

Lakeland offers the same incentives as the state of Florida. The Lakeland Economic Development Council has a great working relationship with the City of Lakeland and Polk County and is able to work with clients on a case-by-case basis. Most of the state's incentives are awarded to employers based on paying a minimum of 115% of the average annual county wages. The average annual wage for Polk County is \$34,694 or \$16.68 an hour, so 115% of the average wage would be \$39,898 or \$19.18 an hour. Incentive levels rise at 150% (\$52,041 or \$25.02) and 200% (\$69,388 or \$33.36) of average wages.



Qualified Target Industry Tax Refund

Definition of Program: Cash tax refund over a minimum of four years. Requires 20% of the award to be paid by the local community. "But for" incentive. \$3,000 per job.

Requirements: Pay 115% of average annual wage (\$39,898 or \$19.18 per hour). Ten new jobs or 10% increase in employment.

Lakeland companies receiving QTI Grants:

Job Tax Credits in Lakeland			
Company	Jobs Created	Local Tax Credit (20%)	State Tax Credit (80%)
Pepperidge Farm	80	\$86,000	\$344,000
Pepperidge Farm	38	\$22,800	\$91,200
Lockheed Martin	103	\$82,400	\$329,600
Lockheed Martin	100	\$80,000	\$320,000
Outback Essentials	24	\$14,400	\$57,600
Proconier	10	\$14,400	\$32,000
WellDyne	638	\$403,800	\$1,615,200
TOTAL	993	\$703,800	\$2,789,600

Economic Development Transportation Fund

Definition of Program: Grant to local governments to alleviate transportation impediments on behalf of business, if needed. "But for" incentive. \$7,000 per job. \$3M dollar cap. **Requirements:** Identified transportation impediment by local govt.

Lakeland Companies receiving EDTF grants:

Company	Grants
Lockheed Martin	\$2,000,000
Sooner Defense	\$2,000,000
Breed Technologies	\$2,000,000
Star Distribution	\$2,000,000
GEICO	\$2,000,000
Publix	\$1,920,000
FiberTek	\$1,900,000
GTECH	\$1,052,000
Pepperidge Farm	\$200,000
TOTAL	\$15,072,000

Workforce Incentives - Quick Response Training (QRT)

Definition of Program: Grant funding for reimbursement of customized training costs for new employees. Quick Response Training (QRT) is a customer-driven training program designed to respond quickly to meeting business-training objectives. Workforce Florida, Inc., the state's public-private partnership created to coordinate job-training efforts, administers the program.

Requirements: Goal is 115% of average wage.

Lakeland companies receiving QRT Grants:

Company	Jobs Created	Grants
QPI	246	\$112,565
GEICO	129	\$100,313
GEICO	508	\$311,640
Pepperidge Farm	40	\$97,125
Pepperidge Farm	78	\$65,520
Glendale Protective Tech.	50	\$30,639
McMillan/Blodel	52	\$97,469
Keymark	139	\$97,469
Keymark	68	\$76,125
Max Pak	57	\$19,312
Mid State Truss	22	\$17,850
Lockheed Martin	100	\$122,241
Lockheed Martin	103	\$129,780
Southern Wine and Spirits of Florida	157	\$176,715
USCO/JC Penney	590	\$218,612
Juice Bowl Products, Inc.	53	\$54,233
Colorado Boxed Beef	312	\$199,028
WellDyne	673	\$386,000
TOTALS	3,377	\$2,312,636

Incumbent Worker Training (IWT)

Definition of Program: Grant funding for reimbursement or training costs for existing employees.

Requirements: FL businesses that have been in operation for 1 year before application.

Lakeland area companies receiving IWT:

Company	No. of Employees Trained	Grants
Space Science Services	12	\$14,449
Advanced Handling	6	\$1,800
GEICO	668	\$63,410
Westworld Telecom Corp.	7	\$15,000
Integrated Metal Products	30	\$28,200
Advance Stores Company, Inc.	130	\$25,973
Alabama Metal Industries	50	\$35,200
Taw Engineered Services, Inc.	31	\$5,800
Kemira Water Solutions	27	\$24,687
TOTAL	961	\$214,519

Urban Job Tax Credit

Definition of Program: An incentive for eligible businesses located within the urban area to create jobs. Eligible for \$500 per job. **Requirements:** Located within UJTC area and create a minimum of 30 jobs.

Lakeland companies receiving Urban Job Tax Credit:

Company	Jobs	Credit
Terrace Hotel	55	\$27,500
Discount Auto Parts	16	\$8,000
Publix Super Markets	21	\$10,500
Publix Super Markets	52	\$26,000
GC Services	660	\$330,000
FiberTek	31	\$15,500
FiberTek	64	\$32,000
TOTAL	899	\$449,500

Enterprise Zone (EZ)

Sales Tax Refund for Building Materials

Definition of Program: Allows businesses a 50% credit on Florida corporate income tax, insurance premium tax or sales tax refund for donations made to local community development projects. Businesses are not required to be in the EZ to be eligible. **Requirements:** Located within the 7.38 mile area.

