

2009 Tampa Bay Partnership Annual Report to the Community

EVOLUTION OF LEADERSHIP

15 Years of Moving Forward



Steve Mason
President & CEO
BayCare Health
System
2008-09 Chair

MODEL FOR PROSPERITY

In tough times, true leaders are the ones who step up and keep the focus on what is important and what will make a difference long term. This has been a challenging year for all of us, but by rallying the leadership of our region, we have continued to move forward in measurable ways toward a future that has productive, inclusive and sustainable growth with prosperity for all.

The outcomes of our future growth requires that we strategically invest in the institutions, people and programs that produce these outcomes. As you will see in the pages of this annual report, the Partnership continues to be a driving force through our Model for Prosperity which focuses on four key initiatives:

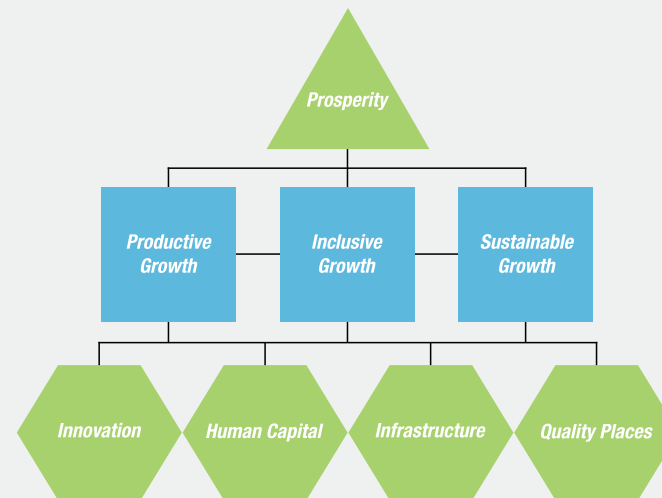
- A Vision for Regional Prosperity
- A Blueprint for Economic Development
- A Transportation Strategy to Support Regional Transit
- A Broader Advocacy and Leadership Model

We continue to make progress on a regional livable communities vision and have begun work to institute *ONE BAY: Healthy Communities* and *ONE BAY: Lifelong Learning* visioning programs. We are moving forward on a Blueprint for Economic Development to identify and target the industry clusters and workforce of the future. Our efforts for regional transit are gaining momentum with a coalition and referendum in Hillsborough County. And we continue to build legislative clout by developing relationships and support around critical regional economic development issues.

It has been an honor to serve as Chair of the Tampa Bay Partnership this past year. On behalf of the Partnership, I'd like to take this opportunity to thank all the business and community leaders who have generously given of their time, talent and resources to keep the mission of this organization moving forward. With continued leadership and vision, we will achieve the opportunity for ongoing prosperity for our entire region.

Sincerely,

Steve Mason
2008-09 Chair



Adapted from the Brookings Institution Blueprint for American Prosperity

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EVOLUTION OF LEADERSHIP

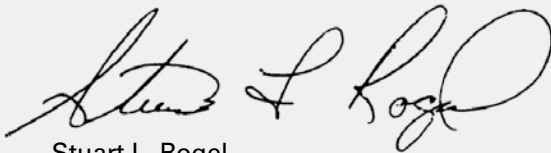
This year, the Tampa Bay Partnership surpassed another milestone anniversary. As you can see from the timeline of accomplishments illustrated throughout this annual report, the common denominator across our 15 years as an organization is effective and visionary leadership.

The real power of the Partnership is the bringing together of the region's most influential business leaders with the resources, capacity and passion for ensuring this region reaches its full potential. The focus on leadership development and growth in all the communities of Tampa Bay is critical as we take these next steps into a Model for Prosperity. We urge you to be a part of this effort.

Our future prosperity depends upon our leadership's ability to continue to evolve and provide the vision and focus necessary to enable our region to innovate and compete in new markets and industries. As an organization, we must continue to engage new leaders and collaborative efforts to successfully address the growing challenges before us and create a true Model for Prosperity.

I offer a very special thank you to our Chair, Steve Mason, whose leadership has helped this organization move measurably forward. Finally, thank you to all the investors and leaders who provide their time, energy and resources to our efforts. Together, we are transforming our region through the evolution of leadership.

