



Florida
TaxWatch



A Year of
Lasting Victories
for Taxpayers

2021
ANNUAL
REPORT

About Florida TaxWatch

There is only one organization in Florida that is recognized as the eyes and ears of the Florida taxpayers. Florida TaxWatch, now in its 43rd year, is the only nonpartisan, independent think tank that produces relevant and timely research designed to protect Florida taxpayers. Our work puts a spotlight on spending slipped into the state budget with no public debate, recognizes and rewards both state employees and educational leaders for excellence, promotes efficiencies that improve the lives of all Floridians, and keeps policymakers from reaching too far.

It is the mission of Florida TaxWatch to provide the taxpayers of Florida and public officials with high quality, independent research and analysis of issues related to state and local government taxation, regulations, expenditures, policies, and programs. Our research recommends productivity enhancements and explains the statewide impact of fiscal and economic policies on the state's residents and businesses. We are the trusted eyes and ears of Florida's taxpayers.

Florida TaxWatch is able to fulfill our mission thanks to voluntary, tax-deductible, private gifts, grants, and contributions and does not accept direct government funding. These contributions provide a solid, lasting foundation that has enabled Florida TaxWatch to bring about a more effective, responsive government that is more accountable to, and productive for, the residents it serves since 1979.

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Maintaining a Strong, Stable Footing

CHAIRMAN'S MESSAGE

I believe that the primary role of the Chairman of a nonprofit organization is to ensure the long-term stability of that organization, through prudent fiscal guidance and steady leadership. It is no stretch to say that the past Chairmen of Florida TaxWatch have done a phenomenal job.

One year into my tenure as Chairman, Florida TaxWatch is in perhaps its best financial situation in decades. The engagement and contributions of our supporters and Trustees has enabled us to emerge from the pandemic and its economic challenges in a strong position, ready and able to help Florida do the same.

When many organizations are reeling and struggling to recoup their losses, Florida TaxWatch is moving full steam ahead.

Your involvement enables the staff and leadership of Florida TaxWatch to pursue the right areas of research, to stay one step ahead of both the next major challenge and those that lie beneath the surface for Florida, and to preemptively offer policymakers recommendations that help inform the discussions in Tallahassee and throughout the state each year.

I thank you for your continued dedication to the work of Florida TaxWatch and encourage you to bring your colleagues to the table to continue the great momentum that we have generated in the past few years.

Respectfully,



**U.S. SENATOR
GEORGE S. LEMIEUX**

Chairman of the Board of Trustees (2020-2022)



Vigilance and Tenacity Pay Off

PRESIDENT'S MESSAGE

I am both deeply honored and proud of the work that Florida TaxWatch has done over its 42 years, and looking back helps us to see how our work develops and grows in influence over time.

Through changes in Governors, Cabinet and agency structure, and the explosion of web-based access to the Capitol process, Florida TaxWatch has maintained a steady and growing influential presence. That presence has meant that when a crisis arises—like a global pandemic—the Legislature, Governor, and taxpayers throughout Florida know that they have a reliable partner to which they can turn to for guidance.

This past year was a shining example of that continuity and influence. Successful passage of long-term TaxWatch priorities like enacting E-fairness, reducing the business rent tax, corporate income tax reduction, and the solvency of the unemployment compensation trust fund were bundled together and signed by the Governor.

Several recommendations of the TaxWatch COVID-19 Taxpayer Task Force were implemented and our thorough assessment of last year's M-CORES projects helped the 2021 Legislature pass a bill to rescind that project.

At the end of the day, it is the unrelenting pursuit of excellent public policies at Florida TaxWatch that I am perhaps most proud of. This year showed that when TaxWatch stakes its position, those in power take notice; when TaxWatch suggests a path, they are more likely to take it; and when hard-working Floridians are in need of sensible, responsible reforms to get their state back on its feet, they can turn to our unique organization—time and time again.

Respectfully,

Dominic M. Calabro
DOMINIC M. CALABRO
President & CEO

Research Snapshot

The story of Florida TaxWatch in 2021 was one of taxpayer victories and a hand in the recovery of one of the world's (14th if Florida were a country) biggest economies.

Coming out of the COVID-19 pandemic's most intense period, it was necessary for the Governor and state Legislature to make decisions that would jump-start economic activity, reinforce the basic foundations of Florida's tax base, and provide the tools that would allow businesses to open back up in a safe and responsible way.

Each step of the way, Florida TaxWatch was at the forefront of that effort. The **TaxWatch COVID-19 Taxpayer Task Force** recommendations became the blueprint for a legislative session that saw a number of long-term TaxWatch issues handled in one bill: E-Fairness, substantially reducing the Business Rent Tax, and unemployment compensation fund restoration.

For more than two decades, Florida TaxWatch research has consistently called for the state to collect the legally-owed **sales tax from out-of-state sellers online**, a revenue deficit that would exceed \$1 billion in just the first year alone. When the Legislature needed a sensible solution to refill the unemployment compensation trust fund, the door was kicked open to implementing this necessary reform. TaxWatch research had reassured policymakers that the change was necessary and responsible, showing that our tenacity was worthwhile.

Throughout 2020 and 2021, a near-constant question was on the minds of everyone involved in Florida's political sphere: what will the state of the budget be for 2021? Fortunately for taxpayers, Florida TaxWatch was there to keep them informed. A near-monthly tradition for years, the **Florida TaxWatch Budget Watch** publication proved to be the guidance many needed to keep up with



ROWDY GAINES (OLYMPIC LEGEND AND VOICE OF SWIMMING FOR NBC) JOINED TAXWATCH TO THANK THE TEAM FOR THE "EVERY CHILD A SWIMMER" REPORT & OUTREACH

an ever-changing revenue landscape, as well as where federal dollars were likely to end up.

A significant amount of Florida TaxWatch research in 2021 focused on the every day lives of Floridians through recommendations that might not seem, at first, to be in the TaxWatch portfolio. A briefing on **Red Tide Mitigation** focused not on agricultural runoff or freshwater regulations, but on the innovative and economically beneficial use of bivalves, like clams, to make an impact and reduce the number of red tide incidents across the state.

A look at the extraordinarily costly (\$36.5 billion) **data privacy bill** that nearly passed the Legislature in 2021 led to a follow-up report detailing what policymakers should be aware of, and stay away from, in the next round of what is the future of the regulatory space for governments across the world.

As the **supply chain crisis** began to affect industries across the state, TaxWatch research called attention to the CONNEX platform, an online database designed to help manufacturers better connect with prospective suppliers and develop business opportunities.

