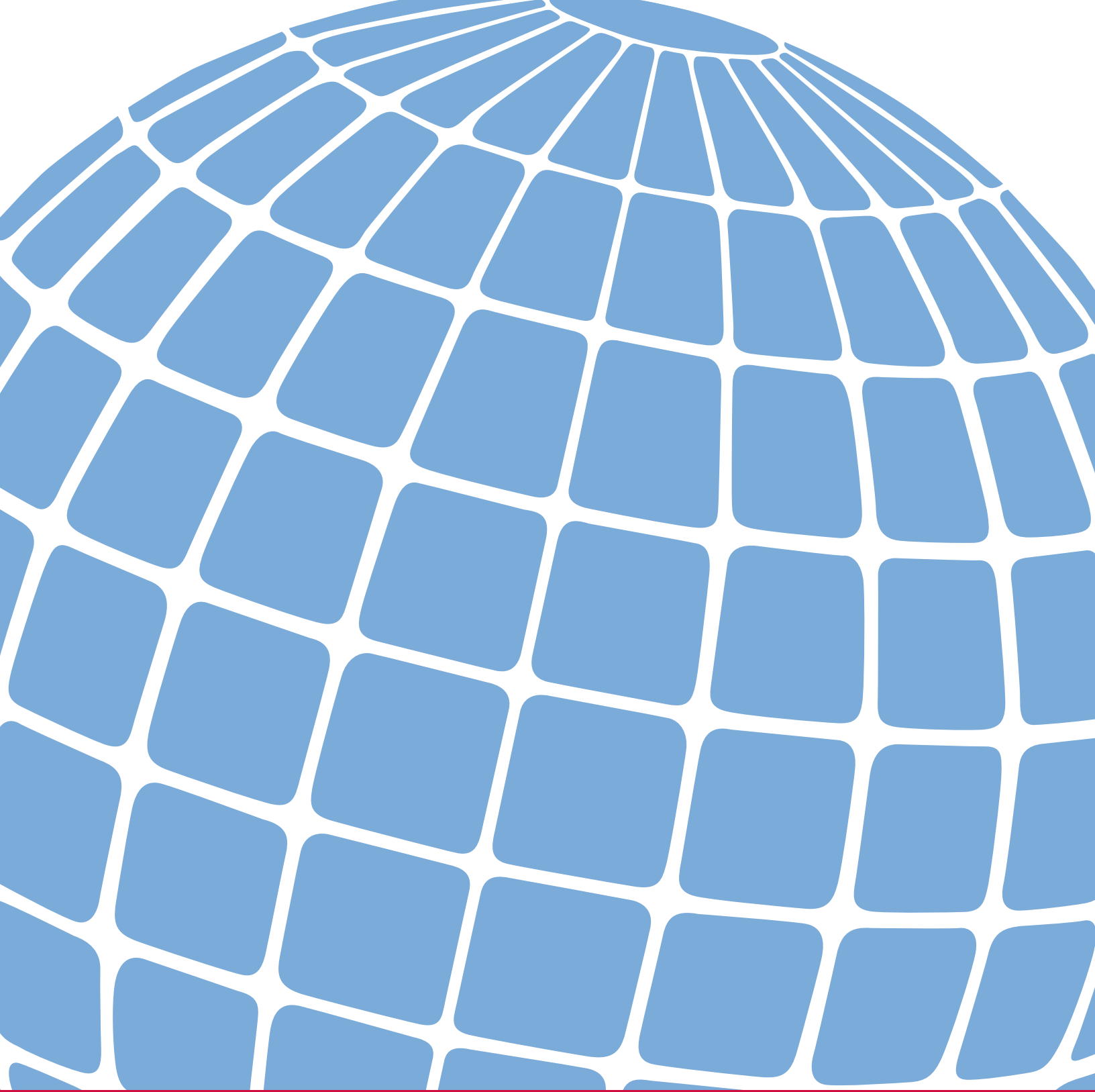




Local Business

Retention & Expansion

2005 Report



B E Y O N D C O M P A R E

A Message from your 2005 C100 Chairs

It is no surprise that so many businesses have looked at the Tampa area to set down roots, and have grown and flourished. Hillsborough County and the cities of Tampa, Temple Terrace, and Plant City offer a healthy mix of industries that are critical to the overall well-being and economic health of our community. From financial services and bioscience to manufacturing, technology, and international trade, local established businesses have made significant capital investment in our community and brought higher than average-wage jobs to our residents.

