Money - Slow Rebound
Consumer spending
About 70% of US economy

- Shoppers traditionally lead nation out of recession
- Great Recession Different
  - Consumers lost about $13 trillion in wealth in the housing and stock market swoons.
  - Pre-recession savings rate – 1%
    - May, 2009 - 7.1%
    - July, 2013 - 4.5%
    - July 2014 – 5.3%

Source: Trading Economics, September 2014
Real GDP – 1997-2013


Florida Economy - Florida Economic Strength

- Florida’s National GDP Ranking
  - 18 – 2013
  - 14 – 2012
  - 37 – 2011
  - 40 - 2010
  - 45 - 2009
  - 2 - 2005

- 2013
  - FL GDP grows 2.2%
  - US GDP grows 1.8%

Source: Department of Commerce, Bureau of Economic Analysis, June 2014
Year-Over-Year Growth in FL and US Real GDP


Economy Had Continued Growth in 2013

Meet the Candidates

Florida Economy

3 Building Blocks of Florida’s Economy

- Population Growth
- Construction
- Tourism
Florida Economy

Population

Florida’s April 1 Population

Florida’s population:
- was 15,982,824 in 2000
- was 18,801,332 in 2010
- is forecast to grow to 23,785,174 by 2030

Florida Population: #3 … Almost

December 2013 Census Estimates:

- #4 - Florida – 19,552,860 (+750,000 more than in the 2010)
- #3 - New York – 19,651,127
  - Difference - 98,267

Projection: Florida #3 in 2014 behind California and Texas.

Florida’s Population Growth

Florida Economy - Population

FLORIDA POPULATION GROWTH

Source: Bureau of Economic & Business Research, UF, May 11, 2012

Florida Economy - Population

FLORIDA POPULATION INCREASE BY PERCENTAGE

Source: Bureau of Economic & Business Research, UF, June 2011
**Florida Residents: Place of Birth**

![Pie chart showing the place of birth for Florida residents.]

Source: State of Florida, Long-Range Financial Outlook, Fiscal Years 2015-16 through 2017-18, Fall 2014 Report

---

**Population Growth by Age Group**

- Between 2010 and 2030, Florida’s population is forecast to grow by almost 5 million persons.
- Florida’s older population (age 60 and older) will account for most of Florida’s population growth, representing 55.5 percent of the gains.
- Florida’s younger population (age 0-17) will account for 14.2 percent of the gains.

Median Age

- Four of the nation’s top ten places with the highest percentage of population age 65 and over were in Florida:
  - Clearwater (19.8%)
  - Hialeah (19.1%)
  - Cape Coral (17.0%)
  - Miami (16.0%)


Median Age of Floridians (April 1, 2012)

- The median age of Florida residents was estimated to be 41 years as of April 1, 2012.
- There was 1 county with a median age below 30: Leon (29.9).
- There were 6 counties with a median age of 50 and older: Sumter (62.9), Charlotte (66.1), Citrus (54.5), Sarasota (53.1), Highlands (52.2), and Martin (50.6).

Florida Economy

Construction

The Things They Say

Crist: Scott a “corporate governor” who is “crushing the middle class”.
Existing Homes Sales Are Increasing

![Bar chart showing calendar year sales as a share of 2005 peak year]

NOTE: 2014 percentage is projected based on six months of data.


Existing Home Price Gains Have Flattened (Data through June 2014)

![Line chart showing median sales price of existing homes]

Documentary Stamp Collections

Total Documentary Stamp Tax Collections (FY Beginning)


Homeownership Rate Below Normal

Florida Homeownership Rate through 2013

Florida Housing is Generally Improving


Florida Foreclosures Ahead

20% of all residential loans in Florida are for homes that are underwater.

Almost 50%...
- 2006 - Mortgages were considered “innovative” (interest only and adjustable-rate).
- 2011 - residential loans in Florida are for homes “underwater”.

Source: Office of Economic & Demographic Research, December 2014
Florida Foreclosures

First Six Months of 2014...
- Highest State for # of Filings
- Highest State for Foreclosure Rate
- Among US Metro Area rates, 9 of the top 10 highest metro rates in the nation were in Florida.
  
