | Endowment(s)<br><br>(Thriving Cities) | Essential Subject<br><br>(Orlando Profile) |
|---|---|---|---|
| Public | Education (61% ) | The True<br><br><br>The Prosperous | Children's Education<br><br>Higher Education<br><br>Taxes |
| Public | Safety (44% - Fair) | The Just and Well-Ordered | Public Safety |
| Public | Human Services (35%) | The Good<br><br>The Sustainable | Culture of Service<br><br>Public Health |
| Public | Public Transportation (34%) | The Prosperous | Transportation |
| Private | Jobs/The Economy (59%) | The Prosperous | Employment<br><br>Diversification |
| Private | Access to Retail (43%) | The Prosperous<br><br>The Beautiful | Transportation<br><br>Built Environment |
| Private | Supporting low-wage workers (34%) | The Prosperous<br><br><br>The Good | Employment<br><br>Diversification<br><br>Responsibility |
| Independent | Religious Organizations (40%) | The Good | Issues of Concern<br><br>Culture of Service |
| Independent | Helping the Homeless (40%) | The Good | Issues of Concern |
| Independent | Human Services (28%) | The Good<br><br>The Sustainable | Culture of Service<br><br>Public Health |

**Central Florida Regions and Populations 1900-2010**

| | M* | C* | Y* | S* | 2010 Population | Change 2000-10 | 1970 Population | Per Day 1970-2010 | 1970-2010 Change | 1930 | 1900 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Lake | 1 | 1 | 1 | 1 | 297,052 | 41.1% | 69305 | 12.5 | 328.6% | 23161 | 7467 |
| Orange | 1 | 1 | 1 | 1 | 1,145,956 | 27.8% | 344311 | 43.9 | 232.8% | 49737 | 11374 |
| Osceola | 1 | 1 | 1 | 1 | 268,685 | 55.8% | 25267 | 13.3 | 963.4% | 10699 | 3444 |
| Seminole | 1 | 1 | 1 | 1 | 422,718 | 15.8% | 83692 | 18.6 | 405.1% | 18735 | |
| Volusia | | 1 | 1 | 1 | 494,593 | 11.6% | 169487 | 17.8 | 191.8% | 42757 | 10003 |
| Flagler | | 1 | | 1 | 95,696 | 92.0% | 4454 | 5.0 | 2048.5% | 2466 | --- |
| Sumter | | 1 | | 1 | 93,420 | 75.1% | 14839 | 4.3 | 529.6% | 10644 | 6187 |
| Brevard | | | 1 | 1 | 543,376 | 14.1% | 230006 | 17.2 | 136.2% | 13283 | 5158 |
| Polk | | | 1 | 1 | 602,095 | 24.4% | 227222 | 20.5 | 165.0% | 72291 | 12472 |
| Alachua | | | | 1 | 247,336 | 13.5% | 104764 | 7.8 | 136.1% | 34365 | 32245 |
| Citrus | | | | 1 | 141,236 | 19.6% | 19196 | 6.7 | 635.8% | 5516 | 5391 |
| DeSoto | | | | 1 | 34,862 | 8.2% | 13060 | 1.2 | 166.9% | 7745 | 8047 |
| Hardee | | | | 1 | 27,731 | 2.9% | 14889 | 0.7 | 86.3% | 10348 | --- |
| Hernando | | | | 1 | 172,778 | 32.1% | 17004 | 8.5 | 916.1% | 4948 | 3638 |
| Highlands | | | | 1 | 98,786 | 13.1% | 29507 | 3.8 | 234.8% | 9192 | --- |
| Hillsbor-ough | | | | 1 | 1,229,226 | 23.1% | 490265 | 40.5 | 150.7% | 153519 | 36013 |
| Levy | | | | 1 | 40,801 | 18.4% | 12756 | 1.5 | 219.9% | 12456 | 8603 |
| Manatee | | | | 1 | 322,833 | 22.3% | 97115 | 12.4 | 232.4% | 22502 | 4663 |
| Marion | | | | 1 | 331,298 | 28.0% | 69030 | 14.4 | 379.9% | 29578 | 24403 |
| Pasco | | | | 1 | 464,697 | 34.8% | 75955 | 21.3 | 511.8% | 10574 | 6054 |
| Pinellas | | | | 1 | 916,542 | -0.5% | 522329 | 21.6 | 75.5% | 62149 | --- |
| Putnam | | | | 1 | 74,364 | 5.6% | 36290 | 2.1 | 104.9% | 18096 | 11641 |
| Sarasota | | | | 1 | 379,448 | 16.4% | 120413 | 14.2 | 215.1% | 12440 | --- |
| STATE | 4 | 7 | 7 | 23 | 18,801,310 | 17.6% | 6789443 | 658.2 | 176.9% | | 528542 |

