

CITY OF OCALA
OFFICE OF BUSINESS & FINANCIAL SERVICES/PURCHASING DIVISION
151 SE Osceola Avenue, 3rd Floor, Ocala, FL 34471

Phone: (352-351-6700) Fax: (352-351-6710)

NOTICE OF REQUEST OF QUALIFICATIONS

ROQ NO: **09-004**

TITLE: **Professional Urban Planning Consultant Services**

Due Date: **3:00 P.M., Friday, September 4, 2009**

Location: **Office of Business & Financial Services/Purchasing Division**
151 SE Osceola Avenue, 3rd Floor, Ocala FL 34471

Proposals will be received by the Purchasing Division at the specified location until the time and date cited above. Only proposals received by the correct time and date will be recorded.

Proposer is to submit one (1) original of a signed and completed submittal package (original must be unbound and marked "original") and nine (9) copies for evaluation use. Proposals must be submitted in a **sealed** envelope or box with the Request of Qualifications number, title, and the proposer's name, address, and telephone number clearly indicated on the package. All proposals must be completed in blue ink or typewritten, or a computer printout with written signature returned by the time and date cited above.

Proposers are strongly encouraged to carefully read the entire Request of Qualifications.

Contact: Jane Hurley, Procurement Manager for technical questions at (352) 629-8215.

CITY OF OCALA

Jane Hurley, Procurement Manager

Issue Date: August 4, 2009

REQUEST OF QUALIFICATIONS

ROQ 09-004

Professional Urban Planning Consultant Services

SECTION 1 – Intent and General Information

1.1 ISSUING OFFICE

This Request of Qualifications is issued for the City of Ocala by the Office of Business & Financial Services/Purchasing Division. All contacts regarding this ROQ are to be directed to:

Jane Hurley, Procurement Manager
City of Ocala
Office of Business & Financial Services/Purchasing Division
151 SE Osceola Avenue – 3rd Floor
Ocala, FL 34471
Phone: 352-629-8215 Fax: 352-351-6710
Email – jhurley@ocalafl.org

1.2 PURPOSE

The purpose of this Request of Qualifications (ROQ) is to obtain competitive proposals from qualified firms or individuals capable of providing professional urban planning consultant services over the next three years that includes the following: evaluating and proposing amendments to the City’s Comprehensive Plan and Land Development Regulations; preparing subarea or redevelopment plans and performing other tasks related to development of the City.

This ROQ provides prospective proposers with sufficient information to enable them to prepare and submit proposals for consideration by the City of Ocala to satisfy the needs as outlined in the scope of services. Proposers are strongly encouraged to carefully read the entire Request of Qualifications.

1.3 PROPOSAL SUBMISSION

All proposals must be received by the City of Ocala Office of Business & Financial Services/Purchasing Division, 151 SE Osceola Avenue, 3rd Floor, Ocala, FL 34471 no later than the date and time shown in the Notice of Request of Qualifications. Each proposal shall consist of one (1) original and nine (9) copies. The original must be unbound and marked “original”. It is the responsibility of the proposer to ensure that their proposal is received in the Purchasing Division prior to the deadline. Proposers should allow ample mail delivery time to ensure timely receipt of their proposals. Proposals received after the above date and time will not be accepted. All proposals must be completed in blue ink or typewritten. All required signatures must be in blue ink.

Proposals must be clearly identified as a proposal for the City of Ocala and shall show the

ROQ number, the title of ROQ, and the proposer's name and address on the outside of the **sealed** proposal package. **Proposals will not be accepted by facsimile transmittal.** Submission requirements are identified in SECTION 3 entitled "SUBMITTAL REQUIREMENTS".

1.4 **INQUIRIES**

Prospective proposers may make written inquiries concerning this ROQ to obtain clarification of requirements. No inquiries will be accepted after **4:00 P.M., Thursday, August 20, 2009**. Questions must be submitted in writing via email (preferred method), mail, or fax to:

Jane Hurley, Procurement Manager
City of Ocala
Office of Business & Financial Services/Purchasing Division
151 SE Osceola Avenue – 3rd Floor
Ocala, FL 34471
Phone: 352-629-8215 Fax: 352-351-6710
Email – jhurley@ocalafl.org

All envelopes containing questions must be clearly marked Inquiry for ROQ 09-004 Professional Urban Planning Consultant Services to facilitate handling and distribution.

1.5 **AMENDMENTS TO ROQ**

If it becomes necessary to revise or amend any part of this Request of Qualifications, the Procurement Manager will furnish the revision by written Addendum. It is the proposer's responsibility to inquire if any Addenda have been issued. Any addenda will be posted to Demandstar www.demandstar.com and on the City's website www.ocalafl.org/purchasing, "Bid Processing Page" link. Any addenda must be acknowledged on the Affidavit of Compliance form.

1.6 **RESPONSE MATERIAL OWNERSHIP**

All proposals become the property of the City of Ocala upon receipt and will only be returned to the proposer at the City's option. Selection or rejection of the proposal will not affect this right. The City shall have the right to use all ideas contained in any proposal received in response to this ROQ. Disqualification of a proposal does not eliminate this right.

1.7 **REJECTION OF PROPOSALS**

The City of Ocala reserves the right to reject any or all proposals, to waive informalities and minor irregularities and to accept any portion of the proposal or all items proposed in response to this ROQ. In addition, the City reserves the right to cancel this ROQ if it is in the best interest of the City to do so. Failure to furnish all information or to follow the proposal format requested in this ROQ may disqualify the proposal. Any exceptions to the Scope of Services or any requirement of this ROQ must be identified in the proposal

on the Affidavit of Compliance Form.

1.8 **ROQ SELECTION COMMITTEE**

The selection committee will meet approximately two weeks after the closing date for receiving proposals. The committee may consist of representatives of the Planning and Development Department, Engineering Department, the Office of Long-Term Planning and Sustainability, the City Managers Office, and other appropriate representatives. The City reserves the right to adjust the makeup of the selection committee. The City shall be the sole judge of its own best interests, the proposals, and the resulting agreement.

1.9 **SELECTION PROCESS**

The Selection Committee will evaluate and rank the written submittals and may require oral presentations or interviews with the top firm(s) or individual(s). Presentations/interviews will provide an opportunity for the proposer to clarify qualifications, approach to the project, and ability to furnish the required services. Presentations would be to the Selection Committee and other City officials as deemed appropriate by the City.

The selection process may involve background checks and on-site visits to proposer's place of business. The selection criteria are included in the ROQ package.

The proposers shall furnish such additional information as the City of Ocala may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The City reserves the right to make investigations of the qualifications of the consultant(s) as it deems appropriate.

1.10 **AWARD**

The City anticipates award to the proposer(s) who submits the proposal judged by the City to be the most advantageous. The City shall be the sole judge of its own best interests, the proposals, and the resulting agreement.

The proposer understands that this ROQ does not constitute an agreement or a contract with the proposer. An official contract or agreement is not binding until proposals are reviewed and accepted by appointed staff, approved by the appropriate level of authority within the City, and executed by the parties.

The City will negotiate prices, payment terms, and contract with the selected consultant(s). Should the City and the selected consultant not reach an acceptable arrangement, the City will begin negotiations with the next ranked consultant.

1.11 **INCURRING COSTS**

The City of Ocala shall not be obligated or be liable for any costs incurred by proposers prior to issuance of a contract. All costs to prepare and submit a response to this solicitation and any appearance at any required presentations/interviews shall be borne by the proposer.

1.12 **ACCEPTANCE OF PROPOSAL CONTENT**

The contents of the proposal of the successful proposer will become contractual obligations if acquisition action ensues. Failure of the successful proposer to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

1.13 **VENDOR SELECTION**

It is the City's intent to select a vendor(s) within sixty (60) calendar days of the deadline for receipt of proposals. However, proposals must be firm and valid for award for at least one hundred and twenty (120) calendar days after the deadline for receipt of proposals.

1.14 **COMMUNICATION WITH CITY STAFF/OFFICIALS**

To ensure fair consideration for all proposers, the City prohibits communication relative to this Request of Qualifications to or with any department, bureau, or employee during the submission process, except as provided in Section 1.1 and 1.4 above. Additionally, the City prohibits communications initiated by a proposer to the City official(s) or employee(s) evaluating or considering the proposals prior to the time an award decision is made. Any communication between proposer and the City will be initiated by the appropriate City Official(s) or employee(s) in order to obtain information or clarification needed to develop a proper, accurate evaluation of the proposal. Such communications initiated by a proposer may be grounds for disqualifying the offending proposer from consideration for award of the proposal and/or any future proposal(s).

1.15 **SITE VISITS**

The City reserves the right to visit any proposer's site at any time.

1.16 **SUBCONTRACTING/ASSIGNMENT**

The use of subcontractors will be allowed to address specific needs that are identified in the scope of services. Contractor shall not assign/subcontract any work without the prior written approval of the City of Ocala. The City of Ocala reserves the right to decline any assignments/subcontracting.

1.17 **TAXES**

The City, as purchaser of services, is exempt from Federal, State, and Local government taxes. The following exemption number appears on the face of the purchase order: Florida Sales Tax Exemption Number 85-8012621655C-9, Federal Tax Number is 59-6000392.

1.18 **VENUE**

The laws of the City of Ocala and Marion County shall govern in connection with the formation, performance and the legal enforcement of any resulting contract.

1.19 **SUBMISSION OF MULTIPLE BIDS**

No proposer may submit multiple bids. Only one (1) submittal will be accepted per individual owner(s)/partners.

1.20 **ADDITIONAL INFORMATION**

- A. The City of Ocala is not responsible for the U.S. Mail or private couriers in regards to mail being delivered by the specified time so that a proposal can be considered.
- B All materials submitted as response to this Request of Qualifications shall become the property of the City of Ocala.
- C. Costs for developing proposals (including travel for presentations and interviews) in response to this Request of Qualifications are entirely the obligation of the proposer(s) and shall not be chargeable in any manner to the City of Ocala.
- D. The City reserves the right to use any and all information presented in any response to the Request of Qualifications. Acceptance or rejection of the proposal does not affect this right.
- E. The names of the organizations submitting the proposals will be recorded at the time of opening.

SECTION 2 – SCOPE OF SERVICES

2.1 BACKGROUND

The City of Ocala is the largest municipality in Marion County, located in North Central Florida. It also serves as the county seat with a 2008 population of 54,462 full-time residents. The City limits encompass approximately 44 square miles, with an additional 19 square miles in the adjacent, adopted Urban Service Area. Named an “All America City” in 1995, Ocala also holds the distinct title of being one of “America’s Top 100 Places to Live in 2002” by Relocate-America.com and was awarded the best medium size City by “American in Bloom in 2007.”

Ocala’s central location to both coasts and other Florida destinations via a strong highway system contributes to the area’s attractiveness for residents and businesses. Over the past few decades, greater Ocala experienced one of the highest growth rates in the country. While the majority of the residential growth has occurred in the County, the City is still the main economic center (retail, office, industrial and health care jobs) in the community. It is estimated that the City of Ocala supports a daytime population of about 120,000 people based on its central location and economic position in the county.

Ocala offers numerous outdoor and recreational opportunities, excellent subtropical climate, 33 city parks, world-renowned Silver Springs Attraction, and the Fort King National Landmark. Enhancing the beauty of the city are 100-year-old Live Oak trees that canopy the streets, along with palm trees, flowering azaleas, dogwoods and crape myrtles. Historic preservation is celebrated in the four historic districts, with some buildings dating from the mid-1800s. Ocala is within close proximity to rolling green fields of horse farms, open space preserves, outstanding golf courses, friendly communities, crystal-clear rivers, and fresh-water springs, the Ocala National Forest, the Silver River State Park, and the State of Florida’s network of trails and greenways.

A crowning jewel in Ocala is the Appleton Museum, a regional landmark and one of the Southeast’s finest cultural assets. The Ocala Civic Theatre offers live, professional-quality musical and dramatic productions and is the second largest community theater in the state. Other art and cultural entities include the historic Marion Theatre, Central Florida Symphony, Marion Cultural Alliance at the Brick City Center for the Arts, the Webber Center at Central Florida Community College and Ocala Storytelling Guild. The City of Ocala also organizes many unique and diverse community activities, such as “One Ocala One America,” and “Light-Up Ocala,” a Christmas-related celebration.

A five (5) member City Council governs the City of Ocala. Four (4) city council members are elected by district and one (1) city council member is elected at-large, with each serving a four-year term. The Mayor is elected at-large for a two-year term. The City functions as a Council/Manager form of government with the administrative responsibilities vested with the City Manager. The City Council appoints the City Manager, City Attorney, City Clerk, Internal Auditor, and Police Chief.