  Miami-Fort Lauderdale-Pompano Beach #1
  Orlando-Kissimmee #2
  Port St. Lucie #3
  Palm Bay-Melbourne-Titusville #4
  Tampa-St. Petersburg-Clearwater #5
  Lakeland #6
  Deltona-Daytona Beach-Ormond Beach #7
  Ocala #8
  Jacksonville #9

Days to Foreclose

Days to Foreclose

Average Days to Foreclose

- California
- Florida
- New Jersey
- New York
- Texas


Florida Foreclosures

Florida Economy

Tourism

Tourism Rocks

Tourists Visiting Florida:

- 2013 – 94 million
- 2014 1\textsuperscript{st} & 2\textsuperscript{nd} Qs – 50 million
- 2014 Scott Goal – 100 million

Source: Visit Florida, September 2014.
Tourism Rocks!

Total Tourism Spending (billions) 2003-2013

Source: Visit Florida, September 2014.

Tourism Rocks!

Total State Sales Tax Revenues from Tourism 2003-2013 (in billions)

Source: Visit Florida, September 2014.
Tourism Rocks!

Number of Persons Directly Employed by Tourism Industry 2003-2013 (In billions)

Source: Visit Florida, September 2014.

Florida Economy

Jobs!
Current Employment Conditions

June Unemployment Rate
US 6.2%
FL 6.2% (597,000 people)

Highest Monthly Rate
11.4% (December 2009 through March 2010)

Lowest Monthly Rate
3.3% (January through August 2006)


Employment Still Down from Peak Levels, But Improving...

US and FL Unemployment Rates

United States and Florida Unemployment Rates (seasonally adjusted)


2014 Elections

He Says....She He Says

Scott: It’s the Economy, Stupid

- Unemployment: 9.4% → 7.1%
2014 Elections

He Says….She He Says

Democrats: Yes, but.

- Unemployment Rate
  - 47% of Decline = people dropping out of the labor pool or delaying entry.
  - Real Rate = 8.2%

Florida Adds Jobs

June 2013 - June 3014

- Texas – 396,200
- California – 323,600
- Florida – 208,500
- New York – 114,800
- North Carolina – 89,000

Fastest Growing States

Florida Tech Jobs Explode

Tech Jobs Created in Florida

- 2013: 4,500
- Jan. - June 2014: 4,100

Source: Dice, August 2014
Florida Job Growth

<table>
<thead>
<tr>
<th>Industry Title</th>
<th>July 2013</th>
<th>July 2014</th>
<th>July 2013 to July 2014 Level</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>369,900</td>
<td>410,200</td>
<td>40,300</td>
<td>10.9%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>994,500</td>
<td>1,027,900</td>
<td>33,400</td>
<td>3.4%</td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>536,700</td>
<td>555,000</td>
<td>19,300</td>
<td>3.6%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>979,400</td>
<td>1,000,300</td>
<td>20,900</td>
<td>2.1%</td>
</tr>
<tr>
<td>Leisure and Hospitality</td>
<td>1,033,500</td>
<td>1,075,700</td>
<td>42,200</td>
<td>4.1%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>836,900</td>
<td>869,800</td>
<td>32,900</td>
<td>3.9%</td>
</tr>
<tr>
<td>Other: Personal and Laundry Services</td>
<td>87,700</td>
<td>90,900</td>
<td>3,200</td>
<td>3.7%</td>
</tr>
<tr>
<td>Total</td>
<td>4,001,700</td>
<td>4,160,900</td>
<td>159,200</td>
<td>4.0%</td>
</tr>
<tr>
<td>Total Nonagricultural Employment</td>
<td>7,456,400</td>
<td>7,674,400</td>
<td>218,000</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

Industry Percentage of Job Total

Source: Florida Department of Economic Opportunity

Wage Gap Stabilizes in 2013

Families walking the financial tightrope, unable to afford life’s basic necessities, one emergency from falling into poverty.

Who Is ALICE?