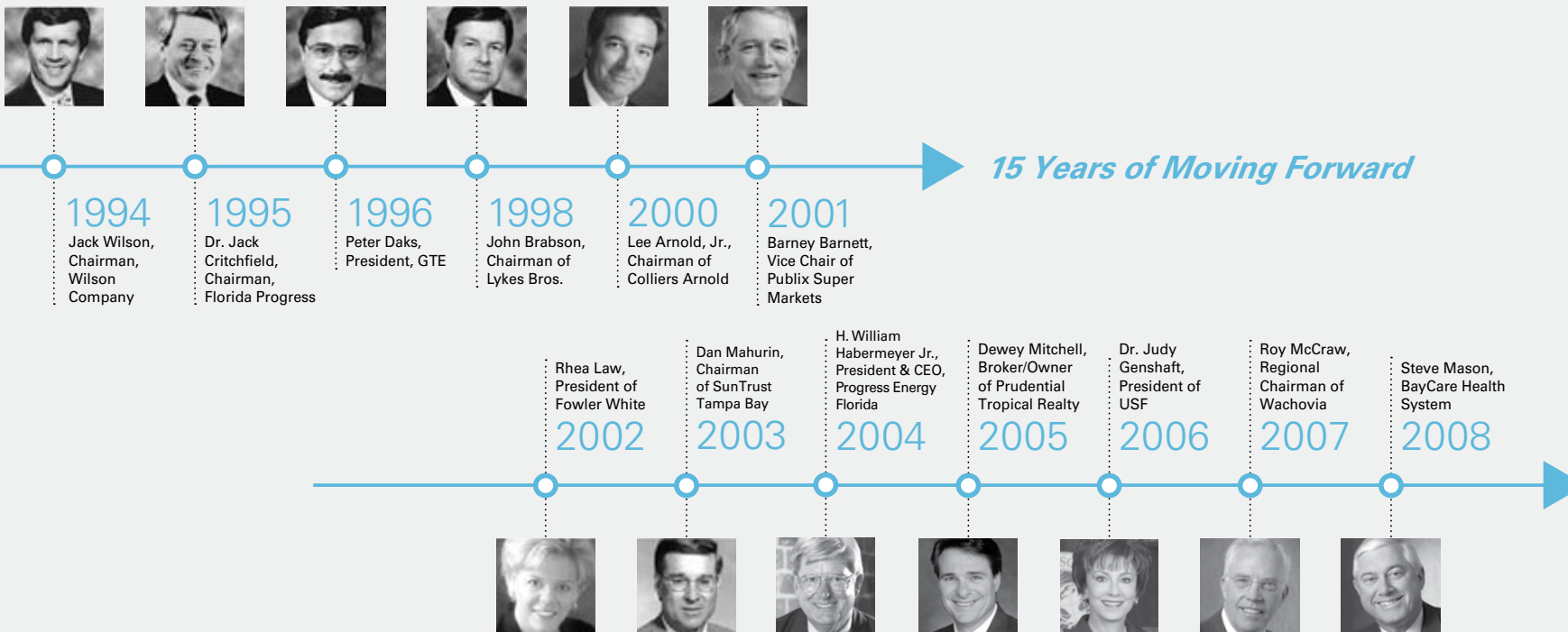
Sincerely,



Stuart L. Rogel
President & CEO



Stuart L. Rogel
President & CEO
Tampa Bay
Partnership



The common denominator across our 15 years as an organization is effective and visionary leadership.

2009 COMBINED FINANCIAL SUMMARY

COMBINED STATEMENT OF FINANCIAL POSITION AT SEPTEMBER 30, 2009

ASSETS	Cash and cash equivalents	\$1,057,029
	Contributions receivable, net	2,190,100
	Sponsorship and grants receivable	15,067
	Other current assets	14,400
	TOTAL CURRENT ASSETS	3,276,596
	Property & equipment, net of accumulated depreciation	16,992
	TOTAL ASSETS	\$3,293,588
LIABILITIES	Accounts payable, accrued expenses, deferred revenue	\$347,848
	TOTAL CURRENT LIABILITIES	347,848
NET ASSETS	Unrestricted	
	Board designated, cash reserve	475,251
	Undesignated	265,322
	Total unrestricted	740,573
	Temporarily restricted	2,205,167
	TOTAL NET ASSETS	2,945,740
	TOTAL LIABILITIES & NET ASSETS	\$3,293,588

NOTES TO COMBINED FINANCIAL STATEMENTS:

The statement of combined financial position of Tampa Bay Partnership for Regional Economic Development, Inc. and Tampa Bay Partnership for Regional Research and Education Foundation, Inc. as of September 30, 2009, and the related statement of activities and changes in net assets and cash flows for the year ended were audited by Carr, Riggs & Ingram, LLC and an unqualified opinion was issued.

15 YEARS OF MOVING FORWARD



April 19, 1994 the Tampa Bay Partnership (TBP) becomes an independent organization.

Volunteers from the region's economic development groups come together to agree on the procedures for a regional marketing effort.

Jack Wilson, Chairman of Wilson Company, becomes the TBP Chair.

Stuart L. Rogel becomes the first Executive Director hired to lead new regional effort.

1994

2009 COMBINED FINANCIAL SUMMARY

COMBINED STATEMENT OF ACTIVITIES AT SEPTEMBER 30, 2009

REVENUE	Contributions	\$2,145,100
	Grants, in-kind contributions, sponsorships and investment income	446,657
	TOTAL REVENUE FROM OPERATIONS	2,591,757
OPERATING EXPENSES	Program activities	1,801,376
	Support activities	867,663
	TOTAL EXPENSES FROM OPERATIONS	2,669,039
	CHANGE IN NET ASSETS FROM OPERATIONS	(77,282)
NON-OPERATING EXPENSES	Change in estimate	(611,905)
	CHANGE IN NET ASSETS	(689,187)
	NET ASSETS, BEGINNING OF THE YEAR	3,634,927
	NET ASSETS, END OF YEAR	\$2,945,740

The condensed statements have been derived from the audited financial statements. Copies of the audit report and complete financial statements are available upon request. Send requests to Tampa Bay Partnership, Stuart Rogel, President, 4300 W. Cypress Street, Suite 250, Tampa, Florida 33607

15 YEARS OF
MOVING FORWARD



TBP targets major metro areas with direct missions including exclusive events in the Yankees' owner's box.



Polk County joins the TBP to become the 6th county in the regional effort.



Dr. Jack Critchfield, Chairman of Florida Progress, becomes TBP Chair.



TBP invests into advertising campaign placing over 33 full page ads in national publications.

1995

EXECUTIVE COMMITTEE

The Executive Committee is the fundamental leadership unit responsible for program management and fiscal governance. These volunteers rotate on an annual basis and provide energy and expertise to the complex issues of regional economic development.



Chair
Steve Mason
President & CEO
BayCare Health System



Vice Chair
Jeff Lyash
President & CEO
Progress Energy Florida



Secretary/Treasurer/
Business Intelligence
Gary Sasso
President & CEO
Carlton Fields



Immediate Past Chair/
Transportation Chair
Roy J. McCraw, Jr.
Regional
Chairman (retired)
Wachovia
Corporation



Foundation/ONE BAY
Chair
Daniel Mahurin
Chairman, President
& CEO
SunTrust Bank
Tampa Bay



ED Partners Council
Chair
Mike Meidel
Director, Pinellas
County Economic
Development



Council of Governors
Chair
John R. Schueler
President, Florida
Communications
Group



Past Chairs Council
Dr. Judy Genshaft
President
University of South
Florida



Public Policy &
Legislative Advocacy
Chair
Ron Pierce
Tampa Bay Lightning



Communications
Chair
JoAnn Urofsky
General Manager
WUSF Public
Broadcasting



President & CEO
Stuart Rogel
Tampa Bay
Partnership

15 YEARS OF MOVING FORWARD



USF and UCF come together with economic development to create the Florida High Tech Corridor Council.



