



Workforce Development

ASSET MAPPING FOR HILLSBOROUGH COUNTY

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We also thank CareerSource Tampa Bay for being a supportive, responsive, and considerate client which no doubt led to the successful completion of this project.

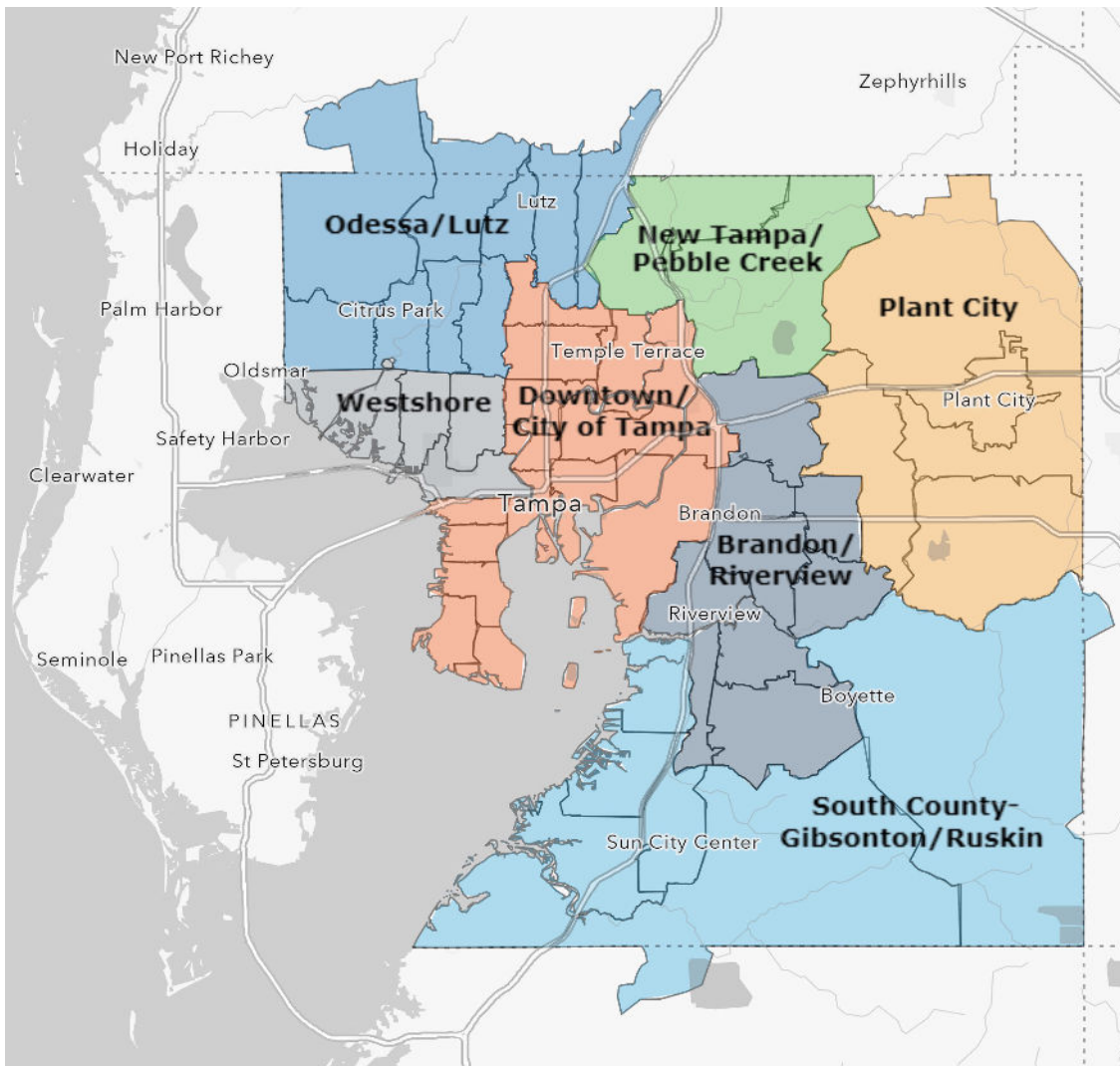


EXECUTIVE SUMMARY

CareerSource Tampa Bay (CSTB) retained Emsi Burning Glass to evaluate the available resources in Hillsborough County in the form of a workforce asset database while considering the relationship and effects these assets may have on the labor market. With the help of CSTB and partners like the Crisis Center of Tampa Bay, Emsi Burning Glass conducted an extensive analysis of the assets in Hillsborough County.

These assets were categorized and subcategorized before being assigned to 7 subregions compiled by ZIP codes for analysis, as the map demonstrates:

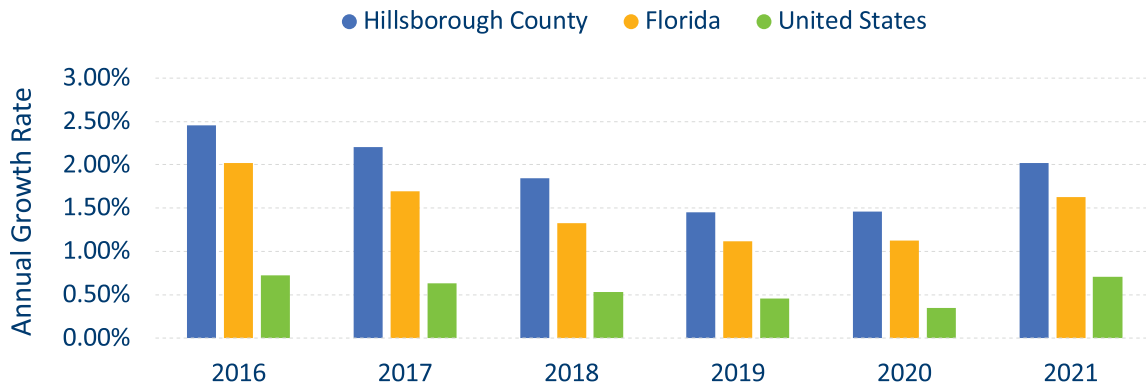
- **Brandon/Riverview:** ZIP codes 33510, 33511, 33569, 33578, 33579, 33584, 33594, 33596
- **Downtown/City of Tampa:** ZIP codes 33602, 33603, 33604, 33605, 33606, 33609, 33610, 33611, 33612, 33613, 33616, 33617, 33619, 33620, 33621, 33629, 33637
- **New Tampa/Pebble Creek:** ZIP codes 33592, 33647
- **Odessa/Lutz:** ZIP codes 33548, 33549, 33556, 33558, 33559, 33618, 33624, 33625, 33626
- **Plant City:** ZIP codes 33527, 33563, 33565, 33566, 33567
- **South County – Gibsonton/Ruskin:** ZIP codes 33534, 33547, 33570, 33572, 33573, 33598
- **Westshore/Citrus Park/Town & Country:** ZIP codes 33607, 33614, 33615, 33634, 33635



Key Findings

Hillsborough County is experiencing rapid demographic growth compared to the rest of Florida and the United States, having added over 100,000 people between 2015 and 2020. It also has a high immigrant population – Hillsborough County’s foreign-born population is 17.6% compared to just 13.6% nationally. Such rapid growth has the potential to put extra pressure on workforce development assets in the county. As explained by the World Bank, “the speed and scale of urbanization brings challenges, including meeting accelerated demand for affordable housing, well-connected transport systems, and other infrastructure, basic services, as well as jobs.”¹ As such, the entire workforce system will have to be flexible and responsive to this growth due to real-time, shifting demand.

1 World Bank, <https://www.worldbank.org/en/topic/urbandevelopment/overview#1>



The demographic growth is felt at different levels across the county. For instance, the South County-Gibson/Ruskin and New Tampa/Pebble Creek subregions are growing 22.8% and 17.0% respectively, while Plant City has only grown 1.6% over the same period. This means the demand for assets is in flux. Furthermore, workforce assets will not only need to keep pace with the volume of growth, but the *type of needs* based on the unique demographics in each subregion.

For instance, unemployment is felt differently among race and gender. Though the White population accounts for 73.6% of the total county population, it only accounts for 63.5% of unemployed. Meanwhile the Black population accounts for 31.9% of unemployed persons in the county despite only being 18.3% of the population. Similarly, women experience higher unemployment than men in the county, accounting for 56.2% of unemployed persons despite making up 51.0% of the population.

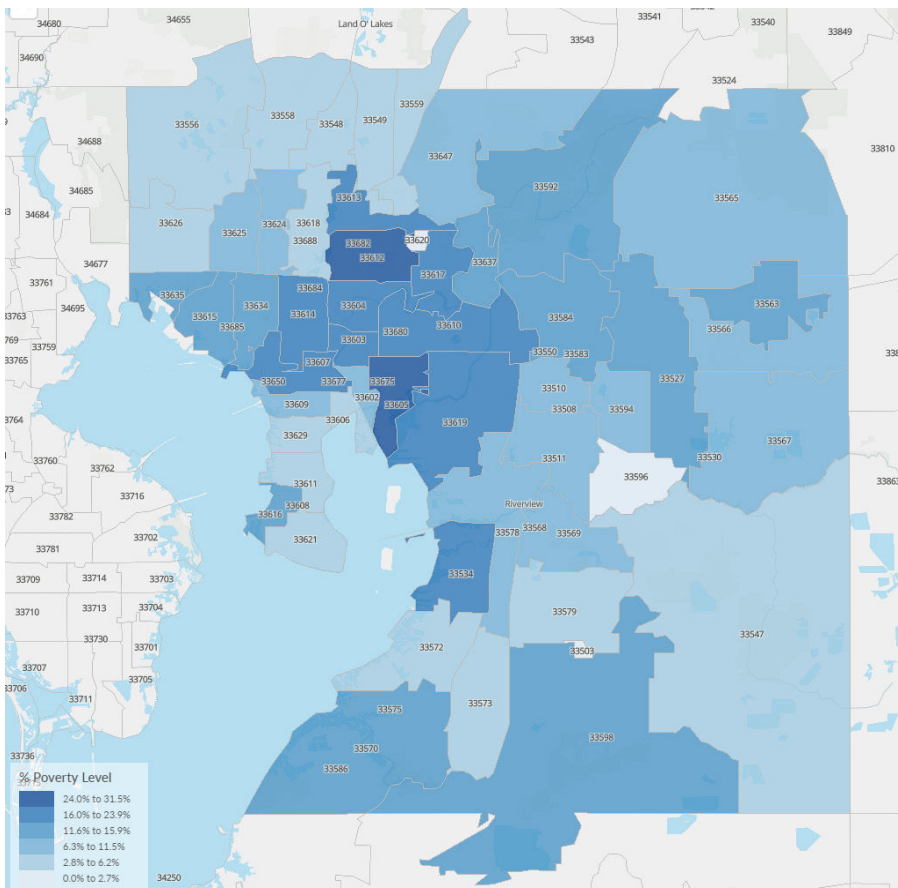
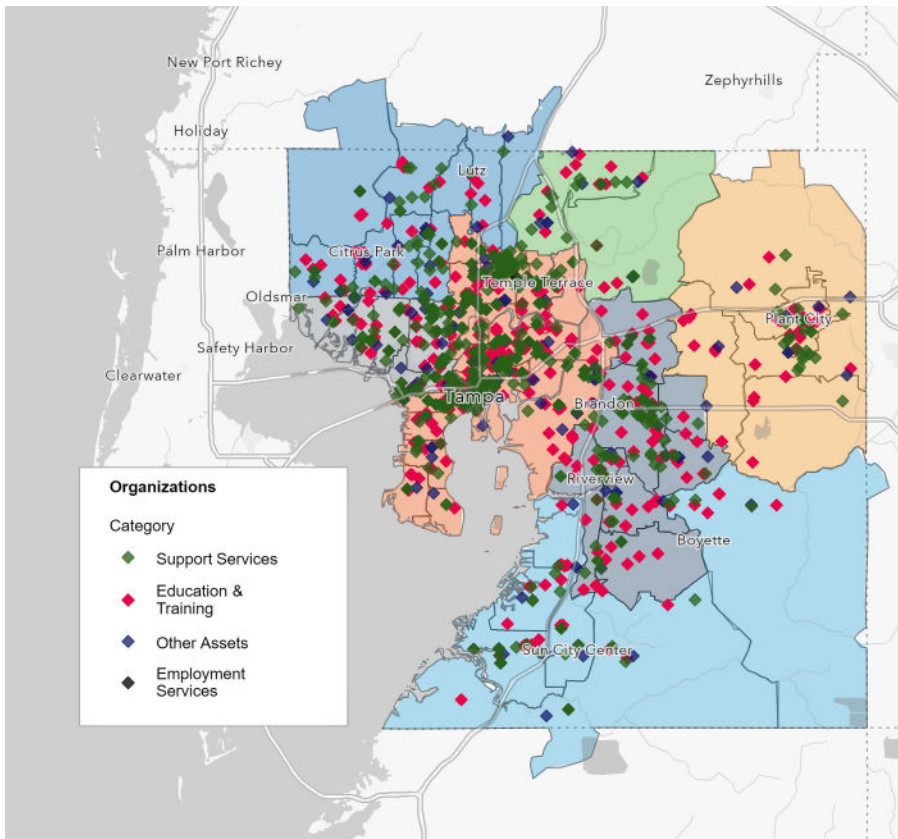
Needs may also change based on age and immigration status. Which subregions are growing rapidly due to immigration? Which are growing due to relocation of retirees from other areas of the country? This will change the service demand for things like language support and senior services.

The most poverty-stricken areas² of Hillsborough County are within the Downtown/City of Tampa subregion. These include West River, Ybor City, and North Tampa near USF and major hospitals such as USF Health, the VA hospital, and Advent Health. However, when considering resource alignment, this subregion also has the largest share of assets. Of the over 900 asset locations, Downtown/City of Tampa is home to almost 47% of them.

Clusters exist in the Downtown and University areas of Tampa, the center of Brandon, and the center of Plant City. For the most part, these clusters are in proximity to the poorest areas, yet a clear gap exists in Gibsonton's ZIP code of 33534, where there is heightened poverty but few assets. The presence of assets is less dense at the east end of the City of Tampa, in the area buttressed



² Areas with the highest percentages of population living beneath the poverty threshold per calculations by the American Community Survey (ACS).



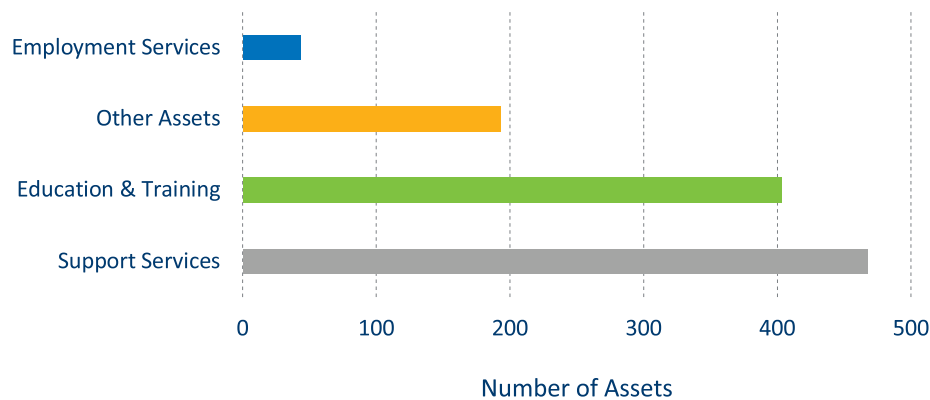
by I-75 and the Tampa Bypass Canal. Palm River-Clair Mel seems to have few assets within the community, even along S Tamiami Trail (Hwy 41) and Causeway Blvd. The area of Westshore/Citrus Park/Town & Country lacking a high density of assets is due to the large acreage of Tampa International Airport.

In all, over 920 assets were identified across the county's subregions. The number of assets tended to correspond to population size, though some subregions have more assets per capita than others. For instance, Downtown/City of Tampa has both the most assets and highest assets per capita (0.91), while New Tampa/Pebble Creek has both the fewest assets and fewest per capita (0.40).

Employment Services has the fewest assets among the four main categories, while Support Services represents the largest asset category. Education & Training assets represent the second-largest group, though most of these are related to the K-12 public school system.



Subregion	Total Assets	Assets per 1,000 People	Population
Downtown/City of Tampa	431	0.91	475,723
Brandon/Riverview	132	0.44	297,917
Westshore/Citrus Park/Town & Country	116	0.70	164,744
Odessa/Lutz	89	0.46	193,114
South County - Gibsonton/Ruskin	67	0.47	143,649
Plant City	58	0.61	95,281
New Tampa/Pebble Creek	34	0.40	84,399
Total	927		1,454,828



Recommendations

Based on our demographic analysis of Hillsborough County and our assessment of workforce assets identified in each subregion, Emsi Burning Glass has noted potential misalignments that, if investigated further and addressed, could help better serve the county's population. We recommend the following:

- Educate and Train Employers about Hidden Workers
- Monitor High-Growth Areas for Changes in Asset Demand
- Align Language Support Assets with High Migrant/Immigrant Populations
- Address Disability Service Gaps
- Extend Employment Services to Cover the Entire County and Opportunity Zones
- Bring Special Focus to North Tampa
- Utilize Senior Centers for Assisting Elderly Workforce Entry



Educate and Train Employers about Hidden Workers

The country has more jobs than there are people. Simply put, if companies want to achieve growth, they cannot afford to leave a sizeable pool of human capital on the sidelines. Given the challenging labor market, CSTB has one of the most critical roles in supporting the area economy: activating “hidden workers.”³ “Hidden workers” are those that are unemployed, absent from the workforce entirely, or seeking full-time employment while only managing to achieve part-time employment. They sit on the sidelines due to the convergence of personal circumstances, external misconceptions, and inflexible HR practices which constrain the pool of talent. This being considered, Hillsborough County has key hidden worker populations that can contribute to the workforce:

- Persons with Disabilities – Although lower than state and national averages, these persons account for 11.6% of population.
- Seniors (65+) – 11.1% of seniors are living in poverty compared to a national average of 9.3%. Seniors experiencing poverty may be both willing and able to fill in labor force gaps, especially for low-skilled and part-time roles.
- Veterans – 8.4% of the county’s population has veteran status, compared to 7.3% nationally.
- Immigrants – Foreign-born residents account for 17.6% of the Hillsborough County population compared to just 13.6% nationally. Furthermore, immigrants typically work jobs which are in high demand but for which there is an inadequate supply of native talent.

CSTB should leverage its position as a business service provider to become labor force advocates: Stress the importance of tapping into the Hidden Workforce as an act of *pragmatic necessity* which empowers all workers by connecting talent to opportunity. Help businesses address labor force challenges by helping them reframe their approach to hiring from degrees and experience towards skills, potential, and motivation.

One pragmatic example: help employers create specialized applicant pipelines for hidden workers, separate from rigid Applicant Tracking Systems (ATS). ATS is efficient but can often exclude viable candidates by placing multiple Go/No-Go barriers in place even when not critical to the job description.

*CSTB should leverage its position as a business service provider to become labor force advocates: Stress to employers the importance of tapping into the Hidden Workforce as an act of **pragmatic necessity**.*

3 Harvard Business School and Accenture, “Hidden Workers: Untapped Talent,” <https://www.hbs.edu/managing-the-future-of-work/Documents/research/hiddenworkers09032021.pdf>



Monitor High-Growth Areas for Changes in Asset Demand

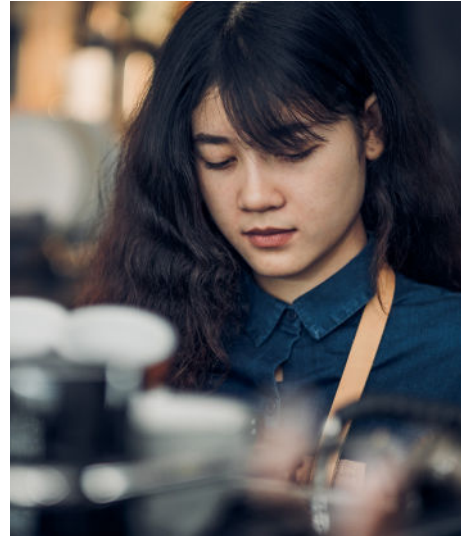
High-growth areas need to anticipate changing workforce demand. The pace of demographic growth is certainly a tailwind for the area economy and testament to the attractiveness of the region, but such growth is also bound to tax the system's resources. With more people, there is also a greater demand for services and resources. CSTB and regional partners should consider *who* these newcomers are and what their service needs will be to anticipate what areas will experience increases in service demand. For instance, South County – Gibsonton/Ruskin is experiencing swift growth. Pay special attention to this area. Consider partnering with organizations to fund and execute an annual new resident survey to supplement the Census Bureau's American Housing Survey (AHS).



Align Language Support Assets with High Migrant/Immigrant Populations

Hillsborough County's high migrant and immigrant populations mean there are many English language learners, as well as people without GEDs or high school diplomas. There seem to be too few assets for migrant workers and non-English language speakers given the large immigrant population of the county. Focus on delivering language support services closer to where they are. For instance:

- Concentrate on providing language support services to the Westshore/ Citrus Park/ Town & Country subregion, especially ZIP 33634 (the area between Town & Country and Pinecrest West Park). This area has the highest number and percentage of foreign-born residents in the subregion, which likely means the most non-English speakers. Consider engaging the public library system to help deliver language support programs where adult school ESOL programs are unavailable or fall short.
- Explore the socio-economic status of the immigrant population in New Tampa/Pebble Creek. This subregion has an elevated foreign-born population, but it lacks an adult school which are typically vehicles for ESOL programs. Are they educated beyond a high school level with English-language proficiency, or is this subregion underserved?
- Increase language support for the ZIP 33625 (Carrollwood) area in Odessa/Lutz. The subregion is third in immigrant population share but has no assets to serve them. Like New Tampa/Pebble Creek, it lacks an adult school which may be due to lack of demand due to its high education attainment rate.
- The Plant City subregion has a large migrant population due to the need for field workers to support this heavily agricultural area. Ensure proper language support, education, and immigration services for this community. Connect migrant workers with local skills-similar jobs with anchor employers such as in distribution to ensure continuity of employment.
 - Star Distribution Systems – distribution center/warehouse environment
 - Gordon Food Service – distribution center/warehouse environment
 - C&S/Winn-Dixie – distribution center/warehouse environment





Address Disability Service Gaps

Disability assistance is too concentrated and completely absent from 2 of 7 subregions in Hillsborough County. Disability services seem somewhat misaligned within Downtown/City of Tampa: ZIPs 33612 (North Tampa) and 33605 (Ybor City) do not have the highest concentration of assets despite having the highest concentration of persons with disabilities in the subregion. Sun City Center and Wimauma in the South County – Gibsonton/Ruskin subregion have the highest percentage of persons with disabilities among any ZIP code, yet the only asset in the subregion offering disability assistance is the CSTB Ruskin location. Explore ways to expand disability assistance for the residents of Sun City Center and Wimauma.

