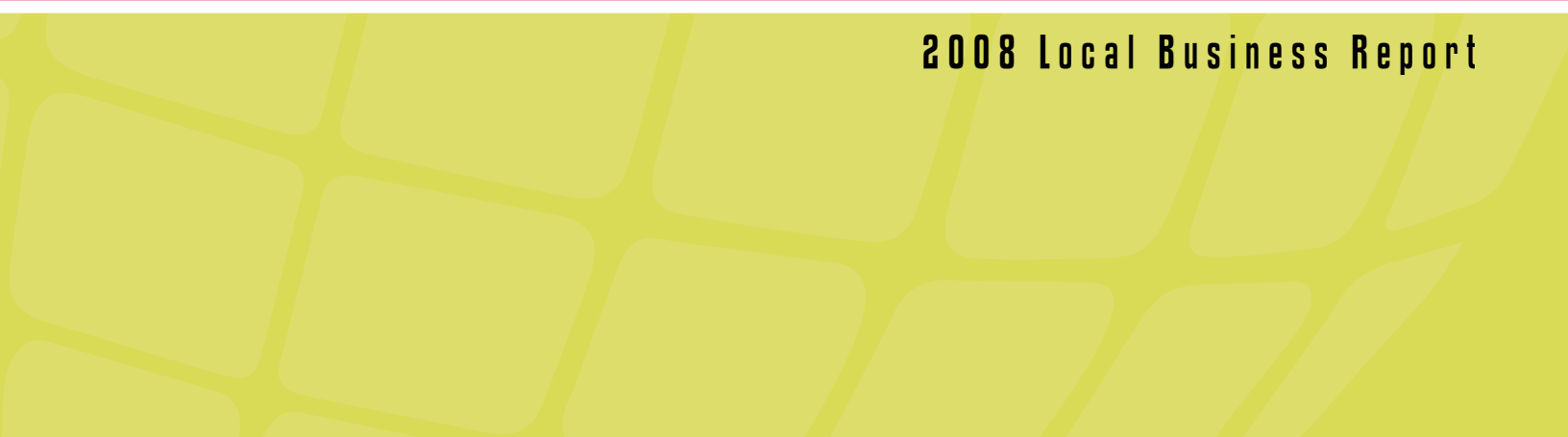




Retention & Expansion

2008 Local Business Report



2008 Co-Chairs' Message

Economic development refers to a sustainable increase in living standards. It implies increased per capita income, better education and health as well as environmental protection. This definition, attributable to Joseph Schumpeter (1883-1950), an economist and political scientist born in what is now the Czech Republic, still resonates with our local Hillsborough County business community today.

The Business Retention and Expansion Program, coordinated by the Greater Tampa Chamber of Commerce's Committee of One Hundred, is a multi-faceted program designed to preserve and enhance our community's business environment. The Program recognizes the need to improve our standard of living through strong job creation programs and improved cooperation among our business community and our local educators. We continue to strive to ensure that local talent graduating from our public schools and post secondary institutions finds employment locally. We believe our businesses are committed to our community and are making long-term investments in not only local real estate, but in our human capital as well.

Economic growth in Hillsborough County has weakened this year, as it has across our state and our nation. A variety of existing businesses restructured this year – some closed their doors, moved out of the community or downsized significantly. We have lost jobs in our construction trades as well as our financial services clusters. However, in spite of these tough economic times, we are seeing strengthened partnerships between our public and private sectors that will ultimately pay off in stronger, growing industry clusters in our community.

This year, 222 companies either completed a questionnaire for the first time or took time to update information gathered from an earlier interview. This is up more than 20% from our traditional level of participating companies.

Interestingly, the 2008 effort captured data we were not expecting. For example, while dozens of companies either closed their doors or downsized their employment significantly, 80 companies indicated they planned to add more than 2,000 new jobs in 2008. While not as many as identified in 2007, these numbers still show a positive commitment by many of our regionally-headquartered companies to stay and grow locally.

We will continue to work closely with our public and private sector partners. Responsiveness is the key to meeting the needs of our local business community. We will continue to pay attention to the concerns raised and work to build consensus in the best way to address them. There are barriers to our growth. 2009 will be another difficult year for business. Our ongoing success will continue to depend upon exchanging ideas, sharing responsibilities and making informed decisions at all levels.

Please continue to work with us as we continue to grow a community that is truly "Beyond Compare."

Sincerely,



John Ramil
President & COO, TECO Energy, Inc.
2008 Chair
Committee of One Hundred, Governing Cabinet



Brian Keenan
President Tampa Bay Region, Fifth Third Bank
2008 Subcommittee Chair
Local Business Retention & Expansion

BEYOND COMPARE

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2008 PARTICIPATING COMPANIES

22squared
 A J Arango
AAA Auto Club South
AACSB International
 Ace Hardware
 Achieve Tampa Bay
 Acuity Solutions
 Advanced C4 Solutions
 Airite Air Conditioning, Inc.
Akerman Senterfitt
 ALC Technical Staffing
 Alfonso Architects, Inc.
 All Area Roofing & Waterproofing Co.
 Allen Dell, P.A.
 Americare Ambulance Svc., Inc.
 Amerigroup Florida
Amscot Financial, Inc.
 AnazaoHealth Corporation
 Angell Construction, Creative Carpentry & Angell Restoration
 AnyDoc Software, Inc.
 APAC Customer Services, Inc.
 ARAMARK Sports & Entertainment, Inc.
 Arcadis
 Ashe Industries, Inc.
Atwell-Hicks
 Automated Petroleum & Energy Co.
 Ball Corporation, Metal Container Operation
 Baumann Raymondo & Co., P.A.
 Bay Area Legal Services, Inc.
Bay Cities Bank
 Bayshore Solutions
 Bayshore Technologies, Inc.
 Bayside Engineering
 Beck International
 BioTec Films, LLC
BlueCross BlueShield of Florida
 Booz-Allen & Hamilton, Inc.