Sales Tax Refund for Building Materials	Amount of Refund
Triad Properties, LLC operating as Lofts on the Park	\$82,757
Prologis A3 FL1, LLC operating as Coca Cola	\$15,000
Clayton Seawright	\$9,678
New Millennial, LLC	\$5,642
Commonwealth Center of Lakeland, LLC operating as Family Dollar Store	\$5,000
Olympus LTD, operating as Keiser University	\$5,000
Bob English	\$5,000
Lakeland Interstate Warehouse LLC	\$5,000
Zoom Investments, LLC operating as JayCare Medical	\$5,000
Triton Restaurants, LLC operating as Krystals	\$4,530
Mary Banniza	\$4,472
Mark Dobersch	\$4,118
West Brannen Group, LLC	\$2,387
Miller Properties of Florida, LLC	\$2,351
Main Street Mini, LLC	\$2,250
Keystone Challenge Fund	\$2,152
LCRA	\$2,104
Bogeyless Investments, LLC operating as Linksters Tap Room	\$1,700
John Peacock	\$635
TOTAL	\$161,141

Enterprise Zone (EZ)

Sales Tax Refund for Business Equipment & Machinery

Definition of Program: A refund is available for sales taxes paid on the purchase of certain business property, which is used exclusively in the EZ for 3 years.

Sales Tax Refund for Business Equipment & Machinery	Amount of Refund
Winn Dixie	\$21,765
Williams and Williams	\$ 7,004
Crispers, LLC	\$ 4,025
Crown Dental Laboratories	\$ 2,031
Bogeyless Investments, LLC operating as Linksters Tap Room	\$ 2,225
TOTAL	\$37,050

Enterprise Zone (EZ)

Jobs Tax Credit

Definition of Program: Allows a business within the EZ to take sales & use tax credit for 20% of wages paid to new employees who reside within the EZ. To be eligible, a business must create at least one new job. The Sales Tax Credit cannot be used in conjunction with the Corporate Tax Jobs Credit.

Jobs Tax Credit	Amount of Refund
FedEx Freight System, Inc	\$11,746
TOTAL	\$11,746

Sales Tax Exemptions

Manufacturing Machinery and Equipment

Definition of Program: Machinery and Equipment purchased by new and expanding businesses that use such equipment at a fixed location to manufacture, process, compound, or produce tangible personal property for sale, or for exclusive use in spaceport activities, is sales and use tax exempt.

Repair and Labor Charges

Definition of Program: Labor charges for the repair of, and parts and materials used in the repair of and incorporated into, industrial machinery and equipment used by certain industries for manufacturing, processing, compounding, or production of items of tangible personal property at a fixed location in Florida, are sales and use tax exempt.

Semiconductor, Defense and Space Technology

Definition of Program: Certified semiconductor, defense and space technology facilities are exempt from sales and use tax on qualifying purchases or leases of machinery and equipment used in the production process.

Boiler Fuels

Definition of Program: When purchased for use as a combustible fuel, purchases of natural gas, residual oil, recycled oil, waste oil, solid waste material, coal, sulfur, wood, wood residues or wood bark used in an industrial manufacturing, processing, compounding, or production process at a fixed location in this state are exempt from the sales tax.

Research and Development

Definition of Program: Machinery and equipment, including but not limited to molds, dies, machine tooling, other appurtenances or accessories to machinery and equipment, testing and measuring equipment, test beds, computers and software, whether purchased or self-fabricated, includes materials and labor for design, fabrication and assembly, used predominantly for research and development and used to meet a qualifying research and development goal are exempt from sales and use tax.

Pollution Control

Definition of Program: Any facility or machinery used primarily for the control of pollution in manufacturing, processing, compounding, or producing for sale items of tangible personal property at a fixed location, is exempt from sales and use taxes.

Electricity and Steam

Definition of Program: Charges for electricity and steam used directly and exclusively at a fixed location to Operate machinery and equipment that is used to manufacture, process, compound or produce items of tangible personal property for sale, or to operate pollution control equipment, recycling equipment, maintenance equipment, or monitoring or control equipment used in such operations, may be exempt from the sales tax.



Polk County Bonus Incentive Program (PCBI)

Requirements: County incentive that must be approved by BoCC.