Connect with the Agency for Persons with Disabilities (APD). One of its three main goals is to “increase the number of individuals with developmental disabilities in the workforce.” The Florida legislature appropriated \$1 million for FY 2021/2022 to provide support employment services for individuals on the APD waiting list who would like to work. Proactively work with APD to bring training and employers to this waiting list. Consider using CSTB locations to reach people closer to high disability populations, thereby extending APD’s geographic reach.⁴



Extend Employment Services to Cover the Entire County and Opportunity Zones

Two subregions have no assets for Employment Services, reflecting a gap in services by area. Employment Services are almost entirely focused within the Downtown/City of Tampa subregion. It has over 80% of the Employment Services assets in the County, despite accounting for just 33% of the population. This is where Hillsborough County experiences the highest percentage of the population living in poverty and therefore requires more resources to help.

The Gibsonton area (ZIP 33534) experiences the highest poverty rate of its subregion (and has one of the higher poverty rates in the county), but it does not have Employment Services or non-K12 Education & Training.

Only 33% of assets offering Employment Services lie within Opportunity Zones even though they tend to be concentrated in the Downtown/City of Tampa subregion. Among these assets within Opportunity Zones, many focus on entrepreneurial or small business development rather than services for typical job seekers. CSTB should seek to realign more Employment Services within Opportunity Zones.



⁴ Agency for Persons with Disabilities, <https://apd.myflorida.com/customers/supported-employment/>



Bring Special Focus to North Tampa

The North Tampa area in ZIP 33612 (the area wedged between Lake Carroll in the West and the University of South Florida in the East) has the highest intensity of poverty, persons with disabilities, and people using public transportation for work. It also has many veterans overall (but not as percentage of its population).

Personal care and service occupations are concentrated here, but these occupations were negatively affected by the pandemic – leaving many already low-income individuals dealing with the fallout. Focus on healthcare career pathways for North Tampa residents experiencing poverty – the proximity to major healthcare providers could marry job opportunity with proximity, thus shorter public transportation commute times.

Though childcare seems well distributed across subregions, North Tampa may need more to enable area workers more flexibility at work.

Given the socio-economic position of many residents here, the neighborhoods experiencing poverty in this ZIP code need to be considered a priority area for workforce development.



Utilize Senior Centers for Assisting Elderly Workforce Entry

Senior center programming is available for those aged 50+, a full 17 years before retirement age. This means senior centers are a possible location for identifying:

- Early retirees who may be willing to re-enter the workforce
- Non-retired seniors who experience unemployment or underemployment

These senior centers have computer labs and internet access as well as classroom/event space, so the infrastructure is in place for basic skills training for workforce entry. Partner with senior centers to bring senior workforce re-entry training to senior populations. Identify employers that would be willing to create specialized senior training and recruitment programs to bolster their workforce.

Target senior centers closest to areas with high senior poverty rates first – these seniors may be more willing to enter the workforce out of economic necessity. Partner with the library system or the adult school system to extend reach where senior centers fall short. Silver Tree Senior Dining & Activity Center, Mary Walker Senior Dining & Activity Center, and King’s Manor Senior Dining & Activity Center are all located within Opportunity Zones.

Note that there are no senior centers in the Plant City or New Tampa/Pebble Creek subregions. Raise this with Hillsborough County to explore if there would be enough demand for service expansion to these subregions.



BACKGROUND & PURPOSE

CareerSource Tampa Bay (CSTB) serves as the local workforce development board for Hillsborough County, one of four counties comprising the Tampa-St. Petersburg-Clearwater metropolitan statistical area (Tampa MSA). CSTB's mission is to expand career opportunities for individuals and enable the success of all workers through comprehensive workforce solutions that meet the needs of the community.

Communities can benefit from understanding the extent of resources available to assist the workforce. In addition, understanding if there are gaps in resources, whether it is the existence of a program or geographic lapses in services, is another key component of understanding the available assets in a community. CSTB retained Emsi Burning Glass to not only evaluate the available resources in Tampa Bay in the form of an asset database, but also consider the relationship and effects these assets may have on the labor market.



METHODOLOGY

The methodology for this asset mapping exercise is largely based on the Workforce Asset Mapping Report done for Workforce Solutions Borderplex by Public Consulting Group | Human Services in 2017. In it, the report considers the “broader workforce development system,” which applies to any asset that assists in the development of human capital and supports people in reaching their full potential. As such, assets are divided into four broad categories, with multiple subcategories of services falling within each:

Categories	Subcategories
Employment Services	<ul style="list-style-type: none"> • Assistance Accessing Public Services • Individual Career Assessments • Case Management Services • Foundational Skill Building • Job Readiness Training • Job Search & Placement Services • Entrepreneurial or Small Business Development
Education & Training	<ul style="list-style-type: none"> • Basic Skills Training • Asset Building & Financial Literacy • Vocational Education & Training • GED Assistance • K-12 • University
Support Services	<ul style="list-style-type: none"> • Books • Cash Assistance/Income Maintenance • Childcare • Food/Goods • Healthcare • Housing or Shelter • Legal Resources • Language Support • Mental Health & Substance Abuse • Veteran & Military Services • Others (Parenting Assistance, Utility Assistance, Senior Services, Tax Assistance, etc.)
Other Assets	<ul style="list-style-type: none"> • Community Centers & Facilities • Emergency Services • Chambers of Commerce • Others (Economic Development, Mentoring & Development, Advocacy Groups, etc.)

Source: PCG, with minor modifications by Emsi Burning Glass

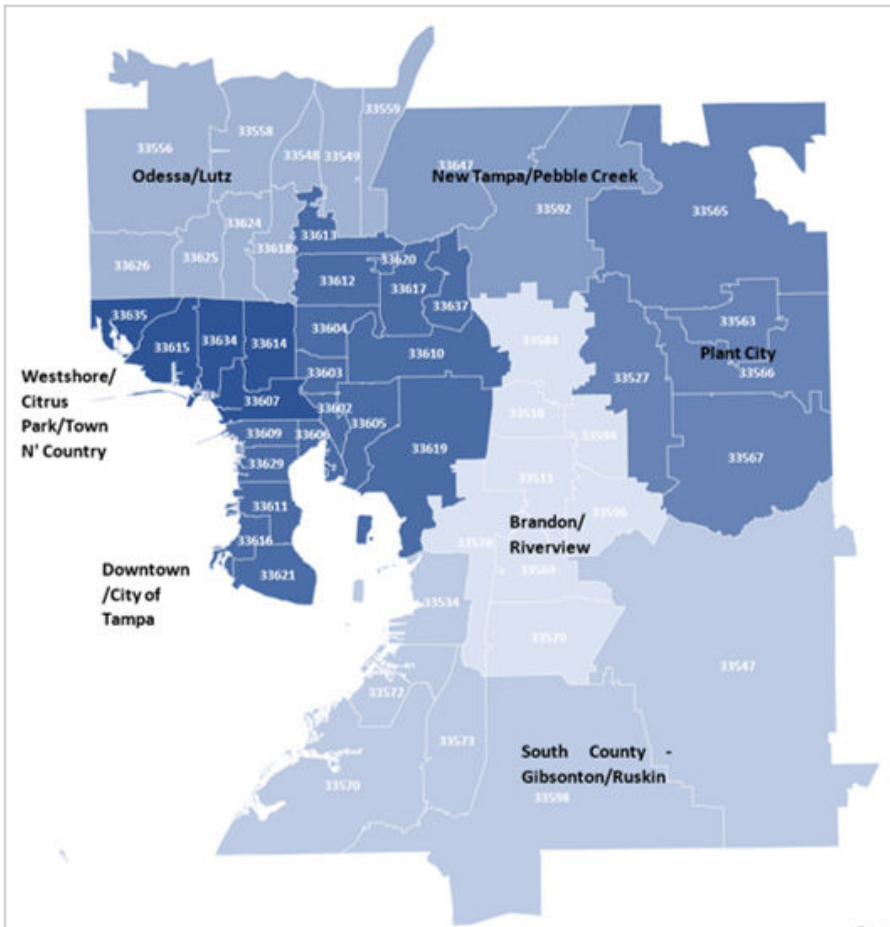


The Crisis Center of Tampa Bay, which manages United Way Suncoast's 211 database for Hillsborough County, shared its list of assets to serve as the backbone of asset data. Further desk research was done to fill out missing information and categorize the assets. The partners of these organizations were researched via organization websites and a survey was sent to the organizations to confirm their information and ask for information regarding their partners.

Survey response was too low to have broadly impacted the collection of additional asset data. It should be noted here that the database is not 100% representative of all workforce assets as a result, but it is intended to be a comprehensive resource that serves as an excellent source of intelligence on assets available to the public.

As assets were identified, their locations were noted using latitude and longitude coordinates to aid GIS mapping efforts. To make the analysis of Hillsborough County more manageable (as well as to provide deeper insight into different areas), Emsi Burning Glass worked with CSTB to define seven subregions based on collections of ZIP codes. ZIP codes were chosen as the base unit of geographic analysis because they allow a localized level of study without sacrificing much access to demographic and labor market data. The subregions and their ZIP codes are below:

Figure 1: MAP OF SUBREGIONS AND ZIP CODES



- **Brandon/Riverview:** ZIP codes 33510, 33511, 33569, 33578, 33579, 33584, 33594, 33596
- **Downtown/City of Tampa:** ZIP codes 33602, 33603, 33604, 33605, 33606, 33609, 33610, 33611, 33612, 33613, 33616, 33617, 33619, 33620, 33621, 33629, 33637
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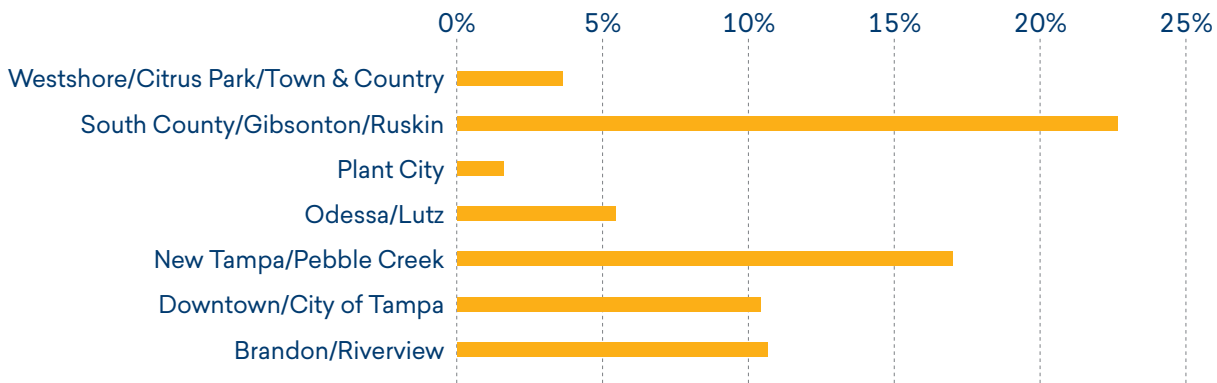
Beyond the collection of asset data, Emsi Burning Glass utilized its proprietary Developer tool to pull labor market and demographic data to deepen the analysis of Hillsborough County and its subregions.

GEOGRAPHIC OUTLOOK & REGIONAL DEMOGRAPHICS

Hillsborough County has enjoyed strong and steady population growth over several years. By 2020, the population reached almost 1.5 million. It is projected to grow above 1.6 million by 2025 – that is approximately 20,000 people per year.

The demographic growth is felt at different levels across the county. For instance, the South County-Gibson/Ruskin and New Tampa/Pebble Creek subregions are growing 22.8% and 17.0% respectively, while Plant City has only grown 1.6% over the same period. Much of the county’s population growth has been due to net positive migration from elsewhere in the United States. The most intense sources of net migration are in South Florida. Los Angeles, Chicago, and the coastal Northeast from Washington, DC to Boston are also major sources of migration.

Figure 2: **POPULATION GROWTH PERCENTAGE BY SUBREGION, 2015-2020**

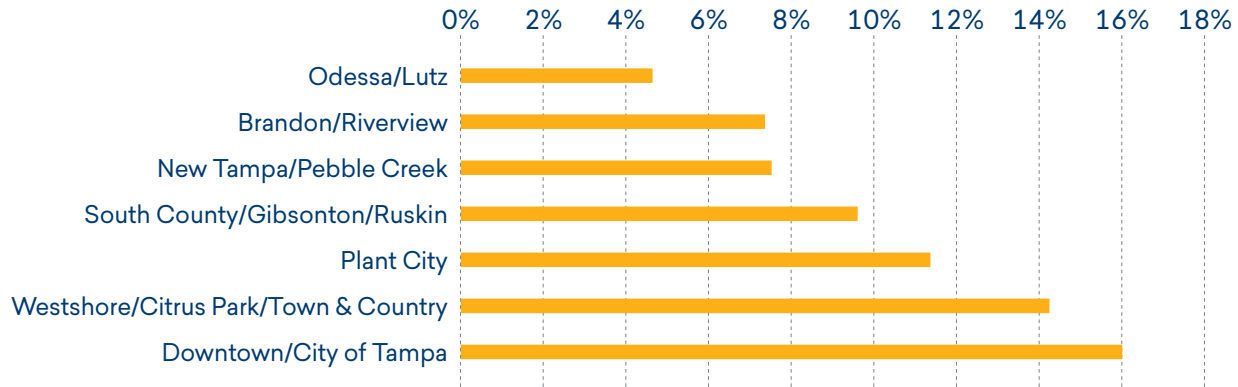


Source: Emsi Burning Glass

Workforce assets will not only need to keep pace with the volume of growth, but the type of needs based on the unique demographics in each subregion. For instance, the poverty rate varies among subregions, with Downtown/City of Tampa having the highest poverty rate of 16.0%. This is followed by Westshore/Citrus Park/Town & Country (14.3%) and Plant City (11.3%).

The many areas of Hillsborough County with significant rates of persons living below the poverty level are within the Downtown/City of Tampa subregion. These include West River, Ybor City, and North Tampa near USF and major hospitals such as USF Health, the VA hospital, and Advent Health. However, when considering resource alignment, this subregion also has the largest share of assets. Of the over 900 asset locations, Downtown/City of Tampa is home to almost 47% of them.

Figure 3: **POVERTY LEVEL BY SUBREGION, 2019**



Source: Emsi Burning Glass

Other subregions demonstrate their own demographic characteristics which make them unique. Downtown/City of Tampa is the most diverse of the subregions, with the highest density of minorities. Westshore/Citrus Park/Town & Country leads with the highest percentage of its population being foreign-born while also having the highest percentage of people with disabilities. South County – Gibson/Ruskin’s workforce is older by comparison with the highest percentage of Baby Boomers. It also has the highest veteran population. Plant City has the highest percentage of people who have not completed high school or earned a GED, while Odessa/Lutz and New Tampa/Pebble Creek have the highest education attainment rates by comparison.

Table 1: **SUBREGION CHARACTERISTICS**

Subregion	Baby Boomer Share of Population ⁵	Minority Share of Population	Foreign-Born Share of Population	Veteran Share of Population	Share of Population with Disability	Share of Population with Less than High School Diploma/ GED
Downtown/City of Tampa	19.1%	59.8%	15.5%	7.0%	12.6%	13.7%
Westshore/Citrus Park/Town & Country	20.2%	50.8%	33.9%	5.8%	13.0%	14.8%
Plant City	22.8%	42.5%	14.0%	8.8%	12.3%	20.8%
South County/Gibson/Ruskin	24.1%	40.8%	12.9%	12.1%	12.3%	12.3%
New Tampa/Pebble Creek	19.3%	50.8%	22.6%	6.6%	8.6%	6.3%
Brandon/Riverview	21.5%	49.3%	14.3%	11.1%	11.0%	8.2%
Odessa/Lutz	23.7%	40.8%	16.1%	8.0%	9.6%	4.9%

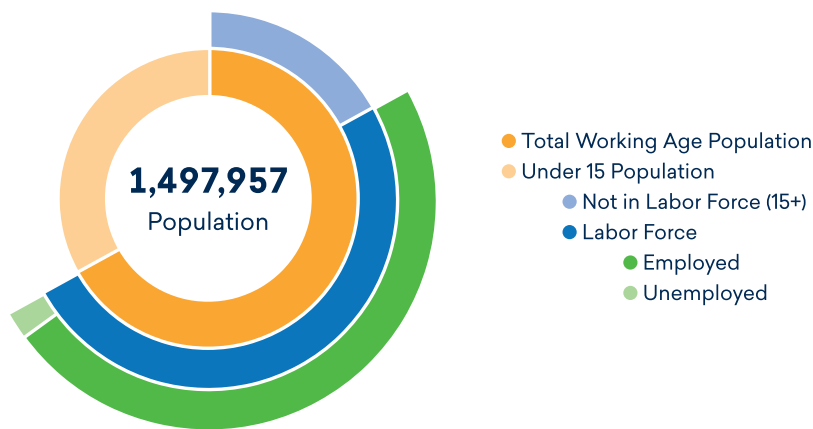
Source: Emsi Burning Glass

5 **Baby Boomer** – ages 57-75

LABOR MARKET OVERVIEW

Although the population of Hillsborough County is 1.5 million, roughly 750,000 people are in the labor force. The labor force is the combined total of employed and unemployed people. It does not include all employable people, as the labor force number excludes people within the employable population who are neither employed nor unemployed and are not seeking work for whatever reason.

Figure 4: **LABOR FORCE BREAKDOWN 2020**



Source: Emsi Burning Glass Q3.2021 Dataset

The Labor Force Participation Rate (LFPR) for Hillsborough County fell from 64.43% in 2019 to 63.19% in 2020 due to pandemic disruptions. However, Hillsborough County has outperformed the national trends of low participation rates and reached a LFPR of 65.47% as of July 2021. Although LFPR rates by age group data have a 2-year delay from the ACS, Hillsborough County demonstrated gains in the 16-19 years of age cohort. This age group is important as it typically reflects young people not seeking a bachelor's degree, which is a critical skills group. The age cohort's participation rate improved 31.6% in 2014 to 32.9% in 2019.

Of the entire labor force, over 25,000 people were considered unemployed in the county. While unemployment peaked in 2020, reaching 7.17%, it has since fallen to 3.3% as of January 2022, matching pre-pandemic levels. The unemployment rate in Hillsborough County has consistently remained below that of Florida and the United States. However, unemployment is felt differently among race and gender. For instance, though the White population accounts for 73.55% of the

total county population, it only accounts for 63.52% of unemployed. Meanwhile the Black population accounts for 31.91% of unemployed persons in the county despite only being 18.26% of the population. Similarly, women experience higher unemployment than men in the county, accounting for 56.2% of unemployed persons despite making up 51.0% of the population.

Many occupation groups demonstrated net growth in Hillsborough County between 2015 and 2020. However, this growth has not been felt evenly across demographic groups. As with any region, certain demographic groups tend to be overrepresented in certain occupations. This can be driven by cultural preferences, individual choice, or more systemic issues such as access to quality and affordable education opportunities. Hillsborough County is no different.

For instance, many of the occupations that enjoyed robust growth between 2015 and 2020 are in higher wage categories. These are occupation groups such as Management; Business & Finance; Computer & Mathematics; Architecture & Engineering; and Life, Physical, & Social Sciences. However, these occupations also tend to be overrepresented by White and Asian workers.

On the other end, some occupation groups have experienced job decline, some even prior to the pandemic. Food Preparation & Serving Related Occupations; Building & Grounds Cleaning & Maintenance Occupations; Personal Care & Service Occupations; Sales & Related Occupations; Office & Administrative Support Occupations; and Farming, Fishing, & Forestry Occupations all experienced net job losses between 2015 and 2020. These occupations also tend to be among the low-paying categories and are frequently overrepresented by Black and Latino workers.

Some of these occupations tend to coalesce around areas within Hillsborough County. Food Preparation & Serving Related Occupations; Personal Care & Service Occupations; and Farming, Fishing, & Forestry Occupations experienced the sharpest job decline, much due to the pandemic. These are also among the lowest-paying occupation groups:

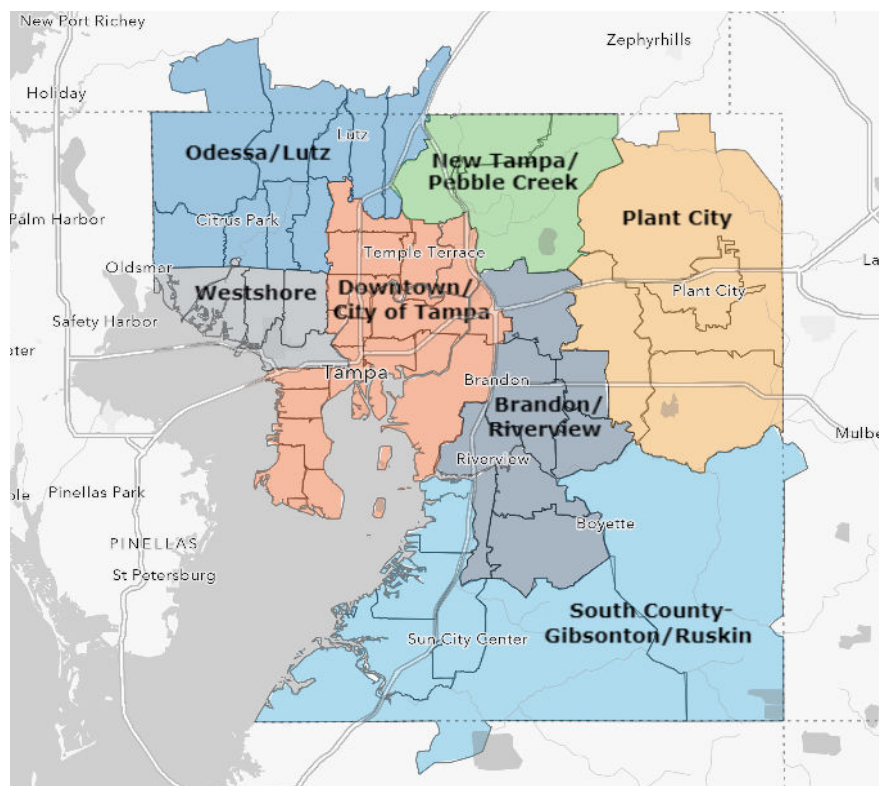
- Food Preparation & Serving Related jobs are concentrated in ZIP 33607 (Westshore/Citrus Park/Town & Country) and ZIP 33511 (Brandon/Riverview).
- Personal Care & Service jobs are concentrated in ZIP 33612 and ZIP 33602 (both Downtown/City of Tampa).
- Farming, Fishing, & Forestry jobs are concentrated in ZIP 33569 (Brandon/Riverview) followed by ZIP 33610 (Downtown/City of Tampa).

ASSET MAPPING

Overview

In this section, Emsi Burning Glass analyzes Hillsborough County's workforce assets on an aggregate basis before providing a more detailed summary of each subregion's asset inventory. The analysis of subregions will be put in the context of labor market information to uncover possible misalignments of asset availability.

