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Local Government Economic Development Incentives Survey for FY 2017-18

Overview

Thank you for taking the time to complete this survey.

Before starting the online survey, you may find it useful to first print the PDF of this survey questionnaire and use it when gathering the required information. This PDF can be accessed and printed from the Florida Legislature's Office of Economic and Demographic Research (EDR) website via the following link:

<http://edr.state.fl.us/Content/local-government/economic-development-incentives/index.cfm>

With the exception of municipal governments having annual revenues or expenditures less than \$250,000, counties and municipalities are required by law to report the economic development incentives granted during the previous fiscal year if the amount of incentives granted in total are in excess of \$25,000 during that year.

Prior to this year, counties and municipalities were instructed to exclude the economic development incentives granted by any applicable Community Redevelopment Agency (CRA) from their representative survey response. However, new this year, CRAs are being asked to complete a separate survey response.

The fiscal year referred to in this survey is the Local Fiscal Year that ended September 30, 2018.

Please note that the survey response deadline has been extended to Thursday, February 28, 2019.

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

Additional Reporting Requirements

In addition to responding to this survey, additional reporting requirements are required by law.

Section 125.045(4), Florida Statutes, specifies that a contract between a county's governing body (or other entity engaged in economic development activities on behalf of the county) and an economic development agency (EDO) must require the EDO receiving county funds to submit a report to the county detailing how the county funds were spent and the results of the efforts on behalf of the county.

Section 166.021(8)(d), Florida Statutes, specifies that a contract between a municipality's governing body (or other entity engaged in economic development activities on behalf of the municipality) and an EDO must require the EDO receiving funds to submit a report to the municipality detailing how the funds were spent and the results of the efforts on behalf of the municipality.

By January 15th of each year, the county or municipality must submit a copy of the report to EDR and post the report on their website.

EDR has recommended items of interest that should be included in the EDO's report. These, along with other pertinent information, can be found on EDR's website via the following link:

<http://edr.state.fl.us/Content/local-government/economic-development-incentives/index.cfm>

The local government should submit a copy of the report to EDR at the following address:

Steven O'Cain
Office of Economic and Demographic Research (EDR)
111 West Madison Street, Suite 574

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

Survey Introduction

Sections 125.045(5) and 166.021(8)(e), Florida Statutes, impose the economic development reporting requirements that will be satisfied by the submission of this survey questionnaire. For purposes of this questionnaire, economic development incentives granted by the local entity (county, municipality, or CRA) should be categorized into the one of the following classes:

- 1. DIRECT FINANCIAL INCENTIVES** - Direct financial incentives of monetary assistance provided to a business include, but are not limited to, grants, loans, equity investments, loan insurance and guarantees, and training subsidies. CRA's should only report economic development incentives to businesses funded through Tax Increment Financing (TIF).
- 2. INDIRECT INCENTIVES** - Indirect incentives in the form of grants and loans provided to businesses and community organizations that provide support to businesses or promote business investment or development. Incentives appropriated to Industrial Development Authorities (IDAs), Community Development Districts (CDDs) and Small Business Development Centers (SBDCs) from the county or municipality should be reported as indirect financial incentives. If the county or municipality appropriates any non TIF-generated funds to CRAs, such funds should be reported as indirect financial incentives.
- 3. FEE OR TAX-BASED INCENTIVES** - Fee-based or tax-based incentives, including, but not limited to, credits, refunds, and exemptions.
- 4. BELOW MARKET RATE INCENTIVES** - Below-market rate leases or deeds for real property.

EDR will report to the President of the Senate, the Speaker of the House, and the Department of Economic Opportunity the results of this survey responses including summarizing the responses by incentive type. The completed report will be posted to EDR's website via the following link:

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Local Government Type

*** 1. Are you completing this survey on behalf of a county, a municipality, or a Community Redevelopment Agency (CRA)?**

- County
- Municipality (i.e., city, town, village)
- Community Redevelopment Agency (CRA)

[Prev](#)

[Next](#)

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

County Government Identification

*** 2. Which county government do you represent?**

County Government

Please Select

Manatee

Prev

Next

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Qualifying Question

*** 3. During Fiscal Year 2017-18, did the county, municipality, or CRA give businesses, either directly or indirectly, economic development incentives totaling more than \$25,000?**

Yes

No

[Prev](#)

[Next](#)

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

What qualifies as direct financial incentives?