TBP launches testimonial ad campaign featuring recently relocated companies.



TBP targets visiting media during Vice Presidential debate in St. Petersburg.



TBP convenes "Team Tampa Bay" hosting effort to woo Real Estate VIPs at NACORE Annual Convention.



Peter Daks, President of GTE, becomes TBP Chair.

1996

ECONOMIC DEVELOPMENT PARTNERS

The economic development professionals from throughout the region are the conduit through which regional programs and initiatives reach our communities.



The Tampa Bay Partnership represents the seven-county region on the west coast of Florida which encompasses 5,742 square miles, four million residents, and is the 13th largest media market in the U.S.

15 YEARS OF MOVING FORWARD



TBP launches national branding effort utilizing unifying icon – the Skyway Bridge.



Hernando County joins TBP – becoming the 7th county in regional effort.

www.tampabay.org

TBP launches first website to attract active seekers.



TBP successfully defends “Climate is Right” in legal challenge from the State of California.



TBP utilizes leadership in direct marketing effort to go peer-to-peer with relocation efforts.

1997

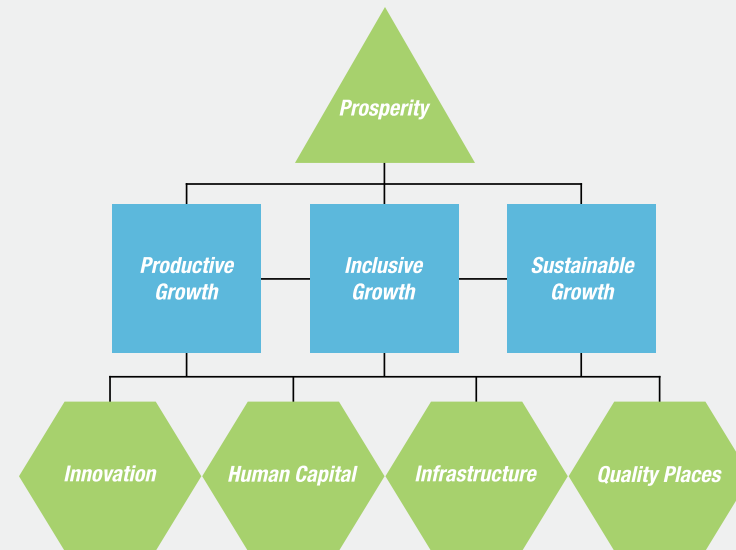
MODEL FOR PROSPERITY

Prosperity through productive, inclusive and sustainable growth is the desired outcome for Tampa Bay's future. The Tampa Bay Partnership believes that achieving this model for prosperity and growth requires our region to strategically invest in the institutions, people, and programs that produce those outcomes.

Our Model for Prosperity

The four drivers to this success include the focus areas of:

- **Innovation:** The ability to conceive and develop new products, new services, new technologies, new ways of organizing work, and new business models. Leading edge innovation is crucial to sustaining an economic advantage as well as generating and retaining high-quality jobs.
- **Human Capital:** Both educated and skilled labor drives innovation and is a prerequisite for income growth, upward mobility, and access to opportunity.
- **Infrastructure:** Ranging from energy, roads, transit, water and ports to telecommunications networks, our communities' infrastructure will determine how efficiently and rapidly goods, people, and information move within and across markets. These choices can also improve air quality, conserve land and natural resources, and reduce consumption of gas and electricity.
- **Quality Places:** Dense, distinctive cities and compact suburbs rich in amenities, transportation and housing choices are essential to attracting and retaining innovative firms and talented workers, and growing in environmentally sustainable ways.



Adapted from the Brookings Institution Blueprint for American Prosperity

15 YEARS OF MOVING FORWARD



TBP launches Phase II strategic plan – priorities include marketing, infrastructure and workforce.



Tampa Bay Devil Rays take to the field and put the region in the Major Leagues.



TBP hosts the Regional Water Accord – establishing Tampa Bay Water.



TBP launches campaign to attract world class talent.



Region and Corridor unite for Olympic effort.



John Brabson, Chairman of Lykes Bros., becomes Chair of Tampa Bay Partnership.

1998

A VISION FOR REGIONAL PROSPERITY



Building Upon ONE BAY Model

The ultimate goal of *ONE BAY: Healthy Communities* is optimal community health — a community where residents are healthy, safe, and have a high quality of life. The goal for *ONE BAY: Lifelong Learning* is a community where residents of Tampa Bay can be proud of their schools and recognize that a sense of community is tied to lifelong learning.

Both of these initiatives will develop a thorough understanding of the region's resources, advocates, institutions and coalitions to recognize and leverage areas of existing consensus, energy, and prioritization of issues. A Verizon Foundation grant was secured to be used as a challenge grant and seed funding toward the Education initiative.

When we set out to frame a long-term vision for the region, we knew it would take time and community support. Since 2007, the *ONE BAY: Livable Communities* initiative has reached out to more than 6,000 citizens across the seven-county region through a series of events to help define and express their vision for Tampa Bay's next 40 years.

In 2008, ONE BAY prepared **four distinct scenarios of potential-growth patterns** for the Tampa Bay region. These illustrations helped convey the cause/effect relationship of different land use patterns on transportation, the environment, water resources, and the location of jobs vs. housing.

In June 2009, ONE BAY commissioned Mason Dixon Polling to complete a survey of 1,100 adult residents of the seven-county Tampa Bay region. The survey revealed that residents soundly reject "business as usual" when it comes to future growth in the region. Residents support a scenario for future growth that focuses on protecting water resources, followed by one that emphasizes compact design along transportation corridors to preserve open space.

ONE BAY is compiling all these sources of citizen input toward creating a ONE BAY Vision and Recommendations for the region that better reflects the future citizens would like to see.

ONE BAY is a partnership of The Urban Land Institute, Tampa Bay Partnership Regional Research and Education Foundation, Vision21, Southwest Florida Water Management District, Tampa Bay Estuary Program and Tampa Bay Regional Planning Council. To learn more, visit www.myonebay.com.