The Greater Tampa Chamber of Commerce's Committee of One Hundred established a local business outreach program in 2005, interviewing hundreds of companies to stay in touch with the needs of our local businesses. The retention and expansion of existing business is truly at the heart of any community's success. We learned a lot from this initiative over the past year. Many surveyed mentioned the areas we need to pay close attention to: the quality of our employee pool is good, but must be watched closely if we are to meet the coming demands for talent; transportation and traffic are strong concerns; and, growth management needs to be addressed.

Our success will depend upon exchanging ideas, sharing responsibilities, and making decisions at all levels. Responsiveness is the key to meeting the needs of our local business community. By holding to the highest standards of honesty, integrity, respect, and professionalism, your local community governments are totally focused on providing outstanding customer service to you, our business partners.

The retention and expansion of existing business is key to our continuing success. When the representatives from the Chamber's Local Business Retention Subcommittee call you, please talk with them. Your thoughts on the availability and quality of workforce, as well as frank discussions concerning community issues are vital to ensuring that we do create a community that is truly "Beyond Compare."

Please, **take the call**. Let's continue to work together to advance the well being of not only our individual residents, but of our local business enterprises as well. Our baseline of local perception was established in 2005. Let's see if we can't make major, tangible improvements in 2006.

Sincerely,



Judy Genshaft
President, University of South Florida
Chair, 2005
Committee of One Hundred



Randy Simmons
Chairman, R.R. Simmons Construction Corp.
Chair, 2005
Local Business Retention and Expansion

For more information visit the Chamber's website at www.tampachamber.com/retention or contact the Committee of One Hundred at the Greater Tampa Chamber of Commerce at (800) 298-2672 extension 406.

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2005 Participating Companies

AAA Auto Club South
AACSB International
ABI Construction Services
A-Fab Co., Inc.
A J Arango
Achieve Tampa Bay
Airite Air Conditioning, Inc.
American Express Travel Related Services
American Louvered Products Company
American Marketing and Mailing Services, Inc.
America's Body Company
Amscot Corporation
AnazaoHealth Corporation
Arcadis
Ardaman & Associates, Inc.
Ashe Industries, Inc.
ASI Building Products
Audio Visual Innovations, Inc.
Ayres Associates
Ball Corporation
Batson-Cook Company
Bay Area Legal Services, Inc.
Bay Cities Bank
Bayside Engineering, Inc.
Borrell Electric Co., Inc.
Bradco Supply
Breezemaker Fan Company
Bricklemyer Smolker & Bolves, P.A.
Bright House Networks
Brown & Brown, Inc.
CAE USA, Inc.
Camden Living
Camp Dresser & McKee Inc.
Capital Realty Investors, Inc.
Carey, O'Malley, Whitaker and Manson, P.A.
Carlton Fields, P.A.
Catering By The Family
Cemex
CH2MHill
Citigroup
CKB Industries, Inc.
Coca-Cola Enterprises, Inc.
Coldwell Banker Residential Real Estate, Inc.
Colliers Arnold
Colonial Properties Trust
Commercial Design Services
Computer Associates
Concentra Integrated Services
Cordova, Smart & Williams, LLC
Corporate Express
CP Ships
Creative Recycling Systems, Inc.
Cushman & Wakefield
Deloitte & Touche LLP
Dewalt/Black & Decker
Diamond Products/White Rain
Dickman Investments
DLA Piper Rudnick Gray Cary US LLP
Dynaflair Security Closure Systems
E.A. Mariani Asphalt Co., Inc.
Ed Taylor Construction
Eller & Company, Inc.
EMI Industries (Edwards Manufacturing)
EMSI
Enporion
Ernst & Young, LLP
ESI International, Inc.
Fifth Third Bank
First Citrus Bank
First Housing
First Industrial Realty Trust, Inc.
Florida Structural Steel
Fowler White Boggs Banker P.A.
Franklin Packaging Company
Gans, Gans & Associates
Garrison Stevedoring
G E Walker Inc.
General Engineering Corporation
General Motors Corporation
Genesis Group
Gerdau AmeriSteel
GrayRobinson, P.A.
GTE Federal Credit Union
Gulf Eagle Supply
GunnAllen Financial
GVA Advantis Real Estate Services
Harborside Refrigerated Services
Hardin Construction Company, LLC
Hellmuth, Obata & Kassabaum (HOK)
Highwoods Properties, Inc.
Hilton Hotel Reservations Worldwide
Holland & Knight LLP
Home Discovery Real Estate Services Corp.
Horizon Bay Senior Communities
Impact Distributing of Florida
Infocrossing Healthcare Services, Inc.
Integrated Project Services (IPS)
IVANS
JC Newman Cigar Co.
Jacobson Window
Jagged Peak
JPMorgan Chase & Co.
Kawasumi Laboratories America
KB Home
Kforce, Inc.

