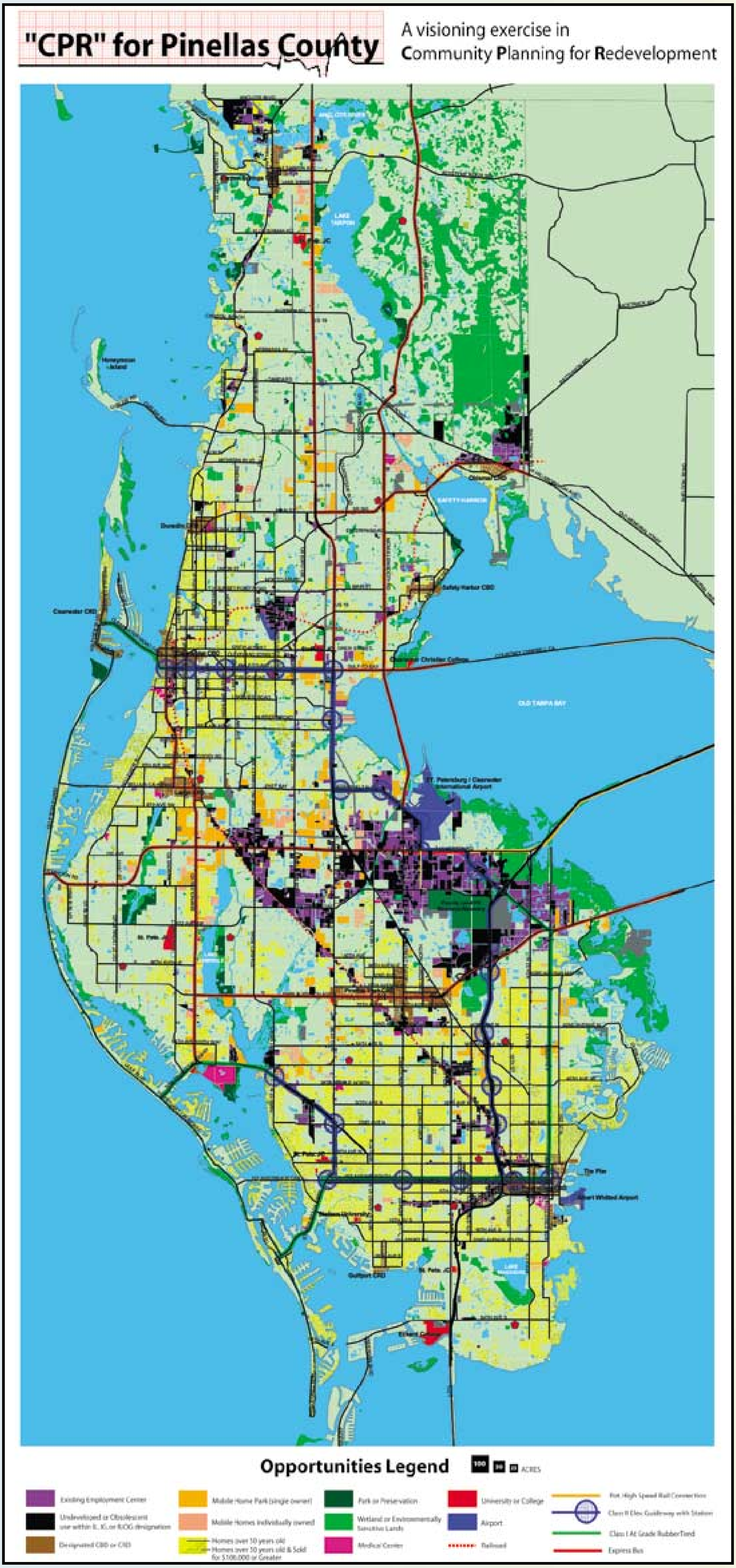
THE OPPORTUNITIES SUMMIT FINDINGS

ECONOMIC DEVELOPMENT AND REDEVELOPMENT FOR THE PINELLAS COMMUNITY

PINELLAS BOARD OF COUNTY COMMISSIONERS
PINELLAS PLANNING COUNCIL

APRIL 2003


"CPR" for Pinellas County
A visioning exercise in Community Planning for Redevelopment
LAKE TARPON
Honeymoon Island
Dunedin
SAFETY HARBOR
Safety Harbor CBD
Clearwater CBD
Clearwater Christian College
OLD TAMPA BAY
St. Petersburg / Clearwater International Airport
The Pier
Albert Whitted Airport
Gulfport CRD
Eckerd College
Opportunities Legend
100
ACRES
Existing Employment Center
Undeveloped or Obsolescent use within IL, IG, or R/OG designation
Designated CBD or CRD
Mobile Home Park (single owner)
Mobile Homes individually owned
Homes over 50 years old
Homes over 50 years old & Sold for $100,000 or Greater
Park or Preservation
Wetland or Environmentally Sensitive Lands
Medical Center
University or College
Airport
Railroad
Pot. High Speed Rail Connection
Class II Elev. Guideway with Station
Class I At Grade RubberTired
Express Bus

Acknowledgements

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Executive Summary

Introduction

In Pinellas County, as we reach buildout, a condition sets in that we must overcome or else we will join a list of mature counties that have seen their economic strength erode and their quality of life decline. As development opportunities grow more difficult, time-consuming and complex, an important shift takes place. We must involve ourselves with issues of sustainable planning, smart growth, infill, mixed use, transportation value capture, and CBD/downtown redevelopment. It will take a new breed of planners, developers, and civic leaders to get the job done. We are all in a *partnership* to define and implement the recycling of Pinellas County.

Ulmerton Road, Gateway District - aerial photography by Ignacio Correa-Ortiz

It requires planners and developers who think strategically and act creatively in their approach, and have the ability to sell their vision to communities, neighborhoods, taxpayers, community leaders, investors, and lenders. Creative planning and strategic approaches are the principles on which *The Economic Development and Redevelopment Plan for the Pinellas Community* must be founded. Be creative and strategic. That is our core message today as we transmit *The Opportunities Summit Findings*.

Pinellas…a Community of Quality Communities. Let this be our great passion.

Initiating a Redevelopment Plan

Recognizing that vacant land was becoming scarce in Pinellas County and wanting to define a future development plan to maintain a vibrant economy and sustainable quality of life for the county, two planning agencies took aggressive action. The Board of County Commissioners, working through the Economic Development Department and the Pinellas Planning Council, formed a strategic planning alliance to create *The Economic Development and Redevelopment Plan for the Pinellas Community*.

The project is part of a three-phase planning effort. The first phase concentrated on forming a consensus about redevelopment issues facing the county, and resulted in the publication of *Redevelopment Issues and Strategies for Pinellas County*. The second phase deals with creation of a comprehensive countywide economic development and redevelopment plan. Lastly, the third phase addresses the complexities of plan implementation. This document is a summary of findings from the second-phase community event called the "Economic Development and Redevelopment Opportunities Summit For The Pinellas Community" held on December 12th and 13th 2002, at the Harborview Center in Clearwater, Florida.

A Steering Committee chaired by Commissioner Karen Seel, Chairman of the Pinellas Board of County Commissioners, guides the planning program. The Steering Committee works through a management committee led by the County Administrator, Steve Spratt, and his senior staff, including the Director of Economic Development for Pinellas County, Richard "Buzz" David, in conjunction with the Executive Director of the Pinellas Planning Council, David Healey. The management committee, in turn, directs the efforts of the consulting team consisting of the following persons and firms:

Richard E. Gehring, Prime Interests, Inc. - Principal in charge of strategic programming and development management

William Fruth, POLICOM, Corp. - Economic development adviser and economist

Richard Dutter, Dutter Design & Consulting, Inc. - Real estate planning, GIS-based urban planning and design

James Moore Ph.D. and Ignacio Correa-Ortiz, HDR Planning Group - Urban design and regulatory strategies

Summit Overview

In the day and a half of the Summit, some 400 people registered and over 340 attended on the first day and more than 150 on the second day. Recognizing the Summit's importance, Progress Energy provided a sponsorship grant. Channel 18, the Pinellas County government channel, prepared a significant "Progressive Pinellas" program on the Summit. The *St. Petersburg Times* in a general editorial recognized the broad benefit of redevelopment planning and economic expansion through primary job generation and redevelopment activities. The full presentation materials of the Summit are posted on the Economic Development Department's web page (*www.siliconbay.org*) and can be reviewed in their entirety.

The Summit was designed to be a community-wide workshop structured to present, discuss, and reach general consensus on economic development and redevelopment opportunities. The event was publicized and promoted through press releases, TV and radio spots, mailings, and media articles. Attendance was considered a success because of the level of participation by target business and government audiences. For the first major public outreach effort, the breadth and depth of participant background were remarkable. Participants, who were eager to define and set direction for economic development and redevelopment opportunities, included community representatives and elected officials, together with public administrators and planners from all major communities. Private sector planners and design professionals from architecture, engineering, and landscape architecture firms contributed to the presentation and discussion. Development and real estate interests from both residential and commercial backgrounds also attended. Finally, nonprofit organizations, along with educators and media representatives, rounded out the Summit audience.

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Introductions and welcome were extended by outgoing BCC Chairman Commissioner Barbara Sheen Todd and incoming Chairman Commissioner Karen Seel. County Administrator Steve Spratt emphasized the importance of this effort in setting the direction for major county policy and management initiatives. Appreciation was expressed for the Progress Energy sponsorship and for the programming and organizational efforts of the Department of Economic Development and the Pinellas Planning Council.

The presentation format involved three focal points: economics, focusing on primary job generation; real estate, focusing on land dynamics and availability; and urban design, which emphasized physical structure and quality of life issues. To set the stage for the discussions, the development manager and principal in charge of the project, Richard Gehring from Prime Interest, Inc., presented a general project overview and a snapshot of Pinellas County in a regional context.

Redevelopment Findings and Opportunities

Our vision is to reinforce Pinellas County as "A Community of Quality Communities." What underlies this findings report is a fundamental sense of urgency in directing long-term planning, or else facing a quite plausible decline in our quality of life. In order to realize the vision and avoid decline, the Opportunities Summit was organized to be a community-wide workshop structured to present, discuss, and reach general consensus on economic development and redevelopment opportunities. The participation and ideas generated through the Summit process have established a strong foundation on which to build the *Economic Development and Redevelopment Plan for the Pinellas Community.* The objective of the plan is to unlock, and set direction to achieve, the economic, real estate, and physical design opportunities identified through the Summit process.

Findings

Economics

- The physical condition of having limited vacant land is called buildout.
- As a result of reaching physical buildout, and absent positive actions, the county's economy will begin to decline in both size and quality by the year 2008.
- Local economies grow and expand, decline and fall, in direct proportion to the money flowing into an area.
- The *size* of a local economy is determined by the amount of money being imported. The *quality* of the economy is dependent upon the wage level paid to the workers employed in the primary industries.
- Money flows into a local economy as a result of the *primary* or *contributory* industries. A primary business in not dependent upon the local marketplace for its success.
- Economic development, the recruitment and retention of primary businesses, is ultimately a real estate transaction.
- The economic goal for Pinellas County is to create over the next 20 years sufficient industrial/commercial facilities necessary for the attraction/expansion/retention of high-wage primary/contributory employers.

Real Estate

- Pinellas County is approaching physical buildout, particularly with respect to real estate available for primary employers. However, continued development is not only inevitable, it is essential to the sustainability of the community. Redevelopment of aging and obsolete uses will provide the real estate needed to insure that the Pinellas County of tomorrow remains strong economically and maintains a high quality of life.
- The monetary value of real estate is inversely related to its value to the economic health of a community.
- The most expensive real estate is typically the retail corner. Values diminish as the potential use changes from retail to residential then to office. Typically, at the bottom of the value scale within an urbanized environment is land suitable for industrial uses. However, properties suitable for industrial and office uses are the most valuable from an economic health perspective.
- Land currently planned or zoned to accommodate primary employers is disappearing at a high rate. The problem is that the conversion of land suitable for primary employers to some other use also means fewer employment opportunities, less of a ratable tax base, less of a reason to want to live in Pinellas for employment opportunities, and less chance for the sustained economic health and quality of life within the county.
- Most of Pinellas County is developed at residential densities and non-residential intensities significantly lower than that allowed by the *Countywide Comprehensive Plan.*
- Far too often development incentives are applied to pieces of real estate as opposed to specific targeted uses. The result of this strategy is often the immediate inflation of real estate value by the landowner, thereby negating any significant incentive to the end user. Our economic development/redevelopment planning strategies must protect our incentives so that they are received by those who we target.

Urban Design

- The key issue confronting the county as it looks forward, is the fact that while it is relatively dense, particularly by comparison to the rest of the state, it is not urban.
- The planning efforts of a county need the benefit of creative design.
- The challenge in moving from a suburban to a more urban pattern is to concentrate all the diverse elements of community development and redevelopment.
- One needs the right *mix* of uses, there must be an appropriate *mass* of each use, and they all must *mesh* together effectively.
- Faced with impending buildout, Pinellas County does not really have the luxury of simply evaluating the merits of redevelopment, or of limiting redevelopment efforts to one type of project or one type of developer. Rather, a framework must be created in which the broadest range of participation is encouraged.
- Summit participants supported the premises that the right investment decisions, suitable land uses, appropriate transportation, and skillful design at the correct scale will go a long way towards addressing the problems of Pinellas County in the future.
- Redevelopment requires commitment, along with the adoption of comprehensive policies and application of specific strategies.