BoCC Approved Expenditures	Jobs	Amount of Reward
OUTBACK ESSENTIALS / QTI '07	36	\$14,400
ROCKFORD ETTCO/PROCUNIER / QTI '07	10	\$8,000
FIRMENICH/PCBI '08	82	\$123,000
GTech / QTI '08	221	\$132,600
WELLDYNE/QTI '08	673	\$403,800
WELLDYNE/PCBI '08		\$210,500
COLORADO BOXED BEEF/QTI '09	80	\$32,000
KEYMARK/PCBI '10	155	\$50,000
QMI/QTI & PCBI '10	30	\$18,000
TOTAL	1387	\$1,052,300

Polk County Impact Fee Mitigation

Polk County will direct the transportation impact fees (or an equivalent amount in gas tax revenue) to road improvement projects that will directly benefit the industrial operations and address transportation concurrency. The benefit will not exceed the actual transportation impact fees collected.

Requirements: County incentive that must be approved by BoCC.

Impact Fee Mitigation	Total Impact Fee	Amount of Reward
Aldi	\$271,059	\$500,000
Cellynne		\$81,318
Firmenich	\$18,420	\$9,120
Beckryger Properties LLC	\$161,670	\$80,835.3
Pepperridge Farm, Inc.	\$29,780	\$7,445
TOTAL	\$480,929	\$678,718



Downtown CRA

Tax Increment Financing (TIF)

Definition of Program: Qualified applicants will be eligible to receive tax increment on a sliding scale for a maximum of 10 years. The renovation/improvement must be 50% of the then current assessed value of the property.

Requirements: Applicant must apply for consideration prior to receiving a building permit.

TIF Approved Expenditures	Year	Amount of Reward
JJG PROPERTY (James I. Black)	2001	\$4,296.51
PANSLER	2002	\$7,839.65
COLONIAL SQ (Philpot)	2002	\$69,793.81
ITTENRUB (Burnetti PA, 211 S. Florida Ave)	2002	\$34,863.05
ODYSSEY III DP2 LLC (Heritage Plaza)	2002	\$259,808.42
CLEGHORNHERRING	2002	\$6,881.30
MIDFLORIDA (201-205 S. Florida Ave.)	2002	\$7,938.80
NORMAN INV (Vanity Fair Arcade)	2003	\$26,045.66
HISTORIC LKLD (Jerry Herring's infill building on Pine)	2004	\$58,368.55
MARCOBAY (305-309 Main Street)	2002	\$21,453.83
CLONTS	2002	\$15,142.52
TCG REGENCY (Lake Mirror Tower)	2006	\$113,337.60
XEN TWO (Anu Saxena)	2004	\$ 10,276.15
MARCOBAY (320)	2006	\$44,381.33
LKLD LANDMARK		-
CRF VII		-
SANOBA		-
EVENTUAL		-
TOTAL		\$680,427.18

Downtown CRA – Location Assistance

Definition of Program: Designed to attract High Skill/High Wage business Downtown.

Requirements: High wage jobs. 2nd floor space over retail.

Downtown CRA Approved Expenditures	Year	Amount of Reward
Blue Sky West Incubator	2009	\$23,040
	2010	\$23,040
	2011	\$23,040
TOTAL		\$69,120

*\$18,000 a year for rental subsidy

*\$5,040 a year for 12 parking spaces at OFS

Core Improvement Area

Definition of Program: Construction inside the area is eligible to have all impact fees waived except city water, wastewater and fire.

Requirements: Located within 2,353 acres designated by the City.

Core Improvement Area					
Year	Non Residential Project	Address	Use	Square Feet	Total Fees Mitigated
2008	Heath Funeral Chapel	328 S. Ingraham Ave.	Retail	4,700	\$62,712
2008	Watson Clinic	1755 N. Florida Ave.	Medical Off.	50,4210	\$1,273,987
2008	Jaycare Medical Center	135 E. 1 st Street	Medical Off. /Office	7,662 2,991	\$199,902 \$32,075
2008	Global Produce Sales Inc.	1018 E. Oleander St.	Warehouse	1,600	\$4,168
2009	Word Alive Ministries	1019 N. Tennessee Ave.	Church	12,319	\$72,399
2009	Lake Wire Center	450 Martin L. King Jr. Blvd.	Office	32,000	\$350,304
2009	Lakeland Regional Medical Center	1324 Lakeland Hills Blvd.	Office	3,250	\$35,090
7 Non Residential Projects					\$2,030,638

Mid Town CRA

Model Block Exterior Improvement Program

Definition of Program: Provides a deferred interest loan in an amount up to \$25,000 that can be used towards improvements intended to bring the property in compliance with local building & safety codes and improve the general exterior appearance of the structure.

Requirements: MBEIP will be due upon sale or transfer of the property.

Model Block Homebuyer Assistance Program

Definition of Program: Provides funds for new owner-occupants to purchase & rehabilitate homes within designated areas of the Parker Street Neighborhood. Eligible for up to \$35,000 in zero interest loan assistance that can be used as either a down payment or for repairs.

Requirements: All repairs performed by CRA approved contractor.