Boys & Girls Clubs
 Bright House Networks, LLC
Busch Gardens Tampa & Adventure Island
Bush Ross, P.A.
 Butler Pappas Weihmuller Katz Craig LLP
CAE USA Military Simulation & Training
 Camden Development
Carlton Fields, P.A.
 Caspers Company
 Cast Crete Corporation
Catering by the Family
 Celestar Corporation
 CIBER Global Solution Center
Citi
Coca-Cola Enterprises, Inc.
Colliers Arnold
 Computer Generated Solutions, Inc.
Corporate Express
 Coventry Health Care
 Creative Mailbox Designs
Crescent Resources, LLC – Commercial Division
 Curts Gaines Hall Jones Architects
Cushman & Wakefield of Florida, Inc.
 Custom Cable Industries
Deloitte & Touche LLP
 Disney Reservation Center
 Diversified Maintenance Systems, Inc.
DLA Piper US LLP
 Doosan Hydro Technology, Inc.
 Drake Beam Morin, Inc.
 Driscoll's Strawberry Assoc., Inc.
 Eller-ITO Stevedoring Co., LLC
 EMSI
Ernst & Young, LLP
 Express Employment Professionals
 Fast Lane Clothing Company
Fifth Third Bank
First Housing

First Industrial Realty Trust
 Fisher & Phillips LLP
 FL Structural Steel
 Florida Bank
 Florida Capital Bank
 Ford Motor Credit Company
Fowler White Boggs P.A.
 Fred D. Learey Technical Center
 Fresenius Medical Care - Tampa
 Gans Gans & Associates
 Gardner Industries, Inc.
 GemSeal, Inc.
 Genesis Direct
 Genesis Group
 Glenn Rasmussen Fogarty & Hooker, P.A.
 Great West Healthcare
 Grubb & Ellis/Commercial FL
Grubb & Ellis Management Services
GTE Federal Credit Union
 Gulf Ridge Council, Inc., Boy Scouts of America
 GulfShore Bank
H. Lee Moffitt Cancer Center & Research Institute
 Haller Industries
 Hayward Baker
 HealthPoint Medical Group
Hellmuth, Obata & Kassabaum, Inc.
Highwoods Properties, Inc.
Hillsborough Community College
 Hilton Hotel Reservations Worldwide
 Holland & Knight LLP
Horizon Bay Senior Communities
 IBM (International Business Machines)
 Impact Industrial Supplies
 Infinity Business Systems
 International Paper
 International Ship Repair & Marine Svcs., Inc.
 Invitation Consultants

JBS Shipping Inc.
 Job News Circulation
 Johnnie B. Byrd, Sr. Alzheimer's Center & Research Institute
JP Morgan
 Kawasumi Laboratories America
 Kimmins Contracting
 KZF Design, LLC
 Landmark Engineering & Surveying Company
 Lazzara Yachts
M.E. Wilson Co., Inc.
 Magnetic
 Manpower Tampa West
McNichols Company
MediaLab Ventures LLC
 Mission Critical Solutions
 MLI Integrated Graphic Solutions
 Muir & Company, Inc.
 Namasco
 Northwestern Mutual Financial Network
 Nova Pro Risk Solutions
 NuAir Manufacturing
 Old Republic National Title Insurance Co.
 OSG Ship Management, Inc.
 PDMA Corporation
 Peak 10 (Data Center Solutions)
 Pegasus Imaging Corporation
 Pegasus TSI, Inc.
 Pender Newkirk & Company LLP
Pepin Distributing Company
 Persysent Technology Corporation
 Photoengraving, Inc.
 Pilgrim Software
 Plant City Community Development Corp., Inc.
Plastipak Packaging, Inc.
 PMSI
 Power Source Online
 PricewaterhouseCoopers

Psychological Assessment Resources, Inc.
 Pullman Holt
 Quadrant Software
 Quest Corporation of America, Inc.
R. R. Simmons Construction Corporation
 Rapid Staffing
Reeves Import Motor Cars
 Refurbished Office Furniture, Inc.
Regions Bank
 ReliaQuest, LLC
 Richland Towers
 Roberts Communications & Marketing, Inc.
 Rooms To Go International
 Ruden, McClosky, Smith, Schuster & Russell, PA
Ryan Companies US Inc.
 S. Walter Packaging Corporation
 SAIC
 SAS 70 Solutions Inc.
 School District of Hillsborough County
Shriners Hospitals for Children International Headquarters
 Shutts and Bowen, LLP
 Smith Barney
 South University – Tampa
 Sprinkle Consulting
Squire Saunders & Dempsey L.L.P.
St. Joseph's Hospital
St. Petersburg Times
Stearns Weaver Miller Weissler Ahadef & Sitterson, P.A.
 Studley, Inc.
 Sunshine Youth Services
SunTrust Banks, Inc.
 Switch & Data
 Syniverse Technologies
T. Rowe Price Services, Inc.
 Tampa Bay Federal Credit Union
 Tampa Bay Shipbuilding & Repair Company