Daniel Mahurin
Chairman, President, & CEO,
SunTrust Bank Tampa Bay
Chair, TBP Regional Research
& Education Foundation
Chair, ONE BAY

This year marked an effort to expand the ONE BAY model to address Healthy Communities and Lifelong Learning.

15 YEARS OF MOVING FORWARD



TBP assists with region's efforts to secure \$100 million funding for I-4 widening.

TBP launches in-market billboard campaign promoting regional assets.

Region gains national recognition via unpaid media efforts – Crain's NY touts TBP's "aggressive recruiting" efforts.

TBP solidifies international efforts hosting dignitaries including Mexico's Ambassador.

TBP hosts first ever regional leadership conference.

Advertising campaign launched to create awareness of companies and workers in Tampa Bay.

TBP packages Tampa Bay brand with fast facts on region's strengths.

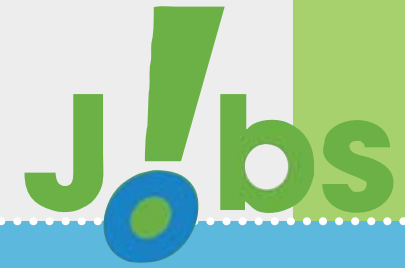
1999

A BLUEPRINT FOR ECONOMIC DEVELOPMENT

The Tampa Bay Partnership continues to invest in the efforts to brand the communities of Tampa Bay for business success. Super Bowl XLIII provided a tremendous opportunity for our region to take center stage and the Partnership leveraged this event by hosting technology leaders from throughout the country in our first ever Technology Leaders Roundtable during the festive weekend. This event along with other hosting efforts allowed us to nurture stronger relationships with industry leaders capable of creating investments and jobs in our region.

KEYS TO SUCCESS

- Achieved 91% of adjusted goal for new leads (21/23) surpassing last year's total by 8%.
 - 50% of "A" leads came from relationships with site selection consultants.
 - 20% of "A" leads were generated by participation in trade shows and summits.
 - 20% of "A" leads were local partner/investor referrals.
- Traveled to 12 domestic and international destinations participating in missions, meetings, summits and tradeshows.
- Hosted first-ever Global Technology Leaders Roundtable during Super Bowl weekend. CEOs from Draper, SRI, RTI, Genzyme and Raytheon served on an expert panel to discuss the future of technology and how it will affect innovation.



A REGIONAL BUSINESS PLAN:

The current economy continues to teeter on the question of "where are the jobs?" The Partnership is creating an action plan to generate these jobs through the creation of the Blueprint for Regional Economic Development. We've garnered a tremendous amount of pledged investment from our community economic development partners as well as the workforce boards in each community to partner with us on an in-depth study to generate a regional plan of action. The Partnership has applied for a grant from the Department of Commerce Economic Development Administration to leverage our investment in a plan projected to cost almost \$500,000. The study will be conducted in the first quarter of 2010 and the plan will be finalized by July 2010.

15 YEARS OF MOVING FORWARD



TBP commissions Hudson Study to identify regional workforce priorities.



Tampa Bay's Visiting International Professional Program established to host the State Departments visitors programs.



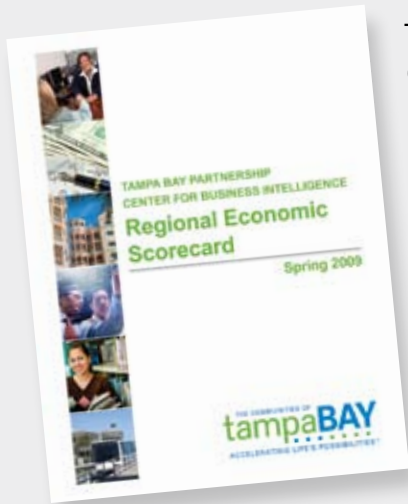
TBP creates process for setting regional transportation funding priorities.



Lee Arnold, Jr., Chairman of Colliers Arnold, becomes Chair of TBP.

2000

2009 TAMPA BAY REGIONAL ECONOMIC SCORECARD



The Regional Economic Scorecard continues to serve as a valuable unbiased assessment tool to measure not only the economic health of our region but also “how we’re doing” in economic performance against the comparison regions of Atlanta, Charlotte, Dallas, Jacksonville, and Raleigh-Durham.

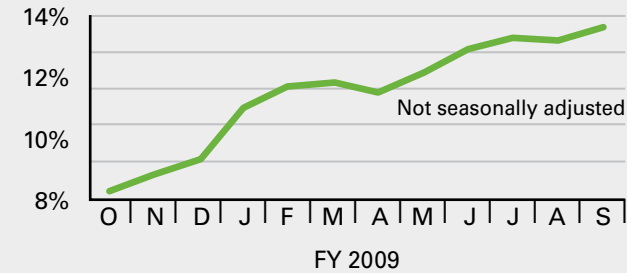
Through two Scorecards in FY 2009, the impact of the national recession can clearly be seen on Tampa Bay as well as our comparison regions. These scorecard results, which are only a snapshot of where our region has been, have reinforced the need to develop a Blueprint for Economic Development to identify the industry clusters and workforce needed for the future economic prosperity.



Gary Sasso
President & CEO
Carlton Fields
Business
Intelligence
Chair

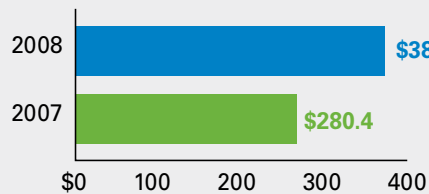
While Tampa Bay's unemployment rate rose higher than the State's, the region has retained 90 percent of its jobs and added over 2,500 new direct jobs from 2007 to 2008.

Unemployment Rate

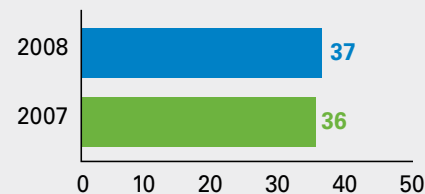


Economic development plays a key role in the growth and vitality of the region.