Figure 5: **MAP OF HILLSBOROUGH COUNTY SUBREGION DIVISIONS**



Source: Emsi Burning Glass

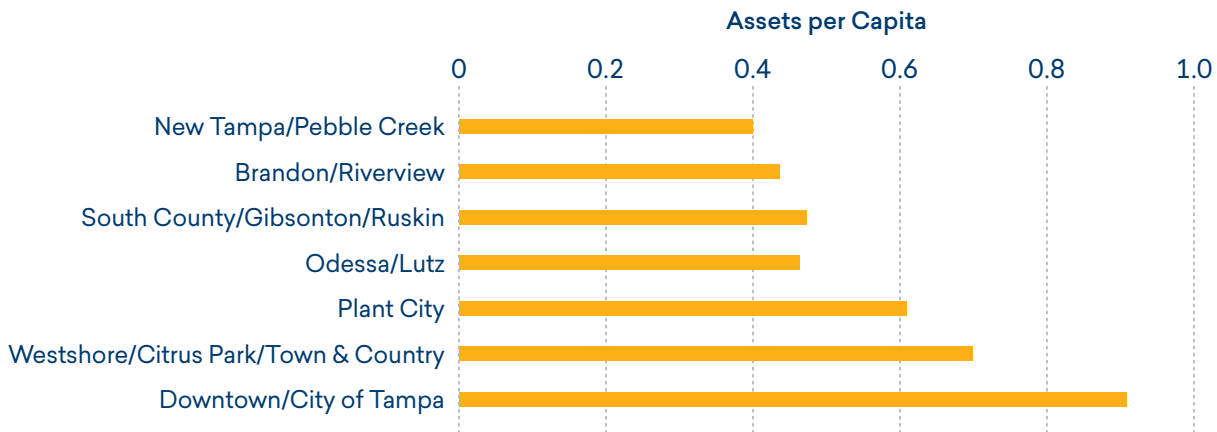
The study identified 927 unique assets that could be mapped. The database also includes some assets which could not be mapped by address or coordinates due to PO Box addresses. Downtown/City of Tampa has the most assets (431) and highest asset density. Despite only accounting for 32.7% of the county's population, it houses 46.5% of workforce assets. New Tampa/Pebble Creek has the lowest density of assets along with the fewest number of assets.

Table 2: **TOTAL UNIQUE ASSET LOCATIONS BY SUBREGION**

Subregion	Total Assets	Population
Downtown/City of Tampa	431	475,723
Brandon/Riverview	132	297,917
Westshore/Citrus Park/Town & Country	116	164,744
Odessa/Lutz	89	193,114
South County - Gibsonton/Ruskin	67	143,649
Plant City	58	95,281
New Tampa/Pebble Creek	34	84,399
Total	927	1,454,828

Source: Emsi Burning Glass

Figure 6: **ASSETS PER 1,000 PEOPLE BY SUBREGION**

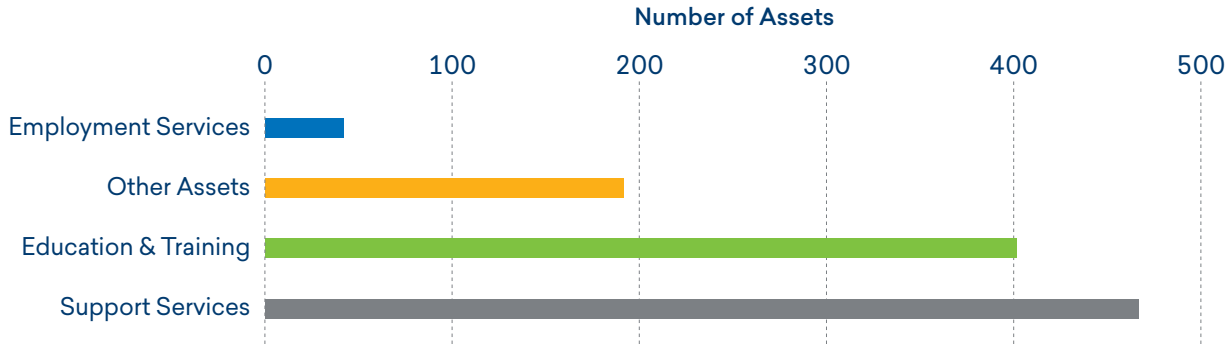


Source: Emsi Burning Glass

When examining the number of assets by category and subcategory, it is important to remember that the number may exceed the total 927 unique assets. This is because some assets can fall into several categories by providing multiple services. The largest category is Support Services, which includes childcare and healthcare. Education and Training is also a large category because this includes Hillsborough County public schools (K-12 education mostly) which is one of the ten largest school districts in the country.⁶ Employment Services is the smallest asset category, with just 43 locations.

⁶ National Center for Education Statistics, <https://nces.ed.gov/programs/di>

Figure 7: TOTAL ASSETS BY CATEGORY, HILLSBOROUGH COUNTY



Source: Emsi Burning Glass

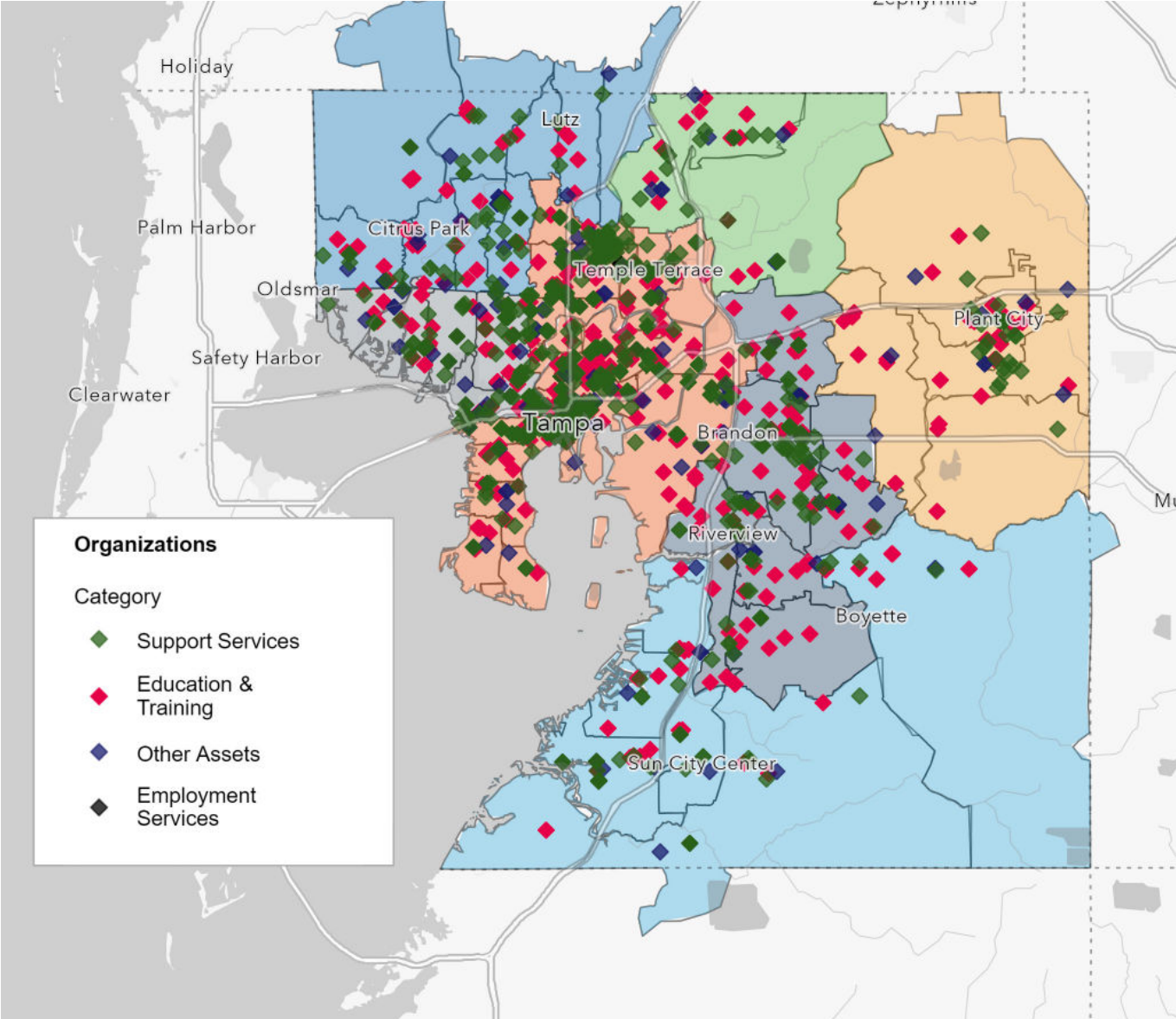
When broken down by asset category and subregion, Downtown/City of Tampa leads among all four categories. While Support Services is the largest category for Downtown/City of Tampa, followed by Education & Training, the number of Education & Training assets in other regions tend to rival (or exceed) the number of Support Services assets. For example, this is the case for Brandon/Riverview, South County – Gibsonton/Ruskin, and Odessa/Lutz.



7 National Center for Education Statistics, https://nces.ed.gov/programs/digest/d18/tables/dt18_215.30.asp?current=yes

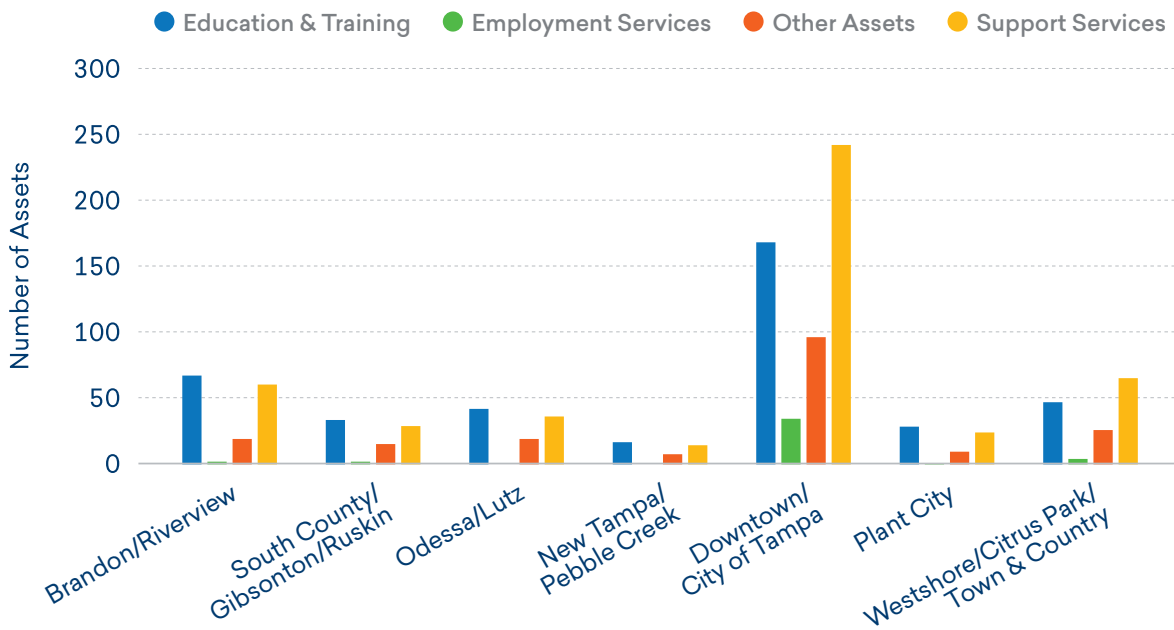
Odessa/Lutz and New Tampa/Pebble Creek have zero assets for employment services, reflecting a gap in services by area. They are almost entirely focused within Downtown/City of Tampa. On a per capita basis, Downtown/City of Tampa leads in Education & Training assets, but Plant City and Westshore/Citrus Park/Town & Country are comparable (0.35 compared to 0.30 and 0.29 respectively). Downtown/City of Tampa also leads in Other Assets per capita and Support Services per capita. Westshore/Citrus Park/Town & Country is second in Employment Services, Support Services, and Other Assets per capita.

Figure 8: MAP OF HILLSBOROUGH COUNTY ASSETS BY CATEGORY



Source: Emsi Burning Glass

Figure 9: TOTAL ASSETS BY CATEGORY & SUBREGION, HILLSBOROUGH COUNTY



Source: Emsi Burning Glass

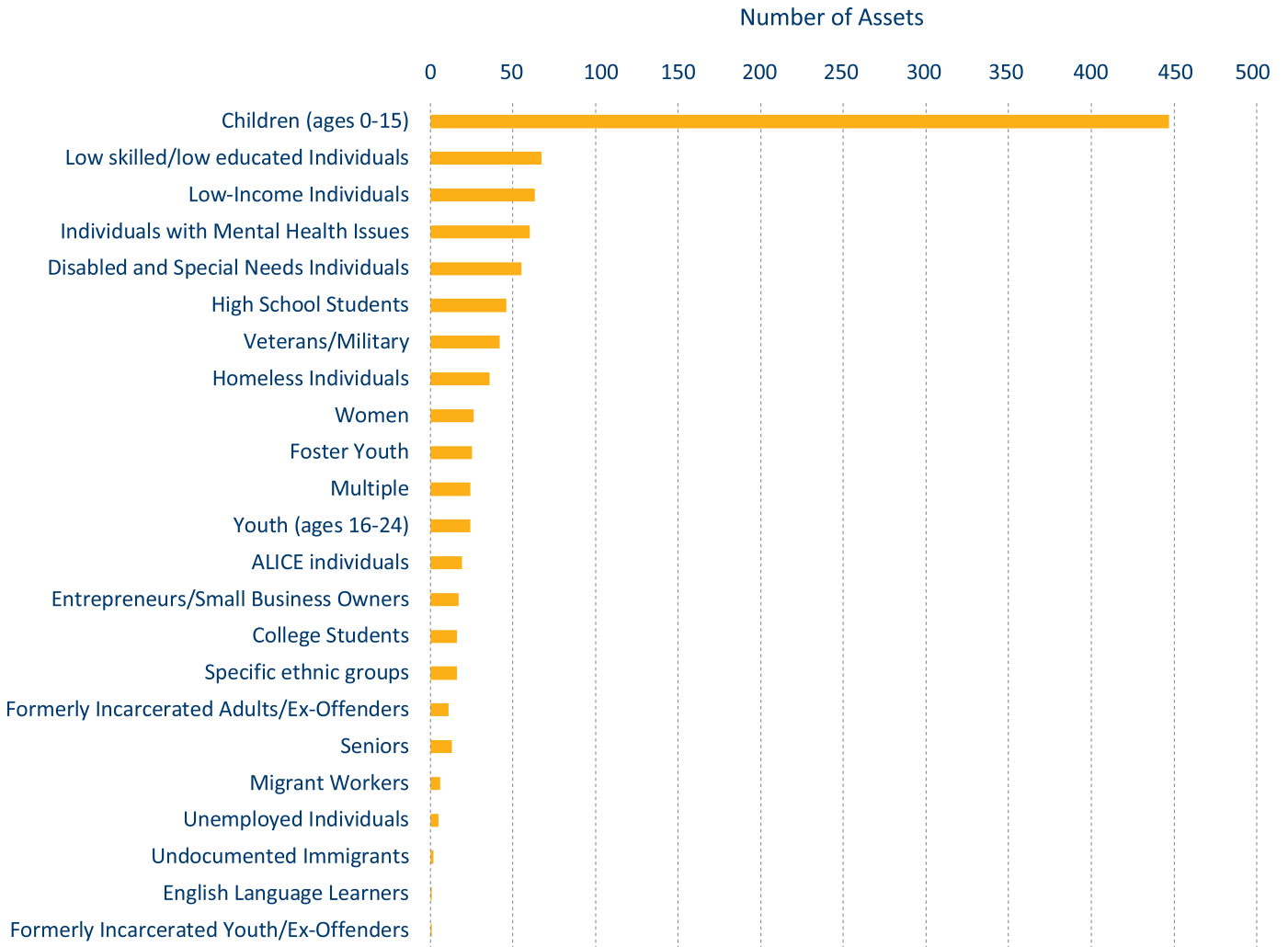
When examining assets by target population, Children (ages 0-15) are the largest asset category. Most of these 400+ assets are Hillsborough County public schools and childcare facilities, demonstrating the region’s investment in its future generations. Low-skilled/Low-educated Individuals and Low-Income Individuals are the next largest target population categories, followed by Individuals with Mental Health Issues.

On the other end, there are few assets whose target population is English Language Learners, Migrant Workers, and Unemployed Individuals.⁷ However, when examining assets by subcategory, one of which includes Language Support, 13 assets were identified – 6 of which are in Downtown/City of Tampa.

There were 344 assets that were not assigned to a target population because they offered services to the general population or did not stipulate any sort of restrictions or focus area. Such assets could be emergency services, government institutions, etc.

⁷ Each asset was assigned one target population, rather than multiple. Although five were identified as exclusively targeting unemployed individuals, many provide employment services to the unemployed. Be careful not to conflate Employment Services as a category with Unemployed Persons as a target population.

Figure 10: NUMBER OF ASSETS BY TARGET POPULATION, HILLSBOROUGH COUNTY



Source: Emsi Burning Glass

Emsi Burning Glass examined the mix of Employment Services through the lens of the Employment Service Continuum outlined in the Workforce Solutions Borderplex report cited by CareerSource Tampa Bay for which to base much of the methodology on.⁸ The continuum is broken into three phases:

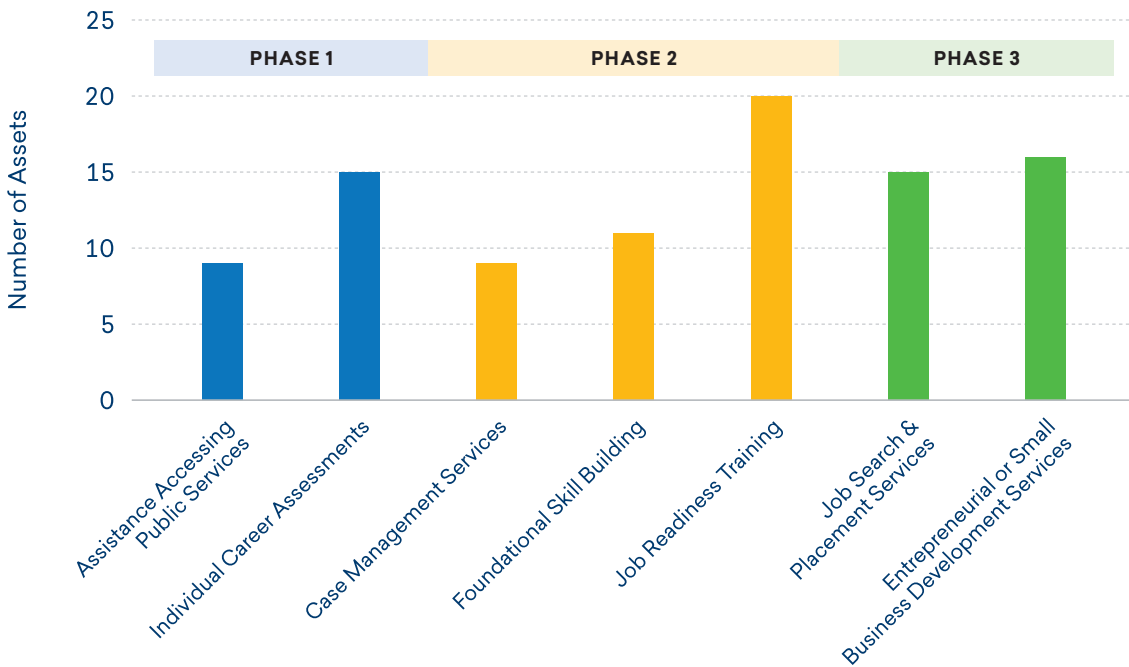
1. **Intake** – During this phase, individuals enter the system and are evaluated based on their needs. They are either referred to other services or given individual career assessments to help direct them in their job path.
2. **Skill Building & Readiness** – During this phase, individuals are actively coached to help increase their chances of job success. Foundational skills and job readiness training occurs during this phase.

8 Workforce Asset Mapping Report for Workforce Solutions Borderplex, PCG | Human Services, 2017

3. Placement – During this phase, the individual is ready to be placed in a job or begin his/her job search in earnest. Assets help the individual find jobs or actively connect employers with these individuals.

Given this continuum, researchers mapped the assets that provide Employment Services based on the mix of services they offer in the continuum. It appears among the 43 unique asset locations that provide Employment Services, most tend to emphasize the latter part of the continuum (job readiness training, job search & placement, entrepreneurial or small business development). Few explicitly state a dedication to assistance accessing public services, or case management services. Foundational skill building and case management service offerings could be improved.

Figure 11: **EMPLOYMENT SERVICES ASSETS BY SUBCATEGORY, HILLSBOROUGH COUNTY**

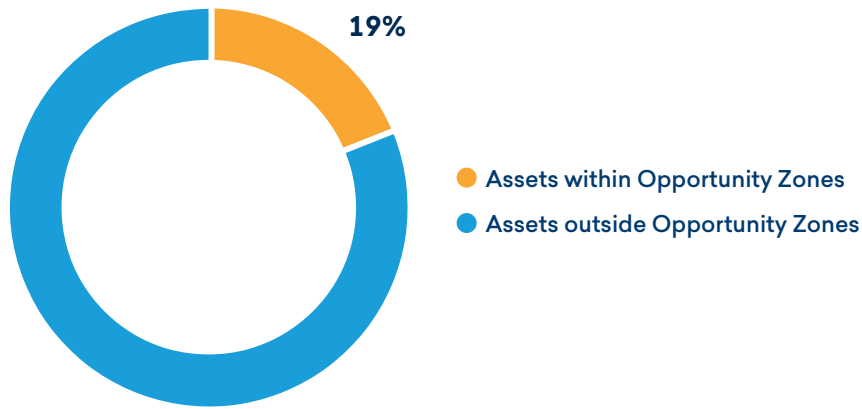


Source: Emsi Burning Glass

Opportunity Zones

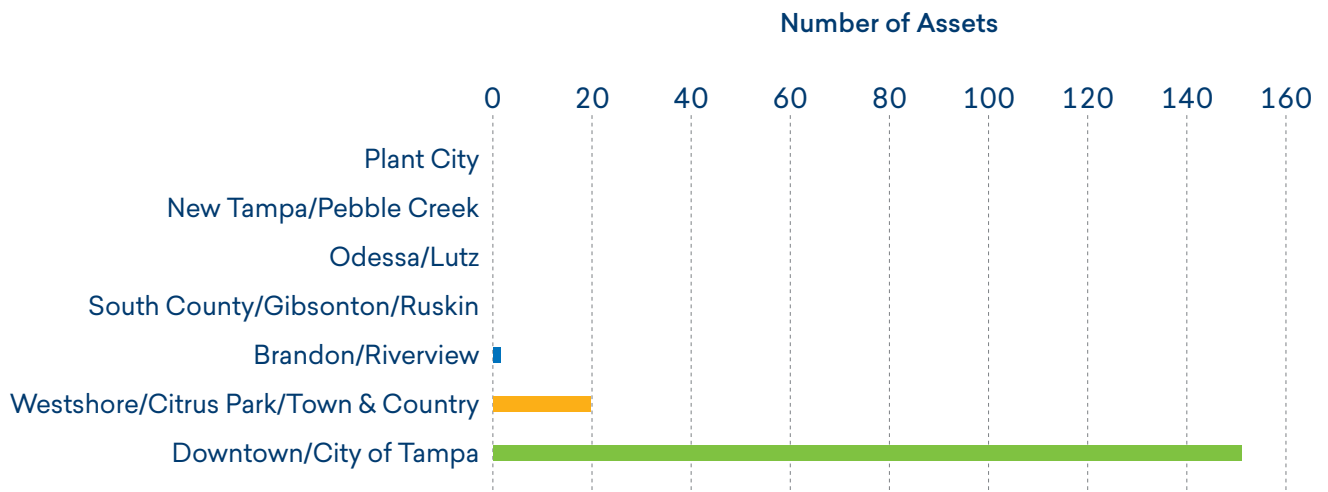
Hillsborough County has several areas of economically distressed communities which are Designated Qualified Opportunity Zones (Opportunity Zones). However, large swathes of Hillsborough County do not contain Opportunity Zones. Among the seven subregions, most opportunity zones lie completely within either Downtown/City of Tampa or Westshore/Citrus Park/Town & Country. Only a small fragment of Brandon/Riverview has an Opportunity Zone. In total, just 19% of all Hillsborough County assets lie within Opportunity Zones.