- 45% of Florida households
  - child & elder care workers
  - mechanics,
  - home health aides
  - store clerks
  - office assistants,
  - etc, etc, etc

…one health emergency, one car repair, one harsh storm away from poverty.
Florida Budget Snapshots 2014-2015

- $77 B budget
  - 20.5 M people … $3,800 each
  - Each Day … $210 M
  - Each Hour … $8.8 M
- Education
  - 29% … 22.6 B … $43,000 minute
- Human Services
  - 41% … $31.9 B … $60,700 minute
### Appropriations By Fund Source for Fiscal Year 2014-2015 (Dollars in Millions)

**Appropriations by Fund Source**

<table>
<thead>
<tr>
<th>Program Area (Section of General Appropriations Act)</th>
<th>General Revenue</th>
<th>Education Enhancement Trust Fund</th>
<th>Tobacco Settlement Trust Fund</th>
<th>Other State Trust Funds</th>
<th>Federal Trust Funds</th>
<th>All Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>14,468.2</td>
<td>1,744.6</td>
<td></td>
<td>3,611.0</td>
<td>2,664.9</td>
<td>22,597.5</td>
</tr>
<tr>
<td>Human Services</td>
<td>9,270.6</td>
<td>-</td>
<td>373.6</td>
<td>5,275.0</td>
<td>17,956.8</td>
<td>31,878.6</td>
</tr>
<tr>
<td>Judicial Branch</td>
<td>385.0</td>
<td>-</td>
<td>-</td>
<td>102.6</td>
<td>2.8</td>
<td>601.8</td>
</tr>
<tr>
<td>Criminal Justice and Corrections</td>
<td>3,480.5</td>
<td>-</td>
<td>-</td>
<td>438.8</td>
<td>235.8</td>
<td>4,156.1</td>
</tr>
<tr>
<td>Natural Resources/ Environment/ Growth Management/ Transportation</td>
<td>510.0</td>
<td>-</td>
<td>-</td>
<td>8,003.7</td>
<td>4,401.0</td>
<td>13,778.8</td>
</tr>
<tr>
<td>General Government</td>
<td>700.7</td>
<td>-</td>
<td>-</td>
<td>2,362.6</td>
<td>1,217.4</td>
<td>4,370.7</td>
</tr>
<tr>
<td>Total</td>
<td>27,913.8</td>
<td>1,744.5</td>
<td>373.6</td>
<td>20,651.7</td>
<td>28,388.2</td>
<td>77,872.2</td>
</tr>
</tbody>
</table>

Source: The Florida Legislature Fiscal Analysis in Brief, 2014 Legislative Session.
Projected FY 2014-15 Recurring General Revenue Sources (Dollars in Millions)

Source: The Florida Legislature Fiscal Analysis in Brief, 2014 Legislative Session.
Appropriations By Program Area for Fiscal Year 2014-2015 (Dollars in Millions)

<table>
<thead>
<tr>
<th>Program Area (Section of General Appropriations Act)</th>
<th>Dollars</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>22,587.5</td>
<td>29.3%</td>
</tr>
<tr>
<td>Human Services</td>
<td>31,878.8</td>
<td>41.4%</td>
</tr>
<tr>
<td>Judicial Branch</td>
<td>501.6</td>
<td>0.7%</td>
</tr>
<tr>
<td>Criminal Justice and Corrections</td>
<td>4,155.1</td>
<td>5.4%</td>
</tr>
<tr>
<td>Natural Resources/Environment/Growth Management/Transportation</td>
<td>13,578.6</td>
<td>17.6%</td>
</tr>
<tr>
<td>General Government</td>
<td>4,370.7</td>
<td>5.7%</td>
</tr>
<tr>
<td>Total</td>
<td>77,072.2</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: The Florida Legislature Fiscal Analysis in Brief, 2014
GR Appropriations By Program Area for Fiscal Year 2014-2015 (Dollars in Millions)

Source: The Florida Legislature Fiscal Analysis in Brief, 2014
### Appropriations History
(Dollars in Millions)