Labels:
M: Metropolitan Statistical Area (MSA) defined by the U.S. Office of Budget and Management. The only significant local body that focuses on this geography is the Metro Orlando Economic Development Commission (EDC).
C: Combined Statistical Area (CSA) defined by the U.S. Office of Budget and Management. There are no known local bodies that attempt to plan or influence policy using this geography.
Y: My Region as defined by the Central Florida Partnership—an influential regional planning body.
S: Super Region as defined by Forward Florida. A publication gas been issued and regional planning conferences have been conducted that focus on this geography.

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## APPENDIX III: EDUCATION STATISTICS

1) Number of public schools:
- Orange County: 180: 126 elementary, 35 middle and 19 high... 27 charter school
- Lake County: 46: 20 elementary, 11 middle, 10 high, and 5 charter
- Seminole: 62: 36 elementary, 11 middle, 9 high, and 6 others
- Osceola: 58: 24 elementary, 8 middle, 8 high, 13 charter, 5 alternative

2) Number of private schools:

| | | | | |
|---|---|---|---|---|
| • Orange County: | 286 | PK-5 – 124 | 6th-8th -102 | 9th-12th – 60 |
| • Seminole County: | 112 | PK-5 – 54 | 6th-8th – 37 | 9th-12th – 21 |
| • Lake County: | 64 | PK-5th – 26 | 6th-8th – 23 | 9th-12th – 15 |
| •Osceola County: | 58 | PK-5th – 23 | 6th-8th- 20 | 9th-12th – 15 |

3) In 2011-12 school year, percentages of children in public school vs. private school:
- Orange County: Public School: 89%, Private School: 11%
- Osceola County: Public School: 93%, Private School: 7%
- Seminole County: Public School: 88%, Private School: 12%
- Lake County: Public School 93%, Private School: 7%

4) Graduation rates: Graduation rates are steadily on the rise in Florida. In comparing statistics from 2008-09 to 2012-13 school years, Orlando has seen the following increases:
- Orange County: 67.4% to 75.9%
- Osceola County: 71.9% to 78.1%
- Seminole County: 75.4% to 83.8%
- Lake County: 66.1% to 78.3%

**Source: Florida Department of Education data report, Florida's high school cohort graduation rates and single-year dropout rates, November 2013.**

5) SAT scores from 2012:
- Orange County – 488 Reading, 488 Math, 467 Writing, Total = 1443
- Osceola County – 463 Reading, 457 Math, 445 Writing, Total = 1365
- Seminole County – 520 Reading, 526 Math, 502 Writing, Total = 1548
- Lake County – 499 Reading, 489 Math, 477 Writing, Total = 1465
- National average– 496 Reading, 514 Math, 488 Writing, Total = 1498

6) Percentage of graduating students going on to a Florida public college:
- Osceola: 41.3%
- Lake: 42.5%
- Orange: 51.2%
- Seminole: 62.0%
- State average: 52.0%