Opportunities

Economics

- Adopt policies that reduce, as much as possible, the cost of operating in Pinellas County for primary employers which meet the wage goal.
- Reduce as much as possible the time necessary for site plan approval and building permit issuance for new construction or renovation of structures to be used by primary employers which meet the wage goal.
- Create a series of financial incentives for primary employers which meet the wage goal to encourage the renovation of structures. This includes, but is not limited to, significantly increasing the permitted density/intensity for appropriate sites, grants, low interest loans, and tax abatements.
- Identify geographic pockets of dilapidated and deteriorating structures and raze them to create new site development opportunities.
- Identify pockets of structures in need of renovation and rehabilitation, modernize the horizontal infrastructure, and create incentives to encourage the owners to consistently modernize the structures.
- Create a comprehensive program which will provide modern housing for the work force of high-wage primary employers within a convenient commuting distance from the place of employment.
- Identify the primary industrial sectors that pay a wage which meets the goal, to determine their specific structure needs, and base some of the renovation program on this information.

Real Estate

- Existing or new primary employers require real estate suitable for their business use. Within Pinellas County, these opportunities primarily occur by:
  - Developing remaining vacant land
  - Developing grayfields or other scrapable sites
  - Retrofitting obsolescent buildings and eliminating site design inefficiencies
- A significant amount of increased primary employment opportunity is available through retrofitting existing structures, in combination with more efficient use of land surrounding them.

Urban Design

- Develop true urban nodes and centers at key locations throughout the county.
- Redevelop commercial arterial strips to enhance mobility and reinforce desirable neighborhood patterns.
- Develop nodes and corridors along the proposed transit system route.
- Redevelop under-utilized retail property as mixed-use centers.
- Seek optimal redevelopment of known and potential brownfield sites.
- Even in very suburban locations, look to integrate mixed-use neighborhood centers into the residential fabric.
- Make the benefits of redevelopment obvious, the impacts acceptable, and the outcome predictable.

Overview and Background

Introduction

The Summit was structured to define direction and provide consensus building on key opportunities that would form the structural framework for an economic development and redevelopment plan. The three parts of the planning task consist of, first, assisting in building a vision and policy commitment for pursuing a quality economic development planning process; second, defining and integrating redevelopment plans and economic development market strategies from all levels of government into a cohesive direction; and third, with vision and plans in hand, focusing on aggressive implementation to achieve the results desired by the community. If the first two tasks are successful, an empowerment condition will be created. If the third task is guided by a plan with community consensus, there will be stakeholder ownership and buy-in for the required resource allocation and policy continuity. It is not an easy task for community leadership and citizen participants to pursue the reinventing of a county. The alternative of taking no action, however, is to lose control of our future.

Regional and Local Overview

General Description

Pinellas County, positioned on the west coast of Florida, is part of a complex area known as the Tampa Bay region. It forms a metropolitan statistical area that includes Pinellas and the surrounding counties of Hillsborough, Pasco, and Hernando. It constitutes the 13th largest media market in the United States, and is one of Florida's most balanced economies with strong manufacturing and tourism activity.

There are 2.5 million people within 25 miles of the region center; 3.5 million within 50 miles; and 5.5 million within 75 miles, even though a considerable amount of that area is in the Gulf of Mexico. Approximately a third of Florida's population is in the greater Tampa Bay region. Tampa Bay defines the principal geographic feature of the region, which has long opened the area to commerce and trade due to its dynamic waterfront resources and facilities.

Pinellas County is a peninsula surrounded by water; except for one minor landmass on the north end of Lake Tarpon, the county would actually be an island. Because of its impressive natural amenities and attractive residential surroundings, coupled with its small-scale development pattern, it has exhausted most of its "greenfields" vacant land and is approaching buildout. The urban form of Tampa Bay extends north into Pasco County, predominately driven by less expensive land values than in Pinellas. Hillsborough, to the east, is a dynamic county with considerable land area, and it contains the primary urban center of Tampa.

Land and Demographics

Pinellas County consists of approximately 280 square miles of land area. Only Union County in north Florida is smaller. With 180,000 acres, Pinellas has 155 square miles of incorporated area in 24 municipal jurisdictions, and 125 square miles of unincorporated land, fragmented into numerous discontinuous areas.

According to the 2000 Census, Pinellas County contains about 920,000 people. The growth rate between 1990 and 2000 was approximately 8 percent. The low percentage of change is a strong indicator of the built-out condition of the county.The Bureau of Economic and Business Research (BEBR) has projected a 2020 maximum population for the county of approximately 1.2 million. This increase of 280,000 to 300,000 people will be in response to the economic and lifestyle attractiveness of the county.

An important factor in our demographic character is the annual in-migration of approximately 50,000 persons.

An important factor in our demographic character is the annual in-migration of approximately 50,000 persons. Due to negative birthrate and out-migration, it takes that number of new residents per year for Pinellas to retain its current population before it can start to realize any population growth. In a ten-year period, as the county population gets younger, it will recycle half of its population.

Pinellas County is generally organized around the following land use categories:

Land Area	Acres	% of Land Area
Residential	86,489	46.3%
Mixed Use	5,297	2.8%
Commercial	7,742	4.1%
Industrial	10,867	5.8%
Parks/Open	59,833	32.1%
Other	16,455	8.8%

Pinellas County has a significant insurance policy for maintaining its land value. Water and its correlation to waterfront property, when measured on a countywide basis, creates over 400 miles of coastal edge. These 2 million linear feet of waterfront property insulate and stabilize land areas from loss of value, and encourage redevelopment, due to the tremendous desire for waterfront property. In addition to its extensive coastal edge, county and municipal governments have set aside over 30 percent of the county in recreation, open space, and preservation areas. This important amenity base amplifies the water edge by maintaining the significant habitat and unique recreational resources that enhance county attractiveness.

Economic and Business Climate

Ratable/Taxable Value

A useful and dynamic indicator of community conditions is the tax base. The Pinellas County tax base, with over 400,000 parcels, is a measurable indicator currently valued in excess of $50 billion. Monitoring investment in new development will be a tool to identify static and devaluing areas of the county, and the value of the county and its subparts will be analyzed extensively. Investment and the benefits that come with it are the primary goals of the redevelopment and economic development effort.

Capital Effort

Development follows investment, and public capital improvements are primary indicators of where private investment will take risks when these improvements occur. New bridges, roads, schools, improved parks, water and sewer systems, and comprehensive drainage solutions are critical to recycling areas. The county capital improvement program anticipates spending approximately $5 billion over a five-year period. The aggregate municipal capital effort is in excess of $5 billion. The School Board has recently invested over half a billion dollars in land and facilities. Government expenditures, principally through transportation improvements, constitute another $3 to $5 billion. Investment of new dollars will be a key tool to create incentives and land assembly strategies to stimulate redevelopment and economic development.

Structural Age

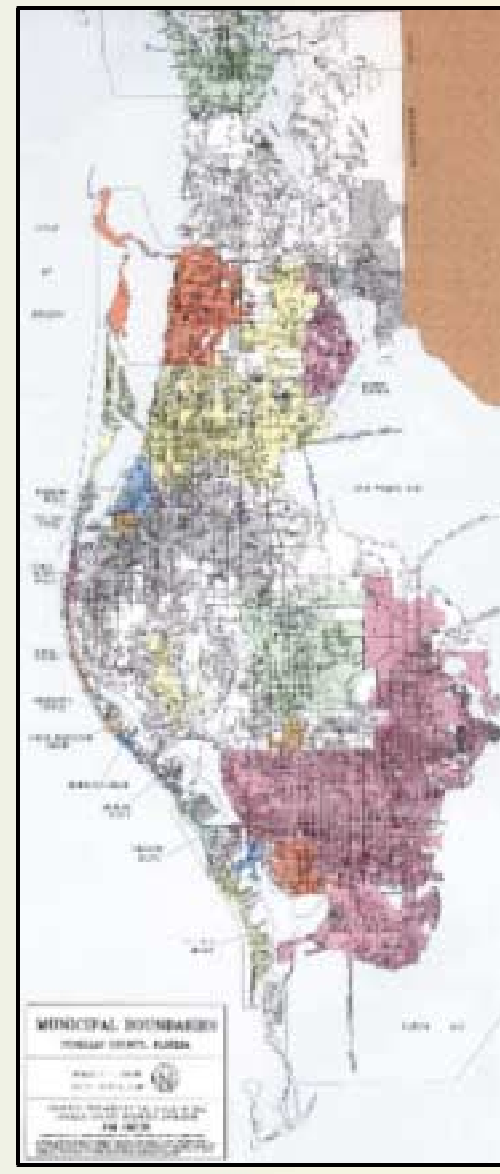
The oldest development in the county followed high ground areas, in the south county surrounding St. Petersburg, and in the north county surrounding Clearwater. Approximately 121,000 structures were in place by the midpoint of the 20th century. Therefore, that many structures fall into the greater than 50-year age category, and when mapped by taxable value, there is a strong correlation between lower value and age of structure. That relationship is not correlated in all conditions; numerous older structures maintain and increase their value and in fact, are enhanced by their age. Age and commercial structures are also key components to the attractiveness for employment location, and are discussed extensively in the economic and real estate sections of this document.

Business Condition

The county's economy is predominately driven by smaller businesses. There are over 33,000 businesses and 550,000 employees in the county, but only 700 businesses have more than 100 employees, and over 3,500 have fewer than 20 employees. Approximately 50,000 members of the work force are employed in manufacturing, with a dwindling 20,000 employed in the construction industry. A dynamic characteristic of the area is that the Tampa Bay region will attract, by 2005, one million new jobs. The key question is how many of those jobs can be brought to Pinellas County, and what efforts and incentives will be needed to continue to develop a strong primary employment base.

Market Position

Pinellas County has one of the strongest and most diverse economies in Florida. It has developed, in parallel, a robust manufacturing and tourism base. It has also attracted a retirement population that is 100 percent greater than the national norm, and the government payment transfers this population receives have significant impacts on the local economy. The future growth corridor to the north along the Suncoast Parkway will utilize Pinellas County as a beach amenity area. Primary employment has been expanding in the past decade, but this may change in the future, due to the limitation on readily-available vacant land. The economic and real estate sections of this document present in detail the condition and the potential of the Pinellas economy.



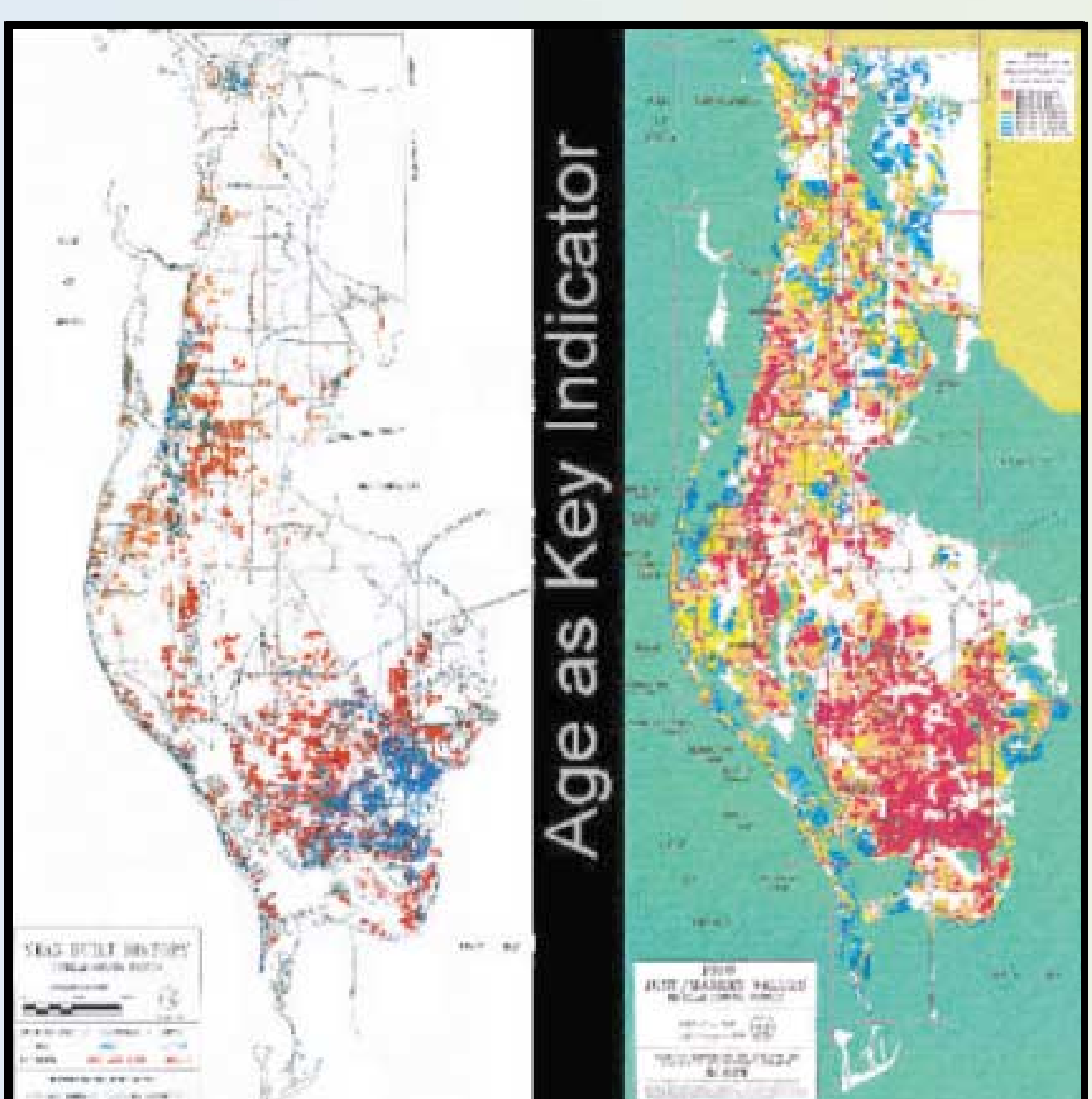
Quality of Life

The way in which we live, work, and play, coupled with our ability to meet our needs for goods, services, and education, create our identity as a community. How we use our space, our natural amenities, our man-made resources, and our time in movement, employment, and leisure add up to what we call *quality of life*. Our sense of place in the community is defined in our urban environment. Our parks and open space, our views and vistas, help us enjoy or regret the time we spend in our community. The urban design section of this document presents an opportunity assessment of how we can evolve into a better place to live, work, and play.