KPMG LLP
 Laboratory Corporation of America
 Landcare Group
 Larkin Contracting, Inc.
 Lazzara Yachts
 Learey Technical Center
 Lee Pallardy, Inc.
 Levy Awards & Promotional Products, Inc.
 LifeLink Foundation
 M.E. Wilson Co., Inc.
 MacDill Federal Credit Union
 MarkMaster, Inc.
 Marriott Execustay
 McNichols Company
 MediaLab Inc.
 MetLife
 Miller Florida Homes, Inc.
 Modular Mailing Systems
 Mosaic Fertilizer, LLC
 Namasco
 National Graphic Imaging (NGI)
 New York Life Insurance
 Newland Communities
 NuAir Windows and Doors
 Outback Steakhouse, Inc.
 Oxford Health Plan
 PDMA Corporation
 Peninsular Paper Co., Inc.
 Pepin Distributing Co.
 Photoengraving, Incorporated
 Plastipak Packaging
 Psychological Assessment Resource (PAR)
 R. R. Simmons Construction Corp.
 RBC Centura Bank
 Reeves Import Motorcars, Inc.
 Refurbished Office Furniture
 Reynolds, Smith & Hills, Inc.
 Roberts Communications & Marketing, Inc.
 Sack & Menendez
 St. Joseph's Hospital
 School District of Hillsborough County
 Smith & Associates Realtors, Inc.
 Smith & Nephew, Inc.
 Smith Barney
 Southeastern Companies
 Southern Power & Controls
 Southwest Florida College
 SSA Gulf (Stevedoring Services of America)
 Stearns Weaver Miller Weissler Alhadeff & Sitterson, P.A.
 Strategic Outsourcing, Inc.
 Studley, Inc.
 Sunshine Youth Services
 Sweetbay Supermarket
 Switch & Data Facilities Co.
 Syniverse Technologies
 T. Rowe Price & Associates
 TECO
 Tampa Armature Works (TAW) Inc.
 Tampa Bay Shipbuilding & Repair Co.
 Tampa Bay Workforce Alliance, Inc.
 Tampa General Hospital
 Tampa International Airport
 Tampa Marriott Waterside Hotel
 Tampa Port Authority
 Tampa Steel Erecting Co.
 Tampa Tank & Welding
 TEKsystems
 The Bank of Tampa
 The Beck Group
 The Bromley Companies
 The HLA Group
 The St. Petersburg Times
 The Thompson Group
 Thompson, Sizemore & Gonzalez
 Time Customer Service, Inc.
 Trade Mark Metals Recycling
 Trammell Crow Company
 Trenam, Kemker, Scharf, Barkin, Frye, O'Neill & Mullis
 Triple Net Properties
 Tropical Shipping/Thompson Line
 Trucks and Parts of Tampa
 Tucker Hall, Inc.
 United Healthcare of Florida, Inc.
 University of South Florida
 URS
 USAA
 ValienteHernandez P.A.
 Veredus Corporation
 Verizon Communications
 Vertical Integration, Inc.
 Vitality Food Service, Inc.
 Volkert & Associates, Inc.
 Wellcare Healthplans, Inc.
 Westshore Glass Corporation
 Wharton Smith, Inc.
 WilsonMiller, Inc.
 Woodroffe Corporation Architects
 Workplace Resource of Tampa Bay
 Wright's Gourmet House
 WUSF Public Broadcasting