Figure 12: **SHARE OF ASSETS WITHIN OPPORTUNITY ZONES, HILLSBOROUGH COUNTY**



Source: Emsi Burning Glass

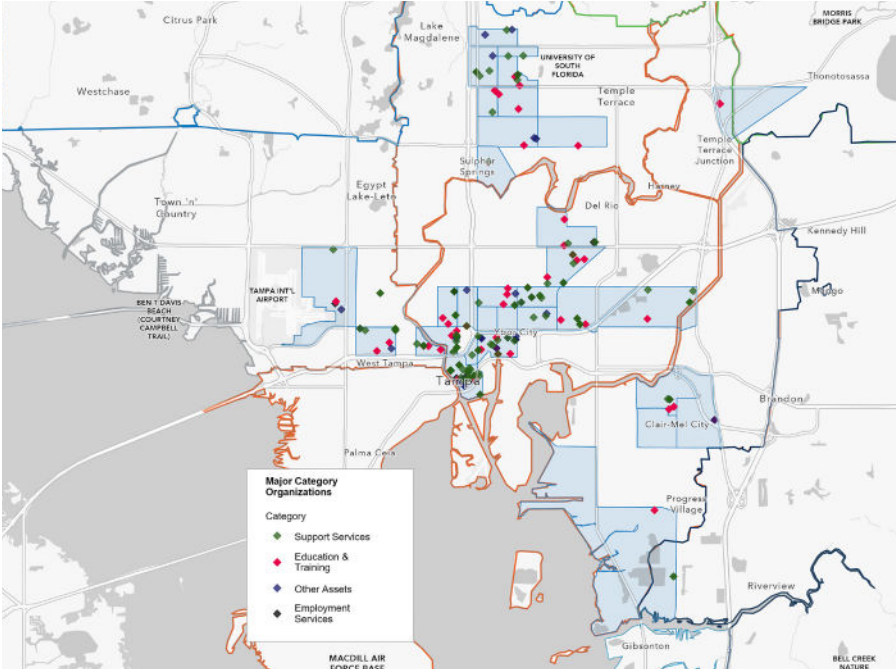
Figure 13: **TOTAL ASSETS WITHIN OPPORTUNITY ZONES BY SUBREGION**



Source: Emsi Burning Glass



Figure 14: MAP OF ASSETS WITHIN OPPORTUNITY ZONES



Source: Emsi Burning Glass

There are 88% (or 151) of assets within in Opportunity Zones in the Downtown/ City of Tampa subregion. Only 19 assets lie within Westshore/Citrus Park/Town & Country and a single asset (Lighthouse Gospel Mission Inc. & Faith Home) is in the Brandon/Riverview subregion. Less than half of assets offering Employment Services lie within Opportunity Zones (15 of 43). Furthermore, among these assets, most focus on entrepreneurial or small business development rather than services for typical job seekers.

This is an area with an opportunity for improvement. For instance, coordinating private investment opportunities with philanthropic efforts aimed at Employment Services (and Education & Training) for low-income individuals in Opportunity Zones could help all parties involved.

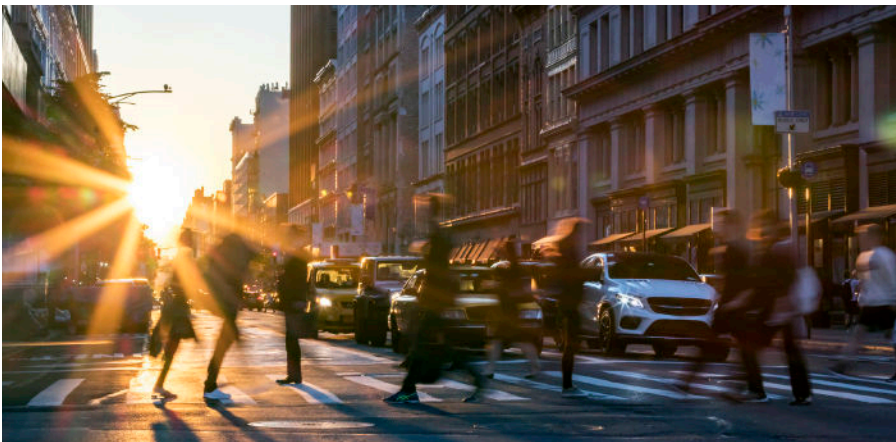


Table 3 - **EMPLOYMENT SERVICES IN OPPORTUNITY ZONES**

Asset	Employment Services Offered
5508 Small Business Accelerator	Entrepreneurial or Small Business Development Services
CoLabs	Entrepreneurial or Small Business Development Services Individual Career Assessments
Corporation to Develop Communities of Tampa Inc.	Job Readiness Training Job Search & Placement Services
Embarc Collective	Entrepreneurial or Small Business Development Services
Entrepreneur Collaborative Center	Entrepreneurial or Small Business Development Services Individual Career Assessments
Human Development Center Inc.	Foundational Skill Building Job Readiness Training
I AM Group Foundation	Individual Career Assessments Foundational Skill Building
Minority & Small Business Development	Entrepreneurial or Small Business Development Services
Minority Business Accelerator	Entrepreneurial or Small Business Development Services
Operation Hope	Entrepreneurial or Small Business Development Services
Pepin Academies	Job Readiness Training
SBDC at USF - Hillsborough	Entrepreneurial or Small Business Development Services
Service Corps of Retired Executives- SCORE	Entrepreneurial or Small Business Development Services
Tampa Bay Wave	Entrepreneurial or Small Business Development Services
InLab@HCC Veterans	Entrepreneurial or Small Business Development Services

Source: Emsi Burning Glass

Downtown/City of Tampa Subregion

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
475,723	16%	431	151	0.91

The Downtown/City of Tampa subregion is by far the largest employment area among the subregions. It also has one of the highest poverty rates of 16%, demonstrating the most demand for workforce development assets. The subregion also experiences the most net commuters, with many residents

relying on public transportation to reach work. People living in North Tampa and Ybor City areas tend to be the heaviest public transportation users.

Downtown/City of Tampa’s largest industry is Healthcare & Social Assistance with over 40,000 people employed in this sector. When considering above-average employment for an area of this size, the subregion displays industry concentrations in Construction; Wholesale Trade; Finance & Insurance; Real Estate & Rental & Leasing; and Professional, Scientific & Technical Services.

The Downtown/City of Tampa subregion has many large private employers that act as anchor institutions. Furthermore, they represent numerous industry sectors meaning a myriad of skill entry points are available: finance, healthcare, distribution, IT, and even manufacturing is present.

Table 4: DOWNTOWN/CITY OF TAMPA MAJOR EMPLOYERS

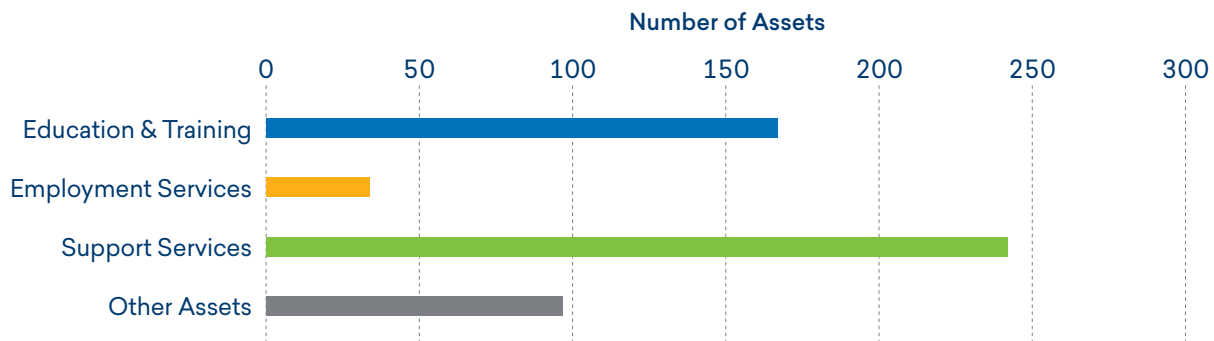
Company Name	Industry
Masonite International Corporation	Corporate HQ
Booz Allen Hamilton	Defense & Security
Jacobs Technology	Defense & Security
Pepin Distributing Company	Distribution & Logistics
Total Quality Logistics	Distribution & Logistics
Citi	Financial & Professional Services
Clayton Holdings LLC	Financial & Professional Services
Coca-Cola Refreshments Customer Care Center	Financial & Professional Services
Concentrix	Financial & Professional Services
Delta Air Lines - Call Center	Financial & Professional Services
Ford Credit Tampa Business Center	Financial & Professional Services
Health Plan One LLC	Financial & Professional Services
Truist	Financial & Professional Services
USAA	Financial & Professional Services
Wells Fargo	Financial & Professional Services
Advent Health Tampa Hospital	Healthcare
HCA Florida South Tampa Hospital	Healthcare
James A Haley Veterans Hospital (and surrounding Clinics)	Healthcare
John’s Hopkin’s Children’s Hospital	Healthcare
Kindred Hospital	Healthcare
Moffitt Cancer Hospital	Healthcare
Tampa General Hospital	Healthcare
TGH Brandon Healthplex	Healthcare
USF Health	Healthcare

Company Name	Industry
Bisk Education	Information Technology
Convergys	Information Technology
ProV International	Information Technology
ReliaQuest	Information Technology
Vector Solutions	Information Technology
LifeLink Foundation	Life Sciences
Quest Diagnostics Incorporated	Life Sciences
Amalie Oil Company	Manufacturing
Chromalloy Castings	Manufacturing
Gopher Resource	Manufacturing
Hendry Marine Industries, LLC	Manufacturing
The Mosaic Company	Manufacturing

Source: Tampa Bay EDC & Tampa Bay Business Journal

This subregion contains the most assets, both in total and on a per capita basis. Support Services are the largest category of assets, followed by Education & Training (which includes K-12). Though Employment Services is the smallest category, Downtown/City of Tampa contains 34 of the 43 assets (or 79%) in the entire county.

Figure 15 - DOWNTOWN/CITY OF TAMPA ASSETS BY CATEGORY



Source: Emsi Burning Glass

ZIP 33602 and ZIP 33619 (true Downtown Tampa) contain the most jobs in this subregion. As demonstrated by this map, one of the areas with the highest density of assets is also the one with the highest concentration of employment.

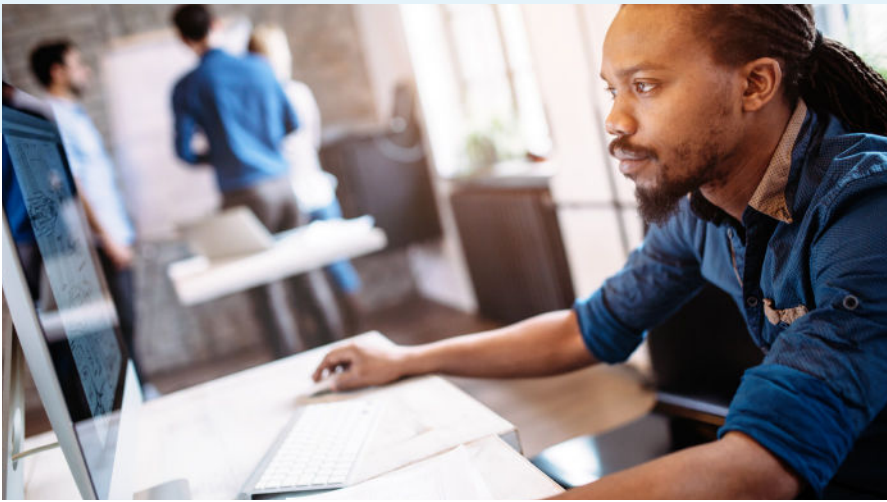
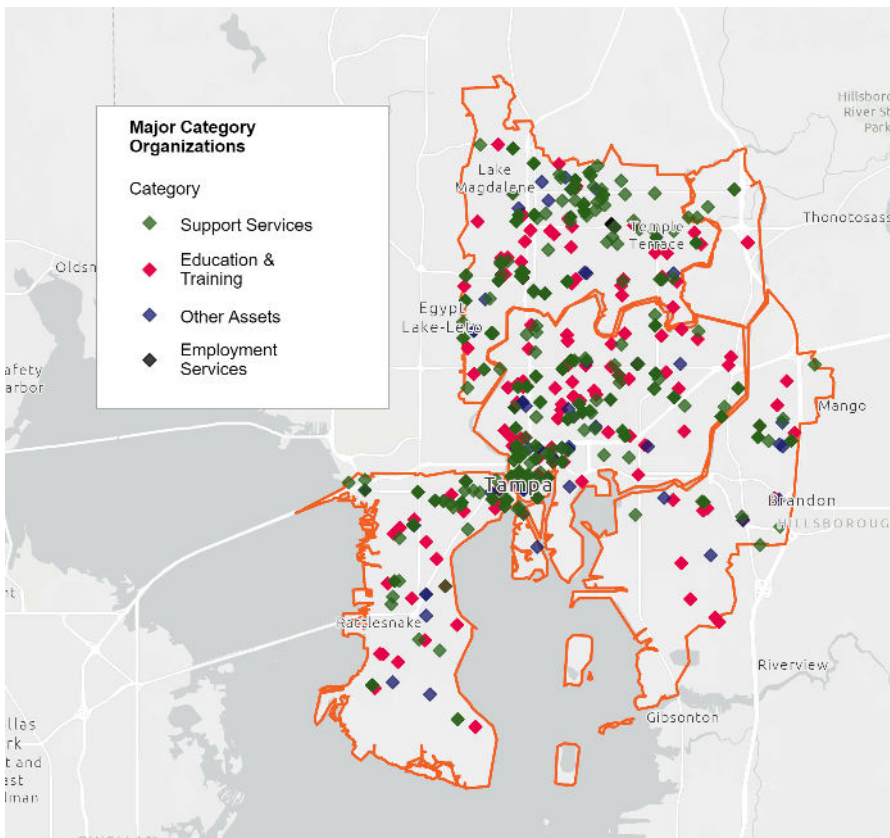


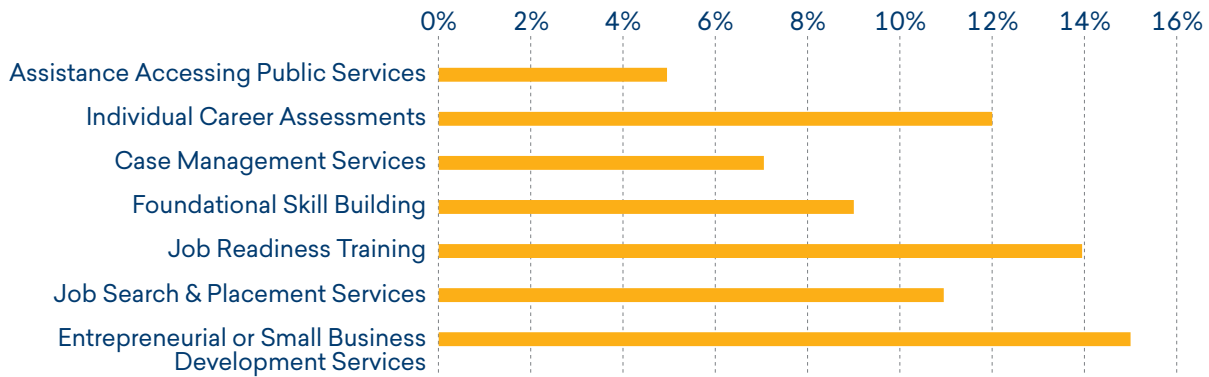
Figure 16 - MAP OF DOWNTOWN/CITY OF TAMPA ASSETS BY CATEGORY



Source: Emsi Burning Glass

While the largest employment areas in this subregion are Downtown (ZIP 33602 and ZIP 33619), the areas experiencing the sharpest poverty rates are North Tampa (31.5%) and Ybor City (24.0%). These high-poverty areas typically experience increased unemployment relative to other areas, since the low-paying occupations tend to have been hardest hit in terms of job losses. As such, high-poverty areas require Employment Services to a greater extent.

Figure 17: **DOWNTOWN/CITY OF TAMPA EMPLOYMENT SERVICES ASSETS BY SUBCATEGORY**



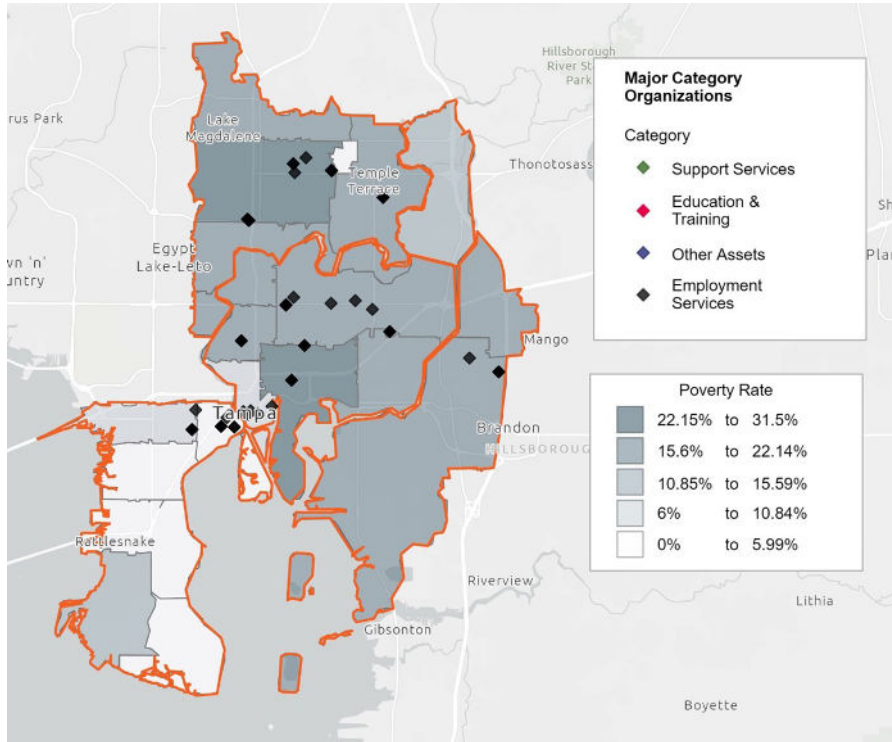
Source: Emsi Burning Glass

As mentioned previously, Downtown/City of Tampa contains the most Employment Services assets of any subregion. The map below shows Employment Services assets relative to the poverty rates across the subregion to demonstrate if impoverished areas have access to needed resources. Although ZIP 33605 (Ybor City) has the highest poverty rate of the subregion, it only contains three Employment Services assets: The Entrepreneur Collaborative Center, the SBDC at USF – Hillsborough location, and the Service Corps of Retired Executives. All these assets are focused on entrepreneurship and not the typical services needed by the impoverished or unemployed.

North Tampa (ZIP 33612) is tied for the most Employment Services assets of any of the subregion’s ZIP codes. It is also the most populated. However, in terms of assets per capita, this area lags Downtown (ZIP 33602) – which is a major employment area but not large in terms of residential population. Again, as a business center, these assets are focused on entrepreneurship. The assets in ZIP 33612 provide services beyond entrepreneurship, such as individual career assessments, job readiness training, etc. These assets include CareerSource Tampa Bay, I AM Group Foundation, Operation Hope, and Vocational Rehabilitation.

Some areas lack Employment Services entirely, most notably the interbay peninsula.

Figure 18: **MAP OF DOWNTOWN/CITY OF TAMPA EMPLOYMENT SERVICES ASSETS**

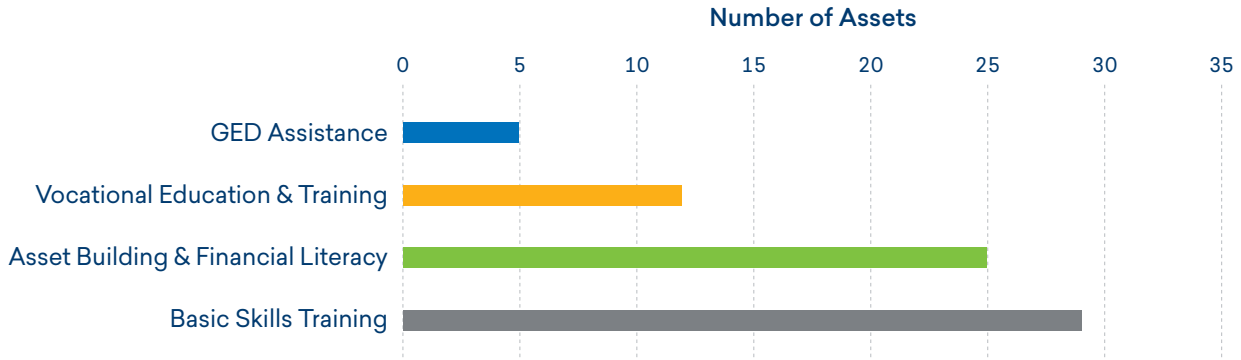


Source: Emsi Burning Glass

Underserved communities also require Education & Training services to a higher degree. Often the poorest demographics lack enabling certifications (such as a high school diploma or GED) or key vocational skills to obtain meaningful employment. The subsequent map demonstrates Education & Training services assets (excluding K-12 and universities) relative to the poverty rates across the subregion.