And in what might not appear to be on the “typical” TaxWatch research agenda, a report on **the importance of teaching Florida’s children to swim** helped usher in the first statewide action on encouraging parents to have their children attend swimming classes before the start of kindergarten. The impact of this report brought Rowdy Gaines, legendary Olympic swimming broadcaster to the Florida TaxWatch Spring Meeting to thank the team for its work on this life and death issue, long championed by Dr. Bill Kent, Chairman of the International Swimming Hall of Fame (and respected Florida TaxWatch Board of Trustees member).

But in no way has the organization’s research agenda made a departure from its tried-and-true staples, like the **Budget Turkey Watch Report**. The Report was first published in 1983 and promotes additional oversight and integrity in the state’s budgeting process based on the principle that: Because money appropriated by the Legislature belongs to the taxpayers of Florida, the process must be transparent and accountable, and every appropriation should receive deliberation

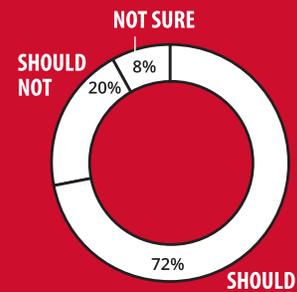
WE ASKED, YOU ANSWERED

In addition to our research agenda, TaxWatch has begun using public opinion polling to gauge the feelings of the state’s taxpayers. This helps make sure that our research is relevant, timely, and likely to make an impact in the Capitol.

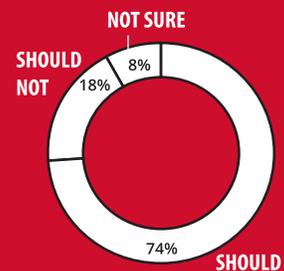
Among the questions asked in a 2021 poll by Florida TaxWatch:

Do you believe that Florida **businesses and health care providers** that act in good faith when reopening during the COVID-19 pandemic should or should not be provided protections from lawsuits?

PROTECTIONS FOR BUSINESSES



PROTECTIONS FOR HEALTHCARE PROVIDERS



FLORIDA TAXWATCH AGREES

Check out the report: *The Best Defense is a Good Offense: The Economic Impact of Protecting Responsible Floridians from COVID-Related Civil Liability*
@ floridatxwatch.org/research



SENATOR KELLI STARGEL SPEAKS AT THE TAXWATCH SPRING MEETING

and public scrutiny. The only organization in the nation that releases such a report, the Budget Turkey Watch report takes Florida TaxWatch staff months to develop, has saved the taxpayers billions over nearly four decades, and has ruffled more than a few feathers.

Programs Continue to Highlight Those Making Florida Better Every Day

The work of Florida TaxWatch extends past policies crafted in the Capitol. Two of our major programs provide special recognition to those truly making Florida a better place to live. The **Principal Leadership Awards** (PLA) Program continues to be one of the highlights of each year at Florida TaxWatch. The PLA Program annually identifies Florida's most effective principals in at-risk K-12 public schools, recognizes and rewards their work, and promotes their transformational practices throughout the state by recognizing the actions and approaches that have made the difference. The goal of the program is to improve student performance in at-risk schools, thereby closing the achievement gap.

In 2019, through a continued partnership with the Florida Prepaid College Foundation, the program continued the Academic A+ Scholarship Program, awarding one two-year prepaid scholarship to a student in each of our winning principals' schools.

Additionally, to further the part of our mission focused on the efficient and effective operations of government in Florida, the **TaxWatch Productivity Awards** (presented by Kyra Solutions, Inc.) program works to recognize, reward, and replicate the very best of state government staff, through an annual nominations and awards cycle unique to Florida.

Over the decades, the Productivity Awards have received more than 16,000 nominations for actions saving or avoiding more than \$11 billion in taxpayer dollars, or improving the quality and/or speed of service to the taxpayers.

WE ASKED, YOU ANSWERED

While the Florida TaxWatch research agenda is vast and spans nearly all aspects of state government, the Board of Trustees, partners, and supporters were surveyed in 2021 and produced the following list of top priorities:

- Ensure the integrity of the state appropriations process
- Promote economic growth
- Collaborate with state leadership on identifying measures to improve government efficiency and implement strategic cost-savings measures to balance the state budget and address budget shortfalls caused by COVID-19 pandemic
- Reduce and eventually repeal the business rent tax
- Overhaul of the state's procurement system, with focus on transparency, open competition, and commitment to focus on best outcomes for Florida's taxpayers
- Evaluate, revise, reestablish, and support appropriate and sound economic incentives through Enterprise Florida
- Advanced telehealth for hospitals, healthcare, and home health providers
- Strengthen Florida telecommunications and broadband infrastructure and tax policies
- Pursue prison population reduction strategies
- Monitor and evaluate consumer data privacy legislation
- Clarify the government leaseholds loophole
- Fix Qualified Improvement Property, Like-Kind Exchange and Corporate Tax Rate "glitches"
- Protect vulnerable youth and families
- Advance citizenship, civic engagement, and civil discourse

If your voice is missing from the chorus, or you have an issue that you think Florida TaxWatch needs to be engaged in, get involved! Reach out to us at 850.222.5052 or email tcarvajal@floridataxwatch.org.



CHAIRMAN-ELECT PIYUSH PATEL ADDRESSES THE AUDIENCE DURING A DISCUSSION OF THE TAXWATCH PRODUCTIVITY AWARDS, PRESENTED BY KYRA SOLUTIONS.



(L TO R) STEVE EVANS, RAY MONTELEONE, AND TAXWATCH SR. VP KURT WENNER DURING AN ENGAGING DISCUSSION AT THE TAXWATCH HEADQUARTERS

Investing in Florida Taxpayers

MANY FLORIDA COMPANIES AND ORGANIZATIONS HAVE SHOWN THEIR SUPPORT OF FLORIDA TAXPAYERS THIS YEAR by being generous contributors to Florida TaxWatch programs and events. Thank you for supporting the programs of Florida TaxWatch and making our independence possible.

If your company is committed to the taxpayers of Florida, and you want to make a difference each and every day, call us at 850.222.5052 and become a partner today.