EXECUTIVE SUMMARY

LOCAL BUSINESS RETENTION & EXPANSION PROGRAM

Focus:

In early 2005, we expanded our area of focus to include not only attracting new companies and jobs to Tampa, but also working with our existing base of local companies. Much attention has been given to new companies and jobs coming to the Tampa/Hillsborough area, but little attention has been given to the companies who already call Tampa home. In an effort to change this, we decided to put together a new program - the Local Business Retention and Expansion Program - which would be manned by Chamber volunteers. Their focus and goal would be to interview local businesses in order to obtain feedback about operating their business in the community. We would then share the results with the businesses and report what action steps we would take to try to resolve the major issues obtained from the surveys.

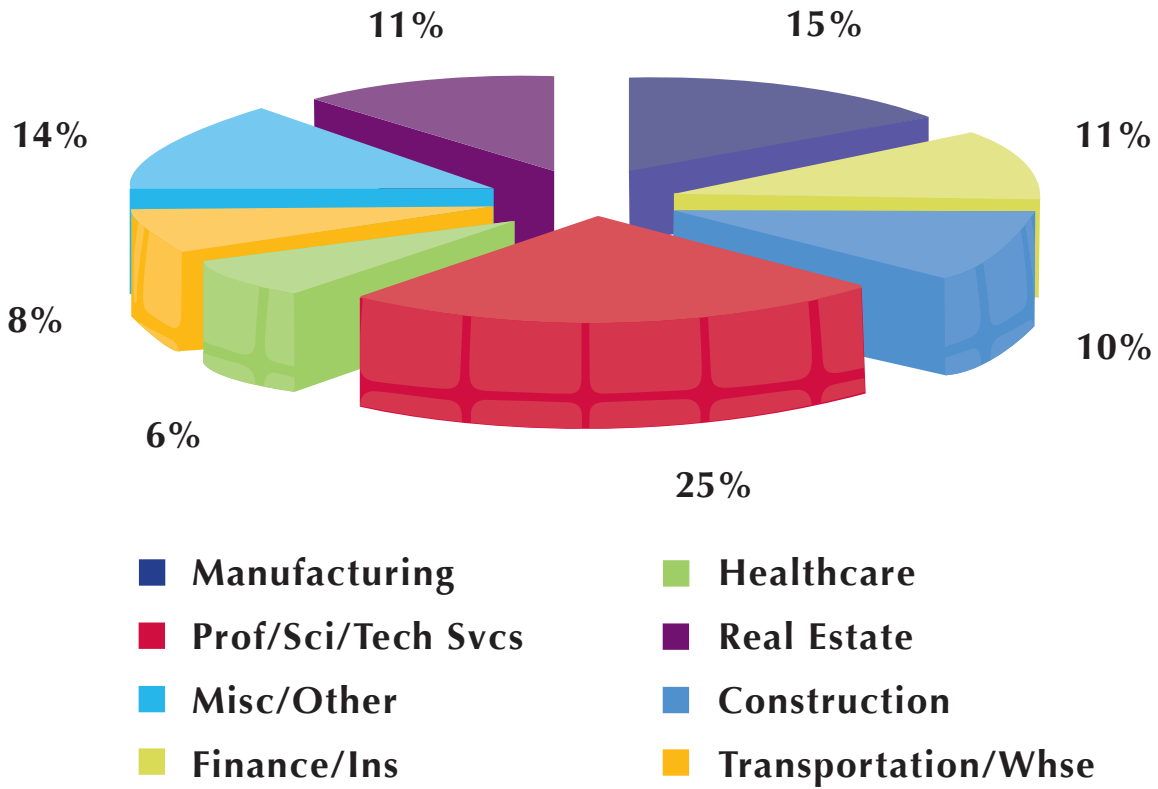
Outcome:

205 interviews/surveys were completed – a 25.6% response to the survey (800 contacts were attempted). A diversified mix of industry clusters was represented including construction, real estate, manufacturing, wholesale trades, professional services, financial services and healthcare. Of the companies surveyed, 147 (72%) were privately held companies, and 124 (61%), identified their presence here in Tampa as their headquarter operation.