Buildout

The physical condition of having limited vacant land is called *buildout*. That condition challenges us to find the means to reinvent our county for a sustainable future that will include an ever-improving economy, which is supportive of a population working to improve its quality of life. How do we prepare for impending buildout? We do it through better utilization of the land, more efficient transportation, less auto dependency, and an aggressive program of resource allocation to create the best communities possible. The redevelopment planning process has as its goal the conversion of a potential negative influence, i.e., land buildout, into a positive community force.

Our Vision is to Reinforce Pinellas County as a Community of Quality Communities.

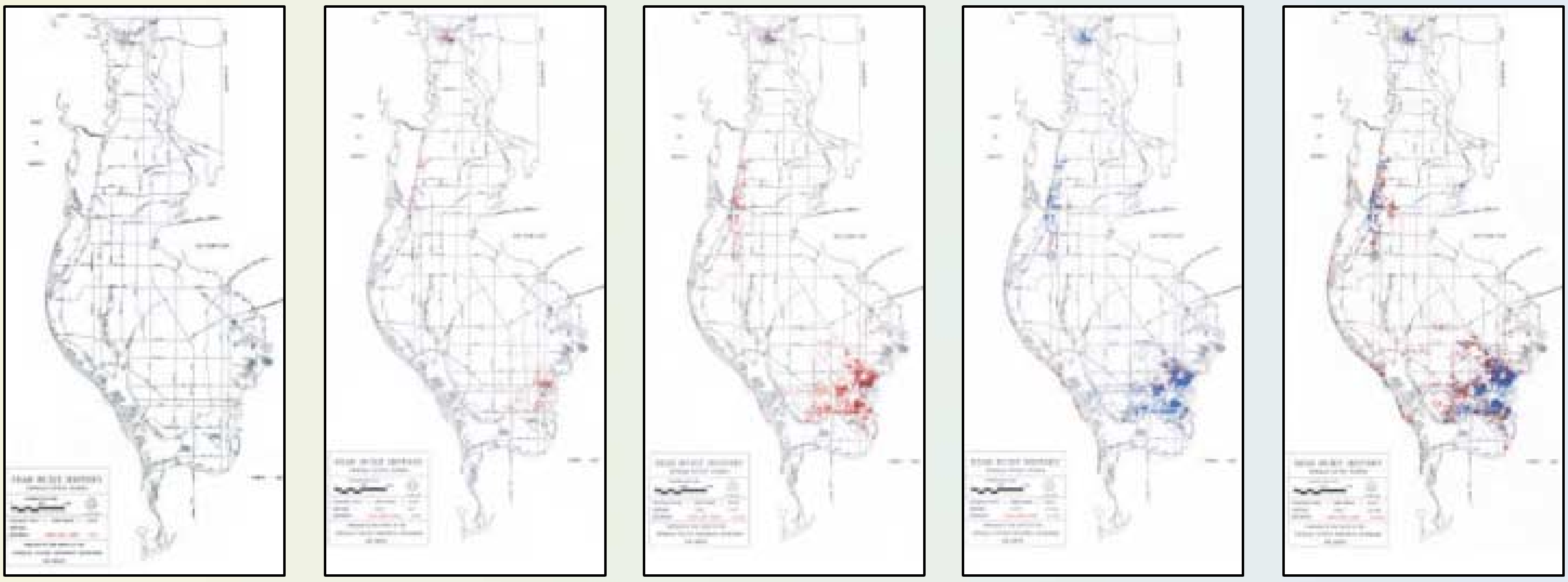


100 years of Pinellas County – how did we get where we are?

Pinellas County had only pioneer structures prior to the beginning of the 20th century. Older areas of St. Petersburg, Clearwater, Dunedin, and Tarpon Springs predate sawcut lumber. They created the early Florida homesteads of Pinellas with docks for coastal packets, general stores, and the first community churches and schools.

Decade after decade, Pinellas County underwent urbanization. Numerous economic and migration trends impacted the spurts of growth that were sometimes minor, but often major, as the county evolved. We learn from history what land areas changed first, and how high grounds were utilized, avoiding barrier islands and the risk of low areas. The corresponding costs of maintaining these less stable areas are with us today. The following graphics present the ten growth decades (1900 to 2000) of Pinellas County. They create a good historical picture of how we got where we are today. Hopefully, this will help us decide where we wish to go tomorrow.

Growth of Pinellas County, 1910-2000



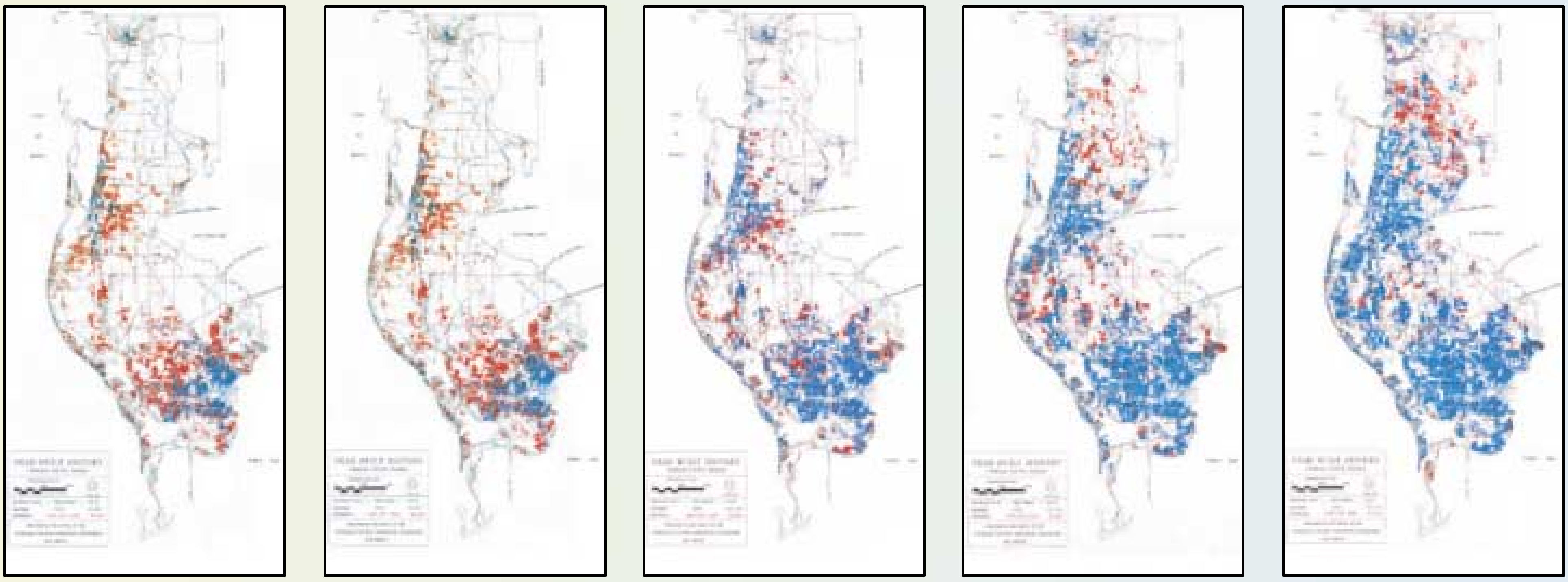
1910
Total structures: 227

1920
Total structures: 1,727

1930
Total structures: 17,252

1940
Total structures: 22,998

1950
Total structures: 40,508



1960
Total structures: 121,503

1970
Total structures: 181,422

1980
Total structures: 280,359

1990
Total structures: 361,193

2000
Total structures: 379,313

Tarpon Springs c. 1920

Economics

Introduction

Pinellas County has enjoyed significant growth in both the size and the quality of its economy over the last 20 years. However, as a result of reaching physical buildout in the near future, the long-term projections show the economy will begin to decline in both size and quality within the next six years. To prevent this from happening, the community needs to develop programs which will assure a sufficient supply of modern industrial facilities will be available for use by high-wage contributory employers in the future.

Pinellas County, Florida has a population greater than 250 of the 318 metropolitan areas in the United States. It has had, over the last ten years, exceptional economic growth, while the growth rate in population has been relatively slow. The size and quality of the Pinellas economy has grown at a rate comparable to the top 20 percent of the metropolitan economies.

Local economies grow or decline in size and in quality. The *size* of a local economy is determined by the amount of money being imported. In other words, size relates to the total amount of money being earned and/or the total number of jobs in the area. The *quality* of the economy is dependent upon the wage level paid to the workers employed in the primary industries. That is, the quality of the economy relates to the standard of living and is measured by the earnings per worker.

Local economies grow and expand, decline and fall in direct proportion to the money flowing into an area. Money flows into a local economy as a result of the *primary* or *contributory* industries. A primary business is not dependent upon the local marketplace for its success. The primary or contributory businesses are those which economic development organizations attempt to recruit.

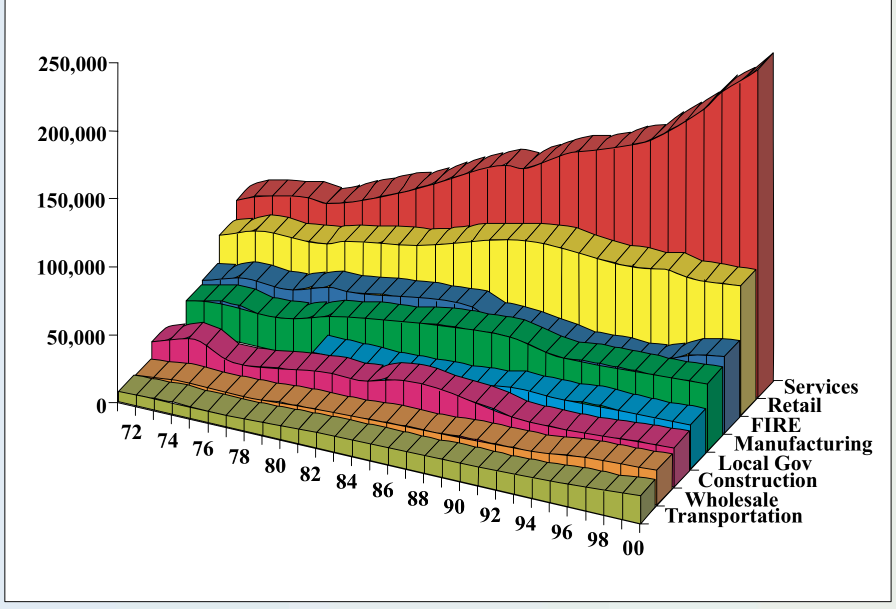
Local economies grow and expand, decline and fall in direct proportion to the money flowing into an area.

For a vast majority of local economies, the business activity of these companies, which sell their goods or services outside the area, imports most of the money to an area. Typically, nine out of ten local businesses are dependent upon the money being imported by the primary businesses.

