

A CENTRAL FLORIDA FOUNDATION REPORT

2023-2024

Community Landscape



CENTRAL FLORIDA
FOUNDATION



THRIVE CENTRAL FLORIDA



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About Central Florida Foundation

Building Community by Building Philanthropy

WE ARE YOUR
COMMUNITY
FOUNDATION.



COLLABORATION

We bring all the essential partners to the table—researchers, policy makers, business leaders, supporters and other stakeholders.



IDEAS

We generate ideas to address the root cause of the challenge rather than simply fixing the symptoms.



INVESTMENT

We connect strategy to philanthropy, coordinating community-wide investment into one-of-a-kind solutions.



INNOVATION

We pilot big-picture, systemic solutions with the potential to change things for good. True impact requires unique approaches to issues.



LEGACY

We create real, lasting change as stewards of our community's resources, passion and investment that will last well into the future.

WHO WE ARE

As our region's community foundation, Central Florida Foundation serves as a launchpad for high-impact philanthropy. Championing the collective power of head, heart and dollar, we coordinate the commitment and investment of philanthropists, nonprofits, and community partners to target today's most critical challenges and those on the horizon to truly transform our community. The Foundation also offers expert giving advice, a personalized approach to managing charitable funds, and the capacity to convene collaboration across sectors. Learn more at cffound.org.

Connect with us.

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Community Landscape

Powered by Thrive Central Florida, creating a healthy and thriving community.

Central Florida is a dynamic and welcoming region, brimming with opportunities and a warm, inclusive spirit. The community is a magnet for people seeking a vibrant lifestyle, offering an unparalleled blend of sunshine, diverse cultures, and a thriving economy.

A Destination for Growth and Opportunity

Central Florida's attractiveness is evident in its steady population growth, with an average annual increase of around 2% over the past five years. This influx of residents fuels our region's economic vitality, driving demand for goods and services and creating new employment opportunities.

Tourism is the backbone of our economy, with over 74 million visitors in 2022 contributing an impressive \$87.6 billion in economic impact. This industry has been instrumental in job creation, with hospitality and tourism accounting for 43% of all jobs in Orange County and 36% in Osceola County.

Addressing Challenges and Shaping a Brighter Future

While our community thrives, we acknowledge the challenges that persist. Despite the upward trend in wages, reaching \$15 an hour for many tourism employees, it still falls short of ensuring a family's well-being. Central Florida, despite its economic vibrancy, faces hurdles in housing, transportation, and healthcare. While unemployment remains low, with a rate consistently below 5% since September 2021, we recognize the need to bolster our safety net. Florida currently ranks 51st in the nation in terms of support for vulnerable individuals.

This is exemplified by the limited maximum weekly unemployment benefits of \$275 for 12 weeks, regardless of an individual's previous position or pay. Additionally, the application process for safety net benefits is cumbersome, requiring online access, which can pose a barrier for those in need.

One of the identified areas of concern is the workforce pipeline. Even with a robust secondary education system, several industries are struggling to find qualified workers. Included in this shortage are healthcare and childcare workers, as well as teachers. This shortage has shown up in several reports including the Mental Health Task Force study Orange County commissioned in partnership with the Heart of Florida United Way and the 2022 Community Health Needs Assessment [CHNA].

The shortage of available housing is causing an increase in cost burden to many families in Central Florida. While there are more rental housing units available for rent than there are renters, the distribution of those units does not match up with the needs. Many lower-income residents are finding it challenging to find and maintain housing near the places where they work. Homelessness has also increased because of the attainable housing shortage.

Central Florida has many benefits, from theme parks to green spaces to arts and culture. There are many places to go for relaxation and entertainment. The arts community is robust, and shows are well attended, but organizations are challenged because ticket prices alone do not pay all the bills, which means they need to continuously seek outside funds including both public and private sector support.

The Green Works program from the City of Orlando focuses on sustainability, increasing green spaces, and lowering our carbon footprint. Many great programs have been launched because of this program including solar power and autonomous and electric vehicles. There is still work to be done and both Orange County and the City of Orlando have invested in sustainability and innovation.

Central Florida also scores high on the diversity scale. There are over 160 languages spoken in the Orange County Public School system. The students come from 209 different countries.