We will now ask you about the types of incentives granted to businesses during Fiscal Year 2017-18. The first category is direct financial incentives.

Direct financial incentives are provided through grants, loans, equity investments, loan insurance and guarantees. These programs can address business financing needs, workforce training, market development, modernization, and technology commercialization activities.

Direct financial incentives also include local financial support funding matches required by state incentives negotiated by the Florida Department of Economic Opportunity such as the Qualified Target Industry Tax Refund (QTI)* or the Quick Action Closing Fund (QACF). Also included are direct incentives offered in combination with other local governments.

Direct financial incentives are generally project-specific, contingent on pre-award review and evaluation, and typically performance-based.

Do not include payments or benefits to businesses from Industrial Development Authorities (IDAs), or any state or federal funds (i.e., CDBG funds, etc.), which the local government has the discretion to distribute. CRA's should only report economic development incentives to businesses funded through Tax Increment Financing (TIF).

* While the Qualified Target Industry Tax Refund is contingent on the business paying certain state or local taxes, the incentive itself is a grant award.

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Direct Financial Incentives Description

5. Please give the total value for each direct financial incentive type granted during Fiscal Year 2017-18. If none, please enter 0.

Grants

Loans

Equity Investments

Loan Insurance

Loan Guarantees

Training Subsidies

Local Match (QTI, QACF, etc.)

Other

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Direct Financial Incentives

*** 4. Were any Direct Financial Incentives of monetary assistance provided to one or more businesses during Fiscal Year 2017-18?**

Yes

No

[Prev](#)

[Next](#)

Loan Insurance

Loan Guarantees

Training Subsidies

Local Match (QTI, QACF, etc.)

Other

6. Please indicate the number of businesses that received each direct financial incentive type during Fiscal Year 2017-18. If none, please enter 0.

Grants

Loans

Equity Investments

Loan Insurance

Loan Guarantees

Training Subsidies

Local Match (QTI, QACF, etc.)

Other

* 7. How many total businesses received a direct financial incentive of monetary assistance during Fiscal Year 2017-18?

Please total your responses.

* 8. What is the total amount of the direct financial incentives granted during Fiscal Year 2017-18?

Please total your

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

Have you granted indirect financial incentives?

We will now ask you about indirect financial incentives.

Indirect financial incentives include grants and loans to local government entities, nonprofits, and organizations to support business investment or development. The recipients include communities, financial institutions, universities, community colleges, training providers, venture capital investors, and business incubators. Funds are provided to the intermediaries in the form of grants, loans, and loan guarantees.

Indirect financial incentives are generally contingent on pre-award review and evaluation, and such incentives may be performance-based.

General payments to Small Business Development Centers (SBDCs) do not qualify as an Indirect Financial Incentive, unless payments are specifically for training of an expanding or relocating business, or part of a specific economic development initiative. Economic Development Incentives appropriated to Industrial Development Authorities (IDAs) and Community Development Districts (CDDs) from the county or municipality should be reported here under indirect financial incentives.

While many jurisdictions do business marketing and recruitment "in-house," some contract with a private Economic Development Organization (EDO), or contribute dues to a regional EDO which provides such services to local governments across a defined region. Some EDOs also develop incentive agreements, subject to local government approval. These funds should be identified.

If the county or municipality appropriates any non TIF-generated funds to CRAs, such funds should be reported as indirect financial incentives.

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Indirect Financial Incentives

*** 10. Were any Indirect Financial Incentives provided to one or more businesses or organizations that support or promote businesses during Fiscal Year 2017-18?**

Yes

No

[Prev](#)

[Next](#)

Exit this survey



Local Government Economic Development Incentives Survey for FY 2017-18

Indirect Financial Incentives Description

11. Please give the total value for each indirect financial incentive type granted to businesses and community organizations that provide support to businesses or promote business investment or development during Fiscal Year 2017-18. If none, please enter 0.

Grants

Loans or Loan Guarantees

Value of contract with or dues paid to EDOs

Appropriations to IDAs for economic development purposes

Appropriations to CDDs for economic development purposes

Appropriations to SBDCs for economic development purposes

County or municipal appropriations of non TIF-generated funds to CRAs

12. Please indicate the number of businesses and community organizations that provide support to businesses or promote business investment or development that received each incentive type during Fiscal Year 2017-18. If none, please enter 0.

Grants

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

Have you granted fee or tax-based economic development incentives?

We will now ask if you have granted fee or tax-based economic development incentives.