2.2. KEY COMPONENTS

A. *Comprehensive Plan* --- The City’s comprehensive plan is designed to guide and provide

confidence in development of the city, in part through limitations on amendments and requirements for financial feasibility. It is also designed to react to changes within the local jurisdiction. The City's plan includes the elements required by the State of Florida (Section 163.3187, F.S.) plus two optional elements (Historic Preservation and Downtown CRA). The original adoption date for the City of Ocala's comprehensive plan was October 21, 1991 and the last major update occurred in 1998.

Changes to the comprehensive plan come through amendments, revisions to methods of implementation, and in large part through a periodic evaluation of the plan. State law requires the preparation of an Evaluation and Appraisal Report (EAR) approximately every decade. The next evaluation of the City's plan is due April 2011, with the amendments to the plan due no later than one year after the EAR.

B. Land Development Regulations – The City's land development regulations is made up of typical conventional (Euclidean) zoning districts. The City is divided into a series of mapped districts that includes permitted uses assigned to each district. The City's zoning ordinance was adopted in 1965 with new sections added in 1985. The last major update to the land development regulations dates back to the early 1990's when the comprehensive plan was adopted.

C. Downtown -- Like many cities throughout the country, Ocala has seen the decline of activities in its downtown as retailers moved toward outlying areas. Retail activity moved to the southwest area of the City where available land was less expensive and closer to I-75. Nevertheless, while retail activity diminished, government activities remained stable and constant within the downtown along with a core of retail and office uses. Today, Downtown Ocala is still the center of government activity, with both city and county government occupying significant place.

In the 1980s, City leaders became concerned about the overall decline of business opportunities in the downtown. As a result, the City Council with the help of the Downtown Development Commission (DDC) created the Community Redevelopment Area (CRA) and a specific plan to revitalize the downtown area. The CRA contains 108 square blocks and more than 400 parcels of land extending for ten blocks north and south from a central public square.

Beginning in March of 2003 the City embarked on a major planning initiative with the assistance of Moore, Iacofano, Goltsman (MIG), Inc. and Economics Research Associates (ERA) to prepare a master plan for downtown. The intent of that effort was to identify specific market based improvements for downtown that, if implemented, would stimulate further private sector investment and redevelopment of downtown. The City of Ocala Downtown Master Plan was adopted by City Council in January of 2004.

D. North Magnolia Redevelopment Area --- In 1999, the City Council expanded the existing Downtown CRA to include the North Magnolia Area. The area is north of the downtown and includes mainly wholesale, service, office and industrial uses. Many improvement projects have been completed in the North Magnolia CRA, including widening of the road from 2 lanes to 3, new infrastructure along the roadway (decorative light poles & sidewalks), a central park/open space (Merchants Park and Clock Tower), and monument signs throughout the corridor.

Because of the improvements in the North Magnolia Area, a local mortgage company (Taylor, Bean & Whitaker) expanded in the area for a second time by building a new \$20,000,000 facility

to house its corporate offices. The facility was built on a former slaughterhouse and meatpacking (Brownfields) site known as White's Meatpacking, which had been abandoned for 20 years. It took 9 years to remediate and redevelop the site.

E. West Ocala

1. *SR40:* Over the past two years the Governor's West Ocala Neighborhood Revitalization Council (Governor's West) Economic Development and Housing Committees have been looking at issues related to the revitalization of the SR40 corridor west of Pine Avenue. Recent requests to rezone multiple properties near and along the corridor has prompted Governor's West to ask the City for assistance in developing a plan for the SR40 corridor between 27th Avenue and Pine Avenue. An overlay district is also being considered as a way to address issues such as quality and compatibility of development, permitted uses, mixed uses, shared infrastructure, access, parking, stormwater drainage, landscaping/open space, signage, pedestrian/bike traffic and possible architectural and design guidelines.

2. *Houses to Homes:* The City of Ocala has created the Houses to Homes program to provide a concentrated effort in revitalizing residential neighborhoods. This program provides a menu of housing assistance customized for the neighborhood. The assistance includes the following strategies: Façade Grant, Nonprofit New Housing, Housing Rehabilitation, Mortgage Financing Assistance, Property Available for Taxes/Tax Sales/Foreclosure and Impact Fee Credits.

2.3 ASSIGNMENTS

A. The City of Ocala is seeking a highly qualified planning or interdisciplinary firm with pertinent experience in urban design consulting; redevelopment planning; economic development strategies for the housing, commercial and industrial sectors; and land use code/regulation writing. The consultant(s) shall provide a broad range of professional urban planning services over a period of three years, which shall primarily include but not be limited to the following tasks:

1. Develop/assist planning staff in creating a comprehensive plan that is organized around the principles of master planning, and accommodates a form based code. The organizing principles should shift from the existing use based principles to form based principles, which provide flexibility of use but higher standards for architecture and layout at the site, block and neighborhood level.

2. Establish a code that uses physical parameters as standards to achieve desirable form with predictable physical outcomes. Build-to lines, frontage type requirements, etc. should be used as organizing principles rather than numerical parameters such as floor area ratio, density or impervious surface ratio that leave the development specifics impossible to predict.

3. As a component of creating the comprehensive plan outline and the revisions to the land development regulations and associated maps, reduce the number of City land use designations and zoning districts.

4. Prepare redevelopment and subarea plans for designated districts within the City of Ocala. These plans should take into consideration existing development types, character and architecture of the given planning area. Subarea plans may have written and/or visual guidelines or regulations along with a planning map.
5. Provide a residential market analysis and implementation strategies within established neighborhoods and in areas that are undeveloped.
6. Provide an economically viable strategy that promotes the revitalization of the historic center of the city. This strategy should employ policies to promote building of structures that enhance the mixed use, traditional commercial center. Attention should be given to enhancing real estate values and improving the market rate of return for the private sector while serving the needs and desires of the community.

A detailed scope of services and an assignment of duties will be provided for each task that the City contracts with the consultant. The use of sub consultants will be allowed to address certain issues or tasks. Contractor shall not assign/subcontract any work without the prior written approval of the City of Ocala. The City of Ocala reserves the right to decline any assignments/subcontracting.

B. Comprehensive Plan --- An updated plan is needed to ensure that Ocala's quality of life is enhanced and protected as the City continues to grow. The plan shall focus on infill development/redevelopment, developing a strong economic base, business retention model, a financially feasible land use plan, improved mobility, smart growth concepts, neighborhood planning and the protection of natural resources. The plan will serve as a guide for a wide range of decisions concerning land use, design, development and capital improvement priorities. The updated plan will:

1. Identify and address key issues facing the city today and in the future
2. Establish a vision
3. Provide clear and succinct policies and concepts
4. Utilize current and accurate data
5. Be well organized, easy to read and easy to use
6. Eliminate wish items and specific dates/timeframes
7. Dynamic land use plan that enables a design oriented code that is flexible with regard to use
8. Provide a framework for shaping and managing the City's future growth
9. Focus on the physical and economic aspects of the City with an emphasis on developing a land use plan that supports the future growth of the City
10. Incorporate best practices with regards to urban design, transportation, and sustainability
11. Link future growth and development to the Capital Improvements Element
12. Utilize smart growth concepts
13. Provide the framework for developing other plans in the city

14. Present specific implementation strategies and standards for measuring performance

C. Land Development Regulations – The City is proposing the first major overhaul to its land development regulations since the adoption of the zoning code in 1965. The revision to the regulations should be presented as a form-based code that includes the following principals:

1. Street standards, building form standards, use regulations, descriptive building or lot types, and other standards needed to implement the principles of functional and vital urbanism and practical management of growth.
2. Provide diagrams and illustrations showing the location of streets, blocks, public spaces, and other special features. Regulations and plans that include building form standards, such as “build-to-lines” or “required building lines” and building type or form designations for specific areas.
3. Attention to basic building form, placement, and fundamental urban elements to ensure that all buildings complement neighboring structures and the street.
4. Implementation strategies for providing public spaces defined by a variety of building types and uses including housing, retail, and office space.
5. Design attributes and geometries that balance the needs of motorists, pedestrians, bicyclists, and transit riders while promoting a vital public realm. These standards should include design specifications for sidewalks, travel lane widths, parking, curb geometry, trees, and lighting.

D. Redevelopment and subarea plans --- The City will continue to address the needs of specific areas, corridors and neighborhoods throughout the City. Proposed plans will include but won’t be limited to the following: North Magnolia CRA, Downtown CRA, West Ocala/SR 40 Corridor; and Strategic Investment locations (activity centers/subareas).

2.4 PUBLIC PARTICIPATION

A. The public process shall include the following:

1. A kickoff session to introduce the team and to explain the process.
2. Interviews with the appropriate stakeholders involved with the project. These interviews shall include groups and individuals including elected officials, nonprofit organization leaders, property owners, neighborhood representatives, land use attorneys, local design professionals, developers, business organizations, and staff.
3. Design workshops meetings or charrettes organized and led by the consultant, to engage the community, gather ideas and goals, and formulate implementation strategies. The public participation process shall continue throughout the scope of the contract and may include different forums depending on the scope of the project.

4. Interim Results Presentation to City leaders, stakeholders/citizens and staff. This will be a presentation of the findings of the consultant during the interviews and workshops/charrettes, explaining the course of action and an abstract of the expected final documents/work products.

2.5 APPROACH

- A. Become familiar with the physical details of the City including the existing development patterns, scale, height and design.
- B. The City's Planning and Development Department will administer the contract for all work associated with the development and preparation of the project. The department will provide staff to review the progress of the project and be the primary contact for local technical guidance/coordination with other local governments/agencies.

2.6 SUPPORTING DOCUMENTS AND MATERIALS

- A. Comprehensive plan (Goals, Objectives and Policies) (Refer to *Planning's Links of Interest* at www.ocalafl.org/planning.aspx)
- B. Land Development Regulations (Code of Ordinances) (Refer to www.municode.com)
- C. Downtown Master Plan (Refer to *Planning's Links of Interest* at www.ocalafl.org/planning.aspx)
- D. North Magnolia CRA Plan (Copy attached)
- E. Summary of the SR 40 Corridor Study (Copy attached)
- F. Economic Development Plan (Copy attached)

SECTION 3 – Submittal Requirements

3.1 TITLE PAGE

All proposers shall provide a title page showing the ROQ number, the title of services being provided, name and address of firm, telephone and fax number, point of contact and date. The title page must be signed by a representative who is authorized to contractually bind the proposer. The signature block shall show the typewritten name of the individual signing. Each proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the proposer's capabilities to satisfy the requirements of the ROQ. The emphasis in each proposal must be on completeness and clarity of content. All information under this section must be submitted with the proposal in order for it to be responsive.

3.2 PROPOSAL FORMAT

The written proposal must be submitted on 8 ½" x 11" paper, numbered, typewritten, with headings, sections, and sub-sections identified appropriately. The City will accept maps and diagrams on 11" x 17" paper folded in the document.

The proposal must be divided into four (4) sections with references to parts of this ROQ done on a section number/paragraph number basis. The four (4) sections shall be named:

- A. Required Submittals**
- B. Qualifications/Experience/Workload**
- C. Project Understanding, Proposed Approach and Methodology**
- D. Additional Data to Support Proposal (optional)**

3.3 REQUIRED SUBMITTALS (to be included in Section A of your proposal)

The proposer shall submit the required information at the time of submittal of Request of Qualifications. Failure to provide the required information will affect the evaluation of the proposal.

- A. Letter of transmittal:** This letter will summarize in a brief and concise manner, the proposer's understanding of the scope of services and make a positive commitment to perform the work in a timely manner. The letter should name all of the persons authorized to make representations for the company. The Letter of Transmittal shall be signed by a representative who is authorized to contractually bind the company and include the agent's title or authority. The letter should not exceed two pages in length.
- B. Type of Business:** The proposer shall identify the type of business entity involved (e.g.; sole proprietorship, partnership, corporation, joint venture, etc.). The proposer shall identify whether the business entity is incorporated in Florida, another state, or a foreign country.

- C. **FEIN:** Provide the Federal Employer Identification Number of the proposer.
- D. **Principals:** The proposer must name all persons or entities serving, or intending to serve as principals in the proposer's firm.
- E. **Corporate Information:** If a proposer is a corporation, provide a copy of the certification from the Florida Secretary of State verifying proposer's corporate status and good standing, and in the case of out-of-state corporation, evidence of authority to do business in Florida.
- F. **License Sanctions:** List any regulatory or license agency sanctions.
- G. **Acknowledgment of Addenda/Affidavit of Compliance:** If you take any exceptions to any portion of this ROQ, you must so indicate on the Affidavit of Compliance form included in this document. In addition, if any addenda are issued, you must acknowledge addenda, on the Affidavit of Compliance form.
- H. **Drug-Free Workplace Affidavit Form:** Pursuant to Section 287.087, Florida Statutes, each proposer shall complete this form.
- I. **Summary of Litigation:** Provide a summary of any litigation, claim(s), or contract dispute(s) filed by or against the proposer in the past five (5) years, which is related to the services that proposer provides in the regular course of business. The summary shall state the nature of the litigation, claim, or contract dispute, a brief description of the case, the outcome or projected outcome, and the monetary amounts involved. If no litigation, provide a statement to this effect.
- J. **Licenses/Registration:** Provide a copy of your City of Ocala Occupational License and/or any other applicable licenses (if applicable).
- K. **Vendor Registration Form and W-9:** Submit a completed City of Ocala "Vendor Registration Form" and "Department of the Treasury Internal Revenue Service Form W-9". Forms may be downloaded at www.ocalafl.org/purchasing "Download Vendor Registration Form" link.

