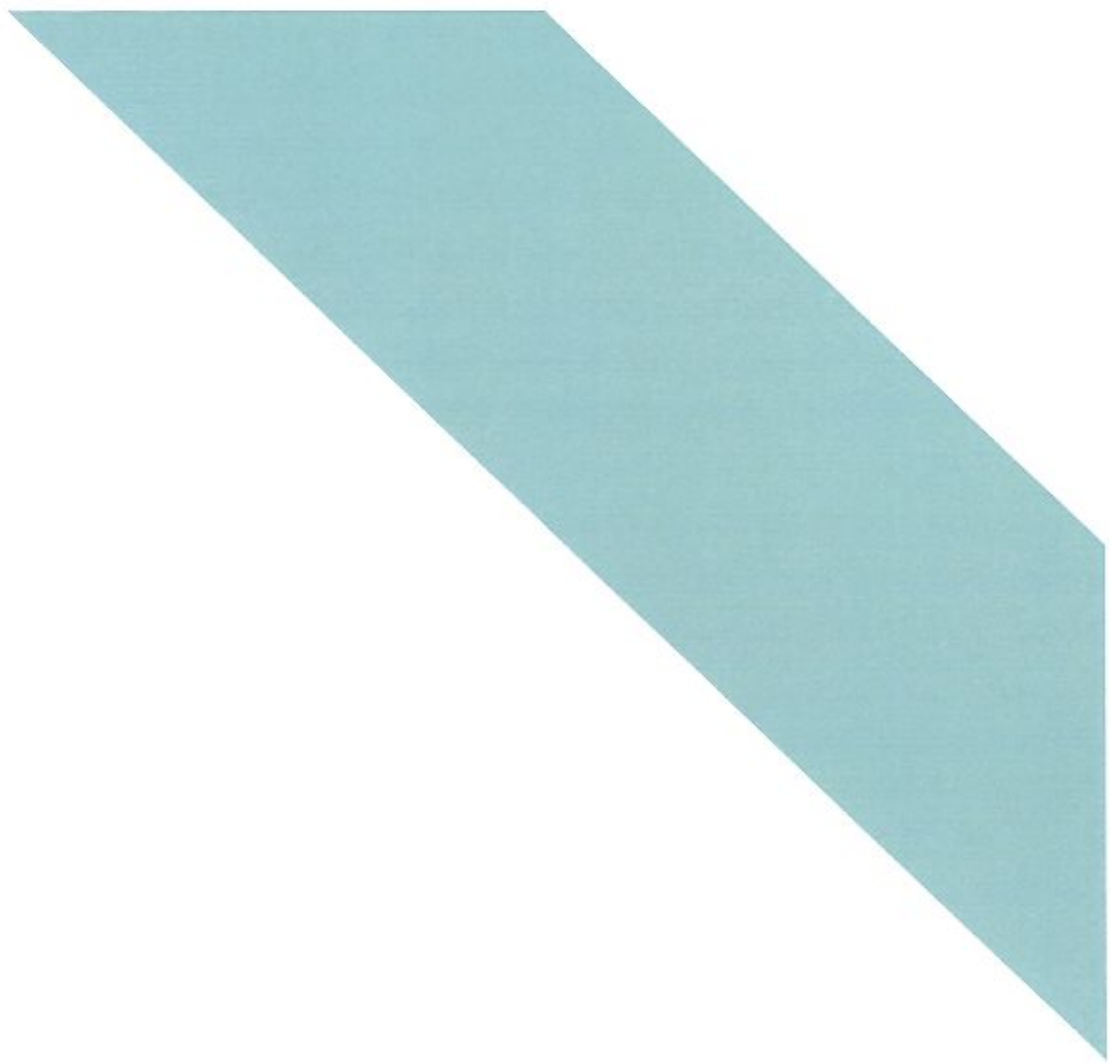




COLLIER COUNTY: COMMUNITY NEEDS AND ASSETS ASSESSMENT





ACKNOWLEDGMENTS

Q-Q Research Consultants would like to thank RMSFF staff, the Collier County community, and colleagues who were integral in processes (such as survey development, community engagement, and data collection) that helped reveal the genuine needs of the Collier County community.

The RMSFF and its Community Assessment Advisory Committee guided the CNA development. RMSFF is a collaborative body whose mission is to improve the lives of others, particularly U.S. middle- and working-class families, through results-oriented investments in human and social services, education, and health and medicine with a special focus on the seven-county metropolitan area of Minneapolis and St. Paul, and Lee and Collier counties in Florida. Membership on the Community Assessment Advisory Committee included the following organizations:

Artis – Naples,
Arthrex, Inc.,
Champions for Learning,
City of Naples,
Collier County Emergency Management Services,
Collier County Public Schools,
Community Foundation of Collier County,
Conservancy of Southwest Florida,
Collier County Manager's Office,
Collier County Sheriff's Office,
Florida Gulf Coast University,
Florida Southwestern College,
Future Ready Collier,
Greater Naples Chamber of Commerce,
Greater Naples Leadership Organization,

Habitat for Humanity,
Healthcare Network of SWFL,
Hodges University,
Immokalee Community Redevelopment Agency,
Marco Island Police Department,
Naples Children & Education Foundation,
Naples Community Hospital,
Naples Daily News,
Naples Senior Center,
Neighborhood Health Clinic,
Southwest Florida Workforce Development Board, and
The United Way of Collier County.

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EXECUTIVE SUMMARY

Welcome to the 2017 Collier County Community Needs and Assets Assessment (CNA). The CNA offers a portrait of Collier County and the needs of its residents by presenting data on demographic and socioeconomic characteristics, as well as an appraisal of economic, physical, service, and social environments. The CNA also moves beyond specifics to provide a broader analysis regarding foundational issues that impact quality of life and assets found within the county.

The CNA addressed three primary objectives:

1. Identify and quantify the conditions, needs, and assets of the community,
2. analyze the access and delivery of resources to the county residents,
3. provide findings that will allow community leaders and members to develop priorities and strategies to address identified needs and gaps while utilizing and mobilizing existing resources.

The CNA employed a community based participatory approach engaging over 4,000 community members to achieve the following goals:

- 
- 
1. Identify the needs of all types of residents within Collier County, including those of special and vulnerable populations;
 2. Identify assets found within Collier County;
 3. Obtain data on populations for which we have little quantitative or qualitative data; and
 4. Build relationships between the community and RMSFF.



In order to achieve these goals and objectives, the CNA involved three steps: 1) community engagement achieved by conducting surveys and focus groups, 2) assessment of prior reports, and 3) community need identification. The key insights discussed below can be used by stakeholders to make recommendations for collaborative action incorporating objectives and strategies to meet the identified needs of Collier County residents while leveraging existing assets.

The CNA identified needs and assets that impact the lives of Collier County residents in the following domains:

1. Employment and Economic Opportunity
2. Housing
3. Transportation/Infrastructure
4. Environment
5. Health Care
6. Education and Other Social Services
7. Well-being and Community Cohesion
8. Health and Health Behaviors
9. Recreation and Leisure (including Culture and The Arts)
10. Safety

In addition, the CNA identified a foundational issue contributing to local needs: economic barriers for residents.

Overall, the Collier County community is growing, aging and diversifying. Between 2010 and 2016 the population in Collier County grew by 12.9% to 365,136, out pacing population growth in Florida (9.2%). Collier is the 16th most populous county in the state, and by 2030, Collier County's population is expected to increase over 20%. The population of Collier County is considerably older than that of the State of Florida and is the 9th ranked county in Florida by percent of population ages 65 and over. The greatest population growth is anticipated to be among the 65-plus age group, with an expected increase from about 26% of the total population in 2010 to almost 34% in 2040. Though Collier County's population is mostly White, the county has a very diverse population of residents (64% identify as White only, 27% identify as Hispanic Latino, and 7% identify as Black/African American). Growth in the number of Hispanic/Latino, Black, and multi-ethnic residents is expected to continue on an upward trend between now and 2040.

EMPLOYMENT AND ECONOMIC OPPORTUNITY

There is a large income gap between the richest and poorest residents of the county. Large segments of the population earn six-figures (28%), while a considerable percentage live below the federal poverty level (FPL) (17%). The top 1% of residents in the county have an average household income of \$4,191,055, while the bottom 99% have an average household income of \$57,258. The cost of living in Collier County is high for many residents. The minimum sustainable living wage for a family of 4 is estimated to be at \$66,127, higher than the average household income for the bottom 99%. A considerable percentage of families (34%) have difficulty meeting basic needs.

Although residents feel jobs are available, often times, income earned from employment isn't enough to meet needs. Many of the available employment opportunities often have a median wage below amount needed for self-sufficiency (\$15.90 hourly each for a family of 4, if both adults work). The greatest projected areas for job growth in the county are in industries that offer low wages, such as in the retail and service sectors. Job opportunities will be available in higher wage jobs (e.g., nursing, skilled labor), but these opportunities require additional training/education.

HOUSING

Many residents and experts agree that Collier County residents have a hard time finding affordable housing. The average single-family home value in Collier County was estimated at \$573,519, which is much higher than the state average of \$219,681. About 40% of Collier County residents qualify as "housing-cost burdened", meaning they spend at least 30% of their available income on rent or mortgage, causing them to make difficult choices involving cutting back on other basic necessities. High housing costs can lead to poor housing conditions, which differentially impacts low-income residents. This can result in substandard housing which is a concern in the Immokalee area.

The high cost of living is driven by the housing costs. There is a lack of affordable houses on the market for sale and rent, and a lack of subsidized housing for the elderly and low-income resident. Community members stated that the housing costs drive many middle class and lower-income residents (including public service and service workers) to move to nearby counties and towns, like Lee and Lehigh, where they spend the earnings they made in Collier County.

TRANSPORTATION AND INFRASTRUCTURE

Most residents in Collier County commute using their own vehicles and very few use public transportation, citing lack of options. Those who have to commute long distances to work have an additional transportation cost burden that can further impact quality of life. Traffic pattern fluctuations are seasonal, with traffic worsening during the peak season. Experts predict traffic in the western areas of the county will be above average until services in eastern parts of the county match the residential growth in those areas. Residents in zip codes west of Collier Blvd and in the northern parts of the county were most dissatisfied with traffic's effect on their daily lives. Focus group participants raised concerns about the lack of public transportation and the lack of safe walkable and bikeable pathways. However, results indicated that multi-modal forms of transportation (i.e., biking and walking) are not equally supported by the public; half of survey participants were satisfied with public transportation and felt that residents had access to transportation, while the other half disagreed. According to expert participants, roads in Collier County are at capacity, and more 4-6 lane roads are being built for a car-centric culture among residents.

Overall, residents in Collier County were generally satisfied with the cleanliness of their community and with the public space management. They believe that their communities are well-maintained (82%) and that they have access to clean outdoor facilities (81%). They reported being satisfied with public building maintenance (74%) and with maintenance of streets/roads (82%). This trend did not hold for the communities of Copeland, Chokoloskee, Everglades City, Goodland, and Immokalee, who were generally dissatisfied with the maintenance of their community. In addition, Copeland and Immokalee were also less satisfied with their air quality, water quality, and green spaces.

ENVIRONMENT

There were several environmental concerns and issues raised by experts, including growth related environmental impact on land and wetlands and storm water drainage concerns. Experts were also worried that the focus on improving beach access and parking posed a threat to beaches. Finally, they were concerned about the lack of focus on sea-level rise by community leaders. More education/awareness on water quality, conservation and threats to the environment are needed for the general public to fully comprehend the risks to environment and how these issues affect their communities. Residents did voice concerns over pesticide and fertilizer pollution/runoff.

HEALTH CARE

With regards to health care services, residents in Collier County voiced concerns related to primary care provider (PCP) availability and wait times (especially during peak season and for Medicare/Medicaid recipients). The lack of PCP providers is of particular concern in the Immokalee area. While there is a sufficient supply of dental care providers, residents are concerned with the affordability of services.

Residents are also worried about the lack of both mental health care and addiction treatment availability. Though the number of providers has increased in recent years, gaps in services remain, especially with respect to affordable assisted living options for residents with mental health issues. Community members felt that income determined both the access and quality of care one receives. Some residents voiced concerns regarding discrimination they experienced firsthand within the healthcare system. Undocumented workers in agricultural areas are particularly concerned about access to services given the current political climate surrounding immigration.

EDUCATION AND OTHER SOCIAL SERVICES

In general, parents were very satisfied with the quality of educational options. They felt that the available preschool and K-12 education programs are of high quality. However, parents in many areas of the county cited a lack of affordable child care and preschool options, indicating that the quality options are out of their budget. Additionally, residents cited that post-secondary options, including vocational training, were an area of need. In some instances, residents were aware of existing opportunities, but could not take advantage of them due to transportation issues. Immokalee residents were concerned with the lack of capacity in quality preschool and afterschool programs. Many residents in these areas turn to unlicensed providers for this care if quality programs are unavailable. Residents in Immokalee were also concerned with high teacher turnover, especially in the middle schools. With respect to elder care, additional affordable assisted living facilities are needed to support and increasing elderly population. Residents in Copeland, Chokoloskee, Everglades City, Goodland and Immokalee pointed to a lack of social services for elderly residents.

WELL-BEING AND COMMUNITY COHESION

Residents in Collier believe themselves to be mostly healthy, and the region exhibits a higher well-being score than that of the state. Southwest Florida is a participant in the Blue Zones Project, "a community-wide well-being improvement initiative" designed to "help make healthy choices easier" for Southwest Florida residents. As a result of these efforts, the well-being index in Southwest Florida has been increasing despite a reverse trend throughout the nation as a whole.

HEALTH AND HEALTHY BEHAVIORS

Generally, residents who do struggle with their health tend to have issues with chronic illness, substance abuse and obesity. Regarding alcohol and drug abuse, it is estimated that about one-fifth of residents in Collier engaged in heavy drinking and a larger proportion of residents age 65 and over engage in these types of behaviors than the state. Approximately 67% of respondents agreed that residents in their community are generally more healthy. About half of participants indicated that residents struggled with alcohol use, illegal drug use, and prescription drug abuse in their communities. All the aforementioned health issues are of greater concern in the Immokalee area.

RECREATION AND LEISURE

Community residents believe that they have adequate access to parks (84%), adequate access to beaches (81%), and adequate availability of arts/cultural programming (76%). Residents expressed concerns related to the affordability of recreational options. In general, Immokalee residents are more likely to disagree with statements regarding access to recreational activities.

SAFETY

Collier County residents believe their communities to be largely safe and indicated that they were satisfied with emergency services. Residents are concerned with safety of pedestrians and bike riders, lack of lighting at night for drivers, and texting and driving, though 73% of residents felt safe driving. Again, Immokalee residents are more concerned with their safety than are most residents in Collier County. While residents seem to be aware of the many opportunities for recreation that exist in the community, many residents likely struggle with affordability and access to these activities.

INTRODUCTION

Founded in 2004, the Richard M. Schulze Family Foundation (RMSFF) strongly believes that a good education, a strong family, and a strong work ethic are key for children and their future. Committed to the families in Collier County, Florida, the RMSFF provides funding to service providers and nonprofit organizations that focus on human and social services, education, and health and medicine. In an attempt to better understand the needs and issues affecting the residents of Collier County, RMSFF contracted with Q-Q Research Consultants (Q-Q Research) to design and implement a Community Needs Assessment (CNA) for Collier County, Florida.

This CNA offers a portrait of Collier County and the needs of its residents by presenting data on demographic and socioeconomic characteristics, as well as an appraisal of the economic, physical, service, and social environments including the following ten domains: 1) Employment and Economic Opportunity, 2) Housing, 3) Transportation/Infrastructure, 4) Environment, 5) Health Care, 6) Education and other Social Services, 7) Well-being and Community Cohesion, 8) Health and Health Behaviors, 9) Recreation and Leisure, (including Culture & the Arts) and 10) Safety. While this report illustrates specific community needs that have an impact on residents' everyday lives, it also moves beyond specifics to provide a broader analysis regarding foundational issues that impact people's quality of life along with assets found within the county. The CNA captures conditions in the local environment that contribute to quality of life such as housing costs, access to health care, places for recreation, and physical safety.

The purpose of this CNA is to highlight the key issues faced by Collier residents in order to address three primary objectives:

1. Identify and quantify the conditions, needs, and assets of the community,
2. Analyze the access and delivery of resources to the county residents, and
3. Provide findings that will allow community leaders and members to develop priorities and strategies to address identified needs and gaps while utilizing and mobilizing existing resources.

The intended audiences are people working to address a variety of community issues, including community organizations and civic leaders. RMSFF looks forward to joining with various community stakeholders to work towards building a flourishing Collier County that can offer a quality life for all its residents.



REPORT FORMAT

The report is organized into four principal sections: Introduction, Methodological Approach, Collier County Snapshot, and Major Findings and Community Identified Priorities. The Introduction section provides a brief introduction to the primary goals and objectives of the CNA and describes the overall structure of the report. The Methodological Approach section contains key methodological details of the CNA, and the Collier County Snapshot provides both a physical description of Collier County, along with a demographic description of its residents. The Major Findings and Community Identified Priorities section presents the findings of the CNA organized into five primary sections (Employment and Economic Environment; Physical Environment; Service Environment; Social Environment; and Community Identified Priorities). These five sections are further divided into more focused topical subcategories (e.g, Housing,

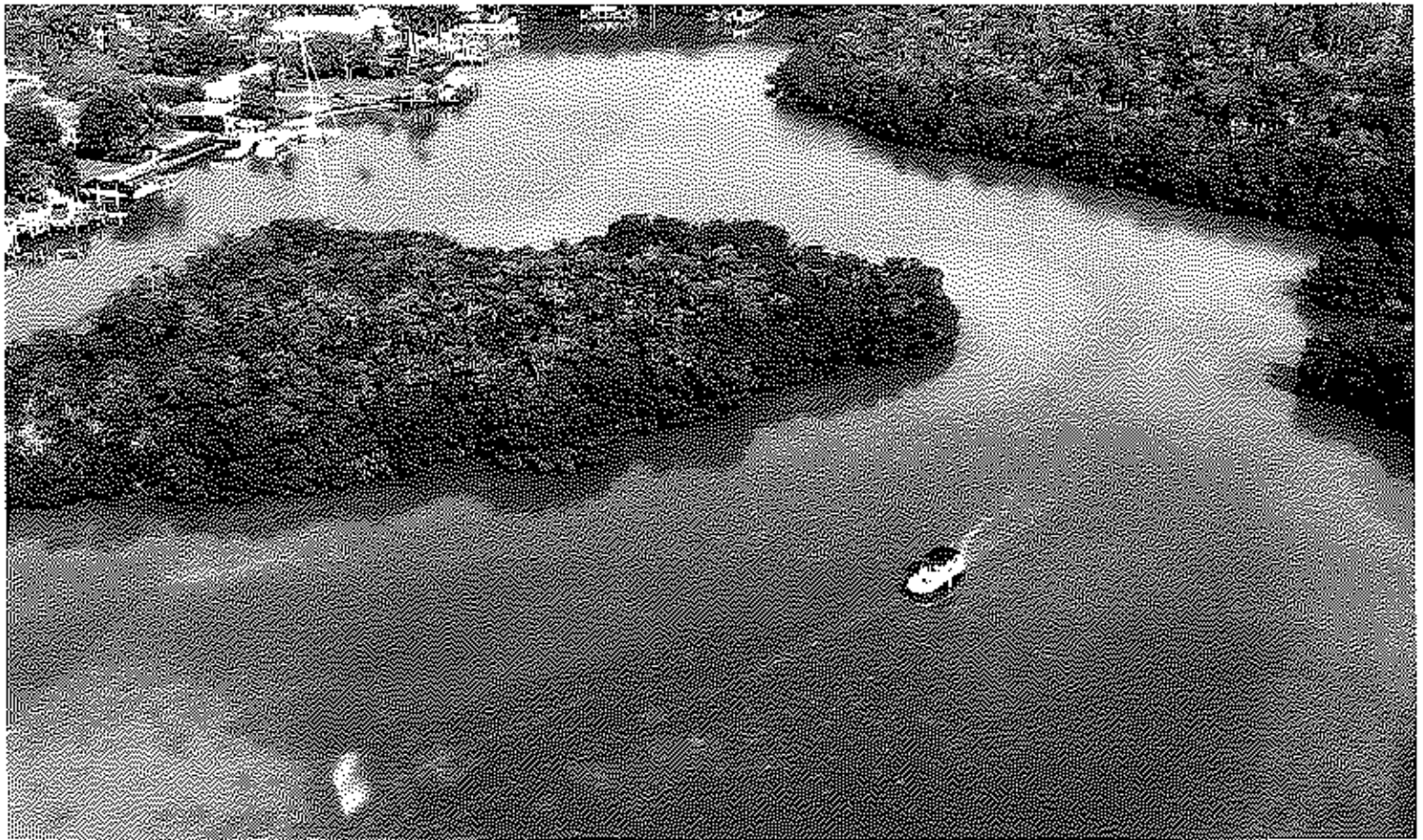
Environment, Transportation). Each subcategory presents data at the County level and features disparities among subgroups if warranted (usually by zip code or race/ethnicity, but occasionally by other subgroups). Not every disparity is discussed; just because a disparity is not mentioned does not mean that disparity is non-existent or not important to address. Decisions were made as to what to incorporate with respect to disparities based on perceived importance by community residents and stakeholders. Each subcategory section ends with “Key Points” that summarize central themes in order to help the reader make sense of the data.

ABOUT THE DATA

A significant portion of the data in this report comes from the Collier County Community Assessment Survey (CC-CAS). The CC-CAS was developed by the research team in consultation with the RMSFF Community Assessment Advisory Committee and administered to those who live and work in Collier County. Additionally, qualitative data was captured from 6 expert-led focus groups facilitated by the research team, along with 16 volunteer led focus groups. Altogether, the focus groups were attended by 122 residents and experts. Supplementary data sources were included as well, through the assessment of 37 prior reports. Preliminary results were presented to the CNA advisory board and to a selected group of residents in a focus group format for feedback and recommendations prior to final analyses. For ease of reading, the source and year are included in the text when the time frame is necessary for understanding the data. Additionally, data was rounded to improve readability. After a thorough review of all available data sources through various analytic approaches, it was noted that in general, findings were consistent across informants and sources. When multiple data sources from varied approaches yield similar results, confidence in the accuracy and strength of the findings is increased.¹

DISAGGREGATION OF DATA BY SMALLER GEOGRAPHIC REGIONS AND COMMUNITY SUBGROUPS

Most of the data presented in this CNA are presented at the Collier County level or are disaggregated by zip code. Summaries focusing in more detail on the community priorities disaggregated by zip code are included when available. In addition, brief summaries that address the community priorities of unique populations have been included. Occasionally data are disaggregated by Planning Community, distinct regions used by County agencies in the development planning throughout the county. Finally, the current CNA takes a look at resident needs and priorities by race/ethnicity and socioeconomic status to determine if certain groups are at an advantage or at risk, or have better or worse access to resources. Such an analysis is essential for prioritizing the provision of assistance efforts aimed at reducing and eliminating disparities among particular subgroup populations.



METHODOLOGICAL APPROACH

In order to meet the key objectives of this CNA project, a comprehensive mixed-methods design was adopted utilizing methods to collect qualitative and quantitative data from both primary and secondary sources. Quantitative data was captured from the CC-CAS. Qualitative data was obtained from both expert-panel focus groups which were facilitated by the research team, and from volunteer led focus groups who were facilitated by trained volunteers. In addition to this, a series of secondary data sources were analyzed in order to leverage existing information. The procedures and methodology employed for data collection using each assessment method are described in the sections that follow.

To identify the primary foci of the CNA, and to gain a clearer understanding of stakeholder requirements for the needs assessment process, the research team facilitated a visioning session with the RMSFF Community Assessment Advisory Committee. The session was interactive, which allowed the committee to share their opinions related to the goals of the CNA. Results from this visioning session guided Q-Q Research in developing key questions, and in defining the scope of the project to include an appraisal of the following ten domains: 1) Employment and Economic Opportunity, 2) Housing, 3) Transportation/Infrastructure, 4) Environment, 5) Health Care, 6) Education and other Social Services, 7) Well-being and Community Cohesion, 8) Health and Health Behaviors, 9) Recreation and Leisure (including Culture & the Arts) and 10) Safety. Stakeholder participants identified the above as being most important for the current assessment. In addition, participants suggested several subgroups of residents as populations of interest including citizens that identified as low-income, rural, migrant workers, permanent, transient, elderly, and mothers of young children. Guiding documents provided to the Advisory Committee are attached to this report in Appendix A.

COMMUNITY ENGAGEMENT: PRIMARY DATA

GOALS

The goals of the community engagement component of the CNA were to:

1. Identify the needs of all types of residents within Collier County, including those of special and vulnerable populations;
2. Identify assets found within Collier County;
3. Obtain data on populations for which we have little quantitative or qualitative data; and
4. Build relationships between the community and RMSFF.

The CNA utilized a community-based participatory approach allowing for feedback and input throughout all stages of the CNA implementation. This approach empowered stakeholders to voice their experience regarding the needs of the community and ensured that the research team was in alignment with the vision and purpose of the assessment.

RMSFF and the research team worked with community partners and volunteers to collect survey data and host focus group meetings with target populations. Target populations were selected in consultation with RMSFF based on the following factors: 1) the population has known needs or disparities, 2) more information regarding the needs of the particular population was needed, and 3) the population was available through outreach involving an existing community group/agency. All data collection was facilitated in the last half of 2017. Successful community engagement would not have been possible without the contributions of several community partners.

COMMUNITY SURVEYS

The research team developed the CC-CAS using structured and open-ended questions that aimed to gather the needs of the community. In order to quantify resident attitudes and perceptions regarding their needs, questions were created using the information provided by stakeholders during the initial visioning session. The survey consisted of four sections. The first section asked residents to agree or disagree with statements regarding the existence of needs and services in their neighborhood related to the domains specified above using a 4-point Likert scale. The second section asked residents to rate their satisfaction using a variety of community services available to them also using a 4-point Likert scale. The third section asked two open ended questions allowing residents to comment on what they believe is their community's greatest need and their community's greatest strength. Finally, the fourth section asked demographic questions that allowed the research team to make comparisons across different population subgroups. The CC-CAS survey is presented for review in Appendix B.

The final approved CC-CAS survey was made available to Collier County residents in two formats: online and paper-and-pencil. Any community member who works or resides in Collier County wishing to complete the survey online was able to do so. Participants were targeted using a stratified convenience sampling approach using quota method, sampling by zip code. Specifics regarding sampling strategy are presented in Appendix B. The research team worked with RMSFF staff to develop a comprehensive list of locations in each zip code in order to determine preferred locations for paper-and-pencil survey distribution. The research team trained several volunteers recruited by RMSFF to collect survey data. These volunteers engaged residents in various locations to reach community members who may not have access to, or feel comfortable with, an online version of the survey. Data collection began in July 2017 and ran through December 2017.

In total, 4,175 surveys were collected from people who live and work in Collier County. Participants came from a variety of backgrounds. The ethnic groups with the largest representation were Caucasian (53%), Hispanic/Latino (17%), and African American (4%). Other self-reported ethnicities included Asian and Native American. Twenty-three percent of respondents declined to report ethnicity. Twenty-six percent of participants were over 60 years of age. Approximately 28% of participants are parents of children under 18. Fourteen percent of participants earned less than \$25,000 per year and 23% earned more than \$100,000. The majority of participants were female (66%). Additional details regarding survey sample demographics are available in Appendix C.

EXPERT LED FOCUS GROUPS

Six selected focus groups were led by expert researchers (referred to as expert-led focus groups throughout the report) to explore particular themes and issues along with the needs of unique populations more in depth. The following themes were identified by the RMFSS Assessment Advisory Committee for in-depth analysis via expert-led focus groups: Environment, Housing, Health Care, and Transportation/Infrastructure. Additionally, expert-led focus groups were conducted with residents from the Immokalee and Haitian communities. Each group included 7 to 10 participants identified by RMSFF staff. Participants were chosen due to their knowledge of the chosen topic (e.g., housing, safety) or because they represent a stakeholder group in the community (e.g., older adults, parents of young families). Questions for the focus groups were informed by the quantitative survey topics. The guides for the expert-led focus groups are presented in Appendix D.



All expert-led focus group meetings were facilitated by the Q-Q Research team. Focus groups were recorded and transcribed to ensure that information obtained was of high quality. Participants were asked to identify the main issues related to each topic and who was most affected by these issues. Participants were also asked what areas of the county were most impacted by each problem and what actions were being taken to address these concerns. Specific information regarding the composition of the expert-led focus group participants is available in Appendix D. Qualitative summaries of expert-led focus group findings are available in Appendix E.

VOLUNTEER LED FOCUS GROUPS

In addition to the expert-led focus groups described above, 16 additional focus groups were led by a group of selected volunteers (referred to as volunteer-led focus groups throughout the report) to gather additional qualitative data on Collier County needs and assets at the zip code level and from special population groups. The volunteer-led focus groups included a total of 122 participants. The RMSFF staff identified participants and convened the focus groups. The research team developed focus group guides and trained the volunteers to facilitate the groups to ensure the standardization of delivery. A description of the trainings is described in Appendix F. Ten focus groups were conducted in the following zip codes: 34116, 34114, 34113, 34109, 34105, 34103, 34108, 34102, 34145, 34139, and 34119. A total of 68 residents participated. Six focus groups were conducted with the following special population groups: persons with developmental disabilities, young professionals, seniors, single mothers, members of the Seminole tribe, and a group made up of teachers, first responders, and police. A total of 54 residents participated. Specific information regarding the demographics of volunteer led focus group participants is available in Appendix F. Qualitative summaries of volunteer-led focus groups disaggregated by zip code and special population are available in Appendix G.

ASSESSMENT OF PRIOR REPORTS: SECONDARY DATA

An assortment of reports and assessments addressing issues of concern in the current CNA have been completed by various agencies and community partners within Collier County. As such, we conducted a review of the existing body of research and reports to guarantee a more robust and comprehensive analysis. Many of the identified existing reports were provided by the RMSFF through cooperation with community partners and county agencies. Others were gathered through secondary research methods such as internet and database searches.

Reports in the analysis were included if they met the following selection criteria:

1. They included primary data collected from original sources within Collier County or if they included secondary data specific to Collier County,
2. The data was collected in 2010 or later,
3. The methods of data collection were discussed, and
4. The foci of the report included one of the primary identified domains examined in the current needs assessment.

In May of 2017, the Q-Q Research team was provided 38 reports for possible inclusion in the assessment of prior reports. Data extraction and analysis included motivations for the reports, the identification of community needs, as well as a depiction of the populations included. The assessment of prior reports included existing assessments which engaged community partners and citizens, representing a comprehensive range of Collier County residents. Twenty-eight of these documents met our established inclusion criteria stated above.

Document review was performed by Q-Q Research staff members. All reports were reviewed using the document review checklist provided in Appendix H. A list of all documents reviewed is provided in Appendix I. If a report met the aforementioned inclusionary criteria, a document review summary was completed in full. For each report that met the inclusion criteria a data extraction form was completed.

LIMITATIONS

There are a few methodological matters that should be noted. The CC-CAS survey data displayed in this report represent raw/actual respondent data. Consequently, among the limitations of the survey are the self-reported nature of the data. The quota sampling strategies used allowed for reliable conclusions to be made regarding the needs of the county residents overall and with regard to comparisons at the zip code level. Sample size limitations may have affected the reliability of estimates for some of the subgroup analyses with specific populations. As reports were identified by working with RMSFF staff and through database and internet searches, it is expected that not all eligible community reports and assessments were included in the document review. This assessment of prior reports includes all biases and limitations that were fundamentally a part of the included prior reports to begin with, along with those introduced by the current methodology. As such, findings should be interpreted with care and in light of these methodological matters.

Finally, it is important to note that the CNA plan was developed in the Summer of 2017 with the input of RMSFF staff as described above. In September of 2017, Collier County was hit by Hurricane Irma, which severely impacted the region. An addendum was added to the CC-CAS survey to assess the impact of the Hurricane on residents. A brief description of those survey results is provided in Appendix J. Most surveys and all focus groups were conducted after the Hurricane came through the area. Some of the hurricane impact is reported in the results that follow, though it was not entirely possible to alter the CNA plan to have captured the full extent of the impact. The full impact of Irma is beyond the scope of this report.

COMMUNITY NEED IDENTIFICATION

In order to determine the most appropriate way to organize the vast amount of data gathered from the multitude of sources described above, the research team engaged in small group discussions about the data and developed a consensus on the most prominent needs of the community along with foundational issues.

Through this process, needs were identified across the ten original domains and organized into the following groups: Employment and Economic Environment, Physical Environment (e.g., Housing, Environment, Public Space and Growth Management, Transportation), Service Environment (e.g., Health Care, Education and Social Services), Social Environment, and Health and Well Being (e.g., Health and Health Behaviors, Safety, Recreation/Leisure). Additionally, community priorities and foundational issues were identified. Foundational issues are needs which affect residents across multiple domains and must be addressed to improve quality of life in Collier County.

Data describing the most prominent needs and foundational issues are discussed in the Major Findings and Community Identified Priorities section of the report that follows and in the appendices in greater detail. The key insights gleaned from this report can be used by stakeholders to make recommendations for collaborative action that include objectives and strategies to meet the needs of Collier County residents.