7) Colleges and universities:
- University of Central Florida
- Valencia College
- Seminole State College of Florida
- Rollins College
- Mid Florida Tech - OCPS tech school
- West Side Tech - OCPS tech school
- Winter Park Tech - OCPS tech school
- Lake Technical College
- Florida College of Integrated Medicine
- Sanford-Brown College
- Full Sail University

- Asbury Seminary
- Reformed Theological Seminary
- Florida Space Institute

Other colleges and universities that have a campus in Orlando:
- Belhaven University
- Keiser University
- International Academy of Design and Technology
- Le Courdon Bleu College of Culinary Arts in Orlando
- Palm Beach Atlantic University
- Southern Technical College  (Orange, Seminole, and Lake Counties)
- University of Phoenix
- Herzing University
- Concord Career Institute
- Everest College
- Webster University
- Nova Southeastern University
- Columbia College
- Troy University

8) Percentage of the population with a bachelor's degree or higher, 2008-12:
- Orange County: 29.7%
- Seminole County: 33.6%
- Osceola County: 17.5%
- Lake County: 20.2%
- Florida average: 26.2%
- U.S. average: 28.5%

9) Libraries per county:
- Orange County : 15
- Osceola County : 6
- Lake County : 15
- Seminole County: 5

## APPENDIX IV: RELIGIOUS ADHERENCE

|  | 2010 | 2000 | 1990 | 1980 |
|---|---|---|---|---|
| Protestant | 58.6% | 60.2% | 73.0% | 76.0% |
| Catholic | 32.5% | 34.5% | 21.7% | 22.1% |
| Muslim | 3.2% | 0.4% | 0.0% | 0.0% |
| Mormon | 2.3% | 1.7% | 1.5% | 1.4% |
| Buddhist | 1.0% | 0.0% | 0.0% | 0.0% |
| Orthodox | 0.8% | 0.4% | 0.0% | 0.0% |
| Hindu | 0.7% | 0.0% | 0.0% | 0.0% |
| Jewish | 0.6% | 2.5% | 3.7% | 0.4% |
| Other | 0.2% | 0.2% | 0.1% | 0.1% |
| Adherents | 867,228 | 628,765 | 509,232 | 302,600 |
| Population | 2,134,411 | 1,644,561 | 1,224,852 | 804,925 |
| % Adherent | 40.6% | 38.2% | 41.6% | 37.6% |

**Appendix V: Food Trucks Per Capita**

|     | City | # of Food Trucks* | Population** | Food trucks per 100,000 ppl. |
| --- | --- | --- | --- | --- |
| 1. | Orlando, FL | 94 | 249,562 | 37.67 |
| 2. | Miami, FL | 140 | 413,892 | 33.83 |
| 3. | Washington, DC | 172 | 646,449 | 26.61 |
| 4. | Minneapolis, MN | 87 | 392,880 | 22.14 |
| 5. | Austin, TX | 156 | 842,592 | 18.51 |
| 6. | Denver, CO | 113 | 634,265 | 17.82 |
| 7. | Atlanta, GA | 78 | 443,775 | 17.58 |
| 8. | San Francisco, CA | 127 | 837,442 | 15.17 |
| 9. | Tampa, FL | 51 | 347,645 | 14.67 |
| 10. | Honolulu, HI | 44 | 374,658 | 11.74 |
| 11. | Seattle, WA | 71 | 634,535 | 11.19 |
| 12. | Nashville, TN | 66 | 624,496 | 10.57 |
| 13. | Cleveland, OH | 39 | 390,938 | 9.98 |
| 14. | Boston, MA | 59 | 636,479 | 9.27 |
| 15. | Las Vegas, NV | 52 | 596,424 | 8.72 |
| 16. | New Orleans, LA | 32 | 369,250 | 8.67 |
| 17. | Portland, OR | 51 | 603,106 | 8.46 |
| 18. | Indianapolis, IN | 70 | 834,852 | 8.38 |
| 19. | Dallas, TX | 103 | 1,241,162 | 8.30 |
| 20. | Sacramento, CA | 39 | 475,516 | 8.20 |
| 21. | Kansas City, KA | 34 | 464,310 | 7.32 |
| 22. | San Jose, CA | 71 | 982,765 | 7.22 |
| 23. | Los Angeles, CA | 269 | 3,857,799 | 6.97 |
| 24. | Columbus, OH | 52 | 809,798 | 6.42 |
| 25. | San Diego, CA | 75 | 1,338,348 | 5.60 |
| 26. | Philadelphia, PA | 81 | 1,547,607 | 5.23 |
| 27. | Houston, TX | 97 | 2,160,821 | 4.49 |
| 28. | San Antonio, TX | 61 | 1,382,951 | 4.41 |
| 29. | Phoenix, AZ | 59 | 1,488,750 | 3.96 |
| 30. | Chicago, IL | 80 | 2,714,856 | 2.95 |
| 31. | Orange County, CA | 66 | 3,114,363 | 2.12 |
| 32. | New York, NY | 110 | 8,336,697 | 1.32 |