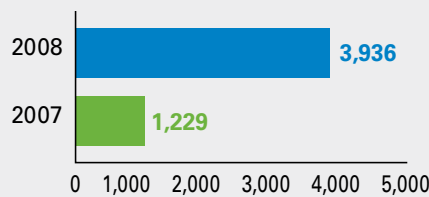
Capital Investments



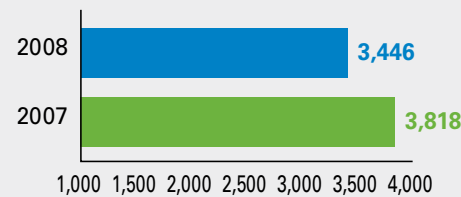
Total Projects (with state incentives)



New Direct Jobs

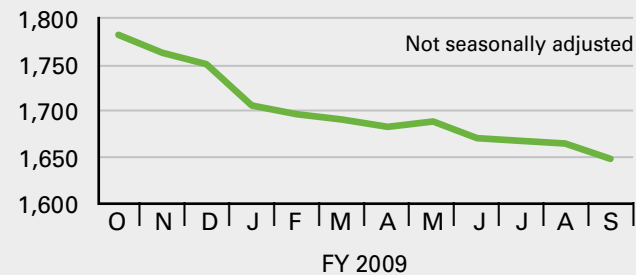


Jobs Retained



Source: Enterprise Florida, Inc.

Employment (in thousands)



Source: Bureau of Labor Statistics

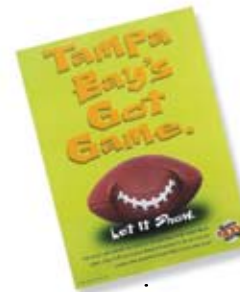
15 YEARS OF MOVING FORWARD



Manatee and Sarasota County come together to maximize Tampa Bay branding efforts.



Tampa Bay Technology Forum ignites the region's technology entrepreneurs.



Super Bowl XXXV shines the world's spotlight on Tampa Bay – TBP hosts tour for relocation consultants.



Barney Barnett, Vice Chair of Publix Super Markets, becomes Chair of TBP.

2001

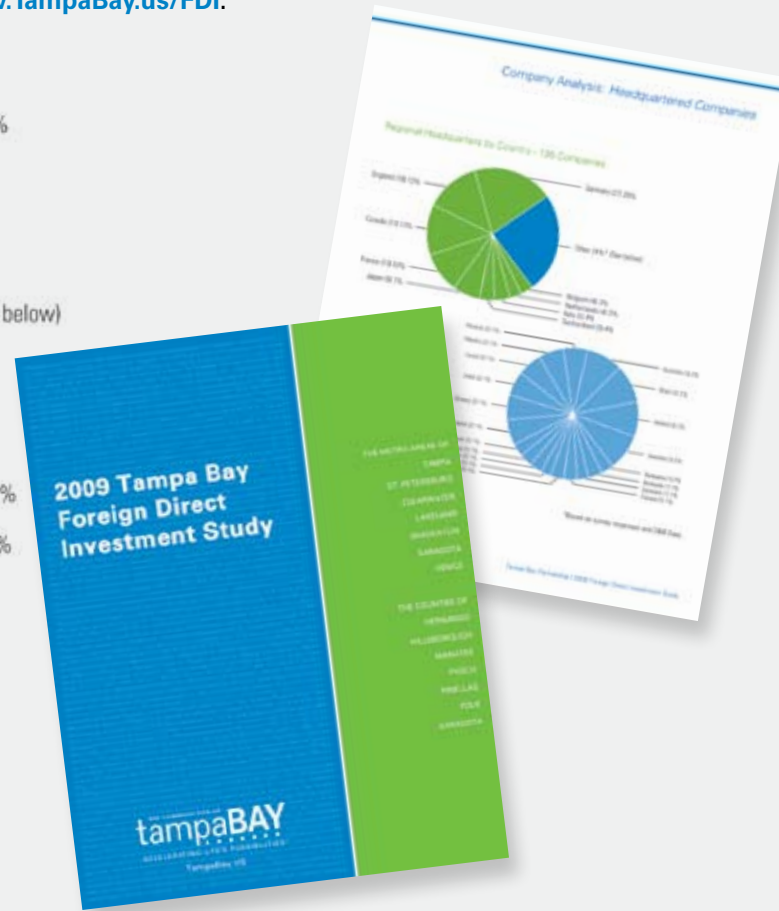
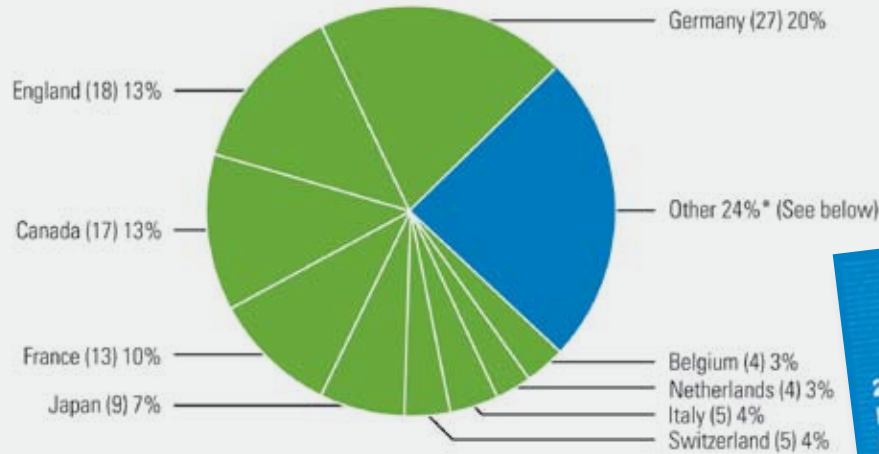
FOREIGN DIRECT INVESTMENT STUDY

International firms are finding that Tampa Bay is an ideal location for their U.S. headquarters or manufacturing facilities. The 2009 Tampa Bay Foreign Direct Investment Study, conducted by the Tampa Bay Partnership, identified 394 foreign owned companies from 34 nations, operating across 18 industries in the seven-county region. The 394 companies identified have 824 locations in our region, of which, 135 are U.S. headquarters operations. The 394 foreign owned companies identified in the study employ over 37,000 people in Tampa Bay and have sales of \$13.6 billion. Foreign owned firms with a presence in Tampa Bay include world class companies and industry leaders such as Cott Beverages, TRAK Microwave, Gerdau USA, BIC Graphics and CAE USA Inc. Read the report at www.TampaBay.us/FDI.