Figure 19: DOWNTOWN/CITY OF TAMPA EDUCATION & TRAINING ASSETS BY SUBCATEGORY (NON-K-12)

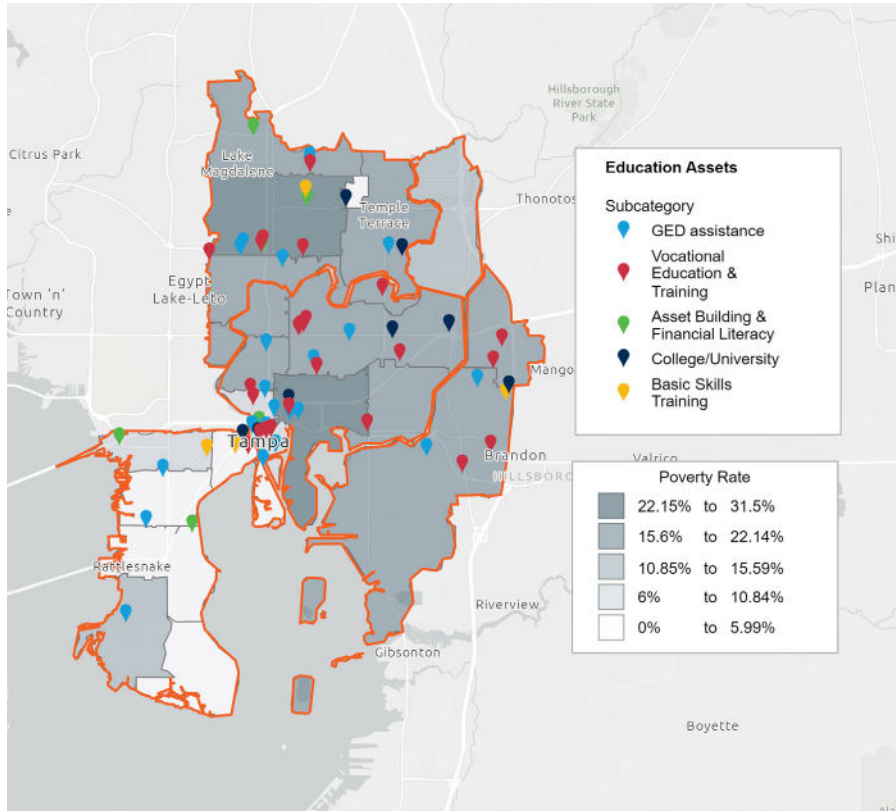


Source: Emsi Burning Glass

ZIP 33602 (Downtown) again has the most assets among the subregion’s ZIP codes, as well as the highest density of Education & Training assets relative to population size (per capita). This ZIP code also has the most assets providing GED assistance, despite its small population size. Although North Tampa has insufficient GED assistance assets, it has the most in the subregion with services for asset building and financial literacy. While ZIP 33610 (Belmont Heights and East Lake) has three technical colleges dedicated to vocational education; North Tampa (ZIP 33612) has none.



Figure 20: **MAP OF DOWNTOWN/CITY OF TAMPA
EDUCATION & TRAINING ASSETS**

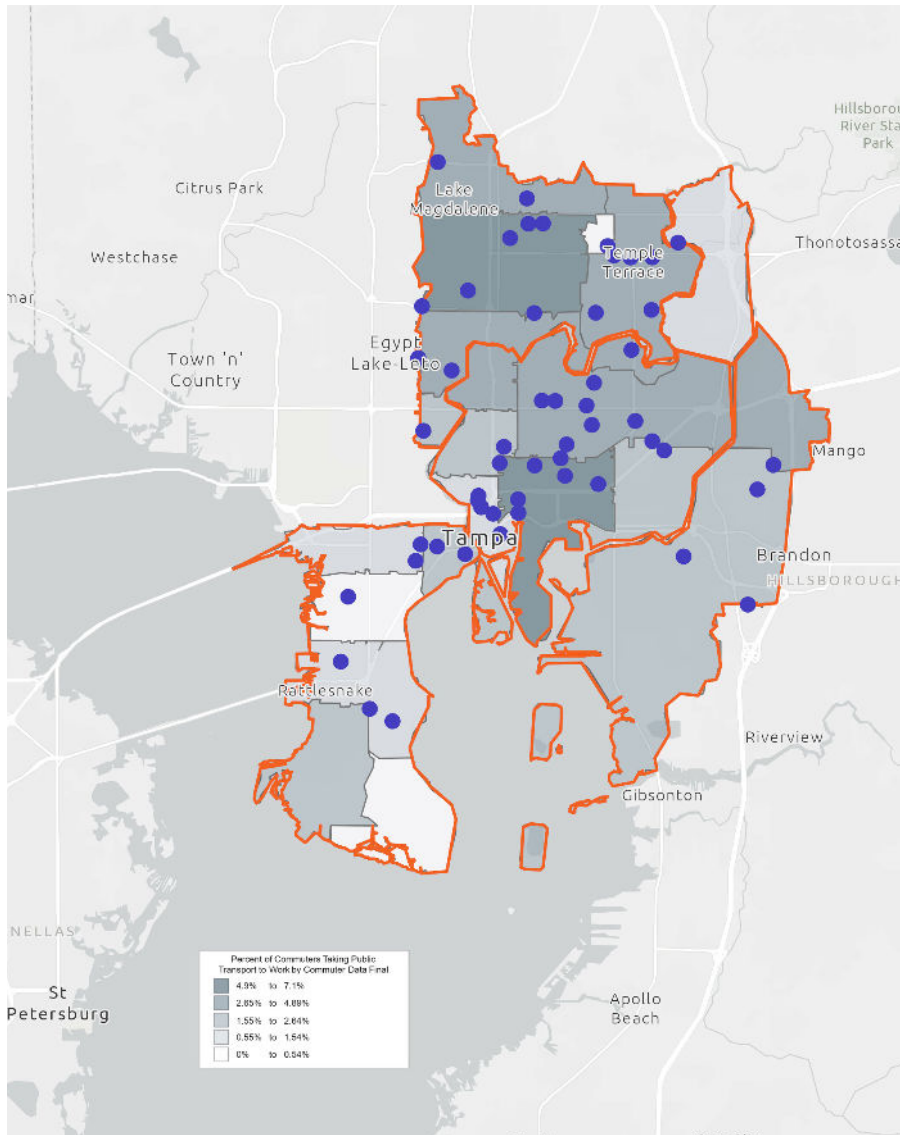


Source: Emsi Burning Glass

As areas with a high percentage of the population living in poverty, ZIPs 33605 (Ybor City) and 33612 (North Tampa) have populations that are more reliant on public transportation as a means of commuting to work. Public transportation has many benefits, but it does not offer as much flexibility as driving a personal vehicle. Employed parents who rely on public transportation might prefer to have childcare options closer to work to make the commute back and forth - followed by journeys picking up and dropping off children - less arduous. Compared to other subregions, Downtown/City of Tampa's childcare assets per capita are in-line with the rest of the region.

This map demonstrates childcare assets overlaid with demand for public transportation. When analyzing areas within Downtown/City of Tampa, ZIPs 33602 (Downtown) and 33605 (Ybor City) have the highest childcare assets per capita by far. While Downtown is a major employment area, Ybor City does not have that many jobs by comparison. However, it experiences poverty at the highest rate in the subregion and lies sandwiched between the two largest employment centers: ZIP 33602 (Downtown) and 33619 (Palm River-Clair Mel). North Tampa (ZIP 33612) is also a large employment area while also experiencing high poverty rates, yet its childcare assets per capita are half that of ZIPs 33602 and 33605. Some of the smaller population areas in the subregion, such as ZIP 33616 on the interbay peninsula, have no childcare assets.

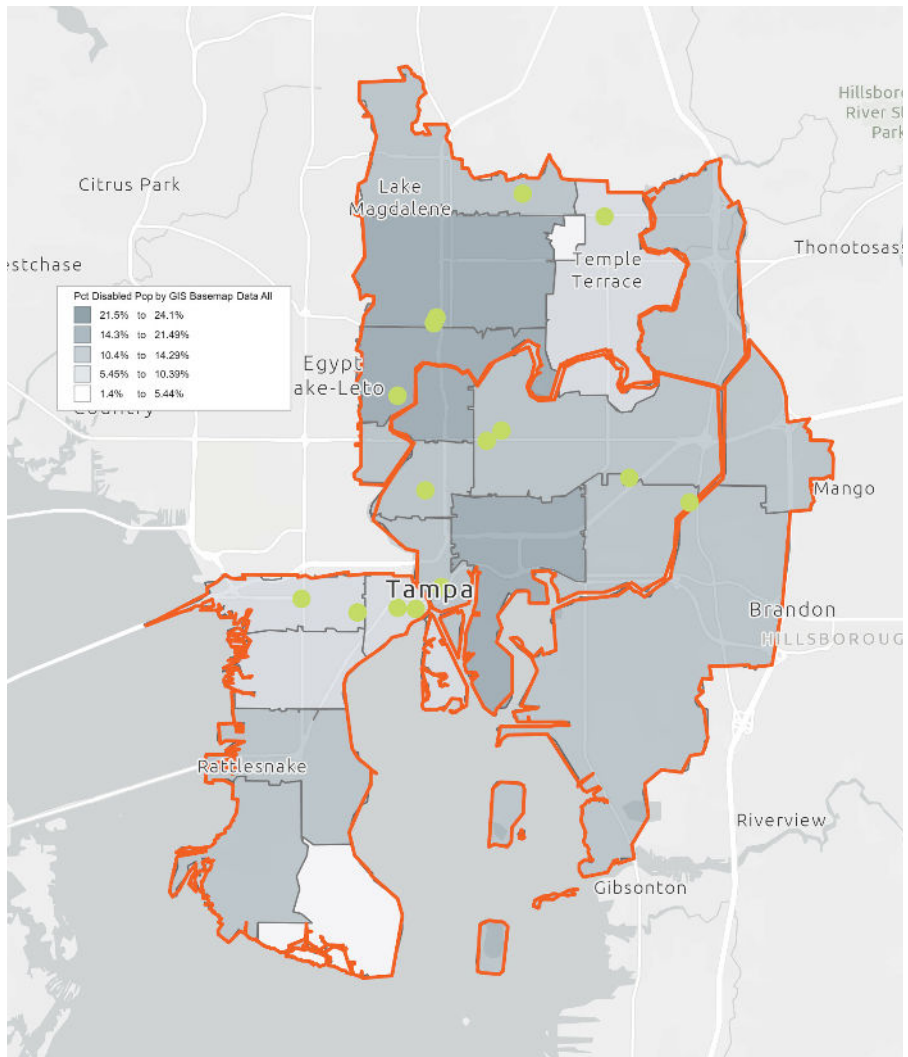
Figure 21: MAP OF DOWNTOWN/CITY OF TAMPA CHILDCARE ASSETS BY PUBLIC TRANSPORTATION COMMUTER RATE



Source: Emsi Burning Glass

The Downtown/City of Tampa subregion has a high concentration of persons with disabilities at 12.6%, just behind Westshore/Citrus Park/Town & Country (13.0%). This population is particularly concentrated within the subregion in ZIP 33612. As such, this area requires assets which provide disability assistance for the local population. As the map demonstrates, there are large areas of the subregion without assets offering disability assistance. Furthermore, the areas with the highest disability rates are not the areas with the highest concentration of disability assistance services. This is a space where realignment could be beneficial.

Figure 22: MAP OF DOWNTOWN/CITY OF TAMPA DISABILITY ASSISTANCE ASSETS BY DISABILITY RATE



Source: Emsi Burning Glass

As mentioned previously, 88% (or 151) of assets within in Opportunity Zones are in the Downtown/City of Tampa subregion. The 151 Opportunity Zone assets in Downtown/City of Tampa account for 35% of all assets in the subregion. Broken down by category types, 41% of Employment Services assets and almost 50% of Other Assets lie within Opportunity Zones in the subregion.

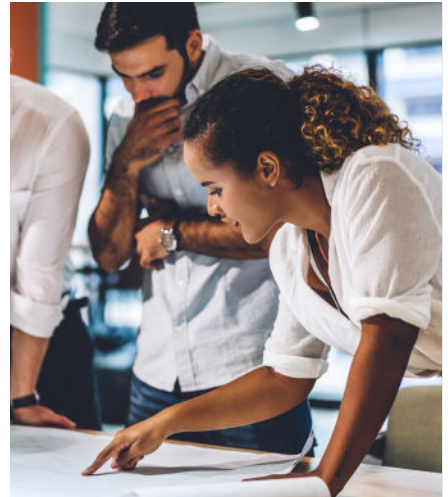
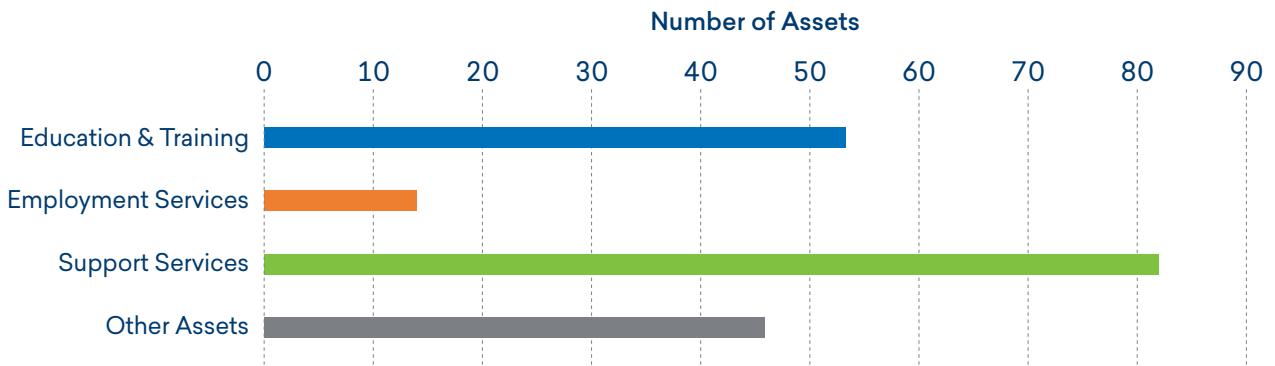
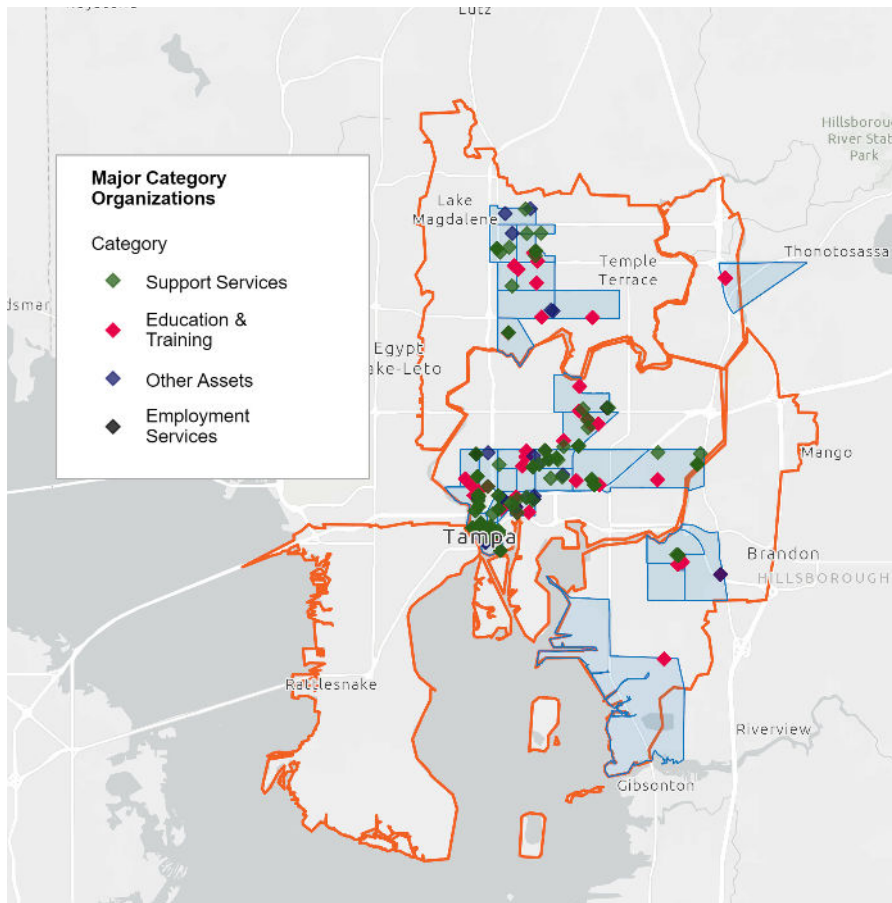


Figure 23: DOWNTOWN/CITY OF TAMPA ASSETS WITHIN OPPORTUNITY ZONES



Source: Emsi Burning Glass

Figure 24: MAP OF DOWNTOWN/CITY OF TAMPA ASSETS WITHIN OPPORTUNITY ZONES



Source: Emsi Burning Glass

Key Recommendations

- Bring more childcare assets in the high-employment area between I-75 and Hwy 301. This area has low density of childcare relative to employment in the area – workers would benefit from more childcare nearby.
- Explore the need for a technical college in the North Tampa neighborhood (33612).
- Align vocational education assets with area industry: Help residents in Personal Care & Service transition into Healthcare and Finance (two large and higher-paying industries of the subregion). Identify entry-level skills needs of these industries and connect with Education and Employment Services assets.
- Attract more disability assistance assets to Ybor City, an area with a high share of persons with disabilities.

Westshore/Citrus Park/Town & Country

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
164,744	14.3%	116	19	0.70

The Westshore/Citrus Park/Town & Country subregion is one of the slower-growing subregions in Hillsborough County and its population reached over 164,000 people in 2020. Though its population is smaller than both Brandon/Riverview and Odessa/Lutz, it contains more jobs than both subregions. One of the major employers is the Tampa International Airport, which contributes to making ZIP 33607 one of the largest employment areas in Hillsborough County.

Westshore/Citrus Park/Town & Country has the second-most employment in the county. It has industry concentrations in Information; Finance & Insurance; Real Estate & Rental & Leasing; Professional, Scientific, & Technical Services; Management of Companies & Enterprises; and Administrative & Support & Waste Management & Remediation Services. The subregion has many of the county's largest private employers including JPMorgan Chase and ConnectWise. Its largest sector is Administrative & Support & Waste Management & Remediation Services.

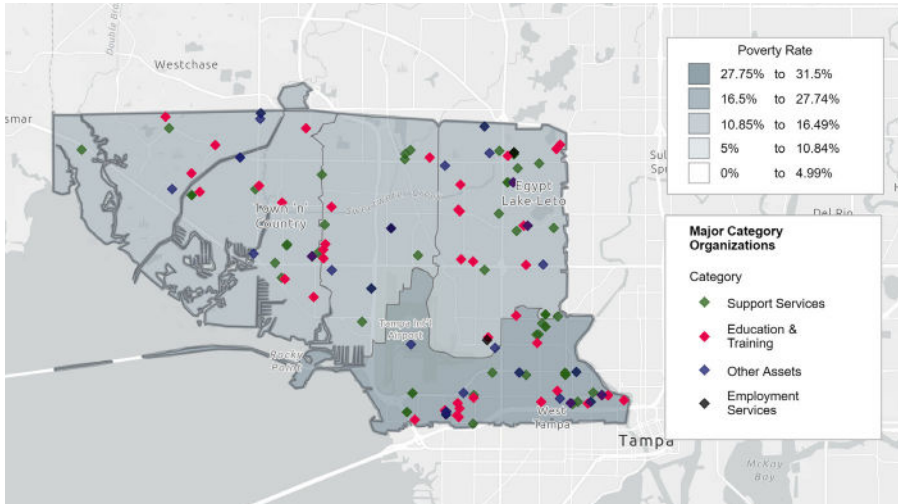
Table 5: WESTSHORE/CITRUS PARK/TOWN & COUNTRY MAJOR EMPLOYERS

Company Name	Industry
Bloomin Brands	Corporate HQ
Primo Water Corporation	Corporate HQ
CAE USA Military Simulation & Training	Defense & Security
WellCare	Financial & Professional Services
JPMorgan Chase	Financial & Professional Services
PwC-Tampa	Financial & Professional Services
Humana	Financial & Professional Services
Aetna Inc - Tampa	Financial & Professional Services
OneTouch Direct	Financial & Professional Services
Capital One	Financial & Professional Services
New York Life	Financial & Professional Services
Pennymac Loan Services	Financial & Professional Services
AVI-SPL, Inc	Financial & Professional Services
Independent Financial Partners	Financial & Professional Services
Tranzact	Financial & Professional Services
Alorica	Financial & Professional Services
HCA Florida West Tampa Hospital	Healthcare
St Joseph's Hospital	Healthcare
Tampa Community Hospital	Healthcare
ConnectWise	Information Technology
Greenway Health	Information Technology
Nextech	Information Technology
Webstaurant Store Inc.	Information Technology
AgileThought	Information Technology
CGS - Tampa	Information Technology
Amgen	Life Sciences
Bristol Myers Squibb	Life Sciences
Gerdau-Tampa	Manufacturing
Global Widget LLC	Manufacturing

Source: Tampa Bay EDC & Tampa Bay Business Journal

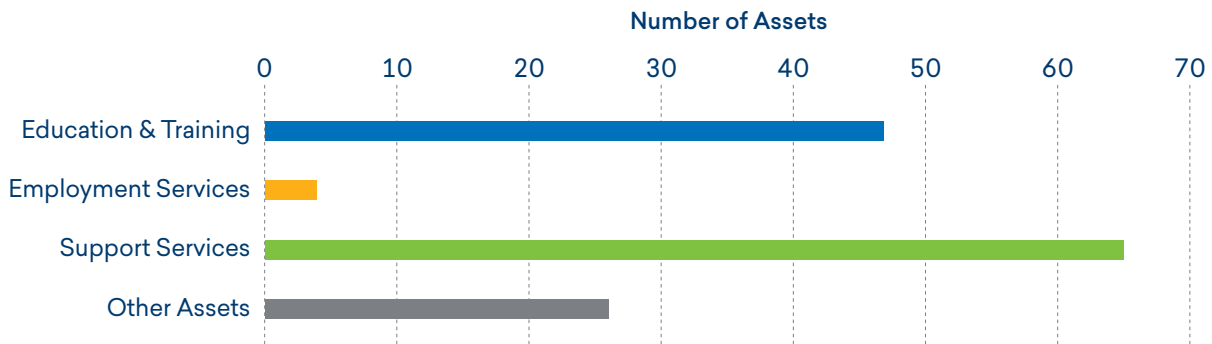
With 116 unique workforce asset locations, this subregion has the second-highest asset per capita ratio among the seven subregions of Hillsborough County. This subregion has the second highest poverty rate at 14.3% and the second-lowest education attainment rates among subregions. As such, the subregion experiences an increased demand for services.