3.4 **QUALIFICATIONS/EXPERIENCE/WORKLOAD (to be included in Section B of your proposal)**

- A. **Consultants responding to this ROQ must demonstrate the following:**
 - 1. Expertise in guiding and developing a community consensus to support innovative plans
 - 2. Strong graphic and communication skills
 - 3. Experience in identifying, evaluating, codifying, and explaining the essential qualities of community design and character

4. Proficient in drafting and implementing comprehensive plans, land development regulations and subarea plans
5. Expertise in infill redevelopment and land use planning
6. Strong economic development credentials related to land use and capital improvements

B. The proposer shall include qualifications and experience of the firm/individual(s) who will provide the services. The submission must include:

1. Provide a narrative describing the typical approach to projects similar to this one, including the nature of the public process and intended extent of public involvement.
2. Provide a description of general qualifications, the multi-disciplinary nature of the team assembled for this project, specific evidence of relevant experience, and a listing of key personnel that would be available to work on this project.
3. The proposer shall address the priority of the project regarding staff availability and indicate ability and commitment in ensuring the project or services will be performed in a timely fashion and completed on time. Provide a listing of current and projected workload.
4. Summary of plans or codes in progress or completed, with the following information for each:
 - a. Current contact information
 - b. Client type
 - c. Size and scale of geographic area
 - d. Status of project
 - e. Scope of the project/type of development
 - f. Nature of public involvement in formulation of project
 - g. Nature of the proposed plan
 - h. Impact on the community
5. The proposer must provide financial information that would allow the City to evaluate the sufficiency of financial resources and the ability of the business to sustain performance of the contract such as latest audited financial statement or other pertinent information.

3.5 PROJECT UNDERSTANDING, PROPOSED APPROACH AND

METHODOLOGY (to be included in Section C of your proposal)

Describe your approach to performing the contracted work. This should include, but not be limited to, the following points:

- A. Define what services your company is proposing to best serve the City of Ocala's needs. State your project plan, your firm's interpretation of scope and method of approach. You should also include a level of effort plan, which will show the estimated man hours associated with proposed planned tasks.
- B. Identify the desired outcome of the project(s) based on the identified scope of services.
- C. Include a draft chronology of the tasks/events.
- D. Identify any tasks that proposer is expecting City to perform.

3.6 **STATEMENT OF NO PROPOSAL**

If you do not intend to submit a proposal, fill out and return this form only.

SECTION 4 – Evaluation Criteria

All proposals will be evaluated and ranked in accordance with the below listed evaluation criteria. Award will be based on a review of all information provided by the proposer, plus a review of references submitted, and certain objective and subjective considerations.

CRITERIA	WEIGHT
REQUIRED SUBMITTALS & COMPLETENESS OF PROPOSAL (Section 3.2..... thru 3.6)	5%
❖ Has proposer submitted a complete proposal with required information ❖ Is material submitted in required format ❖ Has proposer presented adequate material to support proposal	
QUALIFICATIONS/EXPERIENCE/WORKLOAD (Section 3.4).....	30%
❖ Experience in serving similar municipalities ❖ Staff availability & experience of assigned staff ❖ Relevant references ❖ Current workload of the firm ❖ Ability to perform in a timely manner ❖ Financial Stability	
SUCCESS IN SIMILAR WORK (Section 3.4).....	25%
❖ Accomplishments on behalf of similar Clients	
PROJECT UNDERSTANDING, PROPOSED APPROACH AND METHODOLOGY (Section 3.5).....	40%
❖ Proven understanding of services required ❖ Presented detailed services to be provided and method to provide ❖ Ability to provide full service capabilities	
.....TOTAL	100%

SECTION 5

INSURANCE REQUIREMENTS FOR THE CITY OF OCALA

5.1. INDEMNIFICATION CLAUSE:

The Contractor shall indemnify and hold harmless the City and their elected officials, employees and volunteers from and against all claims, damages, losses and expenses, including legal costs, arising out of or resulting from the performance of this contract, provided that any such claim, damage, loss or expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the Contractor.

5.2. SAFETY/ENVIRONMENTAL:

The Contractor is responsible at all times for precautions to achieve the protection of all persons including employees and property.

The Contractor shall make special effort to detect hazardous conditions and shall take prompt action where necessary to avoid accident, injury or property damage. EPA, DEP OSHA, and all other applicable safety laws and ordinances shall be followed as well as American National Standards Institute Safety Standards. All hazardous spills, accidents, injuries or claims or potential claims shall be reported promptly to the City of Ocala and appropriate emergency officials.

5.3. ADDITIONAL INSURED:

The City of Ocala shall be added to all third party coverage required by and provided for this contract as an "ADDITIONAL INSURED".

5.4. MISCELLANEOUS PROVISIONS:

A. SEVERABILITY OF INTERESTS:

"The Contractor shall arrange for its liability insurance to include, or be endorsed to include, a severability of interests / cross liability provision, so that the City of Ocala (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits."

B. INSURANCE REQUIREMENTS:

These insurance requirements shall not relieve or limit the liability of the Contractor. The City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect the Contractor's interests or liabilities, but are merely minimums." No insurance is provided by the City under this contract to cover the Contractor/Subcontractors."

C. DUPLICATE COVERAGE:

1. Insurance required of the Contractor or any other insurance of the Contractor shall be considered primary, and insurance or self-insurance of the City shall be

considered excess, as may be applicable to claims against the City which arise out of this contract.

2. Insurance written on a "Claims Made" form is not acceptable without Risk Management Department consultation.
3. No work shall be commenced under this contract until the required Certificate(s) have been provided. Work shall not continue after expiration (or cancellation) of the Certificate and shall not resume until new Certificate(s) have been provided.

D. DEDUCTIBLES:

The Contractor's deductibles/self-insured retentions shall be disclosed to the City and may be disapproved by the latter. They shall be reduced or eliminated at the option of the City. The Contractor is responsible for the amount of any deductible or self-insured retention."

E. CERTIFICATES:

The Contractor shall provide a Certificate of Insurance, issued by a company authorized to do business in the State of Florida and with an A.M. Best Company rating* of at least B+, showing the City of Ocala as an Additional Insured. The City of Ocala should be shown as the Certificate Holder, and providing for 30 day cancellation notice.

***Non-rated insurers must be approved by the City Risk Manager.**

5.5. LIABILITY INSURANCE:

"General liability insurance, with combined single limits of not less than \$200,000 per occurrence* shall be provided and maintained by the Contractor. The only aggregate limit acceptable is a "project aggregate" and the Certificate must show an appropriate endorsement (ISO CG2501 or equal)".

If the Commercial General Liability form is used:

Coverage A shall include premises, operations, products and completed operations, independent contractors, contractual liability covering this contract and broad form property damage coverages.

Coverage B - shall include personal injury.

Coverage C - medical payments, is not required.

If the Comprehensive General Liability form is used, it shall include at least:

Bodily Injury and Property Damage liability for premises, operations, products and completed operations, independent contractors, and property damage resulting from explosion, collapse or underground (XCU) exposures.

5.6. BUSINESS AUTO LIABILITY:

Business Auto Liability insurance shall be provided by the Contractor with combined single limits of not less than \$200,000 per occurrence and is to include bodily injury and property damage liability arising out of operation, maintenance or use of any auto, including owned, non-owned and hired automobiles and employee non-ownership use.

5.7. WORKERS' COMPENSATION:

The Contractor shall purchase and maintain Workers' Compensation insurance for statutory requirements and employers liability limits of at least \$100,000 each accident and \$100,000 each employee \$500,000 policy limit for disease and shall be responsible for ensuring that any subcontractor has statutory coverage. The City need not be named as an Additional Insured, but a "subrogation waiver endorsement is required".

5.8 ERRORS AND OMISSIONS:

The responding Consultant will provide proof of Errors and Omissions Insurance, which covers the company and their agents with limits of at least \$1,000,000. This insurance must be written by an insurer who possesses an A.M.Best rating of at least an "A".

5.9 PROFESSIONAL LIABILITY

Professional Liability insurance with an occurrence limit of not less than \$1,000,000 shall be required from the Consultant on all contracts. It is recognized that this type of insurance is only available on a Claims Made basis and Additional Insured endorsements are not available. All contracts for such services shall require the other party maintains this insurance for at least five (5) years beyond the end of the contract.

ROQ 09-004
Affidavit of Compliance

To be submitted with vendor's response

_____ We **DO NOT** take exception to the Proposal Documents/Specifications.

_____ We **TAKE** exception to the Proposal Documents/Specifications as follows:

Company Name _____

ADDENDA

By _____ Proposer acknowledges receipt of the following
(Authorized Person's Signature) addenda:

Addendum No. _____ Date _____

_____ Addendum No. _____ Date _____

(Print or type name and title of signer) Addendum No. _____ Date _____

Company Address _____ Addendum No. _____ Date _____

Telephone Number _____ Toll Free Number _____

FAX: _____ Date _____

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that, (print or type name of firm) _____

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under bid or proposal, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under bid or proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, **pleas of** guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.

"As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".

Authorized Signature

Date Signed

State of: _____

County of: _____

Sworn to and subscribed before me this _____ day of _____, 20__

Personally known _____ or Produced Identification _____
(Specify Type of Identification)

Signature of Notary

My Commission Expires

STATEMENT OF NO PROPOSAL

NOTE: If you do not intend to submit a proposal, please return this form only.

ROQ 09-004 – Professional Urban Planning Consultant Services

City of Ocala – Office of Business & Financial Services/Purchasing Division
151 SE Osceola Avenue – 3rd Floor Ocala, FL 34471

We, the undersigned, have declined to respond on the above noted proposal for the following reason(s).

_____ Insufficient time to respond to the Proposal.

_____ Do not offer this service.

_____ Our schedule will not permit us to perform.

_____ Remove us from you Mailing List.

_____ Unable to meet insurance requirements.

Other (please specify below).

REMARKS: _____

COMPANY NAME: _____

SIGNATURE: _____

DATE: _____ PHONE NO.: _____

CITY OF OCALA
NORTH MAGNOLIA REDEVELOPMENT CORRIDOR
COMMUNITY REDEVELOPMENT PLAN

July 1999

Prepared and Submitted by:

ECOMATRIX
Community Planners, Land Planners, Land Architects
805 SE Fort King Street
Ocala, Florida 34474
(352) 402-9771

- A. Priority #1:** Develop the following key streets to create good traffic flow and accommodate growth: 8th Street Magnolia to Pine; Old Jacksonville Rd from Magnolia to 20th; 14th Street from Magnolia to 8th Avenue; 9th Street from Magnolia to CRA Boundary. Each street should have lighting to deter crime, landscaping, paving, sidewalks, and trees.

Strategies:

1. Meet with Property Appraiser to get current projections for growth in CRA.
2. Meet with City Engineering to determine linear foot cost for developing all types of roads being considered including costs for sidewalks, lighting, landscaping and paving.
3. Determine methods of obtaining the renovation and/or upgrading of infrastructure items by the City: fire flow, water, sewer, electric, gas, and telephone.
4. Further study traffic flow to understand how vehicles enter and leave the corridor. Further refine and determine which roads to complete first, second, third, etc.
5. Strategize and provide means to finance capital improvement plans.

- B. Priority #2:** Identify potential areas of commercial and residential development; create incentives to draw new business establishments to the North Magnolia Corridor; provide funds for façade enhancements to make area aesthetically pleasing; and promote events to draw visitors.

Strategies:

1. Work with City Staff and North Magnolia Merchants' Association to identify potential areas of commercial and residential development.
2. Set up fund to allow for architectural fees and facade grants.
3. Create a committee under North Magnolia Merchants' Association to look for types of desired development. This committee will identify available spaces and apply potential uses.
4. Work with City Staff to continue and expand impact fee waivers.
5. Provide fund for contaminated site cleanup when Brown field grants have been exhausted.
6. Work with Southeastern Livestock Pavilion and appropriate parties to help develop Farmers' Market Day to draw visitors to the area.
7. Work with merchants and land owners to create incentives for new business owners, i.e.: reduced initial startup cost (rent).

- C. Priority #3:** Continue to develop a strong connection to Downtown and adjacent recreation and community facilities: Tuscawilla Park and recreation facilities; Lillian Bryant Park; Southeastern Livestock Pavilion.