Tampa Bay WorkForce Alliance
Tampa General Hospital
Tampa International Airport
 Tampa International Forest Products
 Tampa Microwave Lab
Tampa Port Authority
 Tampa Steel Erecting Co.
 Tampa Tank, Inc.
 Taylor Freezer Sales Co.
 Technology Transfer Services, Inc.
TECO Energy, Inc.
 TEKsystems
 Telecommunication Systems, Inc.
 The Art Institute of Tampa
The Bank of Tampa
The Beck Group
 The Home Depot
 The Omnia Group
 Thompson Sizemore Gonzalez & Hearing
 Tierra Geotechnical/Materials Engineering
 Time Customer Service, Inc.
 TK Automotive Institute
 Triage Partners, LLC
 Unifirst Corporation
 University Community Health
University of South Florida
 URS Corporation
 ValienteHernandez, P.A.
 Vanus, Inc.
Veredus Corporation
 Verizon Wireless
 Vertical Integration, Inc.
 Wharton Smith
 WilsonMiller, Inc.
Workplace Resource of Tampa Bay
Wright's Gourmet House
Yale Lift Trucks of Florida & Georgia

Bold indicates Committee of One Hundred members

EXECUTIVE SUMMARY

Local Business Retention & Expansion Program

We learned:

Since we began our Local Business Retention and Expansion Interview Program in 2005, it has become clear that of all the community-wide concerns that impact business operations, none appear to be more important than issues surrounding workforce.

Results from our local interviews:

1. We still have significant challenges in recruiting candidates.

1 = most significant 5 = least significant

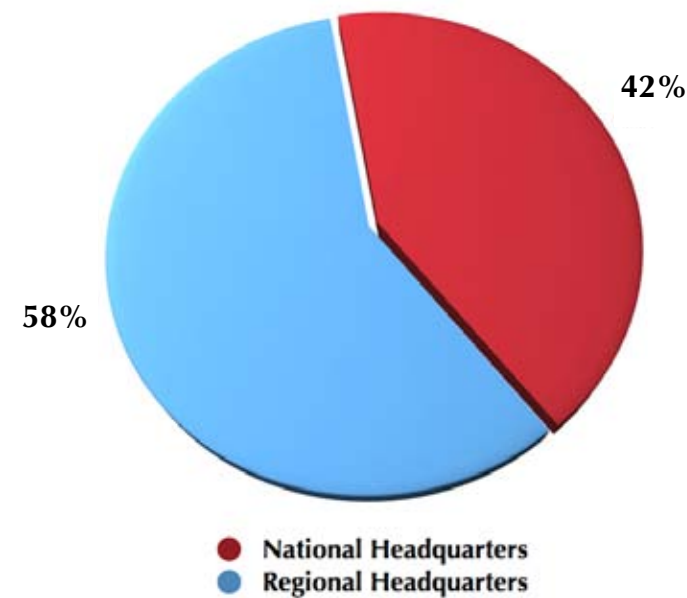
2008

- 1 – Access to qualified candidates
- 2 – Educational attainment/skills level
- 3 – Cost of recruiting
- 4 – Cost of training
- 5 – Access to affordable housing
- 6 – Access to workforce/labor market info