**\*Courtesy of Roaming Hunger**
**\*\*US Census Bureau Data (2013 or 2012 estimates)**

## APPENDIX VI: TOP FIFTEEN UNITED ARTS-SUPPORTED ORGANIZATIONS

| Organization | UA funding |
|---|---|
| Orlando Philharmonic Orchestra | $907,410 |
| Orlando Shakespeare Festival | $667,685 |
| Orlando Museum of Art | $433,094 |
| Orlando Science Center | $429,895 |
| Orlando Ballet | $400,211 |
| Orlando Philharmonic – Concert Opera | $316,893 |
| Bach Festival Society | $257,531 |
| Orlando Repertory Theater | $146,173 |
| Crealde School of Art | $106,180 |
| Enzian Theater | $94,672 |
| Orange County Regional History Center | $86,912 |
| Art & History Museums – Maitland | $74,869 |
| Arts and Cultural Alliance of Central Florida | $71,826 |
| Wayne Densch Performing Arts Center | $61,100 |
| Seminole Cultural Arts Council | $54,918 |

## APPENDIX VII: IMPORTANT CENTRAL FLORIDA CHARITIES

| | 2012 Revenue | 2012 Assets |
|---|---|---|
| Community Based Care of Central Florida | 70 | 6.9 |
| Early Learning Coalition of Orange County | 65 | 5.4 |
| YMCA of Central Florida | 63.9 | 94.8 |
| Give Kids the World | 41.4 | 93.1 |
| Goodwill Industries of Central Florida | 38.2 | |
| Florida Citrus Sports Foundation | 23.9 | 12.3 |
| Florida Hospital Foundation | 23.5 | 120 |
| Heart of Florida United Way | 23.1 | 30.9 |
| Catholic Charities of Central Florida | 16.2 | 26 |
| Children's Home Society of Florida | 13.9 | |
| Boys & Girls Club of Central Florida | 11.2 | 304 |
| United Cerebral Palsy of Central Florida | 10.2 | 11.6 |
| Orlando Neighborhood Improvement Corp | 8.9 | 39 |
| Special Olympics Florida | 8.5 | |
| Seniors First | 8.3 | 4.5 |
| Impower | 8.1 | 1.3 |
| SPCA of Central Florida | 8 | 7.8 |
| Boy Scouts of America, Central Florida | 6.6 | 12.1 |
| Coalition for the Homeless of Central Florida | 6.3 | 8.6 |
| The Salvation Army-Orlando Area Command | 5.8 | 0.55 |
| Hope & Help Center of Central Florida | 5.1 | 1.1 |
| Boys Town Central Florida | 4.7 | 4.8 |
| Girl Scouts of Citrus Council | 4 | 7.1 |
| Healthy Start Coalition of Orange County | 4 | 1.9 |
| Make-A-Wish Foundation of Cent. & No. FL | 3.6 | 2.2 |

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*Note*: All amounts are in millions of dollars.