Strategies:

1. Consult with North Magnolia Merchants' Association and landowners to create paved linear landscape connection to Tuscawilla Park.
2. Work with community leaders and North Magnolia Merchants' Association to continue site improvements to Lillian Bryant Park.
3. Work with County to promote Southeastern Livestock Pavilion.
 - a. Create Livestock Pavilion day along Magnolia.
 - b. Promote via banner program.
 - c. Merchants provide discounts upon presentation of ticket to Livestock Pavilion events.
4. Work with Downtown Development Commission to create and promote continuous growth and development between governing bodies. Establish effective working rapport.

- D. Priority #4:** Solve homeless problem.

Strategy:

1. Work with North Magnolia Merchants' Association, City, residents and Coalition for the Homeless to find a compassionate solution to this human need.

- E. Priority #5:** Create means for residential growth to include more owner-occupied residents.

Strategies:

1. Work with City Staff, North Magnolia Merchants' Association and other City and County agencies to create and/or implement existing residential development incentives.
2. Eliminate absentee ownership where possible so CDBG funds can be used to fullest potential.
3. Identify current owner-occupied residences and encourage use of CDBG funds for restoration.
4. Encourage selling of non-owner occupied residences.
5. Encourage renovation of owner-occupied residences.

6. Work with Habitat for Humanity and City Staff to choose North Magnolia Redevelopment Area for their next several sites.
7. Work with City to enforce existing code violations.
8. Work with police to increase cruiser patrol to decrease crime.
9. Create Community Watch Program.
10. Research any available Federal and State loans and grants available for slum and blight areas.
11. Develop strong connections between residential community and North Magnolia Corridor to enhance pedestrian flow.
 - a. Special landscaped areas.
 - b. Parks.
 - c. Pedestrian and bicycle friendly walkways.

F. Priority #6: Work with City to decrease crime.

Strategies:

1. Work with Police Chief and City to increase police control.
2. Initiate Neighborhood Watch Program.
3. Initiate Business Watch Program.
4. Work with landowners and City to donate site for police substation (bicycle and horse).
5. Work with businesses and property owners to encourage lighting for added security.

G. Priority #7: Create green space: vest pocket parks and rest areas. Upgrade cemeteries.

Strategies:

1. Identify potential spaces for parks, rest areas, and green ways.
2. Work with current owners of cemeteries to upgrade cemeteries.
3. Work with current owners of cemeteries to create rest areas within its boundaries.
4. Work with local officials to obtain available funding, e.g.: Pennies for Parks, to develop parks.

- H. Priority #8:** Practice effective code enforcement to promote a healthy, safe, and aesthetically pleasing area.

Strategies:

1. Work with local code enforcement to create means to report code infractions.
2. Establish information network to inform businesses and property owners of current codes.

IV. CAPITAL IMPROVEMENTS: FINANCING THE PLAN

Through public meetings, the governing body of the North Magnolia Redevelopment Area has identified and developed Priorities and Strategies (outlined in N. above, page 11). The City of Ocala has also identified infrastructure priorities; these projects and costs are outlined in A. below.

A. PROJECTS AND COSTS

There are five segments that are part of the Community Redevelopment Plan which impact public expenditures: road improvements, traffic improvements, water, sewer, and storm water.

1. Road Improvements

The major component of the traffic circulation system is the roadway network itself. The North Magnolia Community Redevelopment Area has approximately 7.82 miles of roadway not including North Magnolia Avenue. In February 1999, the City Engineering Department performed an evaluation of the condition of the streets in the North Magnolia Community Redevelopment Area. It was determined that slightly over one-half of the roadway (4.6 ±miles) system was in satisfactory condition. The balance of the roadway system (3.2 ±miles) requires corrective measures including recycling, leveling and resurfacing in order to improve the roadway conditions. The roadways are not shown individually on the plans.

PROJECTS AND COSTS - ROADS				
Description	Unit	Size	Unit Cost	Total Cost
Resurface	Miles	1.82	95,000.00	172,900.00
Level & Resurface	Miles	1.24	125,000.00	155,000.00
Recycle	Miles	0.16	150,000.00	24,000.00

Summary of the SR40 Corridor Study

The West SR40 corridor is one of three primary gateways into the City of Ocala. As such the vitality of the corridor is critical to the first impression of visitors and the overall economic development of the City. Within the corridor there are many vacant lots and dilapidated structures. Although West Ocala is rich in history not only to Ocala but to Central Florida, years of disinvestment and blight have left the corridor with no recognizable architectural or historic character.

Due to current economic conditions, real estate investors and developers (many of whom are from out of town/state) have started to purchase lots in the area. Most of these are looking for a quick turn-around and do not have the interest of the community or the City in mind; this has resulted in an increase of requests for rezoning multiple properties along and near the SR 40 corridor. The Governor's West Ocala Neighborhood Revitalization Council (Governor's West) requested help from the City to develop a comprehensive plan for revitalization of the SR40 corridor between NW 27th Avenue and US 441/Pine Avenue. Located adjacent to the downtown area, the identified corridor area stretches for 2 miles and encompasses approximately 71 acres including a 24-acre City park and a 4.6-acre community college facility. A National Register Historic District sits adjacent to the corridor but is not included in the identified study area. The SR40 Corridor Steering Committee was established in July 2008 and has met on a regular ongoing basis. The committee is composed of community leaders, community organization members, property owners, residents and others with a vested interest in West Ocala.

Through a community survey and numerous public meetings, the Steering Committee has identified the needs and desires of the community. While there are a number of large lots along the corridor, there are a greater number of small 40' x 100' lots for which development under the current development code is impractical. The existence of seriously substandard houses and commercial properties, deteriorated structures, overgrown lots, and insufficient infrastructure will also prevent redevelopment from moving forward at a reasonable rate. Budgetary constraints will make it difficult for infrastructure improvements to be made in a timely manner.

The SR40 Corridor Steering Committee is working to develop a Corridor Plan with a proposed overlay district to address community revitalization in the long term as well as the short term. The plan will address issues such as quality and compatibility of development, permitted uses, mixed uses, improved/shared infrastructure, access management, shared parking, stormwater drainage, landscaping/open space, signage, pedestrian/bike traffic and architectural and design guidelines. The plan would also allow the City to address the provisions of SB360 and HB697 to address increased density, mixed-use development, in-fill development, reduction of greenhouse gas emissions, efficient use of infrastructure, and multi-modal transportation (walk, bike, auto, transit). The work accomplished by the West Ocala community is viewed as an opportunity for their work to be used as a pilot project for the reduction of future land use designations and related zoning designations.



A “SUSTAINABLE” OCALA

ECONOMIC DEVELOPMENT

THE BEST WAY TO PREDICT THE FUTURE IS TO CREATE IT*

OUR COMMUNITY VISION

City of Ocala
Office of the City Manager
Office of Long Term Planning and Sustainability
151 Osceola Avenue
P.O. Box 1270
Ocala, FL 34478-1270
Phone 352.629.8401 • Fax 352.629.8391
www.ocalafl.org

In grateful acknowledgement of our elected officials for their vision and leadership

Council Members
Kyle A. Kay, President
Reuben Kent Guinn, Pro Tem
Daniel Owen
Mary Sue Rich
Charles Ruse, Jr.

Mayor
Randall Ewers

* Peter F. Drucker

Table of Contents

INTRODUCTION	i	Emerging Technologies	16
CHAPTER 1		Financial-Professional	16
Our Community Vision		Information Technology	16
A Sustainable Ocala	1	Life Sciences	17
CHAPTER 2		Manufacturing-Industrial	17
Policy and Management		Mixed-Use	18
The Ultimate Test	5	Arts and Entertainment	18
		Recreation and Tourism	18
CHAPTER 3		CHAPTER 6	
The Changing Economy		Strategic Investment Locations	
Ocala's Economic Mix	7	North-West Corridor	21
Current Economy	8	Industrial Corridor	21
Economic Opportunity	9	Airport Commerce Park	22
		North Corridor	22
CHAPTER 4		Central Business District	22
Sustainable Strategies		Southwest Corridor	23
Creating New Jobs	11	Urban Infill District	23
Diversification	12	East Corridor	24
Infrastructure Investment	12	West District	24
Business Retention	12	South Corridor	24
Competitive Utility & Tax Rates	13		MAP
Education & Job Training	13	CHAPTER 7	
		Building Partnerships	
CHAPTER 5		Regional Planning & Cooperation	25
Supporting Target Industries		Cooperative Relationships	25
Aviation-Aerospace	15	Collaboration	26
Clean Energy	15		
Defense	16		

CHAPTER 8

Action Plan

Short Term: 2009	27
Mid-Term: 2010 – 2015	28
Long-Term: 2015 – 2025	29

CHAPTER 9

Toolbox

Office of Long Term Planning & Sustainability	31
Redevelopment Initiative	31
QTI	31
QDSC	32
CITC	32
HIPI	32
QRT	33
IWT	33
Road Fund	33
Rural Incentives	33
Urban Incentives	33
Enterprise Zones	33
Brownfields	34
Technology Incubator	34
Expedited Permitting	34
Customized Assistance	34
Additional Resources	35

CHAPTER 10

There is Only One Team

Community Participation	37
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RESOLUTION	ii
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Introduction

The Purpose of this Plan

This plan is meant as a vision statement and call to action, it acknowledges our strengths and weaknesses, it outlines sustainable strategies for growing our economy, and it identifies target industries and strategic investment locations that can result in a positive return on investment to our community.

This plan establishes the role of the Office of Long Term Planning and Sustainability and includes specific action items, timelines, and division of responsibility. This plan reminds us that we must work together if we are to succeed.

Our Community Vision

A Sustainable Ocala

A Plan for future development must be based on a vision for the future of the community. Such vision rarely offers a great level of detail, but provides an essential framework and a set of benchmarks, or objectives that help to articulate where a community is headed. This section of Ocala’s Economic Development Plan outlines that broad vision for the future of the City.

The Vision – A sustainable city is one that meets its current needs without reducing its capacity to meet its needs in the future. A City is sustainable environmentally only if it consumes its natural resources at the same rate as it replenishes them. It is sustainable economically only if it derives the maximum benefits possible from local wealth and resources and invests that wealth

Sustainable Development

“Decisions and choices made today should not limit the choices and opportunities of future generations.”¹

back into the community. It has sustainable government only if its citizens have equitable, just, and full access to decision-making. It is sustainable socially only if it meets the basic needs of health, safety and welfare.

In order to support such hallmarks of sustainability as efficient, economical alternative transportation systems and a thriving business sector that offers skilled, medium and high-wage jobs, Ocala must grow. The need to concentrate growth in the region’s urban core raises conflicts that are inherent to any effort to attain sustainability. How do we provide adequate housing for a growing population and still preserve open space? How do we encourage new businesses to locate in Ocala/Marion County, spurring high quality job growth, yet minimize the impacts of traffic in the City? How do we maintain a high level of municipal services while keeping them affordable?

The first and most important step in achieving sustainability is to understand what it means to us, to be willing to envision how things can be, and to understand that it is both attainable and necessary. The next step is to develop an action plan, a flexible roadmap that if followed will achieve the vision. The final step is to have the courage to work together, side-by-side to take the first step.

¹ Sustainable Development: The Very Idea. <http://www.mnplan.state.mn.us/press/veryidea.htm>

If we succeed, Ocala in the future will remain at the core of a regional population, it will serve as an economic and cultural center with concentrations of mixed-use development surrounded by residential neighborhoods and open space; a diverse housing stock that serves all income levels and family situations; high quality arts and recreational opportunities.

If we succeed, significant public and private investment will have improved the quality of our environment and public acquisition and creative site planning will have permanently protected significant natural areas and important natural and recreational systems for the benefit and enjoyment of current and future generations.

If we succeed, Ocala's built environment will reflect a legacy of moderately scaled buildings, high quality urban design, and a rich architectural heritage. Unique design characteristics of each neighborhood will have been retained, while new construction and public investment respects the city's historic character while effectively meeting the demand for continued growth.

If we succeed, Ocala will be served by a regional transportation system that offers a range of mode choices that are safe, affordable, efficient, and convenient for residents, employees, and visitors. Rail, transit, cycling, and walking are increasingly more competitive with the automobile as the dominate mode of choice. Ocala's residential streets will have been reclaimed as attractive public spaces including trails and paths providing access between neighborhoods and areas of protected open space.

If we succeed, Ocala is Marion County's core educational, health care, commercial, cultural, and governmental center. A diverse mixture of businesses sustains the city's economic base including vibrant neighborhood centers served by neighborhood-oriented local businesses. The downtown will abound with cultural and recreational opportunities while serving as a retail and financial center for the region: the equine industry will have reinforced its presence as a fundamental economic sector in this community and primary mechanism of land conservation and open space. Emerging technology based manufacturing firms will expand in Ocala offering well-paying and high quality jobs. Large distribution, warehouse, commercial-retail and office facilities will be constructed at the Airport commerce park.