STACY GROMATSKI DISCUSSES THE WORK OF FLORIDA TAXWATCH AND ITS PARTNERS ON VULNERABLE YOUTH AND FAMILY ISSUES IN THE CAPITOL



DOMINIC & DEBBIE
CALABRO

STEVE & LINDA
EVANS



TODD JONES AND JEFF BINKLEY WITH KEITH ARNOLD AT THE SPRING MEETING



REPRESENTATIVE CHUCK CLEMONS SPEAKS AT THE FLORIDA TAXWATCH SPRING MEETING



MARVA BROWN JOHNSON ADDRESSES THE PRINCIPAL LEADERSHIP AWARDS LUNCHEON



DAVID FAULKENBERRY AT THE SPRING MEETING OPENING RECEPTION

Principal Leadership Awards



2020-21 SPONSORS

THE FLORIDA LOTTERY
THE JM RUBIN FOUNDATION
FLORIDA PREPAID COLLEGE FOUNDATION
BRIGHTSTAR CREDIT UNION
CHARTER COMMUNICATIONS
FLORIDA PRESS ASSOCIATION
FLORIDA POWER & LIGHT
FLORIDA TREND
HELIOS EDUCATION FOUNDATION
FBMC BENEFITS MANAGEMENT
UNIVERSAL ORLANDO RESORT
VERIZON
DOMINIC & DEBBIE CALABRO
STEVE & LINDA EVANS

Building on more than four decades of serving Florida's taxpayers by improving government efficiency and taxpayer value in all areas of public policy, the Principal Leadership Awards program uses data to identify Florida's most effective principals in at-risk K-12 public schools, recognizes and rewards their work, and promotes their transformational practices throughout the state, in areas where educational success can transform a community.

Unlike other awards programs, our annual winners are not nominated by colleagues, or school boards, or superintendents. They are, in fact, not nominated at all. This awards program is a purely data-driven initiative.

Additionally, through this program's *Academic A+ Student Scholarship Program* (a partnership with the Florida Prepaid College Foundation), a deserving student at each winner's school receives a two-year prepaid scholarship to attend the Florida college of their choice.

2020-21 WINNERS

ELEMENTARY SCHOOL

Ms. Kori Hurst
RIVIERA ELEMENTARY SCHOOL (BREVARD)

Ms. Zulaika Quintero
IMMOKALEE COMMUNITY SCHOOL (COLLIER)

Ms. Violet Stovall
FORT CAROLINE ELEMENTARY SCHOOL (DUVAL)

MIDDLE SCHOOL

Mr. Sean Downing
OSCEOLA MIDDLE SCHOOL (OKEECHOBEE)

Mr. Sheriffee Humphrey
RENAISSANCE CHARTER SCHOOL @ PLANTATION (BROWARD)

Ms. Genell Mills
SCHOOL OF SUCCESS ACADEMY (DUVAL)

HIGH SCHOOL

Ms. Deborah Carter
DR. MARVIN DUNN ACADEMY FOR COMMUNITY EDU. (MIAMI-DADE)

Mr. Bryan Helms
INTERLACHEN HIGH SCHOOL (PUTNAM)

Mr. Brett Patterson
PINELLAS PARK HIGH SCHOOL (PINELLAS)

Supporting this program can transform the lives of students and their schools.

Reach out to us at 850.222.5052 or email tearvajal@floridataxwatch.org.



CITIZENSHIP INSTITUTE GRADUATES CLAY HOLLIS, AAKASH PATEL, KATHRYN HORTON, ALBIE KAMINSKY, EDWARD BRIGGS, AND ROBERT HOLROYD

Florida Citizenship Institute

Being a Florida TaxWatch Citizenship Institute graduate is more than just a line on a résumé.

Graduates learn first hand from Florida's most influential policy leaders and business executives how state and local government policies impact their community and their business, and the most effective ways to ensure that their voices are heard and respected.

Participants learn to understand the key points, whether issues have federal, state, or local components, whether they are statutory or administrative regulations, and what the differences mean to their business.

Do you know an up-and-coming executive that would be a great candidate for the Institute?

Apply today at floridataxwatch.org



OUTGOING CHAIRMAN SEN. PAT NEAL RECEIVING A LASTING MEMENTO OF HIS TIME AS CHAIRMAN FROM DOMINIC CALABRO



CHAIRMAN NEAL WITH ROBERT WEISSERT AND DOMINIC CALABRO IN THE CLOSING STAGES OF THE 2020 ANNUAL MEETING

A Virtual Transition

The 41st Florida TaxWatch Annual Meeting—the first to take place on video conference—saw the hand-off of the Chairman’s gavel from Senator Pat Neal to U.S. Senator George LeMieux, and the final meeting of Executive Vice President Robert Weissert.



Tax Watch Productivity Awards

Presented by **Kyra Solutions, Inc.**

Even though the co-founders of the program, J.E. Davis and A.D. Davis, are no longer with us, they would be proud to know that, since 1989, more than 16,000 nominations have been submitted totaling nearly \$11 billion in cost-savings, cost-avoidances, and added value to the lives of Florida's residents and visitors, including this year's total of more than \$500 million.

This year's winners come from nearly every state agency in Florida, and include everything from university professors, to transportation safety workers, to environmental engineers. Thirty-three years of this awards program has shown that Florida truly has the nation's best public employees, and we are excited to see what groundbreaking ideas and actions are still to come.

The distinguished members of the **Panel of Judges** donate their time for a thorough review and spirited discussion of the best of this year's achievements. A special thank you to this year's judges:

Dr. Matthew Duke ACCENTURE
Ms. Allison Harrell THOMAS HOWELL FERGUSON
Ms. Heidi Otway SALTERMITCHELL PR
Mr. Daniel Petronio CAPITAL CITY BANK GROUP
Ms. Zoraida Velasco FLORIDAMAKES

2021 SPONSORS

KYRA SOLUTIONS, INC.
FLORIDA COUNCIL OF 100
AVMED HEALTH PLANS
CAPITAL HEALTH PLAN
FLORIDA POWER & LIGHT
FLORIDA NETWORK OF YOUTH
& FAMILY SERVICES
BRANDT INFORMATION
SERVICES
WASTE MANAGEMENT
ACCENTURE
WELLS FARGO
FLORIDA TREND

PUBLIX SUPER MARKETS
CHARITIES
NORTH HIGHLAND
AJAX BUILDING CORPORATION
EY
FICPA
LEAD ENGINEERING
CONTRACTORS
TALLAHASSEE MEMORIAL
HEALTHCARE
DOMINIC & DEBBIE CALABRO
STEVE & LINDA EVANS