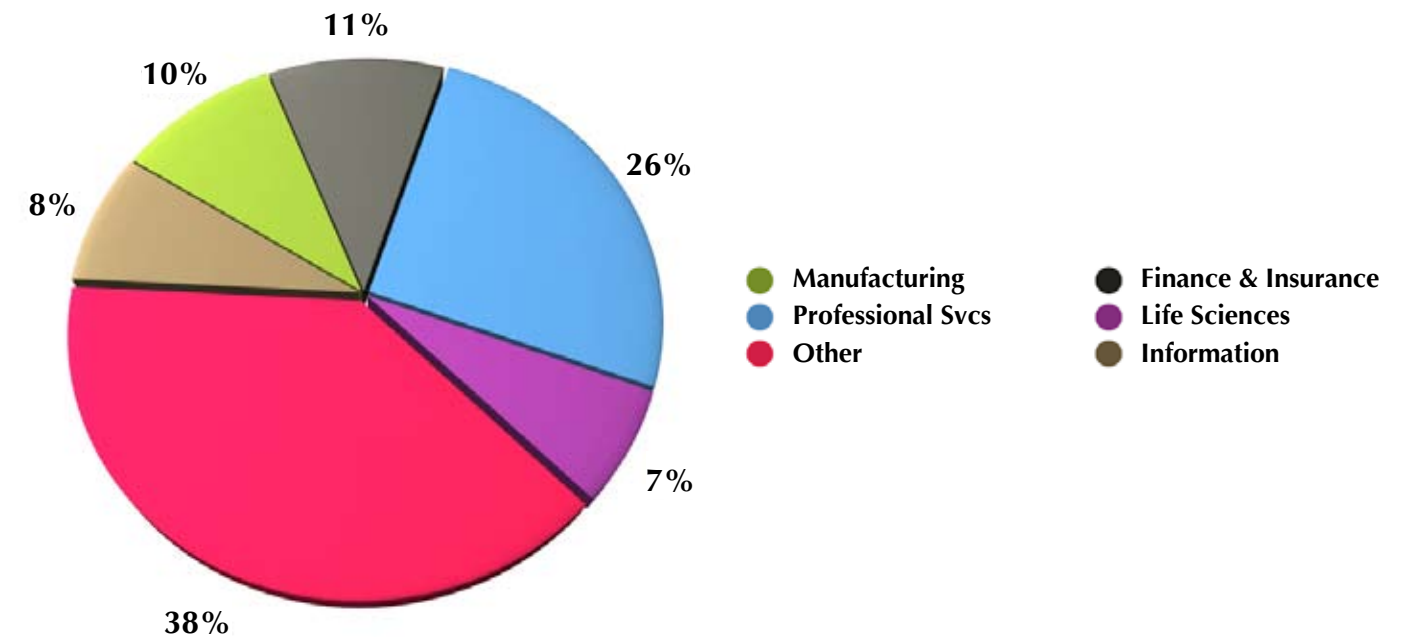
2007

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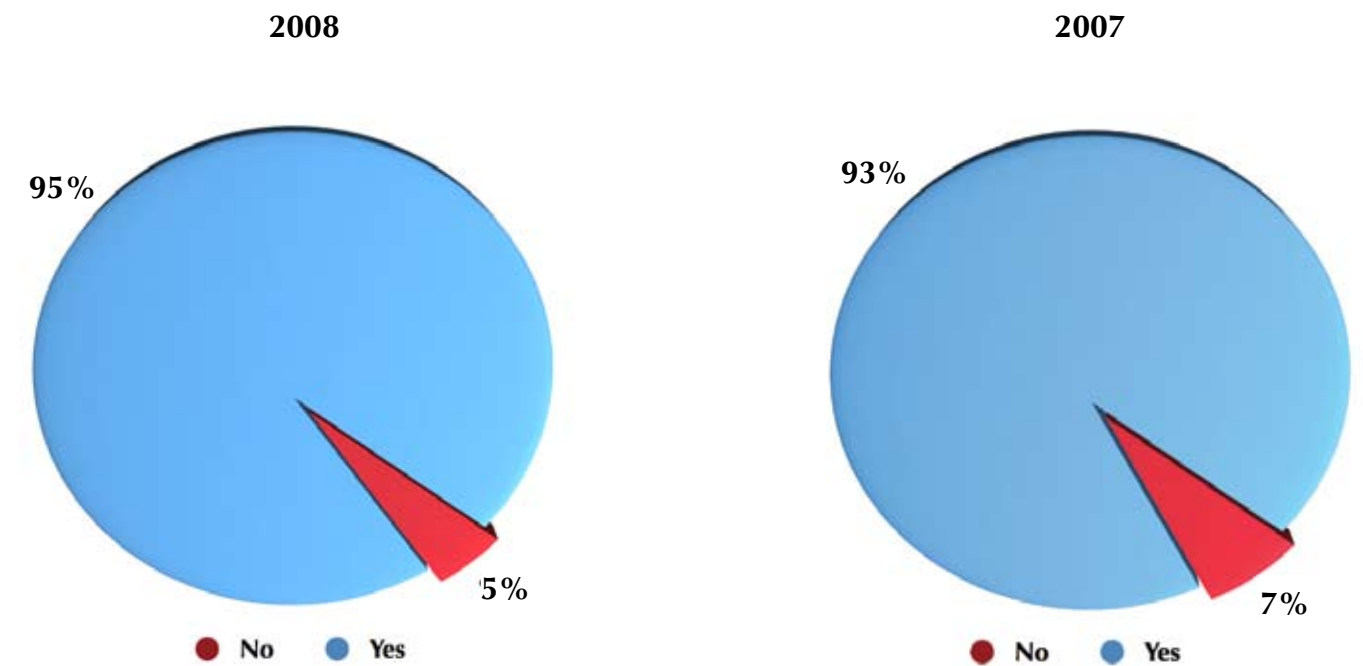
2. The majority of local businesses interviewed are regionally headquartered in Hillsborough County.