In Central Florida Foundation’s TableTalk conversations and surveys, the community’s diversity is one of the reasons people love living in this area. For some immigrants, however, there is a sense of fear and stress due to language limitations and immigration status.

A Collaborative Spirit for a Shared Future

Central Florida is a community that stands together. We have a multitude of nonprofit organizations and government agencies dedicated to uplifting our most vulnerable citizens. Collaborative efforts are breaking down silos and fostering innovative solutions to our social challenges.

Thrive: A Framework for Sustainable Development

Central Florida Foundation's Thrive framework aligns with the United Nations Sustainable Development Goals (SDGs), focusing on five key areas: Education, Healthcare, Livability, Economic Stability, and Community and Social Connection. These areas are closely linked to the Social Determinants of Health (SDOH) and align with the Orange County Pillars.



Through the Thrive framework, data is gathered on community well-being and engages residents and leaders in setting shared goals. At its core, Thrive is about discovery, collaboration, practical solutions, and accountability.

The horizon goal for Thrive is to create a healthy and thriving community. A healthy and thriving community is one with:



- ☑ Income for basic needs (at minimum)
- ☑ Stable housing
- ☑ Nutritious food
- ☑ Transportation access
- ☑ Good educational opportunities
- ☑ Social networks
- ☑ Healthcare homes or primary care
- ☑ Fresh air, recreation, and arts & culture
- ☑ A properly working system of justice
- ☑ A feeling of safety

Central Florida: A Community of Endless Possibilities

Central Florida is a place of boundless opportunities, where individuals and families can thrive. Our community's warm embrace, coupled with our commitment to sustainable growth and social progress, makes us an ideal place to call home. Together, we are shaping a bright future for generations to come.

About this Community Landscape

This Community Landscape Report has been designed for the purpose of giving a high-level overview of the region, through the Thrive Framework, which is organized into five focus areas: Economic Stability, Healthcare, Education, Livability, and Community & Social Connection.

Following each focus area's overview, challenges and opportunities are outlined, with many sources linked for easy access for further research. A glossary is provided at the end of this report for clarity.

For questions on this report, please reach out to Sandi Vidal at svidal@cffound.org.



**Click to learn more
about Thrive!**



Let's love our community.



Economic Stability



In the heart of Florida, Central Florida stands as a vibrant hub of diverse communities and thriving industries. However, beneath the surface of this bustling region lies a stark reality – nearly half of the population struggles to meet their basic needs or faces financial strain due to high housing and transportation costs. This economic instability casts a shadow over the lives of many Central Floridians, hindering their ability to pursue their aspirations and fully participate in the region's prosperity.

The ALICE (Asset Limited, Income Constrained, Employed) report from the Heart of Florida United Way paints a sobering picture, revealing that 47% of Central Florida's residents fall below the ALICE threshold. These individuals and families grapple with the constant challenge of balancing their limited incomes with the rising costs of living, often forced to make difficult choices between essential needs like housing, food, and healthcare.

Housing emerges as a significant barrier to economic stability. The National Low

Income Housing Coalition's (NLIHC) gap report highlights the mismatch between housing supply and affordability in Florida. While the state boasts a surplus of housing units overall, a stark shortage exists for lower-income residents. This disparity drives up rental costs and forces families to allocate an unsustainable portion of their income toward housing, further straining their economic well-being.

Despite the daunting challenges, a beacon of hope shines through the collective efforts of community organizations, government agencies, and concerned citizens. Numerous initiatives and collaborations are underway, each contributing to the broader goal of enhancing income and economic stability for Central Floridians.

One such initiative is the Housing for All Task Force, spearheaded by Orange County Mayor Jerry Demings, which aims to address the region's housing affordability crisis by expanding access to affordable housing options. Additionally, the American Rescue Plan has provided crucial financial assistance, including rent relief and



business grants, offering a lifeline to many families and businesses that struggled during the pandemic.

These collective efforts serve as a testament to the unwavering commitment of Central Floridians to build a more equitable and prosperous community. By addressing the root causes of economic instability, we can empower individuals and families to reach their full potential and contribute to the region's continued growth and success.