Figure 25: **MAP OF WESTSHORE/CITRUS PARK/TOWN & COUNTRY ASSETS BY CATEGORY**



Source: Emsi Burning Glass

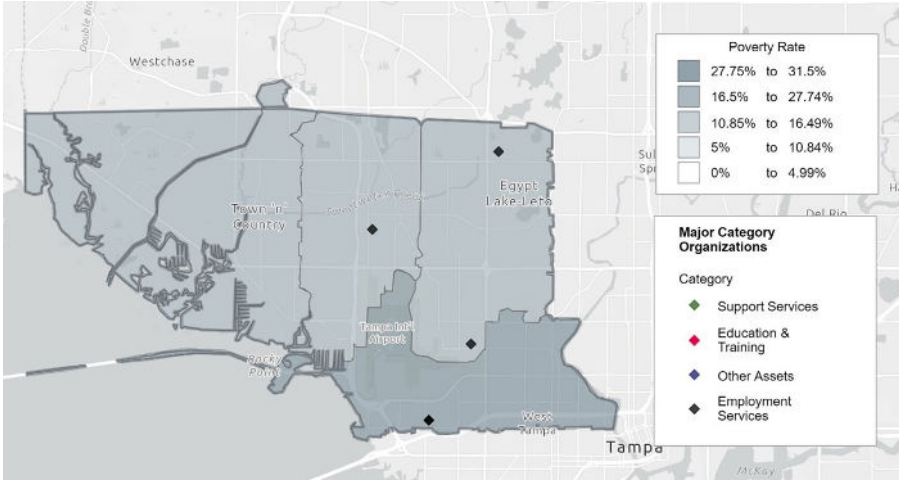
Figure 26: **WESTSHORE/CITRUS PARK/TOWN & COUNTRY ASSETS BY CATEGORY**



Source: Emsi Burning Glass

The high poverty of Westshore/Citrus Park/Town & Country is most intense in ZIP 33607 (Westshore) with a poverty rate of 17.0%. Still, despite the poverty rate of the subregion, Westshore/Citrus Park/Town & Country only has limited assets providing Employment Services: All Support Servicing, AMI Kids, InLab@ HCC Veterans, MacDonalcd Training Center, Tampa Vet Center, and TampaBay-Job-Links. Given so few assets, there are some areas with no Employment Services assets, as demonstrated by the map below. In fact, ZIP 33615 (Town & Country) has a population of over 47,000, with no Employment Services assets. Meanwhile, though ZIP 33607 (Westshore) experiences the most poverty in the subregion, it benefits from TampaBay-Job-Links.

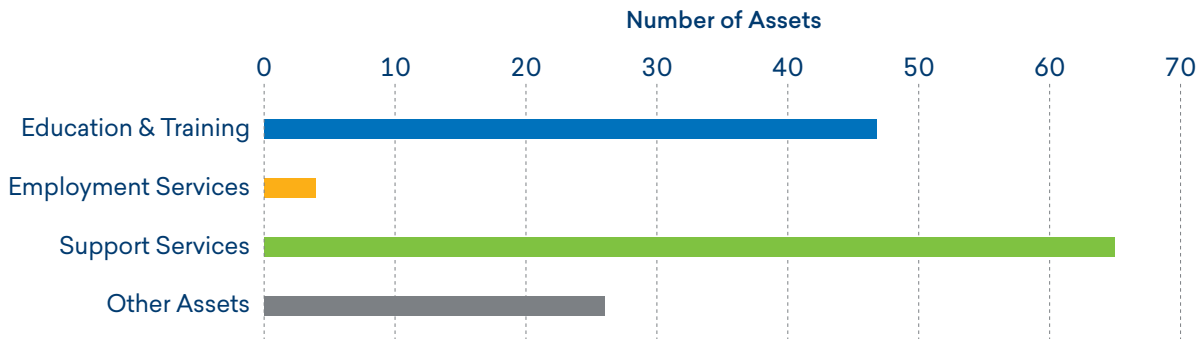
Figure 27: **MAP OF WESTSHORE/CITRUS PARK/TOWN & COUNTRY EMPLOYMENT SERVICES ASSETS**



Source: Emsi Burning Glass

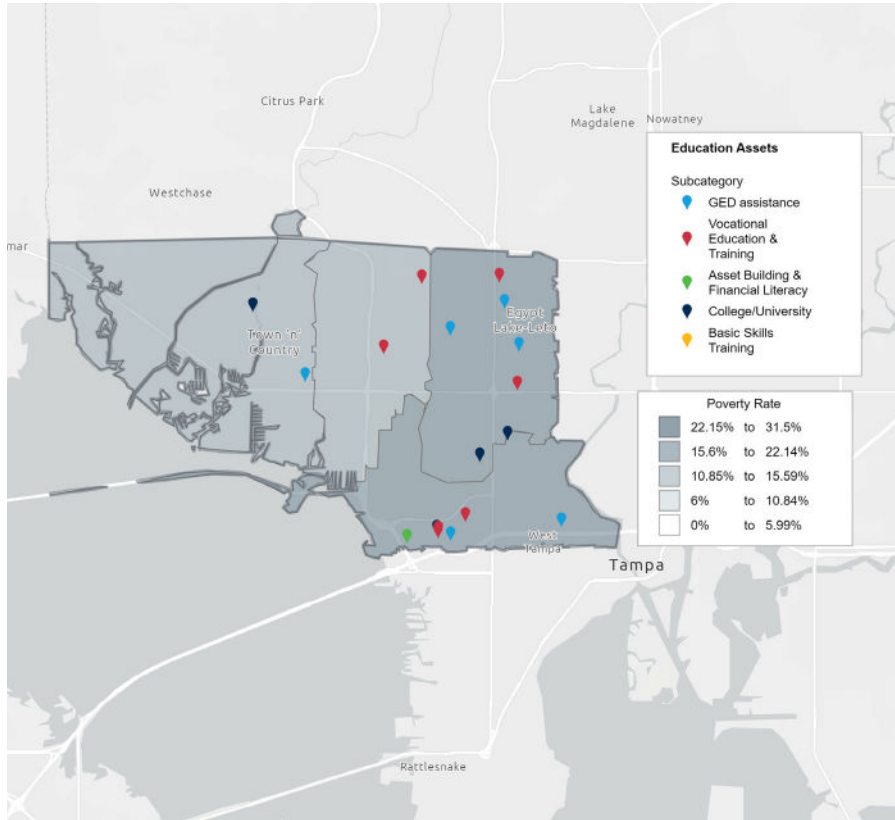
Regarding Education & Training assets that could benefit the underserved, the area experiencing the most poverty of the subregion does have the most assets (K-12 and university locations excluded). ZIP 33607 has the most assets, with 6 – though none are technical colleges through the public school system. In fact, there are no technical colleges in the entire subregion. There are two adult schools which allow individuals to earn their GED.

Figure 28: **WESTSHORE/CITRUS PARK/TOWN & COUNTRY EDUCATION & TRAINING ASSETS BY SUBCATEGORY (NON-K-12)**



Source: Emsi Burning Glass

Figure 29 - MAP OF WESTSHORE/CITRUS PARK/TOWN & COUNTRY EDUCATION & TRAINING ASSETS (NON-K-12)



Source: Emsi Burning Glass

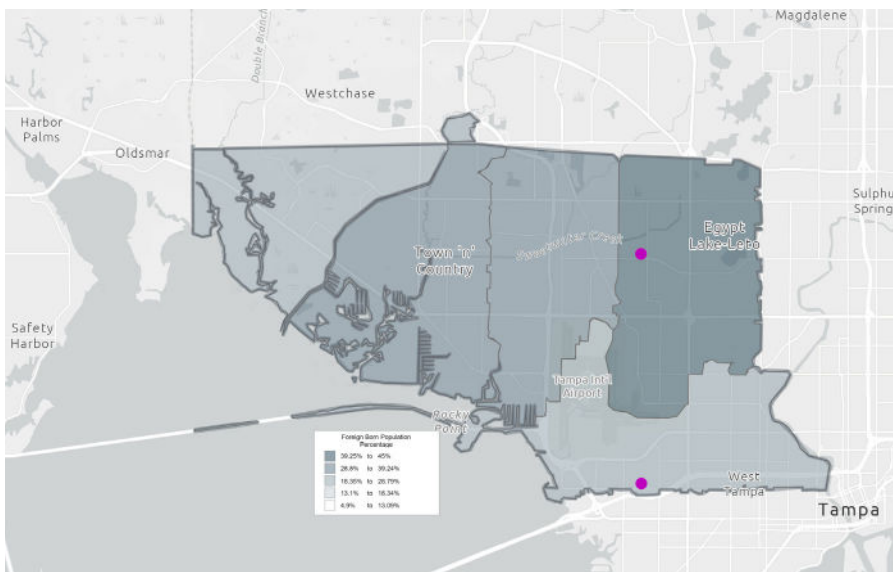


Although the subregion may have the smallest veteran population share among subregions, it does stand out for its extremely high immigrant population. Almost 35% of Westshore/Citrus Park/Town & Country residents are foreign-born, which is much higher than any other subregion. The highest concentration of these foreign-born residents is in ZIP 33614 (the areas of Drew Park, Pinecrest West Park, and Egypt Lake-Leto).

With a large foreign-born population, language assistance should be considered an important asset to serve the community. However, few assets offer language services. Though Westshore/Citrus Park/Town & Country has two adult schools (Leto Adult and Jefferson Adult) which offer ESOL, Downtown/City of Tampa contains more assets offering such assistance.



Figure 30: **MAP OF WESTSHORE/CITRUS PARK/TOWN & COUNTRY LANGUAGE SUPPORT ASSETS**



Source: Emsi Burning Glass

Finally, the Westshore/Citrus Park/Town & Country subregion has the highest rate of individuals with disabilities among subregions at 13.0%. Four assets offer disability assistance in the subregion: the Social Security Administration office, All Support Servicing, MacDonald Training Center, and the Sunrise Group. Of the county assets offering disability assistance services, roughly 80% are in Downtown/City of Tampa. Six of these assets are in neighboring ZIP codes (33602, 33603, 33604, and 33606). These assets include:

- Hillsborough County Department of Aging Services
- Hillsborough County Developmental Center
- Human Development Center Inc.
- UCP of Tampa Bay – Sunrise Children’s Services
- Tampa Lighthouse for the Blind
- The Helen Gordon Davis Centre for Women

Key Recommendations

- TampaBay-Job-Links is the most critical Employment Services asset in the subregion. Collaborate with the organization to create relationships with anchor employers of the subregion. Help Education & Training assets to align skills with area demand.
- Incorporate IT and office skills into Adult School curriculum.
- There are no logistics or aviation-related programs at the HCC Dale Mabry campus despite the presence of the airport. Explore the option to bring airport-related programming to HCC Dale Mabry campus.
- There are numerous IT training providers in the subregion: Center for Technology Training, Computer Coach Training Solutions, and New Horizons Tampa Bay. Create a symbiotic network of relationships between TampaBay-Job-Links, area IT trainers, and major IT and Finance/ Professional Services employers.
- Help Food Service workers (which is a large occupation category in the subregion) and other low-paying occupations transition to IT and logistics-related roles.
- Given the large foreign-born population of the subregion, ensure bilingual training availability for key skills (IT, finance, logistics, etc.).
- Given the relatively large share of population with disabilities, connect major employers to nearby disability assistance assets, including All Support Servicing, the Sunrise Group, and MacDonald Training Center. Explore what capabilities TampaBay-Job-Links has to support this target population and supplement accordingly.



Brandon/Riverview

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
297,917	7.3%	132	1	0.44

The Brandon/Riverview subregion grew over 10% between 2015 and 2020, reaching a population of almost 300,000 and making it the second largest subregion in Hillsborough County. Despite this large population, only 90,000 jobs are in the subregion, meaning this subregion experiences many daily commuters working in other areas. The largest concentration of jobs (about 32,000) is focused within ZIP 33511 at the center of Brandon/Riverview. The suburban characteristic of Brandon/Riverview is also reflected in its relatively low poverty rate of 7.3%, the second lowest among subregions.

Despite being a large commuter subregion, Brandon/Riverview has the third-most employment of all subregions. As a more suburban area, its largest industry is Retail, with concentrations in Agriculture, Forestry, Fishing & Hunting; Retail; Finance & Insurance; and Accommodation & Food Services.

As demonstrated by the pandemic, Retail and Accommodation & Food Services jobs tend to be more vulnerable to economic downturns than other sectors. They are also low paying. As such, CSTB would do well to help these types of workers in Brandon/Riverview transition to more stable industries such as Healthcare, Finance & Professional Services, and IT.

Compared to Downtown/City of Tampa and Westshore/Citrus Park/Town & Country, Brandon/Riverview has fewer of the county's major private employers. Apart from three hospitals, the subregion's largest employers are corporate headquarters and financial & professional services offices.

Table 6: **BRANDON/RIVERVIEW MAJOR EMPLOYERS**

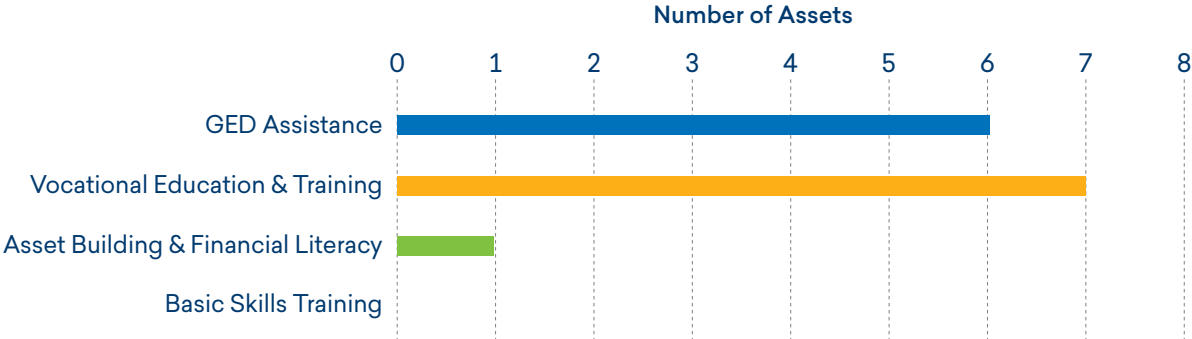
Company Name	Industry
Coca-Cola Beverages Florida	Corporate HQ
Lazydays	Corporate HQ
Blue-Grace Logistics LLC	Distribution & Logistics
Progressive	Financial & Professional Services
Maximus of Virginia, Inc.	Financial & Professional Services
HCA Florida Brandon Hospital	Healthcare
South Hillsborough VA Clinic	Healthcare
St Joseph's Hospital - South	Healthcare

Source: Tampa Bay EDC & Tampa Bay Business Journal



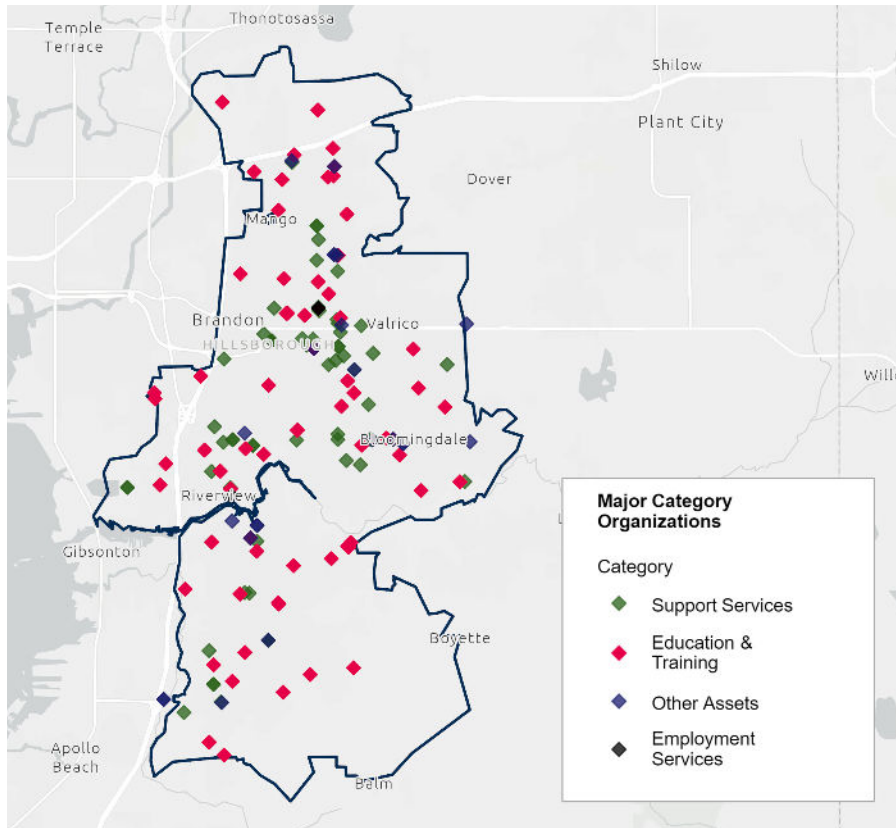
As such a large population area, Brandon/Riverview has over 130 assets, the second highest among subregions. Its assets per capita ratio is in line with other suburban subregions like Odessa/Lutz, South County – Gibsonton/Ruskin, and New Tampa/Pebble Creek.

Figure 31: BRANDON/RIVERVIEW ASSETS BY CATEGORY



Source: Emsi Burning Glass

Figure 32: MAP OF BRANDON/RIVERVIEW ASSETS BY CATEGORY



Source: Emsi Burning Glass

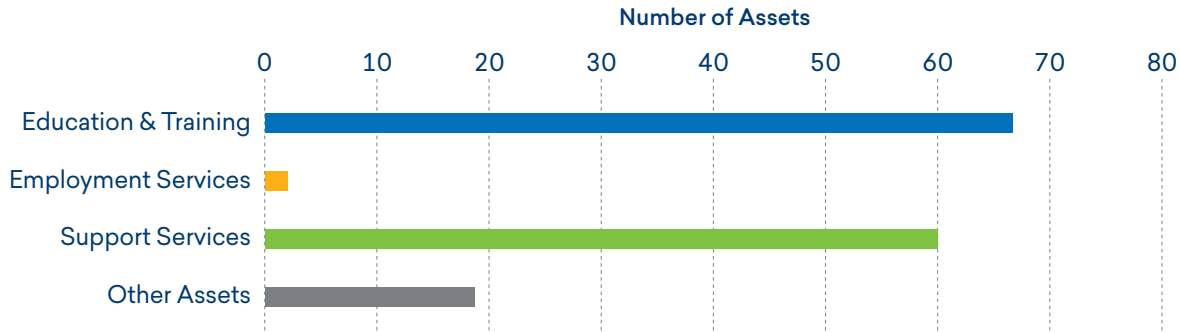
Despite being a commuter town, the fact that the county’s third largest employment subregion of 90,000 jobs only has 2 locations providing Employment Services could be seen as a major gap. These two locations belong to the same organization – ECHO – and can be found in ZIPs 33510 (Brandon) and 33578 (Riverview). Still, no Employment Services assets are in Seffner (ZIP 33584) which experiences the highest poverty rate.

Regarding the Education & Training assets of Brandon/Riverview, there are no university or community college locations within the subregion. Brandon/Riverview only has nine Education & Training assets outside of the K-12 public school system. ECHO has two locations, making the number of locations total 10. The largest number of these non-K-12 assets are in the ZIP code experiencing the most poverty in the subregion, indicating proper alignment. However, there are no technical colleges in the subregion.



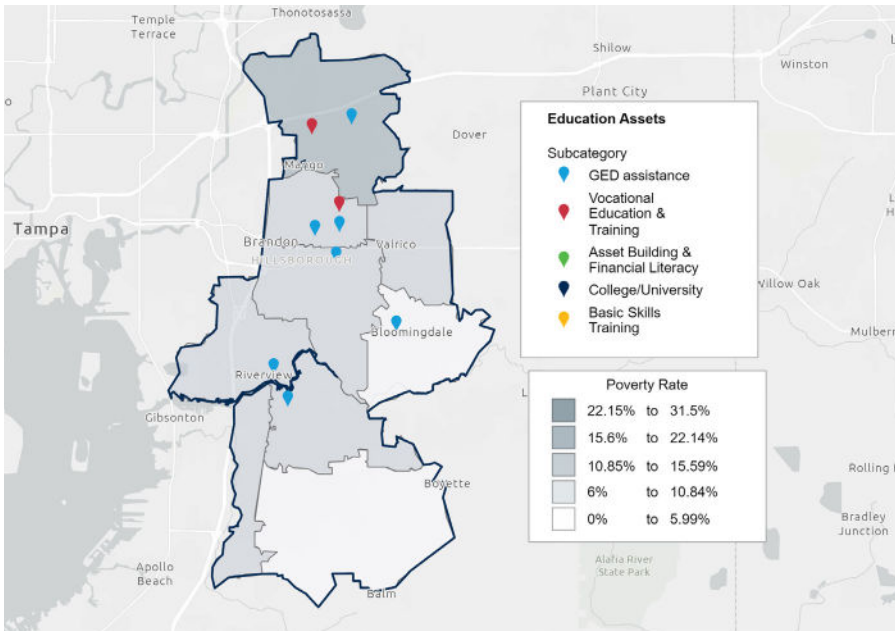
9 The HCC Brandon campus sits on the west side of I-75, within a ZIP code classified under the Downtown/City of Tampa subregion.

Figure 33: BRANDON/RIVERVIEW EDUCATION & TRAINING ASSETS BY SUBCATEGORY (NON-K-12)



Source: Emsi Burning Glass

Figure 34: MAP OF BRANDON/RIVERVIEW EDUCATION & TRAINING ASSETS (NON-K-12)



Source: Emsi Burning Glass

Brandon/Riverview has the second-highest rate of veterans (11.1%) behind South County – Gibsonton/Ruskin. With a population of over 25,000 veterans, there are several assets in the subregion that offer veteran and military services: the South Hillsborough VA Clinic at the lower end of the subregion, Hillsborough County Veterans Services in Brandon, Wounded Warriors in Action in Brandon, and Veterans of Foreign Wars in Riverview. Downtown/ City of Tampa has the most assets offering veteran services despite Brandon/ Riverview having just as many veterans.

Key Recommendations

- Retail and Food Preparation & Serving Related jobs and Farming, Fishing, & Forestry jobs have a high concentration in Brandon/Riverview. Focus on targeting workers in these occupations for transitions to provide higher-paying and more stable employment.
- Both the HCC Brandon Campus and CSTB Brandon Center are technically not in the Brandon/Riverview subregion, leaving a large geographic gap in services. Analyze where most CSTB Brandon Center customers come from to see if there is a misalignment – perhaps an affiliate site at the center of Brandon would be more suitable.
- Work with Hillsborough County Public Schools to see if a technical college in the subregion is needed – currently there are none.
- Establish relationships between the CSTB Brandon Center and veteran services organizations to create a funnel to Employment and Education & Training Services. Ensure CSTB Brandon Center staff are veteran services experts. For instance, ensure they can translate MOC (Military Occupation Classifications) to SOCs (Standard Occupation Classifications) to align veteran skills to employment opportunities.