Size and Quality of the Pinellas County Economy

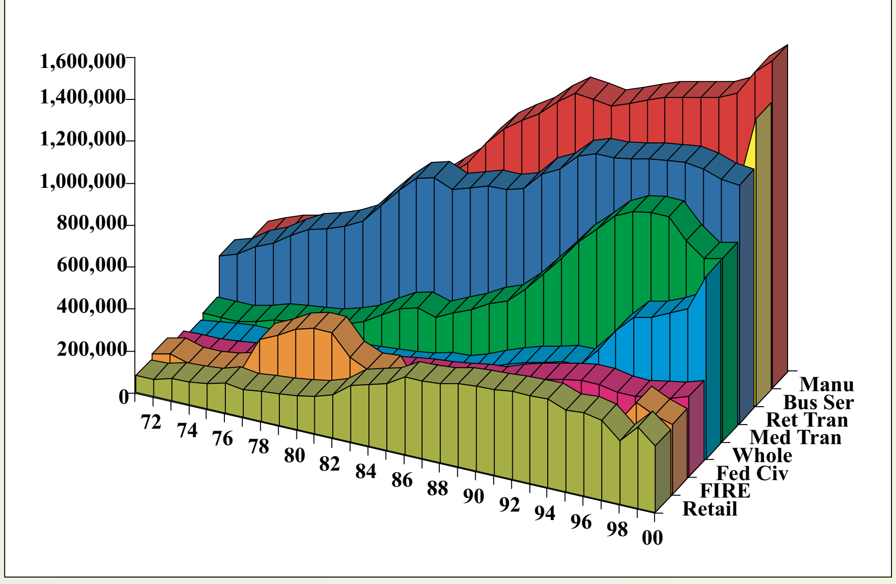
The services industry in Pinellas County has had the fastest growth in total employment as is the case in most economies in the United States. Business services, which includes the high-wage, sophisticated computers services and programming sector, has enjoyed extremely rapid growth over the last five years and is a leading contributor. The following graphic shows the employment history for the eight largest industrial sectors from 1971 to 2000.

Pinellas Employment, 1971-2000



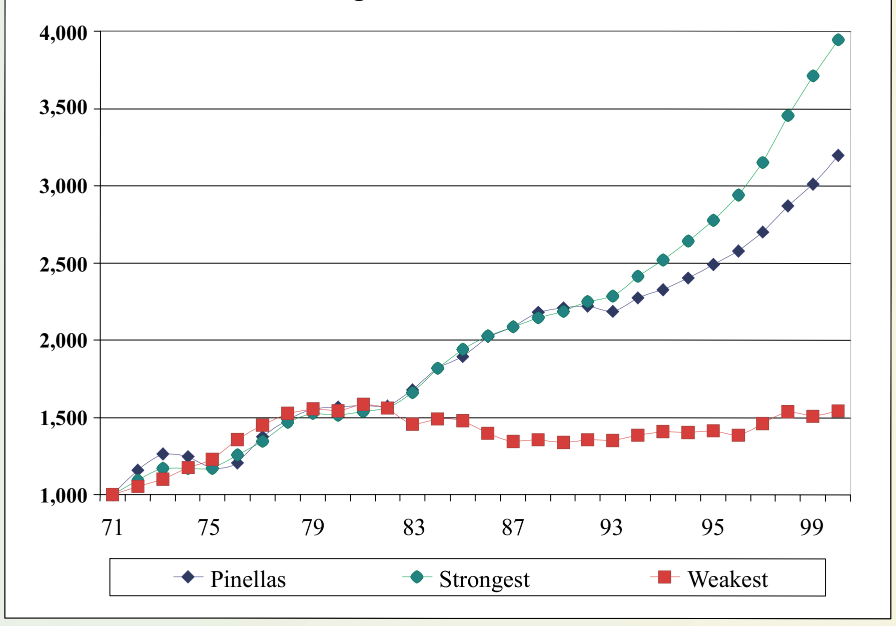
The following graph represents an estimation of the source and amount of money flowing into Pinellas County. For some areas, the state or federal government is contributory and in others, government entitlement programs serve as primary industries, as there is a net gain from what is being extracted by way of taxation and what is being returned to an area. The manufacturing division is the greatest contributory industry, but government transfers for retirement and medical reimbursement, when combined, become the single biggest contributor.

Pinellas Primary Industry Earnings, 1971-2000 (in thousands)



To illustrate the relative growth in the size of the Pinellas County economy, the following graph shows the inflation adjusted total worker earnings for the area compared to the ten strongest and ten weakest metropolitan area economies in the United States.

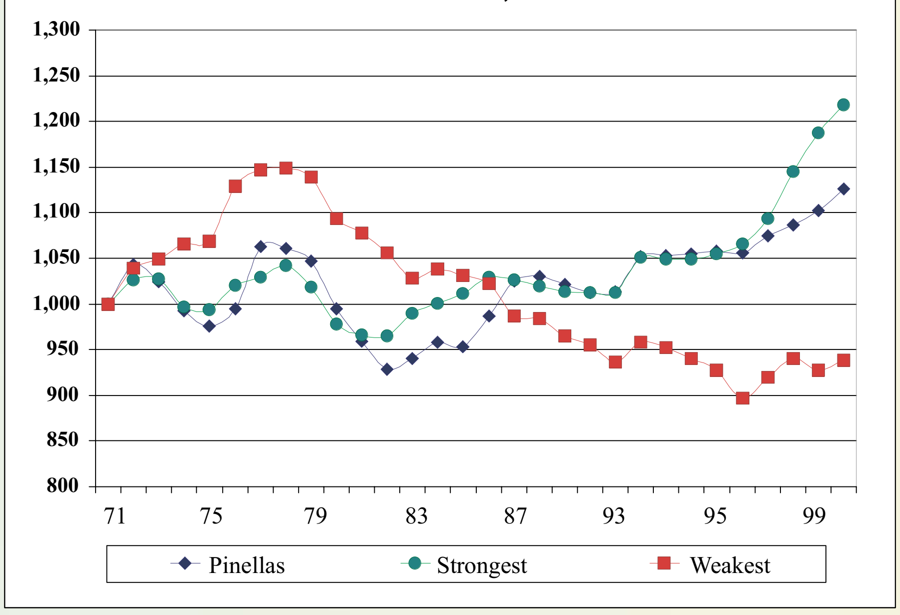
CPI Ratings, Factored, 1971-2000



Note how the growth in size was as good as the ten strongest areas until about 1991. At that time, it slowed, but has still been better than a vast majority of the local economies in the country.

One means to measure the growth in the quality of the economy is to study the "inflation factored annual earnings per worker" (AEPW). The following graph shows the improvement in the quality of the Pinellas County economy compared to the ten strongest and the ten weakest metropolitan areas in the United States using AEPW statistics.

CPI Factored AEPW, 1971-2000



The quality of the Pinellas County economy improved as well as the ten strongest areas until 1998 when it slowed. However, the overall improvement over the last 20 years has been exceptional. This is the result of creating a large number of high-wage contributory jobs over that time period.

The annual percentage increase for 118 economic factors for five time periods has been calculated for the county. The rate of increase has been ranked against the 318 metropolitan areas. The following table shows the annual growth rate and rank for Pinellas County for some of these factors (AEPW = Annual Earnings Per Worker). Note that construction growth has been very slow. This is directly related to the slow growth in population.

Pinellas 1991-2000	**Annual Growth**	**Rank x/318**
Population	0.74%	215
Per Capita - Personal Income	3.91%	209
Earnings - All Workers	6.60%	53
Employment - All Workers	2.61%	81
AEPW - All Workers	3.90%	47
Earnings - Construction	4.09%	269
Employment - Construction	0.86%	269
AEPW - Construction	3.18%	121
Earnings - Transportation and Utilities	8.42%	30
Employment - Transportation & Public Utilities	4.08%	41
AEPW - Transportation & Public Utilities	4.23%	47
Earnings - Wholesale Trade	10.37%	5
Employment - Wholesale Trade	3.97%	33
AEPW - Wholesale Trade	6.12%	8
Earnings - Retail Trade	3.78%	265
Employment - Retail Trade	0.05%	305
AEPW - Retail	3.76%	53

Effect of Reaching Buildout

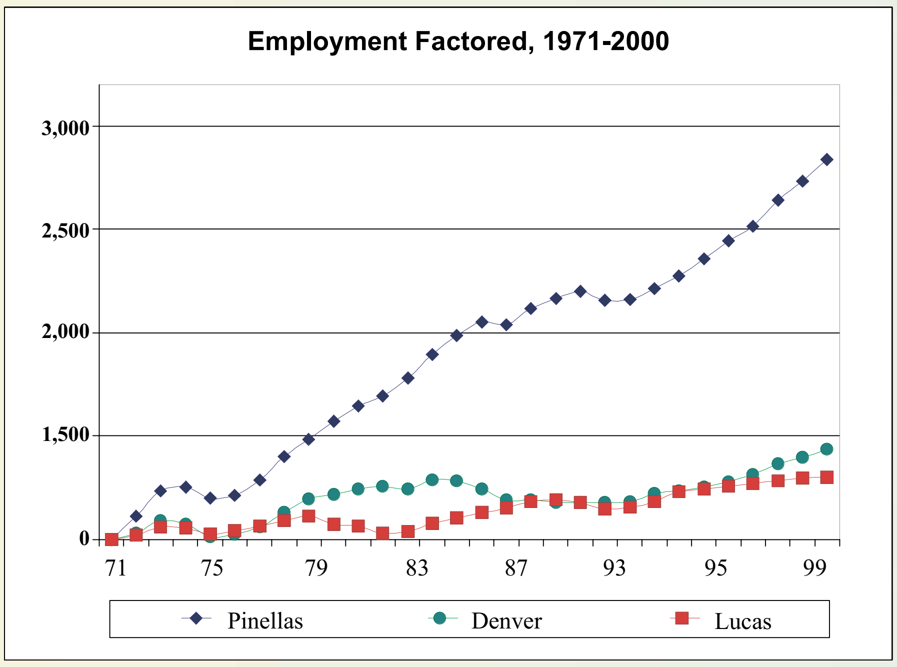
While creating economic projections for Pinellas County, a significant problem was discovered. *The county will likely reach physical buildout of its greenfield industrial land within four to six years.*

Economic development, the recruitment and retention of existing primary businesses, is ultimately a real estate transaction. Since contributory companies need a facility in which to function, and since they do not have to be in a particular location for their enterprise (they sell their goods or services outside the area), communities which do not have a sufficient supply of industrial space are less competitive.

When a city or county reaches buildout, new contributory businesses cannot locate there. As a result, economic growth begins to slow. Existing contributory companies, which need to expand, have no place to build and are forced to leave. Consequently, the economy begins to decline. As time goes by, existing industrial facilities start to deteriorate, finally reaching a point when they are abandoned, causing more companies to leave, thus accelerating economic decline as less money flows into the area.

Existing industrial facilities typically have a useful life of 40 to 50 years. During this time, the wages paid to the workers occupying the buildings gradually decline as the buildings begin to deteriorate.

Two counties, Denver, Colorado and Lucas, Ohio were examined for the effect of buildout. Each is of comparable size to Pinellas County and reached buildout more than 20 years ago. The following graph compares the employment growth among all three counties. Note how there was employment decline in each during the late 1980s and early 1990s and modest growth since.



Economic Projections and Goals

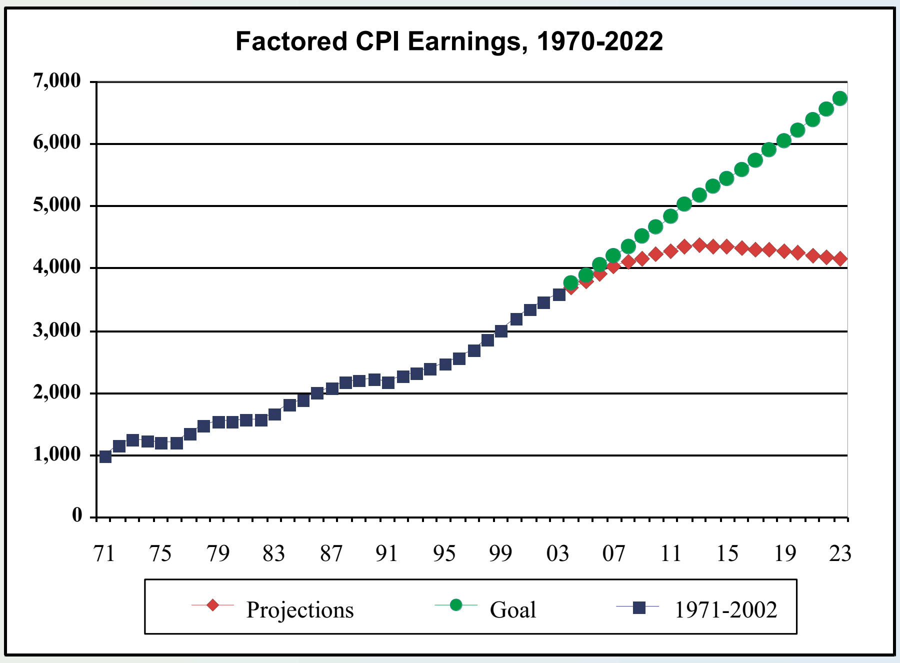
POLICOM Corporation has created economic projections for Pinellas County based upon reaching physical buildout. Additionally, POLICOM has created an economic goal for the county based upon the assumption the community will find a means to create sufficient industrial/commercial facilities necessary for the attraction, expansion, and retention of high-wage contributory employers. If the goal is achieved, the quality of the economy will continue to improve.

The economic goal for Pinellas County is to create over the next 20 years sufficient industrial/commercial facilities necessary for the attraction/expansion/retention of high-wage primary/contributory employers.