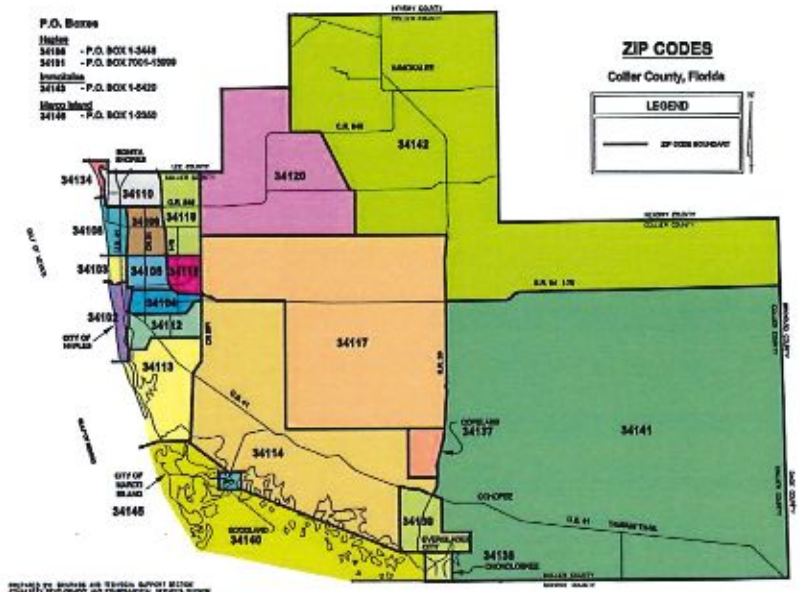
COLLIER COUNTY SNAPSHOT

Collier County, located on Southwest Florida's gulf coast, is the 16th most populous county in the State of Florida out of 67 counties. According to the U.S. Census Bureau, its 2016 estimated population is 365,136 residents, comprising roughly 1.8% of the state of Florida's total population of approximately 20 million.² In addition, the County estimates an additional 65,000 to 73,000 residents reside within the area annually during what is known as peak season (October to April/May).³

Collier County encompasses 2,305 square miles and is the largest county by land area (1,998 square miles) in the State of Florida. Much of the southeastern segment of Collier County is contained within Big Cypress National Preserve, designated to safeguard approximately 700,000 acres of swamplands in South Florida. In addition, the southern coastal segment of the county is contained within the Everglades National Park, designated to protect the southern portions of the Everglades wetlands.

The County offers a diversity of landscapes within its 3 municipalities (Naples, Everglades City and Marco Island) and several unincorporated communities. Communities range from densely populated coastal urban/suburban neighborhoods to the sparsely populated rural/agricultural communities located about 30 to 45 miles inland. See Map 1 for a visual presentation of zip codes in Collier County.

Map 1. Zip Codes: Collier County, Florida



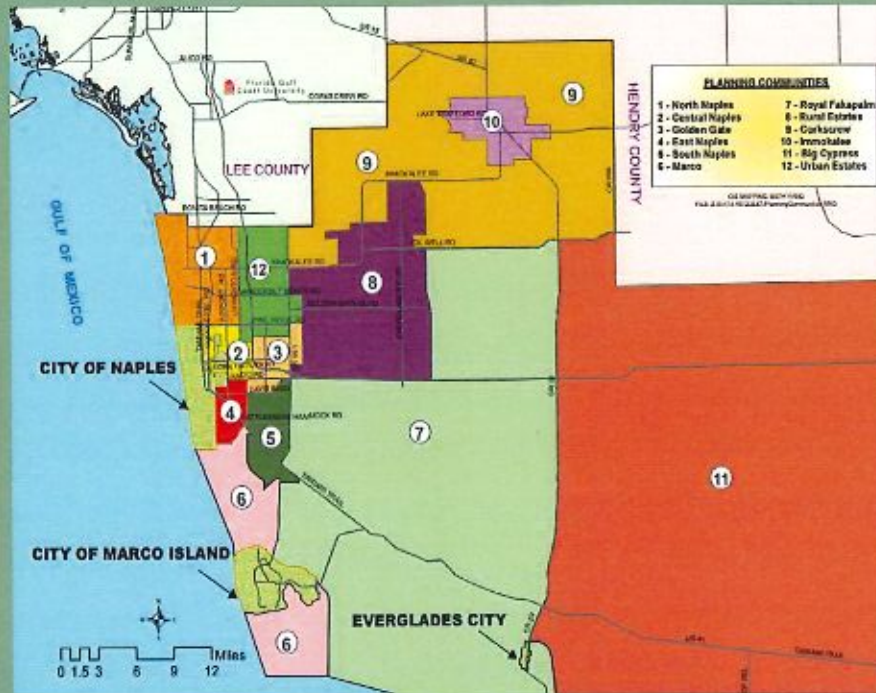
Reprinted from: Community Development and Environmental Services Division, Collier County, FL. (2005). Retrieved from: <http://www.colliercountyfl.gov>.



COLLIER COUNTY'S PLANNING COMMUNITIES

Collier County has divided the region into 12 geographic areas called Planning Communities (PC) (Map 2). These distinct regions are used by County agencies in the development planning throughout the county (Map 3).

Map 2. Planning Communities Collier County Florida



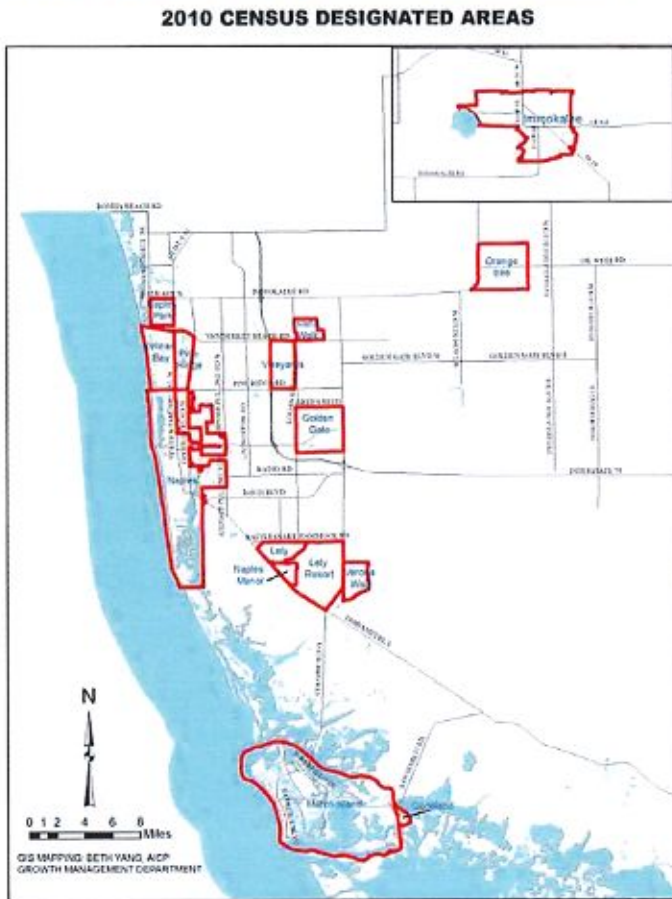
Reprinted from: Collier County Comprehensive Planning Section,
Collier County, FL. (2011).
Retrieved from: <http://www.colliercountyfl.gov>.

Urban Planning Communities: 1 through 6, 10, and 12 are located in the western parts of the county and include the cities of Naples and Marco Island. These planning communities are located mostly west of State Road 951 (i.e., Collier Boulevard) and contain North, Central, East, and South Naples, Golden Gate, Marco, and Urban Estates. Zip codes 34101 through 34113, 34116, 34119 and 34145 are located within these urban areas. The majority of land in these planning communities is zoned as urban and contains land marked for estate or residential development, and planned unit developments. The Naples Census County Division (CCD) encompasses several Census Designated Places (CDPs) including the communities of Golden Gate, Island Walk, Lely, Lely Resort, Naples City, Naples Manor, Naples Park, Pelican Bay, Pine Ridge and the Vineyards. The Marco Island CCD encompasses parts of Marco Island City and Goodland. In addition, east of State Road 951, and contained within the boundaries the rural planning community of Corkscrew, is the planning community (and CDP) of Immokalee, otherwise known as the epicenter of the county's agricultural industry. Most of the agricultural workers and migrant workers reside within its boundaries. The Immokalee CCD includes the Immokalee and Orangtree CDPs. See Map 2 for a visual description of CDPs.



Urban Planning Communities: 7, 8, 9, and 11 are located inland in the eastern parts of the county and include Everglades City. These planning communities are located mostly east of State Road 951 (i.e., Collier Boulevard) and contain Royal Fakapalm, Rural Estates, Corkscrew, and Big Cypress. Zip codes 34137 through 34142, 34114, 34117, and 34120 are located within these rural areas. Rural Estates and Royal Fakapalm are made up of residential regions to the west (closer to the coastal areas) and agricultural/conservation areas to the East and South. The Everglades CCD is contained within this area and is comprised of the CDPs of Chokoloskee, Plantation Island, Verona Walk, and Everglades City. Corkscrew is at the northeastern end of the county and is mostly agricultural land. Finally, Big Cypress is mostly a conservation area and part of Big Cypress National Preserve.

Map 3. 2010 Census Designated Areas in Collier County



According to the 2011 Collier County Evaluation and Appraisal Report (EAR), development in most of the urbanized areas of Collier County was at or past the 60% developed stage with the exception of Immokalee (below 30%) and Marco Island (below 10%).⁴ According to the EAR, the County's master plan allowed for major urbanized areas (within the urban planning communities) to establish infrastructure and services in areas which were anticipated to have the most growth. It is anticipated that several of the urban areas within the county will be further developed by the end of the decade. Also noted in the 2011 EAR Report is the considerable growth rate experienced by the Rural Estates planning community when compared to the other rural planning communities. As such, there is a great need for creating services and employment opportunity growth within close proximity to areas that experienced recent residential growth. The population estimates in Collier as of 2017 (Figure 1) reflect that this trend has continued to develop as approximately 90% of the population is located within the urban planning zones.

Reprinted from: The Collier County Economic, Demographic & Community Profile Growth Management Department Comprehensive Planning Section. (2016).

Retrieved from: <http://www.colliercountyfl.gov>

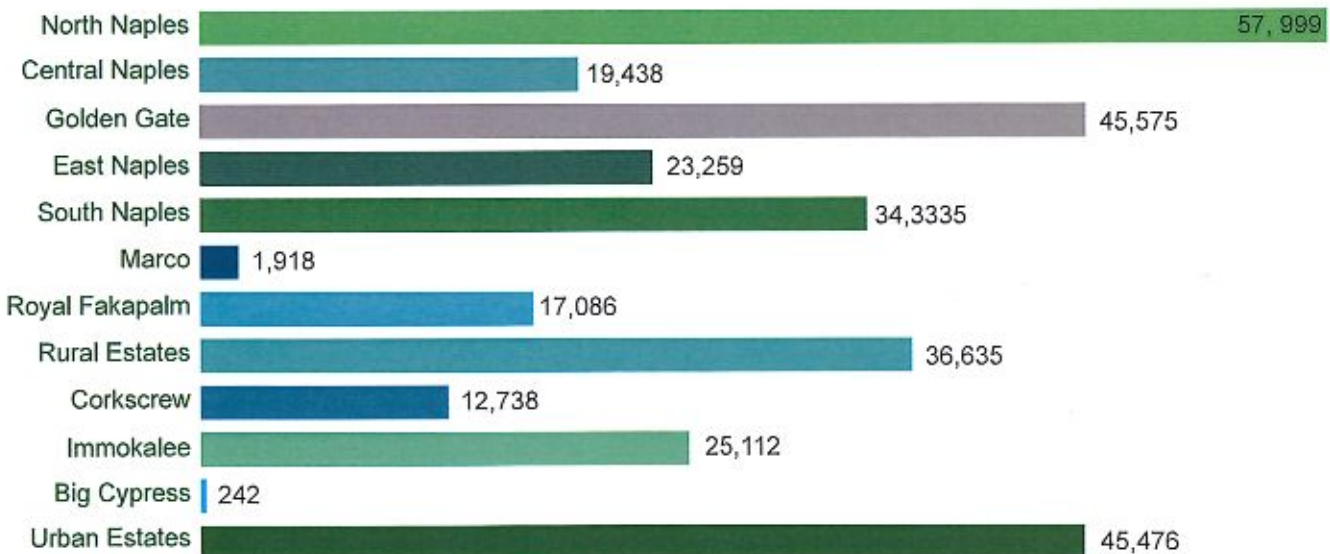


Figure 1. Collier County Population by Planning Community: 2017 Estimates
 Source: Collier County Comprehensive Planning Section. (2016).
 Retrieved from: <http://www.colliercountyfl.gov>

COLLIER COUNTY'S POPULATION DATA

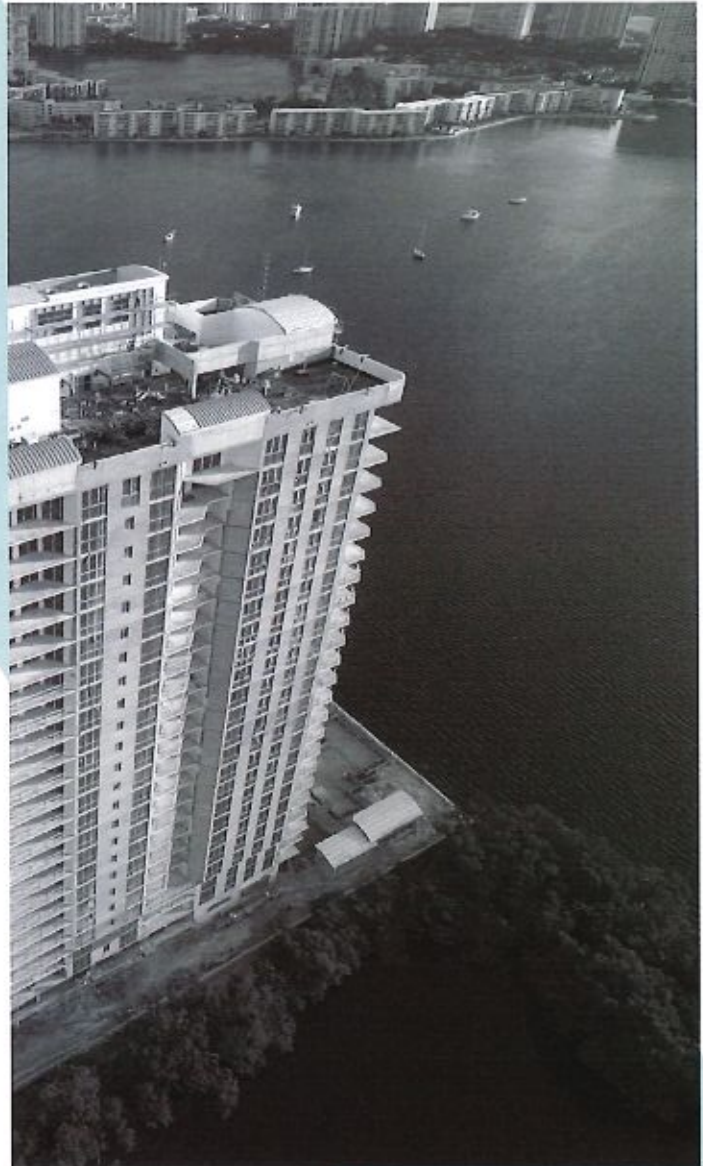
Between 2010 and 2016 the population in Collier County grew by 12.9% to 365,136, out pacing population growth in Florida (9.2%).⁵ Collier is the 16th most populous county in State and by 2030, Collier County's population is expected to increase over 20% to approximately 441,995.⁶ All population data discussed in the following sections was obtained from the 2012-16 American Community Survey 5-year estimates unless otherwise noted. All data regarding population projections was obtained from the University of Florida's Bureau for Economic and Business Research.

AGE, SEX, AND OTHER CHARACTERISTICS

One of the most important population demographic characteristics to consider when planning for a community's need is the age of its residents. For example, a population in which the demographic shift shows an aging population may have increasing demands for health-care systems and service needs as the population continues to age. Conversely, a population in which the demographic shifts show an influx of younger residents may have increasing demands for education and child care services.

The population of Collier County is considerably older than that of the State of Florida (Figure 2). The median age of the residents of Collier County was 49.2 years in 2016, while the median age of residents in the State of Florida was 41.6 years.⁷ Collier is the 9th ranked county in Florida by percent of population ages 65 and over.⁸

Approximately 5% the population is under the age of 5, while 13.5% are between the ages of 5 and 17 (19.5% under 18). About 21.7% of the population are between the ages of 18 and 39. Sixty percent of Collier residents are over 40 years of age and about 29.6% are over the age of 65. The median age of the residents over 65 is 74.5 years old.



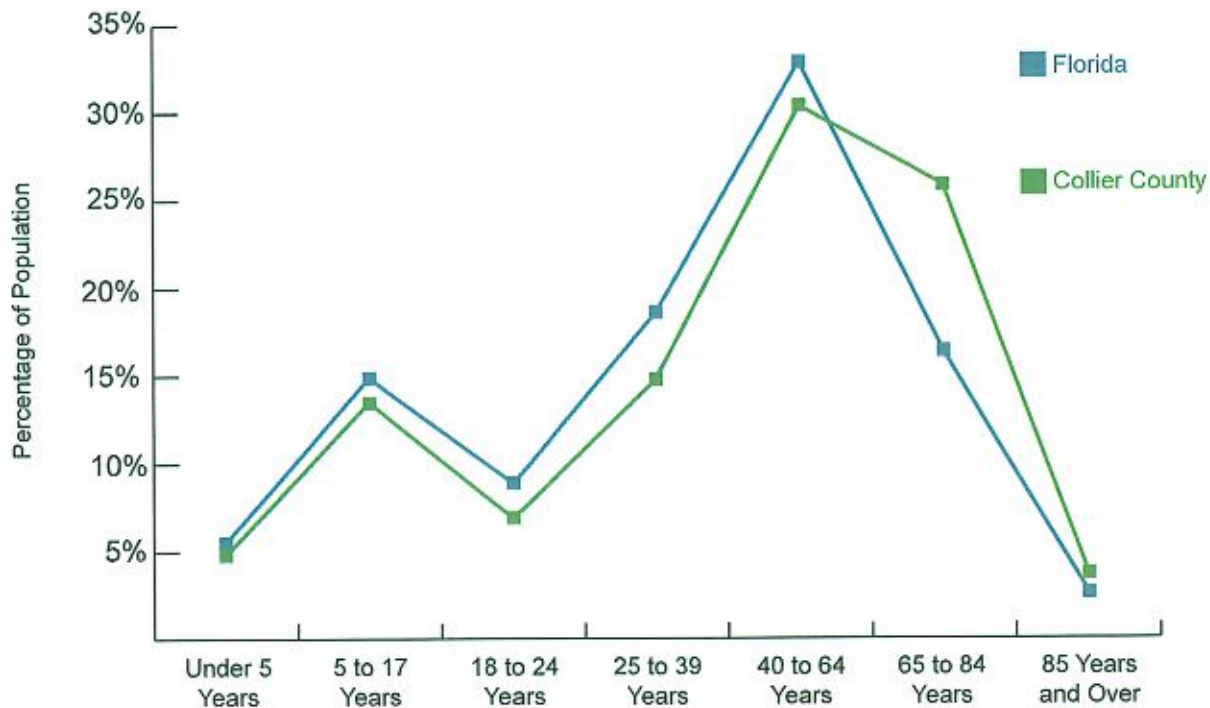


Figure 2. Population by Age Groups: Collier County vs. Florida
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

The gender distribution in the County reflects that of Florida and the US as whole, with approximately 51% of the population being female and 49% being male.⁹ Of note is that the gender distribution varies with respect to age (Figure 3). For residents under 40, males comprise a slightly higher percentage of the population than females (52% vs 48%), while for residents over 40, females comprise a slightly higher percentage of the population than males (52% vs 48%).

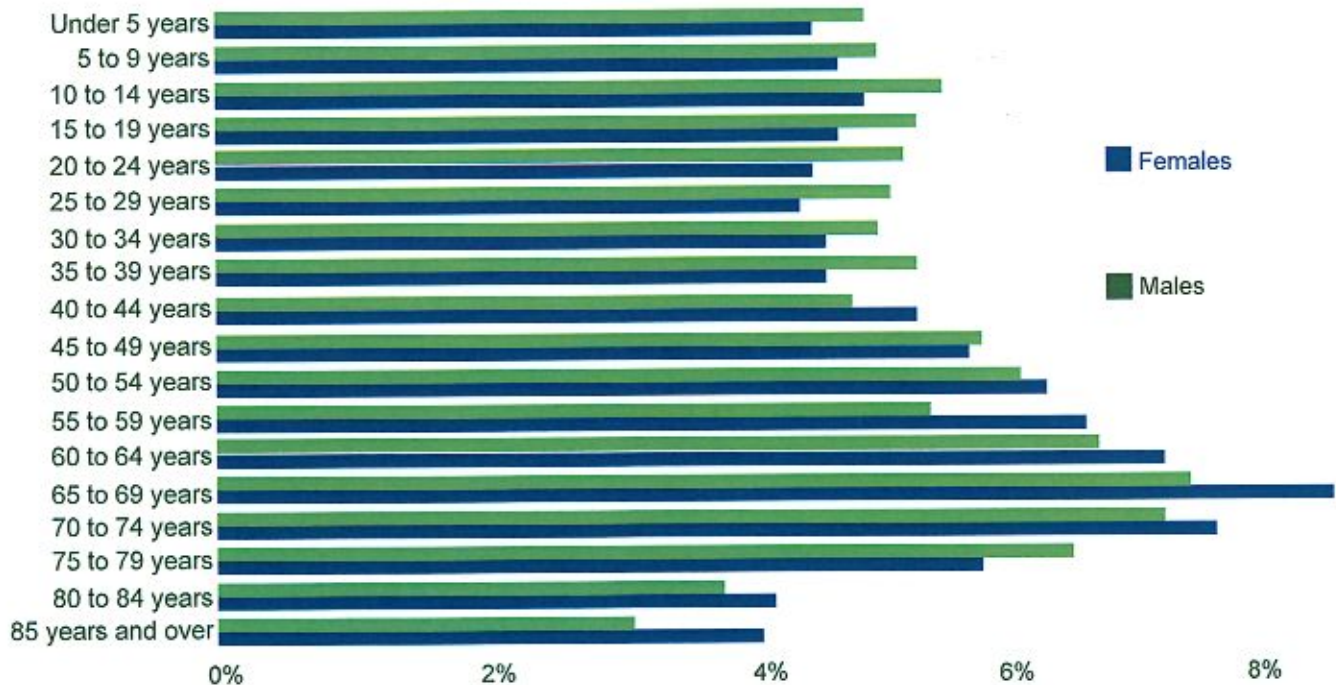


Figure 3. Population by Age Groups: Collier County Florida
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

DEMOGRAPHIC SHIFTS

The greatest population growth in Collier is expected to be among the 65-plus age group (Figure 4).¹⁰ The percentage of residents age 65-plus is expected to increase from 26.4% of the total population in 2010 to 32.5% in 2030 and 33.5% in 2040, with the majority of this increase among people age 80-plus. In comparison, the percentage of residents 65-plus in Florida is expected to increase from 17.3% to 25.5% by 2040. At the state and national levels, the percentage of population 65 years and over has also increased. When compared to the state, Collier county has a lower percentage of population under 18 years, but a higher percentage of population 65 years and over. At the same time, population projections suggest that the percentage of working-age residents (ages 25-64 years) will decrease from 47.2% of the total population in 2010 to 43.1% in 2030 and 42.4% in 2040.

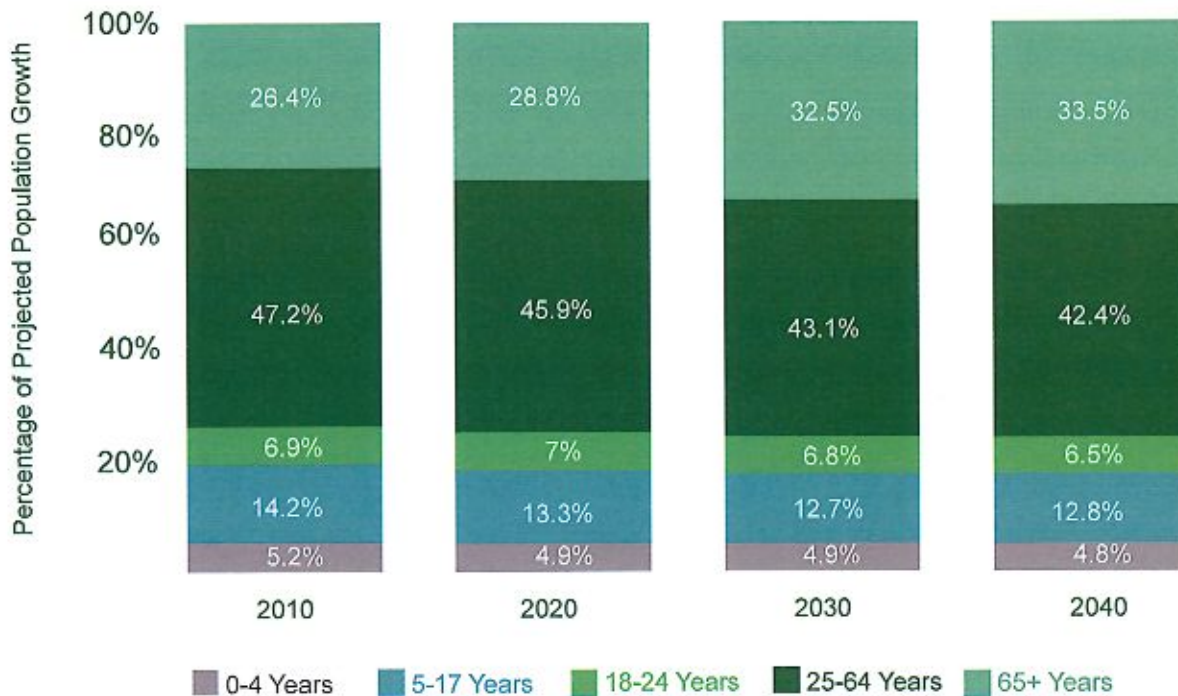


Figure 4: Collier County Projected Population Growth by Age
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

HOUSEHOLDS WITH CHILDREN OR SENIORS

Of the 63,314 children under 18 that reside in Collier County, approximately 64% were living in married parent households, with 36% of children residing in single parent households (25% being female led). The median income of a married parent household with children was estimated at \$69,127 while for a single-parent household it was estimated to be between \$36,730 and \$30,466. Roughly 29% of children are living in households that receive public assistance and 22% are living in households deemed to be below poverty level. Eighty-eight percent of children were enrolled in public schools.¹¹

Of the 10,342 residents that are age 65 and over, 57% live in married-couple family households whereas 35.8% are living alone.¹² Ninety percent of residents over the age of 65 hold at least a high school diploma and 13.7% are employed, making up approximately 5% of the labor force. The majority of these residents (91.7%) receive social security benefits, 46.4% receive additional retirement income, while only 7.2% are below the poverty level. Moreover, 21.4% of elderly residents are civilian veterans.

At the county, state, and national levels, the percentage of population under 18 years old has been declining while the percentage of population 65 years and over has been increasing (Figure 5). Compared to state and national levels, in 2016, Collier County has had the lowest percentage of population under 18 years, but the highest percentage of population 65 years and over.¹³



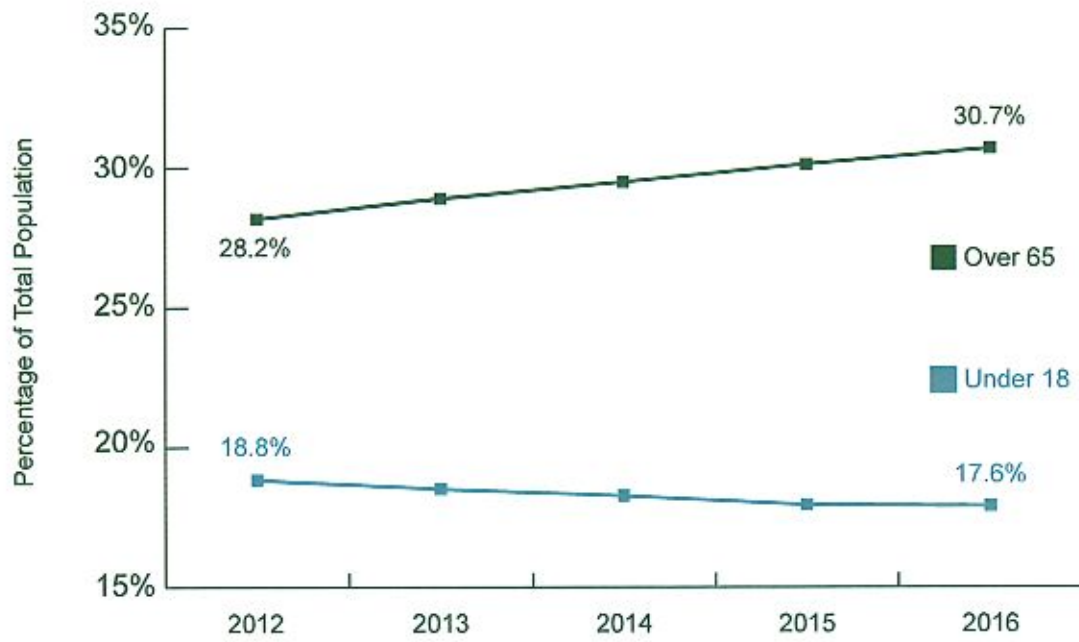


Figure 5 : Collier County Population by Age
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>



EDUCATION

Approximately 85.7% of Collier County adult residents are high school graduates while 33.9% hold Bachelor's degrees or higher. Males are more likely to have less than a high school diploma than females (16.2% vs. 13.4%) but are more likely to have a bachelor's degree or higher than females (37.8% vs 30.3%).¹⁴

RACE, ETHNICITY, AND LANGUAGE

Though Collier County's population is mostly White, the county has a very diverse population of residents which has implications for the needs of the community. About 87.9% of residents identify as White; 64.2% of residents identify as White only (non-Hispanic/Latino). Hispanic/Latinos (of any race) represent the largest minority group (26.6 %) followed by Black/African Americans (7.0%) (Table 1).¹⁵

Race	Total Population		Percentage of County Population	
	Number	Margin of Error	Percentage	Margin of Error
White	306,114	+/-1,902	87.9%	+/-0.5
Black/AA	24,300	+/-647	7.0%	+/-0.2
American Indian/Alaska Native	1,083	+/-293	0.3%	+/-0.1
Asian	4,480	+/-261	1.3%	+/-0.1
Other	8,297	+/-1,835	2.4%	+/-0.5
Two or More Races	3,962	+/-689	1.1%	+/-0.2
Ethnicity				
Hispanic/Latino (of any race)	9,751	**	26.6%	**
Mexican	39,224	+/-2,346	11.3%	+/-0.7
Puerto Rican	7,112	+/-1,357	2.0%	+/-0.4
Cuban	21,131	+/-1,860	6.1%	+/-0.5
Other	25,284	+/-2,308	7.3%	+/-0.7

Table 1. Race/Ethnicity and Population, Collier County
Source: ACS 2012-2016 5 year estimates
Retrieved from: <https://factfinder.census.gov>

The rates of diverse populations are steadily increasing in the county. The Hispanic/Latino population increased three-fold between 1990 and 2010 and the Black population increased two-fold during that same time.¹⁶ As the total population continues to grow, net changes within racial/ethnic groups will contribute to the county's changing demographics.

The current state of this trend is demonstrated by examining the ethno-racial composition of Collier County by age (see Figure 6 and Table 2). For the population ages 55 and up, White residents make up more than 75% of the residents, while for the population ages 44 and under, White residents make up less than half of the residents.