Source: The Florida Legislature Fiscal Analysis in Brief, 2014

### Florida Budget - GR Estimate

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Forecast</th>
<th>Incremental Growth</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-06</td>
<td>27,074.8</td>
<td></td>
<td>8.4%</td>
</tr>
<tr>
<td>2006-07</td>
<td>26,404.1</td>
<td></td>
<td>-2.5%</td>
</tr>
<tr>
<td>2007-08</td>
<td>24,112.1</td>
<td></td>
<td>-8.7%</td>
</tr>
<tr>
<td>2008-09</td>
<td>21,025.6</td>
<td></td>
<td>-12.8%</td>
</tr>
<tr>
<td>2009-10</td>
<td>21,523.1</td>
<td></td>
<td>2.4%</td>
</tr>
<tr>
<td>2010-11</td>
<td>22,551.6</td>
<td></td>
<td>4.8%</td>
</tr>
<tr>
<td>2011-12</td>
<td>23,618.8</td>
<td></td>
<td>4.7%</td>
</tr>
<tr>
<td>2012-13</td>
<td>25,314.6</td>
<td></td>
<td>7.2%</td>
</tr>
<tr>
<td>2013-14</td>
<td>26,198.0</td>
<td></td>
<td>3.5%</td>
</tr>
<tr>
<td>2014-15</td>
<td>27,189.4</td>
<td>991.4</td>
<td>3.8%</td>
</tr>
<tr>
<td>2015-16</td>
<td>28,246.6</td>
<td>1,057.2</td>
<td>3.9%</td>
</tr>
<tr>
<td>2016-17</td>
<td>29,655.0</td>
<td>1,408.4</td>
<td>5.0%</td>
</tr>
<tr>
<td>2017-18</td>
<td>31,041.6</td>
<td>1,386.6</td>
<td>4.7%</td>
</tr>
<tr>
<td>2018-19</td>
<td>32,118.9</td>
<td>1,077.3</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

Source: Office of Econ. & Demographic Research, August 2014
### Compounding Effect of Year 1 Expenditure of Ending Balance

<table>
<thead>
<tr>
<th>Year</th>
<th>Outlook Ending Balance</th>
<th>Ending Balance if Year 1 Balance Spent on Recurring Issues</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-16</td>
<td>336.2</td>
<td>0</td>
<td>-336.2</td>
</tr>
<tr>
<td>2016-17</td>
<td>1,004.5</td>
<td>332.1</td>
<td>-672.4</td>
</tr>
<tr>
<td>2017-18</td>
<td>2,156.1</td>
<td>1,147.5</td>
<td>-1,008.6</td>
</tr>
</tbody>
</table>

Source: State of Florida, Long-Range Financial Outlook, Fiscal Years 2015-16 through 2017-18, Fall 2014

### Direct Debt Outstanding by Program

![Direct Debt Outstanding by Program](image)

Source: State of Florida, Long-Range Financial Outlook, Fiscal Years 2015-16 through 2017-18, Fall 2014
Historical Total Direct Debt Outstanding

Annual projected debt service – about $2 B.

Source: State of Florida, Long-Range Financial Outlook, Fiscal Years 2015-16 through 2017-18, Fall 2014

Projected Annual Debt Service Next Ten Years

Source: State of Florida, Long-Range Financial Outlook, Fiscal Years 2015-16 through 2017-18, Fall 2014 Report
2015 Florida Legislature

2015 Florida Legislature

2015 Session Dates

March 3 - May 1
2014 Florida Legislature

Republicans Rule:

- House: 75Rs – 44Ds
- Senate: 26Rs – 14Ds

Legislative Leadership
2014 Elections

He Says….She He Says

- Scott at Americans for Prosperity
  - Crist backed stimulus
  - Crist hugged Obama

2015 Legislative Session - Leadership

<table>
<thead>
<tr>
<th>YEAR</th>
<th>HOUSE</th>
<th>SENATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-14</td>
<td>Weatherford</td>
<td>Gaetz</td>
</tr>
<tr>
<td>2015-16</td>
<td>Crisafulli</td>
<td>Gardiner</td>
</tr>
<tr>
<td>2017-18</td>
<td>Corcoran</td>
<td>Negron/Latvala</td>
</tr>
<tr>
<td>2019-20</td>
<td>Eisnaugle</td>
<td>???</td>
</tr>
</tbody>
</table>
2015 Florida Legislature

Organization Session
November 18, 2014

2015 Florida Legislature

No Legislature But…
Wansley Walters
2014 Elections

OFFICIAL 2014 HURRICANE SEASON CARTOON FORECAST
100% Accuracy Guaranteed!