Since the size of a local economy is dependent upon the amount of money being imported to the area and the quality is dependent upon the wages paid by the primary industries, POLICOM has created annual milestones for Pinellas County, which if achieved, will cause the goal to be achieved. The following are those milestones:

GOAL Pinellas	**New Jobs**	**New Job Wage**	**Area Average Wage**	**% of Area Average**
2003	2,352	44,750	34,628	129%
2004	2,449	45,745	35,775	128%
2005	2,519	47,530	36,960	129%
2006	2,592	49,380	38,183	129%
2007	2,667	51,299	39,447	130%
2008	2,658	53,051	40,726	130%
2009	2,645	54,918	42,021	131%
2010	2,718	57,188	43,361	132%
2011	2,794	59,551	44,747	133%
2012	2,872	62,011	46,180	134%
2013	2,544	64,107	47,689	134%
2014	2,189	65,873	49,283	134%
2015	2,237	67,887	50,938	133%
2016	2,286	69,960	52,657	133%
2017	2,336	72,094	54,442	132%
2018	2,387	74,291	56,297	132%
2019	2,055	76,260	58,325	131%
2020	1,701	78,158	60,543	129%
2021	1,727	80,911	62,858	129%
2022	1,754	83,766	65,273	128%
2023	1,782	86,727	67,793	128%

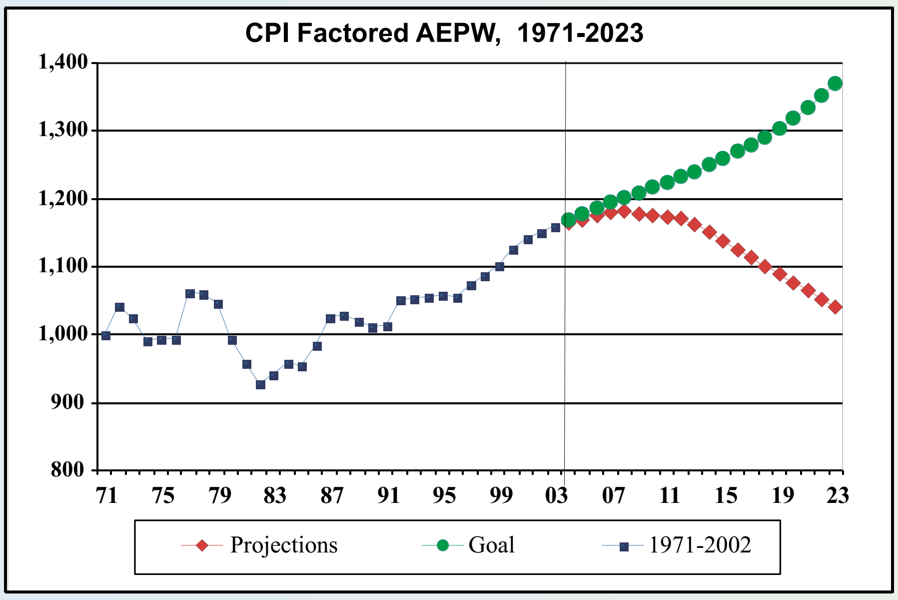
The following graph shows the impact of the projections and reaching the goal upon the size of the economy, i.e., the inflation factored earnings.



If no positive actions are taken and the negative projections come true, the overall size of the economy, after adjusting for inflation, will stop growing circa 2009 and begin to decline around 2011. This is the result of not being able to accommodate new high-wage primary businesses and a transition from existing high-wage businesses to low-wage businesses resulting from building deterioration and lack of land.

As the county approaches buildout, the growth in the quality of the economy will slow. After buildout, the quality will rapidly decline as low-wage workers replace high-wage workers because their employers will leave.

If the goal is achieved, the size of the economy will continue to grow at a brisk rate, similar to what it has done previously. The following graph shows the impact upon the quality of the economy of reaching the goal.



Should the goal not be achieved, high-wage jobs will be replaced by low-wage jobs, causing the quality of the economy to dilute and decline, as shown in the projections above.

The preceding table shows the annual net gain of new primary jobs and necessary wage level needed to achieve the goal. However, the goal cannot be achieved unless the community addresses the anticipated facility needs of the companies which will employ the workers, along with the facilities needed for the spin-off jobs created by those companies.

Issues/Opportunities to be Addressed

The following are some of the issues local governments in Pinellas County need to address:

- Adopt policies which reduce, as much as possible, the cost of operating in the county for primary employers which meet the wage goal. (Labor, educational resources, utilities, taxes, and others factors affect the cost of doing business.)

- Reduce as much as possible the time necessary for site plan approval and building permit issuance for new construction or renovation of structures to be used by primary employers which meet the wage goal.

- Create a series of financial incentives for primary employers which meet the wage goal to encourage the renovation of structures. This includes, but is not limited to, significantly increasing the permitted density/intensity for appropriate sites, grants, low interest loans, and tax abatements.

- Identify geographic pockets of dilapidated and deteriorating structures and collectively raze them to create new "brown-green fields."

- Identify pockets of structures in need of renovation and rehabilitation and cause the horizontal infrastructure to be modernized and create incentives to encourage the owners to consistently modernize the structures.

- Create a comprehensive program which will provide modern housing for the work force of high-wage primary employers within a convenient commuting distance from the place of employment.

- Identify the primary industrial sectors that pay a wage which meets the goal, to determine their specific structure needs and base some of the renovation program on this information.

Downtown St. Petersburg

Real Estate

Introduction

Pinellas County has been in a continuous process of re-inventing itself since its very beginnings. Little physical evidence remains from the early settlers who first established permanent residence here in 1832. The second half of the 20th century has primarily been characterized by consistent expansion and infill of development spreading from established urban centers toward the hinterlands. However, as vacant land becomes more scarce, changes within Pinellas, like many urbanized communities, are becoming more evidenced by removal or renewal of existing structures rather than the development of vacant real estate.

The Pinellas community is approaching physical build-out, particularly with respect to real estate available for primary employers. However, continued development is not only inevitable, it is essential to the sustainability of the community. Redevelopment of aging and obsolete uses will provide the real estate needed to ensure that the Pinellas County of tomorrow remains strong economically and maintains a high quality of life.

The Need for a "Self-Implementing" Plan

As we move forward with the economic development/redevelopment planning process, we need to understand that the forces which cause economic growth are based on business decisions. Our economic development and redevelopment plans and strategies, therefore, must be clearly beneficial to entrepreneurs, or they will not be implemented. Any successful economic development plan must serve as a framework or guide for encouraging and facilitating actions by the business community.

Our Real Estate Dilemma

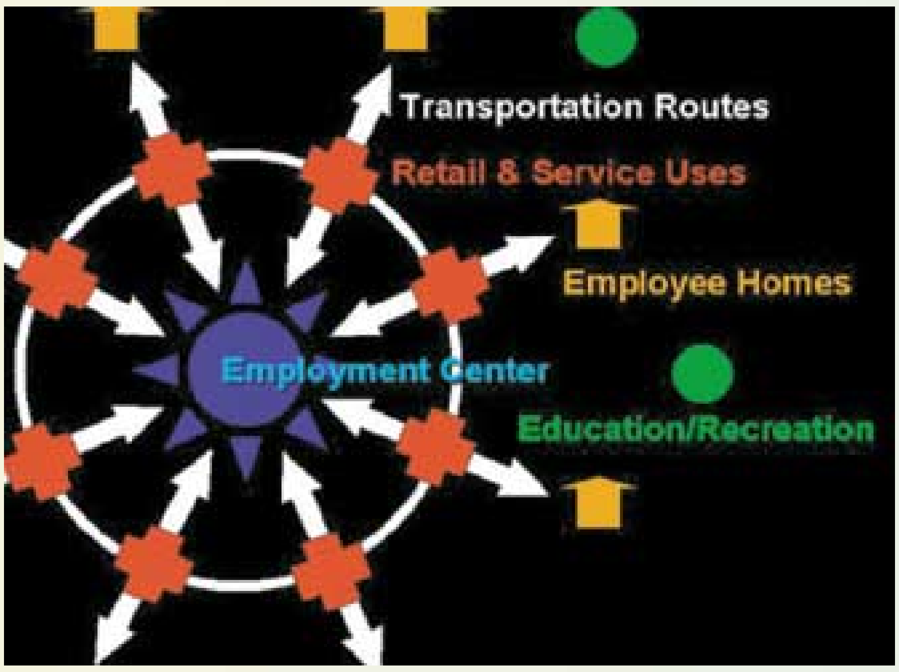
It is important to understand that all economic development and redevelopment actions are essentially real estate transactions. As such, they respond to the same factors that affect the real estate market in any specific location. Simply, the demand for and supply of a specific real estate product affects its value as a commodity.

Let's first discuss the typical relationships between various types of real estate using the graphic below.

The strongest land use relationship exists between employment centers providing jobs for the community and housing occupied by those who are employed. Ideally, the quality of jobs and corresponding wages within the employment centers continue to increase over time. That, in turn, permits an increase in the quality of housing and disposable income.

The strongest land use relationship exists between employment centers providing jobs for the community and housing occupied by those who are employed.

As demonstrated by the graphic, this relationship between employment and housing also provides the primary impetus for the establishment of retail and service businesses. Typically, the most desirable locations for these uses are either en route to or from home and work. Increased disposable income means better quality and higher priced goods for sale that, in turn, translate to higher wages for those who work in those retail and service businesses.



In addition, increased economic growth means more funding available for public services including schools, parks, libraries, and civic and cultural centers. These all tend to raise the quality of life for the residents of the entire community, both low-wage and high-wage earners alike.

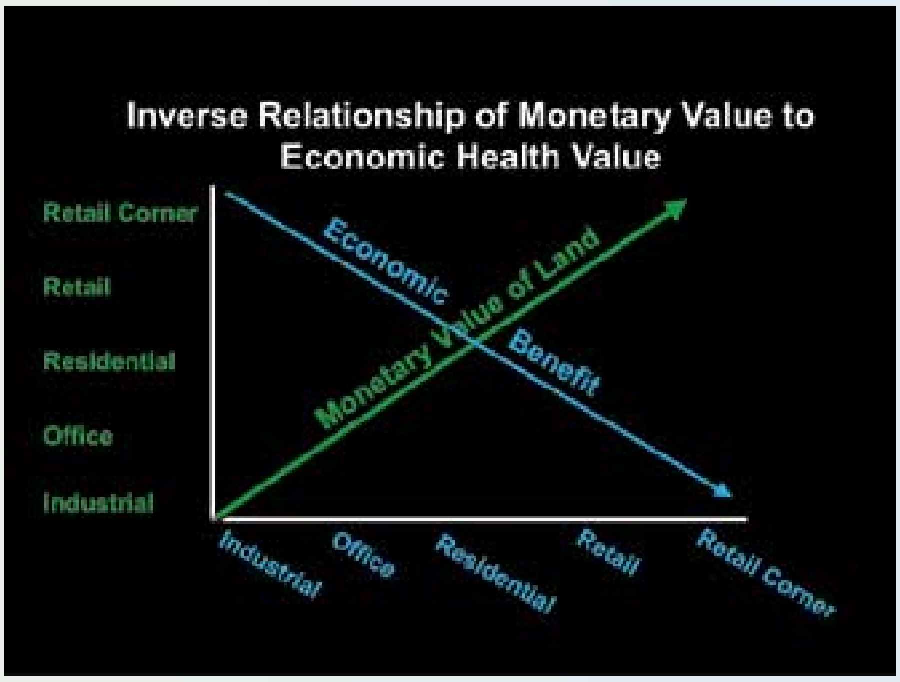
So what is our dilemma? *It is the fact that the monetary value of real estate is inversely related to its value to the economic health of a community.* The sale and purchase of real estate is driven by the principle of "highest and best use." Simply stated, this means that the highest and best use for any piece of real estate is that which produces the greatest financial return to its seller. However, determining highest and best use relative to Pinellas County's future is much more complex. Market forces are driving landowners to position their property for higher monetary value (i.e., retail) while the highest economic value to the community lies in its use by new or expanding primary employers.

The monetary value of real estate is inversely related to its value to the economic health of a community.

In addition to an owner receiving a reasonable financial return for the sale of real estate, several other factors must be weighed in evaluating the benefit to the county including:

- Value as a primary job generator
- Value as a catalyst for secondary jobs
- Value as a taxable ratable
- Value as a locational opportunity (the importance of a particular property considering its proximity to other uses and transportation systems)

The inverse relationship of real estate value to economic health value is demonstrated by the following graphic.



The monetary value of real estate within the county follows a pattern typical of most similarly urbanized areas throughout the United States. As shown by the upward green line in the graphic, the most expensive real estate is typically the retail corner, capable of accommodating specialized uses such as pharmacies and gas stations. Values diminish as the potential use changes from retail to residential then to office. Typically, at the bottom of the land value scale within an urbanized environment is land suitable for industrial uses.

The downward blue line in the graphic illustrates the relative economic value of the same types of land uses. Properties suitable for industrial and office uses are the most valuable from an economic health perspective. These are the uses that contain most of the primary employers who generate the highest wages.

Our Shrinking Property Base for Primary Employers

Land currently planned or zoned to accommodate primary employers is disappearing at a high rate within Pinellas County. This is principally occurring through local government actions (comprehensive plan or zoning amendments) requested by property owners attempting to increase the monetary value of their land.

Land currently planned or zoned to accommodate primary employers is disappearing at a high rate.