If we succeed, Ocala's economy has become more self-reliant and diversified through significant increases in local ownership and control of businesses and reinvestment of local resources. Ocala residents, who were not fully participating in the city and regional economy, now have access to meaningful jobs paying a livable wage, job training, and job retention services.

If we succeed, Ocala will place a priority on maintaining and upgrading existing facilities and infrastructure over new construction. City services and facilities will be managed in order to maximize efficiency, conserve resources, and support increased levels of development without degrading the natural environment or unnecessarily burdening the taxpayers.

If we succeed, Ocala is a leader in the development and implementation of energy efficiency measures that reduce energy costs, enhance environmental quality, improve security and sustainability, and enhance economic vitality.

If we succeed, Ocala is a part of the region that has been successful in balancing employment growth with that of housing and finding equitable solutions to sharing the responsibility of

providing affordable housing. In Ocala, people have access to safe, decent, and affordable housing. Ocala's housing needs are being met through rehabilitation and conservation of existing stock, and creative infill.

If we succeed, Ocala's educational institutions, in partnership with families and the community, educate and inspire students to influence and shape the future. The City's educational system prepares our youth to be contributing members of our society providing them with the skills necessary to be successful in the workforce and instilling in them a lifelong commitment to learning.

If we succeed, Ocala's residents participate meaningfully in decisions that affect them. The community has been empowered to be active participants in local decision making. Neighborhood and citywide groups, as well as individuals and adjacent communities, have a clear voice in a city policy-making process that is open and accessible.

If we succeed, Ocala will work in partnership with other community partners, both public and private, to share resources for the overall public good.

If we succeed, Ocala will recognize that we cannot bemoan sprawl, traffic congestion, a stagnant population, or the erosion of families unless we're prepared to grow as a City. We will be willing to financially invest in the community with a realization of a financial return over time to the community.

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Policy and Management

The Ultimate Test...

The ultimate test of management is performance. The City of Ocala has to regain a modicum of performance capacity. Management creates economic and social development. Economic and social development is the result of management. This means that management is the prime mover and that development is the consequence. Development in other words, is a matter of human energies rather than of economic wealth and the generation and direction of human energies is the task of management.²

The City of Ocala will...

“A City that focuses only on the short term will have a higher risk of financial hardship...”

- Streamline the permitting and land development review process while ensuring that the community’s interests and safety are protected.
 - Adopt ordinances that will promote long term sustainable development.
-
- Take specific actions to strengthen a diversified economy and work actively to retain existing businesses and jobs.
 - Promote and support locally owned and controlled small businesses including home occupations appropriate to the character of the neighborhood.
 - Partner with the private, not-for-profit, and other governmental sectors to support existing businesses, attract future development, and conduct joint marketing.
 - Invest in necessary public infrastructure to include transportation, both vehicular and rail, and utility infrastructure to strengthen commercial and industrial centers.

² Peter F. Drucker with Joseph A. Mactariello – The Daily Drucker, 2004

- Work with neighboring communities, regional agencies, and state and county government to promote land use and development policies that support Ocala's role as a regional growth center.
- Aggressively pursue redevelopment of Downtown to strengthen its role as the center of our community, to create additional housing opportunities, and to create a more vibrant "pedestrian-oriented" shopping and entertainment destination.
- Aggressively pursue the development of site ready large scale development centers in support of industrial, technological, and distribution sites.
- Focus technical assistance, marketing and recruitment for economic development towards target industries.
- Support the Ocala/Marion County Chamber of Commerce "Buy Local" campaign and the Ocala/Marion County Economic Development Corporation (EDC) "Raising the Bar" campaign.

***"To Satisfy the Customer is the Mission and Purpose of Every Business
Including Government"***

The Changing Economy

Ocala's Economic Mix

The City of Ocala is a major economic growth center in Marion County and the State of Florida. As a vital part of the regional growth of Central Florida, Ocala provides jobs and services for residents of the city, county and beyond. Not only does the City host a variety of businesses within its own boundaries, it also contributes directly to economic development activity and opportunities throughout the surrounding region. The City's overall quality of life, reputation as a forward-thinking community, host of urban amenities, and proximity to a wide range of recreational choices, coupled with affordable land, and unique geographic location and transportation network combine to make Ocala and surrounding portions of Marion County, a very attractive location for new, expanding, and relocating businesses.

By encouraging and accommodating growth in Ocala, surrounding communities and their rural working landscapes can be protected from unwanted sprawl development. The growth center concept, with Ocala at its core, must be supported both regionally and locally if this advantage is to be sustained into the future. Ocala's ability to provide critical infrastructure and utility service is the foundation of our sustainability.

Ocala's vitality has traditionally come from its strong retail base, manufacturing/distribution and construction industry. The current state of the local and world economy has caused Ocala to re-think our economic mix and calls for a greater diversity of jobs. Diversity will allow the City to better weather temporary weaknesses in different sectors of the economy. This is a balance the City must strive to develop, maintain, and support in the coming years. The City must also emphasize efforts to retain existing employers by redeveloping investment strategies, providing for return on public investment, providing room for expansion, investing in city infrastructure, developing better customer service appeal, and developing transportation alternatives for workers and the movement of goods.

A strong retail sector keeps the city economy active and strong by attracting residents, visitors and businesses to the City. However, Ocala's position as a retail center will erode over time as retail pockets develop outside of the urban core. Retail jobs, on average, do not pay well and don't offer equivalent benefits of jobs in other sectors. However, these jobs are critical to those seeking secondary, flexible, and/or part-time employment. Manufacturing has traditionally been vital to Ocala because it creates well paying jobs, draws large capital investment to the area, often results in increased utility usage, and strengthens other sectors of the economy.

The Current Economy

According to the Employ Florida Marketplace (www.employflorida.com) the 2008 population of the greater Ocala labor market (Metropolitan Statistical Area) was estimated at 329,418 which represents a 35.5 percent increase from 1998. The total civilian labor force for February 2009 was 140,825 of which 123,570 were employed and 17,255 were unemployed (12.3 percent unemployment rate). This compares to one year ago, when Ocala's unemployment rate was 6.0 percent. The average weekly wage (2nd Quarter, 2008) was \$624 which is the equivalent of \$15.60 per hour or \$32,448 annually (assuming a 40-hour work week). The largest major industry sectors include Retail Trade, Health Care and Social Assistance, Construction, and Manufacturing.

A large segment of the Ocala community has relied on a strong residential development market for job creation. These types of jobs have diminished significantly over the past eighteen months with the on-set of the nation-wide housing crises brought on by an over supply of housing stock coupled with sub-prime lending practices that has resulted in a large number of foreclosures. Residential site development, housing construction, and construction supply providers have been hit hard by the housing crisis.

The Federal Reserve Bank reports that in February 2009, there were 515,531 subprime loans in Florida of which 23.4 percent of homes purchased were in foreclosure and 51.3 percent were in the last 12 months at least one mortgage payment behind. Of the 515,531 subprime mortgages, 61.3 percent are ARM loans with 10.8 percent due to reset in the next 12 months. Nationwide, there were 2,650,083 subprime loans of which 11.8 percent of homes purchased were in foreclosure and 4.7 percent were in the last 12 months at least one mortgage payment behind. Of the 2,650,083 subprime mortgages, 60.7 percent are ARM loans with 13.7 percent due to reset in the next 12 months.

Sharp declines in home prices, surplus in housing inventories, followed by a financial crisis and a steep recession, have rattled consumers and triggered reversals in spending and borrowing. Real gross domestic product—the output of goods and services produced by labor and property located in the United States—decreased at a rate of 6.3 percent in the fourth quarter of 2008. The largest contributors were a downturn in exports and a much larger decrease in equipment and software. The price index for gross domestic purchases, which measures prices paid by U.S. residents, decreased 3.9 percent in the fourth quarter. Real personal consumption expenditures decreased 4.3 percent, compared with a decrease of 3.8 percent in the third. Real nonresidential fixed investment decreased 21.7 percent, compared with a decrease of 1.7 percent in the third. Real residential fixed investment decreased by 22.8 percent, compared with a decrease of 16.0 percent in the third quarter.

The biggest factors behind the reduction in fixed investment borrowing are the housing market turmoil and tightening of credit markets. Nationally, at the end of the 4th quarter of 2008, the delinquency rate of all real estate bank loans was 6.14 percent, compared to 3.02 percent at the end of the 4th quarter of 2007. The highest increase in delinquency rates between the two time periods was in residential real estate. The second highest was in commercial real estate. Similarly, at the end of the 4th quarter of 2008, the charge-off rate of all real estate bank loans was 1.79 percent, compared to .44 percent at the end of the 4th quarter of 2007. At the national level, corporate profits decreased \$250.3 billion in the fourth quarter, compared with a decrease of \$18.5 billion in the third quarter.

Economic Opportunity

According to Enterprise Florida, the August 2008 edition of Inc. Magazine ranked Florida 4th in the Nation with 22 of the 263 fastest growing privately-held companies. According to the November 2008 edition of Site Selection Florida is ranked the top state for business climate and according to the Tax Foundation (October 2008) Florida is among the top 5 states for best business tax climates. According to CNBC (July 2008) Florida has the #1 workforce in the Nation and according to the May 2008 edition of Relocate America, Florida has 7 of the top 100 places to live in the Nation, more than any other State and reaffirming its status as having one of the highest qualities of life. Given Ocala's high quality of life, in time it will be poised to join the ranks of the top 100 places to live in the Nation.

Florida's annual economic output is three quarters of a trillion dollars and has a workforce that gains some 200,000+ workers per year. Florida is the 4th most populous state, has the 4th largest labor force, has the 4th highest number of business establishments, has the 4th largest gross domestic product making it the 8th largest economy in the western hemisphere, and the 20th largest economy in the world. Florida ranks 4th in total high-tech industry employment, it is the 6th largest producer of exported goods, and is the 9th largest recipient of foreign direct investment.

Florida has significant benefits to business in that there is no corporate income tax on limited partnerships and S-corporations, there is no state personal income tax and no corporate franchise tax on capital stock. There is no sales and use tax on goods manufactured or produced in Florida for export outside the state. Florida offers sales and use tax exemptions on machinery and equipment used by a new or expanding business to manufacture, produce or process tangible personal property for sale, electricity used in the manufacturing process, and machinery and equipment used predominantly in research and development. Florida is seeking venture capital funds to invest in young companies (especially at Florida universities and research institutions) and therefore has created the \$29.5 million Florida Opportunity Fund. Because of this, an article in the December 29, 2008 edition of the New York Times identified Florida as the next hotbed of venture capital.

The greater Ocala labor force has increased by 40% over the past ten years and is growing with 40% between the ages of 18 and 54. Of residents age 25 or older, more than 83% possess at least a high school diploma and 15% at least a bachelor's degree. Central Florida Community College is the largest provider of higher education offering access to bachelor's and graduate level degrees and an enrollment of nearly 6,000 students. Vocational and technical training is available in Ocala and centrally located within proximity to a number of institutions of higher learning. Ocala is within 67 miles of Orlando, 89 miles of Tampa, 82 miles of Jacksonville, and 40 miles of Gainesville. Ocala has close proximity to major transportation networks including I-75, US-27, US-301, US-441, SR-40, SR-200, SR-464, SR-326, and SR-35. Railroads include CSX and Florida Northern. Ocala/Marion County is at or below the state's average cost of living index including housing which is only 81% of the state average.

“Success Always Creates New Realities”³

³ Peter F. Drucker – The Daily Drucker.

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Sustainable Strategies

To remain vital, Ocala will continue to provide an environment conducive to business, good jobs, and the necessary support – including good housing, childcare, access to services, educational opportunities, and a healthful environment. It will continue to invest in infrastructure. It will support its existing job base and its mix of industry, government, education, health care and tourism while encouraging the creation of new jobs that benefit the worker, the consumer, and the environment.

Creating New Jobs

Although Ocala has experienced an economic boom over the last ten or so years, the current environment and economic downturn has had a definite impact. It would seem that Ocala, to some extent, played the role of the Grasshopper in Aesop's fable,⁴ enjoying a time of plenty while not preparing for the day when the economy built on retail and new home construction would be severely tested.

Ocala has been most effective as an incubator for new, locally owned businesses – a factor that has been important to area job creation. Locally owned and controlled businesses not only create new jobs; they keep local dollars in the City to re-invest in improvements, services, and infrastructure. The continued growth and development of small and locally owned businesses will be a high priority for the future.

It is also important for the City to provide opportunities for existing businesses to grow within the City, and not be forced to move based on land availability, infrastructure support, or for utility/tax considerations. The future development of industrial, commerce and business parks around the city is critical to our future. Such development will require monetary investment, site preparation, and a commitment to invest now for payback at a later time. It is critical that we be site ready so that when opportunity knocks we are ready to invite the customer in. This will also require cooperation between Ocala and Marion County coupled with the efforts of private enterprise.