HURRICANE RICK: WILL BLOW HARD FROM THE RIGHT
HURRICANE CHARLIE: ????

United Way of Florida
2014 Elections

Which Seats are up?

- Governor
- 20 Senate (even numbered districts)
- 120 House
- Cabinet
- Members of Congress (not Senators)

Dissatisfaction with Major Parties

The new campaign challenge...The color purple.

Since 2010 in Florida:

- 546,985 New Registered Voters
  - 78% registered other than Rs &Ds
  - +17% - No Party Affiliation
  - +2% - Republicans
  - +0.3% - Democrats

Source: Florida Department of State, Division of Elections, June 2014.
### Historical Dislike

<table>
<thead>
<tr>
<th></th>
<th>Favorable</th>
<th>Unfavorable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott</td>
<td>40</td>
<td>45</td>
</tr>
<tr>
<td>Crist</td>
<td>40</td>
<td>42</td>
</tr>
</tbody>
</table>

Florida Governor’s Race: A vote against the other guy.

Source: Quinnipiac University, July 2014.

### Shifting Polls

**Dead Heat**

**Scott Creeping Up**

- Alone:
  - Scott – 47
  - Crist – 41
- With Wylie:
  - Scott – 44
  - Crist – 41
  - Wylie – 3

Source: Associated Industries of Florida; Tribune/Scripps Capital Bureau; September 9, 2014.
2014 Elections - Money
Campaign $$$ Raised and Spent

Crist
- $24.7 M raised
- $13.4 M spent
- $11.3 M cash

Scott
- $45.5M raised
- $28.7M spent
- $16.8 M cash
- Personal???

Running Mates

Scott & Carlos Lopez-Cantera
Crist & ????
Running Mates

Crist Running Mate: Annette Taddeo-Goldstein

- 47
- Colombian-American businesswoman
- Party insider
- Married mother of one
- Small business owner (LanguageSpeak; translation services)

Crist: “She’s a remarkable woman and a classic American success story. She truly is an American dream come true.”
2015-16 Budget - Campaign Promises

Scott: Cut $1B in taxes over next 2 years.

Crist:
- Restore education funding to pre-recession levels.
- Target discrimination against gay and transgender employees.
- Force state-hired contractors to pay employees at least $10.10 an hour.

2014 Elections

He Says….She He Says

Website Wars:
- D’s
  - www.realrickscott.com
- R’s
  - www.emptychaircharlie.com (Old D site)
  - http://cristorylessons.tumblr.com/
Crist vs. Scott: 3 Debates

October

- 10 – Telemundo
- 15 – Leadership Florida
- 21 – CNN

Scott – “Candidates who refuse to debate show a disdain for the voters.”

Crist – “Rick Scott limiting debates to three is a disservice to voters, but not surprising considering his history of refusing to answer questions to avoid going to jail.”

2014 Elections

Governor’s Race

"The survivor will be the candidate voters dislike least on election day.“

**Timing** is Everything - Crist vs. Rubio, 2010
Constitutional Amendments on 2014 Ballot

- Water and Land Conservation
- Use of Marijuana for Certain Medical Conditions
- Prospective Appointment of Certain Judicial Vacancies

The Supremes

- 7 Justices
- 70 – Mandatory Retirement Age
- 4 – 70 by January 2019
- Unconstitutional
  - Drug Test Welfare Recipients & State Employees
  - Prison Privatization
  - Protecting Developers from Lawsuits
  - School Vouchers
  - Med Mal Caps
Florida’s Political Soap Opera

3/10 Crist Campaign Ad —“The backroom deals, the secret promises, Washington liberals forcing government takeover of health care. Obama, Reid, Pelosi. It’s a three-ring circus.”

2014 Elections

2015 Issues
2014: Fewest Bills Passed in More than a Decade

22% less than the 10-year average of 338 bills passed per year for 2004-2013.

2015 Issues

Budget!...