2021 WINNING AGENCIES

Agency for Persons with Disabilities
Dept. of Business and Prof. Regulation
Dept. of Children and Families
Dept. of Elder Affairs
Dept. of Environmental Protection
Dept. of Financial Services
Dept. of Juvenile Justice
Dept. of Management Services
Dept. of Corrections
Dept. of Health
Dept. of Revenue
Dept. of Transportation
Florida Atlantic University
Dept. of Agriculture and Consumer Services
Dept. of Law Enforcement
Dept. of Veterans Affairs
Florida International University
Florida State University
Florida Wildlife Conservation Commission
Guardian ad Litem Program
Judicial Administrative Commission
Office of Financial Regulation
University of Florida
Volunteer Florida

Our partners allow
us to promote &
recognize
efficiencies and
innovation among
dozens of state
agencies



THE 2021 STATE OF THE TAXPAYER EVENT LOOKED A BIT DIFFERENT FROM THE PREVIOUS FIVE

The State of the Taxpayer

2021 SPONSORS

NEAL COMMUNITIES
AVMED HEALTH PLANS
BAPTIST HEALTH SOUTH
FLORIDA
CHARTER COMMUNICATIONS
FLORIDA INTERNET &
TELEVISION
FICPA
GUNSTER

KEISER UNIVERSITY
KYRA SOLUTIONS, INC.
PUBLIX SUPER MARKETS
CHARITIES
TEAM HORNER
DOMINIC & DEBBIE CALABRO
STEVE & LINDA EVANS

As the trusted eyes and ears of Florida taxpayers for more than 40 years, Florida TaxWatch embraces our responsibility to provide a forum for our state's elected leaders to speak directly to the interests of the taxpayers.

While the annual State of the State address and opening statements of each legislative chamber cover the accomplishments and future plans of our elected leadership, none specifically highlights the issues affecting taxpayers.

As the premier event each Session for Florida's elected leaders to discuss the issues that will impact taxpayers over the next year, the dinner presents an all-star lineup of some of Florida's top policymakers addressing a capacity crowd, ensuring that as legislative session begins, **the attention of Florida's leaders is where it belongs: on the taxpayers.**

Become a partner and help us keep the focus on the taxpayers of Florida.
Reach out to us at 850.222.5052 or email tcarvajal@floridataxwatch.org.

TaxWatch has helped taxpayers to **BECOME BETTER INFORMED** about unnecessary government spending—and to make themselves, and government **BETTER ABLE TO DO SOMETHING ABOUT IT.**

— PRESIDENT RONALD REAGAN

What we've got in Florida TaxWatch is an **OLYMPIC-SIZED EFFORT** to make sure that public policy in the state of Florida is **SECOND TO NONE.**

— GOVERNOR BOB MARTINEZ

HEED TAXWATCH

— MIAMI HERALD EDITORIAL HEADLINE

The state is undoubtedly more healthy and prosperous because TaxWatch has been on the job. It has been **AN HONEST WATCHDOG** in warning of abuses, **A CREDIBLE GUIDE DOG** in finding thrifty solutions to problems, and **A TIRELESS BIRD DOG** in making sure taxpayers get their money's worth.

— TAMPA TRIBUNE

This is the first time in the history of the state of Florida that **ALL THREE MAJOR CREDIT RATING AGENCIES** have given us a **"AAA" BOND RATING...** it's because of being fiscal stewards of our resources...it's also **ATTRIBUTED TO THE GOOD FOLKS AT TAXWATCH HOLDING US ACCOUNTABLE.**

— FLORIDA CFO JIMMY PATRONIS

I cannot think of a more important time to have an organization like TaxWatch...an **INTELLIGENT WATCHDOG** that is **PAYING ATTENTION TO THE DETAILS** and **HOLDING OFFICIALS ACCOUNTABLE** to taxpayers.
– ATTORNEY GENERAL ASHLEY MOODY

The contribution of Florida TaxWatch is **UNPARALLELED IN THE HISTORY OF FLORIDA GOVERNMENT**, and deserves the thanks of all the taxpayers of Florida.
– US SENATOR & GOVERNOR BOB GRAHAM

...Fortunately for the legislators, **TAXWATCH** already has done much of **THEIR WORK FOR THEM.**
– ORLANDO SENTINEL

Florida TaxWatch **NEVER FORGETS OUR TAXPAYERS**...It's so important for government to have access to **TIMELY RESEARCH TO HELP MAKE SOUND DECISIONS**...TaxWatch is helping keep taxpayers informed.
– AGRICULTURE COMMISSIONER NIKKI FRIED

Florida TaxWatch is a testament to democracy in action...bringing a **VALUE-ADDED DIFFERENCE TO THE LIVES, HEALTH, AND PROSPERITY OF ALL FLORIDIANS** because of your constructive ideas and vision.

Thank you for your **UNRELENTING EFFORTS** to safeguard the long and short-term interests of the citizens of Florida.
– GOVERNOR JEB BUSH

Florida TaxWatch is **HELPING TO ENSURE THAT FLORIDA TAXPAYERS ARE WELL SERVED.**
– PRESIDENT GEORGE H. W. BUSH



FLORIDA LEGENDS GOVERNOR BOB MARTINEZ AND CHARLIE GRAY CATCH UP AT THE SPRING MEETING



ENTERPRISE FLORIDA PRESIDENT & SECRETARY OF COMMERCE JAMAL SOWELL ADDRESSES THE SPRING MEETING



CHAIRMAN GEORGE LEMIEUX IS JOINED BY SCOTT SHALLEY, HOLLY MILLER, AND DOMINIC CALABRO TO PRESENT HOLLY WITH A FRAMED COPY OF THE E-FAIRNESS BILL, THE "RANDY MILLER ACT," NAMED AFTER HER LATE FATHER



EXECUTIVE VICE PRESIDENT TONY CARVAJAL WITH SENATOR JIM BOYD



DR. BILL KENT PRESENTED DOMINIC CALABRO WITH AN AWARD FOR THE WORK OF TAXWATCH ON "EVERY CHILD A SWIMMER"



SECRETARIES SIMONE MARSTILLER, MARY MAYHEW, AND JOSIE TAMAYO WERE ALL FEATURED SPEAKERS AT THE SPRING MEETING



MS. ANDREA KEISER SPEAKS WITH CHAIRMAN GEORGE LEMIEUX AT THE SPRING MEETING

Volunteer Leadership

Florida TaxWatch has been fortunate over the past 42 years to have a remarkable group of volunteer leaders guide the organization.

From former Governors, to United States Senators, to leaders of both chambers of the Florida Legislature, to the state's most influential and well-known private sector leaders, few organizations can boast the leadership roster of Florida TaxWatch.

Co-Founders

Mr. James E. Davis (1907-1993)
CO-FOUNDER, WINN-DIXIE STORES, INC.