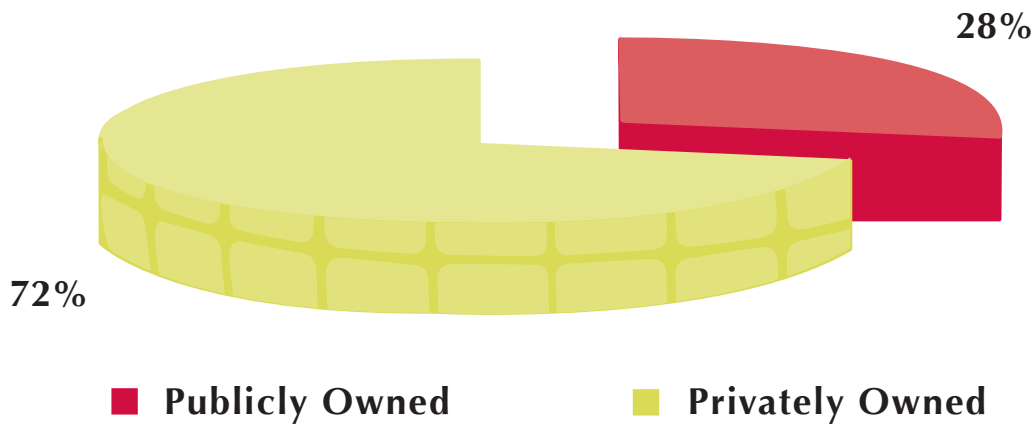
Also, 85% of the companies surveyed said they would recommend our area as a good place to operate a business; 88% reported their average annual income at or above the state's average annual wage of \$33,000.00; and 80% rated the workforce quality good or better than average. With continued analysis in 2006, companies will again be surveyed to demonstrate improvements and further strive to meet local business' needs.

Overall, the survey results show that we still have things we need to work on, but the outcome also shows that we have a solid business climate, and a strong and growing workforce of which we can be proud. We will continue to reach out to our local businesses and work with our community leaders to build upon our continued success as a diverse and thriving business location for national and international firms, but our primary goal is to help our local companies and individuals prosper and grow.