It’s all about the Money!

Governor’s proposed budget due end of January, 2015.
2015 Issues

- Health Care
- Gaming
- Common Core Standards and PARCC
- Medical marijuana
- Guns in Disaster Shelters
- Pensions

2015 Issues – Preliminary 2015 Florida United Way Consensus Legislative Agenda

Education

Access to high quality early learning programs for all children.

- Afterschool Programs
- Teacher Education and Compensation Helps
- Early Steps
- Mentoring
- Middle School Early Warning Systems
2015 Issues – Preliminary 2015 Florida United Way Consensus Legislative Agenda

Income
Expand the Volunteer Income Tax Assistance (VITA) Program.
- Homelessness
- Sadowski/Affordable Housing
- Predatory Lending
- Financial Literacy

Health
Access to healthcare for all Floridians.
- Home and Community-Based Care for the Elderly
- Healthy Families Florida
- Healthy Start
- Veterans
- Behavioral Health
- Mental Health
- Food Deserts
2015 Issues – Preliminary 2015 Florida United Way Consensus Legislative Agenda

Safety Net

- Guardian ad Litem
- Background Screening

Effectiveness of Advocacy Strategies

<table>
<thead>
<tr>
<th>Advocacy Strategy</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person visits</td>
<td>81.1%</td>
</tr>
<tr>
<td>Individualized postal letters</td>
<td>59.1%</td>
</tr>
<tr>
<td>Individualized email letters</td>
<td>50.0%</td>
</tr>
<tr>
<td>Telephone calls</td>
<td>39.5%</td>
</tr>
<tr>
<td>Representative contact</td>
<td>38.6%</td>
</tr>
<tr>
<td>Phone comments</td>
<td>37.2%</td>
</tr>
<tr>
<td>Visit from a lobbyist</td>
<td>27.3%</td>
</tr>
<tr>
<td>News endorsement</td>
<td>20.5%</td>
</tr>
<tr>
<td>Individualized faxes</td>
<td>18.2%</td>
</tr>
<tr>
<td>Comments on social media sites</td>
<td>15.9%</td>
</tr>
<tr>
<td>Form postal letters</td>
<td>8.1%</td>
</tr>
<tr>
<td>Postcards</td>
<td>7.8%</td>
</tr>
<tr>
<td>Form email</td>
<td>4.5%</td>
</tr>
<tr>
<td>Form faxes</td>
<td>2.3%</td>
</tr>
</tbody>
</table>

Source: Kevin Cate Communications, Legislative Staff Survey, May 2012
Where Lawmakers Gauge Public Opinion

**Very Effective**

<table>
<thead>
<tr>
<th>Method</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attending events</td>
<td>89.2%</td>
</tr>
<tr>
<td>Printed mags. (small, postal, fax, phone)</td>
<td>78.8%</td>
</tr>
<tr>
<td>Town hall meetings</td>
<td>76.3%</td>
</tr>
<tr>
<td>District/state office</td>
<td>73.7%</td>
</tr>
<tr>
<td>Member/Senator’s blog</td>
<td>36.8%</td>
</tr>
<tr>
<td>Paper survey/polls</td>
<td>33.3%</td>
</tr>
<tr>
<td>Facebook</td>
<td>28.9%</td>
</tr>
<tr>
<td>Twitter</td>
<td>13.2%</td>
</tr>
<tr>
<td>Telephone</td>
<td>10.8%</td>
</tr>
<tr>
<td>Online town hall meetings</td>
<td>10.8%</td>
</tr>
<tr>
<td>Online survey/polls</td>
<td>7.9%</td>
</tr>
<tr>
<td>YouTube</td>
<td>2.6%</td>
</tr>
<tr>
<td>Identical form communication</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Source: Kevin Cate Communications, Legislative Staff Survey, May 2012

Most Convincing Messages

**79.1%**

**VERY EFFECTIVE**

**Personal Story**

**76.7%**

**VERY EFFECTIVE**

**Local Impact**

*MOST EFFECTIVE*

Source: Kevin Cate Communications, Legislative Staff Survey, May 2012
2014 Legislative Landscape

Thanks!