Mr. T. Wayne Davis
TINE W. DAVIS FAMILY FOUNDATION

Mr. Mark C. Hollis (1934-2012)
PRESIDENT, PUBLIX SUPER MARKETS, INC.

Mr. George Jenkins (1907-1996)
CO-FOUNDER, PUBLIX SUPER MARKETS, INC.

Sen. Philip D. Lewis (1929-2012)
FORMER PRESIDENT, FLORIDA SENATE

Sen. Kenneth A. Plante (1939-2015)
FORMER MIN. LEADER, FLORIDA SENATE

Past Chairmen

Sen. Pat Neal
2018-2020

Mr. David Mann
2016-2018

Ms. Michelle Robinson
2014-2016

Mr. John B. Zumwalt, III
2012-2014

Mr. Marshall Criser, III
2010-2012

Mr. David A. Smith
2007-2010

Mr. Michael A. Jennings
2005-2007

Mr. Barney Barnett
2003-2005

Mr. Steve Evans
2001-2003

Mr. T. O'Neal Douglas
1999-2001

Mr. Joseph P. Lacher
1997-1999

Mr. David McIntosh
1995-1997

Mr. Byron E. Hodnett
1994-1995

Mr. L. Charles Hilton, Jr.
1993-1994

Mr. Buell G. Duncan
1992-1993

Mr. Michael Zagorac, Jr.
1990-1992

Mr. T. Wayne Davis
1981-1982, 1988-1990

Mr. Tom L. Rankin
1986-1988

Sen. Philip D. Lewis
1984-1986

Sen. Kenneth A. Plante
1982-1984

Mr. Mark C. Hollis
1979-1981

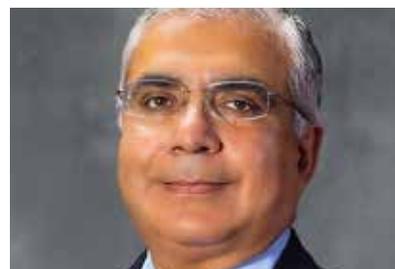
2020-21 Corporate Officers



CHAIRMAN
U.S. SEN. GEORGE S. LEMIEUX



PRESIDENT & CEO
DOMINIC M. CALABRO



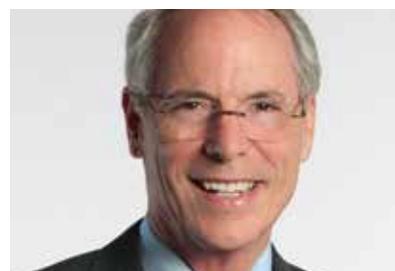
CHAIRMAN-ELECT
PIYUSH PATEL



TREASURER
JAMES REPP



SECRETARY
MARVA BROWN JOHNSON



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SENATOR PAT NEAL

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HOPE HEALTHCARE SERVICES

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KITSON & PARTNERS

Mr. John Provenzano
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Mr. Colin W. Brown
JM FAMILY ENTERPRISES, INC.

Ms. Belinda Keiser
KEISER UNIVERSITY

Ms. Michelle Robinson*
VERIZON

Mr. David Casey
MAXIMUS

Ms. Natalie King
RSA CONSULTING

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ADAMS STREET ADVOCATES, LLC.

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FLORIDA POWER & LIGHT

Mr. Steve Evans*
IBM (RET.)

Governor Bob Martinez
HOLLAND & KNIGHT

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Charles Gray*
GRAYROBINSON, P.A.

Stacy Gromatski
FLORIDA NETWORK OF YOUTH & FAMILY
SERVICES

James Harris
STATE GOVERNMENT CONSULTING

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Selected Research

Corporate Income Tax Issues for the 2022 Legislature

OCTOBER 26, 2021

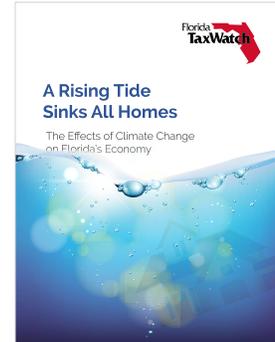
Federal corporate income tax reform, which had the general aim of broadening the base and lowering the rate, has reduced the federal tax burden on many corporations. Unless current law is changed, there will be another huge increase when the tax rate returns to its pre-tax reform rate of 5.5 percent (beginning with 2022 tax year). This could result in a tax increase of hundreds of millions of dollars, perhaps exceeding \$1 billion. This Briefing explains the need to make changes to Florida's tax laws.



A Rising Tide Sinks All Homes: The Effects of Climate Change on Florida's Economy

OCTOBER 20, 2021

Florida's climate is changing. The physical effect of changing climate translates into real economic impacts. In the short and long term, the changes will have disruptive physical and fiscal consequences for many taxpayers. This report is intended to help taxpayers and policymakers better understand the effects of climate change on each sector of Florida's economy and to recommend reasonable ways to mitigate those impacts.



Beyond the Pandemic: Long-Term Changes and Challenges for Housing in Florida

OCTOBER 19, 2021

As unexpected and unpredictable as COVID-19 has been, few could have predicted the housing boom that the pandemic ignited across the nation. Rapidly rising home prices have significantly affected the availability of affordable housing in Florida, which disproportionately impacts vulnerable populations such as low-income families. This report shows that if Florida is to remain competitive in a post-pandemic world, it must wrestle with the fact that expensive housing can, in some ways, be a hindrance to economic growth with disparate impacts on important subsets of the population.



Navigating Federal Pandemic Relief: Following Billions in Stimulus Dollars, Where Do We Go From Here?

OCTOBER 13, 2021

The global coronavirus pandemic brought on the largest post-war economic contraction in U.S. history. With the resulting financial hardship on citizens and businesses, record unemployment, and a loss of tourism, Florida's economy suffered. The massive amount of federal funding provided in the six stimulus acts provides an unprecedented opportunity to improve Florida and fund programs and infrastructure that have had long-standing backlogs with few past feasible opportunities to address to this degree. This report provides taxpayers with an easy-to-understand guide to the available funds.