⁴ Aesop's Fables, Aesop, known only for the genre of fables ascribed to him, mid sixth century BC in ancient Greece

Diversification

One economic strategy that will guide the City into the future is diversification. Traditional economic development has been typically focused on new home construction and the retail that follows additional population. However, as witnessed first hand, when that industry experiences a downturn, or a large employer reduces or closes operations, the impact on the community is significant. The advantage of targeting a broad range of industries and businesses is diversification of risk. Should one segment decline, the others remain to support the overall economy.

Neither manufacturing, tourism, education, small business, health care, finance, nor retail is the single answer to maintaining and improving Ocala's economy – its all of them.

Infrastructure Investment

In most cases, investment in the necessary infrastructure to support future development must occur first in order to attract business growth and opportunities. It is truly a case of “build it and they will come.” Early investment demonstrates a commitment and willingness on the part of the City that business is welcome and supported. Of particular importance will be present and future investment in the City's transportation system, both vehicular and rail as well as infrastructure placement to make the Ocala International Airport and other local industrial/commerce/business parks site ready. We need better parking options to serve workers and customers downtown. We need capacity to load and unload freight by rail. We need high-speed data and communication services that allow residents to work at home or serve technology based businesses, and we need to provide for transportation corridors that support business accessibility.

Business Retention

One of the basic tenets of sustainable development is making the best use of existing resources. It is within this context that the retention and nurturing of existing businesses must be the highest priority. Successful businesses already in place are the best marketing tool Ocala has. The City needs to have a better understanding of the needs of existing businesses, and be in constant dialogue with them to ensure that mutual concerns and objectives can be addressed through cooperation. The Chamber of Commerce, EDC and other partners are currently working to develop an “Economic Gardening” program with this need in mind.

Another aspect that needs more attention is the role that the educational institutions play in developing and sharing new research and technologies and spinning them off into new businesses. Future efforts to combine public and private partners to collaborate on joint projects, define critical issues, and development strategies for future business growth will be encouraged and supported. In addition, a spirit of cooperation between the City of Ocala and Marion County is crucial to the success of both entities. Our philosophy should be one of win-win and not win or lose.

Competitive Utility & Tax Rates

Everything we do is meaningless if our utility and tax rates are so high we cannot compete with other communities. We are committed to on-going efforts in cost reduction, collaboration, and creative energy solutions with an emphasis on keeping rates competitive. We understand that the rates we charge for taxes, utilities and other services have a direct impact on our success as a community. When our citizens and businesses thrive our community flourishes.

Education/Job Training

There is a direct correlation between business sustainability and an adequately trained workforce. We recognize that in order for a community to sustain existing businesses and to attract new business it must partner in the educational and training needs of its community. Ocala is ideally situated to attract and retain an adequately trained workforce. Through our strong existing relationships with Central Florida Community College and its University Center, Workforce Connection, Marion County School Board, Rasmussen College, and other private and public education entities we provide the tools necessary for workforce growth and success. The University of Florida is a 45-minute drive to our north. In addition we are centrally located to University of Central Florida, University of South Florida, Embry-Riddle Aeronautical University, Rollins College, Bethune-Cookman College, the University of Tampa, and Stetson University. We offer an ideal environment for a diverse and growing creative pool of talent.

Ocala Marion County Economic Development Corporation (EDC) in its 2007/08 Report to Investors speaks to our community's workforce initiatives. For a number of years the EDC has been working with partners from Workforce Connection, Marion County Public Schools and a host of business executives to take a new approach to a high school education resulting in the Marion Technical Institute which has been honored as one of the Top 20 High Schools in the nation. Its success has been a community effort and exemplifies what we can achieve for our citizens when we all work together.

“The purpose of government is to make fundamental decisions and make them effectively. The purpose of government is to focus the political energies of society. The purpose of government is to govern.”⁵

⁵ Peter F. Drucker – A Functioning Society

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Supporting Targeted Industries

Ocala realizes that in order to have successful and sustainable economic development, the City must target its energies. Without sacrificing existing businesses and economic diversity, the following industries present the greatest opportunity for future success. These target industries are taken verbatim from Enterprise Florida's Industry Clusters.

Aviation-Aerospace

The presence in Florida of some of the nation's most advanced flight facilities, as well as the world's premier launch complex for space exploration, provides a base for the state's flourishing aviation & aerospace cluster. From space exploration and satellite communications to aircraft manufacturing and flight training, the spectrum of Florida's areas of expertise is very broad in both the aviation and aerospace industry sectors. Florida ranks third in the nation for employment in the Aviation & Aerospace industry (*Governor's Commission on the Future of Space and Aeronautics in Florida, 2006*). Composed of seasoned professionals, former military and recent university graduates, the wide-ranging talents of Florida's workforce in the aviation and aerospace industry are second-to-none.

Clean Energy

In the areas of solar, biomass/biofuels, and ocean energy generation, as well as in fuel cells & hydrogen technologies, Florida firms have the expertise and abilities to capitalize on the momentum created in the clean energy industry. What's more, many Florida companies specialize and innovate in other clean technologies that complement or supplement renewables, improving energy efficiency, management, transmission, and storage, as well as advanced nuclear and fossil energy generation technologies.

In addition, Florida is home to a number of dedicated research centers offering expertise across the spectrum of clean energy technologies as well as in supporting fields like nanotechnology, biochemistry, and engineering. Many of the talented scientists working in them are at the cutting edge of clean energy R&D and often work closely with industry and entrepreneurs to turn research breakthroughs into commercialization success stories.

Defense

Florida is home to one of the nation's largest homeland security and defense clusters, which encompasses a broad range of activities from the manufacture of satellites, tanks, and biometrics to the development of vaccines.

The crucial role that homeland security and defense technologies play in the world today is enabled by the innovation and multidisciplinary convergence of several related industries, such as information technology, photonics, modeling, simulation & training (MST), aerospace, and life sciences. Florida's strengths in each of these industries, its large pool of highly skilled workers, and prominence as a global trade hub combine to provide a solid foundation for HSD companies to innovate and grow.

Additionally, through the help of the Florida Defense Alliance, the state aims to ensure that Florida's resident military bases and missions, and its military host communities are in competitive positions as the United States continues its defense realignment and the strengthening of its homeland security programs.

Emerging Technologies

The future of many industries is being built at the crossroads of new bio-, nano- and micro-technologies and long-established disciplines such as IT, biology, engineering and physics. The blurring of scientific boundaries and the emergence of multidisciplinary fields such as nanotechnology and materials science is bringing a profound shift in Florida's economy. Many companies in the state are focusing on bringing to market technological advancements in fields such as materials science, marine science and nanotechnology, among others. Florida's strengths are most evident in the innovative fields of materials science, nanotechnology, and marine science.

Finance-Professional

Nearly 90% of Florida's gross economic output is generated in the service sector. Florida's nearly 123,000 Financial-Professional companies employ almost 900,000 workers at locations around the state, and the industry's designation as a "high impact" sector, further signifies its importance to the Florida economy. The state's diversified economic structure has enabled it to be a global player in the provision of high value-added services, such as Financial Services (banking, insurance) and Professional Services (legal, accounting, consulting, engineering). The global competitiveness of Florida's high value-added service providers is reflected in the fact that Florida services exports to other countries are valued at over \$27 billion a year.

Information Technology

Computer technologies and telecommunications have become essential components in the success of nearly all types of businesses. Like the completion of the interstate highway system, the high-speed exchange of information and instant communications has dramatically changed not only the way business is done, but where.

Since the birth of the IBM personal computer in Boca Raton, Florida has remained at the cutting edge of technology and innovation in information technology. With more than 24,000 companies

employing nearly 254,000 people, the state has reached a critical mass and remains highly competitive in this area. The talents of multiple organizations are building on each other's unique areas of excellence to develop world-class expertise in several leading fields including modeling, simulation and training, photonics and optics, digital media, software and computer systems design and integration, computer products, microelectronics and precision device manufacturing, and telecommunications. Organizations innovating in these areas can be found around the state, with particularly strong presence in the South and Central Florida regions.

These unique IT clusters have formed in the state as a result of a strong, ongoing cooperation between research institutions, businesses and industry organizations. Innovative modeling and simulation or digital media companies can easily find a regional or statewide industry organization that supports their interests. One such example is the Florida High Tech Corridor Council which is a partnership among the University of Central Florida, the University of South Florida, and the University of Florida, principals of top high-tech companies, and economic development organizations that help promote the growth of the high-tech industry in the 23-county region served by the three universities.

Life Sciences

With over 600 biotech, pharmaceutical and medical device companies and a foundation of nearly 40,000 healthcare establishments, Florida's life sciences cluster continues to gain critical mass around the state. The state's life sciences businesses are thriving, thanks to Florida's increased research capabilities, collaborative environment and pro-business climate. From the increased funding for university biomedical research to the arrival of several esteemed research institutes, and from the growing number of state-of-the-art facilities to the growing ranks of talented scientists working there, Florida's emergence as a life sciences hub has been swift and definitive.

New facilities and programs in Regenerative Health Biotechnology, Marine Biotechnology, Biological Defense, and Brain and Alzheimer's research are only some of the recent additions to Florida's life sciences base.

Manufacturing-Industrial

Ocala will encourage new business development within the environmental and manufacturing sectors. These include environmental testing, engineering, waste management, education, research, audits, remediation, and energy efficiency.

Many Florida manufacturing operations have sprung up in relation to, and continue to benefit from, the presence of advanced research facilities at Florida's universities and colleges, military installations, and NASA. The industry cluster counts nearly 17,000 manufacturers who employ more than 388,000 workers across the state. Florida's manufacturing industries are diverse and include companies in traditional manufacturing such as plastics, food processing and printing, as well as those that are engaged in breakthrough technologies like electronics, medical devices and aviation/aerospace. Florida has a strong, skilled manufacturing workforce, which represents 5% of the state's non-agricultural workforce. Additionally, the state's multicultural and multilingual workforce provides Florida manufacturers with an excellent advantage in conducting business overseas.

Sustainable development must also consider value-added manufacturing and processing of agricultural and equine resource products. In addition to making productive and sustainable use of existing local resources, these types of businesses also provide markets for products produced in the region. This comes back to benefit the community in many ways by supporting local farmers and the surrounding traditional working landscape, and supports our efforts for a high quality of life.

The following target industries are in addition to Enterprise Florida's Industry Clusters:

Mixed-Use

Combining several uses on one site or area in a coordinated way, including office, retail, residential, research and development, and light manufacturing is a planning and development practice that gives mixed-use areas a tighter feel of community in addition to preserving land resources and providing economies of scale. This is especially true in the Downtown urban core where greater dependence on pedestrian activity and multi-modal means of transportation in lieu of the automobile are critical.

Arts and Entertainment

Long before the term "Creative Economy" became known, Ocala has been widely recognized as an arts and entertainment center, and for its cultural diversity. Efforts will continue to support arts and entertainment, which expands economic activity and enhances the city's quality of life. In addition, the arts enliven the city beyond the 9-5 workday – offering a more efficient use of public infrastructure. With the ever increasing expansion of high-speed communications and technology workers are more than ever able to work from home and choose where they live based on affordability and quality of life which will benefit Ocala.

Recreation and Tourism

Ocala already has a very positive image as an environmentally friendly community and is widely recognized as a highly desirable place to live, work and play. These advantages can be used as a powerful economic development tool to attract businesses that place a premium on social and environmental factors when locating new offices and facilities. Ocala has received a number of related awards and recognition including "All America City" designation, the State's "Sustainable Community" designation, and is a winner of both the National and International "America in Bloom" competitions.

Much of Ocala's reputation of high quality of life is based on the abundant recreational opportunities in the area and the city's outstanding natural setting. These advantages also serve as attractions for tourism – coupled with festivals, shopping, restaurants, arts and entertainment. Visitors throughout Marion County and beyond come to take in many of the regional attractions and activities including kayaking, camping, and hiking in Ocala National Forest, glass-bottom boat tours of Silver Springs or to attend meetings and special events like Horse Shows In The Sun, an 8-week series of events showcasing world-class equestrian competition.

These forms of tourism are centered on the inherent character and resources (both cultural and natural) of the greater Ocala area. Tourism creates many jobs in the service sector, especially hotels and restaurants, and the retail sector, bringing vitality and revenue to the area. However, Ocala can best encourage tourism by serving the needs of its residents first, a community that provides excellent facilities and services for its own inhabitants, and has a well established sense of community, will continue to be an attraction to visitors.

“An Opportunity Focused Organization-

Government is Good at Solving Problems – Now Let’s Create Opportunities”⁶

⁶ Peter Stat-Rordam – Changing Strategic Direction

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Strategic Investment Locations

North-West Corridor

This strategic investment location is situated primarily in Marion County. Given its strategic position and geographic reach beyond the city's core development, this area represents the greatest growth potential for mixed-use development and for a partnering opportunity among the city, county and private sector. Revenue-sharing among units of government will be an important component towards achieving optimally efficient development in this area. Adequate infrastructure necessary to serve growth will be a primary consideration among partners.