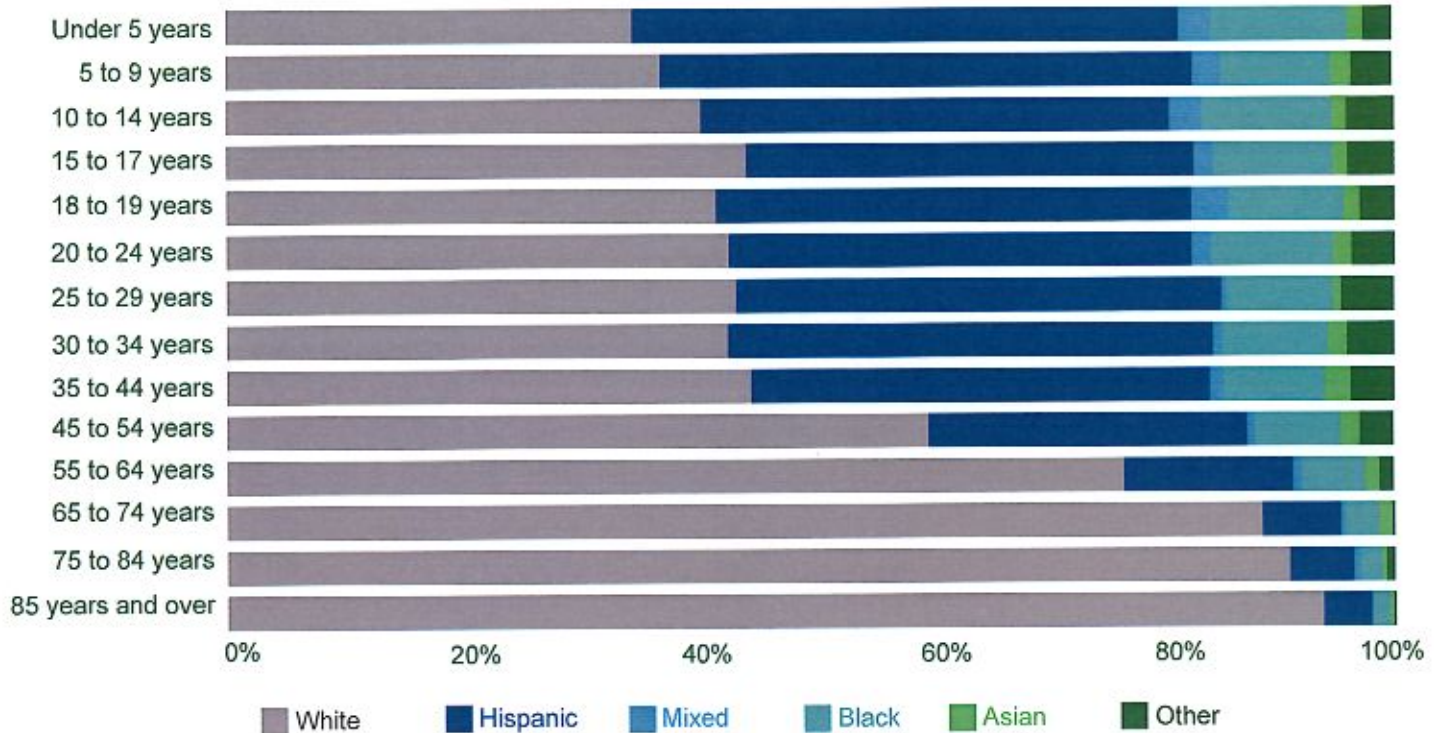


Figure 6. Collier County Ethnic/Racial Composition by Age
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

Age	White	Hispanic	Mixed	Black	Asian	Other
Under 5 years	34.7%	46.9%	2.8%	11.7%	1.3%	2.5%
5 to 9 years	37.1%	45.7%	2.4%	9.5%	1.7%	3.5%
10 to 14 years	40.6%	40.2%	2.8%	11.2%	1.2%	4.1%
15 to 17 years	44.5%	38.4%	1.7%	10.3%	1.2%	4.0%
18 and 19 years	41.9%	40.8%	3.2%	9.9%	1.3%	3.0%
20 to 24 years	43.0%	39.7%	1.7%	10.5%	1.5%	3.7%
25 to 29 years	43.6%	41.6%	0.5%	9.1%	0.7%	4.5%
30 to 34 years	42.9%	41.6%	0.8%	9.1%	1.6%	4.0%
35 to 44 years	44.9%	39.3%	1.2%	8.7%	2.2%	3.7%
45 to 54 years	60.1%	27.3%	0.7%	7.3%	1.6%	2.9%
55 to 64 years	76.8%	14.5%	0.8%	5.4%	1.2%	1.2%
65 to 74 years	88.7%	6.7%	0.4%	2.9%	1.1%	0.2%
75 to 84 years	91.0%	5.5%	0.6%	1.9%	0.3%	0.7%
85 years and over	93.9%	4.1%	0.1%	1.5%	0.3%	0.2%

Table 2. Collier County Ethnic/Racial Composition by Age
 Source: ACS 2012-2016 5 year Estimates
 Retrieved from: <https://factfinder.census.gov>

Growth in the number of Hispanic/Latino, Black and multi-ethnic residents is expected to continue its upward trend between now and 2040 (Figure 7).¹⁷ The White population will continue to grow in numbers, but will decrease as a percentage of the total county population. This ethno-racial growth trend is moving in parallel to the trend expected statewide.

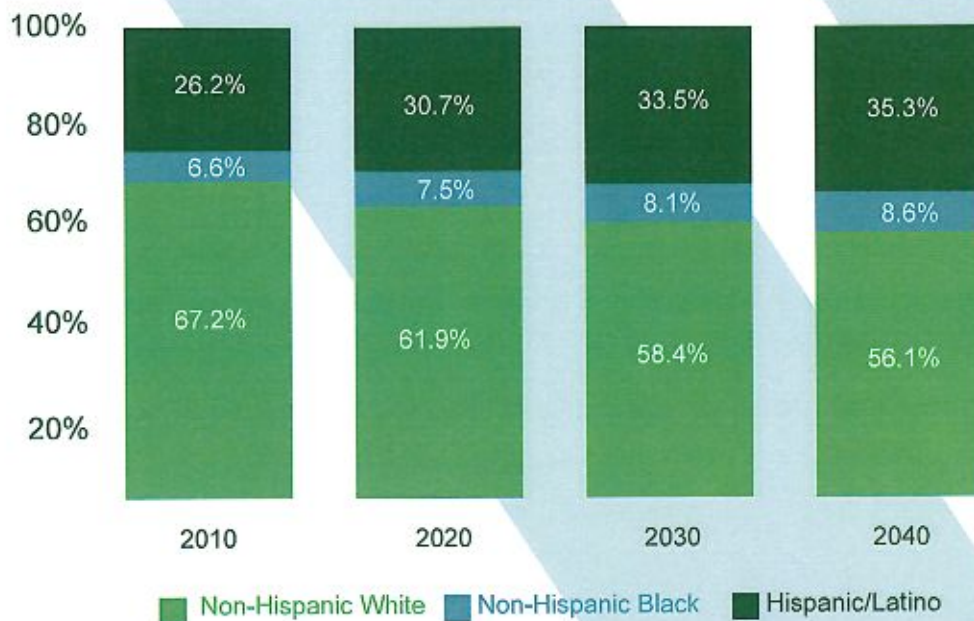


Figure 7. Projected Ethnic Composition by Percentage
 Source: Population Projections By Age, Sex, Race, and Hispanic Origin For Florida and Its Counties, 2020–2045, With Estimates for 2016 (2017).
 Retrieved from: <https://www.bebr.ufl.edu>

Higher concentrations of specific ethno-racial populations exist in various geographic locations throughout Collier County (Figure 8 and Table 3). These patterns are the product of a confluence of historical events and present-day occurrences that reveal both positive and negative life circumstances.

In Immokalee, Naples Manor, and Golden Gate, residents are predominantly minorities; Immokalee’s residents identify as primarily Black, while the primary minority groups in Naples Manor and Golden Gate are Hispanic/Latino. Approximately half of Orangetree residents identify as minority (55%), Lely Resort is one-third minority (33%), and Naples Park is approximately one-quarter minority (28%), with Lely Resorts residents identifying as primarily Black, while the primary minority groups in Orangetree and Naples Park are Hispanic/Latino. The remaining Census Designated Places and cities in Collier are less than 10% minority.¹⁸

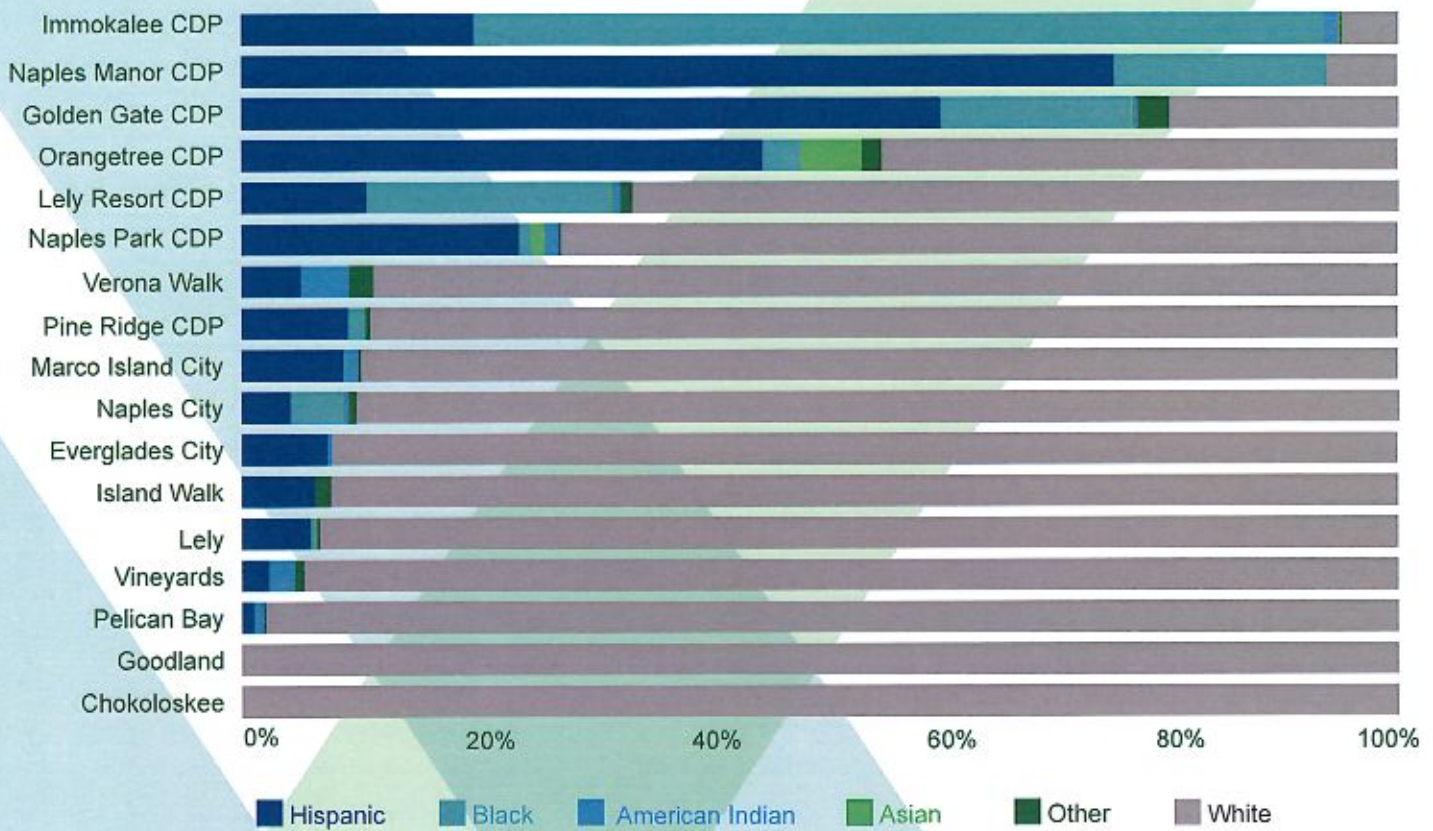


Figure 8. Minority Ethno-Racial Composition by Place, Collier County
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

Age	White	Hispanic	Black	American Indian	Asian	Other
Immokalee CDP	4.9%	20.0%	73.7%	1.2%	0.2%	0.1%
Naples Manor CDP	6.1%	75.5%	18.4%	0.0%	0.0%	0.0%
Golden Gate CDP	19.8%	60.5%	16.4%	0.2%	0.4%	2.8%
Orangetree CDP	44.6%	45.1%	3.3%	0.0%	5.3%	1.7%
Lely Resort CDP	66.4%	10.7%	21.1%	0.2%	0.7%	1.0%
Naples Park CDP	72.5%	23.9%	1.0%	1.2%	1.3%	0.1%
Verona Walk	88.7%	5.0%	0.0%	0.0%	4.2%	2.1%
Pine Ridge CDP	89.0%	9.1%	1.5%	0.0%	0.0%	0.4%
Marco Island City	89.8%	8.7%	0.2%	0.0%	1.1%	0.2%
Naples City	90.3%	4.1%	4.5%	0.1%	0.4%	0.7%
Everglades (City)	92.2%	7.3%	0.0%	0.0%	0.4%	0.0%
Island Walk	92.4%	6.2%	0.0%	0.0%	0.0%	1.4%
Lely	93.4%	5.8%	0.4%	0.2%	0.0%	0.2%
Vineyards	94.8%	2.2%	0.0%	0.0%	2.2%	0.8%
Pelican Bay	98.1%	0.9%	0.0%	0.0%	0.9%	0.1%
Goodland	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chokoloskee	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Table 3. Minority Ethno-Racial Composition by Place, Collier County
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>



SOCIOECONOMIC CHARACTERISTICS

According to the MIT Living Wage Calculator, the required annual income before taxes for a family of four (2 adults, 2 children) in Collier County is \$66,340.¹⁹ This estimate takes into account food, child-care, medical expenses, housing, transportation, taxes and the cost of living in the location. The living wage estimate is discussed in greater detail in Section IV of the report. The median household income in Collier County is \$59,783 (adjusted for inflation) and 53% of the eligible population is part of the labor force (the unemployment rate is 6.4%). More than a quarter of the population (27.5%) has a household income greater than six-figures (Figure 9).²⁰

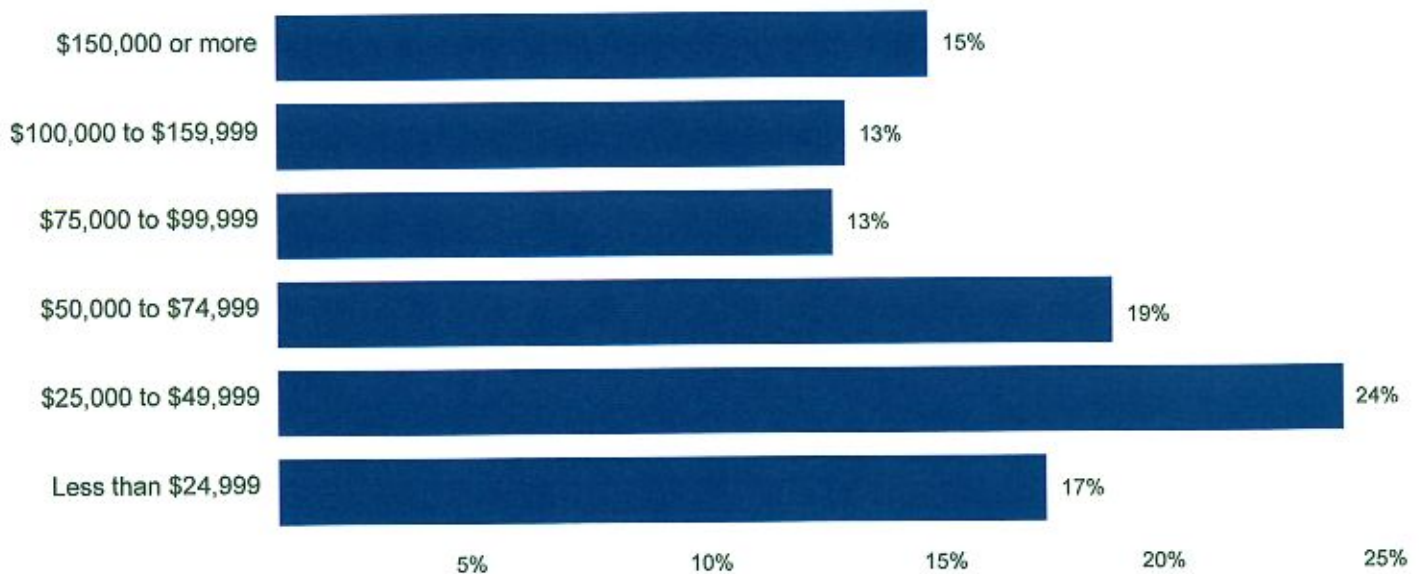


Figure 9. Household Income Brackets, Collier County
Source: ACS 2012-2016 5 year estimates
Retrieved from: <https://factfinder.census.gov>



The Federal Poverty Level (FPL) is commonly used measure to define poverty. The measure of income is issued annually by the Department of Health and Human Services (HHS) and is regularly used to establish eligibility for public and social services. In 2016, FPL was \$24,300 for a family of four.²¹ Thirteen percent of Collier County residents (8.3% of families) earn less than 100 percent of FPL. Twenty-two percent of children are living in households with income below the poverty level. Median income varies by CDP and City (Figure 10).²²

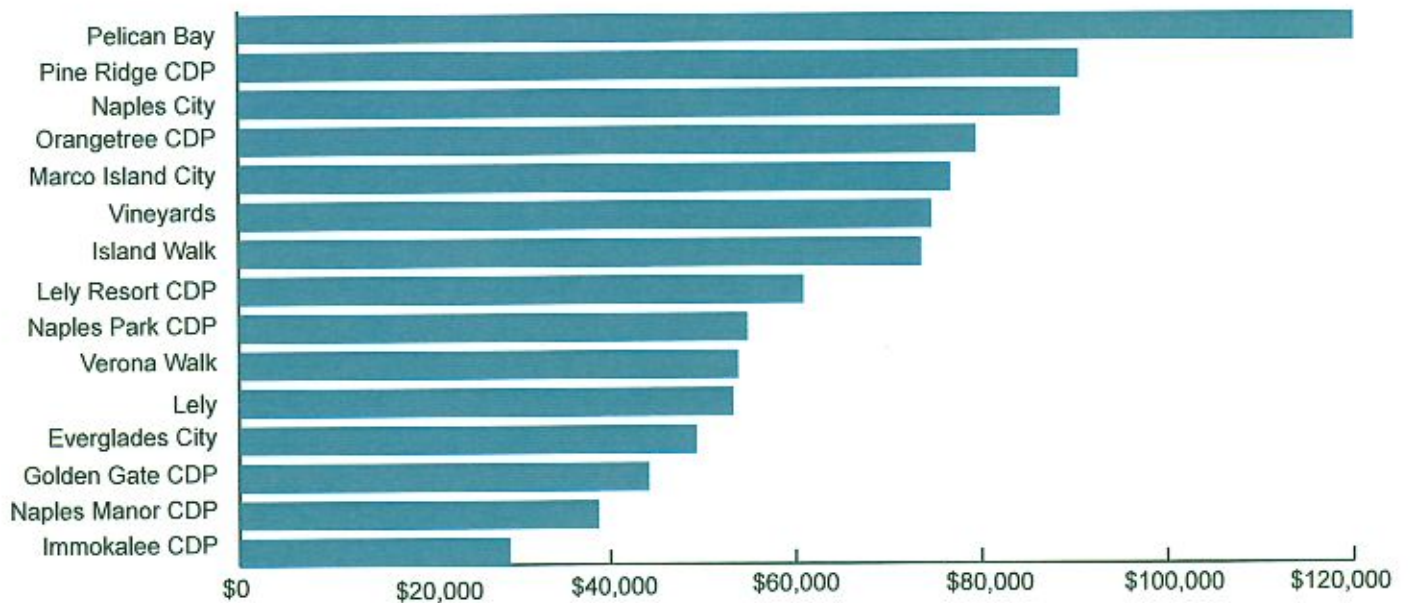


Figure 10. Household Income by Place and City, Collier County
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

KEY POINTS

Collier County is geographically broad and home to a **diverse and growing population**. There is an obvious need for organizations and agencies to provide services that adapt to meet community needs that vary across the diverse landscapes found throughout the County.

The County is becoming even more **ethnically and racially mixed**. By 2040, the population will be almost evenly split between majority and minority racial/ethnic groups.

The County's population is aging. Over the next decade, the need for **health and social services for an aging population** and demand for elderly care will increase.

There is a large income gap between the richest and poorest residents of the county. Large segments of the population earn six-figures (approximately 28%) while a considerable percentage (albeit a smaller percentage) live below the Federal Poverty Level (approximately 17%).



MAJOR FINDINGS AND COMMUNITY IDENTIFIED PRIORITIES

EMPLOYMENT AND ECONOMIC ENVIRONMENT

INTRODUCTION

Income, net worth, and assets are essential elements that influence a person's quality of life, their perception of their own happiness, and their expectancies related to aging.²³ Family income is correlated with a person's overall relationship satisfaction and has a direct impact on positive child development.²⁴ In fact, Americans with a household income of less than \$50,000 report being more likely to have trouble paying for housing, healthcare, and are more likely to delay retirement. They also report being less optimistic about both the present and the future. These effects operate in a stepwise fashion, with middle-class Americans being better off than the poorest Americans, but being worse off than the upper class, whose incomes are considerably higher.²⁵ Research illustrates that a community's employment and economic conditions have a significant impact on quality of life, health, and on the differences that exist among various groups.²⁶ When families are faced with challenging economic conditions that impede their ability to afford the basics, they are forced to cut costs, make tough decisions and take risks.²⁷

This section includes information on employment and the economic environment in Collier County including data related to household income and assets, cost of living, how people in Collier County are employed, the unemployment rate, and the labor market. The concerns shared by focus group participants and survey respondents related to these issues are presented in the analyses along with secondary data gleaned from prior reports.

DATA

INCOME AND ASSETS

The median household income in Collier County Florida is \$59,783, which is well above the state's average of \$49,698 (both estimates adjusted for inflation). The median household income estimate is comprised of all households in the County, and includes households with working and retired adults. In addition to income, ownership of assets often contributes to economic stability. In Collier County, fewer than 40% of residents own or have access to liquid assets (e.g., savings, retirement accounts, rental income).²⁸ These types of assets can be easily converted to cash to cover any financial emergencies that arise. Over 90% of Collier residents own at least one vehicle. Vehicles are not typically considered strong assets, as they depreciate over time. Over 70% of residents are homeowners, with a little over half still being responsible for a mortgage. While owning a home can be integral for building wealth over time, real estate cannot be easily converted to cash in the event of a financial emergency. While the median household income is above the state's median household income, the average annual pay (\$45,448) and average weekly pay (\$874) for residents in Collier County was below the Florida average (\$47,035), meaning that on average, employed residents in Collier County make less annually than the average Floridian.²⁹

As stated in the Collier County Snapshot, more than a quarter of the population (27.5%) has a household income greater than six-figures, 12.5% of households earn between \$75,000 and \$99,999, and 18.8% earn between \$50,000 and \$75,999. Twenty-four percent of households earn between \$25,000 and \$49,999, while the remaining 17.3% earn less than \$23,999 (see Figure 9, section III). Since 2011, there has been a reduction in the percentage of aggregate household income from wages and salaries and an increase in income from self-employment. In addition, there has been an increase in the percent of household income coming from retirement and social security.³⁰

THE AVERAGE ANNUAL AND
WEEKLY **PAY** FOR COLLIER
RESIDENTS IS **BELOW** THE
STATE AVERAGE.

COST OF LIVING

As cost of living in a community increases, lower income families may have difficulty meeting their basic needs. According to Dr. Amy Glasmeier, Professor of Economic Geography and Regional Planning at MIT, the “living wage” estimate can be used as an alternative to measure basic needs that provides an approximation of cost elements in a basic household budget. This number represents the absolute minimum employment earnings a household would need to maintain self-sufficiency. This estimate is merely a step-up from poverty. Families that meet this basic threshold still live paycheck to paycheck and cannot afford what many middle and upper class families consider to be necessities (e.g., eating at restaurants, taking vacations/holidays, building savings/retirement funds).³¹ In most of the US, the minimum wage does not provide a living wage for a typical family of four (two working adults, two children). It is estimated, that two earners would need to work nearly four full-time minimum-wage jobs (a 75-hour work week per working adult) to meet the living wage threshold.³²

According to the MIT Living Wage Calculator, the required annual income before taxes for a family of four (2 adults, 2 children) in Collier County is \$66,127. The living wage listed below is calculated based on the hourly rate that an individual must earn to support their family, if they are working full-time. This estimate takes into account food, childcare, medical expenses, housing, transportation, taxes and the cost of living in the location. According to their estimates for a family of 4, if both adults are working, each parent would need to earn \$15.95 hourly in order to make a living wage. In a single parent household with 2 children, the parent would need to earn \$29.33 hourly in order to make a living wage (Table 4). Minimum wage in Florida is \$8.05 hourly. According to the estimates in Table 4, a minimum wage salary would create a shortfall for households in Collier County.

Annual Expenses	1 Adult	1 Adult, 1 Child	1 Adult, 2 Children	2 Adults, 1 Child	2 Adults, 2 Children
Food	\$2,983	\$4,516	\$6,722	\$6,921	\$8,888
Child Care	\$0	\$7,818	\$11,857	\$7,818	\$11,857
Medical	\$2,235	\$7,282	\$6,995	\$6,995	\$7,156
Housing	\$8,319	\$12,317	\$12,317	\$12,317	\$12,317
Transportation	\$4,401	\$8,358	\$10,918	\$10,918	\$11,911
Other	\$2,458	\$4,008	\$4,826	\$4,826	\$6,010
Required annual income after taxes	\$20,396	\$44,298	\$53,635	\$49,795	\$58,138
Annual taxes	\$2,803	\$6,087	\$7,370	\$6,842	\$7,989
Required annual income before taxes	\$23,198	\$50,385	\$61,005	\$56,637	\$66,127

Table 4. Income Needed for a Living Wage by Household Composition, Collier County 2016
 Source: MIT Living Wage Calculator (2018).
 Retrieved from: <http://livingwage.mit.edu>

Many of the basic costs of living listed in Table 2 are not taken into consideration – nor is location – when calculating the Federal Poverty Level (FPL). It is important to note that this methodology has not been updated since 1974.³³ Alternate measures are necessary that wholly reflect families' basic needs and expenses while accounting for regional variation in cost of living. This regional variation is particularly important in areas that have higher housing costs, such as Collier County. According to the Economic Viability Dashboard, in 2012, Collier ranked poor in Housing affordability and fair in both job opportunities and community support.³⁴

One such alternate measure of income is the ALICE Threshold, or AT, developed by the United Way in 2009. ALICE is an acronym for "Asset Limited, Income Constrained, Employed". This acronym describes households that earn more than the aforementioned FPL, but less than the basic cost of living for a given region or county. Using the AT measure along with the measure for FPL can provide a more complete picture of the population struggling to afford basic needs in any given community. In other words, ALICE households typically earn more than the FPL (\$23,850 for a family of four) but less than a living wage (\$66,127 according to the MIT living wage calculator).³⁵ As of the 2014 ALICE Report, it was estimated that 10 % of families in Collier County were at or below the FPL, and an additional 24% of households were below the AT, down from a combined 41% in 2012.



EMPLOYMENT AND LABOR FORCE

The economic recovery of the region has continued with employment and unemployment rates reaching levels closer to normal long-term values.³⁶ Since 2010, the unemployment rate has been declining throughout the country. According to the 2012-2016 ACS 5-year estimates, the unemployment rate in Collier County is 6.4% over that time period.³⁷ In September of 2017, the Bureau of Labor Statistics stated that the unemployment rate in Collier County to be 3.9%. This represents a marked improvement from September of 2010 when the estimated unemployment rate was 12.5% for the county (see Figure 11).

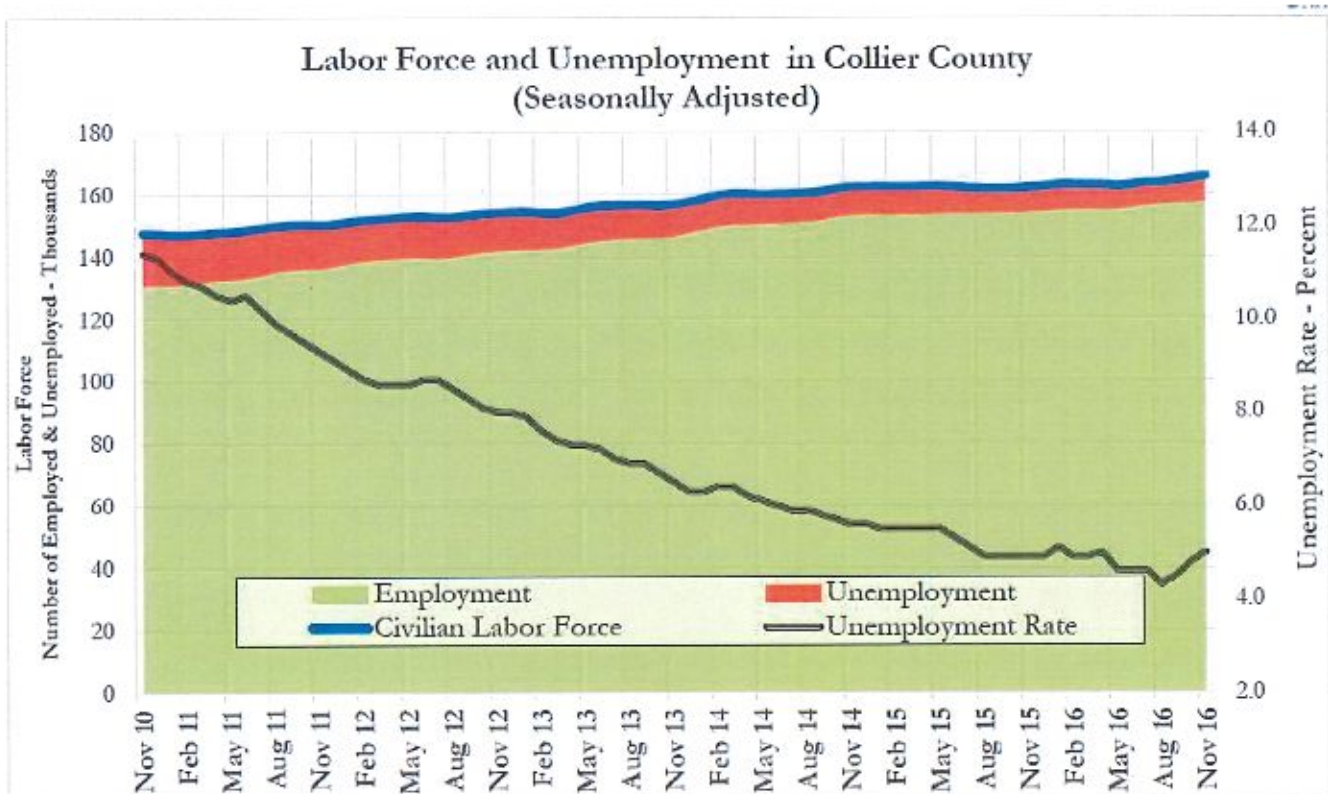


Figure 11: Labor Force and Unemployment: Collier County, 2005-2017
 Source: US. Bureau of Labor Statistics (BLS). (2017).
 Reprinted from: Collier County Economic Conditions Report (2017).

The labor force is defined as of the number of individuals 16 years and over available for work. A significant percentage of residents in Collier County are not in the labor force (46.90%). This rate is higher than the State of Florida rate (41.60%). This trend is likely due to the fact that many of Collier's residents are of retirement age.³⁶

While the population of 16 years and over increased by almost 30,000 from 2010 to 2016, the percentage of labor force decreased from 55.5% to 53.1%. Since 2010 more women have entered the workforce (currently 47.8% are in the labor force and 44.6% are employed), and the percentage of two parent households in which both parents are working has increased (62.3% of households with children under 6 and 72.3% for children ages 6 – 17).³⁷

According to the Collier County Economic Conditions report, employment opportunities in the County vary by season. Unemployment peaks during the summer months of July and August as many of the tourists and seasonal residents have left the area. Over the last few years, the difference between the annual high and low unemployment periods has tightened, indicating the movement towards a more stable, less seasonally-driven economy.³⁸

From 2012-2016 in Collier County, most residents were employed in management, business, science and arts occupations (Figure 12). The second most common employment category was service occupations, followed closely by sales and office occupations.³⁹

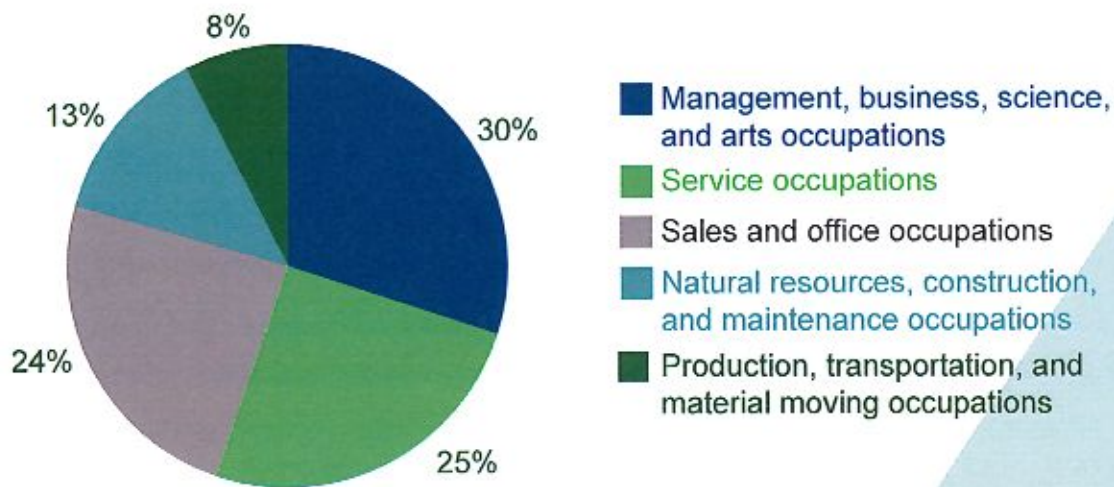


Figure 12. Occupational Categories
Source: ACS 2012-16 5-yr estimates
Retrieved from: <https://factfinder.census.gov>

From 2012-2016 in Collier County, most residents were employed in the education, health care, and social service industries, followed closely by the arts, business, science and arts occupations (Figure 13). The next most common employment industry was professional occupations followed by the retail trade, and construction industries.⁴⁰



Figure 13: Industry Categories
 Source: ACS 2012-16 5-yr estimates
 Retrieved from: <https://factfinder.census.gov>

INDUSTRY AND LABOR MARKET

The tourism industry in Collier County has remained strong. According to the Southwest Florida Regional Economic Indicators Report published monthly by Florida Gulf Coast University, seasonally-adjusted tourist tax revenues increased 15% from 2016 to 2017. In addition, Collier County's taxable sales increased 7% from 2016 to 2017.⁴¹ Both of these indicators suggest an improving economy, which should lead to an improved labor market.