Challenges

- ✔ Limited Transportation Access: Inadequate public transportation infrastructure hinders job accessibility for many residents.
- ✔ Labor Shortages: Critical industries, including healthcare, childcare, and hospitality, face severe labor shortages.
- ✔ Unattainable Housing: Housing costs strain household budgets, making homeownership and rental options unattainable for many residents.
- ✔ Insufficient Business Support: Fragmented and inaccessible resources hinder business growth and entrepreneurship.
- ✔ Disjointed Social Services: Lack of coordination between nonprofit and government social service agencies can impede effective assistance delivery.
- ✔ Fiscal Cliff Risk: Rising wages may lead to a fiscal cliff if not accompanied by careful financial planning.

Opportunities

- ✔ Alternative Transportation Solutions: Explore rideshare programs and other innovative approaches to supplement mass transportation.
- ✔ Skill-based Hiring and Training: Collaborate with local businesses and human resources professionals to identify skill-based hiring practices, reducing unnecessary education or experience requirements for entry-level jobs.
- ✔ Integrated Education and Training: Align education and training programs with in-demand job opportunities, creating a seamless pathway for individuals to acquire the skills required for employment.

Economic Stability



Focus Area Subgoals

1

Increase Income

2

Transportation Solutions

3

Attainable Housing



“For true change, we must bring our head, heart and wallet to the table.”

**-Mark Brewer,
President/CEO,
Central Florida
Foundation**

- ✔ Housing for All Task Force: Address the housing affordability crisis by expanding access to affordable housing options.
- ✔ Expand the ESOL for Working Adults model outside the I-Drive corridor.
- ✔ Mental Health Workforce Pipeline: Establish a workforce pipeline task force specifically focused on addressing the mental health workforce shortage.
- ✔ Central Florida Housing Impact Fund and Land Trust: Utilize the Housing Impact Fund and land trust mechanisms to increase the supply of affordable housing units.
- ✔ Digital Twin for Data Modeling: Leverage the Orlando Economic Partnership's digital twin platform to effectively analyze and model data for informed decision making.
- ✔ Innovation and Entrepreneurship Hub: Foster a vibrant environment that attracts and nurtures innovation and entrepreneurship.
- ✔ Live Local Act: Increase housing availability in areas previously not zoned for housing.
- ✔ Help Source Alignment: Enhance coordination between help sources, such as Findhelp.org, 2-1-1, and Unite Us, to provide seamless access to assistance.
- ✔ Resource Mapping: Develop a comprehensive resource map that clearly outlines the flow of assistance between agencies and government programs.
- ✔ Face the Housing Crisis Campaign: Support the efforts of Habit for Humanity of Greater Orlando and Osceola County in addressing the housing crisis.

First You Talk

Central Florida Foundation's podcast is about taking complex problems that affect Central Floridians and guiding listeners to understand the issue in a digestible way. You can expect to come out of each episode being better informed, experiencing an increase in empathy, and having a stronger ability to discuss these difficult problems in a thoughtful way.

Episode 2: What are we going to do about our housing crisis? [Listen now.](#)



Healthcare

Central Florida boasts a robust healthcare system, encompassing a network of hospitals, clinics, and urgent care centers, along with two medical schools and several teaching hospitals. Renowned for its quality, Central Florida's healthcare system has been ranked among the nation's best by U.S. News & World Report's 2023-2024 edition.

Despite this robust system, challenges remain. Access to care is not uniform across the region, with some areas having fewer healthcare providers than others. Additionally, factors such as transportation costs, language barriers, and lack of insurance can hinder access to care for some Central Floridians.

Mental health services also face challenges. A shortage of mental health care providers exists, compounded by a stigma surrounding mental health that discourages individuals from seeking care.

The unwinding of Medicaid in the first half of 2023 led to a marked decrease in insurance coverage, further complicating access to care. Additionally, some

communities lack awareness of non-emergency care options outside the emergency room system. Telehealth, which expanded access during COVID-19, is no longer widely available or free under many insurance plans.

Despite these challenges, there have been positive developments. In Orange County, nearly all common causes of death decreased between 2017 and 2019, except for unintentional injury, which rose by 6.3%.

Addressing the challenges faced by Central Florida's healthcare system is crucial to ensuring equitable access to quality care for all residents. By addressing these challenges, Central Florida can promote healthier lives and communities.