During the last five years, the pressure on business use properties (Industrial Limited (IL), Industrial General (IG), and Residential/Office General (R/OG) land uses) within the county to be converted to more lucrative uses has increased. A total of 31 comprehensive plan land use changes have been granted for existing business use properties to be converted to commercial or residential uses. Only two requests have been approved converting commercial uses to business uses. *This equates to a net loss of 177 acres of land suitable for primary employers.*

Arguments in support of comprehensive plan and zoning amendments typically include that the change would mean less impact, be less intense, produce less traffic, be less dense, and most importantly, be less objectionable to the local residents.

Superficially, these arguments seems very convincing. How could less impact be bad? *The problem is that the conversion of land suitable for primary employers to some other use also means fewer employment opportunities, less of a ratable tax base, less of a reason to want to live in Pinellas for employment opportunities, and less chance for the sustained economic health of and quality of life within the county.*

How Do We Plan for Economic Growth?

Notwithstanding the shrinking base of land designated for business uses, *we need to be ready to accommodate both the expansion of existing primary employers and the recruitment of targeted new ones.* If we are not competitive, these employers will be forced to move to vacant land (greenfields) outside of Pinellas County. Areas within central Pasco County, the I-4 corridor, New Tampa, Brandon, Lakeland, the Suncoast Parkway corridor, and the I-75 corridor are eager to accept our displaced primary employers.

Remaining competitive, however, does not mean the property costs with Pinellas County must necessarily be equal to or less costly than greenfields prices.

Pinellas is truly a *Community of Quality Communities*. Because of this, we have the ability to maintain and recruit certain employers who may pay slightly more to benefit from the quality of life offered here.

What Primary Employers Require

In addition to the superior quality of life offered by the county, numerous other elements must be in place for primary employers to choose Pinellas. Some of these elements are shown in the following graphic.

Most importantly, what existing or new primary employers require is real estate suitable for their business use. Within Pinellas County, these opportunities primarily occur by:

- Developing remaining vacant land
- Developing grayfields or other scrapable sites
- Retrofitting obsolescent buildings and eliminating site design inefficiencies

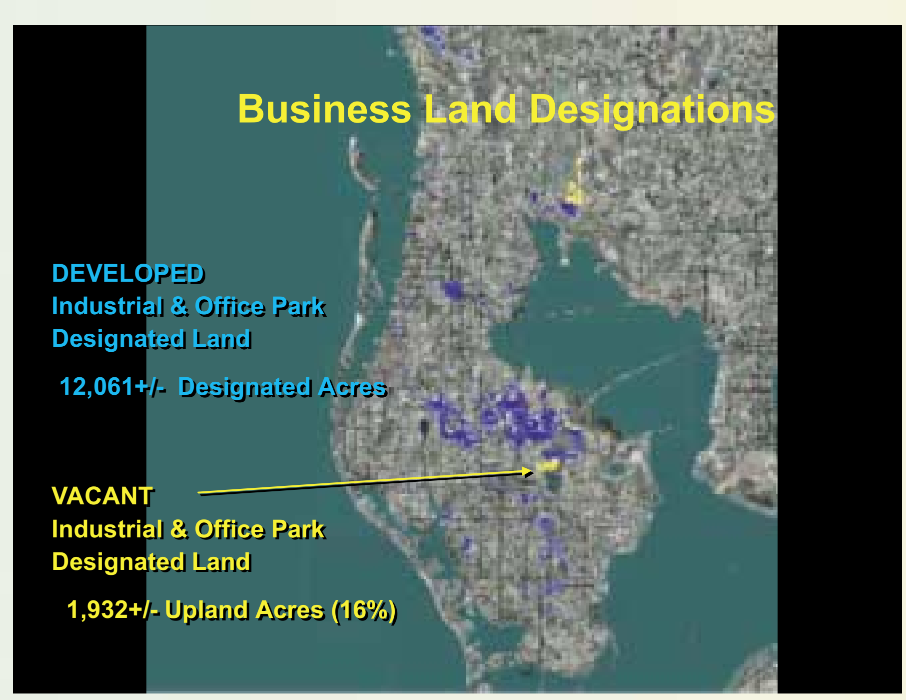
What existing or new primary employers require is real estate suitable for their business use.

Vacant Land Opportunities

There are approximately 14,000 acres of land within Pinellas County designated for business use (IL, IG, or R/OG) suitable for primary employers. Of that number, +/-12,000 acres (86%) of these properties are currently developed. The remaining acreage (+/-2,000 acres or 14%) are mostly vacant or contain no buildings of significant taxable value. If we apply a reasonable building floor area ratio (FAR) of 25 percent to this undeveloped real estate, we could expect to be able to accommodate an additional 21.8 million square feet of business uses. However, the real estate forces that have caused many of these properties to remain undeveloped are likely to continue into the near future. Many of them are located within major planned business parks that had to undergo the rigorous and costly Development of Regional Impact (DRI) review process. Exactions tied to that process, along with landowner high expectations due to the time and risk they endured during the DRI process, cause most of these properties to be priced "above the market."

Grayfields and Scrapable Sites

A second opportunity for locating expanding or new primary employers comes in the form of redeveloping vacated business properties (grayfields) or locating functionally obsolescent business properties (scrapable sites) and demolishing the structures and clearing the land.



It is generally recognized that structures capable of housing primary employers have an effective life of approximately 30 years, and rarely greater than 40 years.

The following picture of the Clearwater Industrial Park illustrates the aging of structures within the park. This aging pattern is typical of most business parks within the county. It is generally recognized that structures capable of housing primary employers have an effective life of approximately 30 years (red squares), and rarely greater than 40 years (black squares). This is due to both the natural deterioration that occurs over time and the functional obsolescence brought about by the evolution of industry. Building clear height, column span, power demands, insulation requirements and security needs are some of the factors that affect suitability of an existing structure for it re-use by a newer industry. If it is not economically feasible to upgrade or retrofit these structures, and it generally is not, then we can be looking toward the total redevelopment of aging properties.

The table below illustrates that of the 37.4 million square feet of existing business uses within the county, 6.2 million square feet (16.6%) are, or are likely approaching functional obsolescence. This equates to almost 700 acres of land available for primary employer redevelopment opportunities.


Redevelopment Opportunities

	Building SF	Land Acres
Over 40 Years	3,300,000	356
	6.2 mil. SF	691 Ac.
30 - 40 Years	2,900,000	335
20 - 30 Years	7,200,000	869
10 - 20 Years	16,000,000	1,750
Under 10 Years	8,000,000	895

Retrofitting Obsolescent Buildings & Eliminating Site Design Inefficiencies

A significant amount of increased primary employment opportunity is available through retrofitting existing structures in combination with more efficient use of land surrounding them. The graphic below illustrates how eliminating these inefficiencies could result in an opportunity for almost 11 million square feet of additional primary employer space.


Unused Business Capacity
IL, IG and R/OG lands are
Significantly Under Developed

FLUM	Developed Acres	Existing SF	Permitted SF	Unused SF
R/OG non-residential	919	15.0 mil. (.375 FAR)	- same -	- NA -
IL	2,792	22.9 mil. (.189 FAR)	32.8 mil. (.27 FAR)	9.9 mil.
IG	403	3.1 mil. (.180 FAR)	4.1 mil. (.23 FAR)	1.0 mil.
				10.9 mil.

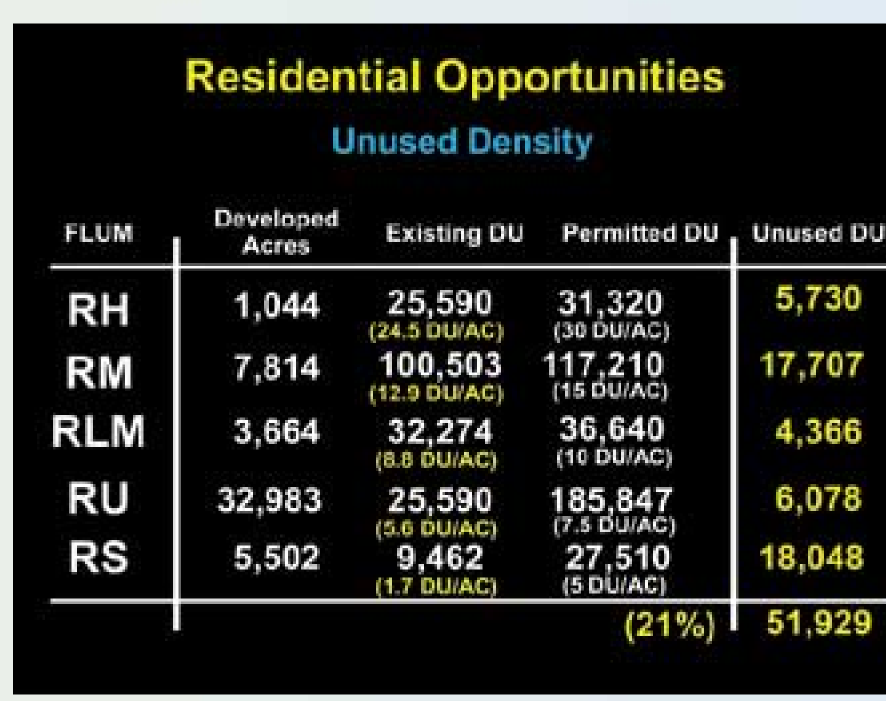
Only land within the three main primary employer land use categories was analyzed. Also, only developed acreage used for business was considered. In the case of the R/OG land use category, the 919 acres represent only real estate currently developed for business uses.

By calculating the current building FAR for each land use category and comparing those FARs to industry standards, one can estimate the approximate unused capacity for those properties. The analysis shows that for both the IL and IG land use categories, FARs within Pinellas County are significantly below reasonable efficiency. By applying reasonable FARs to this same acreage, it can be estimated that infill, intensification, or redevelopment of these existing properties could produce approximately 10 million square feet of IL and approximately 1 million square feet of IG business space opportunities for primary employers.

Analysis shows that for the IL and IG land use categories, FARs in Pinellas County are significantly below reasonable efficiency.

Residential Development Opportunities

Most of Pinellas County is developed at residential densities significantly lower than that allowed by the *Countywide Comprehensive Plan*. This is particularly true in land use categories that permit maximum densities of 5.0 units per acre or greater. The graphic below illustrates the current densities achieved within the five highest residential density categories.


Residential Opportunities
Unused Density

FLUM	Developed Acres	Existing DU	Permitted DU	Unused DU
RH	1,044	25,590 (24.5 DU/AC)	31,320 (30 DU/AC)	5,730
RM	7,814	100,503 (12.9 DU/AC)	117,210 (15 DU/AC)	17,707
RLM	3,664	32,274 (8.8 DU/AC)	36,640 (10 DU/AC)	4,366
RU	32,983	25,590 (5.6 DU/AC)	185,847 (7.5 DU/AC)	6,078
RS	5,502	9,462 (1.7 DU/AC)	27,510 (5 DU/AC)	18,048
			(21%)	51,929

The following summarizes the relationship between the achieved densities within each of the five categories compared to the permitted densities:

Land Use Category	Permitted Density (DU/Ac)	Achieved Density (DU/Ac)	% of Permitted Density
Res. High	30	24.5	82%
Res. Medium	15	12.9	86%
Res. Low Medium	10	8.8	88%
Res. Urban	7.5	5.6	75%
Res. Low	5	1.7	34%

A theoretical maximum residential buildout under the current comprehensive plan would allow for an additional 52,000 units. Although maximum buildout is neither practical nor likely desirable, it does show that flexibility exists within current future land use plans to increase housing by an additional +/-21 percent.

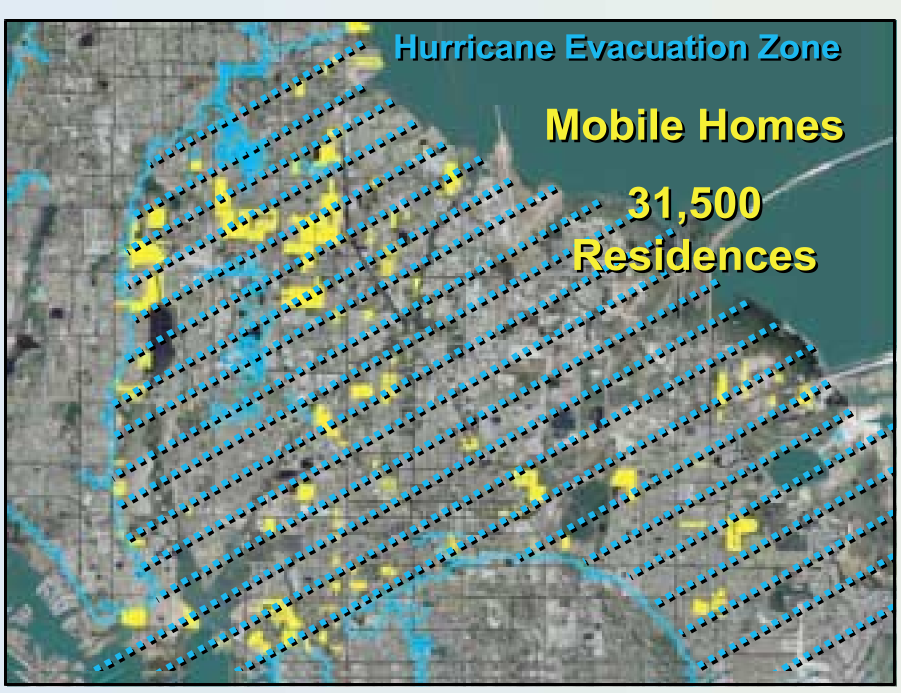
Through density transfers to appropriately located residential high-density nodes, the opportunity exists to provide incentives that would make redevelopment of existing deteriorating housing stock economically feasible.