Infrastructure Improvement Matching Grant

Definition of Program: Up to \$15,000 dollar-for-dollar matching grant that can be used towards any public infrastructure improvement triggered by a redevelopment project within the Mid Town CRA.

Requirements: Located within Mid Town CRA.

Acquisition & Relocation Assistance Pilot Program

Definition of Program: Intended to facilitate the assembly of property for the purposes of managed expansion of existing employment centers within the Mid Town CRA.

Requirements: Must be used by redevelopment agent for redevelopment activity previously approved by CRA Board.

Mid Town CRA: Small Project Assistance		
Project	Year	Award
Swannanoa Improvements	FY 2004	\$5,000
Lakeland OB-GYN	FY 2005	\$5,000
Crawford Street Crosswalk	FY 2005	\$5,364
SAKS Oriental Rugs	FY 2006	\$5,000
503 E. Valencia St.	FY 2009	\$5,000
Revival Center Outreach Ministries	FY 2010	\$15,000 (committed)
6 Projects		\$40,364
Mid Town CRA: Model Block Homebuyer Down Payment Assistance		
720 E. Peachtree St. – MacDonald	FY 2007	\$34,700
701 Mabel Avenue - Camp	FY 2007	\$34,206
715 E. Peachtree St. – Carter	FY 2007	\$35,000
618 N. Stella Ave. – Allen	FY 2008	\$34,000
719 E. Magnolia Street – Preast	FY 2008	\$31,448
621 N. Stella Ave. – Blom	FY 2008	\$35,000
509 N. Stella Ave. – Collier	FY 2009	\$33,916
720 E. Parker St. – Woods	FY 2009	\$35,000
411 N. Stella Ave. - Dorado	FY 2010	\$34,999
9 Projects		\$308,270
Mid Town CRA: Acquisition & Relocation Assistance		
LRMC – Diane Canady	FY 2008	
WC –Hinton- 1670 W. Lane	FY 2009	
Diane Canady	FY 2009	
Bernice Anthony	FY 2009	
Catherine T. Grimsley	FY 2009	
208 W. Lane – Scott	FY 2010	
212 W. Lane – Buxton	FY 2010	
1609 W. Lane – Brown	FY 2010	
1601 W. Lane – Gordon	FY 2010	
9 Projects		\$344,242
Mid Town CRA: Other		
Crossroad Motor Lodge (demo)	FY 2008	\$213,887
Lakewood Terrace (132 units affordable housing)	FY 2009	\$153,000
2 Projects		\$366,887

Dixieland CRA

Facade Improvement Matching Grant

Definition of Program: \$15,000 dollar-to-dollar matching grant that can be used towards any exterior architectural improvements on the street side facade. Available to all commercial property owners within the Dixieland CRA. Intended for rehabilitation and restoration only.

Requirements: Govt. entities and not-for-profit are not eligible. New construction is not eligible.

Model Block Homebuyer Assistance Program

Definition of Program: Professional guidance for how to improve the most prominent facades of your building. Available to all Dixieland CRA commercial property owners.

Requirements: Govt. entities are not eligible.

Marketing, Promotions & Education

Definition of Program: District marketing initiatives including Twitter, Facebook, HTML newsletter. Quarterly cluster promotions & quarterly informational workshops/educational opportunities for small business.

Requirements: Dixieland business

Dixieland CRA Business Owner Incentives							
Promotion	Year	# of Businesses	# of Customers	# of New Customers	Total Sales Generated	Avg. spent per customer	Cost to LCRA
Superbowl	2008	9	82	4	\$1,252	\$15	\$904
Valentines Day	2008	10	16	2	\$820	\$51	\$717
Spring Cleaning	2008	10	52	11	\$4,232	\$81	\$738
Administrative Prof. Day	2008	5	0	0	\$-	-	\$427
Mother's Day	2008	5	6	3	\$457	\$76	\$427
4 th of July	2008	6	22	12	\$1,083	\$49	\$583
Back To School	2008	6	12	7	\$655	\$55	\$399
Thanksgiving	2009	5	4	2	\$60	\$15	\$226
Beat the Heat	2009	5	52	4	\$995	\$19	\$382
Holiday Hours	2009	13	NA	NA	\$	NA	\$1,000
		61	246	45	\$9,554	\$39	\$4,803

Dixieland CRA Business Owner Incentives		
Workshop	Year	Number of Participants
Intro to Workshop Concept	FY 2008	13
Image is Everything (October)	FY 2008	8
Small Business Tax Workshop (June)	FY 2008	3
Customer Service (August)	FY 2008	15
How To Grow Your Small Business (December)	FY 2009	16
Social Media (March)	FY 2009	24
Social Media Part Deux (April)	FY 2009	29
Meet and Greet (August)	FY 2009	30
Planning For the Future of Your Small Business (December)	FY 2010	25
		163