DR. TIM MOORE (INDIAN RIVER STATE COLLEGE) WITH STEVE EVANS



BOB NAVE (RIGHT) SPEAKS TO SENATE PRESIDENT WILTON SIMPSON IN HIS CAPITOL OFFICE

Who Knows What? Analysis of Data Privacy Legislation in Florida

OCTOBER 11, 2021

Addressing the perceived need for consumer data privacy, governments across the world have begun extensively legislating on the safe handling and protection of personal information. Florida TaxWatch analyzed the potential costs of compliance and litigation that would result from a consumer data privacy law in Florida and estimated the compliance and litigation costs to be between \$6.2 billion and \$21.0 billion. *This review helped to prevent the bill from passing in 2021.*



Beyond the Pandemic: Long-Term Changes and Challenges for Leisure & Hospitality

SEPTEMBER 22, 2021

Just as the nation was entering a new phase of the COVID-19 pandemic—one where vaccination rates were rising and pent-up demand for travel started to unleash during the summer—the contagious delta variant exposed tourism’s lingering economic vulnerability. Factors such as low pay, lack of benefits, the opportunity for remote work elsewhere, and the ongoing unpredictability have spurred leisure and hospitality workers out of the industry. Looking beyond the current Delta variant surge, future tourism numbers and employment figures look promising for Florida’s recovery, according to this report.



2022 Legislature Should Reauthorize the Qualified Target Industry (QTI) Tax Refund Program

SEPTEMBER 22, 2021

There has been an ideological debate regarding economic development incentives brewing in the Legislature for several years. The Qualified Target Industry (QTI) Tax Refund Program is a performance-based program that refunds some of the taxes a business has already paid, but only after it is verified that the contracted requirements have been met, including the promised increase in high-wage jobs. Despite a significant return on investment (\$5 for every \$1 invested), the legislature has yet to reauthorize the QTI program, and this Briefing will hopefully have an impact on the 2022 Session.



Quarterly Review of the Progress of the Broward County Schools SMART Program

In 2015, Broward County Schools asked Florida TaxWatch to provide research and analyses to the bond oversight committee to aid them in effective oversight of their bond process. In our limited role performing a watchdog function, Florida TaxWatch produces and presents a research report on industry and national “best practices” to help the committee lay the foundation for its oversight of the bond-funded capital outlay program. Each quarter, Florida TaxWatch reviews quarterly reports submitted to the bond oversight committee by the school district and presents its findings at quarterly committee meetings to aid the Bond Oversight Committee in holding the district accountable for spending decisions.



Red Tide Mitigation Using Southern Hard Clams

SEPTEMBER 7, 2021

Recent outbreaks of red tide along the Southwest Florida coast and Tampa Bay region have threatened the continued health of beaches and inland waterways, but the effects could be mitigated by the reintroduction of southern hard clams. The importance of healthy Florida beaches and inland waterways to the state's economy cannot be overstated. This report shows that the reintroduction of southern hard clams could be an effective and environmentally sustainable method for mitigating the impacts of red tide blooms on the economy of the Tampa Bay region and the public health of its residents and visitors.



Beyond the Pandemic: Long-Term Changes and Challenges for Postsecondary Training

AUGUST 26, 2021

This report details how shifting demographics as the Baby Boomer generation exits the labor force will also fuel broader changes for the working population. For these reasons, the needs of the future workforce place a premium on human skills development—equipping individuals with the requisite skills to be prepared for a workforce full of disruption and displacement. Increasingly, postsecondary institutions and industry will both be crucial to training workers for an ever-evolving economy.



Beyond the Pandemic: Long-Term Changes and Challenges for Florida's Workforce

JULY 21, 2021

This report looks at how, in many ways, Florida's current workforce looks starkly different from when it first entered the pandemic over a year ago. Challenges with controlling the spread of COVID-19 precipitated the widespread use of remote work and other digital formats across the state. These changes accelerated workforce trends that were present before COVID-19 (such as automation) and now foreshadow a future workforce that will constantly face disruption and displacement.



Supply Chain Resiliency in the Face of Economic Disruption: Connex Florida as a Platform for Resilience

JULY 19, 2021

Supply chains are expansive networks of suppliers, manufacturers, distributors, and retailers that facilitate the movement of products to consumers. The COVID-19 pandemic, however, has exposed the vulnerabilities inherent in a globally connected world. Connex Florida serves as a platform to bolster supply chain resiliency in the face of future disruptions and promote the state's economic growth. By promoting collaboration and connectivity, the online database tool provides manufacturers and suppliers with many diverse solutions to bolster supply chain resiliency. This report shows the importance of such an interconnected system.



2021 Taxpayers Guide to the FY2021-22 Florida State Budget

JUNE 30, 2021

Florida's FY2021-22 \$101.6 billion state budget, which went into effect July 1, 2021, is the largest in the state's history. In addition to many facts and figures explaining this year's budget, this guide also provides past data to put it in historical context in a handy, easy-to-carry pocket guide for on-the-go information.



Beyond the Pandemic: Long-Term Changes and Challenges for K-12 Education in Florida

JUNE 25, 2021

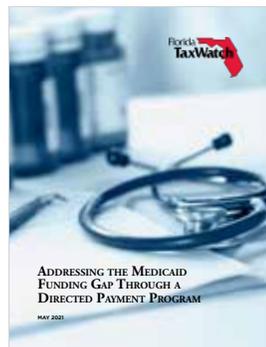
Due to COVID-19, the collective weight of school shutdowns, distance learning, and outside stressors had an immediate and adverse impact on student learning. This unprecedented disruption in learning, especially for K-12 students, raises concerns about what unfinished learning may mean for academic achievement, mental health, and social development in the future. The future changes and challenges in the K-12 space are daunting, but not insurmountable, and are explored in this report.



Addressing the Medicaid Funding Gap Through a Directed Payment Program

MAY 27, 2021

Higher than projected General Revenue collections, coupled with billions of dollars of federal stimulus funding, permitted the House and Senate to avoid cutting more than \$300 million in hospital Medicaid funding for FY 2021-22. Despite Florida's economic recovery, Florida's hospitals struggle to provide care for the more than four million Floridians who rely on Medicaid for their health care while mitigating the impacts of COVID-19. A Medicaid Directed Payment Program helps hospitals address the gap between the cost of care and the payment received through Medicaid by unlocking additional federal funds.



2021 Budget Turkey Watch Report

MAY 24, 2021

Three decades after it was first introduced, the Florida TaxWatch Budget Turkey Watch Report is now a Capitol staple. Budget Turkeys are items placed in individual line-items or accompanying proviso language that are added to the final appropriations bill without being fully scrutinized and subjected to the budget process. The 2021 Budget Turkey Watch report identifies 116 appropriations worth \$157.5 million that did not receive the deliberation, debate, and accountability they deserve. *This year, Governor DeSantis vetoed 83 percent of the projects identified in this report.*



Beyond the Pandemic: Long-Term Changes and Challenges for Health in Florida

MAY 21, 2021

The COVID-19 pandemic fundamentally changed the health care landscape across the U.S. From ushering in broader adoption of telehealth services to increasing the incidence of behavioral health issues and handling a larger population of elderly residents, the pandemic has created long-term changes and challenges that will likely persist for years to come.