Industry Clusters



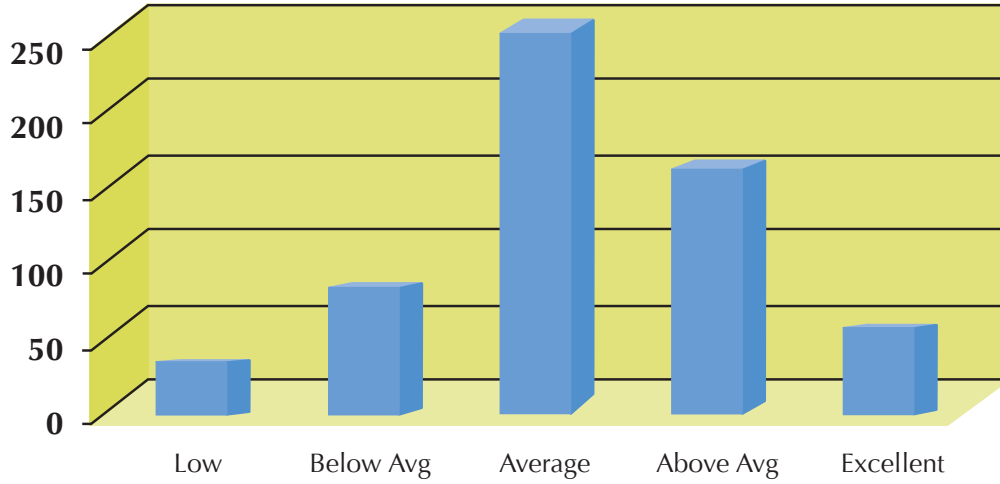
Ownership



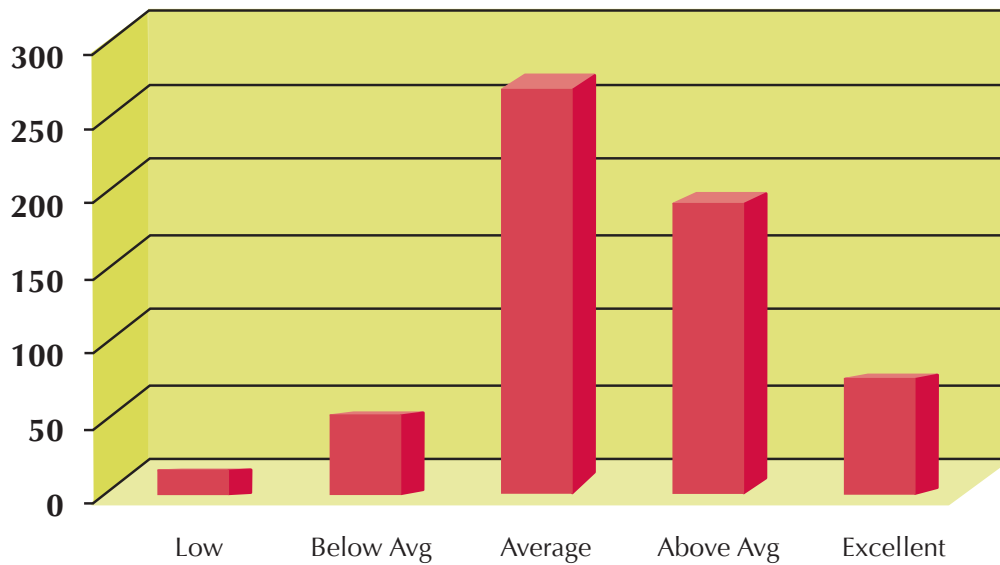
*Of the Publicly Owned, one identified itself as Minority/Woman/Veteran Owned. Of the Privately Owned: 6 are Minority/Woman Owned, 4 are Woman Owned, 5 are Minority Owned.

Workforce

Availability of Qualified Workers



Quality of Workforce



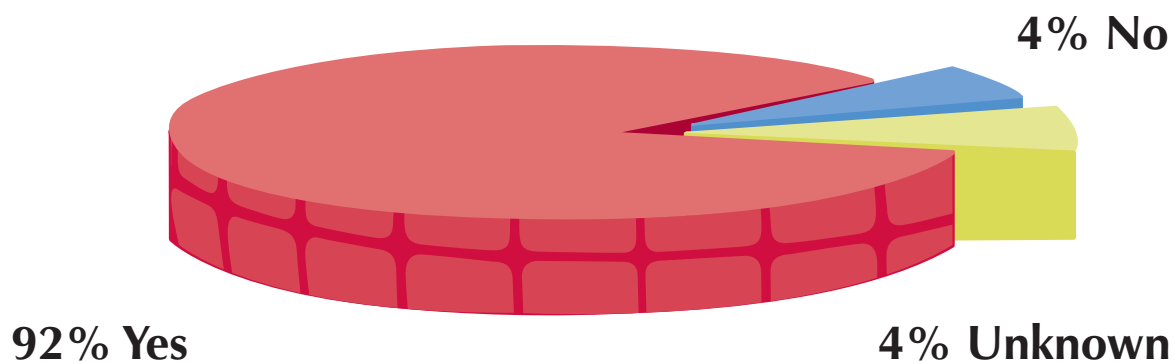
Workforce

Most significant challenges in recruiting

1 = most significant
5 = least significant

- 1 - Access to qualified candidates
- 2 - Cost of Recruiting
- 3 - Educational Attainment/Skills level
- 4 - Cost of Training
- 5 - Access to workforce/labor market info

Would you recommend Hillsborough County as a good place to do business?



Current Workforce Initiatives

The Tampa/Hillsborough County area has been the center of attention over the last 10 years, gaining national, state and local visibility.

Key to this attention is recognition of the area's ability to attract emerging industries and expanding businesses.

This growth has dramatically increased new home construction, community development and infrastructure development creating mass appeal to growing families, single adults and mid-career professionals.

The workplace in Tampa/Hillsborough County is characterized as an excellent location for high-end offices, new economy businesses, port and maritime-related operations, biomedical/ health technologies, and micro-electronic products.

It is one of Florida's leading business centers, with a world-class port, airport, and medical community. It is also characterized as having satisfactory and well skilled non-professional, entry level and experienced workers. It is a workforce that is growing at a rapid pace with great multi-lingual capability.