Bronson Thayer
Chair, World Trade
Center Tampa Bay
International Chair

Regional Headquarters by Country



15 YEARS OF MOVING FORWARD



Leadership focused "market makers" helps tout region's capabilities.



Partnership teams up with EFi for national awareness campaign.



Rhea Law, President of Fowler White, becomes Chair of TBP.



Partnership launches in-market awareness campaign.

2002

A TRANSPORTATION STRATEGY TO SUPPORT REGIONAL TRANSIT

Our future economic well-being requires that we make strategic investments now in key infrastructure if we are to remain competitive and attract the industries and jobs of the future. A state-of-the-art transportation system is critical to moving goods and workers quickly and efficiently within and between regions and providing the competitive climate for business operations.

The Partnership held a Regional Transportation Forum, numerous briefings, monthly task force meetings and distributed regular communications to excite and engage our investor base, as well as the region, on the potential for regional transit.



Less than two years after its formation by the Florida Legislature, the Tampa Bay Area Regional Transportation Authority (TBARTA) came together, looked beyond parochial jurisdictions and created a Regional Transportation Master Plan for our region. Adoption of the Master Plan was the first step. The Tampa Bay Partnership supports efforts to implement the TBARTA Master Plan and supports communities and entities that continue to work collaboratively with the region and TBARTA. Already, efforts to implement the plan have begun, most notably with a transit referendum effort in Hillsborough County. The Partnership continues to support efforts to secure local funding sources that will allow us to build the economy, community and region of the future.

The Partnership also successfully worked with state legislators to secure the ability for TBARTA's \$2 million in operating dollars to be used for several years thus allowing TBARTA to move toward the implementation phases of their newly adopted Master Plan.



Roy J. McCraw, Jr.
Transportation
Taskforce Chair

With adoption of the TBARTA Master Plan and development of the ONE BAY: Livable Communities vision, we are building a truly unified regional transportation and land use vision for Tampa Bay.



15 YEARS OF MOVING FORWARD



2003

TRANSPORTATION (CONTINUED)



HIGH SPEED RAIL

This year, the Tampa Bay region was presented with an unprecedented opportunity to move forward our goal for regional prosperity by advancing both the TBARTA Master Plan and bringing high speed rail to our region. The Tampa Bay Partnership pledged its support to the effort to secure federal funding to build the Florida High Speed Rail system. We believe the Florida application for High Speed Rail funds is extremely competitive and our state is well prepared to deliver one of the first true High Speed Rail projects in America. High speed rail connecting Tampa Bay to Florida's other economic engines is critical to maintain our global competitiveness. The Partnership supported the efforts of ConnectUs to build a statewide grassroots coalition in support of Florida's application for federal funding.

SUPER REGION AND SUNRAIL

Through our Super Region efforts, we have learned that the metro areas of our state all share the same core beliefs about our future and how our regions are stronger together. This is why the Tampa Bay Partnership pledged its support for the process that successfully brings commuter rail to Central Florida. From an economic point of view, we feel strongly that investing in projects such as SunRail is exactly what our government should be spending money on to re-ignite our economy.



TRANSPORTATION FUNDING

Investing in building and connecting our city centers through multi-modal options is a key economic development objective that is essential to offer the high quality-of-life that will attract and retain the talented workforce that our region needs. A core focus of the Partnership's transportation efforts involved working with local, state and federal elected officials to identify ongoing funding sources to support the development and operation of the transportation systems critical to our region and our state. We worked with the Federal Delegation to build relationships and support for transit through meetings in the region, a trip to Washington, DC, and ongoing communications with our federal elected officials.

Successfully retained TBARTA operating dollars while supporting efforts in the Super Region and the state to advance regional transit and high speed rail.

15 YEARS OF MOVING FORWARD



Health Care is identified as a regional economic development issue.



Tampa Bay Lightning take the Stanley Cup and region wins international recognition.



TBP revives regional presence in Tallahassee with Tampa Bay Days.



6th Regional Leadership Conference explores the region's priorities.



TBP celebrates 10 years of regional cooperation for economic development.



H. William Habermeyer, Jr., President & CEO of Progress Energy Florida, elected Chair of TBP.

2004

A BROADER ADVOCACY AND LEADERSHIP MODEL

PUBLIC POLICY & ADVOCACY

In order for us to adopt, engage and build sustainable regional prosperity, it is clear we need influence in local, state and federal policy decisions. The Partnership developed a state legislative agenda this year around our four economic drivers and successfully advanced the agenda by protecting funding for and accelerating the I-4 Crosstown Connector project; assisting Moffitt in securing an additional \$20 million to support their research; passing legislation that will allow the State of Florida to report and analyze more accurate employment statistics; securing the ability for TBARTA's operating dollars to be used for several years thus allowing TBARTA to move toward implementation phases of their newly adopted Master Plan; and supporting USF funding including funding for the Polytechnic campus.

The Bay Area Legislative Delegation (BALD), which makes up 25 percent of the state legislature, was a key factor in these successes. The Partnership worked with BALD leadership to hold two BALD meetings, a briefing on high speed rail and a successful Tallahassee Fly-In event.

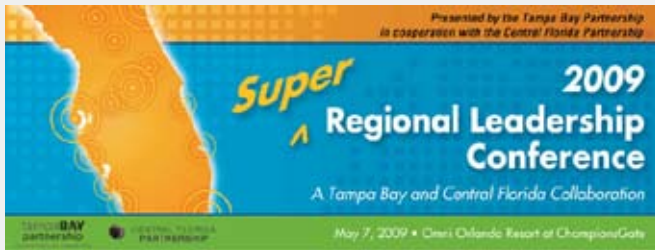
Beyond the region, the Partnership continues to work with key partners around the state to advance legislative priorities and build the network necessary for long-term legislative success.