The Mobile Home Dilemma

County mobile home parks currently contain over 50,000 dwelling units and occupy over 5,000 acres. Seventy-four percent or 37,400 of these units are located within parks controlled by a single owner. This represents almost 3,800 acres of real estate.

Although it is often considered that mobile homes are the least desirable form of housing within a community, they do fulfill an important need in providing low cost housing. In addition, ownership of mobile home parks is currently one of the most lucrative forms of real estate ownership due to very low overhead and a consistent cash flow.

The evolutionary location of mobile home parks within the county has caused the majority of them to be located within central Pinellas. This is primarily due to the relatively low cost of real estate in the predominantly industrial area in combination with the historic period when central county was developing. Not coincidentally, many of the parks are also located on land most susceptible to tropical storm and hurricane damage. The graphic below illustrates that more than 63 percent of all mobile homes within the county are located within hurricane evacuation zones. This represents 31,500 mobile homes located on 3,310 acres.



It is significant to note that many of these existing mobile home parks are located in or adjacent to business parks which provides additional opportunities for primary employer accommodation.

Similar to mobile home parks, recreational vehicle parks and land currently used by landscape growers represent opportunities for residential infill. The county currently contains 54 recreational vehicle parks occupying over 390 acres. In addition, there are over 200 growers occupying real estate totaling over 270 acres.

Central Business District and Community Redevelopment District Opportunities

Pinellas County currently contains almost 2,000 acres designated within comprehensive plans as Central Business District (CBD) or Community Redevelopment District (CRD). These designations typically encourage higher density/intensity and mixed use (residential/commercial combinations) projects. An analysis of land utilization with the CBDs and CRDs shows that except for some isolated cases, these more intense and more integrated uses are not occurring.

The following table illustrates that only in the St. Petersburg CBD are commercial intensities exceeding a building FAR of 1.0. The next closest intensity is within the Clearwater CBD with a FAR of only 0.488. CRDs have a particularly low commercial FAR averaging only 0.243.

CBD & CRD Opportunities

			Commercial			Residential		
Location	Type	Devel. Acres	Square Feet	Devel. Acres	FAR	Units	Devel. Acres	DU/AC
Largo	CRD	274.7 Ac.	1,364,121 SF	182.5 Ac.	0.172	733 DU	92.2 Ac.	8.0
Pinellas Park	CRD	614.8 Ac.	4,009,346 SF	468.8 Ac.	0.196	914 DU	146.0 Ac.	6.3
Gulfport	CRD	50.9 Ac.	123,470 SF	23.4 Ac.	0.121	325 DU	27.5 Ac.	11.8
St. Petersburg	CRD	124.4 Ac.	1,462,215 SF	89.2 Ac.	0.376	609 DU	35.2 Ac.	17.3
Clearwater Bch.	CRD	129.9 Ac.	2,282,722 SF	116.3 Ac.	0.451	297 DU	13.6 Ac.	21.8
Dunedin	CRD	118.5 Ac.	998,410 SF	77.4 Ac.	0.296	343 DU	41.1 Ac.	8.3
Oldsmar	CRD	69.3 Ac.	194,014 SF	29.1 Ac.	0.153	202 DU	40.2 Ac.	5.0
		1,382.5 Ac.	**10,434,298 SF**	**986.7 Ac.**	**0.243**	**3,423 DU**	**395.8 Ac.**	**8.6**
Clearwater	CBD	240.5 Ac.	4,523,013 SF	212.7 Ac.	0.488	216 DU	27.8 Ac.	7.8
Safety Harbor	CBD	86.5 Ac.	374,168 SF	47.1 Ac.	0.182	268 DU	39.4 Ac.	6.8
St. Petersburg	CBD	253.3 Ac.	10,787,451 SF	227.8 Ac.	1.087	727 DU	25.5 Ac.	28.5
		580.3 Ac.	**15,684,632 SF**	**487.6 Ac.**	**0.738**	**1,211 DU**	**92.7 Ac.**	**13.1**
COMBINED		**1,962.8 Ac.**	**26,118,930 SF**	**1,474.3 Ac.**	**0.407**	**4,634 DU**	**488.5 Ac.**	**9.5**

Residential densities are also extremely low within most CBDs and CRDs. If we exclude St. Petersburg, residential densities within these districts are less than 7.5 units per acre. Gross densities in excess of 15 units per acre and net densities as high as 30 units per acre are the traditional goals for achieving critical mass within a downtown area.

Gross densities in excess of 15 units per acre and net densities as high as 30 units per acre are the traditional goals for achieving critical mass within a downtown.

Pinellas GIS Data Base

An extensive Geographic Information System (GIS) data base has been established for Pinellas County. GIS is a system of computer hardware and software used for storage, retrieval, mapping, and analysis of geographic data. Spatial features are stored in a coordinate system (latitude/longitude, state plane, etc.), which references a particular place on the earth. Descriptive attributes of the features are provided in table form and are linked with the mapped features. These features and associated attributes can then be layered together for mapping and analysis. Spatial data can be "re-projected" from one coordinate system into another, thus data from various sources can be brought together into a common database and integrated using GIS software. Boundaries of spatial features "register" or align properly when re-projected into the same coordinate system.

Five principal types of spatial data were collected for Pinellas County: 1. demographic; 2. transportation; 3. land systems; 4. geopolitical; and 5. ownership. Sources of this data were federal, state, regional, county, and private agencies.

Demographic data primarily was derived from the 2000 Census with growth estimates interpolated from various commercial demographic projection services.

Transportation data came from FDOT, Pinellas County, and the Tampa Bay Regional Planning Council. Land systems data, which describes the physical characteristics of the county, was input from the University of Florida, Southwest Florida Water Management District, FEMA, US Soil Conservation Service, county, state, and federal sources. Geopolitical spatial data came primarily from the federal government, State of Florida, and Pinellas County. Ownership information was provided directly from the Pinellas County Property Appraiser's Office.

The validity and usefulness of GIS data is highly dependent upon its current accuracy. Certain mapped spatial features, such as physical features (i.e., topography, drainage basins, wetlands, etc.) tend to change slowly, however, geopolitical features and attributes (i.e., property ownership, values, occupancy, etc.) change continuously. Care, therefore, must be used in depending upon GIS data base information relative to its age.

Four examples of GIS composite mapping for Pinellas County follow this section. They include a summary of data concerning: 1. land features; 2. housing; 3. transportation; and 4. employment.

Thinking Ahead

As we prepare to move forward with creation of the *Economic Development/Redevelopment Plan for the Pinellas Community*, we must recognize the importance of providing incentives for development types and intensities that we desire. Key to the effective use of any incentive is to guarantee that it is available for application to the use or business desired.

What is evident is that we have the land area (over 6,000 acres) capable of accommodating business redevelopment exceeding 87 million square feet and residential redevelopment approaching 100,000 new units.

Far too often development incentives are applied to pieces of real estate as opposed to specific targeted uses. The result of this strategy is often the immediate inflation of real estate value by the landowner, thereby negating any significant incentive to the end user. Our economic development/redevelopment planning strategies must protect our incentives so that they are received by those we target.

Real Estate Opportunities Summary

Our analysis has shown that although Pinellas County is approaching physical buildout, many opportunities for redevelopment, infill, and intensification exist. The following table summarizes three major opportunity areas of vacant land, underutilized real estate, and scrapable or redevelopment sites.

Real Estate Opportunities Summary

VACANT OR INAPPROP. USE LAND	Acres	Bus. SF. million	Bus. Jobs	Residential Units
Business (Ind./Off.)	1,440	16.3	54,400	-NA-
Mobile Homes (In H. Evac.)	3,310	7.5	25,000	31,800
RV/Nurseries/Other	664	-NA-	-NA-	8,000
Total	5,414	23.8	79,400	39,800
UNDER USED LAND				
Business (Ind./Off.)	-NA-	30.3	101,000	-NA-
Residential	-NA-	-NA-	-NA-	52,000
CRD/CBD Areas	-NA-	25.2	84,200	5,200
Total	-NA-	55.5	185,200	57,200
SCRAPABLE LAND				
Business (Ind./Off.)	691	7.8	26,000	-NA-
GRAND TOTAL	6,105	87	290,600	97,000

Jordan Park, St. Petersburg

Urban Design

Introduction

The fundamental structure of any community is defined by three critical locations – places where people live; places where they work; and places where they play. Equally critical to the locations are the means by which people move between them. These *movement systems* typically comprise the network of roads that serves as the functional skeleton for the community. While all communities include these location types and a system of movement, they can vary enormously in both the organization of places and the organization and types of mobility. For example, Boston, Massachusetts; Tysons Corner, Virginia; and Pinellas County all include a diverse range of housing types, a wide variety of employment centers, and the full complement of places for leisure pursuits, including stores, shops, parks, playgrounds, places of worship, civic buildings, theaters, arenas, and so forth. There is nothing unique among the three communities when it comes to the fundamental elements.

Top and Bottom - Maderia Beach

And, yet, the three places cannot be more different. Boston is a pre-automobile community that started as a small waterfront village located on the tip of a protected peninsula and gradually, over the course of three hundred years, expanded to become a city of 600,000 in a metro area of 1.5 million. Tysons Corner barely existed forty years ago; it has since grown to be a key component of the massive Washington, D.C. metro area, with densities that far exceed those found here. Pinellas County, like Boston, sits on a peninsula, but exists as a collection of small and medium size settlements from the early part of the 20th century that gradually grew together during the massive influx of residents during the post-World War II boom.

Pinellas County is an example of post-war residential suburbia.

Boston is a example of a pre-automobile urban city with a diverse and balanced transportation system. Tysons Corner is an example of a post-war "edge city" that is automobile dominated, but increasingly includes a range of transportation types. Pinellas County is an example of post-war residential suburbia that has run out of room to expand and is slowly looking to densify and become more diverse. It is almost completely auto-centric.

If Pinellas epitomizes the post-World War II suburban expansionism that dominated America, it also points out some of the weaknesses of this form of growth. What appeared fresh and new in the 1950s and 1960s is now generally regarded as tired, outmoded, and functionally obsolete. In 2000, analysts from Pricewaterhouse-Coopers commented on the overall condition of America's suburbs:

> In the U.S., it is clear that there is a trend toward suburban degeneration. The suburb's dependence on the car, its shoddy infrastructure, poor or non-existent regional planning and unremitting construction has created ugly, expansive suburban landscapes with deteriorating prospects for the future. It has generally been accepted that America's once coveted suburban lifestyle is now under stress.

Examples of such stress are relatively easy to find within Pinellas County. The beach communities, once the key destination on Florida's Gulf Coast, now appear, to many, to be tacky, over-grown, and old-fashioned. Gulf Boulevard, the spine of the beach communities, looks no different than suburban arterial strips all over the country, and in many areas, it actually looks worse. U.S. 19, the major north-south arterial in the county, epitomizes the post-war commercial strip, and the dozens of subdivisions, trailer parks, and strip shopping centers that were constructed in the thirty years after World War II, are all now in varying stages of decline.

Bayshore Blvd., Safety Harbor

On the other hand, the county still has enormous natural beauty and many neighborhoods and districts that are vibrant and aesthetically pleasing. Blessed with over 400 miles of waterfront (not including freshwater lakes) that incorporates almost every conceivable condition, the county features spectacular sunsets, phenomenal boating, and other water sports.

While it is relatively dense, particularly by comparison to the rest of the state, the county is not urban.

Currently, the county faces a condition of near buildout. However, the key issue confronting the county as it looks forward, is the fact that while it is relatively dense, particularly by comparison to the rest of the state, it is not urban. Thus, given that the county can no longer grow outward, it must focus on growing inwards and upwards; in short, the county must focus on becoming more urban.

How to Become Urban

Pinellas County has nearly one million residents, rather tightly packed onto a land mass of 280 square miles. By both measures, number and density, it can be called urban. However, the condition of urbanity as used in this discussion does not relate to the statistical analyses that are often used by demographers, sociologists, and political analysts. It is not primarily concerned with the size of a population, or even with the overall density of development. Rather, the state of urbanity that should become the goal for Pinellas County, reflects a particular structure and organization for the community as a whole.

US 19 at Lake Tarpon

Using these criteria, one can describe Chicago as a city that is both big and quite urban. Houston, on the other hand, is big, but not urban. Boston is a community that is dense, and urban. Los Angeles is dense, but only sporadically urban.

Key structural distinctions separate an urban environment from one that might be called suburban. An urban environment has integrated uses; a suburban environment tends to separate uses by function. An urban environment tends to incorporate many relatively small-scale developments; a suburban environment tends to include larger-scale developments, particularly in terms of land area. Mobility in an urban environment is multi-modal; in a suburban environment it is almost entirely auto-dominated. The street system in an urban environment is almost always an integrated network that provides enormous variety and adaptability. In a suburban environment, the system tends to be a hierarchy that is prone to overload and breakdown. The overall physical form of an urban environment tends to be focused, with clear nodes and centers; a suburban environment is much more dispersed.