Plant City

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
95,281	11.3%	58	0	0.61

Plant City is one of the smaller subregions in terms of population size with just 95,281 people. It is also the slowest growing subregion with only 1.8% growth between 2015 and 2020. A benefit of slow growth is a more predictable suite of services needed for the area population.

Plant City's largest industry by employment is manufacturing. It has concentrations in Agriculture, Forestry, Fishing & Hunting; Construction; Wholesale Trade; and Retail. Some of its largest private employers are distribution and logistics locations such as Gordon Food Services and Star Distribution Systems. Such employers could represent alternative employment opportunities for the migrant workers present in the subregion.

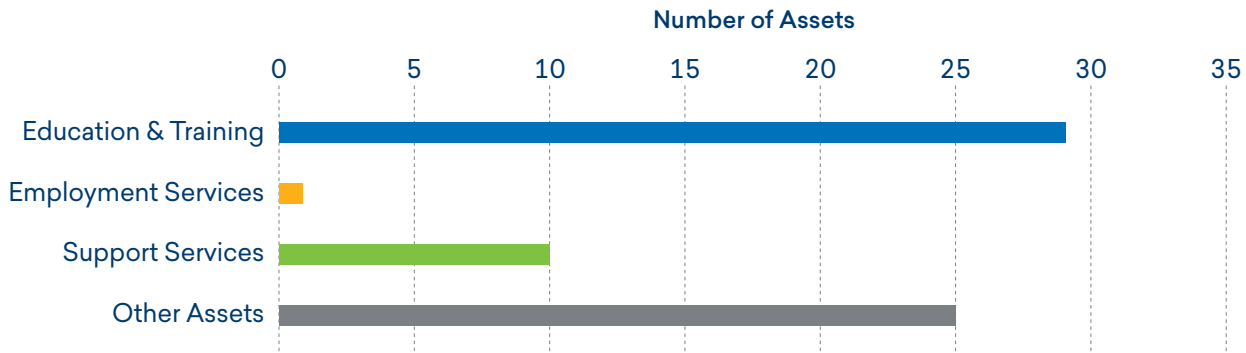
Table 7: **PLANT CITY MAJOR EMPLOYERS**

Company Name	Industry
Gordon Food Services	Distribution & Logistics
Star Distribution Systems	Distribution & Logistics
Baycare - South Florida Baptist Hospital	Healthcare
Tampa Bay Fisheries	Manufacturing
Dart Container	Manufacturing

Source: Tampa Bay EDC & Tampa Bay Business Journal

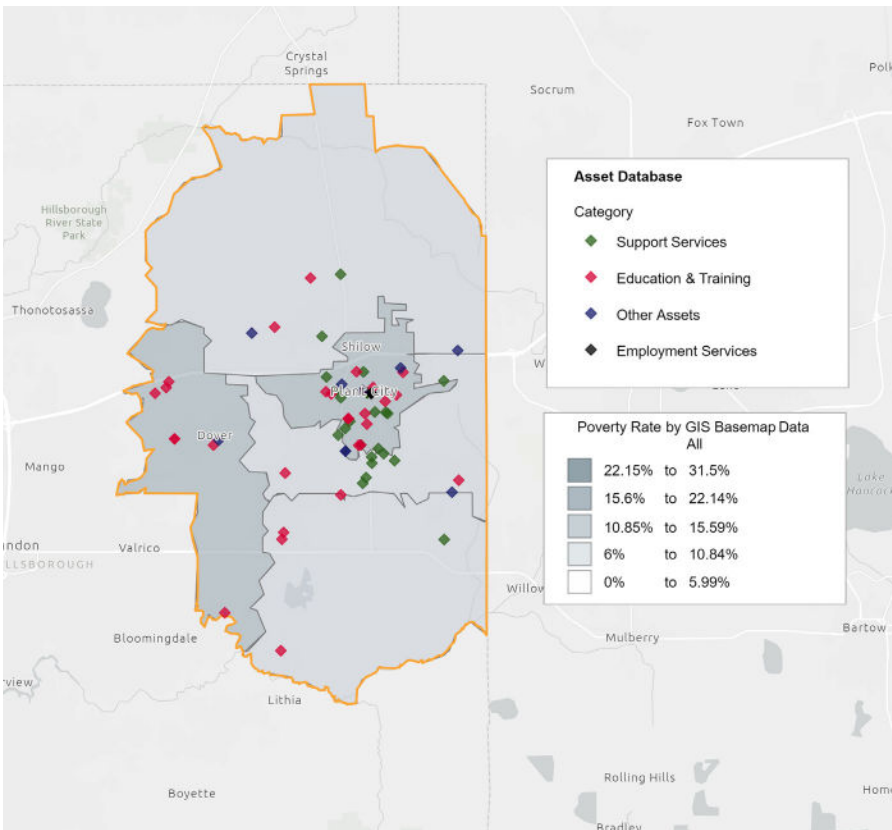
Plant City has among the highest assets per capita ratio among the subregions, despite just 58 assets in the area. Though not as high as Westshore/Citrus Park/Town & Country and Downtown/City of Tampa poverty rates, Plant City has a noticeably higher poverty rate than other subregions (11.3%). However, it only has a few assets providing Employment Services, with two of them focused on persons with disabilities: the CareerSource Tampa Bay Plant City office location, Vocational Rehabilitation, and Vocation Depot. Furthermore, most of the Education & Training assets are public schools K-12.

Figure 35: **PLANT CITY ASSETS BY CATEGORY**



Source: Emsi Burning Glass

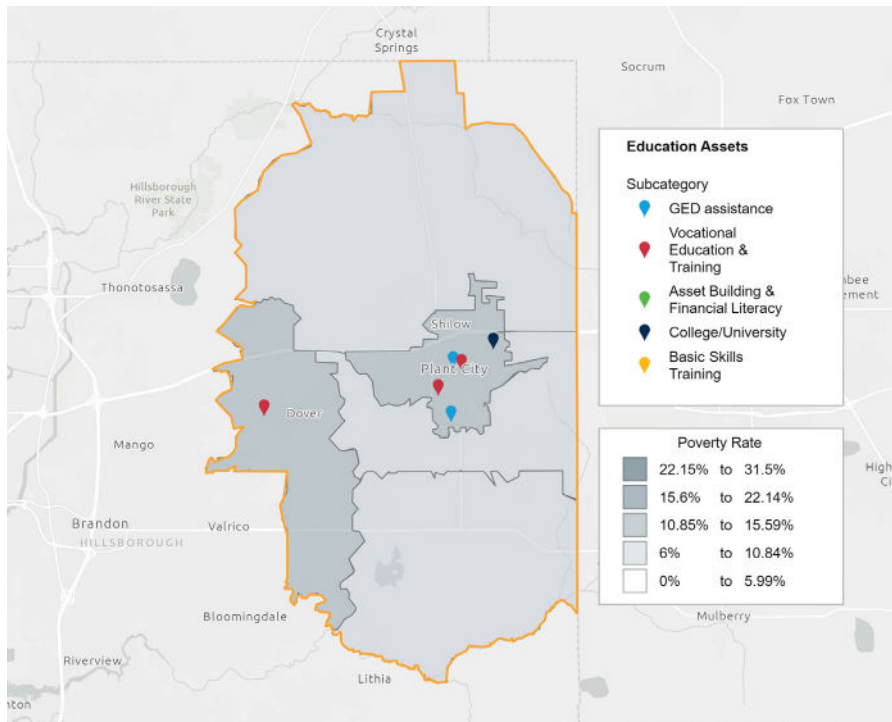




Source: Emsi Burning Glass

Only a few Education & Training assets in Plant City help adults: the HCSB Farmworker Career Development Program, CareerSource Tampa Bay, and Simmons Career Acceleration Academy provide vocational education and training, as does the Hillsborough Community College Plant City Campus. Both the Bruton Memorial Library and Plant City Adult school help adults obtain their GED, but there are no resources in the subregion providing financial literacy and asset building education.

Figure 37: MAP OF PLANT CITY EDUCATION & TRAINING ASSETS (NON-K-12)



Source: Emsi Burning Glass

Table 8: PLANT CITY EDUCATION & TRAINING ASSETS BY SUBCATEGORY (NON-K-12)

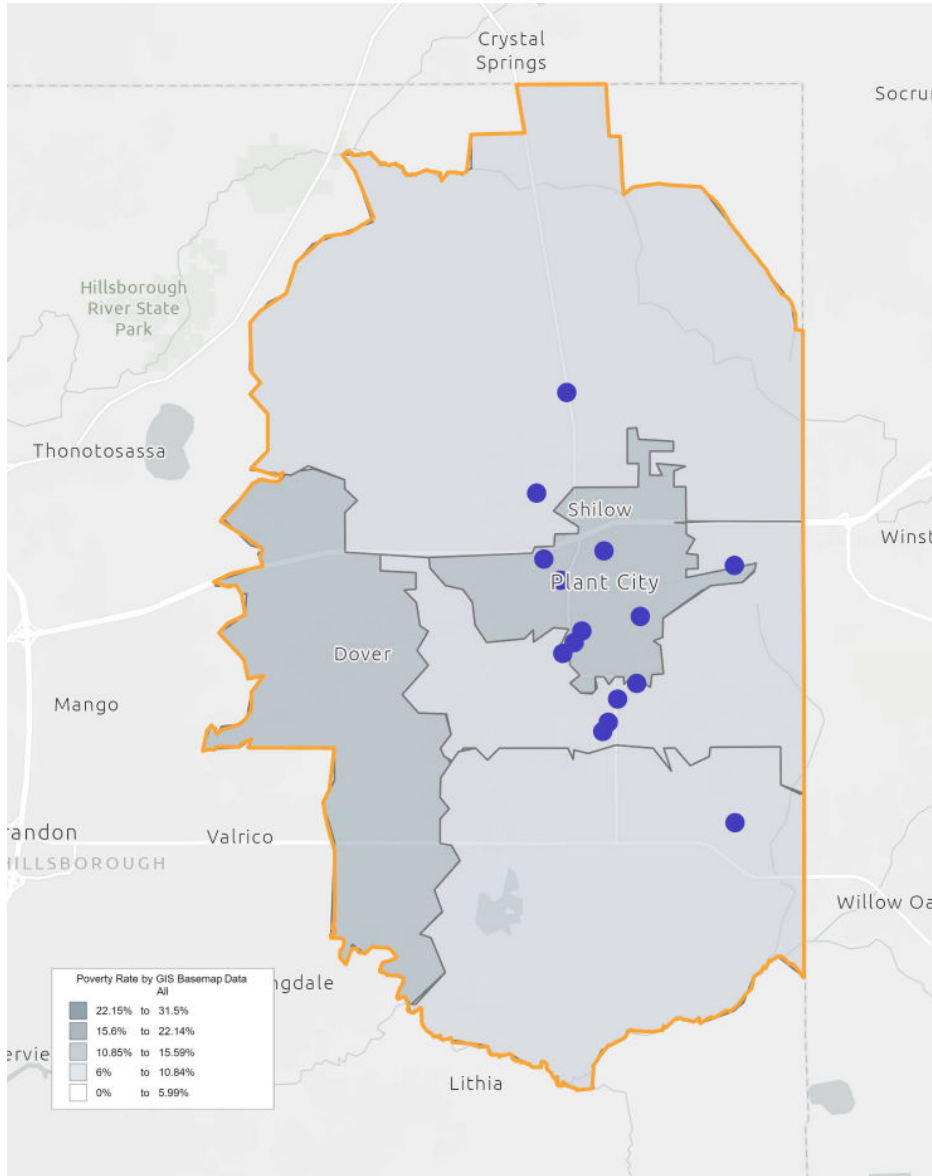
Education & Training Assets	Number of Assets
Basic Skills Training	1
Asset Building & Financial Literacy	0
Vocational Education & Training	3
GED assistance	2

Source: Emsi Burning Glass

One outlier datapoint in which Plant City excels is access to childcare. Plant City has the highest ratio of childcare assets per capita among any of the subregions. This is an often-overlooked support service which, if affordable, can enable low-income people more freedom in employment options.

Furthermore, the childcare availability in Plant City seems oriented towards the migrant population, given the amount of agriculture in the area. The Redlands Christian Migrant Association (RCMA) has three childcare centers in the area. Although data shows that Plant City has the second highest percentage of Hispanics/Latinos, it also shows the subregion as the second lowest percentage of foreign-born. The nature of migrant workers makes the data difficult to capture. Still, given the hints of a larger migrant population in this subregion, language support should also be on the radar. Only Plant City Adult offers ESOL courses in the subregion.

Figure 38: MAP OF PLANT CITY CHILDCARE ASSETS



Source: Emsi Burning Glass

There are two assets offering disability assistance, though the disability rate of Plant City is on par with that of other subregions. These assets are the Vocational Rehabilitation office and Vocation Depot. Regarding veterans, Plant City has the third highest rate of veterans with 8.8% of its residents having served in the military. Yet only the CareerSource Tampa Bay office in Plant City offers veteran assistance. There are no VA clinics in the subregion.

Key Recommendations

- Childcare appears absent from the Dover area. Explore if RCMA has considered the area as a possible location.
- Work with major Plant City employers to establish an agriculture-to-manufacturing/distribution talent pipeline for migrant workers.
- Bring more language support services to Plant City beyond the lone adult school offering ESOL courses.
- Financial literacy & asset building organizations are absent from Plant City. Perhaps use the adult school and library as outreach venues for programming during the agricultural off-season so migrant workers can engage.

Odessa/Lutz

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
193,114	4.6%	89	0	0.46

With a population of 193,114 people in 2020, Odessa/Lutz has grown modestly by 5.4% since 2015. It has the fourth-largest employment of all subregions, with its largest industry in Retail. Odessa/Lutz employment is diverse, with industry concentrations in Utilities; Construction; Finance & Insurance; Real Estate & Rental & Leasing; Professional, Scientific, & Technical Services; Administrative & Support & Waste Management & Remediation Services; Arts, Entertainment, & Recreation; Accommodation & Food Services; and Other Services.

Only a few of the county’s largest private sector employers are in Odessa/Lutz. Fanatics and Benefytt Technologies are in the Financial & Professional Services sector. The subregion’s only hospital – St. Joseph’s Hospital – North – is also a major employer.

Table 9: **ODESSA/LUTZ MAJOR EMPLOYERS**

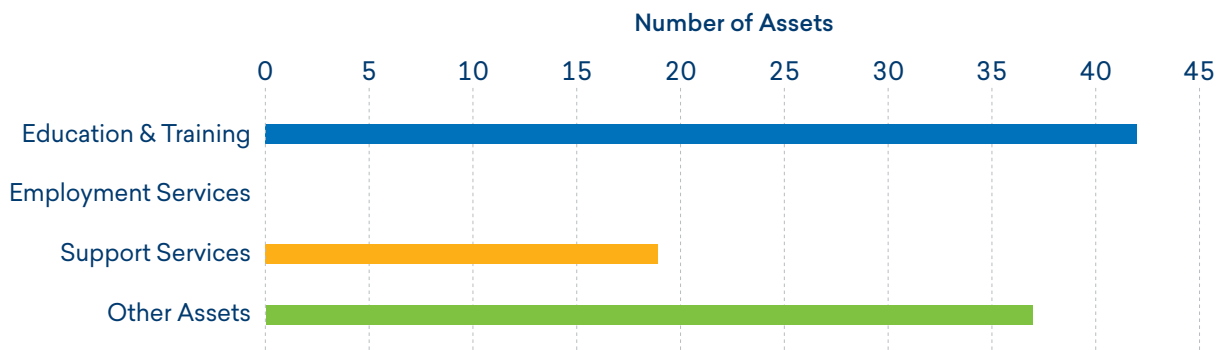
Company Name	Industry
Fanatics	Financial & Professional Services
Benefytt Technologies, Inc.	Financial & Professional Services
St Joseph’s Hospital - North	Healthcare

Source: Tampa Bay EDC & Tampa Bay Business Journal



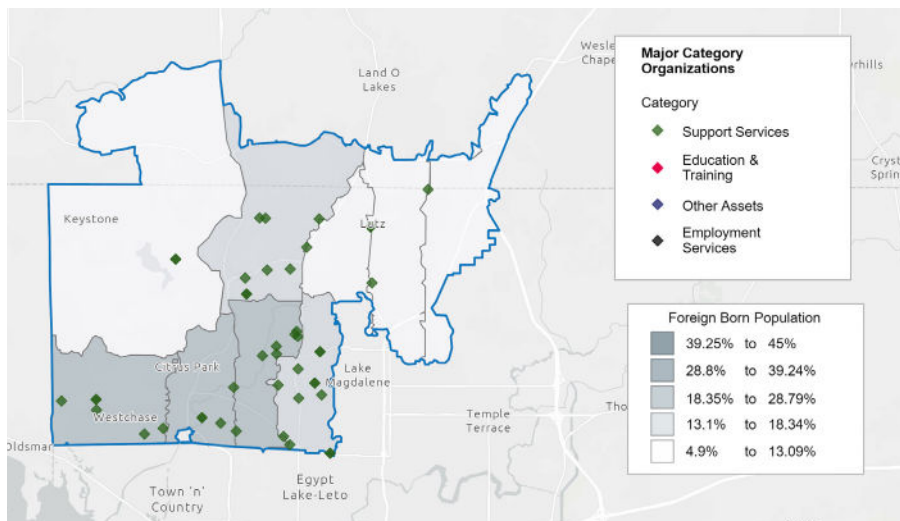
As the third largest subregion in terms of population, Odessa/Lutz also has 89 assets – fewer than Westshore/Citrus Park/Town & Country which is smaller in size. However, Odessa/Lutz is less in need of some services due to it having the lowest poverty rate among subregions at 4.6%. It also has the second-highest education attainment among subregions.

Figure 39: **ODESSA/LUTZ ASSETS BY CATEGORY**



Source: Emsi Burning Glass

Figure 40: **MAP OF ODESSA/LUTZ ASSETS BY CATEGORY**



Source: Emsi Burning Glass



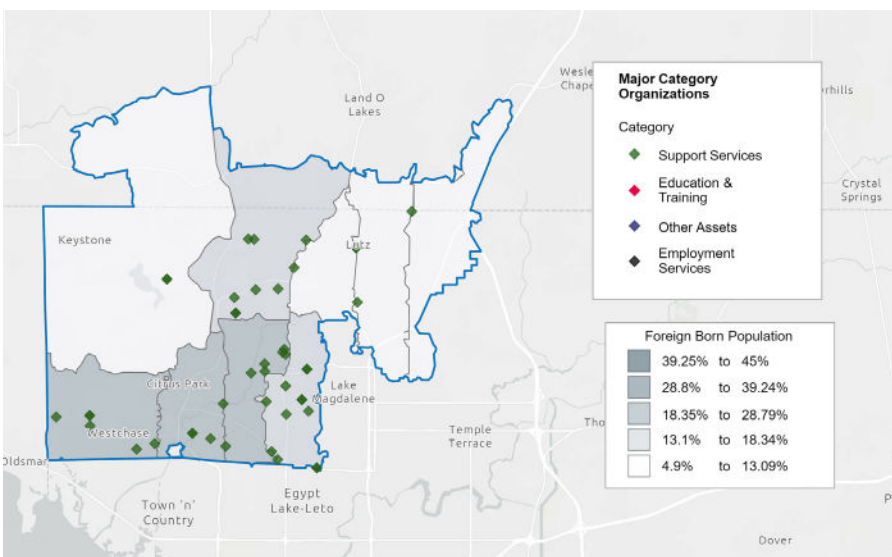
Table 10: ODESSA/LUTZ EDUCATION & TRAINING ASSETS BY SUBCATEGORY (NON-K-12)

Education & Training Assets	Number of Assets
Basic Skills Training	0
Asset Building & Financial Literacy	0
Vocational Education & Training	5
GED assistance	4

Source: Emsi Burning Glass

One area in the subregion may require attention. ZIP 33625 experiences the most poverty in the subregion, with a poverty rate of 8.1%. This poverty rate is much lower than other areas of Hillsborough County. ZIP 33625 also has a high immigrant population: 22.5% of residents in the ZIP code are foreign-born. This brings the average for the subregion up to 16.1% - third in the county. Yet, if we look at Support Services assets in the ZIP code, only three are present: two childcare centers and a children’s home. The entire region lacks language support services, and there is not a single adult school in Odessa/Lutz.

Figure 41: MAP OF ODESSA/LUTZ SUPPORT SERVICES



Source: Emsi Burning Glass

Key Recommendations

- With slower growth, a wealthier population, and high education attainment, Odessa/Lutz experiences less demand than other subregions. However:
- Bring a language support asset to the subregion. Odessa/Lutz has a high immigrant population but lacks language support services.
- Explore the need for an adult school, which is currently not present in the subregion. Adult schools typically offer ESOL, so it could also offer language support services as well.

South County – Gibsonton/Ruskin

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
143,649	9.6%	67	0	0.47

As the fifth-largest subregion with a population of 143,649, South County – Gibsonton/Ruskin is also the fastest growing. Between 2015 and 2020, the subregion grew 22.8%, adding over 26,000 people. The subregion’s largest industry sector is Government, followed by Transportation & Warehousing. South County – Gibsonton/Ruskin has industry concentrations in Utilities; Transportation & Warehousing; and Real Estate & Rental & Leasing. Its largest private sector employers are Amazon, HCA South Bay Hospital, CMW, and Advanced Airfoil Components.

Table 11: SOUTH COUNTY - GIBSONTON/RUSKIN MAJOR EMPLOYERS

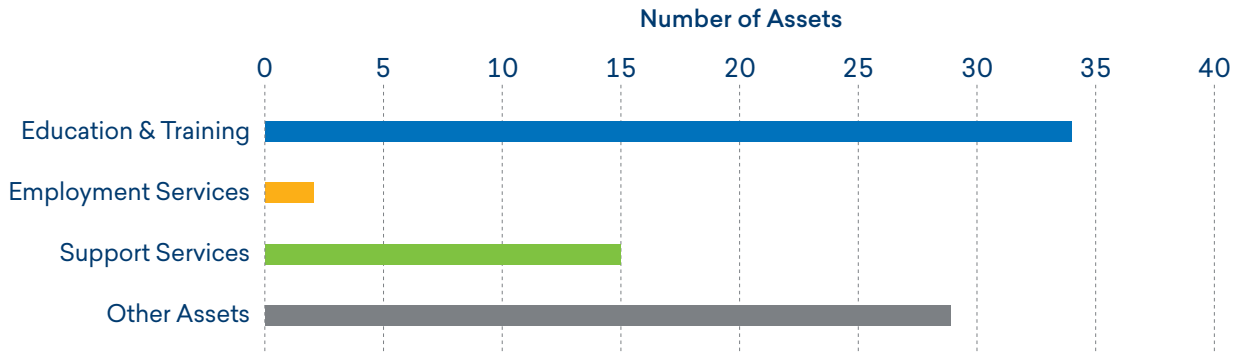
Company Name	Industry
Amazon	Distribution & Logistics
HCA South Bay Hospital	Healthcare
Central Maintenance & Welding (CMW)	Manufacturing
Advanced Airfoil Components LLC	Manufacturing

Source: Tampa Bay EDC & Tampa Bay Business Journal

With 67 assets, it has an asset per capita ratio of 0.47 – ahead of both Brandon/Riverview and New Tampa/Pebble Creek. However, with such a rapid pace of growth, this ratio could drop quickly if extra resources are not added to keep pace.