Industrial Corridor

This strategic investment location is characterized by its excellent transportation network. Interstate I-75 serving as the primary north-south corridor generates ideal opportunities for proximate mid and large size parcels under single ownership to become industrial parks including the Magna property. The construction of NW 44th Avenue facilitates the build-out of potential projects which include BAYI, Ocala West and office parks similar to Meadowbrook. NW 44th Avenue presents an ultimate solution to local governments for added concurrency and capacity eventually linking the industrial corridor with a beltway around Ocala and Marion County.



Airport Commerce Park

This area is situated between two main east-west arteries, SR-40 and SR-200 and lies approximately 3 miles to the west of I-75, the primary north-south transportation route through Central Florida. The airport commerce park property comprises 678 total acres adjacent to the Ocala International Airport with 444 acres identified for industrial use, 113 acres identified for aviation-oriented use, and 121 acres ideal for commercial/professional use. The large land parcels hold the potential to support two large distribution centers, with smaller parcels to support a number of manufacturing operations and the business and commercial services to sustain the vast workforce needed to run these operations. There is also an opportunity to support technology based businesses and business incubation. The transportation infrastructure will easily accommodate importing and exporting of raw materials and finished goods by land or by air.



North Corridor

Serving as the northern gateway into the city, this strategic investment location is comprised of several large undeveloped properties under single ownership. In recent years, several of these parcels along Hwy. 441-301 were under consideration by national large-box retailers.



Central Business District

Specific market-based improvements for the central business district, when implemented, will serve to further stimulate private sector investment and the redevelopment of Downtown. The city's plan to redevelop the Chamber of Commerce and Sprint sites into a mixed-use activity center and the Building Department site into the new Chamber of Commerce will advance the revitalization of downtown and sustain Ocala's prominence in the region. The redevelopment of the Library site into the new home of the Institute for Human and Machine Cognition greatly enhances the city's potential for additional private sector investment.



Southwest Corridor

The southwest corridor represents development opportunities for mixed-use development, primarily multi-family and single family housing especially given the planned “fly-over” extension of SW 44th Avenue where developers have recently expressed interest in the creation of community development districts on large tracts of undeveloped land suited for residential use. There is continued commercial development opportunity along SR-200 west especially within the Heathbrook Development of Regional Impact.



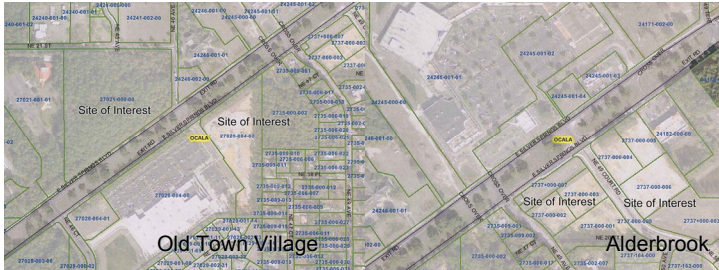
Urban Infill District

SR-200 has experienced tremendous growth for the last two decades and is still viewed as a prime area for in-fill development opportunities in the future. The city’s development efforts for SR-200 will be geared toward meeting new business location and expansion needs for office and retail interests. There continues to be development opportunity within the Paddock Park Development of Regional Impact area and owners continue to infill and redevelop existing sites as evidenced by the recent improvements to the Shady Oaks Shopping Plaza.



East Corridor

This area runs along the SR-40 corridor through the northeast section of Ocala and lies in close proximity to two of the area's most popular natural attractions, the Silver Springs attraction and the Ocala National Forest. In recent years, this area has experienced a renewed development interest as an ideal location for mixed-use development serving northeast Ocala and surrounding Silver Springs, Salt Springs, and Ocklawaha community residents.



West District

This area is defined by NW 27th Avenue to the west, Hwy. 441-301 to the east, and includes the SR-200, SR-40, and US-27 corridors. There are few large tracts of land under single ownership available within this area or along these corridors; however there are efforts underway to bring additional commercial development to this area including effort at the legislative level to establish an Enterprise Zone and local effort to establish a SR-40 development overlay zone by year end.

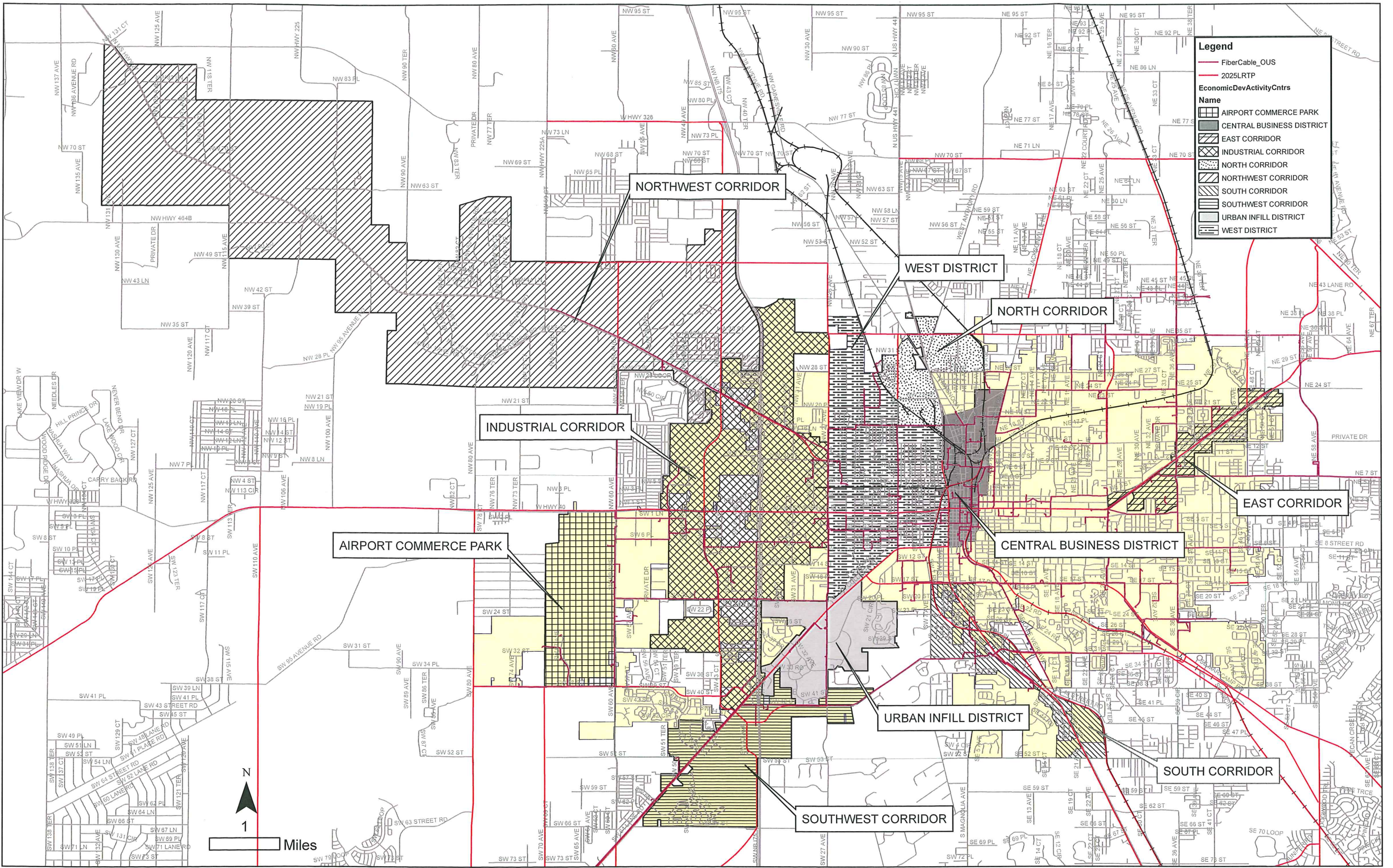


South Corridor

Serving as the southern gateway into the city, this area is defined primarily by older single tenant retail development and industrial type development along Hwy. 441-301. There has been some recent private sector effort to redevelop sites and an interest in capitalizing on the likely increase in rail traffic due to the rerouting of traffic through Ocala.



STRATEGIC INVESTMENT LOCATIONS



Building Partnerships

Planning for sustainable economic development in Ocala cannot occur in a vacuum. Ocala is highly dependent upon a wide range of factors, partners, and relationships including neighboring communities, state and county government, non-profit development organizations, the business community and the general citizenry. The same holds true for development activities within the city. The City and its partners must be in constant dialogue and actively cooperate in order to achieve common objectives.

Regional Planning & Cooperation

The close interdependence between the City and its neighboring communities, inclusive of Marion County demand a regional perspective on a number of issues related to economic development including land use, transportation, utility service, and development itself.

Efforts to work more closely with Marion County, to maximize the best and more appropriate use of resources, to support and attract development and to protect our competitive advantages, must be enhanced. This should include an active dialogue between the public and private sector as well. Infrastructure, services, joint marketing and financing opportunities need to be considered. There may be increased support for an equitable sharing of local tax revenues generated from new development through a greater appreciation of the mutual gains and benefits. Resources and return on investment will be enhanced if we worry less about who wins and who loses and concentrate on win-win regardless of who gets the credit. Likewise, the general citizenry and business community need to understand the need to support investment that postures for mutual gain and benefit.

Cooperative Relationships

The city administration and departments must be in constant dialogue with the business community in order to address mutual needs and concerns. This ranks as a high priority and will be achieved primarily through the Office of the City Manager and Office of Long Term Planning and Sustainability in partnership with current and future public and private entities. Collaborative opportunities between present and future local business, institutions, neighboring communities, and non-profit agencies, exist and should be pursued to their maximum potential.

Collaboration

We are better together than apart; said differently, we are more than the sum of our parts. This is true regardless of the field or endeavor. The following examples illustrate ways in which we have successfully collaborated on projects to achieve common goals.

Marion Technical Institute (MTI)

In 2005 the Marion County School Board with assistance from the Ocala/Marion County Economic Development Corporation, CLM Workforce Connections, Central Florida Community College, Community Technical and Adult Education, and a number of local businesses came together to create the Marion Technical Institute (MTI) which offers high-school students technical training in automotive, building construction, business and finance, culinary arts, industrial engineering, information technology, power industry, and drafting and design. MTI has since been named one of the top 25 model highs schools in the Nation and has provided local businesses with a stream of trained and qualified employment candidates.

Institute of Human-Machine Cognition (IHMC)

In 2008 the City of Ocala and Marion County along with the Ocala/Marion County Economic Development Corporation worked to develop a joint assistance plan to bring the highly esteemed Institute of Human-Machine Cognition (a not-for-profit research institute) to Downtown Ocala. IHMC will create 15 positions averaging \$100,000 annually and will offer scientific outreach and exploration to local students.

Maslow Insurance Company

In 2008 the City of Ocala and Marion County along with the Ocala/Marion County Economic Development Corporation worked to develop a joint assistance plan to bring Maslow Insurance Company's National headquarters to Downtown Ocala. Maslow will create 150 positions averaging \$62,000 annually and will offer a variety of insurance products to local consumers.

Magna Development

In 2009 the City of Ocala and Marion County along with the Ocala/Marion County Economic Development Corporation worked with MEC Holdings, Inc. and the Lincoln Property Company on a multi-year phased development strategy for a 600 acre mixed-use industrial park within the Industrial Corridor. This effort included detailed analysis of the development program, pro forma, and infrastructure related improvements to determine return on investment and cost sharing to ensure viability. This project will be presented to the elected officials for pre-permitting purposes in the near future.

Ocala Business and Industry Forward – Airport Development Plan

In 2009 the City of Ocala and Marion County along with the Ocala/Marion County Economic Development Corporation hosted a symposium unveiling plans to create a 600 acre business park at the Ocala International Airport. The plan includes commercial retail, large distribution and warehousing, office, and space for technology and business incubation.

Action Plan

Strategic Planning

Strategic planning is not a box of tricks, a bundle of techniques. It is analytical thinking and a commitment of resources to action. It is the continuous process of making present entrepreneurial decisions systematically and with the greatest knowledge of their futurity, organizing systematically the efforts needed to carry out these decisions and measuring the results of these decisions against the expectations through organized, systematic feedback. What do we have to do today to be ready for an uncertain tomorrow?⁷ The future requires decisions now. It imposes risks now. It requires action now. It demands allocation of resources, and above all, of human resources. It requires work – now.