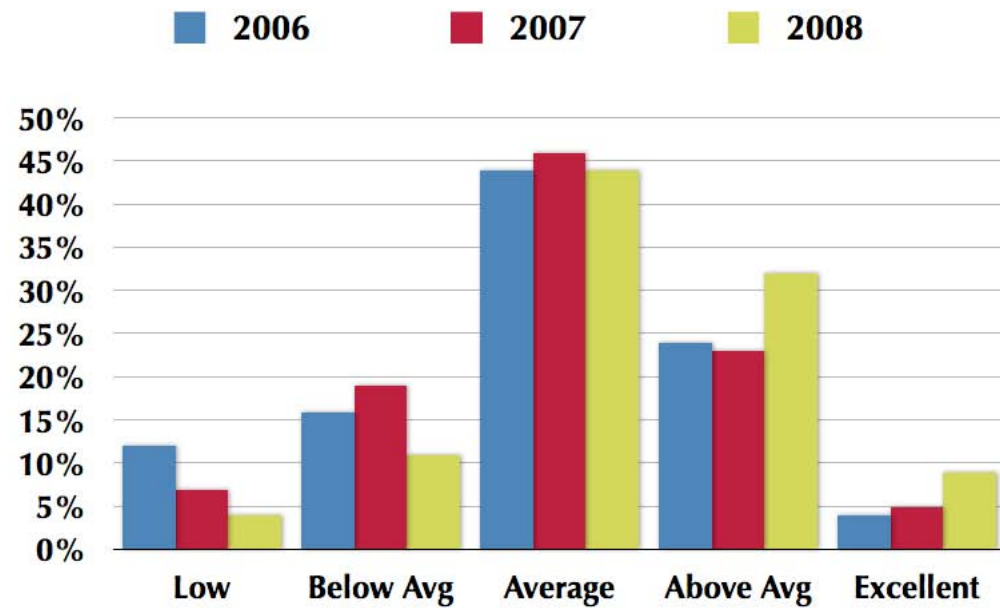
3. We have good representation of all major industry clusters participating in our 2008 interview process.



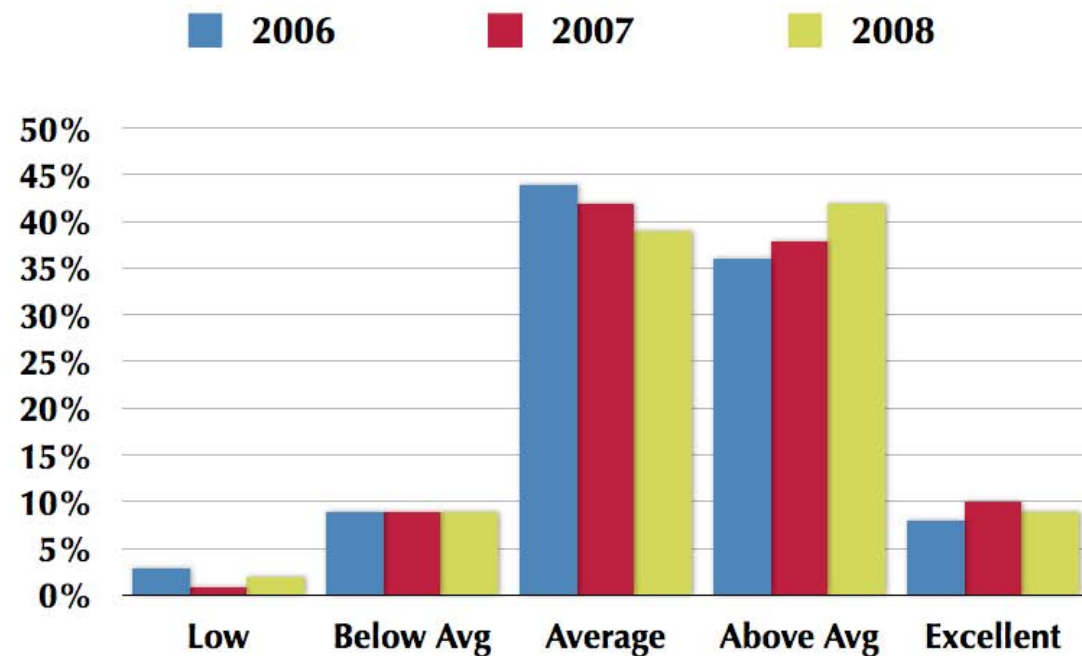
4. There was a slight increase in those companies who would recommend Hillsborough County as a good place to do business.



5. From 2006 through 2008, local businesses reported that availability of quality workforce is showing signs of improvement.



6. The quality of our local workforce continues to trend upward.



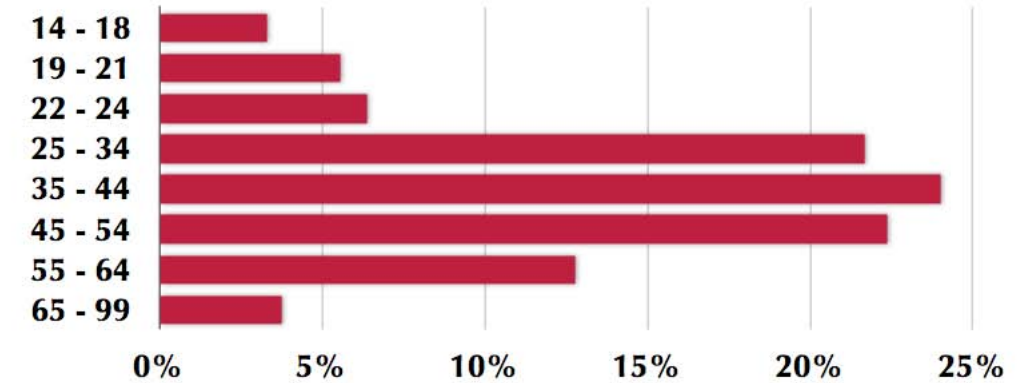
In comparing our progress with other Florida counties, the state and nation, we discovered that:

1. Our county has grown faster than the Metropolitan Statistical Area (MSA), the state and the nation.

	2008	2000	Net Change	Change
Hillsborough County	1,200,541	998,948	201,593	20.20%
Tampa/St. Petersburg/Clearwater MSA	2,742,577	2,396,013	346,564	14.50%
Florida	18,807,219	15,982,824	2,824,395	17.70%
United States	304,414,544	281,421,906	22,992,638	8.20%

Prepared by the Florida Legislature, Office of Economic and Demographic Research.
Source: Demographic Estimating Conference Database, updated August 2008, and the U.S. Census Bureau

2. Most workers are age 25 to 54



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center and U.S. Census Bureau, Local Employment Dynamics, Average of 2006Q4 - 2007Q3

3. The unemployment rate in the county is lower than the MSA.

	Labor Force	Employment	December 2008 Unemployment Rate	December 2007 Unemployment Rate
Hillsborough County	615,408	567,340	7.8%	4.5%
Tampa/St. Petersburg/Clearwater MSA	1,355,614	1,243,637	8.3%	4.7%
Florida	9,281,000	8,557,000	7.8%	4.5%
United States	154,349,000	143,350,000	7.1%	4.8%

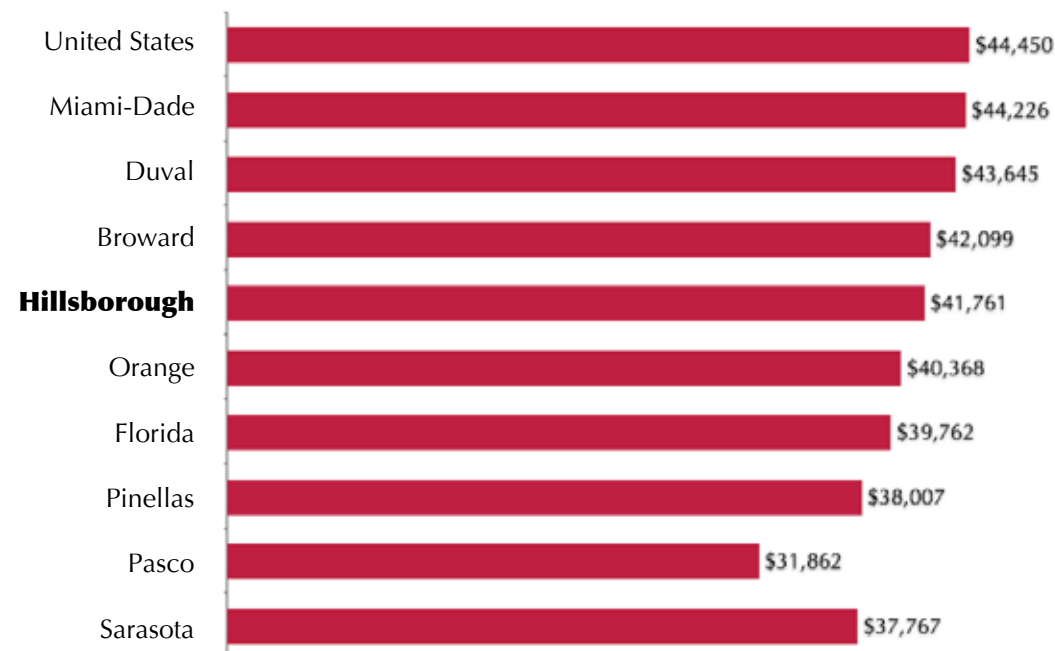
Source: Florida Agency for Workforce Innovation, Local Area Unemployment Statistics Program (in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics), released January 23, 2009.

4. Professional and Business Services continue to be the largest employment sector in the Tampa/St. Petersburg/Clearwater MSA.

Tampa MSA Major Industry Employment December 2008		Tampa MSA Major Industry Employment December 2007	
Construction	71,800	Construction	79,700
Manufacturing	59,800	Manufacturing	73,100
Information	30,200	Information	31,200
Finance & Insurance	98,900	Finance & Insurance	99,900
Professional & Business Services	278,500	Professional & Business Services	291,800
Education & Health Services	169,100	Education & Health Services	165,300
Total Government	158,700	Total Government	157,100