Challenges

- ✔ Barriers to Primary Care Access: Limited access to primary care providers due to transportation issues, lack of insurance, or scheduling difficulties.
- ✔ Fragmented Healthcare System: Disconnected medical records systems and a shortage of healthcare workers hinder coordinated care.
- ✔ Inadequate Mental Health Care: Insufficient mental health care providers and a lack of universal screening for social determinants of health (SDOH) impede effective care delivery.
- ✔ Maternal mortality was highest in women who identify as Black/African American (31.9%), which is more than two times higher than the maternal mortality average in Orange County (12.2%).
- ✔ Limited Training on SDOH: Physicians and staff lack time and resources for adequate training on addressing SDOH, affecting patient care.
- ✔ Dental Care Access: Access to affordable dental care is challenging due to long waitlists at low-cost providers.
- ✔ Food Pantry Limitations: Food pantry hours of operation restrict access to essential food assistance.
- ✔ Concerns about immigration status may deter some immigrants from seeking necessary healthcare services.
- ✔ Unintentional injury is the 3rd leading cause of death behind heart disease and cancer.
- ✔ Shortage of beds for people with Serious Mental Illness (SMI).

Opportunities

- ✔ Integrated Referral Services: Enhance coordination between referral services like Findhelp.org, Unite Us, and 2-1-1 to streamline navigation to appropriate resources.
- ✔ Universal SDOH Screening: Implement universal screening for SDOH with clear referral pathways to address underlying social factors impacting health.
- ✔ Healthcare Innovation: Foster healthcare innovation through collaboration between hospitals and medical schools to improve care delivery.
- ✔ Expanded Community Partnerships: Broaden community partnerships for the Community Health Improvement Plan, incorporating businesses to address health disparities.

Healthcare



Focus Area Subgoals

1

Access to Healthcare

2

Health Equity

3

Mental Healthcare



“Our work group is a unique opportunity to bring people from all types of health organizations into the same room.”

- ✔ Healthcare Information Clearinghouse: Establish a centralized healthcare information clearinghouse to facilitate coordinated care.
- ✔ Enhanced Mental Health Care Coordination: Improve coordination of mental health care and expand peer support services to enhance patient outcomes.
- ✔ Telehealth Expansion: Expand telehealth services to increase access to care, particularly for underserved populations.
- ✔ Model Healthcare Center Replication: Replicate Lift Orlando's successful new health center model to expand accessible, quality care.
- ✔ Increased focus on maternal health and infant mortality.
- ✔ Thrive Healthcare workgroup stewardship document: working towards a healthy and thriving community.



-Sandi Vidal, VP of Community Strategies and Initiatives, Central Florida Foundation

Thrive Healthcare Work Group

Central Florida Foundation convenes a workgroup that is a collaboration of subject-matter experts from different areas of healthcare working together to identify ways to increase health equity and mental health care, and ensure people get the care they need. We do this through a design thinking strategy, research on best practices, and models that are working in other communities. The group meets 6 times a year and works on improving systems and filling gaps.



Education

The 2023 Kids Count Data Book reveals statistics regarding education in Florida. A staggering 61% of 4th graders are not proficient in reading, while only 26% of 8th graders demonstrate proficiency in math. These numbers have worsened since the COVID-19 pandemic. Despite Florida outperforming the nation in reading scores, the state still earns a failing grade, with only 39% of 4th graders reading on grade level. Furthermore, half of all children ages 3 and 4 in Florida do not attend school, potentially hindering their future learning. The state also faces a severe shortage of teachers and childcare workers due to low pay and challenging work conditions, leading to many teachers leaving the profession and a scarcity of new certified teachers entering the workforce. These statistics highlight the urgent need for improvements in Florida's educational system.

On the flip side, Florida ranks #1 in education overall, according to U.S. News & World Reports. This is due to the state's strong performance in both higher

education [#1] and Pre-K-12 education [#14]. For Pre-K-12, Florida's high scores are based on factors such as college readiness, math and reading scores, graduation rates, and Pre-K enrollment. For higher education, Florida's strong performance is driven by factors such as 2 and 4-year graduation rates, debt at graduation, educational attainment, and tuition and fees. Florida's low tuition rates are a key factor in its overall #1 ranking.