The Labor Market in Collier County is considered to be diverse. The Florida Gulf Coast University Industry Diversification Index (IDI), measured as part of its Industry Diversification Project, categorized "the degree to which a region's workforce is concentrated in few industries or dispersed into many".⁴² The IDI for the Naples-Immokalee-Marco Island MSA (comprising all of Collier County) increased from the previous year. In general, the area's diversity index has been comparable to the IDI in the state and is currently ranked as the most diverse of Florida's 22 MSAs.⁴³

In 2015, a research team at Hodges University published the Collier County Business Climate Survey designed to ascertain the opinions of local business leaders with respect to business opportunity in Collier County.⁴⁴ The results of this study indicated that business leaders felt that the economic conditions in the county and in their own respective industries were improving. The majority of business leaders expected this trend to continue. Slightly over half of the sample projected an increase in employment opportunities and almost all respondents expected either an improved employment market (or stable employment market) in the next year. Slightly over half of the sample expected to expand their operations while a little less than half of respondents were concerned with the ability to obtain a sustainable workforce.⁴⁵

Annually, Workforce Now (a regional research initiative directed by Southwest Florida's research universities) produces the Southwest Florida Workforce Overview Study.⁴⁶ This report provides an overview of the most common employment opportunities available for residents by industry along with a description of employment gaps and projected employment growth across industries.

According to their December 2016 report, the fastest growing industry in Southwest Florida between 2011 and 2015 was construction, which contributed to 50% of the increase in employment opportunities.⁴⁷ It is projected that the fastest growing industries in the area of over the next few years will be in health care and social assistance, followed by retail trade, construction, and accommodation and food services.⁴⁸

Furthermore, Workforce Now reported the top 10 occupations in which there was an existing employment gap in the region. A reprint of their analysis is included in Figures 14 and 15. Many of the employment gaps are in service industries and some require a HS diploma or less. Furthermore, wages for these jobs are lower than would be necessary to meet the cost of living threshold in Collier County. Jobs that require at least Vocational training or higher have median wages at or above the cost of living threshold.⁴⁹

Top 10 Short-Term Employment Gaps Summer 2016				
Occupation	Current Supply Gap	Current Employment	Median Wage	Minimum Education
First-Line Supervisors of Retail Sales Workers	-317	8,604	\$19.34	PS Adult Voc
First-Line Supervisors of Food Preparation and Serving Workers	-288	4,029	\$15.66	PS Adult Voc
Retail Salespersons	-262	24,434	\$11.11	HS/GED
Maintenance and Repair Workers, General	-154	5,406	\$16.32	PS Adult Voc
First-Line Supervisors of Construction Trades and Extraction Workers	-150	3,486	\$26.08	Some College
Landscaping and Groundskeeping Workers	-140	11,858	\$11.10	Less HS/GED
Securities, Commodities, and Financial Services Sales Agents	-123	724	\$34.64	Bachelor's
Registered Nurses	-114	9,364	\$29.49	Some College
First-Line Supervisors of Office and Administrative Support Workers	-108	4,285	\$22.32	Some College
Physical Therapists	-107	838	\$40.68	Master's or Higher

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Figure 14. Southwest Florida Workforce Overview Study: Short Term Employment Gaps
Reprinted from: Southwest Florida Workforce Overview Study. (2016).

Top 10 Long-Term Growth Occupations 2015 to 2023				
Occupation	Average Annual Growth	Current Employment	Median Wage	Minimum Education
Retail Salespersons	1,369	24,434	\$11.11	HS/GED
Waiters and Waitresses	1,047	15,853	\$9.21	Less HS/GED
Combined Food Preparation and Serving Workers, Including Fast Food	775	11,736	\$9.17	Less HS/GED
Cashiers	692	13,071	\$9.42	HS/GED
Landscaping and Groundskeeping Workers	592	11,858	\$11.10	Less HS/GED
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	460	11,579	\$14.75	PS Adult Voc
Registered Nurses	426	9,364	\$29.49	Some College
Carpenters	369	6,188	\$17.68	PS Adult Voc
Customer Service Representatives	365	7,443	\$14.67	PS Adult Voc
Construction Laborers	362	5,593	\$13.18	Less HS/GED

Source: Occupational Supply/Demand Report, Florida Department of Economic Opportunity

Figure 15. Southwest Florida Workforce Overview Study: Short Term Employment Gaps, 2016
Reprinted from: Southwest Florida Workforce Overview Study. (2016).

FOCUS GROUP REACTIONS

To further explore community sentiment regarding jobs and economic conditions, participants of expert-led and volunteer-led focus groups were asked questions focused on these issues. Both expert participants and community residents in the focus groups perceived that there were not enough jobs. Many agreed that low wages, low benefits, and high cost of living in Collier County were preventing the community from being strong and diverse. Focus group participants stated that since many of the County's older population is seasonal, jobs also tend to be seasonal. Participants commented that this was problematic for workers since there is no consistent stream of revenue coming in to their households, making it difficult to meet basic needs.

SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County questions focused on these issues. Respondents were asked if they believed that jobs were available for residents year-round. Overall, a little less than half of respondents (48%) agreed or strongly agreed that jobs were available year-round, with approximately 41% disagreeing or strongly disagreeing. About 11% stated they did not know whether jobs were available for residents year-round (Figure 16a). In addition, respondents were asked if they believe that residents in their communities made enough money to provide for their families. Only 34% of respondents strongly agreed or agreed with the above statement, while over 53% of respondents disagreed or strongly disagreed with that statement (Figure 16b). Taken together, while many in the community feel that jobs are available, a larger majority feel that despite job availability, families do not make enough income to meet their needs.

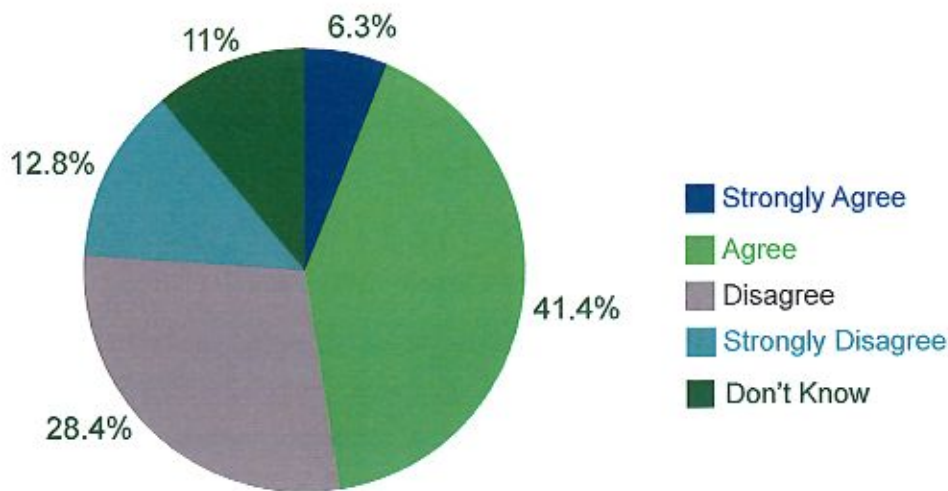


Figure 16a. Jobs Available Year Round
Source: CC-CAS, Q-Q Research. (2017).

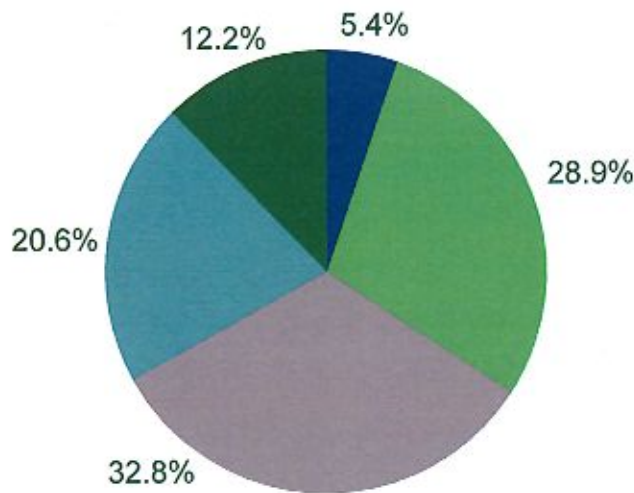


Figure 16b. Enough Income to Provide for Family
Source: CC-CAS, Q-Q Research. (2017).

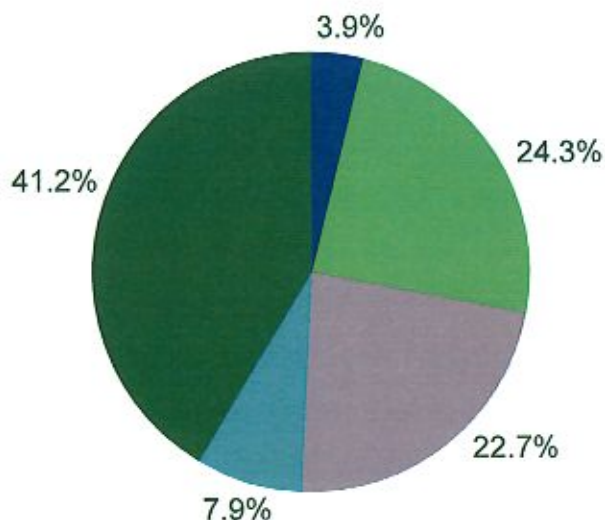



Figure 17. Satisfaction with Job Training Programs
Source: CC-CAS, Q-Q Research. (2017).

Furthermore, people were asked if they were satisfied with their community's employment opportunities. Responses to this question were very similar to the aforementioned question regarding job availability, with about 48% percent of participants indicating that they were satisfied or very satisfied, and 34% of participants indicating that they were dissatisfied or very dissatisfied.

Finally, people were asked if they were satisfied with their community's job training programs. (Figure 17). Many residents replied that they did not have an opinion regarding this issue. A greater percentage of respondents who answered the question indicated dissatisfaction with job training programs (approximately 31% were dissatisfied or very dissatisfied with only 28% being satisfied or very satisfied). Altogether, many residents indicate a lack of awareness of these programs, while those who are aware indicate being more dissatisfied than satisfied with programming.



Finally, in their projects, Workforce Now examined potential occupational growth by minimum educational requirement (vocational training, some college, bachelor's or higher).⁵⁰ The median wages for the half of the fastest growing vocational occupations would be enough (or slightly below) the median wage necessary to make a living wage for a family of 4 (\$15.90). These occupations included first line supervisors of food preparation workers, carpenters, first line supervisors of retail workers, maintenance and repair workers and roofers. All of the fastest growing occupations for individuals with some college education, or with a bachelor's degree or higher, have median wages above the median wage necessary to make a living wage for a family of 4. Some examples of the fastest growing occupations involving some college are Registered Nurses, Construction Managers, Bookkeepers and Accounting Clerks, Agricultural Managers, and First-line supervisors of both trade and office workers. Some examples of the fastest growing occupations involving a Bachelor's degree or higher include teachers across elementary and secondary schools, accountants, management analysts, lawyers, general practitioners and physical therapists.⁵¹ Most of these occupations make almost double the median wage necessary for a living wage for a family of 4. These results highlight the relationship between education and jobs that pay a living wage.

COMMUNITY DIFFERENCES AND DISPARITIES

Income inequality in the county is a cause for concern. Collier County represents the second most unequal metro area in Florida with respect to income according to 2013 ACS data. The top 1% in the area makes 73.2 times more than the bottom 99%. According the Economic Policy Institute, the average income of the top 1% in Collier County is \$4,191,055.⁵² The average income of the bottom 99% is \$57,258 (which is very close to the median income in the county). The ratio of top 1% income to bottom 99% income is 73.2 making it the 8th ranked county in the US with respect to income inequality. Only Franklin County in FL has a wider income gap (ratio of 73.4).

Over the past 12 months, the median household income for families was estimated at \$69,107, the median income for married-couple families is \$80,979, while the median income for non-family households was \$39,346. Married-couple families were most likely to have household incomes above six-figures (25%).⁵³

Following national trends, the median individual salary of male, full-time year-round workers in Collier County (\$40,797) was greater than the median individual salary of female, full-time year round workers (\$35,056).⁵⁴ This wage gap is seen across levels of education (see Table 5).

Educational Attainment	Males		Females		Percent Difference
	Estimate	Margin of Error	Estimate	Margin of Error	
Population 25 years and over	\$33,688	+/-2,185	\$26,864	+/-689	20.3%
Less than high school graduate	\$21,554	+/-849	\$15,954	+/-938	26.0%
High school graduate (or equivalent)	\$29,471	+/-1,532	\$22,114	+/-1,166	25.0%
Some college or associate's degree	\$39,342	+/-3,706	\$27,885	+/-1,730	29.1%
Bachelor's degree	\$52,032	+/-1,892	\$37,330	+/-1,975	28.3%
Graduate or professional degree	\$76,170	+/-6,573	\$51,763	+/-5,568	32.0%

Table 5. Earnings by Education and Gender
 Source: ACS 2012-2016 5 year estimates
 Retrieved from: <https://factfinder.census.gov>

In 2012 – 2016, the following fields were occupied predominantly by males (> 70%): computer and mathematics, architecture and engineering, firefighters, law enforcement, construction, maintenance, farming, and transportation. During the same period, the following fields were occupied predominantly by females (> 70%): education training and library, health practitioners and technicians, healthcare support, office and clerical support.⁵⁶

Hispanic and Black residents were more likely to be part of the labor force (72.4% and 52.3% respectively). Black and Asian residents were more likely to be unemployed (15.2% and 11.2% respectively).⁵⁶ Black and Hispanic households were more likely to be identified as below ALICE or FPL.⁵⁷ As children add considerable costs to a family (see Table 1), one would expect that many of the families in Collier County that are below the FPL and AT have children. Most families with children in Collier County are married, two parent households, and 31% of these households fall below these thresholds.⁵⁸ Single parent households are more likely to struggle, with 70% of single mother households and 62% of single father thresholds falling below FPL and AT. Finally, educational attainment is related to FPL, with residents having less than a high school education being most likely to live below the FPL.⁵⁹

ALICE and FPL also varied by community. The CDPs of Naples Manor, Immokalee, Golden Gate, and Naples Park contained the highest percentage of households living below the ALICE and FPL thresholds at 79%, 74%, 62%, and 51% respectively. The percentage of households below the ALICE and FPL thresholds was between 25% and 38% in the following Cities and CDPs: Naples, Marco Island, Lely, Lely Resort, Orangetree, Pine Ridge, and Verona Walk. The percentage of households living below the AT and FPL thresholds was lowest in the CDPs of Island walk, Pelican Bay, and Vineyards at 16%, 16%, and 12% respectively.⁶⁰



FOCUS GROUP REACTIONS

During focus group sessions, experts and community residents from Immokalee noted that most residents living in this area of the county work in service industries or in agriculture. They stated that many undocumented families have stopped moving due to fear of being deported. Seasonal work fluctuations have led to inaccurate resident counts, which result in fewer services than needed. Agricultural income often fluctuates, making it difficult to make ends meet.

In addition, experts and community resident focus group participants commented on various issues facing the Haitian community in Collier County. Participants recognized the key role played by The Haitian Alliance for Collier County on job related issues. According to participants, many Haitians without post-secondary education work in the service industry. Professionals face race discrimination in hiring or are over-qualified for the jobs they obtain. More information about funding and business opportunities for Haitians is needed.

Within individual groups, Young Professionals (YPs), Single Moms (SMs), and the Teachers, Police, First Responders (TPFRs) had concerns about their community's employment and economic prospects. YPs were concerned about a lack of jobs and the salaries and incentives to keep new and mid-career professionals within the community.



SURVEY: COLLIER COUNTY OPINIONS

According to results of the CC-CAS survey, 69% of residents living in the following zip codes were more likely to disagree or strongly disagree that jobs are available for residents year-round: 34137, 34138, 34140, 34142, and 34143. These zip codes correspond to the following communities: Copeland, Chokoloskee, Everglades City, Goodland, and Immokalee. In the same zip codes, only 13% of residents agreed that residents in their community made enough money to provide for their families. It should be noted the percentages of residents agreeing with this statement was lower than 50% across all zip codes except 34134 (North Naples/Bonita Springs) and 33145 (Marco Island).

When asked about satisfaction with job training programs, 59% of residents living in the same group of zip codes (34137, 34138, 34140, 34142, and 34143) were more likely to be dissatisfied or very dissatisfied with job training programs. Only 31% of respondents in these areas responded that they were satisfied or very satisfied with services.



KEY POINTS

When households do not earn a living wage, families are typically forced to make tough decisions and forgo certain essentials choosing between health care or healthy food, and/ may live in substandard housing in order to survive, substantially impacting quality of life.

Given the cost of living in Collier County, and in light of the fact that many households are below the FPL and ALICE thresholds, the number of families not earning enough to meet basic needs is cause for concern.

Creating opportunities for residents to earn a wage that is equal to a living wage is key to improving the happiness and quality of life of county residents. While unemployment is considerably lower than it has been in years, and the economy is much improved, many of the available employment opportunities in Collier County, both current and projected, have a median annual wage below the minimum amount needed for self-sufficiency.

Many of the employment opportunities that have a median annual wage at or above the amount needed for self-sufficiency require at minimum, vocational training. There is a lack of good paying jobs for those with a high school diploma or less. In order to improve the quality of life for many households, training programs and educational opportunities aligned with occupation growth in higher paying occupations are needed.

PHYSICAL ENVIRONMENT (HOUSING, TRANSPORTATION/INFRASTRUCTURE, AND ENVIRONMENT)

INTRODUCTION

The physical environment of a community is also intertwined with residents' quality of life. Having a secure, affordable, non-transient place to live is considered a basic need that allows residents to meet other basic needs.⁶¹ Where one lives determines access to employment, social services, education, transportation and recreational activities, along with safety. In general, housing can be considered an issue of supply and affordability. A high cost of housing can force middle and low-income residents to cut back on basic needs (e.g., food, transportation, clothing and health care).⁶² High housing costs often make it more likely for poorer residents to live farther from employment, community services, and recreational activities. Long commutes to work can increase the cost burden on families even more.⁶³ Affordable housing in Collier County continues to be a problem for many residents. As the population in the county continues to grow, thoughtful informed growth management plans will be necessary in order to create livable communities with a high quality of life for all classes of residents. This involves adequate housing, transportation, and services, all while managing to conserve and protect the natural resources and environment of the community.

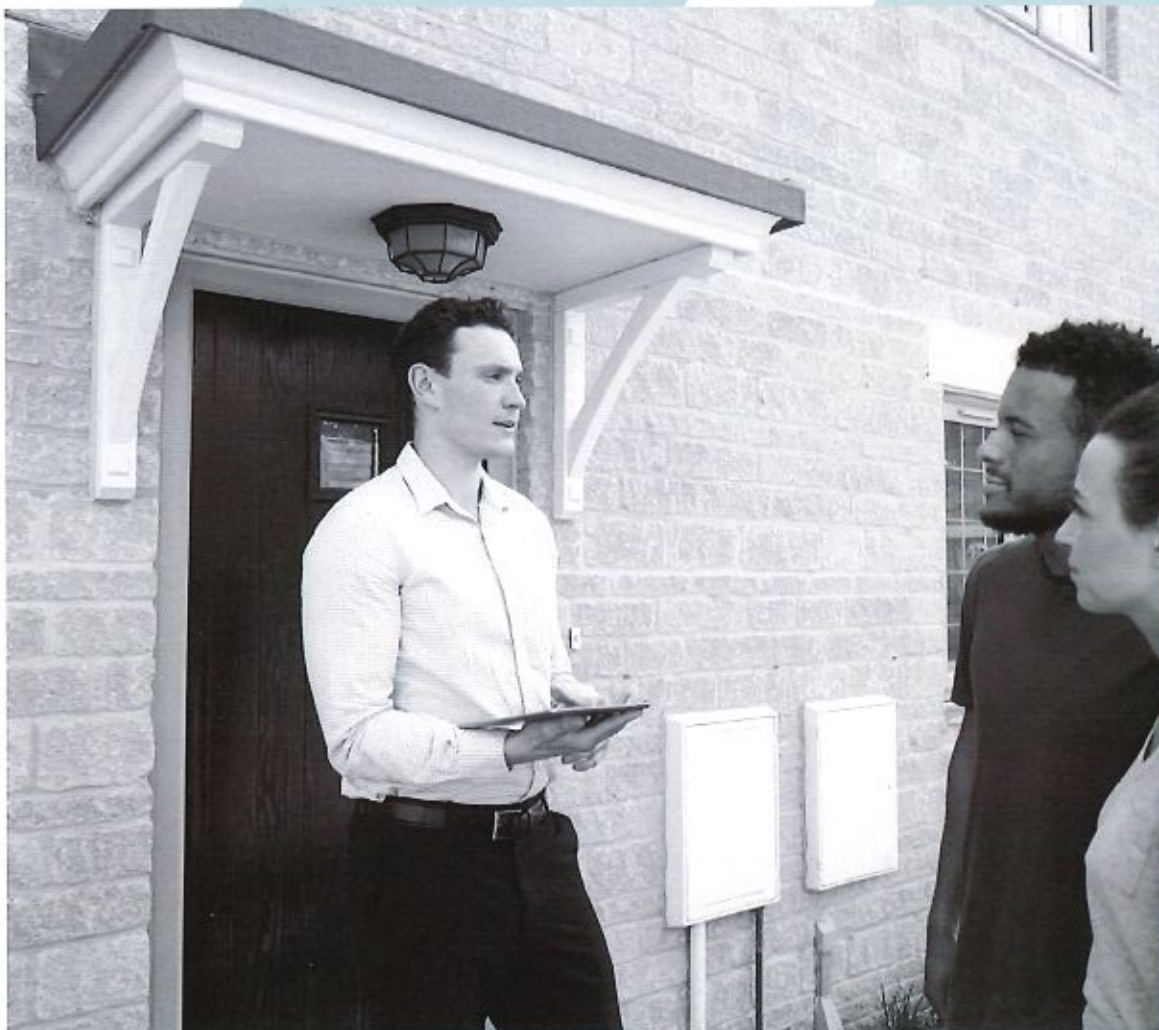


DATA

HOUSING AFFORDABILITY AND INVENTORY

Data presented below regarding housing affordability and inventory was obtained from the Florida Housing Data Clearinghouse (FHDC).⁶⁴ The FHDC used data from the U.S. Census Bureau's 2010 Census Data, 2011-15 ACS 5-year summary data, and projections from the Bureau of Economic and Business Research at the University of Florida.

The average single-family home value in Collier County was \$573,519 in 2016. For comparison purposes, the average single-family home value in the state was just \$219,681.⁶⁵ The average value in the county for condominiums was \$342,000, while mobile home value was \$78,899. In 2016, the median sales price for a condominium in Collier County was \$255,000 and the median sales price for a single-family home was \$415,000. The statewide median sales price for a single-family home



was \$212,000, less than the median sales price for a condo in Collier County.⁶⁶ In 2016, it was estimated that just under 73% of households in Collier County are homeowners. Residents aged 15-44 are more likely to rent, while residents age 45 and up are more likely to own.⁶⁷

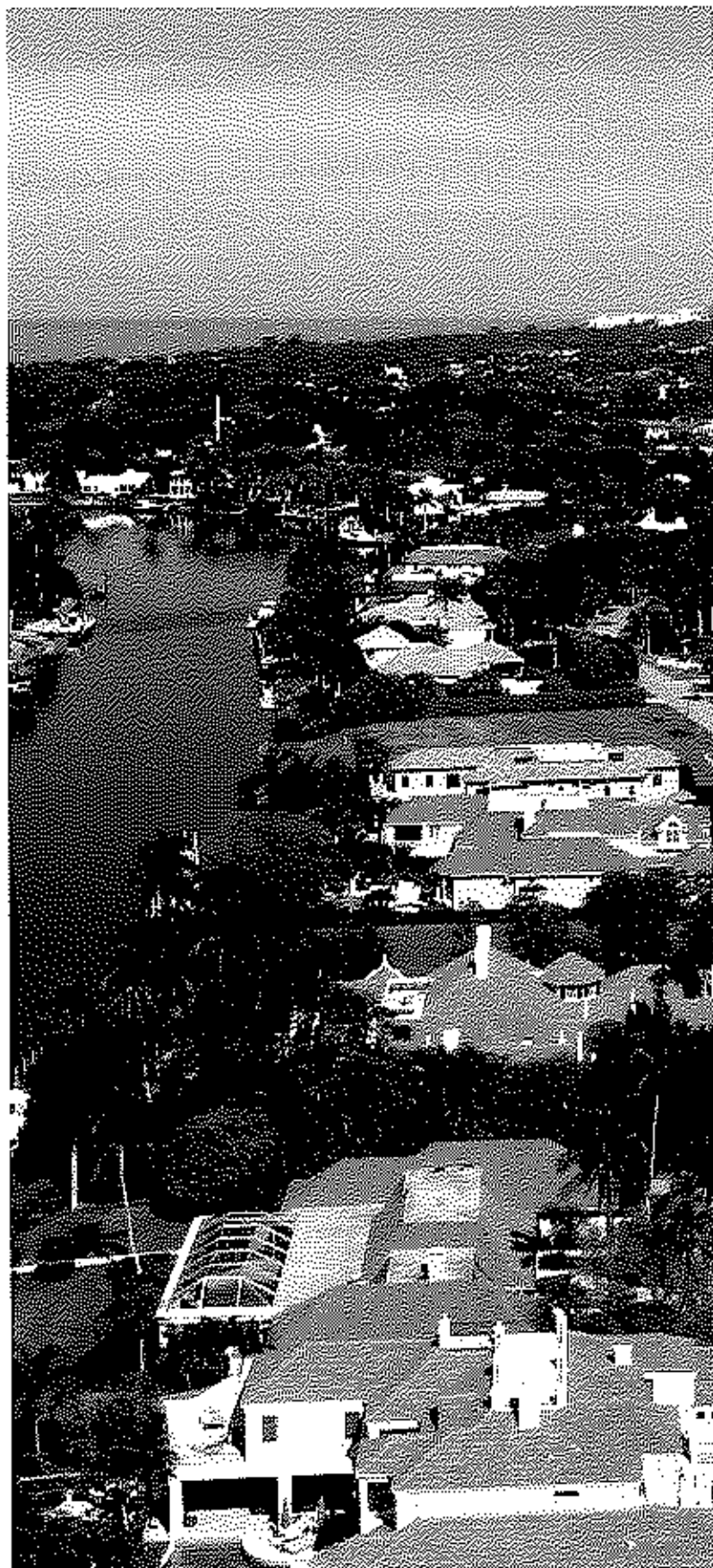
For the remaining 27% of residents who rent, median gross rent was \$1,063 monthly in Collier County in 2016, compared to \$1,002 statewide.⁶⁸ Rent prices vary according to the size of the unit. According to the US Department of Housing and Urban Development, fair market monthly rent was as follows based on unit size: a studio apartment: \$801, one-bedroom: \$973, two-bedroom: \$1195, three-bedroom: \$1606, and four bedroom: \$1996.⁶⁹ It is estimated that 8% of renters paid more than \$1999 monthly in 2011-2015.⁷⁰

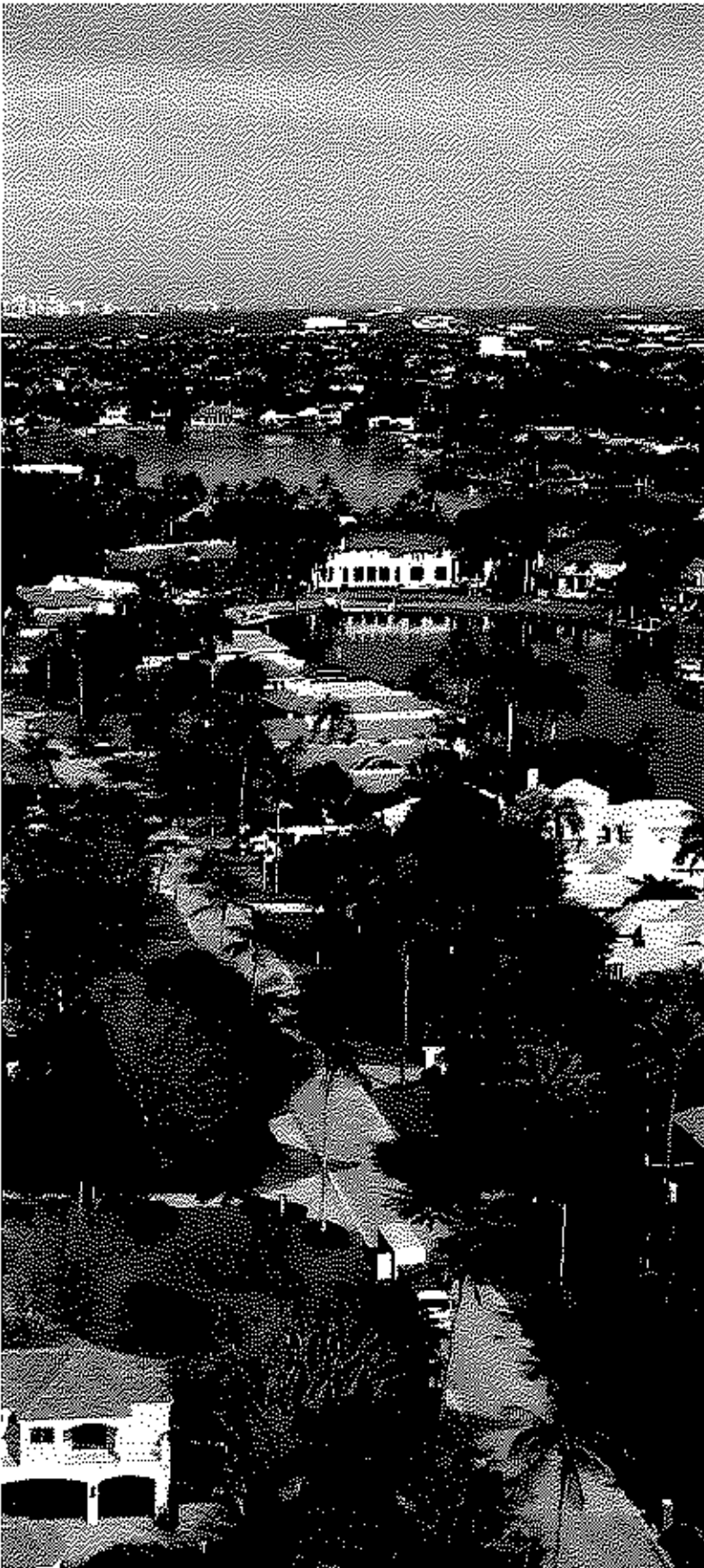
Many residents in the community are concerned with both housing affordability and inventory. In early 2017, the Urban Land Institute (ULI) completed an assessment of housing, land use, and real estate issues in Collier County and presented their findings to the Board of Commissioners in Collier County. In their assessment, the researchers focused on housing cost burden for families defined as the following:

Rent/Mortgage + Utilities + Taxes & Insurance (if applicable) = Cost Burden.

If a household uses more than 30% of their income on housing, they can be considered cost burdened, if they use more than 50% of their income on housing, they can be considered severely cost burdened.⁷¹

In 2016, in Collier County, most households were not cost burdened (60%), but 20.5% of households were considered cost burdened, and 19.5% of households are severely cost burdened.⁷² These families are likely to have to cut back on other basic necessities in order to have a place to live. It is projected that while the percentage of cost burdened households





will remain flat through 2025, the number of households that are cost burdened is expected to increase.⁷³

As stated in the formula above, cost burden also takes into account taxes and insurance. In Collier County, flood insurance is often necessary at additional costs. Homeowners insurance is among the costliest in Florida and many communities charge homeowner association (HOA) fees.⁷⁴ According to estimates from the AARP Livability Index, housing costs and housing cost burden in Collier County are significantly above that for the median US neighborhood and in the top third in the US.⁷⁵

According to ULI, residents employed in the following sectors are most likely to be cost burdened: public safety (e.g., firefighters, police officers), health care (e.g., nurses, nursing/medical assistants, senior care providers), education (e.g. teachers & support staff), service workers (e.g., wait staff, hotel staff, retail workers, landscape, maintenance), and entry/mid-level professionals (e.g., bank tellers, government employees, administrative assistants). The services provided by these residents are essential for maintaining a safe, high-quality community.⁷⁶

An additional area of concern noted in the ULI report was the lack of housing for specific types of residents in need. These groups include low to moderate income seniors who have a lack of independent and assisted living options, people in need of residential mental health care and support services, and very low-income residents.⁷⁷ There are fewer units of subsidized housing in Collier County than for the median US neighborhood.⁷⁸

Furthermore, the ULI report discussed the availability and quality of housing units at the lower end of the cost spectrum that may be available. It was estimated in their report that approximately 8% of homes on the market in Collier County

in 2016 were occupied by residents earning less than the median income of the community, and the vast majority of these units were condos.⁷⁹

ULI presented a series of recommendations designed to improve the housing issues facing the county. Their recommendations involved establishing a shared vision of Collier's future and communicating with the community to raise public awareness. These issues affect the entire community, not just the neediest residents. ULI called for the community to increase the supply of affordable rental housing and for the county to rewrite the land development code using several recommended strategies designed to mitigate a multitude of identified issues. In addition, they recommended that the Affordable Housing Trust fund be reactivated. Finally, they recommended enhancing the minimum wage in the county. Other recommendations involved transportation. These issues will be discussed in the transportation section that follows.⁸⁰



FOCUS GROUP REACTIONS

These concerns were echoed by participants of an expert-led focus group held on the topic of housing. According to a panel of expert participants, 50% of the population of Collier County, including homeowners and renters, is cost burdened. Most affected residents fall below 60 to 80% of the county median income, including low wage earners, young professionals, and seniors who have outlived their savings. Group participants stated that rental properties are largely unavailable, which lead many lower-income residents to move to nearby counties and towns, like Lee and Lehigh, where they spend the earnings they made in Collier County.