Tax-based incentives use the tax code as the source of direct or indirect subsidy to qualified businesses. In most instances, tax-based incentives are awarded upon verification of eligibility and may not be subject to pre-award review and evaluation like direct incentives.

Florida's counties and municipalities and their CRA's as a unit within are limited in their ability to offer tax-based incentives, either for economic development or for other purposes. With the exception of ad valorem taxes, Florida's Constitution preempts all taxing authority to the state. Local taxes authorized by the constitution or by the Legislature may only be levied pursuant to the specifications in the governing statute. Unless specifically authorized, relief from these local taxes (credits, refunds, or exemptions) may not be granted.

Of all the local taxes, current law authorizes counties or municipalities to offer relief (specifically, exemptions) for only the following:

- The Economic Development Ad Valorem Tax Exemption for new or expanding businesses that meet certain job-creation and other requirements, pursuant to s. 196.1995, F.S.;
- The Local Business Tax (formerly known as the Occupational License Tax) exemption of 50 percent for "any business, profession or occupation" with a permanent business location in an Enterprise Zone, pursuant to s. 205.054, F.S.; and
- The Public Service Tax (also known as the Municipal Utility Tax) exemption for residential and agricultural uses, public bodies, nonprofit corporations, industrial consumers, and electrical energy used by qualified businesses located in Enterprise Zones, pursuant to ss. 166.231-.234, F.S.

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Fee-Based or Tax-Based Incentives

16. Were any Fee-Based or Tax-Based Incentives provided to one or more businesses during Fiscal Year 2017-18?

Yes

No

[Prev](#)

[Next](#)

Exit this survey



Local Government Economic Development Incentives Survey for FY 2017-18

Fee-Based or Tax-Based Incentives Description

17. Please give the total value for each fee-based or tax-based incentive provided during Fiscal Year 2017-18. If none, please enter 0.

Property Tax Exemptions for Economic Development (Please show the value of the exemption in tax dollars (i.e., taxable value of the exempted property multiplied by the applicable millage rate), rather than the reduction in assessed value.)

Public Service Tax Exemptions

Business Tax Exemptions

Proprietary Fees (Credits, Refunds, Exemptions, Waivers, or Rate Differentials)

Regulatory Fees (Credits, Refunds, Exemptions, or Waivers)

Special Assessments: (Credits, Refunds, Exemptions, or Waivers)

18. Please provide the number of businesses that received the fee-based or tax-based incentives during Fiscal Year 2017-18. If none, please enter 0.

Property Tax Exemptions for Economic Development

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Below-Market Rate Leases or Deeds for Real Property

*** 22. Were any Below-Market Rate Leases or Deeds for Real Property provided to one or more businesses during Fiscal Year 2017-18?**

Yes

No

[Prev](#)

[Next](#)

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Incentives - Geared Towards Certain Industries?

23. Are the incentives granted to businesses geared towards attracting specific industries?

Yes

No

[Prev](#)

[Next](#)

[Exit this survey](#)

Local Government Economic Development Incentives Survey for FY 2017-18

Industry types

**24. What type of industries are your economic development incentives geared towards attracting?
Please check all that apply.**

- Manufacturing
- Corporate Headquarters
- Professional Services
- Research and Development
- Information Technology
- Financial Services
- Multi-state / Multi-national Distribution
- Business Services
- Other

25. If you chose "Other", please describe (for example: sports, agriculture, and tourism).

Sports Performance

[Prev](#)

[Next](#)

[Exit this survey](#)



Local Government Economic Development Incentives Survey for FY 2017-18

Survey Respondent - Contact Information

Thank you for taking the time to report the economic development incentives granted by your county, municipality, or CRA. To finish, please fill out your contact information below. Once you select Done, your survey response will be submitted, and you will be re-directed to EDR's home page. The tabulated results will be made available in a published EDR report at a later date. Thank you!

*** 26. How may we contact you?**

Name:	<input type="text" value="Karen Stewart"/>
Governmental Entity:	<input type="text" value="Manatee County Government"/>
Address:	<input type="text" value="1112 Manatee Ave W"/>
City/Town:	<input type="text" value="Bradenton"/>
State:	<input type="text" value="FL Florida"/>
ZIP:	<input type="text" value="34205"/>
Email Address:	<input type="text" value="karen.stewart@mymanatee.org"/>
Phone Number:	<input type="text" value="9412320631"/>

[Prev](#)