100 WOMEN STRONG

In 2023, 100 Women Strong [100WS], a strategic giving circle at Central Florida Foundation, invested in a childcare teacher workforce pipeline.

Read more about this grant and its impact [here](#).



Challenges

- ✔ Literacy and Numeracy: Improving reading and math proficiency among students is essential for students' academic success and future career opportunities.
- ✔ Teacher Compensation: Attracting and retaining qualified teachers requires addressing teacher pay and compensation.
- ✔ School Transportation and Childcare: Ensuring adequate transportation for school children and addressing the childcare worker shortage are critical for families' work-life balance.
- ✔ Early Childhood Education: Expanding access to universal voluntary pre-kindergarten programs can provide a strong foundation for children's learning and development.
- ✔ Trades Education: Promoting trades as viable and rewarding career options can prepare individuals for in-demand jobs and meet workforce needs.

Opportunities

- ✔ Career Exploration: Increasing student knowledge and understanding of diverse career options can help them make informed decisions about their future paths.
- ✔ Childcare Worker Support: Providing incentives, including educational pathways and retention bonuses, can attract and retain qualified childcare workers.
- ✔ Broadband Access: Expanding broadband access through ARPA funds and device rentals can bridge the digital divide and support remote learning.
- ✔ Evidence-Based Reading Instruction: Implementing evidence-based reading instruction methods, such as those demonstrated by the REED Foundation, can improve literacy outcomes.
- ✔ Resiliency Training: Integrating resilience training into school curricula can equip students and educators with tools to cope with stress, adversity, and trauma.

Education



Focus Area Subgoals

1

Increase Kindergarten Readiness

2

Connect Graduates to a Career Path

3

Increase Educational Equity



Livability



Livability encompasses neighborhoods, the environment, public safety, and the arts. The Central Florida community offers a vibrant environment with a focus on safety and sustainability. An example of this would be the Dr. Phillips Performing Arts Center, now boasting the Steinmetz Theater, which stands as a world-class venue. There are ongoing efforts to reduce crime and build community trust as evidenced in programs like Advanced Peace, Credible Messengers, and community policing initiatives. The East Central Florida Regional Planning Council further prioritizes resilience through its strategic plan and dashboard.

Green initiatives are central to the region's future, with the [Green Works Orlando Initiative](#) outlining comprehensive plans for renewable energy, conservation, improved public transportation, and urban green spaces. While Seminole County addresses a recent water quality issue, other efforts continue to improve air and water quality throughout Central Florida.

Challenges

- ✓ Regulatory Barriers: Pre-emptive legislation can hinder innovation and adoption of sustainable practices, such as green industry products.
- ✓ Climate Resilience: Weather conditions and the need for increased resiliency pose challenges to infrastructure and livability.
- ✓ Urban Sprawl: Uncontrolled urban sprawl can strain resources, damage ecosystems, and contribute to environmental degradation.
- ✓ Disaster Preparedness: Ensuring adequate disaster preparedness is crucial for mitigating the impact of natural disasters and protecting communities.
- ✓ Arts Funding: Sustainable funding models are needed to support the arts and their contribution to community vibrancy.
- ✓ Water Management: Water runoff and flooding can cause property damage, disrupt transportation, and pose environmental risks.
- ✓ Public safety: Gun and neighborhood violence, police/citizen relationships.



Opportunities

- ✔ Urban Sustainability: Promoting urban farming and beehive expansion can enhance food security and environmental sustainability.
- ✔ Solar Energy Expansion: Expanding solar energy adoption can reduce reliance on fossil fuels and promote clean energy.
- ✔ Parametric Insurance: Implementing parametric insurance for windstorm damage can provide financial protection for communities.
- ✔ Neighborhood Revitalization: Continued efforts in neighborhood revitalization can improve living conditions and foster community engagement.
- ✔ Public Art Integration: Integrating more public art into the cityscape can enhance aesthetics, promote cultural expression, and revitalize communities.
- ✔ Promote Florida-friendly landscaping practices, particularly those utilizing natural fertilization methods, to minimize environmental impact on waterways.
- ✔ Expanding recycling and composting programs can significantly reduce waste, conserve resources, and protect the environment.
- ✔ Support programs that advance progress in this area, such as [Advance Peace](#) and [Credible Messengers](#), and [Bike/Walk Central Florida](#).
- ✔ Crisis Intervention Training (CIT) for police departments and partnerships with the Behavioral Health System.
- ✔ Work with the [Peace and Justice Institute](#) and [Stono Institute](#) to create healthy dialogues and build relationships.