They also echoed the concerns regarding a lack of subsidized housing. Experts believed that the lack of subsidized housing is due to resistance to mixed-income development models, high development taxes, impact fees, and regulations. According to group participants, even though tax credits are available to developers to build low-income housing, there is no incentive to build these units because there is still a healthy market for expensive, single family homes in the county. This demand also works against higher density housing plans. Experts also shared a concern that plans for low-income housing in eastern Collier County could drive service workers further away from their jobs in Naples and other areas to the west, creating different sets of struggles.

Related to lack of subsidized housing is the issue of housing quality for low-income residents. A main concern among the community experts was the large number of substandard housing units, mostly

trailers, prevalent in poor areas of the county, such as Immokalee, where multiple families share a home to save money. In addition, expert focus group participants felt that while housing issues of poor, disenfranchised residents were not receiving enough attention by local government, some commissioners are starting to show more interest in working with advocates. Private employers are also starting to show interest in housing financing solutions to attract needed service workers. According to one expert, the ULI study referenced above has provided very useful data on housing issues, and is being widely distributed. In addition, the local newspaper, Naples Daily News, has been focusing more on housing issues in the county, raising awareness.

Issues related to housing costs and availability were also brought up by community residents during the volunteer-led focus groups, analyzed by the Q-Q Research team. Every single focus group conducted with community residents discussed housing issues. Participants agreed that finding affordable housing in the area was nearly impossible for many. There was general agreement that service and public-service workers had an incredibly tough time finding affordable homes or rentals within the community, causing many of that population (and the middle-class workforce in general) to have to live in neighboring communities and commute in for work. Many agreed that the low wages, low benefits, and high cost of living were preventing the community from being strong with a diverse population of residents.

SPECIAL ISSUE: HURRICANE IRMA'S IMPACT ON HOUSING

ACCORDING TO EXPERT PARTICIPANTS, 60% OF HOUSING IN EVERGLADES CITY HAS BEEN CONDEMNED AS A RESULT OF THE STORM; SENIORS AND RESIDENTS OF TRAILER HOME COMMUNITIES IN EAST NAPLES AND IMMOKALEE WERE ALSO VERY AFFECTED. ASSISTANCE TO RE-BUILD IS NOT AVAILABLE FOR UNDOCUMENTED AGRICULTURAL WORKERS. PARTICIPANTS OBSERVED THAT SENIORS WHO QUALIFY FOR THE STATE HOUSING INITIATIVES PARTNERSHIP PROGRAM (SHIP) FIND THE APPLICATION PROCESS TO BE CUMBERSOME. DOWN-PAYMENT ASSISTANCE TO PROSPECTIVE HOME OWNERS IS BEING RE-ALLOCATED TO COVER DISASTER RELIEF COSTS. ANOTHER CONSEQUENCE OF THE HURRICANE WILL BE THE INCREASE IN FLOOD INSURANCE COSTS FOR HOMEOWNERS.

SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County questions focused on housing issues. Respondents were asked if they believed that affordable housing was available for residents who needed it. Overall, only a quarter of respondents (25%) agreed or strongly agreed that affordable housing was available for residents, with approximately 64% disagreeing or strongly disagreeing. About 11% stated they did not know whether affordable housing was available (Figure 18a). The results indicate that much of the community is aware of the issues discussed above, but about 1/3 of the community is either not aware of the issue or doesn't believe it is a problem. In addition, respondents were asked if they were satisfied with the affordable housing options. Only 18% of respondents strongly agreed or agreed with the above statement, while over 65% of respondents disagreed or strongly disagreed with that statement (Figure 18b). Residents were also asked about their satisfaction with utility services and waste management. Over 70% of residents were satisfied with utility services, and 74% were satisfied with waste management services.

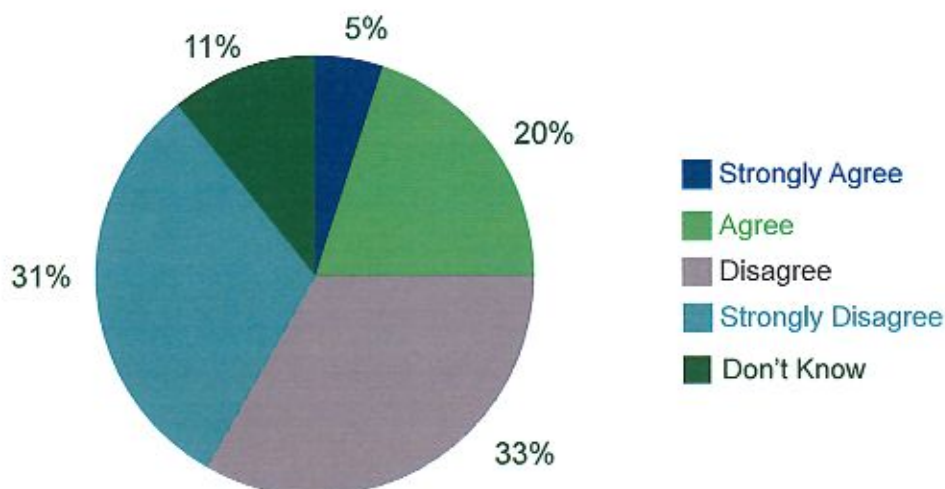


Figure 18a. Availability of Affordable Housing
Source: CC-CAS, Q-Q Research. (2017).

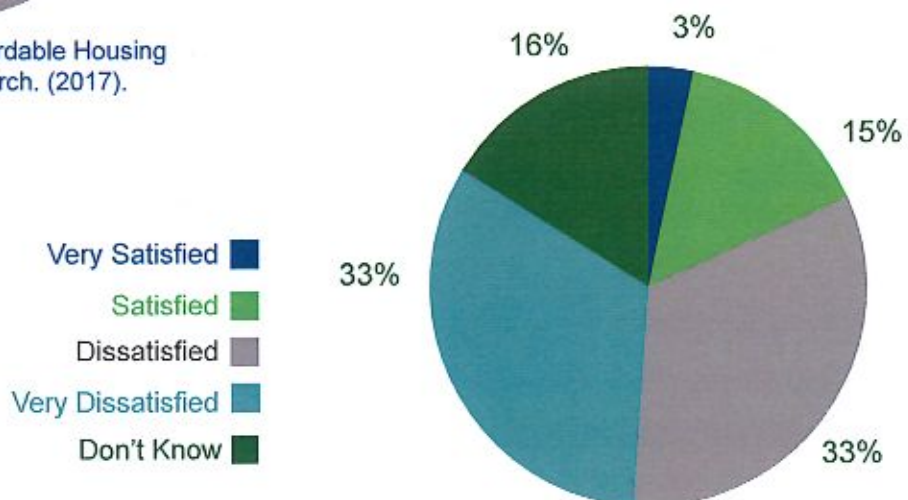


Figure 18b. Satisfaction with Affordable Housing
Source: CC-CAS, Q-Q Research. (2017).

TRANSPORTATION OPTIONS AND TRAFFIC

According to the Collier County Economic Conditions Quarterly report, the County has seen an annual growth of nearly 2% in traffic counts over the past 5 years.⁸¹ Researchers noted that traffic pattern fluctuations are seasonal, with traffic worsening during the peak season. According to their analyses, many of the main roadways in the urban western areas have already been expanded to capacity. The authors note that the traffic in the county will be above average until the services offered in the east match the population growth that has occurred in those regions. Over 85% of Collier residents drive to work (74% drive alone and 11% carpool). Less than 3% take public transportation to work, while another 4% get to work by other means. The remaining 7% of residents work from home. The average travel time to work is 24.2 minutes.⁸² In general, residents depend on their own means of transportation to get to and from most places.

In their assessment of housing affordability, the ULI also took note of the Housing + Transportation Index. In general, when residents can't find affordable housing in the areas in which they work, they move further away to reduce cost burden. Though doing so decreases housing costs, it usually comes with an increased transportation cost of 5 to 10%.⁸³



FOCUS GROUP REACTIONS

Similar concerns were noted by participants of an expert-led focus group held on the topics of transportation and infrastructure. According to participants, the use of multimodal transportation, which would involve building more pathways to include safe walkable and bikeable options, are not equally supported by the public. The cycling community, for example, is diverse (e.g., commuters, families, recreational) and it is hard to find solutions to accommodate everyone. The widening of roads encourages high speed, which result in car and pedestrian accidents. Heavy traffic is also a challenge to road and pedestrian safety. Experts report that for those using public transportation, access to bus stops can be challenging due to a lack of safe, walkable pathways.

These concerns were echoed during the volunteer-led focus groups attended by community residents. Across the board, residents were concerned with the lack of public transportation options. Many believe that public transportation is dismal and could be strengthened. Residents feel, the existing public system, CAT, caters to the hotel and tourism population rather than the locals due to the routes and infrequency of operation. It's important to note that many seasonal workers do not have a driver's license making it very difficult to commute to and from work without adequate public transportation.



SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County questions focused on transportation and traffic. Respondents were asked if they believed that residents in their community had access to transportation. About 55% of residents agreed or strongly agreed, while 37% of residents disagreed or strongly disagreed, that residents had access to adequate transportation. In addition, respondents were asked if they were satisfied with the public transportation options. About 52% were satisfied or very satisfied with public transportation options, about 32% were dissatisfied or very dissatisfied, and about 15% didn't know. Responses to the above questions did not vary greatly at the zip code level.

Respondents were asked if they believed that traffic in their community had an impact on their quality of life. About half of respondents (50%) agreed or strongly agreed that traffic did have an impact on quality of life, while 46% of residents disagreed or strongly disagreed with that statement. When asked if the traffic congestion was problematic, 60% of residents were dissatisfied or very dissatisfied with traffic congestion. Finally, 73% of residents agreed or strongly agreed that they felt safe driving in their community. Responses to the above questions did not vary greatly at the zip code level with one exception. Greater percentages of residents (70%) in the western and northern parts of the county (zip codes 34102, 34104, 34105, 34108, 34109, 34119) reported greater dissatisfaction with traffic congestion. This is consistent with the analysis completed in the Collier County Economic Conditions Quarterly Report, indicating that traffic in the west will continue to be problematic until services in the east of the county match the recent residential development in those areas.⁸⁴

WHILE THE MAJORITY OF RESIDENTS **FEEL SAFE** DRIVING IN COLLIER COUNTY, THE MAJORITY ARE ALSO **DISSATISFIED WITH TRAFFIC CONGESTION** IN THE AREA.

GROWTH MANAGEMENT AND PUBLIC SPACE MAINTENANCE

As previously noted, Collier County is one of the fastest growing counties in the state and 17th in the nation. In order to ascertain perceptions of residents regarding growth management and public space maintenance, the research team discussed these issues with focus groups and included questions related to these issues on the CC-CAS survey.

FOCUS GROUP REACTIONS

Planning for Growth: According to expert participants, Collier County is expected to grow at a 17.8% rate between the 10 year period from 2010-20, placing it among the top 17 counties in the state for growth. Some residents are showing interest in new forms of development, including mixed use options affording more walkability and bikeability. The City of Naples is adopting a "Complete Street" plan which could be expanded to the whole county. "Complete Street" plans sponsored by the Florida Department of Transportation (FDOT) provide transportation options that serve the needs of various transportation system users including pedestrians, cyclists, transit riders, motorists, and freight handlers.⁶⁵ Participants agree that insufficient capacity of east to west corridors is a big problem. Road connectivity is necessary, but is hindered by the proliferation of gated communities.

There is also agreement among experts on the need for accessible, reliable, convenient, and affordable public transit for service workers in the county, particularly in the east. But, participants felt there is inadequate planning to include multi-modal transportation options that do not require the use of a car and that diminish environmental damage. According to many in the group, the "not in my backyard" mentality leads to opposition to county-wide transportation and traffic solutions. This results in missed opportunities to place service structures closer to where people live, thereby reducing the need for longer distance trips that could reduce road congestion.

Expert group members noted that the public is often unaware of the potential impact of county development and growth plans, likely due to the fact that information regarding potential impact is not readily available and accessible to residents. More public education and communication are needed before growth projects begin. In addition, they remarked that more transparency is needed from realtors in disclosing growth impact on property values.

A series of miscellaneous issues related to growth were also raised by infrastructure experts. Among these were insufficient beach parking for the general public and tourists (making beach access difficult), and that drainage systems and canals in the county are antiquated and undersized to accommodate growth.

Funding: Expert group participants agree that there is a lack of diversified funding sources for transportation and insufficient funding to cover existing needs. Gas taxes, the main source of funding for transportation and infrastructure, have been capped for a long time and revenue is going down. According to the experts, many projects (e.g., those in the watershed management plan) have no funding allocated to them. Participants believe that available funding needs to be prioritized, and maintenance expenses need to be included in future growth budgets.

On the positive side, experts noted that there are over \$300 million dollars programmed in the MPO-DOT plan over the next five years for projects in Collier County. The county is also looking at new sources of future funding, including a ballot initiative to consider a sales tax that could help ease the backlog of new roads needed. Group members feel legislators would benefit from more education about the realities on the ground in order to make more informed decisions.



SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County questions focused on public space maintenance and growth management. Respondents were asked if they believed that the residences of their community were well-maintained. A little more than 82% of residents agreed or strongly agreed that their community was well-maintained. In addition, respondents were asked if residents in their community had access to clean outdoor facilities. A little more than 81% of residents agreed or strongly agreed with this statement. When asked if they were satisfied with public building maintenance in their community, approximately 74% of residents indicated that they were satisfied or very satisfied with this issue. About 82% percent of residents indicated that they were satisfied or very satisfied with the maintenance of streets and roads. Differences in responses at the zip code level will be discussed in the community differences and disparities section below.

Overall, residents had more mixed opinions with regard to growth management. About 44% of residents indicated that they were satisfied or very satisfied with their community's growth management, while 36% of residents were dissatisfied or very dissatisfied. About 20% of the respondents replied that they didn't know whether or not they were satisfied or dissatisfied with growth management (Figure 19). Responses to the question regarding growth management did not vary significantly at the zip code level.

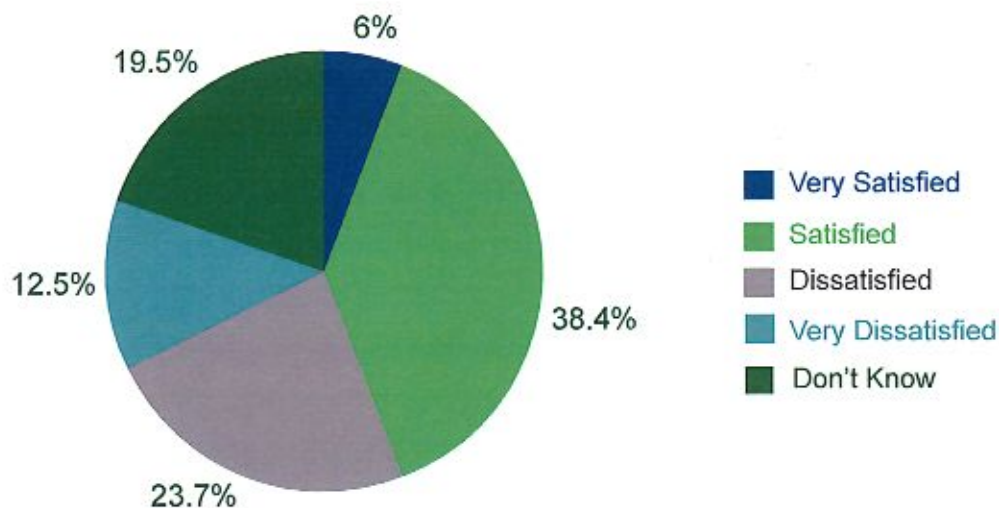


Figure 19. Satisfaction with Growth Management
CC-CAS, Q-Q Research (2017).

ENVIRONMENT

More than half of the land in Collier County (68%) is designated as conservation land. Collier County developed a conservation plan that involves growing in the community while preserving the natural environment. Given the recent and projected growth, many residents have growing concerns related to the impact on the environment. The research team discussed these issues with focus groups and included questions related to these issues on the CC-CAS survey.

FOCUS GROUP REACTIONS

Growth Related Impact: According to expert participants, roads in Collier County are at capacity, and more 4-6 lane roads are being built for a car-centric culture among residents. High traffic volume affects residents' quality of life, and negatively impacts wildlife habitats. Advocates feel that a focus on beach access and parking overlooks the threats to beaches' natural carrying capacity. The group feels high density urban plans are not popular among developers who favor single family homes and golf courses. Under the leadership of the City of Naples, the city is starting to attract new residents looking for more walkable and accessible communities without relying on cars; and developers are starting to respond to their wants. Experts feel density also benefits traffic and wildlife habitat preservation. Planning for new, mixed urban designs would require changing zoning regulations and support from politicians who are not yet fully on board. Advocates applaud the county's set aside of 25% of residential development land for native habitat preservation, but see it endangered by developers favoring growth over natural preserves. Group participants point that developments built on low lands and flood plains are using fill to raise the property, which raises concerns over depleting natural drainage areas and worsening the danger of flooding.

Water related issues: Storm-water drainage issues are a high concern for this group of experts and advocates. They point out that water could be re-used and distributed more effectively instead of being returned to the Gulf. According to participants, saltwater intrusion due to lower aquifer levels and sea level rise is getting worse, and the need for water desalinization will increase. Sewage connections to main lines from new developments further away are needed; rural areas rely on wells for drinking, and have no septic systems. Flooding is a big issue in Golden Gate Estates. Pesticides and animal waste runoffs and other toxic waste are contaminating drinking water and the Gulf. Collier residents have high water use to irrigate lawns and golf courses, and permitting agencies are over-allocating water permits to new development. Some promising initiatives around water quality include a watershed management plan adopted in 2011, including positive structural and operational elements and discussions of a small water utility fee based on usage.



Wildlife: To these expert advocates, loss of habitat, on land and wetlands, due to development is the major issue. Uplands are serving as refuge to lowland species extricated by development, but there needs to be a balance between them so they can function well. Pythons in the Everglades and feral cats in urban areas are a threat to other species. Group participants felt very strongly that human needs have to be balanced against animal needs.

Advocacy: Experts noted that the county has many environmental groups and activists who are working with landowners on the issue of growth management in eastern rural areas. While non-profits do a good job educating school age children about environmental issues and conservation, more education is needed. Experts and advocates in the group feel that adult residents, developers, and politicians also need more education on water quality, conservation, and threats to the environment.

Sea level rise: Finally, experts noted that the Southwest Florida Conservancy has a task force developing recommendations to the board on this issue. Contingency plans are needed for the county, but there is no current political debate on sea level rise. They noted that the study is currently being conducted on this issue and that county commissioners have expressed interest in their future findings.

SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County questions that focused on the environment. Respondents were asked if they believed that people and wildlife successfully co-exist in their community. A little more than 65% of residents agreed or strongly agreed with the above statement, 24% disagreed or strongly disagreed. In addition, respondents were asked if they believed that in their community, the environment was being protected while managing growth (Figure 20a). A little more than 56% of residents agreed or strongly agreed with this statement, while 33% disagreed or strongly disagreed. When asked if beaches, rivers, and estuaries had clean water, approximately 65% of residents indicated that they agreed or strongly agreed, while 27% indicated that they disagreed or strongly disagreed. Approximately a quarter of residents are concerned with environmental issues in their communities.

When asked if they were satisfied with available services related to environmental awareness, a little more than half the respondents (55%) indicated they were satisfied or very satisfied with this issue, 26% indicated they were dissatisfied or very dissatisfied, while 19% said they did not know (Figure 20b). Finally, residents were asked if they were satisfied with their community's air quality, water quality, and green spaces. Most respondents indicated that they were satisfied or very satisfied with their community's air quality (87%), water quality (72%), and green spaces (70%). Differences by zip code are discussed in the sections that follow.

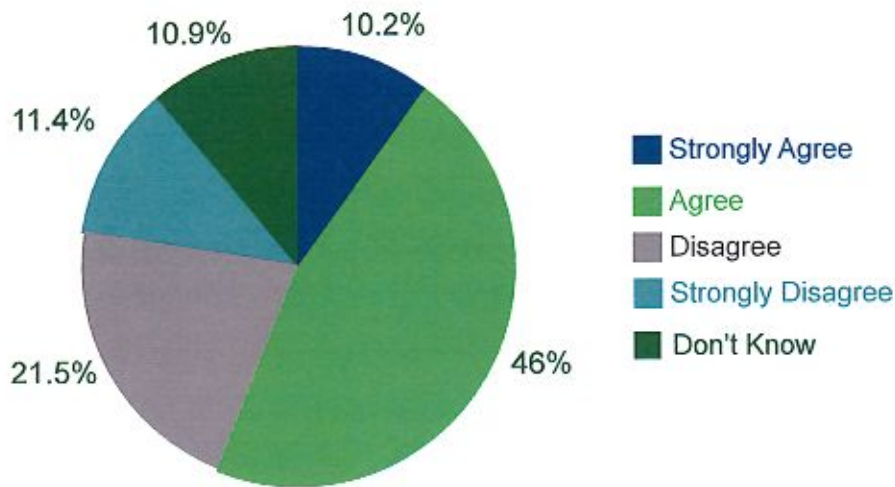


Figure 20a. Environment Protected during Growth
Source: CC-CAS, Q-Q Research (2017).

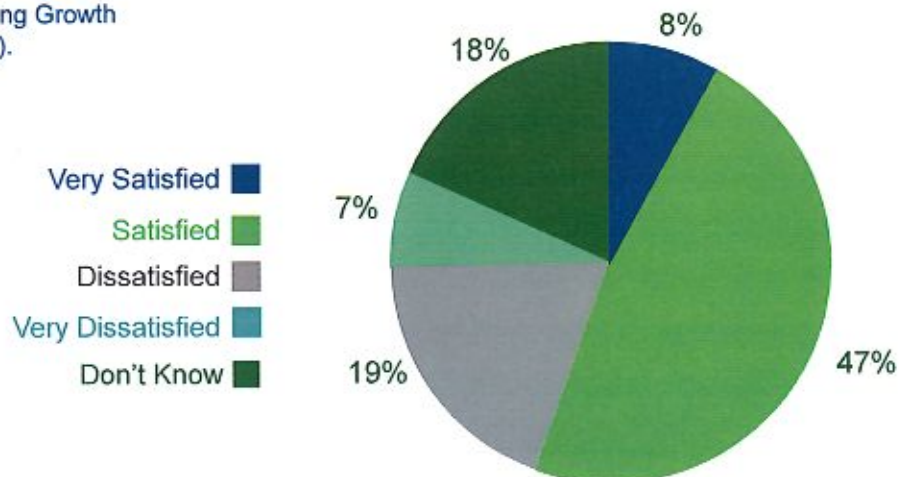


Figure 20b. Satisfaction with Environmental Awareness Services
Source: CC-CAS, Q-Q Research (2017).

COMMUNITY DIFFERENCES AND DISPARITIES

The housing and property conditions in the Immokalee community have been significantly poorer than the conditions in the county as a whole. According to the Immokalee housing study, overall housing and property conditions have improved significantly in Immokalee since 2004, but still remain problematic. As of 2010, 86% of the available housing was evaluated to be in "standard condition" compared with 57% in 2004.⁸⁶ According to the evaluation, improved conditions were related to better code enforcement, a site improvement plan process that was developed for mobile home parks, the existence of new units, coupled with efforts focused on rehabilitating the community's housing market, increased number of new units, and major efforts by nonprofit organizations that have repaired and rehabilitated many housing units in Immokalee. The report indicated considerable efforts would be necessary to maintain improvements and to address the housing that was still considered sub-standard.⁸⁷

The CDP of Immokalee has been designated as an area within the Southwest Florida Promise Zone.⁸⁸ Primary goals of the promise zone initiative are upgrading water and wastewater systems, public transit, roads and street lights throughout the region. In addition, sidewalks are needed for residents to safely connect with each other.

FOCUS GROUP REACTIONS

An expert-led focus group was conducted with Immokalee residents. According to group participants, a shortage of low-income housing and too many regulations and requirements force poor families to live in dilapidated housing (mostly trailers) owned by landlords who lack concern for tenants, the neighborhoods, and the community interests. Rent abuse and overcrowding are prevalent in their community. Many families do not meet the requirements for low-income housing, like the housing available in Habitat Village, but still cannot afford suitable housing. Horizon Village provides affordable housing for single agricultural laborers, but many choose not to live there due to strict rules and regulations.

In addition, an expert-level focus group was conducted with residents that are part of Collier County's Haitian community. According to group participants, poor Haitians are affected by the high housing costs and shortage of affordable housing in Collier County. Many members of the Haitian community who work in service industries live in Lee County or the town of Lehigh and work in Naples. They feel that low-income housing is not welcome in many communities. The group also agreed that there is inadequate public transportation for low-income working residents without cars. Buses take too long, routes are limited, and stops are not safe. CAT buses provide some service, but the demand is greater than the supply.

COPELAND, CHOKOLOSKEE, EVERGLADES CITY,
GOODLAND AND IMMOKALEE
HAVE DIFFERENT OPINIONS ON
ENVIRONMENTAL
MAINTENANCE
THAN THE REST OF COLLIER COUNTY.

SURVEY: COLLIER COUNTY OPINIONS

According to results of the CC-CAS survey, only 38% of residents living in the following zip codes agreed or strongly agreed that their communities were well maintained: 34137, 34138, 34140, 34142, and 34143. These zip codes correspond to the following communities: Copeland, Chokoloskee, Everglades City, Goodland, and Immokalee. This represents a 44% difference from the 82% of residents in the county overall who indicated that their communities were well maintained. In the same zip codes, only 38% of residents agreed that residents in their community had adequate access to clean outdoor facilities, as compared to 82% of the county overall. In the same zip codes, when asked if they were satisfied with public building maintenance in their community, approximately 38% of residents indicated that they were satisfied or very satisfied with this issue, as compared to 74% of the county overall. About 45% percent of residents in these zip codes indicated that they were satisfied or very satisfied with the maintenance of streets and roads, as compared to 82% of the overall county.

Residents in 34137, 34138, 34140, 34142, and 34143 were about 10% more likely to state that they did not know if people and wildlife successfully co-existed in their community or if the environment was being protected while managing growth. Their rates of disagreement were generally similar to the county as a whole.


In 34137 (Copeland) and 34142, 34143 (Immokalee) residents were more likely to disagree or strongly disagree when asked if beaches, rivers and estuaries had clean water; only 34% of residents indicated that they agreed or strongly agreed (as compared to 65% in the overall community), while 49% indicated that they disagreed or strongly disagreed. Approximately half of the residents are concerned with clean water issues in these areas. Finally, residents in these 3 zip codes were less satisfied with their community's air quality, water quality and green spaces. Fewer respondents indicated that they were satisfied or very satisfied with their community's air quality (60%), water quality (55%), and green spaces (45%) (as compared to 87%, 72%, and 70% respectively in the overall community).

KEY POINTS

Essentially 40 % of Collier County residents qualify as "housing-cost burdened"; those who are paying more than 30% of their monthly income on rent or mortgage. High housing costs can lead to poor housing conditions, which differentially impacts low-income residents. This can result in substandard housing which is a concern in the Immokalee area.

Housing costs are a major component of the overall cost of living for individuals and families in Collier County, where housing costs are high. The availability of affordable rental housing options has an impact on the quality of life of lower-income families.

Most residents in Collier County commute using their own vehicles and very few used public transportation, citing lack of options. Those who have to commute long distances to work have an additional transportation cost burden that can further impact quality of life.



Overall, residents in Collier County were **generally satisfied** with the cleanliness of their community and with **public space management**. This trend did not hold for the communities of Copeland, Chokoloskee, Everglades City, Goodland, and Immokalee, whose residents were **generally dissatisfied** with the maintenance of their community. In addition, Copeland and Immokalee were also less satisfied with their air quality, water quality, and green spaces.

According to expert participants, roads in Collier County are at capacity, and more 4-6 lane roads are being built for a **car-centric culture** among residents. High traffic volume affects quality of life of residents and negatively **impacts wildlife habitats**.

There are **several environmental concerns** and issues raised by experts, including growth related environmental impact, water quality concerns, and sea-level rise. Residents could use **more education** on how these issues affect their communities.

SERVICE ENVIRONMENT (HEALTH CARE, EDUCATION, AND SOCIAL SERVICES)

INTRODUCTION

Access to comprehensive and high-quality medical care are essential to ensure optimal health. In order for an individual to obtain this type of care, a person must know how to access the health care system, they must be able to get to the location where services are provided, and they must find a provider who they can trust and communicate with.⁸⁰ Common barriers to accessing the system include a lack of provider availability, high cost of care, and a lack of insurance coverage. Inadequate insurance coverage is highly correlated with failure to receive necessary medical care. When health care services are delayed or not received, residents have unmet health needs that can lead to preventable illness and hospitalization. In addition, patients face preventable hospitalizations, delays in receiving care, inability to get preventive services, and other unmet health needs.⁹⁰ While oral health is separate from general health care insurance coverage, oral health is also vital to one's health. Good oral health is related to disease prevention (e.g., gum disease, oral cancer).⁹¹

For most individuals, a primary care provider (PCP) represents an initial point of contact for most medical issues.⁹² Access to a PCP is essential to improve health outcomes, especially those associated with chronic conditions that require the implementation of management strategies (e.g., diabetes, heart disease). As such, a critical component for a community to be healthy is an ample supply of PCPs for the population. In fact, adequate PCP to population ratios have been associated with improved health and lower rates of infant mortality and with lower rates of mortality from conditions such as heart disease and cancer. Communities with a greater focus and emphasis on primary care have fewer health disparities and better health outcomes for residents.⁹³

Educational status is strongly correlated with population health status.⁹⁴ Educational attainment is associated with well-being, health related knowledge and healthy behaviors, income and employment status, and a host of social and psychological factors. The benefits of an education exist at various levels including the individual level (e.g., individual skill building) and the community level (e.g., impact of an educated workforce on community well-being). Schools and other educational and social services play a major role in the overall development of a community and function to improve the lives of children and adults.⁹⁵ Schools, along with educational and other social service programs, seek to improve resident's lives by educating them and by providing them with proper nutrition and other amenities required for healthy living.