Short-Term 2009

Priority	Action Item	Action Date	Lead Agency	Support Agencies
1	Downtown Chamber Building Exchange	2009	City, LTPS	Chamber
2	Airport Pre-Development	2009	City, LTPS	County, EDC
3	Airport Phase I (Design-Permitting)	2009	City, LTPS	County, EDC, Private Sector
4	Downtown Pre-Development	2009	City, LTPS	Private Sector
5	NW 44 th Avenue-Phase I (Grant Administration)	2009	City, LTPS	County, EDC, Private Sector, EDA
6	Magna Pre-Development	2009	City, LTPS	County, EDC, Private Sector
7	Business Expansion-Relocation	Ongoing	EDC	LTPS, County, Chamber

⁷ Managing in a Time of Great Change

8	Redevelopment Initiative	Late 2009	City, LTPS	Chamber, Private Sector
9	Economic Gardening	2009	Chamber	City, County, EDC
10	Blight Removal Initiative	2009	City	LTPS, Private Sector
11	SR-40 Development Overlay (Pilot Program)	Late 2009	City, LTPS	GWONRC, Private Sector

Mid-Term 2010–2015

Priority	Action Item	Action Date	Lead Agency	Support Agencies
1	Airport Phase I (Construction)	2010	City, LTPS	County, EDC, Private Sector
2	Airport Phase II (Design, Permitting, and Construction)	Pending	City, LTPS	County, EDC, Private Sector
3	NW 44 th Avenue-Phase I (Construction)	2010	City, LTPS	County, EDC, Private Sector
4	Downtown Redevelopment (Design, Permitting, and Construction)	Pending	City, LTPS	Private Sector
5	NW 44 th Avenue – Phase II	Pending	City, LTPS	County, Private Sector
6	Magna (Design, Permitting, and Construction)	Pending	City, LTPS	County, EDC, Private Sector
7	Business Expansion-Relocation	Ongoing	EDC	LTPS, County, Chamber
8	Technology Incubator	Ongoing	City, LTPS	County, EDC, CFCC/UF, Private Sector
9	Rail-Port Distribution	2010- 2012	City, LTPS	CSX, Private Sector
10	Renewable Energy Initiative	2010- 2012	City, OEU	LTPS, EDC, County

Long-Term 2015 – 2025

Priority	Action Item	Action Date	Lead Agency	Support Agencies
1	Airport Build-out	Pending	City, LTPS	Private Sector, EDC
2	Magna Build-out	Pending	City, LTPS	County, EDC, Private Sector
3	Business Expansion-Relocation	Ongoing	EDC	LTPS, County, Chamber
4	Passenger/Freight Air Service	Pending	City, Airport	FAA, FDOT, Private Sector

* This list is to be updated annually

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Toolbox

Creation of the Office of Long Term Planning & Sustainability

A distinction that marks a plan capable of producing results is the commitment of key people to work on specific tasks. Unless such a commitment is made, there are only promises and hopes, but no plan. Therefore, the Office of Long Term Planning & Sustainability, under the direction of the City Manager, was created to convert strategic plans to action. The best plan is only good intentions unless it degenerates into work. Work implies accountability, a deadline, and finally, the measurement of results. This Office will work closely, daily, with businesses and partner organizations to grow our economy and to respond to related challenges and opportunities.

The Office is responsible for administering the City's "Economic Investment Program" which is the mechanism through which economic development investment decisions are made. The purpose of the Program is to create economic growth within the Ocala city limits and utility service areas through both the attraction of new business and encouragement of existing business to grow and expand. Under this program the City may, on a case-by-case basis, provide financial and other types of assistance to or on behalf of a company where a positive return on investment to the City and/or the community can be determined.

Redevelopment Initiative

The Office is working closely with City staff to develop a "redevelopment program" to support city-wide infill development and reoccupation of currently vacant storefronts, and will be working closely with the newly created grant writer position and City lobbyist as well as the continued monitoring of opportunities related to forthcoming stimulus funds. The Office will also work closely with the following incentive programs to better leverage resources.

Qualified Target Industry Tax Refund (QTI)

The Qualified Target Industry Tax Refund incentive is available for companies that create high wage jobs in targeted high value-added industries. This incentive includes refunds on corporate income, sales, ad valorem, intangible personal property, insurance premium, and certain other taxes. Pre-approved applicants who create jobs in Florida receive tax refunds of \$3,000 per net new Florida full-time equivalent job created; \$6,000 in an Enterprise Zone or rural county. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job. The local community where

the company locates contributes 20 percent of the total tax refund. There is a cap of \$5 million per single qualified applicant in all years, and no more than 25 percent of the total refund approved may be taken in any single fiscal year. New or expanding businesses in select targeted industries or corporate headquarters are eligible for participation assuming local match support.

Qualified Defense and Space Contractor Tax Refund (QDSC)

Florida is committed to preserving and growing its high technology employment base by giving Florida defense, homeland security, and space business contractors a competitive edge in consolidating contracts or subcontracts, acquiring new contracts, or converting contracts to commercial production. Pre-approved applicants creating or retaining jobs in Florida may receive tax refunds of \$3,000 per net new Florida full-time equivalent job created or retained; \$6,000 in an Enterprise Zone or rural county. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job.

Capital Investment Tax Credit (CITC)

The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax. Eligible projects are those in designated high-impact portions of the following sectors: clean energy, biomedical technology, financial services, information technology, silicon technology, transportation equipment manufacturing, or be a corporate headquarters facility. Projects must also create a minimum of 100 jobs and invest at least \$25 million in eligible capital costs. Eligible capital costs include all expenses incurred in the acquisition, construction, installation, and equipping of a project from the beginning of construction to the commencement of operations. The level of investment and the project's Florida corporate income tax liability for the 20 years following commencement of operations determines the amount of the annual credit.

High Impact Performance Incentive Grant (HIPI)

The High Impact Performance Incentive is a negotiated grant used to attract and grow major high impact facilities in Florida. Grants are provided to pre-approved applicants in certain high-impact sectors designated by the Governor's Office of Tourism, Trade and Economic Development (OTTED). In order to participate in the program, the project must: operate within designated high-impact portions of the following sectors; clean energy, biomedical technology, financial services, silicon technology, and transportation equipment manufacturing or be a corporate headquarters facility supporting international, national or regional operations; create at least 100 new full-time equivalent jobs (if a R&D facility, create at least 75 new full-time equivalent jobs) in Florida in a three-year period; and make a cumulative investment in the state of at least \$100 million (if a R&D facility, make a cumulative investment of at least \$75 million) in a three-year period. Once recommended by Enterprise Florida, Inc. (EFI) and approved by OTTED, the high impact business is awarded 50 percent of the eligible grant upon commencement of operations and the balance of the awarded grant once full employment and capital investment goals are met.

Quick Response Training Program (QRT)

Quick Response Training (QRT) – an employer-driven training program designed to assist new value-added businesses and provide existing Florida businesses the necessary training for expansion. A state educational facility – community college, area technical center, school district or university – is available to assist with application and program development or delivery. The educational facility will also serve as fiscal agent for the project. The company may use in-house training, outside vendor training programs or the local educational entity to provide training. Reimbursable training expenses include: instructors'/trainers' wages, curriculum development, and textbooks/manuals. This program is customized, flexible, and responsive to individual company needs.

Incumbent Worker Training (IWT)

Incumbent Worker Training (IWT) – a program that provides training to currently employed workers to keep Florida's workforce competitive in a global economy and to retain existing businesses. The program is available to all Florida businesses that have been in operation for at least one year prior to application and require skills upgrade training for existing employees. Priority is given to businesses in targeted industries, Enterprise Zones, HUB Zones, Inner City Distressed areas, Rural Counties and areas, and Brownfield areas.

Economic Development Transportation Fund

The Economic Development Transportation Fund, commonly referred to as the "Road Fund," is an incentive tool designed to alleviate transportation problems that adversely impact a specific company's location or expansion decision. The award amount is based on the number of new and retained jobs and the eligible transportation project costs, up to \$3 million. The award is made to the local government on behalf of a specific business for public transportation improvements.

Rural Incentives: Florida encourages growth throughout the state by offering increased incentive awards and lower wage qualification thresholds in its rural counties. Additionally, a Rural Community Development Revolving Loan Fund and Rural Infrastructure Fund exist to meet the special needs that businesses encounter in rural counties.

Urban Incentives: Florida offers increased incentive awards and lower wage qualification thresholds for businesses locating in many urban core/inner city areas that are experiencing conditions affecting the economic viability of the community and hampering the self-sufficiency of the residents.

Enterprise Zone Incentives: Florida offers an assortment of tax incentives to businesses that choose to create employment within an enterprise zone, which is a specific geographic area targeted for economic revitalization. These include a sales and use tax credit, tax refund for business machinery and equipment used in an enterprise zone, sales tax refund for building materials used in an Enterprise Zone, and a sales tax exemption for electrical energy used in an enterprise zone.

Brownfield Incentives: Florida offers incentives to businesses that locate in brownfield sites, which are underutilized industrial or commercial sites due to actual or perceived environmental contamination. The Brownfield Redevelopment Bonus Refund is available to encourage Brownfield redevelopment and job creation. Approved applicants receive tax refunds of up to \$2,500 for each job.

Technology Incubator

Over the next five years the City will be working with the County, EDC, CFCC, the University of Florida, and private enterprise to establish a technology-based business incubator. This facility will provide an applied manufacturing outlet for the research and development activities occurring within our institutions of higher learning. This facility will allow related startup businesses an opportunity to incubate until they are ready to fully enter the marketplace.

Expedited Permitting

The City offers an expedited permitting and review process for projects that are facilitated through the Office of Long Term Planning and Sustainability. This program allows for early and direct access to key staff to identify issues and potential solutions early in the process and a commitment to complete all required reviews in an expedited manner.

Customized Assistance

Many projects include special or unique problems or issues that may threaten the projects viability. Whether the issue is timing, zoning, land development regulations, permitting, or financing among others, the City is willing to offer customized assistance for projects demonstrating a strong return on investment.

Additional Resources

Catalog of Federal Domestic Assistance – <http://www.cfda.gov/>
Central Florida Community College – www.cf.edu
City of Ocala, City Manager's Office – <http://www.ocalafl.org/cmo.aspx>
City of Ocala, Office of Long Term Planning and Sustainability (LTPS) – <http://www.ocalafl.org/ltps.aspx>
Community Development Financial Institutions Fund – <http://www.cdfifund.gov/>
Community Development Society – <http://www.comm-dev.org/>
Division of Corporations/Partnerships/Sole Proprietors – www.dos.state.fl.us
Enterprise Florida – <http://eflorida.com/>
Florida Business Links – <http://www.myflorida.com/taxonomy/business/>
Florida Small Business Development Center Network – <http://www.floridasbdc.com/>
Florida's Website – eog.myflorida.com
Heart of Florida – <http://www.heart-of-florida.org/>
International Economic Development Council – <http://www.iedconline.org/>
Marion County Florida – <http://www.marioncountyfl.org/>
Marion County Property Appraiser – <http://www.pa.marion.fl.us/>
Marion County Tax Collector – <http://www.mariontax.com/>
Marion Regional Manufacturers Association – <http://www.mrma.net/>
National Association of Development Organizations – <http://www.nado.org/>
Ocala Marion County Chamber of Commerce – <http://www.ocalacc.com/>
Ocala Marion County Economic Development Corporation – <http://www.ocalaedc.org/>
Ocala Marion County Visitors and Convention Bureau – <http://ocalamarion.com/>
Office of Tourism, Trade, and Economic Development – http://www.flgov.com/otted_home
One Stop Workforce Connection – <http://www.clmworkforce.com/>
US Patent and Trademark Office – <http://www.uspto.gov/>
US Small Business Administration – <http://www.sba.gov/>

Governor's West Ocala Neighborhood Revitalization Council (629-8321)
North Magnolia Merchant's Association (629-8529)
Downtown Business Alliance (629-8529)
Downtown Development Commission (629-8529)

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There is Only One Team

Community Participation—People Power Brings Sustainable Benefits

The Ocala/Marion County Economic Development Corporation and the Ocala/Marion County Chamber of Commerce, their investors, officials, and community leadership should be commended for stepping up and taking the lead in bringing a consensus approach to job creation and retention. All have worked in concert to position our community to be a more competitive environment for job growth. The EDC and Chamber have proven that truly we are better when we work together. For the task of economic development and job creation is a task that must be shared by all.⁸

Community participation...is critical to community success

Community participation is one of the key ingredients of an empowered community. Participation is the heart that pumps the community's life blood – it citizens – into the community's business. But community participation is far more than a requirement, it is a condition for success. Studies have documented that communities that engage their citizens and partners deeply in the work of community development raise more resources, achieve more results, and develop in a more holistic and – ultimately – more beneficial way.

“If Ocala/Marion County is, at long last, going to resolve at least some of the challenges stagnating on its to-do list, it is going to take ‘citizens’ stepping forward.”⁹

Yet, even with a concerted effort and a united front, each and every partner, whether an individual or an organization, we each must do our part. The City of Ocala acknowledges and accepts our role in this important community mission. We have stepped up, we will step out, and we will be in a “constant state of readiness.”

⁸ Ocala/Marion County EDC, Job Creation is Job #1, Brian O'Connor, Chairman, selective comments

⁹ Ocala Star Banner, December 4, 2008, Citizenship Test