Ron Pierce
Tampa Bay
Lightning
Public Policy &
Legislative
Advocacy Chair

LEADERSHIP DEVELOPMENT

Nearly 400 business and community leaders from Tampa Bay to Daytona Beach gathered in a historic "meeting of the minds." Led by the Tampa Bay Partnership in cooperation with the Central Florida Partnership, the 2009 Super Regional Leadership Conference explored the 13-county "super" region and its relationship to megaregions emerging across the country. "The Power in Coming Together" was evident in sessions designed to learn how our collective regions can best align to tackle



major issues, address the realities of the changing economic landscape, and emerge as stronger, more competitive and more prosperous regions. Work continues across Central Florida to build upon knowledge gained at the Super Regional Leadership Conference.



Celebrated
the 13-county
"super" region
and "the power
of coming
together."

The Partnership also held monthly Chair's Breakfasts and other briefings to provide investors with opportunities to learn about topical issues facing the region.

15 YEARS OF MOVING FORWARD



The Partnership launched the campaign "The Communities of Tampa Bay" targeting active seekers.

Vision21 launched.

Published first Regional Economic Scorecard.

Tampa Bay Regional Health Information Organization (RHIO) pilot project formed.

7th Regional Leadership Conference focused on regionalism and connections between communities.

Dewey Mitchell, Broker/Owner of Prudential Tropical Realty, elected Chair of TBP.

2005

A PROCESS FOR ENGAGEMENT

The Tampa Bay Partnership is actively engaging more executive leaders within investor organizations on regional issues and initiatives in order to add leadership capacity to the existing programs of the Partnership as well as reduce the attrition of participating companies. The program targets CEOs new to the market and senior-level management from our investor community. The 2009 Class involved 21 participants with representation from each county in the region.



2009



Eileen Coogan Boyle
President & CEO
Allegany Franciscan
Ministries



Colleen Burton
Executive Director
Polk Vision, Inc.



C. Graham Carothers
Partner
Shumaker, Loop &
Kendrick, LLP



Duane L. Chichester
President
Hernando Progress



Jack Cox
President
Half Acre Construction



Art Erickson
President
Florida Lifestyle
Communities, LLC



Maureen Freaney
Bureau Director, Health
& Human Services
Pinellas County



John Couris
COO, Morton Plant
North Bay Hospital
CEO Direct Co-Chair



Rod Irwin
Asst. City Manager
City of Clearwater



The Hon. Jack Mariano
2009 Chair, Commissioner,
District 5 - Pasco County
Board of Commissioners



Robert L. McCann, Jr.
Executive Vice President
The Nielsen Company



Thomas P. Moseley, Jr.
Pinellas County Area President
Whitney National Bank



Elias Nammour
Director, North America
Int'l Trade Operations
Citigroup



David Pizzo
Market President
BlueCross BlueShield
of Florida, Inc.



Selena Quick
Director of Community
Relations - W. Florida
AT&T



Marshall Goodman
Vice President &
Campus Executive
Officer, USF
Polytechnic
CEO Direct Co-Chair



Michelle A. Robinson
President
Southeast Region
Verizon



Gerald J. Seeber
General Manager
Tampa Bay Water



Julie Smith
VP External Affairs
Verizon



David Twiddy
Tampa Operations
Manager
Jacobs



Jim Vett
General Manager/VP
Vanguard Advanced
Pharmacy Systems



W. Mark Watson
Tampa Marketplace Leader
Deloitte



Travis S. Wellman
Vice President, Central/North
Florida Aggregates
Cemex USA

**Bigger.
Bolder.
Better.**



15 YEARS OF
MOVING FORWARD



this way
FORWARD



Bigger,
Bolder,
Better
strategic
focus.

Bay Area
Legislative
Delegation
formalized.

Tampa Bay
Partnership
takes active role
in advocating
for a Regional
Transportation
Authority.

Active Seeker
campaign
launched with new
Web site.

8th Regional
Leadership
Conference looks
at balance between
near-term objectives
and long-term
strategies.

First class of
CEO Direct
formed.

Dr. Judy
Genshaft,
President of
USF, elected
Chair of TBP.

2006

INVESTOR COMMUNITY

The companies and communities of Tampa Bay have come together to invest in regional economic development. Over 155 investors have taken responsibility for addressing the critical issues of a vision for regional prosperity, a blueprint for economic development, a transportation strategy to support regional transit, and a broader advocacy and leadership model.

COUNCIL OF GOVERNORS (\$50,000+)

BayCare Health System
 BlueCross BlueShield of Florida
 Bright House Networks
 City of Lakeland/Lakeland
 Economic Development Council
 City of Tampa
 Florida Communications Group
 H. Lee Moffitt Cancer Center
 & Research Institute

Hillsborough County Economic
 Development
 Humana
 Pasco Economic Development Council
 Pinellas County Economic Development
 Progress Energy Florida
 Publix Super Markets
 SunTrust Bank

Sykes Enterprises
 Syniverse Technologies
 Tampa Bay Business Journal
 Tampa Bay Rays
 Tampa General Hospital
 TECO Energy
 University of South Florida
 Verizon

BOARD OF DIRECTORS (\$25,000+)

All Children's Hospital
 AT&T
 BB&T
 Caponigro Public Relations
 Carlton Fields, P.A.
 Caspers Company
 Central Florida Development Council
 City of Clearwater
 Deloitte
 Economic Development Corporation
 of Sarasota County
 Manatee Economic Development Council/
 Manatee Chamber of Commerce
 Florida High Tech Corridor
 Fowler White Boggs, P.A.