DATA

HEALTH CARE SERVICES AND HEALTH INSURANCE

In 2016, there were 232 primary care physicians (PCPs) and 357 mental health care providers (MHCPs) operating in Collier County. Since 2013, the number of PCPs has increased 8% and the number of MHCPs has increased 320%. In the same year, the ratio of PCPs to population was 1433:1 (compared to the state's ratio of 1387:1) and the ratio of MHCPs to population was 977:1 (compared to the state's ratio of 689:1).⁹⁶ Although the ratio of PCP providers to residents is higher than that of the state, Collier County has a PCP provider shortage for the Immokalee/Everglades service area.⁹⁷ As of September 2016, a total of 80 registered "Health and Mental Health" nonprofit organizations were registered in Collier County. The percentage of non-profits listed as health or mental health was only 5.2%, which is lower than the rate for the State of Florida.⁹⁸

In 2016, it was estimated that 58,901 residents (or 16.2% percent of the total resident population) in Collier County were uninsured.^{99, 100} This is an improvement from 2010 in which 23.2% were uninsured. Health insurance rates vary by age and gender. Males are more likely to be uninsured than females (except from ages 18 to 24) and working age adults (ages 18-64) are more likely to be uninsured than children or the elderly (Figure 21). Males ages 25-34 are most likely to be uninsured. It was estimated that approximately 16.5% of residents in Collier County could not see a doctor due to costs.¹⁰¹

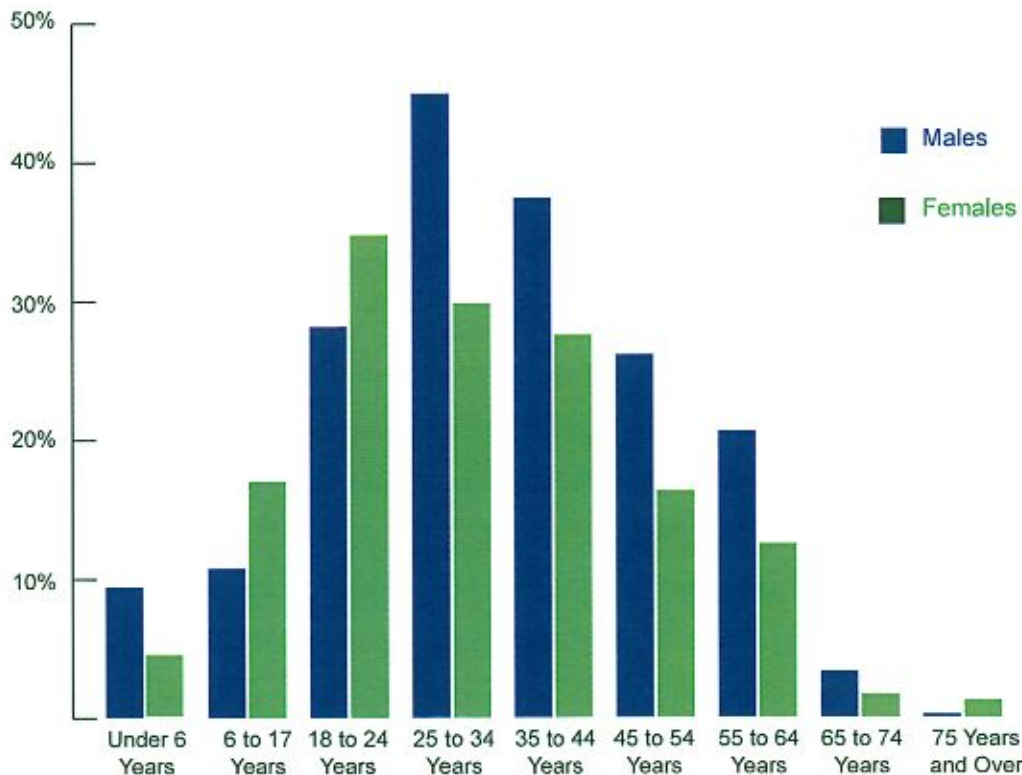


Figure 21. Percentage of uninsured residents in Collier County (Health Insurance), 2016

Source: 2016 ACS 1-year Estimates

Retrieved from: <https://factfinder.census.gov>

In 2016, the Collier County Community Health Assessment (CC-CHA) was conducted by the Florida Department of Health in Collier County. The report included an assessment of community needs as they related to the local public health system. The CC-CHA engaged residents in focus groups and surveys to assess the needs of the community related to health and health care. Key findings from this report are presented in the paragraphs that follow.¹⁰²

According to the CC-CHA, private health insurance coverage is a necessity for working Americans ages 18-64 in order to have adequate access to affordable medical care.¹⁰³ With the recent changes to the law involving the Affordable Care Act (ACA), the uninsured rate in Collier County and in Florida has been decreasing steadily. With the uncertainty surrounding the future of the ACA, it is unknown as to whether this trend will continue or reverse.

The CC-CHA discussed needs and gaps in the Collier community with respect to health care. There is a movement of PCPs in Collier County to become concierge providers.¹⁰⁴ Concierge providers ask patients to pay an annual retainer (usually between \$1,500 – \$5,000) which is not covered by insurance carriers.¹⁰⁵ This allows patients direct access to their physician, with many extra benefits. Due to the highly personalized nature of the practice, most concierge medical practices limit their patient base. This trend is creating an access issue within the community. In addition, residents experience long wait times to see a physician during peak season. The assessment reported limited access to women's reproductive healthcare services.

For low-income residents, transportation barriers may limit healthcare access. The authors noted that the administrative burdens of Medicare resulted in a reduced number of PCPs that service Medicare/Medicaid recipients. The study also reported a shortage of beds in long-term care facilities for Medicare/Medicaid recipients. Finally, the ER is often used in lieu of a PCP based on its 24-hour availability.¹⁰⁶

In addition to the above, the CC-CHA reported that the community was well aware of the need for more mental health services and pointed to a gap in services with respect to mental healthcare. As stated previously, statistics indicated over a 300% increase in the number of mental health providers in Collier County from 2013-16.¹⁰⁷ Despite that increase, ratios of providers are below state and national averages. With regard to assisted living facilities, there is more of a market in the community for high-end assisted living facilities, despite the growing need for affordable long-term care assisted living facilities for middle and low-income residents.¹⁰⁸

Regarding oral health, the CC-CHA stated that the number of dentists in Collier County increased by almost 60% over a 10-year period ending in 2013. However, the majority of dentists are in private practice. Of note, was the lack of dental care options for low-income adults. Lower-income adults lacked the resources to secure preventative dental services and often used emergency room services for emergency dental care.¹⁰⁹

80% OF PARTICIPANTS IN THESE FOCUS GROUPS BELIEVED THAT **MENTAL HEALTH** AND **SUBSTANCE ABUSE** ISSUES ARE **MAJOR** PUBLIC HEALTH PROBLEMS.

FOCUS GROUP REACTIONS

Several concerns raised in the CC-CHA were echoed by participants of an expert-led focus group held on the topic of housing. These experts discussed issues related to health care affordability and accessibility, mental health and substance abuse care, community prevention, and public health improvement.

With regard to health care affordability and accessibility, experts stated that most children in Florida have health coverage through KidCare, and Federally Qualified Health Care Centers (FQHCs) offer affordable medical care, dental, eye care and mental health services to children in Collier County. Through a unique program, NCH health care system, which encompasses the largest local hospital and several specialized health care centers, has placed nurses in all schools and uses tele-medicine, sharing costs with the school system. Also, the program provides trainers for sport teams in high schools. Group participants felt that access to pediatric specialists, however, is limited, and for working parents, getting time off from work to take children to doctor's appointments is a challenge.

Older, low-income adults have adequate Medicare and Medicaid coverage. According to the group, some seniors still face coverage gaps when it comes to skilled residential care. There is a shortage of beds in these types of facilities. The lack of assisted living facilities (ALFs) discussed previously with respect to housing is also a healthcare concern, as ALFs provide housing and health care. Recently, Hurricane Irma revealed a shortage of shelters and inadequate infrastructure to care for older adults with medical needs in residential placements during emergencies. The health experts stated that outside of the elderly, low-income adults in the county include large numbers of uninsured residents who did not qualify for ACA and suffer from chronic health and mental health problems.

Another topic of discussion was related to mental health and substance abuse care in the community. The expert panel agreed that the David Lawrence Center is an asset to the community as a provider of mental health and substance abuse services. However, experts reported it only has 66 in-patient beds.

The county's sheriff's office is the largest source of mental health referrals for mental health services in the county. A majority of prison inmates have diagnosable mental health problems that are not being treated, according to the group. Drug education is provided in the community and in schools through the David Lawrence Center and Drug Free Collier County. Schools offer the "Hidden in Plain Sight" program to educate parents about drug use, and Operation Medicine Cabinet helps people dispose of medications kept at home. Group participants expressed concerns that opioid related mortality is increasing in Collier County, as it's the #1 treated condition in the detox center at David Lawrence.

When discussing community prevention and public health improvement programs, the expert panel spoke about the implementation of the Blue Zone project in the county. The Blue Zone project involves a national best practice approach to community prevention and health improvement. NCH is fully funding the program and working with a variety of community partners to implement it. Some of its current focus areas include walkability and bikeability issues, reduction of hospitalizations and emergency room visits, and nutrition. The project collects community level data via annual surveys in English and Spanish. NCH is a leader in employee health promotion in the county with the goal of reducing health care utilization in their own setting, and is helping the private sector do the same. It also promotes baby friendly practices, such as breastfeeding rooms to promote lactation.

Expert participants also shared that the school system has a Safe Routes to School program to encourage children to walk or bike on a daily basis. Experts agree that the "Complete Street" program, men-



tioned previously, which aims to increase street access and safety for pedestrians and bikers, should be extended to under-served areas of the county, such as Immokalee.

Finally, experts noted that many private physicians in the county work as volunteers in community clinics, increasing access to specialists for low-income residents. These volunteers are able to offer culturally-competent care in seven languages. Overall, Collier County's small size and abundance of philanthropically minded residents provides an opportunity for effective practices to produce quick results.

Issues related to health care were also brought up by community residents during the volunteer-led focus groups. Many residents expressed that the healthcare system was not adequately prepared to sustain the seasonal influx (population). Too few physicians (both generalists and specialists), clinics, and Medicare accepting physicians were cited as problems across zip codes. Eighty percent of participants in these groups believed that mental health and substance abuse issues are major public health problems. In addition, residents believe that there are root social environment issues, as well as access and service issues, not allowing for solutions to the problems. There is a broad belief that the substance abuse issues transcend age, race, and socio-economic status. Both prescription drugs and alcohol seem to be substances of concern for most. Several groups also referenced the county jail as the biggest mental health facility, indicating the lack of specialized care and/or access to mental health care within their community. One participant even praised the Sheriff's office and county law enforcement, remarking that the largest mental health facility is the jail.



SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members who live and work in Collier County a series of questions focused on healthcare access, affordability, and services. Respondents were asked if they believed that basic, affordable health care was available for children and the elderly in their communities. In general, residents agreed more often that this type of care was available for children more than for the elderly. Overall, half of respondents (50%) agreed or strongly agreed that care was available for children (Figure 22b), while only 41% agreed or strongly agreed that this care was available for the elderly (Figure 22a). When asked if residents in their community had access to affordable medical care without referring to a specific population, responses were somewhat similar to the above with 47% of participants agreeing or strongly agreeing, and 35% disagreeing or strongly disagreeing. When asked if residents had access to affordable health insurance, only 33% of residents agreed or strongly agreed, while 46% disagreed or strongly disagreed. Participants were also asked if they believed that the uninsured had access to medical care in their community. Overall, 40% of respondents agreed or strongly agreed, 32% disagreed or strongly disagreed, and over a quarter of the respondents (28%) didn't know. Residents feel access to affordable health insurance is an issue and that access to affordable medical care without insurance is also problematic. Taken together, this can be interpreted to mean that access to health care services for lower income groups is viewed as very difficult.

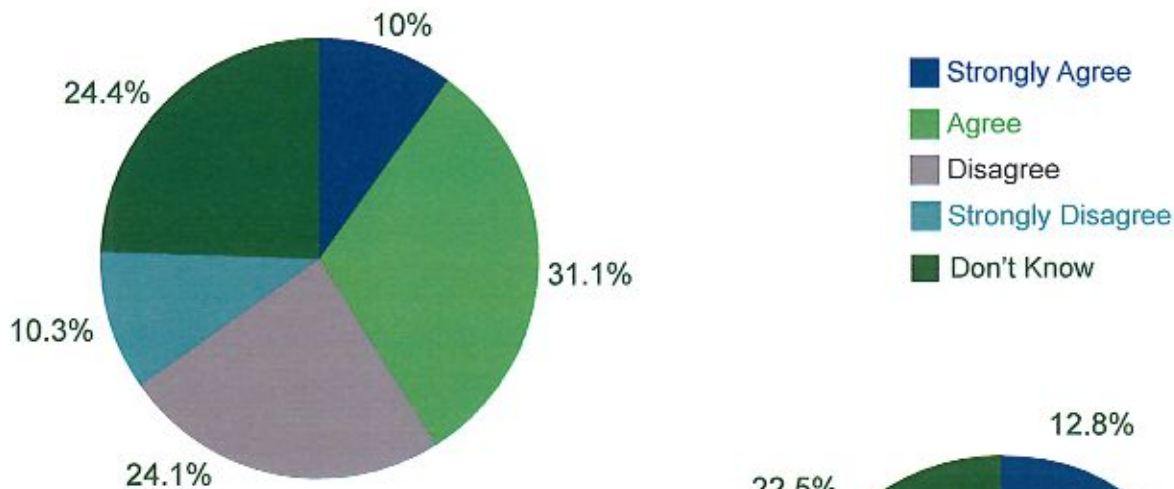


Figure 22a. Affordable Basic Health care: Elderly
Source: CC-CAS, Q-Q Research (2017).

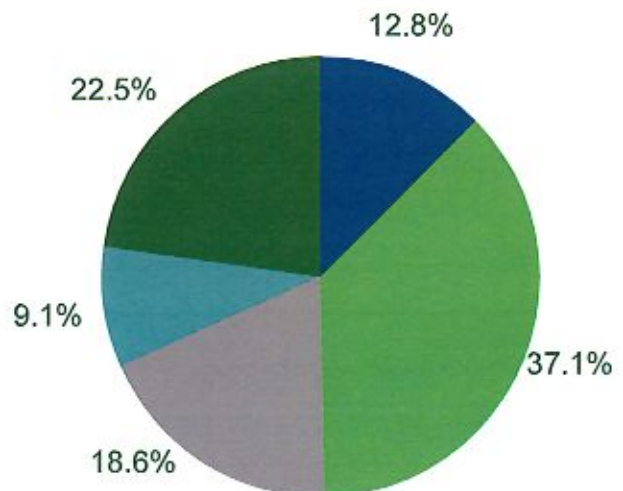


Figure 22b. Affordable Basic Health care: Children
Source: CC-CAS, Q-Q Research (2017).

Opinions regarding the availability of dental care and mental health care aren't as positive. Respondents were asked if they believe that residents in their communities had access to affordable dental care. Only 34% of respondents strongly agreed or agreed with the above statement, while over 45% of respondents disagreed or strongly disagreed with that statement (20% didn't know) (Figure 23). Taken together, while many in the community feel that basic health care is available, access seems to be determined by socio-economic status.

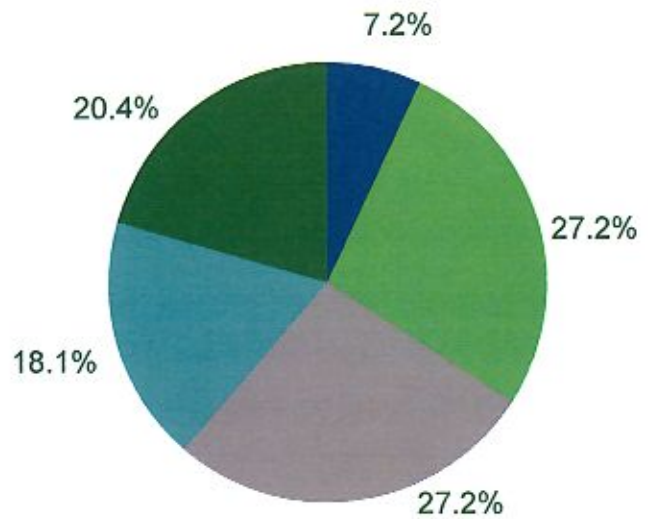


Figure 23. Affordable Dental Care Availability
Source: CC-CAS, Q-Q Research (2017).

When asked if enough mental health services are available to meet the needs of residents, a little more than a quarter (27%) of respondents agreed or strongly agreed, while 46% disagreed or strongly disagreed (27% didn't know) (Figure 24a). Similar percentages of residents agreed to questions regarding the availability of addiction treatment options. A little less than a quarter (25%) of respondents agreed or strongly agreed, while 45% disagreed or strongly disagreed (30% didn't know) (Figure 24b). When residents were asked if they were satisfied with the addiction services in their community, only 26% responded that they were satisfied or very satisfied, while 32% stated that they were dissatisfied or very dissatisfied (43% didn't know). Generally, residents felt more positively regarding the availability of prenatal services in their community, more than half (60%) of respondents agreed or strongly agreed, while only 11% disagreed or strongly disagreed (28% didn't know). Zip code differences will be discussed in the community differences section below.

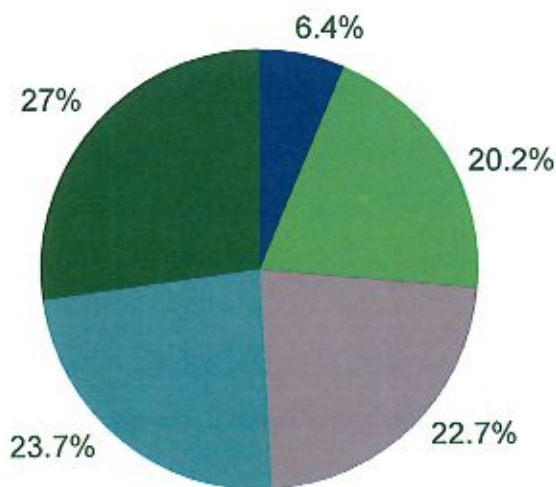


Figure 24a. Mental Health Care Availability
Source: CC-CAS, Q-Q Research (2017).

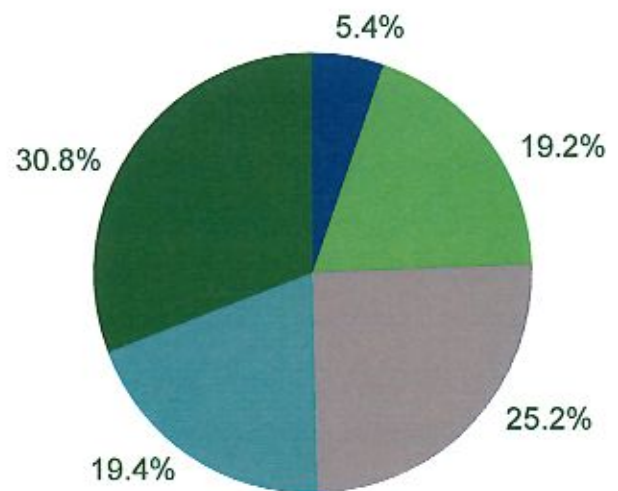


Figure 24b. Addiction Treatment Availability
Source: CC-CAS, Q-Q Research (2017).

One issue to take note of is the percentages of participants who were uninformed about health care issues, responding that they “didn’t know” about health care services other than basic care. For many questions, at least a quarter of the sample indicated that they didn’t know if specific health care services (i.e. dental, mental health, addiction, prenatal) were available. This could be because the participants had not sought out that type of care, or it could indicate the public’s lack of awareness regarding health care service issues.

EDUCATION

In 2016-17, Collier County Public Schools (CCPS) served a diverse population of 49,394 students in grades K-12: 49% of students in grades K-12 were Hispanic, 34% were white and 11% were black.¹¹⁰ Approximately, 64% of students qualified for Free or Reduced-Price Lunch (FRL), which is often used as an indicator of economic need. A significant percentage of students (9%) were classified as migrant students (i.e., their parents are migratory or agricultural workers). Migrant students are considered to be at risk education-wise, as constant relocation leads to educational discontinuity creating impediments to progress and a possible dropout scenario.¹¹¹ Approximately 16% of students were classified as English Language Learners (ELL), meaning that English was not their first language. These students are provided with additional services designed to help them reach proficiency in English. More than 55% of CCPS students in grades K-3 (the time during which children learn to read) are living in homes in which English is not the first or primary language spoken.

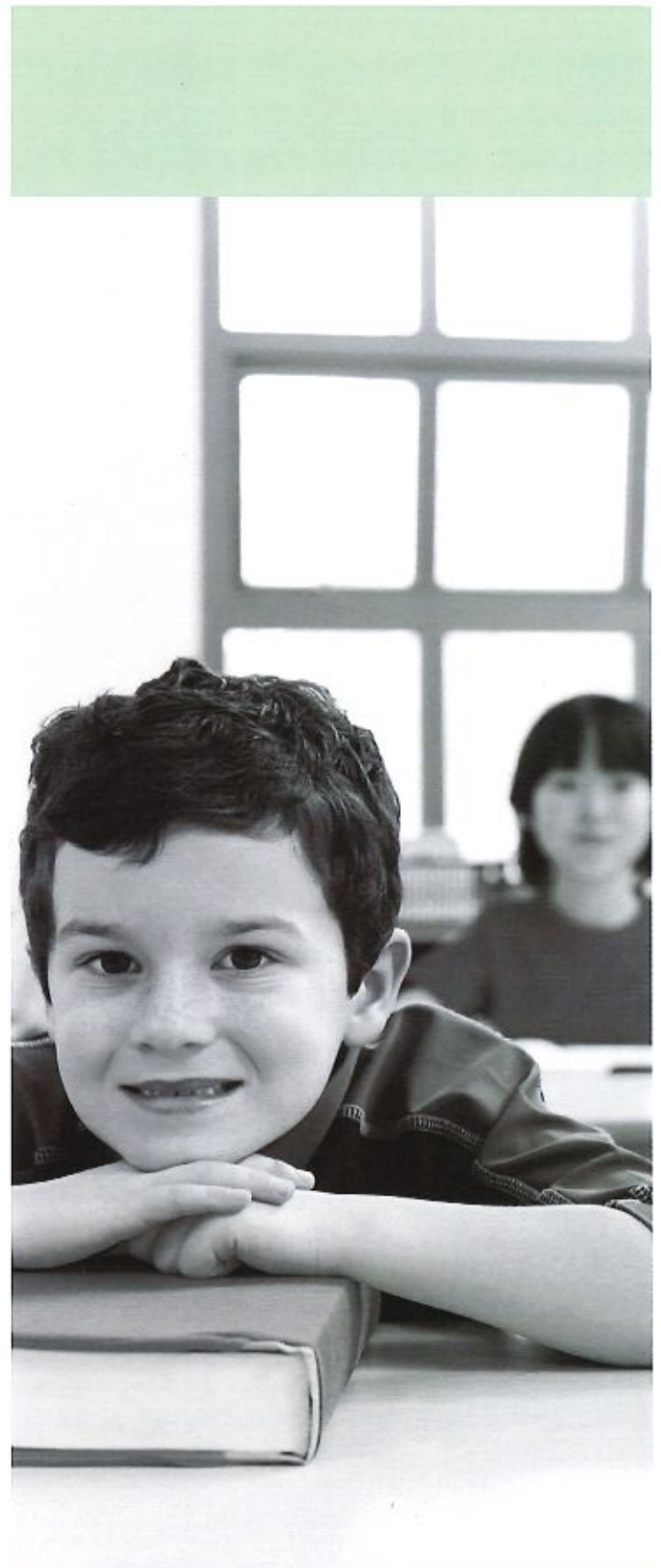
CCPS employs approximately 3,200 certified teachers, and almost half hold advanced degrees. The District also receives assistance and service from over 5,500 volunteers each year.¹¹² The State of Florida’s accountability system provides school grades of “A” through “F” to each public and charter school. The grading formula used focuses on the following school and district performance outcomes: student achievement, learning gains, graduation, acceleration success, and maintaining a focus on students who need the most support.¹¹³ In 2017, CCPS was one of only 11 school districts to receive an A grade by the Florida Department of Education. CCPS was the 5th ranked district (out of 67) in the state of Florida with respect to school grades, an improvement from 14th in 2016 and 33rd in 2011.¹¹⁴ The district showed growth in the number of schools earning an “A” or “B” grade, up from 53% (2016) to 74% (2017), with 46% of schools receiving an A in 2017. No school in CCPS received an F grade from the state in 2017.¹¹⁵



There are many community organizations focused on education, including early childhood and college and career readiness. One such example is Future Ready Collier (FRC), a network of more than 35+ organizations, businesses, schools and community members working to improve the lives of children and families. The FRC partners, which include RMSFF and CCPS (along with many others), have two primary goals: 1) to ensure that preschool-aged children in Collier County are school-ready by the time they enter Kindergarten (K) and 2) to ensure that young people achieve post-secondary success by graduating high school on track to obtain a degree or credential.¹¹⁶

With respect to early learning and Kindergarten readiness, FRC notes that 34% of children in Collier County are not Kindergarten (K) ready and about 4,000 economically disadvantaged children are not enrolled in a preschool program.¹¹⁷ As such, the network is focused on increasing the percentage of low-income families participating in programs/supports, increasing the number of accredited/high-quality child care slots, and increasing resources available to support early childhood development (among other initiatives).¹¹⁸

According to the most recent state data regarding K-readiness (2013-14), 75-99% of students in the poorest areas of the county are classified as FRL, which is well above the county average (currently 64%). The K-readiness range for lower income zip codes (34112, 34113, 34116 and 34142) is 40-90% with the average falling around 63% in those zip codes.¹¹⁹ In the county, only 18% of early childhood provider slots are subsidized. It is estimated that there are approximately 17,000 children ages 0-4 residing in Collier County and about 5,000 (30%) of these children are in poverty. Given that fewer than 1,000 low-income children are currently accessing subsidized preschool programs, there are at least 4,000 low-income young children not enrolled in accredited early childhood pro-



grams each year.¹²⁰ In order to measure the success of their efforts, the FRC intends to evaluate the percentage of students considered at or above reading level upon entry to K as measured by the CCPS iReady assessment. In 2016-17, only 24% of K-students enrolled in CCPS were considered to be at or above reading level during the Fall i-Ready diagnostic. By mid-year, this percent improved dramatically to 64%.¹²¹

With respect to their second goal of improving success post-high school, FRC is focused on reducing the number of students that are off track in both middle and high school, improving the high school graduation rate, and increasing the percentage of high school students completing the Free Application for Federal Student Aid (FAFSA) among other initiatives. Research has indicated that a 10% increase in FAFSA completion rate can lead to a 3% increase in students attending college.¹²²

To reduce the number of students off track in middle school, CCPS has employed an Early Warning System (EWS) and develops Students Success Plans (SSPs) for those identified as at-risk, in order to help students stay on track to graduate and achieve postsecondary success.¹²³ At the middle school level, Florida Statute dictates that the EWS must use the following indicators: attendance below 90%, one or more suspensions, course failure in English Language Arts (ELA) or Mathematics, or a Level 1 score on statewide assessments in ELA or Mathematics. If a student meets criteria for two or more indicators, a school's intervention team develops a SSP. As of March 2017, there were 1,257 students in grades 6 through 8 who exhibited two or more indicators and consequently had an SSP. The students identified as at-risk were more likely to be male (68%) and often struggled in reading. Interventions often included support for literacy and numeracy skills and mentorship for students.¹²⁴



In order to assist students with the post-high school transition, at the high school level, CCPS offers two types of dual enrollment opportunities to students 1) academic programs and 2) career education programs.¹²⁵ Academic dual enrollment allows students to simultaneously earn high school and college credits. CCPS partners with Edison State college to offer programs in teacher education in Naples, Immokalee, and Lely High Schools. In Lely High School, students can earn college credit in Aerospace Technology/ Aviation through Embry Riddle University. Career Education Dual Enrollment allows students to simultaneously earn a post-secondary adult education certificate along with their high school diploma. This option is available through enrollment at Lorenzo Walker Technical High School and Lorenzo Walker Technical Center simultaneously or by enrolling in Immokalee High School and Immokalee Technical Center simultaneously.¹²⁶

Along with the dual enrollment opportunities, CCPS offers a variety of programming to assist students with the post-high-school transition. During the 2016-17 school year, a college night hosted by CCPS was attended by 95 colleges and universities and over 2,500 students and parents. In addition, financial aid and scholarship nights were organized at 8 high schools with 1,095 students and parents in attendance. By March of 2017, approximately 37% of students had completed the FAFSA, compared to 31% the year prior. In 2017, CCPS graduated over 2,700 students with a graduation rate of 88.2%.¹²⁷ ¹²⁸ The most recently available data indicate that in 2015, 70% of CCPS graduates were enrolled in college during the first year after high-school.¹²⁹ The majority of these students attend 4-year in state public colleges that are part of Florida's State University System (SUS).

70% OF COLLIER COUNTY PUBLIC
SCHOOL GRADUATES **ENROLL IN COLLEGE** THE
YEAR AFTER HIGH SCHOOL.

OTHER SOCIAL SERVICES

Collier County is replete with agencies and organizations providing social services and programming for residents. The United Way of Collier County sponsors the 211 hotline, a free 24-hour non-emergency human services helpline available to residents by phone or online.¹³⁰ The 211 service provides referrals to a variety of health and social services that can connect residents with services addressing a diversity of needs including food, housing, medical, and child care. According to the most recent publicly available annual report for the 2014-15 fiscal year, 211 served 6,943 residents (1,967 by phone). Counselors made 1,413 referrals for services.¹³¹

Residents are most likely to reach out to 211 in search of referrals for healthcare services, housing services, income support, basic needs, and substance abuse issues.¹³² As stated by the annual report, healthcare service referrals often include assistance with obtaining prescription drugs, medical treatment, nursing services, hospital services, dental services, optometric services, and free healthcare services. Housing service referrals frequently include helping clients locate affordable housing and income assistance for rentals, obtaining an advance for a rental security deposit, or locating temporary residences to assist with a transition. Income support referrals are provided to those with limited income and can include assistance with utilities and other basic financial obligations for residents experiencing an economic crisis. Basic needs referrals include assistance with the fundamentals needed for self-sufficiency including food and clothing. Substance Abuse referrals are made to assist individuals with addiction through their recovery process.¹³³

Furthermore, Southwest Florida Resource Link is a service provided by the Health Planning Council of Southwest Florida, Inc. (HPCSWF).¹³⁴ The mission of the HPCSWF is to improve the health and wellness of the Southwest Florida community by "promoting healthy lifestyles, reducing health disparities, increasing access to quality health related services, detecting and eliminating gaps in services, expanding knowledge through education, and by facilitating community partnerships".¹³⁵ HPCSWF has created a repository of human services available on the internet to provide a way for Collier residents to find resources that meet their particular needs.

According to the HPCSWF Collier Resource Link website, there are approximately 330 programs and organizations that provide a variety of social services to Collier residents.¹³⁶ The website lists services by category which include the following: adoption, child support, disabilities and health conditions, financial assistance, healthcare, information resources, legal services, pet services, transportation, advocacy, clothing, education and training, food, housing and utilities, insurance assistance, mental health and substance abuse, and recreation. Resources listed include activities for youth, seniors, and residents with disabilities, and include programming such as information sessions, counseling, parent training, support groups, education and training, healthcare services, and food and housing assistance.

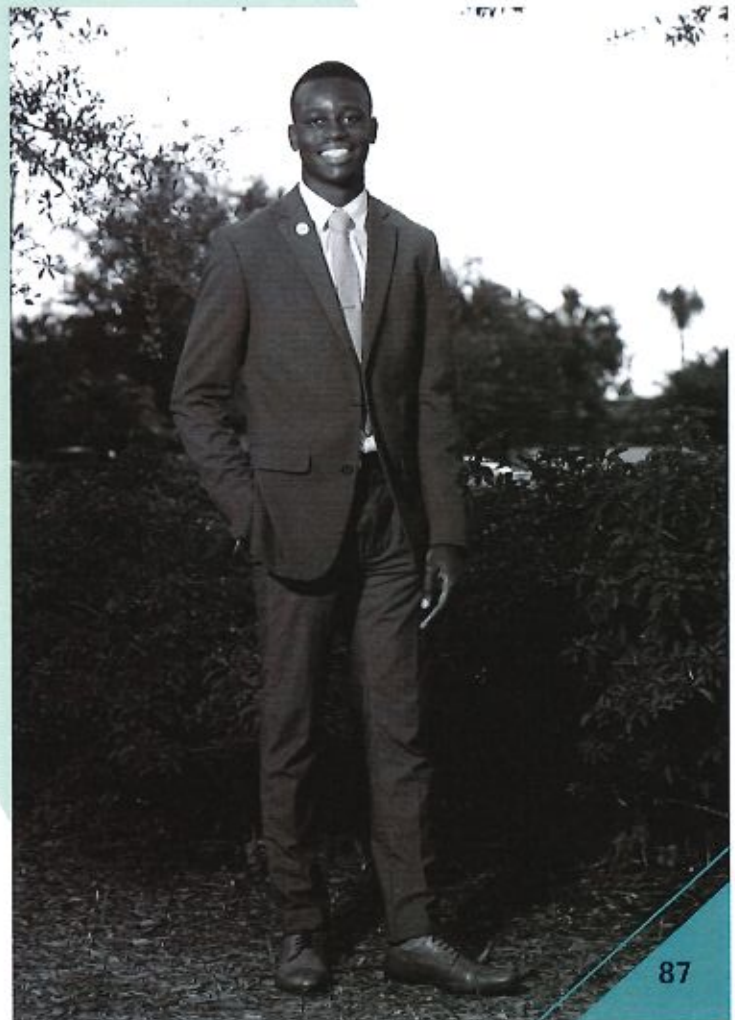
FOCUS GROUP REACTIONS

Issues related to education and social services were also discussed by community residents during the volunteer-led focus groups analyzed by the Q-Q Research team. Many of the focus group participants had little familiarity with the topics of education and childcare since the participants were often older adults who did not live with children attending school.

The younger participants with experience involving education services echoed concerns related to availability of preschool programming having an impact on school readiness. Residents stated that insufficient Pre-K slots were a concern. Many believe that early education programs (VPK, PK) have long waiting lists and/or are not entirely affordable. While VPK is provided for free for half the school day until noon, the second half of the day requires payment and families can struggle to pay for the remaining half. These concerns were amplified by the single mothers in the focus group.

On a positive note, many residents mentioned that the teaching staff within the public-school system, grades K-12, are excellent. Parents in the focus groups indicated that, sometimes, they did have difficulties connecting with school staff during a child's early learning phase and that seems to be the most prevalent hurdle they face. With respect to post-high school options, residents believe the biggest issue facing the community is an insufficient number of, and lack of, funding for vocational schools. Again, concerns were amplified by the single mothers in the focus group. Lorenzo-Walker was cited as the only option for most residents. Differences and disparities discussed by residents in the Immokalee focus group are provided in the Community Differences and Disparities section below.