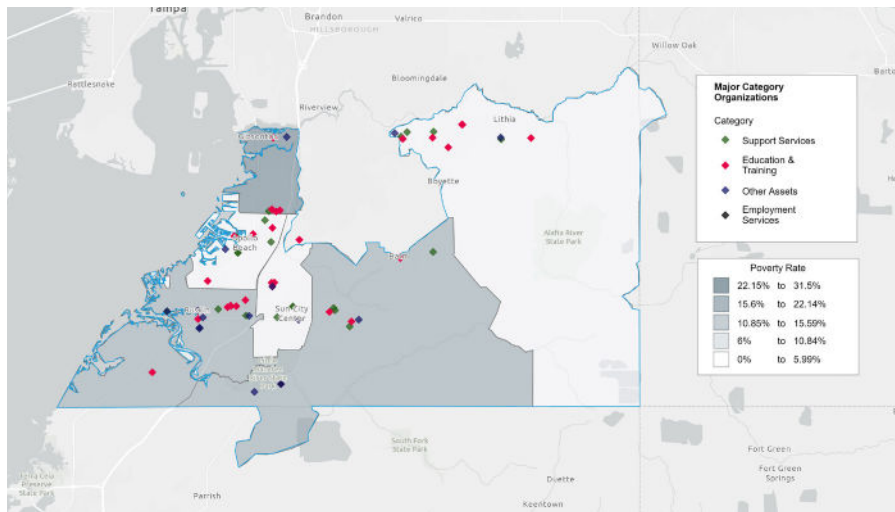
The subregion has two assets offering Employment Services: the CareerSource Tampa Bay – Ruskin office in ZIP 33570, and Enterprising Latinas which provides workforce & entrepreneurship trainings located in ZIP 33598.

Figure 42: SOUTH COUNTY - GIBSONTON/RUSKIN ASSETS BY CATEGORY

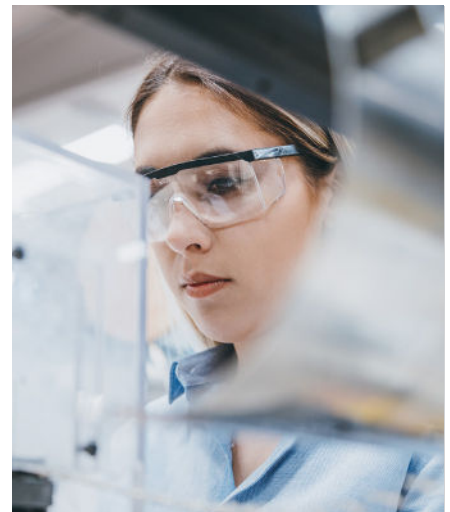


Source: Emsi Burning Glass

Figure 43: MAP OF SOUTH COUNTY - GIBSONTON/RUSKIN ASSETS BY CATEGORY

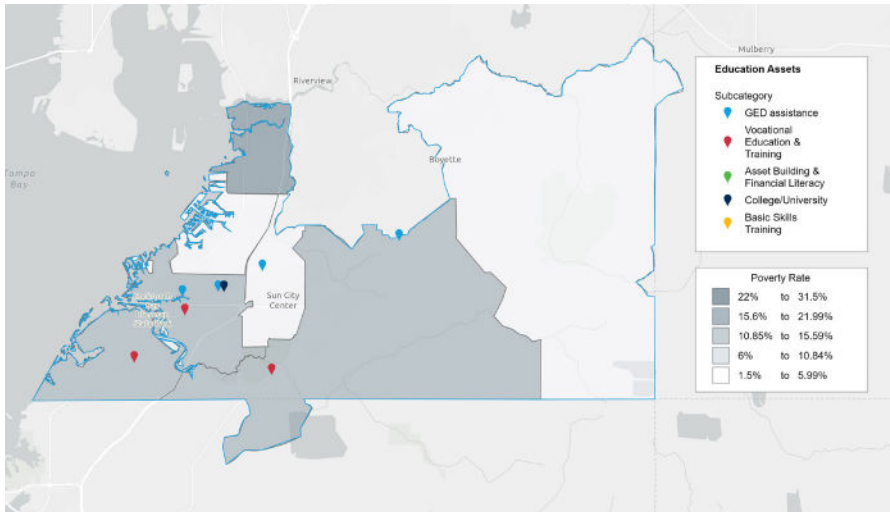


Source: Emsi Burning Glass

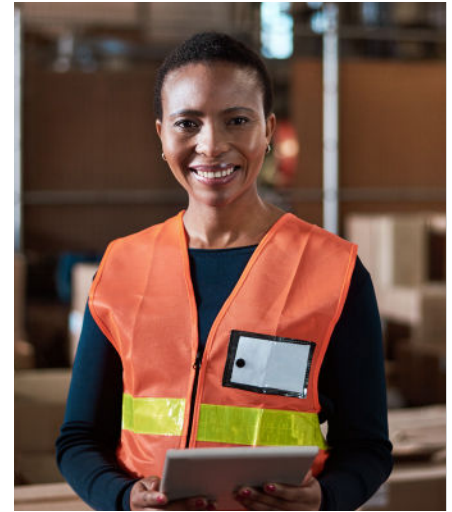


Regarding Education & Training, the subregion has seven non-university or K-12 assets that provide asset building & financial literacy services, GED assistance, and vocational education & training. As demonstrated by the map, most of these assets are within the Ruskin area (ZIP 33570). This ZIP code has the second highest poverty rate of 15.2% and is also the most populated of the subregion, meaning the assets are well-placed. Hillsborough Community College’s South Shore Campus is also located here. However, the ZIP code with the highest poverty rate of the subregion (33534) does not have any such assets and lacks Employment Services.

Figure 44: **MAP OF SOUTH COUNTY - GIBSONTON/ RUSKIN EDUCATION ASSETS (NON-K-12)**



Source: Emsi Burning Glass



The South County – Gibsonton/Ruskin subregion is the oldest in Hillsborough County. It also has the highest rate of veterans as a percentage of its population (12.1%) and experiences the third highest disability rate at 12.3%. With this combination of factors, disability assistance, senior services, and veteran & military services should be in higher demand. Yet, there are no assets offering senior services in the subregion.

There are also low numbers of veteran and disability assistance assets in South County – Gibsonton/Ruskin. There are three applicable assets:

- CareerSource Tampa Bay – offering disability assistance and veteran & military services
- My Warrior’s Place – offering veteran & military services
- Hillsborough County Southshore Regional Service Center – offering veteran services

There are no VA clinics in the subregion. Veterans seeking care rely on the South Hillsborough VA Clinic which, despite being in the Brandon/ Riverview subregion, is in a central location for veterans in the South County – Gibsonton/Ruskin subregion to access.

Key Recommendations

- Deepen relationships between CSTB Ruskin office and anchor employers in the subregion such as Amazon, CMW, Advanced Airfoil Components, and HCA South Bay Hospital to advance WIOA on-the-job training.
- Align vocational education & training with area industry, such distribution.
- Address the gap in Employment Services and Education & Training (non-K-12) for Gibsonton area (ZIP 33534).
- Expand disability assistance – Sun City Center and Wimauma have the highest percentage of persons with disabilities among any ZIP code in the county, yet the only asset in the subregion offering disability assistance is the CSTB Ruskin location. Explore with Vocational Rehabilitation if an additional location is needed in the area.
- Gather intelligence on newcomers to the subregion. As this is the fastest growing subregion, CSTB will need to be attentive to the changing needs of its residents. Who is driving the growth of the region? Are there any unique service demands associated with these newcomers? (For instance, if newcomers are mostly retirees, expect increasing demand for senior services).

New Tampa/Pebble Creek

2020 Population:	Poverty Rate:	Number of Assets:	Number of Assets within Opportunity Zones:	Assets per 1,000 People:
84,399	7.5%	34	0	0.40

New Tampa/Pebble Creek is the least populated subregion with just 84,399 people, although it boasts the second-highest growth rate. Between 2015 and 2020, the subregion grew 17.0%. As the smallest subregion, New Tampa/Pebble Creek also has the fewest assets and lowest assets per capita ratio.

New Tampa/Pebble Creek's largest industry is Finance & Insurance. Several of the county's largest employers are located here: MetLife, DTCC, Johnson & Johnson, Syniverse Technologies, and Bausch & Lomb. These organizations tend to hire highly skilled employees given the skills involved in finance, IT, and life sciences. The subregion also has industry concentrations in Retail; Information; Finance & Insurance; Real Estate & Rental & Leasing; Professional, Scientific, & Technical Services; Arts, Entertainment, & Recreation; and Other Services.



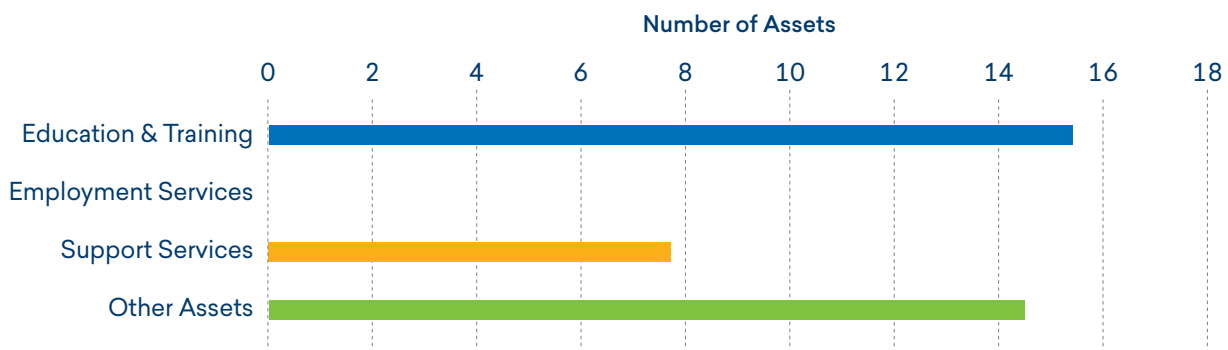
Table 12: NEW TAMPA/PEBBLE CREEK MAJOR EMPLOYERS

Company Name	Industry
MetLife	Financial & Professional Services
DTCC	Financial & Professional Services
Johnson & Johnson	Financial & Professional Services
Syniverse Technologies	Information Technology
Bausch & Lomb Incorporated	Life Sciences

Source: Tampa Bay EDC & Tampa Bay Business Journal

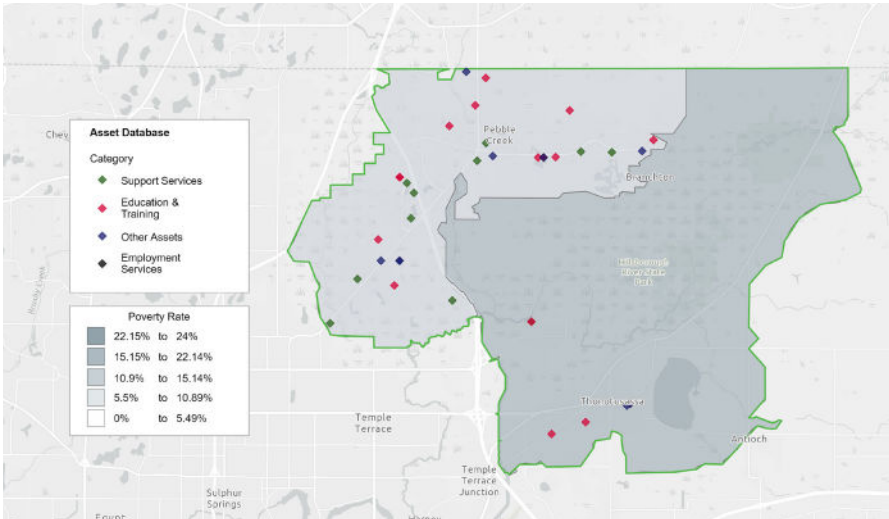
The subregion has the highest education attainment among its peers, with the lowest rates of people with no high school diploma. Consequently, New Tampa/ Pebble Creek has a relatively low poverty rate of 7.5%, in line with Brandon/ Riverview but noticeably above Odessa/Lutz. The subregion also has the highest percentage of Asians as a share of its population, the second-lowest veteran rate, and the lowest rate of individuals with an identified disability.

Figure 45: NEW TAMPA/PEBBLE CREEK ASSETS BY CATEGORY



Source: Emsi Burning Glass

Figure 46: MAP OF NEW TAMPA/PEBBLE CREEK ASSETS BY CATEGORY



Source: Emsi Burning Glass

New Tampa/Pebble Creek does not possess Employment Services assets and most of its Education & Training assets are public schools. Much of its Support Services are childcare centers.

Although New Tampa/Pebble Creek has the second-highest foreign-born population as a percentage of its total population, the subregion lacks language support assets. It does not possess an adult school or technical college which are typically the institutions which administer ESOL courses. This could be due to lack of demand since the subregion has the lowest rate of people without a high school diploma. Still, it would be worth exploring the socio-economic status of the immigrant population in New Tampa/Pebble Creek. Are they educated with English-language proficiency, or is this subregion underserved?

Key Recommendations

New Tampa/Pebble Creek has low veteran, low disability, low poverty, high education attainment rates. However, there are possible improvements:

- Gauge the need for Employment Services in the subregion. Given the smaller population and low unemployment rate of the subregion, it may be difficult to justify an additional physical location. Perhaps CSTB could extend remote Employment Services via the library system as a soft footprint approach.
- Despite having the second highest rate of foreign-born individuals as a share of its population, there are no language support assets in New Tampa/Pebble Creek. Explore the socio-economic status of the immigrant population in this subregion to determine if language support services are under addressed (the subregion lacks an adult school which could provide ESOL courses).

RECOMMENDATIONS

Based on our demographic analysis of Hillsborough County and our assessment of workforce assets identified in each subregion, Emsi Burning Glass has noted potential misalignments that, if investigated further and addressed, could help better serve the county's population. We recommend the following:

- Educate and Train Employers about Hidden Workers
- Monitor High-Growth Areas for Changes in Asset Demand
- Align Language Support Assets with High Migrant/Immigrant Populations
- Address Disability Service Gaps
- Extend Employment Services to Cover the Entire County and Opportunity Zones
- Bring Special Focus to North Tampa
- Utilize Senior Centers for Assisting Elderly Workforce Entry



Educate and Train Employers about Hidden Workers

The country has more jobs than there are people. Simply put, if companies want to achieve growth, they can't afford to leave a sizeable pool of human capital on the sidelines. Given the challenging labor market, CareerSource Tampa Bay has one of the most critical roles in supporting the area economy: activating "hidden workers."⁹ "Hidden workers" are those that are unemployed, absent from the workforce entirely, or seeking full-time employment while only managing to achieve part-time employment. They sit on the sidelines due to the convergence of personal circumstances, external misconceptions, and inflexible HR practices which constrain the pool of talent. This being considered, Hillsborough County has key hidden worker populations that can contribute to the workforce:

- Persons with Disabilities – Although lower than state and national averages, these persons account for 11.6% of population.
- Seniors (65+) – 11.1% of seniors are living in poverty compared to a

⁹ Harvard Business School and Accenture, "Hidden Workers: Untapped Talent," <https://www.hbs.edu/managing-the-future-of-work/Documents/research/hiddenworkers09032021.pdf>

national average of 9.3%. Seniors experiencing poverty may be both willing and able to fill in labor force gaps, especially for low-skilled and part-time roles.

- Veterans – 8.4% of the county’s population has veteran status, compared to just 7.3% nationally.
- Immigrants – Foreign-born residents account for 17.6% of the Hillsborough County population compared to just 13.6% nationally. Furthermore, immigrants typically work jobs which are in high demand but for which there is an inadequate supply of native talent.

CSTB should leverage its position as a business service provider to become labor force advocates: Stress the importance of tapping into the Hidden Workforce as an act of *pragmatic necessity* which empowers all workers by connecting talent to opportunity. Help businesses address labor force challenges by helping them reframe their approach to hiring: from degrees and experience towards skills, potential, and motivation.

One pragmatic example: help employers create specialized applicant pipelines for hidden workers, separate from rigid Applicant Tracking Systems (ATS). ATS is efficient but can often exclude viable candidates by placing multiple Go/No-Go barriers in place even when not critical to the job description.

 **Monitor High-Growth Areas for Changes in Asset Demand**

High-growth areas need to anticipate changing workforce demand. The pace of demographic growth is certainly a tailwind for the area economy and testament to the attractiveness of the region, but such growth is also bound to tax the system’s resources. With more people, there is also a greater demand for services and resources. CareerSource Tampa Bay and regional partners should consider *who* these newcomers are and what their service needs will be to anticipate what areas will experience increases in service demand. For instance, South County – Gibsonton/Ruskin is experiencing growth at breakneck speeds. Pay special attention to this area. Consider partnering with organizations to fund and execute an annual new resident survey to supplement the Census Bureau’s American Housing Survey (AHS).

 **Align Language Support Assets with High Migrant/Immigrant Populations**

Hillsborough County’s high migrant and immigrant populations mean there are many English language learners, as well as people without GEDs or high school diplomas. There seems to be too few assets for migrant workers and non-English language speakers given the large immigrant population of the county. Focus on delivering language support services closer to where they are. For instance:

*CSTB should leverage its position as a business service provider to become labor force advocates: Stress to employers the importance of tapping into the Hidden Workforce as an act of **pragmatic necessity**.*

- Concentrate on providing language support services to the Westshore/ Citrus Park/ Town & Country subregion, especially ZIP 33634 (the area between Town & Country and Pinecrest West Park). This area has the highest number and percentage of foreign-born residents in the subregion, which likely means the most non-English speakers. Consider engaging the public library system to help deliver language support programs where adult school ESOL programs are unavailable or fall short.
- Explore the socio-economic status of the immigrant population in New Tampa/Pebble Creek. This subregion has an elevated foreign-born population, but it lacks an adult school which are typically vehicles for ESOL programs. Are they educated beyond a high school level with English-language proficiency, or is this subregion underserved?
- Increase language support for the ZIP 33625 (Carrollwood) area in Odessa/Lutz. The subregion is 3rd in immigrant population share but has no assets to serve them. Like New Tampa/Pebble Creek, it lacks an adult school which may be due to lack of demand due to its high education attainment rate.
- The Plant City subregion has a large migrant population due to the need for field workers to support this heavily agricultural area. Ensure proper language support, education, and immigration services for this community. Connect migrant workers with local skills-similar jobs with anchor employers such as in distribution to ensure continuity of employment.
 - Star Distribution Systems – distribution center/warehouse environment
 - Gordon Food Service – distribution center/warehouse environment
 - C&S/Winn-Dixie – distribution center/warehouse environment



Address Disability Service Gaps

Disability assistance is too concentrated and completely absent from 2 of 7 subregions in Hillsborough County. Disability services seem somewhat misaligned within Downtown/City of Tampa: ZIPs 33612 (North Tampa) and 33605 (Ybor City) don't have the highest concentration of assets despite having the highest concentration of persons with disabilities in the subregion. Sun City Center and Wimauma in the South County – Gibsonton/Ruskin subregion have the highest percentage of persons with disabilities among any ZIP code, yet the only asset in the subregion offering disability assistance is the CSTB Ruskin

location. Explore ways to expand disability assistance for the residents of Sun City Center and Wimauma.

Connect with the Agency for Persons with Disabilities (APD). One of its three main goals is to “increase the number of individuals with developmental disabilities in the workforce.” The Florida legislature appropriated \$1 million for FY 2021/2022 to provide support employment services for individuals on the APD waiting list who would like to work. Proactively work with APD to bring training and employers to this waiting list. Consider using CSTB locations to reach people closer to high disability populations, thereby extending APD’s geographic reach.¹⁰



Extend Employment Services to Cover the Entire County and Opportunity Zones

Two subregions have no assets for Employment Services, reflecting a gap in services by area. Employment Services are almost entirely focused within the Downtown/City of Tampa subregion. It has over 80% of the Employment Services assets in the County, despite accounting for just 33% of the population. This is where Hillsborough County experiences the highest percentage of the population living in poverty and therefore requires more resources to help.

Still, the Gibsonton area (ZIP 33534) experiences the highest poverty rate of its subregion (and has one of the higher poverty rates in the county), but it doesn’t have Employment Services or non-K12 Education & Training.

Only 33% of assets offering Employment Services lie within Opportunity Zones even though they tend to be concentrated in the Downtown/City of Tampa subregion. Still, among these assets within Opportunity Zones, many focus on entrepreneurial or small business development rather than services for typical job seekers. Seek to realign more Employment Services within Opportunity Zones.



Bring Special Focus to North Tampa

The North Tampa area in ZIP 33612 (the area wedged between Lake Carroll in the West and the University of South Florida in the East) has the highest intensity of poverty, persons with disabilities, and people using public transportation for work. It also has many veterans overall (but not as percentage of its population).

Personal care & service occupations are concentrated here, but these occupations were negatively affected by the pandemic – leaving many already low-income individuals dealing with the fallout. Focus on healthcare career pathways for North Tampa residents experiencing poverty – the proximity to major healthcare providers could marry job opportunity with proximity, thus shorter public transportation commute times.

10 Agency for Persons with Disabilities, <https://apd.myflorida.com/customers/supported-employment/>

Though childcare seems well distributed across subregions, North Tampa may need more to enable area workers more flexibility at work.

Given the socio-economic position of many residents here, the neighborhoods experiencing poverty in this ZIP code need to be considered a priority area for workforce development.



Utilize Senior Centers for Assisting Elderly Workforce Entry

Senior center programming is available for those aged 50+, a full 17 years before retirement age. This means senior centers are a possible location for identifying:

- Early retirees who may be willing to re-enter the workforce
- Non-retired seniors who experience unemployment or underemployment

These senior centers have computer labs and internet access as well as classroom/event space, so the infrastructure is in place for basic skills training for workforce entry. Partner with senior centers to bring senior workforce re-entry training to senior populations. Identify employers that would be willing to create specialized senior training and recruitment programs to bolster their workforce.

Target senior centers closest to areas with high senior poverty rates first – these seniors may be more willing to enter the workforce out of economic necessity. Partner with the library system or the adult school system to extend reach where senior centers fall short. Silver Tree Senior Dining & Activity Center, Mary Walker Senior Dining & Activity Center, and King’s Manor Senior Dining & Activity Center are all located within Opportunity Zones.

Note that there are no senior centers in the Plant City or New Tampa/Pebble Creek subregions. Raise this with Hillsborough County to explore if there would be enough demand for service expansion to these subregions.



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