Future growth will be in technology, biomedical and life sciences, health

services and research arenas. These growth sectors and other changes will present challenges for the employers to find the right talent, for the job seeker to be the right "fit" for the company and for all organizations to focus on continuous development of the competencies-in-demand to remain competitive.

In 2004, the Chamber's Board of Directors transformed what was once the Workforce Development Committee and the Business and Education Committee into what is now called the Education, Employment and Economic Development Sub-committee.

Today, this subcommittee is referred to as E-3 and focuses on leveraging the interdependency and linkages between education, employment and economic development for both our members and the Tampa/Hillsborough community. E-3's leadership is committed to provide the business community a stronger focus on four key action items that the Chamber is uniquely positioned to do and influence. We further believe that these actions not only address the noticeable challenges that employers face but they also address what lies beneath those challenges.

The following key action items will be addressed over the next 36-months:

Workforce Initiative Action Items

Access to qualified candidates

Develop a process to determine the workforce needs of companies

Conduct industry specific roundtables and/or forums with the Tampa Bay Workforce Alliance on topics of local importance

Promote the Emerge Tampa demographic as a young professional talent pool

Education Attainment

Promote and support effective local education and training initiatives

Continue to facilitate dialogue between business, education, and workforce development leaders to develop appropriate curriculum

Support the Florida Advanced Technological Education (FL-ATE) grant program to create manufacturing curriculum and technical programs to meet the future skill set needs of manufacturers in our community

Skill Level

Promote the Diploma-see initiative to eighth grade middle school students to help teach students about the value of staying in school

Foster the creation of educational campaigns that emphasize the value of career level certificate of completions and higher educational degrees

Create awareness programs that reinforce the use of certificate of completions as a stepping stone to more high skill high wage opportunities

Access to workforce/labor market information

Promote and raise awareness of the Tampa Bay Workforce Alliance (TBWA) as the leading workforce development organization in the Tampa Bay region; TBWA offers a wide range of services to businesses including market and demographic information

**Greater Tampa Chamber of Commerce
Committee of One Hundred
2005 Local Business Retention & Expansion Subcommittee**

Ms. Anne Adams
The Beaux-Arts Group of Florida, Inc.

Mr. Paul Ayres
Tampa Downtown Partnership

Ms. Sharan Backus
Coldwell Banker Residential Real Estate, Inc.

Ms. Paula Buffa
Advantis Real Estate Services Co.

Ms. Christine Burdick
Tampa Downtown Partnership

Mr. Mark Christensen
TEKsystems

Ms. Mary Clare Codd
Colliers Arnold

Ms. Mary Ann Daniel
Citigroup

Ms. Susan Glow
Taylor White

Mr. Daniel Gura
The University of Tampa

Ms. Lizz Harmon
HarmonTampa, Inc.

Mr. Scott Jacobsen
The Bank of Tampa

Mr. Rich Kay
Mark Fitzgerald's Sandler Sales Institute

Mr. Daniel Kelly
TBO.com

Mr. Lee Kermod
Sago Networks

Mr. Patrick Knight
Tampa Bay Workforce Alliance, Inc.

Ms. Michele Lembo
Marriott Execustay

Ms. Debbie Lundberg
Right Management Consultants

Ms. Susan Miller
Fred. D. Learey Technical Center

Ms. Kathee Mills
Manpower Staffing Services

Ms. Alexis Mootoo
MaaSa Technologies

Mr. Craig Neuman
Maddux Business Report

Mr. Shane O'Neil
Studley, Inc.

Ms. Pam Pester
Carter

Ms. Joyce Prahasky
Exit Extreme Realty & Extreme Mortgage

Mr. Michael Riddle
TelCove Investment, LLC

Mr. John Robinson
Fowler White Boggs Banker PA

Mr. Chris Sass
Cushman & Wakefield

Mr. Kevin Shukur
Bay Cities Bank

Mr. Jon Slater
Studley, Inc.

Ms. Lynn Smith
Interior Design Services, Inc.

Mr. Juan Vega
Carter

Mr. Robert Weiss
Merrill Lynch

Mr. Ryan Wesner
Colliers Arnold

Mr. Dallas Whitaker
Colonial Properties Trust

Mr. Jon Yob
Creative Recycling Systems, Inc.



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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.