State COVID-19 Restrictions & the Road Back to Economic Normal

APRIL 29, 2021

State responses to the pandemic have been diverse and complex, with some instituting strict restrictions on businesses and others rolling back restrictions at a faster pace. At the same time, vaccine roll-outs are accelerating, and state economic recoveries seem to be on varied paths with some approaching pre-pandemic levels of employment faster than others. Florida TaxWatch offers a cursory look at the relationship between state COVID-19 restrictions and their respective economic recoveries by running a preliminary correlation test between the two measures.



Revisiting Efforts to Deregulate Florida's Electric Power Market: What We Learned from Texas' Blackouts

APRIL 27, 2021

Two years ago, voters rejected a constitutional amendment that would have required Florida to "deregulate" its retail market for electric power. In a deregulated market (like Texas), customers choose their electricity provider from among any number of retail electricity suppliers available in their area and pay the market rate for electricity. During a 2021 cold weather event in Texas, prices for electricity skyrocketed, reaching \$9,000 per kilowatt hour. This Briefing shows that what we have in Florida has been shown to work exceptionally well.



The Backbone of the Economy: How Small Businesses in Florida Have Fared During the Pandemic

APRIL 22, 2021

As identified in this report, small businesses are major drivers in the Florida economy, spurring local job creation and innovation while also fostering entrepreneurship. Most small businesses will continue to endure slim operating margins as cash inflow will depend on consumer confidence. For Florida, since most small businesses are directly or indirectly related to the Leisure and Hospitality industry, they may continue to lag behind broader U.S. recovery efforts until a general uptick in tourism resumes.



Calling for Clarity: Florida's Confusing and Conflicting Scheme for Taxing Government Leaseholds Needs Legislative Attention

APRIL 14, 2021

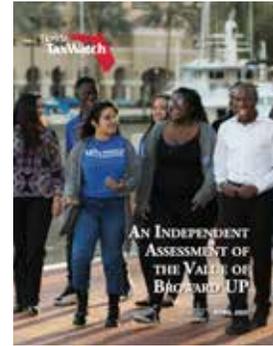
Florida's taxation of government-owned property when it is leased by a non-government entity falls well short of the goals for good tax policy, including fairness, simplicity, transparency, and ease of administration. It has been shaped more by the courts than the Legislature. The Florida Legislature undertake a comprehensive review of the taxation of governmental leaseholds, decide what is the best interests of Florida, and rewrite the law to achieve that goal. *This report was the genesis of the new Coalition for Clarity in Florida Tax Law, lead by Florida TaxWatch.*



An Independent Assessment of the Value of Broward UP

APRIL 13, 2021

This report calls attention to a program that is changing the future of its community. Pioneered by Broward College, Broward UP seeks to increase college access, improve degree and certificate attainment, and raise economic mobility in six Broward County ZIP codes with disproportionately higher rates of unemployment and lower educational attainment relative to surrounding areas. By providing free, in-demand courses, Broward UP holistically reduces intergenerational poverty in communities and creates various economic and fiscal benefits.



Calling all Cars? Florida's Statewide Law Enforcement Radio System Underscores the Need for Procurement Reform

APRIL 6, 2021

The Statewide Law Enforcement Radio System (SLERS) is a single 800 MHz unified digital radio network that permits state law enforcement officers and other first responders across the state to communicate more effectively. In 2016, the state initiated an unsuccessful Invitation to Negotiate to replace the aging SLERS equipment, which is nearing end-of-life, with a new, non-proprietary, mission critical P25 (SLERS-2) network, which would improve and expand SLERS coverage, reliability, and audio clarity. This project points out some of the flaws in Florida's procurement system and underscores the need for procurement system reform.



Florida's Proposed Privacy Protection Act

MARCH 29, 2021

Due to the proliferation of data-driven products and services over the past few years, many countries and states around the world have adopted laws relating to the data collection and use of personal information. In Florida, a proposed consumer data privacy law would create more than \$36.5 billion in initial compliance costs, with disproportionate impacts for small and medium-sized businesses. *This report helped ensure that the bill offered in 2021 was not passed, but is expected to come back up for discussion in 2022.*



Economic Commentary: The State of Medicaid in Florida

MARCH 25, 2021

This report points out that even as the economic recovery begins to take form in Florida, the challenges confronting the state's Medicaid system are daunting. Projected budget shortfalls for Medicaid in FY 2021-2022 would require lawmakers to make important decisions for the Medicaid budget to ensure access to quality health care for Florida's most vulnerable residents.



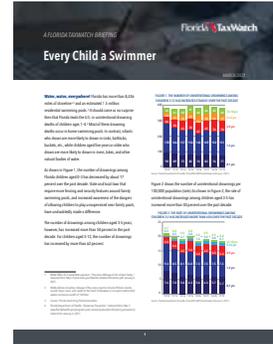
COVID-19 AND HIDDEN COVID-19 RISK

Category	Value
Total Medicaid Enrollment	10,436,000
Medicaid Enrollment by Age Group	
0-17	1,100,000
18-24	1,200,000
25-34	1,300,000
35-44	1,400,000
45-54	1,500,000
55-64	1,600,000
65-74	1,700,000
75+	1,800,000

Every Child a Swimmer

MARCH 22, 2021

Water, water, everywhere! Florida has more than 8,436 miles of shoreline and an estimated 1.5 million residential swimming pools. Florida leads the U.S. in unintentional drowning deaths of children ages 1-4, and more than one-half of all Americans either cannot swim or lack all the basic swimming skills. The real tragedy lies in the fact that most of these childhood drownings could be prevented by making sure everyone in the family knows how to swim. *This report helped the 2021 Legislature pass Florida's first bill with the goal of making sure that every school-aged child can swim (likely to save 100+ lives in its first year), and was called "The finest piece of research I have ever read" by Dr. Bill Kent of the International Swimming Hall of Fame.*



Economic Commentary: The Economic Impact of COVID-19 on Florida's Employment

FEBRUARY 22, 2021

According to this report, Florida's post-pandemic economic recovery picture seems to be a mixed bag. The state closed out 2020 on an optimistic note as unemployment inched downward to 6.1 percent from a high of 13.8 percent in April 2020, but as January 2021 drew to a close, first time jobless benefit claims rose by more than 71,000 across the state. On the surface, the pandemic has crippled the tourism industry, yet a deeper dive reveals other important, more nuanced, variations across industries, regions, and income levels.