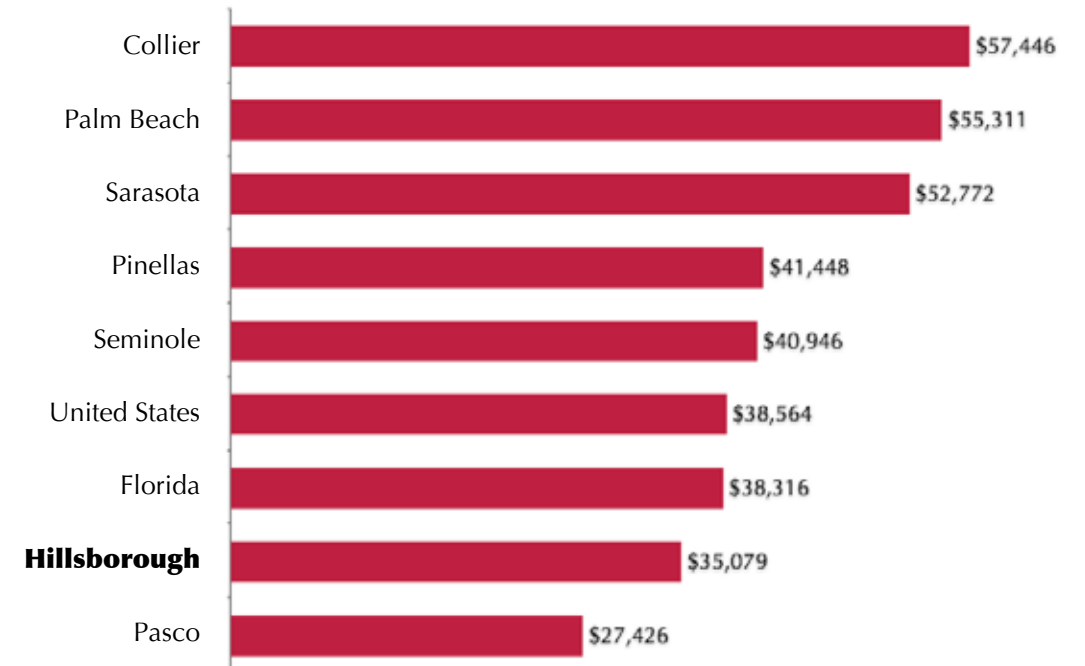
Source: Florida Agency for Workforce Innovation, Current Employment Statistics Program (in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics), released January 23, 2009.

5. While Hillsborough County ranks 4th highest for average annual wage compared to other Florida counties, we are still below the U.S. average.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages (QCEW). Released November 2008.

7. This year, Hillsborough County slipped below the state in per capita personal income.

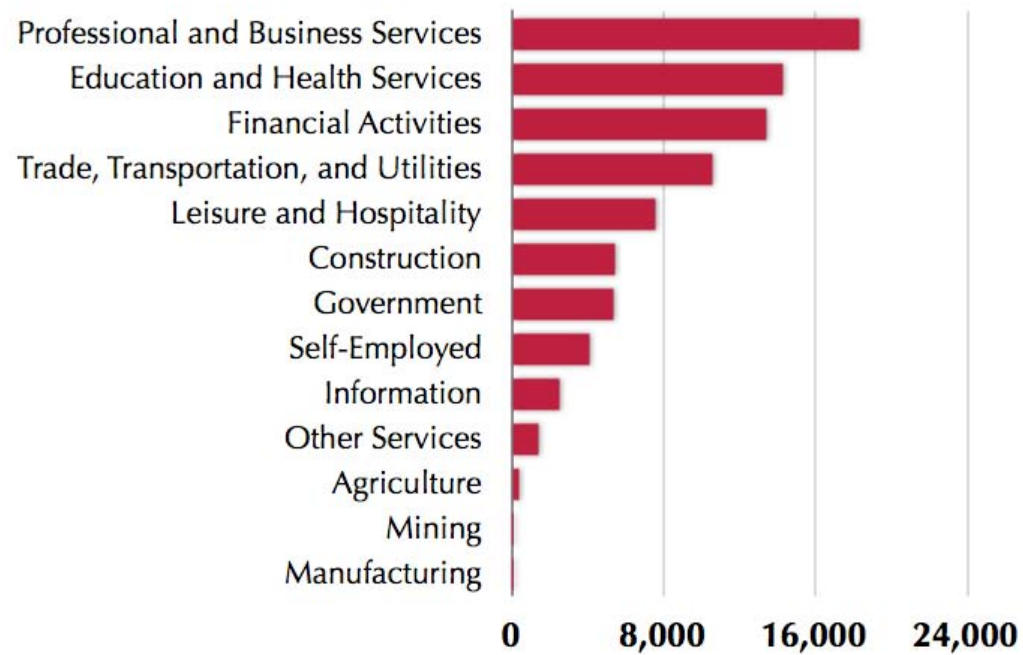


Source: PCensus - USA 2007

What trends are impacting our Hillsborough County workforce?

- Hillsborough County is projected to gain nearly 83,704 new jobs between 2008 and 2016 (1.37% annual growth).
- All major industry sectors will see employment gains.
- Some of the industries hardest hit by job losses starting in 2007, will experience some of the largest job gains as these industries recover.
- More than half of the new jobs in Hillsborough County will come from five occupational groups: clerical, sales, business support, food service and health professional.
- Legal, architecture and engineering occupations will grow the fastest.

Hillsborough County expected employment growth between 2008 and 2016.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center November 2008

Labor Market Information Resources

- Labor Market Statistics: www.labormarketinfo.com
- Florida Research and Economic Database (FRED): www.fred.labormarketinfo.com
- What People Are Asking (WPAA): www.whatpeopleareasking.com
- Florida Occupational Employment and Wages: www.floridawages.com

WORKFORCE INITIATIVES

Continued Workforce Initiatives

The Greater Tampa Chamber of Commerce and the Committee of One Hundred continue to be passionate supporters of the inherent partnerships that exist in Hillsborough County and its municipalities between our educators and the business community. In 2005, we noted key action items that needed to be addressed over 36 months. Below is our third update on those key activities:

Key Action Items

Access to Qualified Candidates

Develop a process to determine the workforce needs of companies.