With regards to social services, the focus group participants tended to believe that there are not sufficient services for senior populations, for persons with disabilities, and the general adult populations. Residents remarked that CCPS does provide services for those with special needs, but after one leaves that system, the services for the special needs population tends to diminish, leaving a service gap. Specifically, the special needs focus group participants noted that there was a dearth of quality group homes for them, and that there are insufficient services and accommodations for adults with disabilities. It is worth noting that many of the focus group participants admitted having little-to-no contact or interaction with persons with special needs. In general, there was a lack of awareness among resident participants about these types of disabilities and the needs of residents with special needs.



SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members in Collier County a series of questions focused on childcare, education and enrichment, and social services. For the analyses involving questions related to childcare, education, and services for youth, results below are reported only for those residents indicating that they were a parent of a child under 18 ($n = 1,093$). For questions regarding adult education and social services, results are reported for all respondents who indicated they resided in Collier County ($n = 3,135$). Any differences by zip code are discussed in the Community Differences and Disparities section that follows.

Respondents were asked if they believed that basic, affordable child care was available in their communities. Parents of children under 18 disagreed with this statement; only 35% agreed or strongly agreed, while 51% disagreed or strongly disagreed (Figure 25a). A little more than half (51%) of parents responded that they were satisfied with their childcare options. When asked if quality preschools were available to Collier residents, the response was more positive; 67% of residents strongly agreed or agreed with this statement (Figure 25b). In addition, a majority of parents (68%) reported being satisfied or very satisfied with the preschool options. Taken together, the majority of residents believe the preschool options available to be of high-quality, but often lacking in affordability.

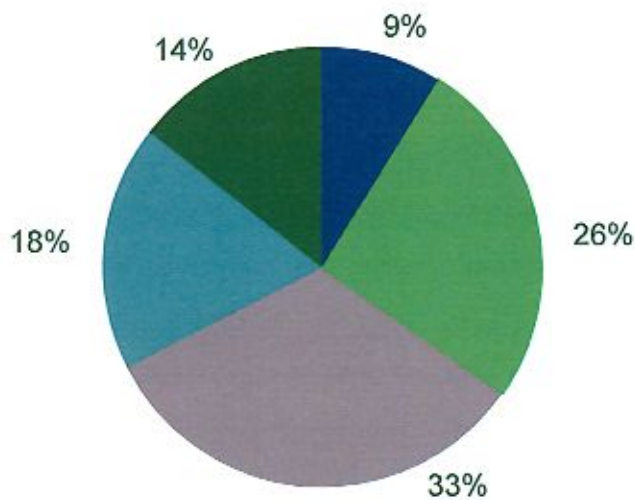


Figure 25a. Affordable Child Care Availability
Source: CC-CAS, Q-Q Research (2017).

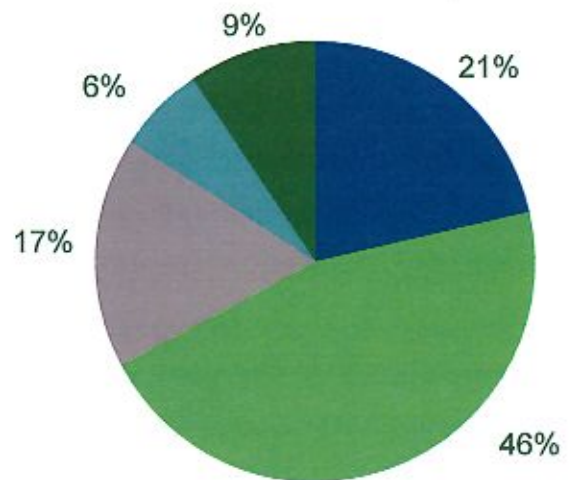


Figure 25b. Quality Preschool Availability
Source: CC-CAS, Q-Q Research (2017).

81% DO NOT THINK
THERE ARE **AFFORDABLE**
CHILDCARE OPTIONS.

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

In general, parents believe their K-12 educational system is high quality. Most parents (81%) agreed or strongly agreed that children had access to high quality K-12 programs, with 77% of parents reporting that they were satisfied or very satisfied with their K-12 options (Figure 26a). Additionally, most parents agree or strongly agree that youth in the community are graduating high school workforce or college ready (56%) (Figure 26b).

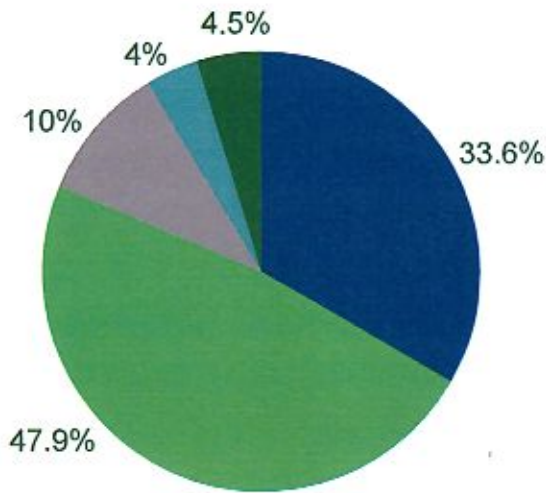


Figure 26a. Quality K - 12 Education
Source: CC-CAS, Q-Q Research (2017).

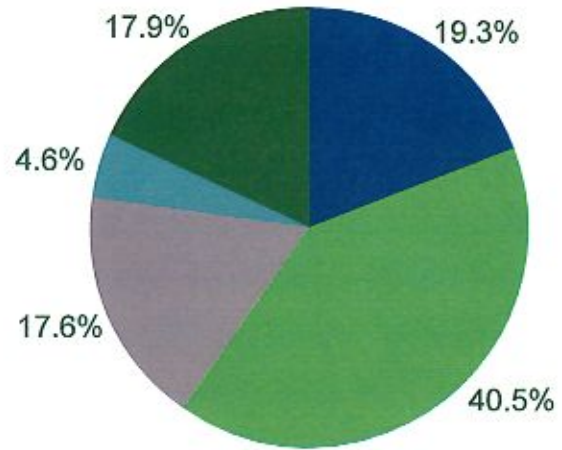


Figure 26b. Graduating Work/College Ready
Source: CC-CAS, Q-Q Research (2017).

When asked if residents in their community had access to affordable after school care programs and summer programs for their children, responses were similar, with 51% of participants agreeing or strongly agreeing with both statements (Figures 27a and b).

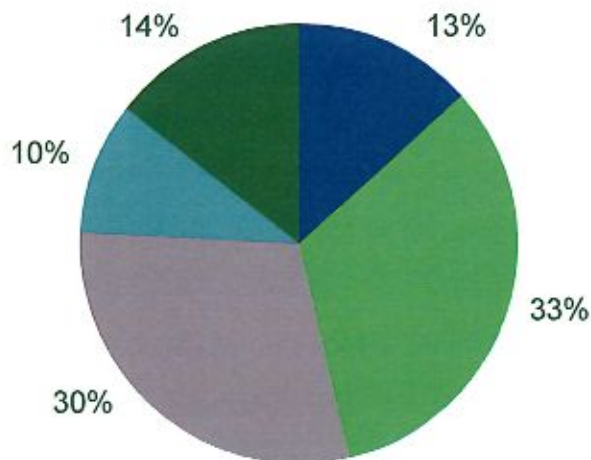


Figure 27a. Affordable After School Care Accessibility
Source: CC-CAS, Q-Q Research (2017).

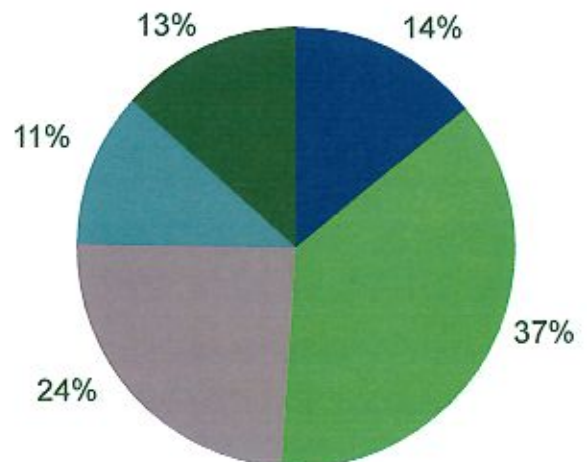


Figure 27b. Affordable Summer Program Accessibility
Source: CC-CAS, Q-Q Research (2017).

Residents were also asked if they believed that adults 18 years and older had adequate access to post-high school education in Collier County. For this question, results are reported for all respondents who indicated they resided in Collier County ($n = 3,099$). About 54% residents agreed or strongly agreed with this statement, while 24% disagreed or strongly disagreed (21% did not know). Along these lines, 57% of residents indicated that they were satisfied or very satisfied with both post-high school educational options and adult educational options (18% were dissatisfied or very dissatisfied, while a quarter of the respondents answered that they didn't know).

SOCIAL SERVICES

Upon analyzing respondent selections to questions regarding social services, the most common response was often the “don't know” option (chosen approximately 40% of the time for all questions). Given the nature of the survey questions regarding social services, it is probable that only those residents with first-hand knowledge or experience with a particular service would be likely to answer a particular question. As such, for the questions in this section regarding social services, percentages will be reported based on the total number of participants who selected a valid response, excluding the don't know option.

When asked if residents in their community who were in need had access to assistance programs, participants were more likely to agree or strongly agree (71%) (Figure 28a). When asked if they were satisfied with social service programs, only 44% of residents stated that they were satisfied or very satisfied with these programs (Figure 28b).

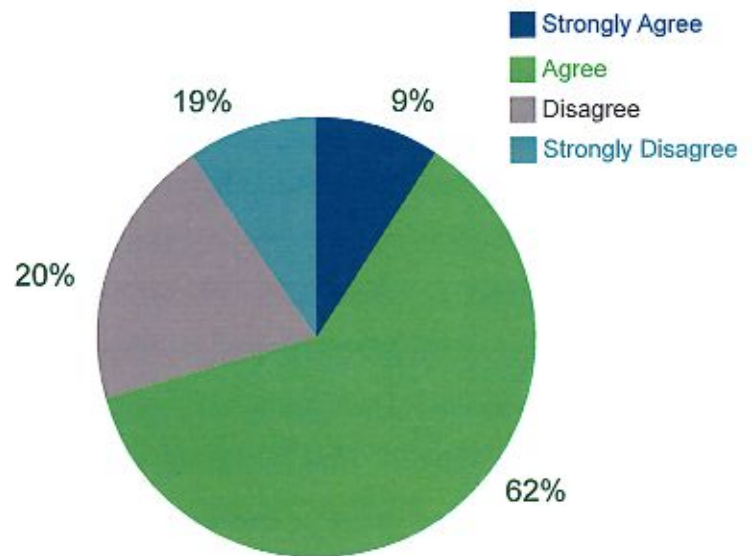


Figure 28a. Availability of Assistance Programs
Source: CC-CAS, Q-Q Research (2017).

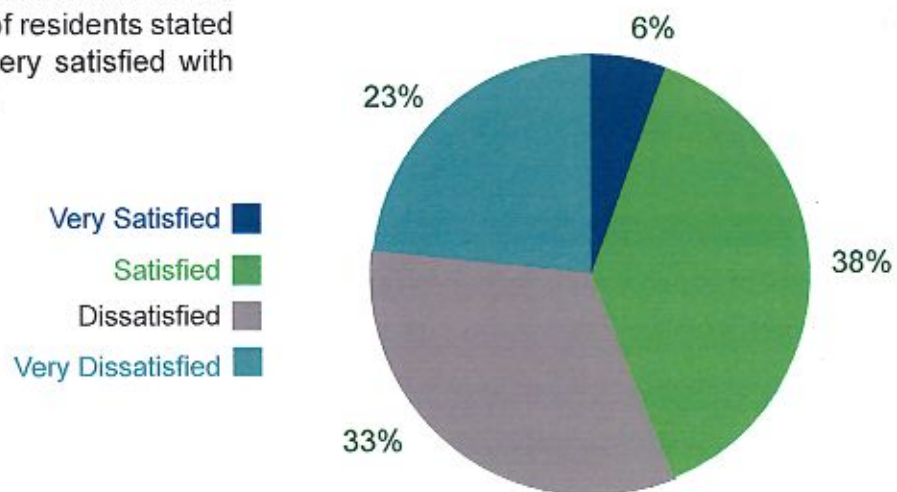


Figure 28b. Satisfaction with Social Services
Source: CC-CAS, Q-Q Research (2017).

Respondents were also asked if they believed that adequate support services were available to residents with disabilities in Collier County. Responses were mixed; about 55% of the participants agreed or strongly agreed, about 45% of the sample disagreed or strongly disagreed. About 60% percent of the respondents reported being satisfied or very satisfied with disability services.

In addition, participants were asked if they felt that adequate support services were available to the elderly in Collier County. For this question, responses are reported for the sample ages 61 and over (n = 1,047). About 59% of residents ages 61 and over agreed or strongly agreed with this statement, while 33% disagreed or strongly disagreed.

Finally, residents were asked about their satisfaction with social services for special groups including veterans, homeless, victims of domestic violence, and migrant workers. Residents were most likely to respond that they were satisfied or very satisfied with services provided to domestic violence victims and veterans, (63% and 54% respectively). Residents were less likely to indicate that they were satisfied or very satisfied with services provided to migrant workers and the homeless, (43% and 36% respectively).



COMMUNITY DIFFERENCES AND DISPARITIES

HEALTH CARE

According to the CC-CHA, White and Black residents are more likely to be insured than Hispanics. In addition, the CC-CHA reported a correlation between insurance rates and educational attainment and income level for residents of working age.¹³⁷ As education and income increased, the likelihood of being uninsured decreased. The authors posit that this relationship is largely due to employment related coverage, as residents at higher levels of education are more likely to be employed in jobs that provide benefits packages. The CC-CHA reported a correlation between receiving dental care and both educational attainment and income level. As education and income increased, the likelihood of receiving dental care also increased. Finally, the authors reported that residents were concerned about the lack of pediatric dental care options.¹³⁸

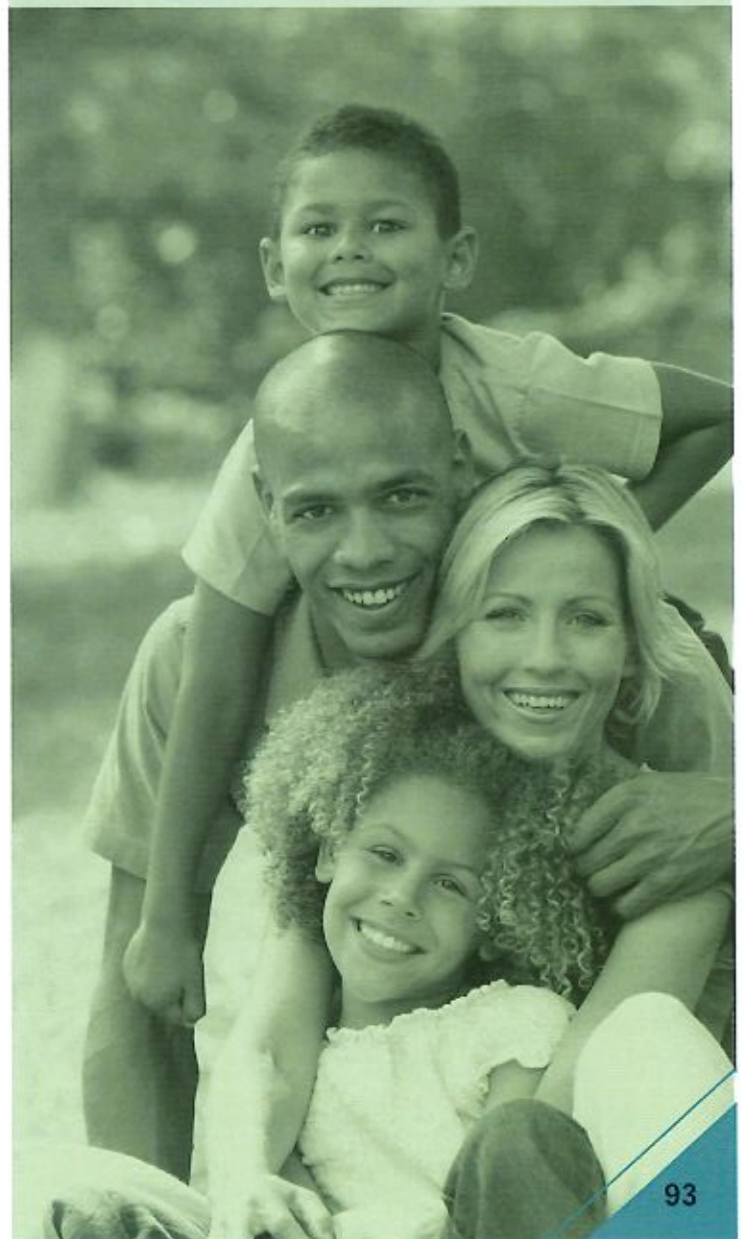
“
SUBSTANCE ABUSE
SERVICES REPRESENT
A HUGE UNMET NEED...
THERE ARE INADEQUATE
SERVICES TO HELP SUB-
STANCE ABUSE
PROBLEMS.”

FOCUS GROUP REACTIONS

A special focus group was conducted with Immokalee residents and led by the Q-Q Research team. Among other topics, the topic of healthcare and education was discussed. When asked about issues related to health care, according to group participants, most adults in the Immokalee area are undocumented and don't have any type of health care. They rely mostly on emergency room visits and the Collier County Health Clinic, which provides non-emergency family health and dental care on a sliding scale. Children from low-income homes are covered under Healthy Kids. Residents noted that the David Lawrence Center provides mental health services that they can and do access, but they remarked that services are only available 4 days a week (i.e., Monday through Thursday, 8am to 6pm) at their satellite location in Immokalee. This is problematic as many feel that community residents have the tendency to suffer from depression, stress, and anxiety, likely related to potential deportation and insecurity of relatives. Substance Abuse services represent a huge unmet need in their community. According to participating residents, alcohol abuse is related to high stress, fear of deportation, and depression. There are inadequate services to help alleviate substance abuse problems.

An additional special focus group was conducted with the Haitian residents and led by the Q-Q Research team, to ascertain their needs and opinions with regard to health care among other topics. When asked about issues related to health care, participants remarked that the majority of Haitians do not have private health insurance or Medicaid coverage, and in general, the quality of medical services for low-income residents in Collier County is lower than insured residents. Cultural barriers, such as language and mistrust of non-Haitian doctors, are also an issue facing the Haitian community. Stigma associated with mental health problems keeps Haitians from seeking help and mental health services. Alcohol abuse does present an issue for their community, but it is largely ignored and unaddressed for religious reasons. Drug abuse is more of an issue among young Haitians. Participants of the Haitian focus group stated that more education is needed about health and prevention to combat the issues listed above. Also, more community education is needed around the needs and services for children with disabilities. Participants noted that stigma and cultural taboos keep parents from seeking help, and language barriers can present challenges to assessing learning delays.

Disparity issues were also brought up by community residents during the volunteer-led focus groups analyzed by the Q-Q Research team. Almost entirely across the board, focus groups voiced major concerns over healthcare inequities, stating that income determines both the access and quality of care one receives. Dental care was identified as an especially costly medical service. The majority of the older population were also concerned with senior medical services. Many identified themselves as “snowbirds” or “transplants” who, if encountered serious medical conditions, would go “up north” for medical care. It is also worth noting that the younger, female Hispanic/Latina residents who participated in the focus group conducted in zip code 34116 shared their personal experience with, systematic racism within the healthcare system. Treatment, access, and quality of care were perceived by residents as poor due to language barriers. “We have encountered many offices that discriminate against us because of the language barrier, which is very frustrating. We may not speak English well, but we can understand how we are being spoken to and how we are being treated.” one woman stated.



SURVEY: COLLIER COUNTY OPINIONS

According to results of the CC-CAS survey, residents residing in 34142 and 34143 (Immokalee) were more likely to agree or strongly agree (66%) that affordable basic medical care for children was available in their community (as compared to 50% in the overall community). In addition, residents in this area were more likely to agree or strongly agree (73%) that affordable basic prenatal was available in their community (as compared to 60% in the overall community). Finally, residents in this community were more likely to be dissatisfied or very dissatisfied with addiction services (51%), as compared to the overall community (32%).

EDUCATION AND SOCIAL SERVICES

FOCUS GROUP REACTIONS

With respect to education and social services, focus group participants from the Immokalee area felt that there are good quality early childhood and after school programs in their community (e.g., Guadalupe, CAN, Boys and Girls). Unfortunately, residents mentioned these programs all have waiting lists, and there is not enough capacity to meet demand. All public schools offer after school programs, but residents stated that children needed a recommendation to get in. Residents stated that many children are cared for in family day care arrangements that may lack quality and are not licensed. Since agricultural work requires non-traditional hours, many residents stated that traditional day-care services with normal hours do not meet their needs; there are no alternate day care choices that work with their schedules. Residents believed that the Middle schools in particular in their area suffer from high teacher turnover rates. As a result, classes are often taught by inadequately trained substitutes because housing cost and shortages keep teachers from moving to Immokalee. Participants agree that there are more adult role models in the community now encouraging children to succeed in school and go to college. Residents discussed the Immokalee Foundation, which is providing scholarships for college. In addition, iTech college offers 18-month vocational degrees. Residents did indicate a need for night classes for adults in Immokalee. Residents noted that while there are these types of classes in Naples, there is a lack of adequate public transportation (i.e., buses) to take potential students to these classes.



During the Haitian focus group, it was noted that many Haitian working parents do not have the time for, and/or do not know how to, advocate for their children in school around behavioral issues. They cited a lack of understanding about educational requirements and testing in this country. As a result, they believe that their children may not be getting the services or attention they need, or, they may be subject to lower educational expectations by their teachers. Residents stated that many young children in the Haitian community do not go to quality child care or Pre-K programs, and as a result, they lack basic skills when they start school. Residents indicated that these educational gaps that are present early on, combined with promotion without qualifications, lead to Haitian youth dropping out of school. Participants believed that children in Title 1 schools get substandard education; they felt that teachers in these schools are not well prepared and there is high turnover. More Haitian teachers and administrators are needed, as well as more after school providers in order to act as role models and connect with the youth of their community. Residents noted that many in the Haitian community turn to churches for programming for children and youth. Participants stated that while adult education programs are available, the ones that exist are of poor quality and classes are mostly offered in English. For residents who would like to attend vocational schools for training, participants remarked that the community alternatives are expensive and time consuming for working Haitians, thus making them out of reach for many.

An additional focus group was conducted with Seminole residents led by community volunteers. The Seminole group educates their children on the reservation and their experience is fairly positive; they like their teaching staff, and they believe they have sufficient vocational options in high school. They do however feel that they are lacking extra-curricular activities that are available to kids and parents off the reservation.

SURVEY: COLLIER COUNTY OPINIONS

According to results of the CC-CAS survey, parents residing in 34142 and 34143 (Immokalee) were more likely to agree or strongly agree that affordable child (58%) care and summer programs (63%) for children were available in their community (as compared to 35% and 52% in the overall community). Parents in Marco Island (zip code 34145) were also more likely to agree or strongly agree that affordable child care (58%) and summer programs (78%) were available. Parents in the following zip codes were less likely to agree or strongly agree (25% or less agreed) that affordable child care for children was available in their community: 34102, 34104, 34105, 34108, 34109, 34110, 34117, 34120. Parents in the following zip codes were less likely to agree or strongly agree (40% or less agreed) that affordable summer programs for children were available in their community: 34103, 34105, 34112, 34117, 34120.

In addition, residents in Copeland, Chokoloskee, Everglades City, Goodland and Immokalee (34137, 34138, 34139, 34140, 34142 and 34143 respectively) were less likely to agree or strongly agree (30%) that services were available for the elderly in their community (as compared to 45% in the overall community).

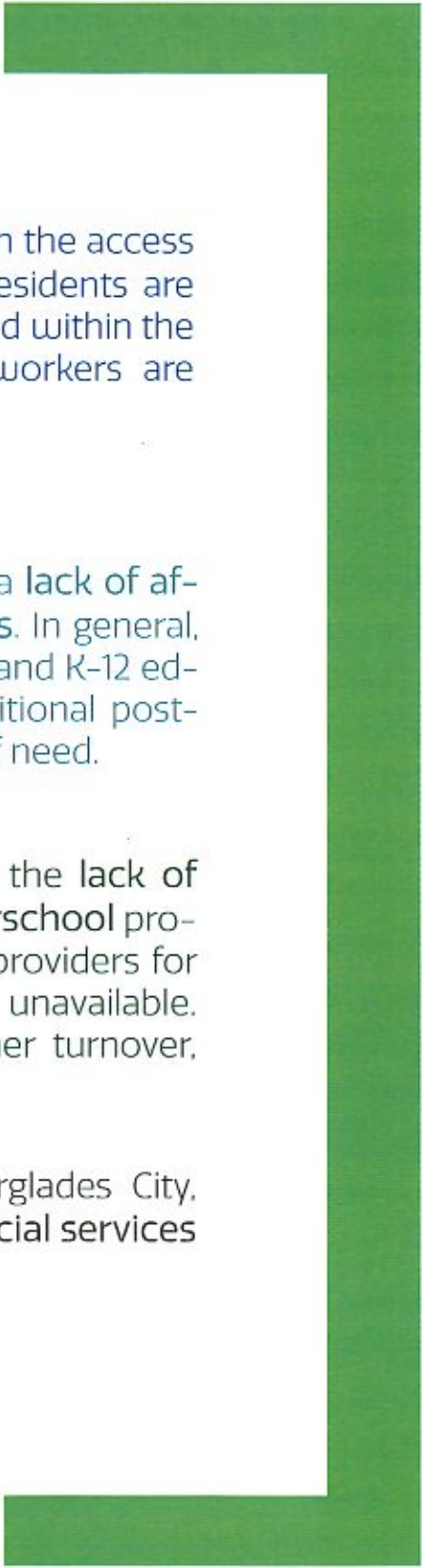
KEY POINTS

With regards to health care services, residents are concerned with **PCP availability** and **wait times** (especially during peak season and for Medicare/Medicaid recipients). There is a lack of PCP providers in the Immokalee area.

While there is a sufficient supply of dental care providers, residents are concerned with the **affordability** of services which limits the use of **dental care services**.

Residents are worried about the **lack of mental health care** and **addiction treatment** availability. Though the number of providers has increased in recent years, gaps in services remain.

A **lack of affordable assisted living, residential options for elderly, and for those with mental health issues and disabilities** continues to be a problem in the area.

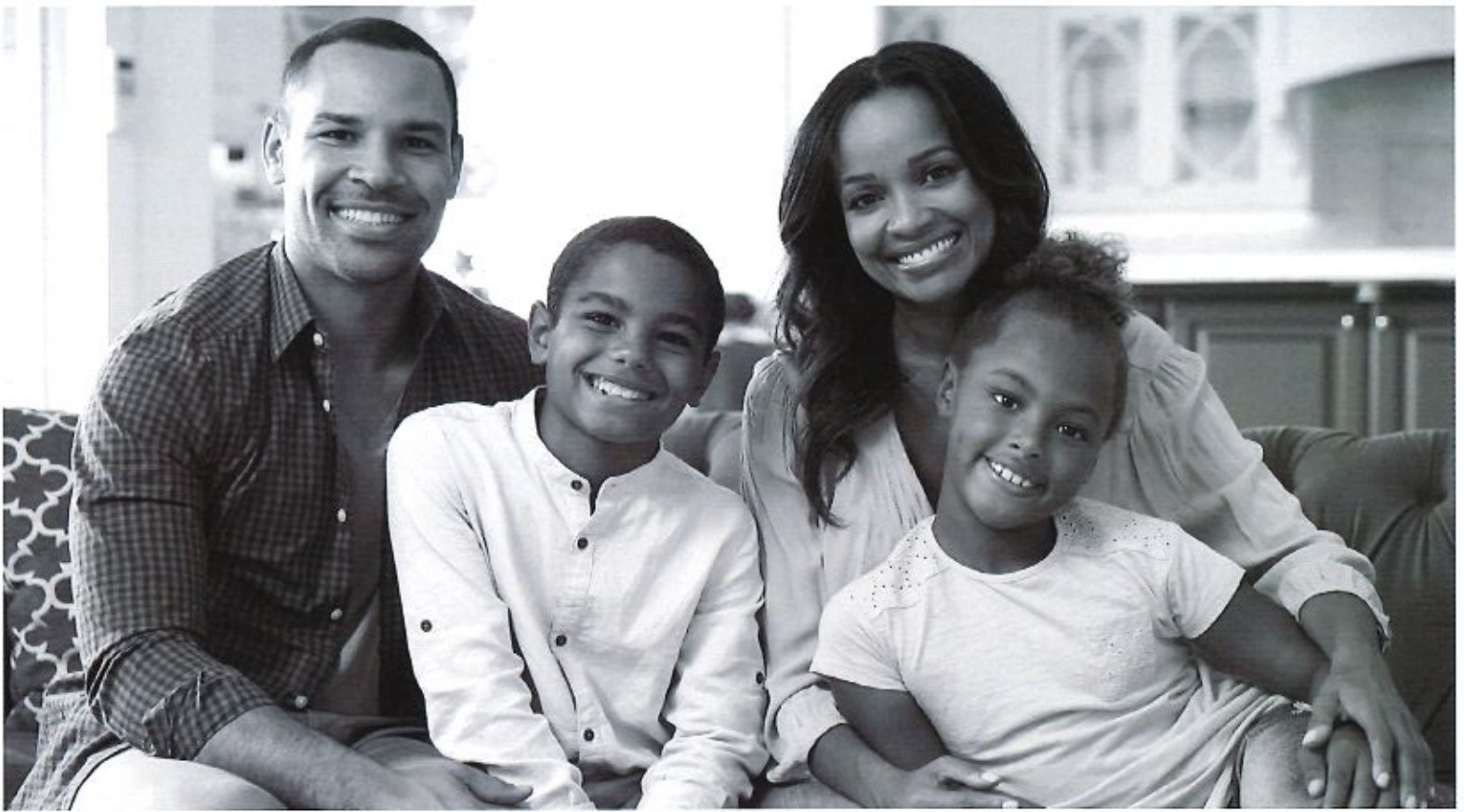


Residents felt that **income determines** both the access and **quality of care** one receives. Some residents are concerned about discrimination experienced within the healthcare system, and undocumented workers are concerned about access to services.

Parents in many areas of the county cited a **lack of affordable child care and preschool options**. In general, parents noted that the available preschool and K-12 education programs are of high quality. Additional post-secondary options were cited as an area of need.

Immokalee residents are concerned with the **lack of capacity** in the **quality preschool and afterschool** programs. Many residents turn to unlicensed providers for this care if spots in quality programs are unavailable. Residents are concerned with high teacher turnover, especially in middle school.

Residents in Copeland, Chokoloskee, Everglades City, Goodland and Immokalee cited a lack of **social services for the elderly**.