INDUSTRY VARIATIONS

Industry	Unemployment Rate (2020)
Manufacturing	6.1%
Retail Trade	13.8%
Healthcare	6.1%
Education	6.1%
Government	6.1%
Professional Services	6.1%
Information	6.1%
Finance	6.1%
Real Estate	6.1%
Arts, Entertainment, and Recreation	13.8%
Accommodation and Food Services	13.8%
Transportation and Warehousing	6.1%
Utilities	6.1%
Construction	6.1%
Other Services (except Public Administration)	6.1%
Public Administration	6.1%

A Decade of Self-Taxing: Florida Voters Have Approved \$10.8 Billion in Local Taxes & Bond Issues Since 2010

FEBRUARY 9, 2021

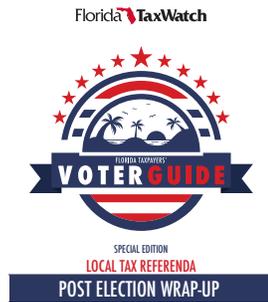
Despite the political pressures to avoid all tax increases, this report shows that Florida voters over time have chosen to tax themselves significantly, when they see a tangible value for doing so. While the Florida Legislature has passed tax cuts every year since 2009, Floridians have voted to increase their own taxes 142 times, approving taxes worth \$4.8 billion on an annual basis. In addition, voters have approved 72 bond issues worth \$6.0 billion.



Post Election Wrap-Up: Local Tax Referenda

SUNDAY, NOVEMBER 15, 2020

In the November 2020 elections, Floridians decided the fate of six proposed amendments to the Florida Constitution. As if that were not enough, voters across the state had to consider more than 200 local referenda, including some significant tax increases. Nineteen counties approved 20 sales tax and property tax increases worth \$400 million. Voters in ten counties approved the enactment or extension of ten local sales tax levies worth more than \$250 million annually, and nine counties passed ten different ad valorem levies totaling almost \$150 million annually.



After COVID-19: Rethinking How the State Delivers Services to Floridians in Need

NOVEMBER 12, 2020

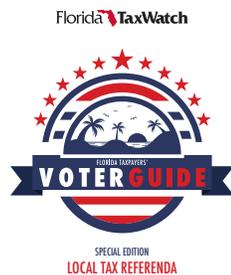
Application surges during the COVID-19 pandemic exposed the shortcomings of the current state-administered, federal safety net programs, especially the Reemployment Assistance (Unemployment Insurance) program. This report explores Florida's opportunity to implement more efficient and cost-effective business processes, thus reducing the size of government, saving the taxpayers money, and improving service delivery to Floridians in need.



2020 Voter Guide Special Edition: Local Tax Referenda

OCTOBER 21, 2020

Florida taxpayers have shown they are willing to pay more taxes if they feel the return will be worth it. Voters made a significant commitment to fund local government services in the 2018 elections when they approved 26 county-wide tax increases worth \$1.5 billion, four special district tax hikes, and \$1.2 billion in new bond issues. In the 2020 elections, voters across the state will determine the fate of scores of local referenda and amendments to city and county charters. Many of these ballot questions have significant fiscal implications for Florida taxpayers. Voters considered authorizing more than \$360 million annually in local tax increases, all outlined in this handy guide.



2020 How Florida Compares: Taxes

OCTOBER 19, 2020

This report is part of our larger How Florida Compares series, which is intended to help Floridians better understand their state through data. This report, like each report in this series, provides neutral, nonpartisan information on where Florida ranks compared to our 49 sister states and the national average.



Treasurer's Report

Dear Members,

Florida TaxWatch further expanded its statewide representation of taxpayer concerns in Florida during the fiscal year that ended September 30, 2021. This widening support demonstrates the recognized quality and enhanced public value of the institution's mission and research program accomplishments. During this fiscal year, Florida TaxWatch continued to adhere to the sound fiscal standards required of such a respected research institute.

According to the year-end record of expenses, all expenditures went to prepare, conduct, publish, disseminate, and properly communicate the research program's findings, conclusions, and recommendations about Florida government tax and spending policies and practices.

No funds were expended on lobbying activities, as specifically restricted by the Institute's Articles of Incorporation and Bylaws.

The Treasurer's Report for FY2021 demonstrates the sound management practices and proper financial controls applied by the institute which ensure effective and productive operations with direct accountability.

According to the financial statement and Treasurer's Report, total expenses were slightly less than \$2,026,355 while total revenue slightly exceeded \$2,306,565, generating a net positive for the fiscal year.*

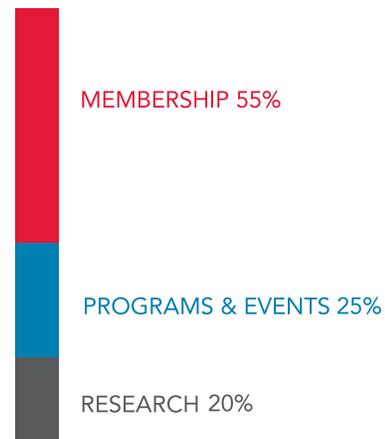
Respectfully,



Mr. Jim Repp
Treasurer

* Unaudited

FY2021 INCOME



FY2021 EXPENSES



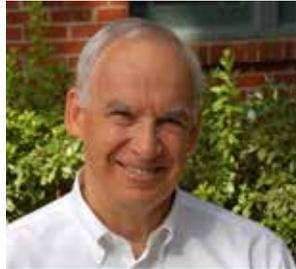
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RESEARCH ECONOMIST
JONATHAN GUARINE



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KATHERINE DUNN



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ACCOUNTANT
TERRI REA

NOT PICTURED

FORMER STAFF
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CAROLYN GOSSELIN
KYLE BALTUCH

INTERNS
CAITLYN BERGMAN
ASHLEY FLYNN
SHAFQUIL MUSHNA
REED ROLLINGS

We Believe

You cannot bring about prosperity by discouraging thrift

You cannot strengthen the weak by weakening the strong

You cannot help small men by tearing down big men

You cannot help the poor by destroying the rich

You cannot lift the wage earner by pulling down the wage payer

You cannot keep out of trouble by spending more than your income

You cannot further the brotherhood of men by inciting class hatreds

You cannot establish security on borrowed money

You cannot establish character and courage by taking away a man's initiative and independence

You cannot help men permanently by doing for them what they could and should do for themselves

— From the pen of Reverend William John Henry Boetcker (1873-1962)
& often attributed to Abraham Lincoln



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