- Supported the Tampa Bay WorkForce Alliance’s (TBWA) annual forecast conference where 90 local business representatives helped identify future employee training needs in the community on matters related to workforce development and needed skills.
- Supported the Tampa Bay Metro Business Leadership Network’s (TBMLN) launch of the area’s Newest Employer Resource. The event targeted area employers to raise awareness that people with disabilities are skilled and trained workers who make valuable employees.
- Convened a group of local employers to review a doctoral candidate report that collected data from 150 representative companies to analyze the insights and trends of interest to area businesses.

Conduct industry specific roundtables and/or forums on topics of local importance.

The Local Business Growth Forum attracted 75 attendees to its half-day conference. Key topics raised during the Local Business Retention interviews, included:

- A Master Transportation Plan for our Community

- The Changing Face of Healthcare Options for Business
- Business Insurance Rates – Trends and Impacts of Recent Legislation
- Partnering between the Local School District and Community Businesses – The Importance of Florida Ready to Work

The Chamber annual workforce conference brought together more than 100 business leaders, educators and community leaders. Several key topics were covered in breakout sessions including:

- The Role of Business Partners and Advisory Boards working with the Career Academies
- Creating and Encouraging Internship Programs
- Employee Retention Through Career Development Programs
- Hiring People with Disabilities
- Identifying and Retaining the Right People for Your Organization

Education Attainment

Promote and support effective location education and training initiatives.

Continue to facilitate dialogue between business, education, and workforce development leaders.

The Chamber’s Education, Employment and Economic Development (E-3) subcommittee, in conjunction with TBWA, hosted “Wednesday Workforce Trends” seminars to raise awareness of services available to area businesses for the training and retention of workforce.

Support Florida Advanced Technological Education (FL-ATE) initiatives related to manufacturing curriculum.

FL-ATE crafted the statewide articulation agreement that provides articulation of 15 credits of the ET Core (Electronics, Measurements, Processes, Quality, and Safety) to the A.S./A.A.S. Engineering Technology Degree anywhere in the state. To further enhance this pathway, FL-ATE is currently developing a new secondary program curriculum framework for high school students that is aligned with the MSSC skills standards.

Skills Levels

Promote the Diploma-see Initiative to eighth grade students to help teach them the value of staying in school and earning their high school diploma.

This initiative, reformatted in partnership with the West Coast Junior Achievement (JA), the School District of Hillsborough County and the Tampa Bay WorkForce Alliance, Inc. brings role model volunteers to area middle schools. The Chamber now assists with recruiting, training and delivering more than 400 volunteers twice a year.

Foster the creation of educational campaigns that emphasize the value of career level certificates of completion and higher education degrees.

The Aparicio-Levy Adult Technical Center now offers a 450-hour Manufacturing Technology Program. Students learn to use a variety of equipment and technology used in manufacturing such as CNC milling machines, CNC lathes,

and assembly-robotic systems. Students earn 15 college credit hours upon successfully passing the Manufacturing Skill Standards Council (MSSC) Certification exam.

Create awareness programs that reinforce the use of certificates of completion as a stepping stone to more high-skill, high-wage opportunities.

The Aparicio-Levy Technical Center offers introductory career training in manufacturing, media production and phlebotomy as well as Cisco and network certification programs. The Center is also an approved Florida Ready-to-Work Assessment site, measuring student workplace readiness and skills. Partnering with the C100 Local Business Retention & Expansion interview initiative, 87 local companies learned about one or more of these programs in 2008.

Access to Workforce/Labor Market Information

Promote the Emerge Tampa demographic as a young professional talent pool.

Emerge Tampa Bay, a networking and leadership group for Tampa young professionals ages 21 to 35, hosts a variety of signature events including:

- The Mentoring Program
- The Advanced Leadership Development
- Executive for a Day
- Professional Development Seminars
- The Buzz
- Community Outreach Activities

The Greater Tampa Chamber of Commerce and the Committee of One Hundred wish to thank the following business partners for their support and guidance in addressing the key issues raised by our local businesses during the interview process: City of Tampa Economic Development Department; Employ Florida Banner Center for Manufacturing; Florida Advanced Technological Education Centers; Hillsborough County Economic Development Department; Hillsborough County Small Business Information Center; Hillsborough County Public School District Adult Technical Centers; Hillsborough County Public School District Career Academies; Tampa Bay WorkForce Alliance, Inc.; The Corporate Training Center @ HCC.

GREATER TAMPA CHAMBER OF COMMERCE COMMITTEE OF ONE HUNDRED

2008 Local Business Retention & Expansion Subcommittee

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Fifth Third Bank

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London Baker Group

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Interstar Financial

Christine Campanile
IT Authorities

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Access Leisure Management LLC

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Dina Ward
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Jamie Zolman
Suncoast Office Solutions

Jeffrey Zurek
Pilot Bank



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The Greater Tampa Chamber of Commerce enhances our members' success by serving as the voice of business on important issues, and by connecting them to the resources they need. We also build a stronger business community by creating more high paying jobs and helping young business leaders grow. The Chamber's Committee of One Hundred is Tampa/Hillsborough County's official economic development organization, funded in partnership with Hillsborough County, the cities of Tampa, Temple Terrace and Plant City, and private investors.