SOCIAL ENVIRONMENT AND WELL BEING

INTRODUCTION

A community's social environment has a pronounced and noticeable effect on its residents' wellness. Wellness can be defined in many different ways, and most experts believe the concept to be multi-dimensional, including aspects of both physical health and mental health, along with other characteristics.¹³⁹ Overall, well-being takes into account how a person thinks about and feels about their own life.¹⁴⁰ According to the World Health Organization, mental health can be defined as "a state of well-being in which every individual realizes his or her own potential, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to her or his community".¹⁴¹ Features of a community including safety and community cohesion affect individual health, while the formation of social connections and satisfaction with one's community are associated with well-being.¹⁴²

Along these lines, community engagement can have an effect on the well-being of residents. One measure of resident engagement with a community is how often residents engage in volunteerism. When individuals participate in volunteerism, they demonstrate commitment to their community, helping to create better places to live for all residents. These experiences can create a sense of community cohesion that ultimately helps to create a healthier population.¹⁴³



Overall health of community residents can be influenced by how easily residents can access resources needed to be healthy and happy. For example, improving access to recreation and leisure activities, including parks and green spaces, leads to an increase in physical activity for residents, thereby reducing risks for both physical and mental health conditions (e.g. heart disease, diabetes, depression).¹⁴⁴

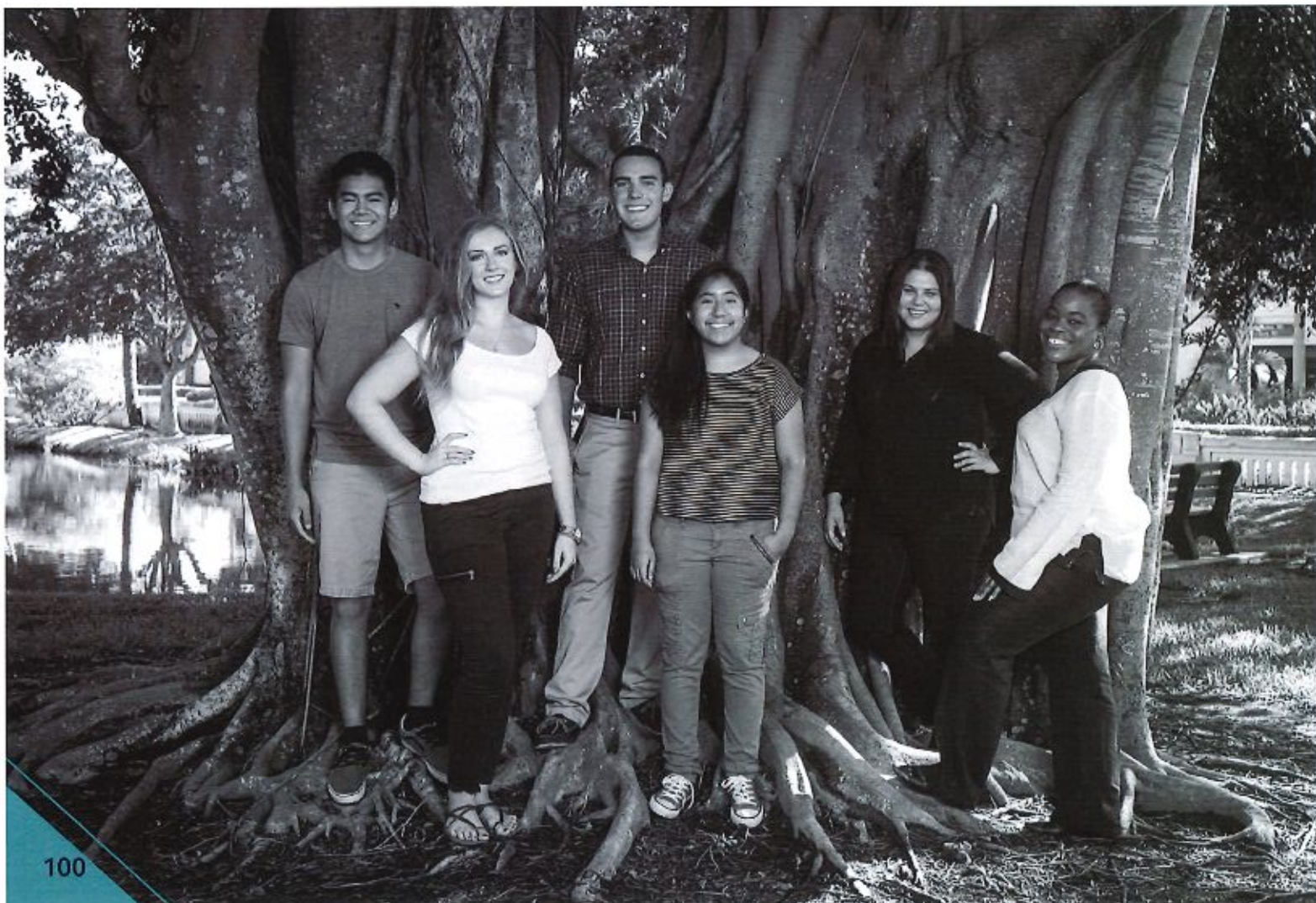
Moreover, health and well-being are directly related to safety. Safe walkable and bikeable pathways can lead to increased physical activity and reduction in chronic illness.¹⁴⁵ High rates of crime and violence in a community have an effect on well-being, as they foster an atmosphere full of stress and anxiety. Increased arousal and chronic stress elicit negative physical responses (e.g. chronic pain, gastrointestinal issues, and high blood pressure). In addition, fear for one's safety creates barriers to engaging in physical activity, such as walking in one's neighborhood.¹⁴⁶ A confluence of factors work to together to create a positive social environment that allows residents to thrive and live happy, healthy, and full lives.

DATA

WELL-BEING AND COMMUNITY COHESION

The Gallup-Healthways Well-Being Index® is a prominent measure of well-being that takes into account a multi-dimensional view of well-being that involves 5 key elements: purpose well-being, social well-being, financial well-being, community well-being and physical well-being.¹⁴⁷ Purpose well-being is defined as “liking what you do each day and being motivated to achieve your goals”; social well-being is defined as “having supportive relationships and love in your life”; financial well-being is defined as “managing your economic life to reduce stress and increase security”; community well-being is defined as “liking where you live, feeling safe and having pride in your community”; and finally physical well-being is defined as “having good health and enough energy to get things done daily.”¹⁴⁸ In the Gallup-Healthways Well-Being analysis, data are gathered through telephone interviews of adults to measure well-being in each of the aforementioned domains to create an overall well-being index which can range from 0 to 100, with higher numbers representing increased well-being.¹⁴⁹

According to their most recent analyses published in 2015, Florida is the 26th ranked state in the nation with regard to well-being with an overall well-being score of 61.9. The overall well-being score for the region of Southwest Florida is higher than that of the state at 68.6, while the score for the Naples area is even higher than that of the region at 71.2. In the Naples area, the community well-being score was highest of the five domains, and higher than scores at both the region and state levels.¹⁵⁰ With respect



to community well-being, in the Naples area, 76% of residents agreed that the city or area they lived in was a perfect place for them, 81% of residents agreed that they were proud of their community (or the area where you live) and 88% of residents indicated that they always feel safe and secure. In addition, 68% of residents interviewed evaluated their lives as “thriving”, while only 2% of those interviewed evaluated their lives as “suffering”. Approximately 85% of residents indicated that they experienced enjoyment or happiness.¹⁵¹

As mentioned in the previous section on Health Care, Southwest Florida is a participant in the Blue Zones Project, “a community-wide well-being improvement initiative” designed to “help make healthy choices easier” for Southwest Florida residents.¹⁵² As a result of these efforts, the well-being index in Southwest Florida has been increasing despite a reverse trend throughout the nation.¹⁵³

81% OF RESIDENTS ARE
PROUD OF THEIR COMMUNITY.

HEALTH AND HEALTH BEHAVIORS

As stated in a previous section on Health Care, in 2016, the Collier County Community Health Assessment (CC-CHA) was completed by the Florida Department of Health in Collier County. The authors conducted a health status analysis and combined the results of this analysis with key information obtained from surveys and focus groups involving residents to identify 5 strategic issues for improvement in the county: chronic diseases, mental health, access to care, obesity and alcohol/drug abuse. Access to care was discussed previously in the Service Environment section of the report. The remaining 4 strategic issues related to physical health and well-being will be discussed here.¹⁵⁴

With respect to chronic disease and mortality, the leading causes of death in the county were identified as follows: cancer, heart disease, Alzheimer’s disease, unintentional injuries, chronic lower respiratory disease, cerebrovascular disease, diabetes mellitus, chronic liver disease and cirrhosis, Parkinson’s disease and suicide, accounting for 77% of all deaths. Diabetes, ranked 7th, continued to pose significant risk and is the cause of death most closely associated with obesity, another strategic issue identified by the CC-CHA.¹⁵⁵

The community has expressed the need for additional mental health services, and data presented in the Service Environment section of this report indicate that the ratio of mental health providers to the population is worse in Collier than it is in the state of Florida and the nation. That being said, Collier County residents reported fewer issues related to poor mental health on average (7%) than the residents in the state (13%). With respect to differences among subgroups, females and residents ages 45 to 64 were more likely to experience mental health issues. In addition, mental health was positively correlated with both income and education, with higher levels of both being related to improved mental health.¹⁵⁶

According to the CC-CHA, two most frequent harmful behaviors and unhealthy habits related are being overweight/obese and tobacco use. Taken together, the two factors account for approximately 35 percent of all preventable deaths in the county. Obesity levels account for 17% of all deaths annually. While Collier County is healthier than the state of Florida with regards to overweight and obesity levels, these conditions account for 17% of all deaths annually in the County, or about 1 out of every 6 deaths. Education level can be considered to be a protective factor against obesity in the county as smaller percentages of adults with advanced degrees are classified as obese (15%) as compared to residents with a high school diploma (28%).¹⁵⁷

Regarding alcohol and drug abuse, the CC-CHA stated that 18% of residents in Collier engaged in heavy drinking in 2013, with males engaging in these behaviors at much higher rates than females. Residents in Collier engage in these behaviors more frequently than residents in the state (17%) and a larger proportion of residents age 65 and over engage in these types of behaviors than in the state. Community residents recognize that this issue is exacerbated by the higher percentage of accidents associated with drinking in the 65 and over population. Substance abuse issues, while improved among adolescents, still plague the community with a negative impact. As previously stated in the Service Environment section, the community recognizes that more affordable long-term substance abuse options are needed.





RECREATION & LEISURE

With regard to recreation and leisure opportunities, Collier County boasts 1,775 acres of park land along with 4,066 of conservation park land. Residents have access to 6 fishing piers, 68 sports fields, 11 recreational centers, 3 gyms, 5 fitness centers and 21 marinas/boat launch areas (among other amenities).¹⁴⁸ Collier County Parks & Recreation (CCPR) provided over 250,000 beach parking permits and volunteers spent over 18,000 hours assisting CCPR with recreational projects. CCPR conducts an annual SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to guide their strategic planning. Among several goals established in their strategic plan, CCPR plans to encourage Collier County residents to actively participate in the planning, programming, and stewardship of Parks and Recreation Resources, and to meet the unmet needs for recreation programs and services in the County through the development and implementation of best practices.¹⁵⁹

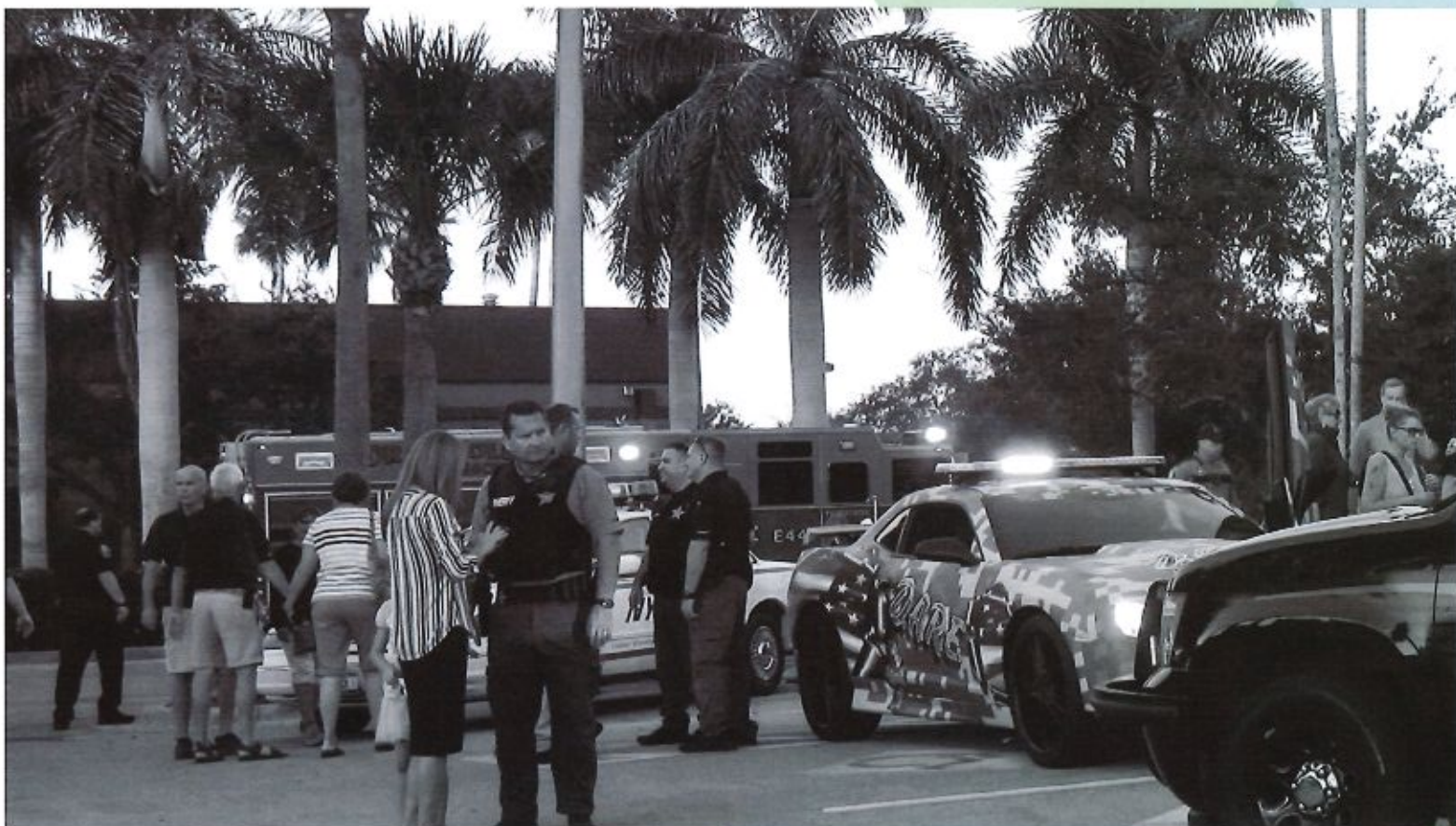
In addition, Collier County is home to Artis-Naples, the principal center for the performing and visual arts in Southwest Florida.¹⁶⁰ Annually, Artis-Naples hosts “more than 800 concerts, performances, exhibitions and educational events for children and adults from all backgrounds each year”. With a commitment to the arts including enrichment and education, Artis-Naples is able to meet the needs of community with the assistance of donors, patrons, and volunteers. With their help, Artis-Naples’ commitment to “enrichment and education provides an inspirational resource for a diverse community”.¹⁶¹

SAFETY

According to the Collier County Sheriff's Office Environmental Scan (CCSO-EA) published in 2017, as of December 2016 there were 1,222 members of the Sheriff's department (46% were law enforcement officers, 21% were correctional officers, and the remaining 33% were civilian members). In addition, the Sheriff's Office reported 103 volunteer members contributing over 32,000 hours to the community in 2016.¹⁶²

With respect to crime rates in Collier County, official statistics show a 5.3% decrease in overall crime from 2015-2016, though the rate of violent crimes increased 11.6 percent, largely due to an increase in aggravated assaults. The majority of reportable crimes fell within the following categories: larceny (61%), burglary (15%) and aggravated assault (14%). Moreover, the number of arrests in Collier County has declined since 2007. The CCSO-EA reports that while arrests leveled off between 2012-2015, they dropped dramatically (by 12%) in 2016.¹⁶³

Finally, the CCSO-EA reported that traffic accidents have been increasing over the past 5 years: accidents have increased by about 50%. The principal concern related to the increase in accidents is the accompanying increase in injuries and fatalities. Both crashes and fatalities have been increasing at higher rates in Collier County and Southwest Florida than in the State of Florida.¹⁶⁴



FOCUS GROUP REACTIONS

Issues related to community cohesion, recreation and leisure, and safety were discussed by community residents during the volunteer-led focus groups analyzed by the Q-Q Research team. While residents in focus groups discussed health care services, they did not engage in much conversation related to health and health behaviors. Related to well-being and community cohesion, residents in the focus groups noted feeling that their community lacked diversity and that they live in a “very homogeneous” community with respect to age, ethnicity, and even religion and politics. Several people reported seeing others using “trigger words” towards people of different ethnicities. Others have remarked on occasion seeing community members being rude to people of other ethnicities who work in the community, and one person went so far as to say that with respect to diversity and acceptance, there is “no civility, especially towards political discourse”. Several diversity gaps were also highlighted during the focus groups’ conversations. Single mothers believed there was not nearly enough diversity within the community, and that non-English speakers or those who were learning, were having a very difficult time integrating into the community. In addition, teachers, police, and first responders noted that the community was also having “troubled relations” with LGBT groups.

When discussing opportunities related to recreation and leisure, many focus group participants agreed that while there were several opportunities for recreation and leisure, many of these opportunities were costly, thus not accessible and affordable to all. Many residents stated that they would like to see



clean and safe public parks where free or inexpensive events could be hosted by the city and local businesses. Residents reiterated the need for better (i.e. safer, more abundant) bike paths, easier beach access, and more benches at the beach and park spaces.

With regard to safety, a majority of the focus groups voiced concern over the safety of pedestrians and bike riders in the community. As stated previously in the Physical Characteristics section of the report, one area of particular concern includes the lack of proper commuter infrastructure (i.e. retrofitting/fixing roads) especially given the recent growth in population. Many cited the need for more lighting at night since populated driving areas are quite dark after the sun goes down. Bicycle riders do not feel safe given the lack of bike paths, drivers do not feel safe about bikers who have to go off the bike path, and pedestrians do not feel safe walking around due to narrow sidewalks and/or lack of sidewalks. Many residents also mentioned texting and driving to be a major issue, voicing that public education was needed.

SURVEY: COLLIER COUNTY OPINIONS

The CC-CAS survey also asked community members in Collier County a series of questions focused on well-being and community cohesion, health and health behaviors, recreation/leisure, and safety. Any differences by zip code are discussed in the Community Differences and Disparities section that follows.

With regard to community cohesion and well-being, respondents were asked a series of questions related to well-being and overall health. When asked if people in their community were accepting of different backgrounds (including ethnicities, races and lifestyles), 70% of residents agreed or strongly agreed, while 20% of residents disagreed or strongly disagreed. It should be noted that opinions of focus group participants and opinions of survey participants differed with respect to this issue. Participants were also asked if residents in their communities participated in faith based activities to create community cohesion. Approximately 71% of residents agreed or strongly agreed, while 9% disagreed or strongly disagreed (18% did not know).

Approximately 67% of respondents agreed that residents in their community are generally healthy. When asked about alcohol use, illegal drug use, and prescription drug abuse, approximately half of respondents indicated that residents struggled with all three types of substances in their communities (Figure 29a, 29b, and 29c). With regard to overall health and well-being, residents were asked if families in their community have access to affordable healthy food. Approximately 52% of residents agreed or strongly agreed with this statement, while 35% disagreed or strongly disagreed (Figure 30).

52%
OF RESIDENTS AGREED
THEY HAVE ACCESS TO
HEALTHY FOODS.

45%

OF RESIDENTS AGREED THAT DRIVING UNDER THE INFLUENCE IS A PROBLEM IN THEIR COMMUNITY.

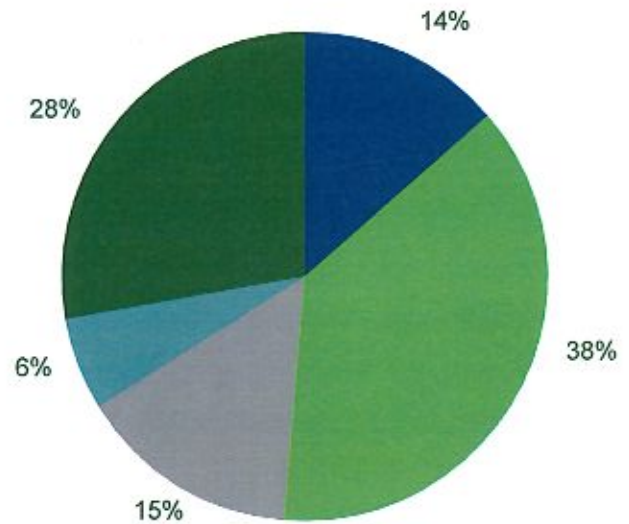


Figure 29a. Residents Struggle with Alcohol Use
Source: CC-CAS, Q-Q Research (2017).

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- Don't Know

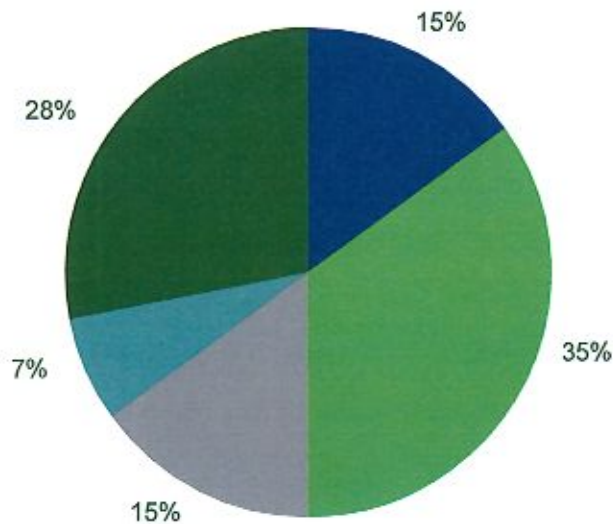


Figure 29b. Residents Struggle with Illegal Drugs
Source: CC-CAS, Q-Q Research (2017).

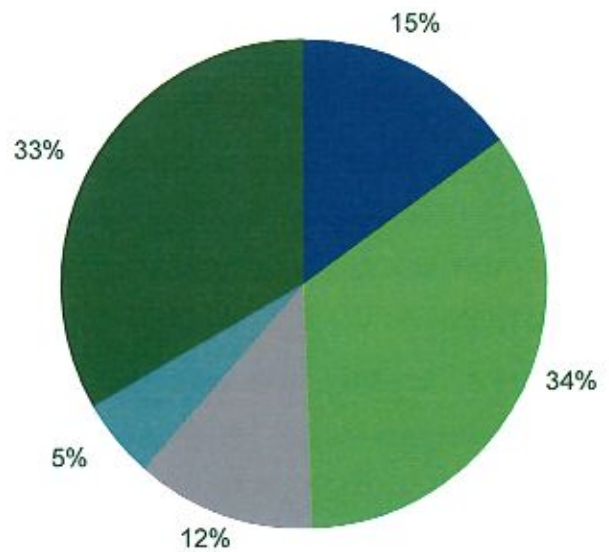


Figure 29c. Residents Struggle with Prescription Drug Abuse
Source: CC-CAS, Q-Q Research (2017).

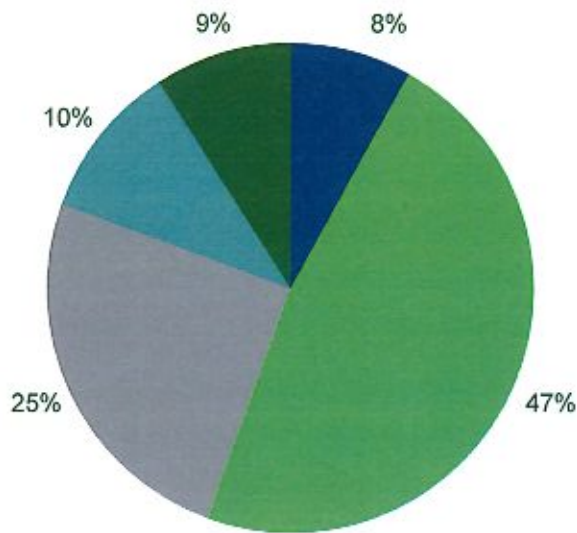


Figure 30. Access to Affordable Healthy Food
Source: CC-CAS, Q-Q Research (2017).

With respect to recreation and leisure, overall residents agreed or strongly agreed that they had adequate access to parks (84%), adequate access to beaches (81%), and adequate availability to arts/cultural programming (76%). Only 52% of respondents agreed or strongly agreed that arts and cultural activities were affordable. Taken together, while residents are aware of the many opportunities for recreation that exist in the community, many residents likely struggle with the affordability and access to these activities. In general, residents responded that they were satisfied or very satisfied with community recreational centers (73%), shopping (80%), sports facilities (72%), and arts facilities (69%).

Residents were also asked a series of questions related to the safety of their community. Overall, 73% of participants indicated that they felt safe driving in their community, while 45% of respondents agreed or strongly agreed that driving under the influence is a problem in their community. A smaller percentage of participants (63%) agreed or strongly agreed that they felt safe biking or walking around their community. A majority of participants (75%) agreed or strongly agreed that they felt safe in their community at night. Over 80% of participants responded that they were satisfied or very satisfied with the safety of their community, and 82% were satisfied or very satisfied with emergency services.

COMMUNITY DIFFERENCES AND DISPARITIES

FOCUS GROUP REACTIONS

A special focus group was conducted with Immokalee residents led by the Q-Q Research team. Among other topics, the topic of safety was discussed. Participating residents felt their community is safe, but recognize that outsiders may not see it this way. Residents believed most working families are welcoming to newcomers; there is no gang or racial violence except for pockets in the southern sector of Immokalee. Group participants felt the Sheriff's department is doing a good job of community policing and partnering with community organizations. Fear of deportation has led to many residents being fearful of interacting with the police, who have been deputized by ICE, although there has not been a spike in actual deportations in the community.

An additional special focus group was conducted with Haitian residents led by the Q-Q Research team, to ascertain their needs and opinion with regards to health and health behaviors, safety, and community cohesion. Stigma associated with mental health difficulties keeps Haitians from seeking help. Participants stated that alcohol abuse is an issue in the Haitian community, but it is largely ignored and unaddressed for religious reasons. For this group, drug abuse is more of an issue among young Haitians. More education is needed about health and prevention.

Most Haitians feel safe in their communities because they know their neighbors, but mistrust of outsiders keeps them from reaching out to other cultural or racial groups. According to participants, younger Haitians are more tolerant of diversity than their elders. There is agreement that the Haitian community needs more spaces for cultural events. This group of residents also agreed that high traffic volume during the peak season is a threat to pedestrians.



SURVEY: COLLIER COUNTY OPINIONS

According to results of the CC-CAS survey, only 36% of residents residing in 34142 and 34143 (Immokalee) agreed or strongly agreed that residents in their community were generally healthy (as compared to 67% in the overall community). Residents in Immokalee were more likely to agree or strongly agree their residents struggled with alcohol use (66%) and illegal drug use (65%). They were also less likely to agree or strongly agree (46%) that their residents had adequate access to affordable, healthy food options.

In addition, the CC-CAS survey revealed that residents residing in 34142 and 34143 (Immokalee) were significantly less likely to agree or strongly agree they had adequate access to parks (64%), adequate access to beaches (35%), and adequate availability of arts/cultural programming (33%). They were also less likely to agree or strongly agree that arts/cultural programming was affordable (33%).

Residents in Immokalee were also less likely to agree or strongly agree (62%) that they felt safe driving in their community (as compared to 73% of overall participants), while 53% of respondents agreed or strongly agreed that driving under the influence is a problem in their community. Residents were also less likely to agree or strongly agree (51%) that they felt safe biking or walking around their community and that they felt safe in their community at night (46%). Only 54% of participants in Immokalee responded that they were satisfied or very satisfied with the safety of their community (as compared to 80% in the overall community), and only 60% were satisfied or very satisfied with emergency services (as compared to 82% overall).

KEY POINTS

In general, residents in Collier believe the residents in the community to be **healthy**, and the region exhibits a higher well-being score than the state. In general, residents who do struggle with their health have issues with **chronic illness, substance abuse, and obesity**. These issues are of greater concern in the Immokalee area.

With respect to safety, residents believe their communities to be **safe**. Residents are concerned with safety of pedestrians and bike riders, lack of lighting at night for drivers, and texting and driving, though **73% of residents felt safe driving**. Again, Immokalee residents are more concerned with safety issues in their community than other residents in Collier County.

Regarding recreation and leisure opportunities, community residents believe they have adequate access to **parks**, adequate access to **beaches**, and adequate availability of arts/cultural programming. Residents expressed concerns related to the **affordability of recreational options**. In general, Immokalee residents are more likely to disagree with statements regarding access to recreational activities.

COMMUNITY IDENTIFIED PRIORITIES

SURVEY: COLLIER COUNTY OPINIONS

In order to identify the domain/issue that community members felt was most important to address, survey participants were asked the following question: “Which of the following do you think should be the top priority for Collier County’s leaders and elected officials to work on during the next two years?” Respondents were able to select from the following options: 1) bringing better paying jobs to the area, 2) environmental preservation, 3) controlling housing costs, 4) managing growth and development, 5) public education, 6) reducing traffic congestion, or 7) all of the above. Respondents also had the option to select “other” and write in a priority not already listed.

A summary of resident responses is included in Table 5 below. Almost half of participants (45%) selected controlling housing costs as a priority for the community, making this the top priority for respondents. The second and third ranked priorities were bringing better paying jobs to the area and managing growth and development; these were chosen as priorities by approximately 39% of residents. The next most popular priorities were traffic congestion, selected by a quarter of participants, and environmental preservation and public education, selected by about 22% of participants.

About 1/5th of the sample (20%) selected all of the above as an option, indicating that they felt all of these issues should be a priority for community leaders. The most common responses by residents who selected “other” were related to improving health care affordability and expanding mental health and substance abuse services. The next most common open-ended responses involved transportation options, namely improving public transportation and increasing the number of safe pathways and sidewalks for residents to bike and walk. Other open-ended responses indicated the need for more affordable extra-curricular activities for both youth and seniors.

Priorities	Responses	
	Estimate	Percent of Residents
Controlling housing costs	1521	45.30%
Bringing better paying jobs to the area	1321	39.30%
Managing growth and development	1300	38.70%
Reducing traffic congestion	847	25.20%
Environmental preservation	750	22.30%
Public education	742	22.10%
All of the above	700	20.80%

Table 6. CC-CAS Survey Responses: Community Identified Priorities
Source: CC-CAS, Q-Q Research (2017).

Finally, the following question was posed to residents who completed the CC-CAS, "In addition to the elections for public office, there may also be a sales tax request on the ballot in Collier County. The purpose would be to provide funding to acquire lands to protect water, wildlife, and public open spaces; purchase safety vehicles and equipment; and construct and repair roads, bridges, traffic signals, parks, drainage, waste water infrastructure, workforce housing, recreational and governmental facilities. What is the likelihood you would support this ballot proposal?" About 23% of residents responded that they would be unlikely or very unlikely to support this request, while 53% of residents responded that they would be likely or very likely to support it. Almost a quarter of the sample (23%) responded that they'd be somewhat likely to support a sales tax increase. Taken together, this result suggests the community moderately supports a sales tax increase to address the above issues.

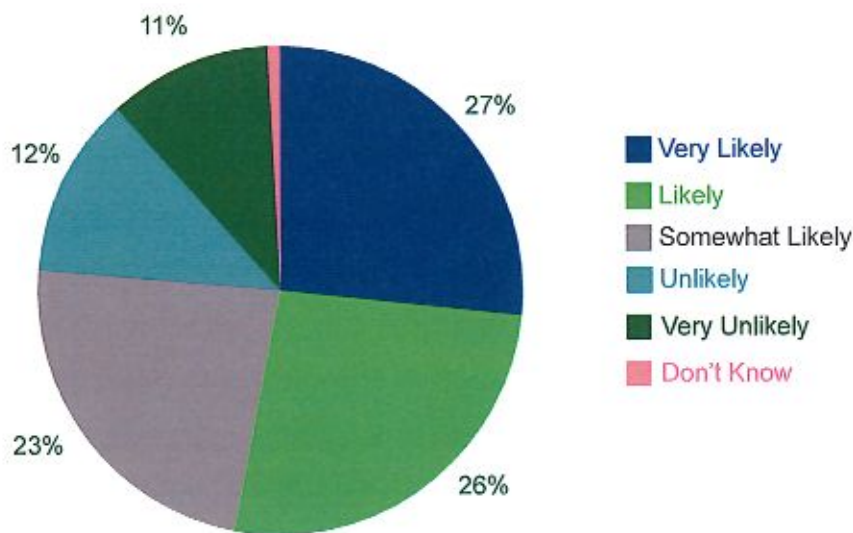


Figure 31. Support for Sales Tax Request

CONCLUDING FOUNDATIONAL ISSUE: ECONOMIC BARRIERS FOR RESIDENTS

Foundational issues are considered to be needs that affect the lives of residents at many levels and across multiple areas. These issues must be addressed to improve the lives of residents in Collier County. Data leading to the identification of the County's primary foundational issue has been presented throughout the report in the Major Findings and Community Identified Priorities sections and in the Appendices.

The primary foundational issue that consistently materialized across domains in this needs assessment was related to the economic barriers many residents in Collier County are facing. An adequate income usually bestows resources that foster a quality life for community residents — such as access to suitable housing, health care, quality schools, secure neighborhoods, and time and money to enjoy recreational activities necessary for well-being. An adequate income also allows an individual the capability to avoid threats to well-being — like air and water pollution and poor quality housing.

Throughout the needs assessment, experts and residents expressed concerns with economic issues related to affordability of basic necessities like housing, health care, child care, and senior care. Creating opportunities for residents to earn a wage that is equal to (or even above) a living wage is key to improving the happiness and quality of life of county residents. This will likely involve developing employment opportunities with salaries that allow residents to meet needs, and enhancing training programs and educational opportunities that align with growth in higher paying occupations.

Collier County has the second highest income inequality in Florida, the top 1% in the area makes 73.2 times more than the bottom 99%.¹⁶⁵ When income and wealth are highly concentrated, there is a tendency towards developing policies that favor those who are prosperous.¹⁶⁶ Throughout the needs assessment, residents and community experts noted that income determined access to housing, health care, child care, and senior care, and it was suggested that policymakers, corporations, and private citizens frequently promoted opportunities that catered to wealthier residents (i.e., prioritization of development of gated communities with expensive homes over affordable mixed-use developments, the provision of concierge medical services over accepting Medicare/Medicaid, an expanding market for child care options and assisted living for wealthy residents coupled with a lack of availability in affordable early childhood programs and assisted living options for seniors). The economic challenge that many American communities, including Collier County, are faced with involves searching for strategies that elevate the means of middle-class and lower income residents, providing them with a sufficient share of the economy, thereby affording them the ability to meet their needs and purchase more of what the local economy produces.¹⁶⁷

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