Livability



Focus Area Subgoals

1

Address Environmental Preservation

2

Ensure safe neighborhoods

3

Invest in arts and culture

Rally.

Rally, our region's social enterprise accelerator, works with early-stage entrepreneurs who are working on ventures with a double-bottom line. Winter '22 Fellow, Joseph Genovesi, and his business, Kolumi, now partners with the City of Orlando, helping it to achieve and maintain LEED Gold Status.



Community & Social Connection



Studies have consistently shown that people who have strong social connections are happier and more satisfied with their lives. This is likely because social connection provides us with a sense of belonging, support, and purpose, all of which are essential for happiness and well-being. Our need for community and social connections is deeply rooted in our biology, psychology, and survival instincts.

Central Florida does have a strong sense of community and collaborative efforts take place regularly within the community. There is active involvement in local organizations and clubs and plenty of volunteer opportunities and ways to engage.

Voter turnout wanes depending on whether it is a presidential election year or not, and the issues being presented on the ballot. There are organizations targeted at educating voters.

Listening Sessions

During the summer of 2023, Central Florida Foundation convened multiple workgroups to assess gaps in this area.

Due to the transient population, limited transportation, and large size of the area, it can be difficult for some people to engage. Increasingly, seniors are feeling more isolated, and many of the groups within the greater Orlando area have unique needs. Several nonprofits are working in this space including Seniors First, Senior Resource Alliance, Peer Support Space, The Center, and many religious organizations.

Overall, while there are challenges, the social landscape in Orlando and Central Florida offers a plethora of opportunities for connection and community. By taking advantage of the available resources and actively seeking out social engagement, you can build meaningful connections and thrive in this vibrant region.





Challenges

- ✔ Social Fragmentation: addressing social fragmentation and promoting cross-cultural understanding can foster a more inclusive and cohesive community.
- ✔ Loneliness and Isolation: the need for a sense of belonging.
- ✔ Reintegration Barriers: Removing barriers to employment, housing, and voting for the formerly incarcerated can reduce recidivism and promote successful reintegration into society.
- ✔ Domestic Violence: Addressing domestic violence, which disproportionately affects women, requires comprehensive prevention efforts, support services, and perpetrator accountability.
- ✔ Non-Presidential Year voter turnout is less than 50%. Municipal election turnout is under 20%. For the 2020 election, turnout was 75.38% in Orange County.

Opportunities

- ✔ Orange County is the 2nd most diverse county in Florida.
- ✔ Cultural Dialogue: Encouraging open conversations and knowledge sharing around diverse cultures can promote understanding, appreciation, and respect.
- ✔ Voting Rights Advocacy: Continued efforts to expand voting rights and civic participation are essential for a truly representative democracy.
- ✔ Community-Based Programs: Supporting organizations like the Peace and Justice Institute, Stono Institute, and the [Interfaith Council of Central Florida](#) can foster dialogue, promote restorative justice, and address community needs.
- ✔ Safety and Social Justice: Prioritizing safety, social justice, and equity in community planning and policies can create a more just and inclusive society for all.
- ✔ Increased focus on voter turnout.

Community & Social Connection



Focus Area Subgoals

1

Reduce Racial Inequality

2

Increase Gender Equality

3

Increase Civic Engagement

Glossary

TERM	DEFINITION
Attainable Housing	Housing that costs less than a third of the average workforce-level pay
Community Resilience	A community's ability to anticipate, plan for, and subsequently recover from changing conditions
Equity	The quality of being fair and impartial
Fiscal Cliff Effect	The loss of benefits or subsidies that occurs with career and pay advancements
Parametric Insurance	A type of insurance that covers the possibility of an event happening, such as a natural disaster
Resource Mapping	The process of visually documenting where community resources are located with the goal of improved public knowledge and access
Social Fragmentation	The deterioration of connections within a community
Workforce Pipeline	The upcoming individuals who, upon training and/or other requirements, are ready to join an industry's workforce

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