Franklin Templeton
 Genesis Communications
 GrayRobinson, P.A.
 Greater Tampa Association of Realtors
 GTE Federal Credit Union
 Gulf Coast Community Foundation of Venice
 Hernando County
 Hillsborough County Public Schools
 Holland & Knight, LLP
 Innisbrook Resort & Golf Club
 Knight Foundation
 Kraft Construction
 Maddux Business Report
 Newland Communities
 OSI Restaurant Partners

PBS&J
 Prudential Tropical Realty
 Raymond James Financial
 Regions Bank
 Shumaker, Loop & Kendrick, LLP
 St. Petersburg Times
 Sweetbay Supermarket
 Tampa Bay Buccaneers
 Tampa Bay Lightning
 Tampa Hillsborough Economic
 Development Corporation
 The Duncan Companies
 UnitedHealthcare of Florida
 Wachovia Wells Fargo Foundation
 WUSF Public Broadcasting

To become part of our investment community, please contact David Boyd at dboyd@tampabay.org. *Investors as of October 31, 2009.*



15 YEARS OF
 MOVING FORWARD

Fla. Legislature creates Tampa Bay Area Regional Transportation Authority with unanimous support from BALD.

Reality Check event kicks off regional visioning effort.

SRI International locates in Tampa Bay.

Industry Intelligence Reports show regions strength in medical manufacturing, bio research, and pharma production.

ONE BAY regional visioning effort launched.

Roy McCraw, Regional Chairman of Wachovia, elected Chair of TBP.

2007

INVESTOR COMMUNITY

MARKET MAKERS (\$10,000+)

Amscot Financial
 Busch Entertainment Corporation
 City of St. Petersburg
 Coca-Cola Enterprises Bottling Companies
 Hernando Progress
 Jacobs
 Lindell Properties

Phelps Dunbar LLP
 R.R. Simmons Construction
 Saddlebrook Resort
 Shriners Hospitals for Children
 Sony Ericsson Women's Tennis Association
 Tampa Bay Workforce Alliance
 Tampa International Airport

Tampa Port Authority
 The Nielsen Company
 Valpak
 Whitney National Bank
 Williams Schifino Mangione & Steady P.A.
 Wilson Company
 World Trade Center of Tampa Bay

ADVISORS (\$5,000+)

Affiliated Engineers SE
 AMERIGROUP Community Care
 Associated Industries of Florida
 Bank of Florida
 Beck
 Bryant Miller Olive, P.A.
 Butler Pappas, LLP
 Citigroup
 Colliers Arnold
 Colony Beach & Tennis Club
 CRL Associates
 CSX Transportation
 Cushman & Wakefield
 Eckerd College
 Electric Supply Inc.
 Ferman Automotive Management
 Fifth Third Bank
 Greater Sarasota Chamber of Commerce

Hardee County
 Hardin Construction
 HDR Engineering
 Highwoods Properties
 Horizon Bay Retirement Living
 King Engineering Associates
 KPMG
 McKibbin Hotel Management
 Mosaic
 MWH
 New York Times Company
 North Highland Company
 Pepin Distributing
 Ports America Inc.
 Pulte Homes
 Reynolds, Smith & Hills
 SchenkelShultz Architecture
 Southern Strategy Group

Southwest Florida Water Management District
 Starkey Ranch
 Suffolk Construction
 Synovus Bank of Tampa Bay
 T. Rowe Price Services
 Tampa Bay Business Committee for the Arts
 Tampa Bay Technology Forum
 Tampa Bay Water
 Tampa Downtown Partnership
 Tampa Steel Erecting Company
 The Art Institute of Tampa
 Trammell Crow
 Trenam Kemker
 TRO Jung/Brannen
 Tucker/Hall
 United Way of Tampa Bay
 Westshore Alliance
 WilsonMiller

AMBASSADORS

Beall's
 Carr, Riggs & Ingram, LLC
 Central Florida Partnership
 Creative Contractors
 DeVry University
 Gregory, Sharer & Stuart

Junior Achievement
 London Baker Group
 Mahaffey Company
 Melitta North America
 Risser Oil

Rubin Development
 Ruth Eckerd Hall
 Sembler
 Tampa Bay Regional Planning Council
 University of Tampa

15 YEARS OF MOVING FORWARD



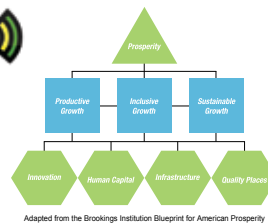
Secured \$2 million start-up funding for TBARTA.



Landed two high-profile Draper Laboratory projects in Tampa Bay.



ONE BAY Voicel! campaign gathers input from 3,400 residents on how we should grow.



Model for Prosperity strategic plan created.



Tampa Bay Rays American League Champions.



2008 Regional Leadership Conference "In My Lifetime" a call to action on critical regional issues.



Steve Mason, BayCare Health System, elected Chair of the TBP.

2008

LEADERSHIP NOW

Leadership Now is a call for those not at the table to join in managing the region's success. Below is recognition of the leaders who have stepped forward in fiscal 2008-2009 as new investors or existing investors who have increased their investment to help our region achieve its potential.

NEW COUNCIL OF GOVERNORS (\$50,000+)



NEW BOARD OF DIRECTORS (\$25,000+)



NEW MARKET MAKERS (\$10,000+)



NEW ADVISORS (\$5,000+)

Affiliated Engineers SE	SchenkelShultz Architecture	The Art Institute of Tampa Bay
Bank of Florida	Southern Strategy Group	TRO Jung/Brannen

15 YEARS OF MOVING FORWARD



Staged Global Technology Leaders Roundtable.

Tallahassee Fly-In draws record number of leaders in support of regional issues.

Traveled to 12 domestic and international destinations for business development.

Super Regional Leadership Conference with Orlando and Tampa Bay.

TBARTA adopts Regional Transportation Master Plan.

FDI Study shows Tampa Bay is an international business destination.

2009



The Tampa Bay Partnership is the regional organization that works with its partners to market the region nationally and internationally, to conduct regional research and to coordinate efforts to influence business and government issues that impact economic growth and development.

www.TampaBay.org

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Info@TampaBay.org

AN ENTERPRISEFLORIDA PARTNER

THE METRO AREAS OF TAMPA/ST PETERSBURG/CLEARWATER | LAKELAND | BRADENTON /SARASOTA/VENICE
THE COUNTIES OF HERNANDO | HILLSBOROUGH | MANATEE | PASCO | PINELLAS | POLK | SARASOTA