The challenge in moving from a suburban to a more urban pattern is to concentrate all the diverse elements of community development and redevelopment. Fundamentally, there are four such elements: the natural environment, the built environment, the social/community environment, and the financial/economic environment. No one of these four should receive too much priority. Nor can any one of them be neglected. It does a community no lasting good to sacrifice its environmental assets in order to build more buildings. Nor does it do any good to build inferior quality structures in order to raise the tax base or bring in more revenue. Similarly, it does no good to build houses and stores, if they don't substantially enhance the social and community quality of life. These issues are particularly pertinent when the objective is to redevelop as opposed to starting from scratch. In redevelopment, the existing environment acts as a benchmark for quality and improvement.

Each decision should be tested against the simple question: will this change improve the natural, physical, social, and economic condition of the community as a whole?

Successful urbanism lies in an approach to development and redevelopment that includes a mix, mass, and mesh of uses.

The key to successful urbanism lies in a three-part approach to development and redevelopment. First, it is critical that each project, neighborhood, community, and city, have the requisite *mix* of uses – fundamentally, places to live, work, and play. However, it is also critical that each project include the right proportions of each type of use; that is, the appropriate *mass* of uses.

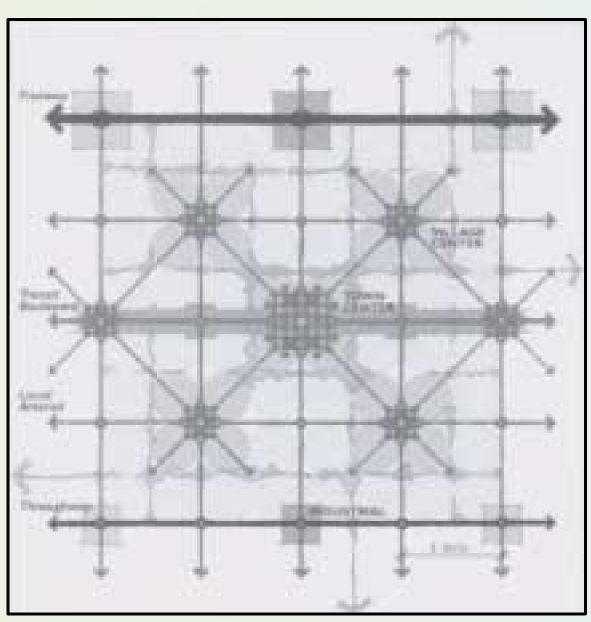
Finally, and this is where urban design becomes a critical issue, and city building moves beyond simple planning and regulations, it is imperative that uses exist within desired physical interrelationships. That is, they must *mesh*.

Again, all three elements are necessary for successful urbanism and communities. One needs the right *mix* of uses; there must be an appropriate *mass* of each use; and they all must *mesh* together effectively. Omitting any one of the three elements destroys the potential for creating a successful urban environment.

Two Paradigms

In looking at ways to both analyze and promote the redevelopment of Pinellas County, two paradigms are provide gudiance. In the spring of 2002, Peter Calthorpe, a well-known urban designer and town planner from California, presented *The Urban Framework*, a regional organizing structure built around a variable network of movement systems, neighborhoods, and districts. The goal of the framework is to facilitate the functional flexibility and capacity of an integrated network of streets and roads, but to avoid the homogeneity so often found in suburban and exurban development.

Regional Organizing Structure



On the east coast, Andres Duany, based in Miami, has been promoting the Urban Transect which he contrasts with the Natural Transect popularized by the ecologist and landscape architect Ian MacHarg, in his seminal 1969 publication *Design with Nature*. In the Urban Transect, Duany argues for clear delineation of different areas within the city or community, from most to least dense. He calls each of these areas an "element" of the Transect, and ranks them from T1-Rural Preserve, which is land that will remain permanently open, to T6- Urban Core, which is the heart of major cities.

Urban Transect

An Analysis of Pinellas Patterns of Development

In studying both the history of development within the county and the current conditions, it becomes clear that development patterns from three different chronological periods dominate. The first of these periods covers development that occurred up to and during the 1930s (Pre-World War II). The second covers development during the period of explosive growth during the 1950s, '60s, and '70s (Post-World War II). The final period covers development within the past twenty to twenty-five years (Contemporary). In addition to relating to different time periods, the development patterns tend to relate to different locations within the county as well.

Crescent Lake Neighborhood

Pre-War development tends to be located in and around the oldest settlements – St. Petersburg, downtown Clearwater, Dunedin, Safety Harbor, and Tarpon Springs, with dominance in the southern sector of the county. The Post-War development tends to be located in the central part of the county, with dominance in Clearwater, Largo, and Pinellas Park. Finally, Contemporary development tends to be located in the northern sector of the county, particularly north of Ulmerton Road and in the East Lake area.

Pre-War Patterns of Development

The most cohesive and comprehensive examples of Pre-War development patterns are found in and around downtown St. Petersburg. While the downtown itself is extensively mixed-use and well-integrated, it was omitted from further analysis because of its unique place as the dominant urban center within the county. Rather, neighborhoods immediately surrounding the downtown were analyzed, both for their original, underlying urban structure, and for current conditions and examples of ongoing redevelopment.

In studying the neighborhoods, the gridded organizing structure of streets becomes evident. This reflects the intensely commercial attitude of the early city founders who looked to lay out pre-platted subdivisions that would be easy to access and efficient to sell and develop. A range of arterial roads, running east-west and north-south, are generally laid out on a half-mile or one-mile pattern.

Crescent Lake Neighborhood

The Crescent Lake neighborhood is located north of downtown St. Petersburg and is defined by its boundaries – between 9th and 22nd Avenues in the north-south direction, and between 4th and 9th Streets in the east-west direction. In addition, Crescent Lake is distinguished by its central feature – a crescent-shaped body of water ringed by a public park. Today, 4th Street serves as a major link to the downtown, particularly for vehicles from other parts of the county and from Tampa. The regional commercial character of this arterial declined significantly in the latter decades of the 20th century, but has begun to revive in the past several years. For example, an older two-story commercial structure at approximately 19th Avenue and 4th Street, which had been vacant for several years, was recently renovated, and now houses an Outback restaurant, a Panera Bread restaurant, and additional lease space. Just north of 9th Avenue, a similar building has been renovated and converted to a restaurant and lease space; a new Starbucks coffee shop has been built on an adjacent lot. The new building matches and reflects the traditional scale and street-front location of the older commercial buildings.

To the west, 9th Street reflects a mixed character with both neighborhood-scale commercial uses and residences. These small commercial uses tend to be in stand-alone buildings of a smaller size, and with larger setbacks than those along 4th Street.

Crescent Lake Neighborhood, Detail

In between the two north-south corridors, the plan of the neighborhood is essentially a grid, but one with disruptions and discontinuities that reflect both the presence of Crescent Lake Park, and the variety of builders and developers who first started the neighborhood. A wide variety of residential uses can be found, including many single-family houses encompassing a wide variety of architectural styles, a number of small neighborhood-scale apartment buildings (generally two or three stories with between four and twelve rental units), a number of which were originally single-family homes. Lots tend to be small by contemporary standards, with many falling between 50 and 70 feet in width; they range from tiny (less than 3,000 square feet) to medium-sized (half acre), and many units include garage apartments, often accessed from rear alleys. Neighborhood streets tend to be relatively narrow, although many are wide enough to allow on-street parking on both sides of the street. While not every block in the neighborhood includes alleyways, the majority does, which helps coordinate the appearance of the major fronting streets because they are not interrupted by driveway curb cuts.

Post-War Development

As noted, the predominant examples of Post-World War II development occur around the center of the county, particularly in Clearwater, Largo, and Pinellas Park. For analysis, suburban Clearwater was studied, particularly the areas served by Gulf-to-Bay Boulevard, the dominant east-west artery leading into and out of Clearwater. The general area map indicates the continuity of a gridded pattern of streets.

Central Clearwater

The focus of the study area was a rectangle defined by Gulf-to-Bay Boulevard on the north, Lake Avenue on the west, Nursery Road on the south, and Belcher Road on the east. The dominant street pattern in this area is a rectilinear grid; the orientation of the blocks varies from north-south to east-west within various parts of the area. The dominant land use is residential, in particular single-family. In contrast to the Pre-War example, the typical dwelling is a one-story ranch house, generally oriented with the long face parallel to the street. This produces lots that range in width from 70 to over 100 feet. There are few alleyways; most dwellings are accessed from the fronting street. A modest amount of multifamily units are found in the area. These tend to be apartment buildings, most of which are two stories in height. There is one mobile home park, located along Gulf-to-Bay Boulevard, at the southwest corner of the intersection with Belcher Road.

Central Clearwater

The area includes three schools: Plumb Elementary, Oak Grove Middle, and Clearwater High. There is an extensive park system that wends through the center of the study area and includes formal and informal play areas, as well as ecological areas. At the center of the area sits an historic cemetery.

Retail uses are found along Gulf-to-Bay Boulevard, and clustered around the intersection of Belcher and Nursery roads. The latter are true neighborhood-serving uses; the former tend to be smaller-scale uses because of the shallow depth of lots along Gulf-to-Bay, and they tend to be oriented towards a regional audience delivered by the roadway.

Central Clearwater, Detail

Contemporary Development

The study area for the analysis of the most recent forms of development falls in the East Lake area surrounding the intersection of East Lake Road and Tampa Road. These two roads provide the dominant east-west and north-south mobility for this area, and exemplify suburban arterial roadways. They include between four and eight lanes of traffic, are generally divided by a central median, and have rights-of-way that are often over 100 feet in width.

East Lake

The general study area includes extensive wetlands and natural preserved lands to the east, close to the border with Hillsborough County, as well as the Lake Tarpon Outfall Canal running north-south near its western border.

Land uses within the area are quite diverse, including residential, commercial, retail, and open space. The uses, however, tend to be highly segregated from each other, clustered into distinct retail shopping centers, apartment complexes, gated subdivisions, and small commercial office clusters.

East Lake

The defining elements of this area include the diversity of uses, the minimal physical connectivity between them, and the lack of integration within clusters. Residential areas tend to be further stratified by income level and economic bracket. The uses within East Lake tend to be relatively new, and there appears to be the potential for a limited amount of additional greenfield development.

East Lake, Detail

In the two previous examples, the dominant arterial roads act as "seams," linking the residential and commercial areas on either side. In the East Lake area, however, East Lake Road and Tampa Road tend to act as barriers rather than seams. Very few pedestrians were observed along these roadways, with only one or two instances of someone crossing from one side to another.

Comparison of Development Patterns

The areas for the three case studies varied from 0.85 square miles (Pre-War), to approximately one square mile (Contemporary), to just over 1.5 square miles (Post-War). All three tended to be dominated by residential development, with the Post-War case being the most extreme in this respect. All, however, included a mix of other commercial, retail, and civic uses.

The *Pre-War Study Area* displays the following characteristics:
- It includes a diverse mix of uses.
- Development is generally small-scale with neighborhood and local-area focus.
- Residential is the single dominant use.
- There is a significant mass of non-residential uses.
- There are few specific employment uses.
- The mesh of uses is very fine-grained.

The redevelopment opportunity here is to reinforce existing patterns.

Additional comments:
- Redevelopment is already well underway.
- Significant opportunities for additional redevelopment exist, particularly on 4th and 9th Streets.
- Create increasing diversity of uses, including employment.
- Urban character will strengthen over time.

The *Post-War Study Area* includes the following characteristics:
- There is a generally diverse mix of uses.
- There is neighborhood-focus commercial as well as some regional uses.
- The area includes three schools.
- Residential uses form the dominant mass of uses; overwhelmingly single-family residential.
- There are few specific employment uses.
- The mix of uses is of a somewhat coarser grain than the previous examples.

The redevelopment opportunity is to revitalize some of the original uses that are beginning to become marginal.

Additional comments:
- Redevelopment is not quite necessary, yet.
- Redevelopment of Gulf-to-Bay Blvd. is stymied by shallow lots.
- The potential transit system creates enormous opportunities, particularly for denser multifamily and commercial/office uses.
- The urban character should strengthen over time.

The *Contemporary Study Area* includes the following characteristics:
- There is a generally diverse mix of uses.
- This includes neighborhood-focus commercial as well as some regional focus.
- There is a significant mass of residential uses; this includes single-family as well as multifamily.
- Outside of some small-scale office developments, there are few specific employment uses.
- There is very little mesh of uses.

The redevelopment opportunity is to redirect future development into a more integrated and mixed pattern.

Additional comments:
- New development is still occuring.
- Future redevelopment will be difficult due to size and mono-functional character of current development.
- Density and diversity increases will be difficult .
- This area will always have a dominant suburban character.

Urban Design Opportunities for Pinellas County

Opportunity One - *Develop true urban nodes and centers at key locations throughout the county.*

Urban nodes and centers:
- Create variety within the overall urban structure, supporting the transect from urban to suburban.
- Re-validate the historical development patterns of the county.
- Help individual communities create their own distinct identities as places to live, work, and visit.

A true urban node or center is a location that displays all the elements of good urbanism:
- It is compact.
- It is mixed use.
- It is integrated, both vertically and horizontally.
- It is pedestrian-friendly.
- It is active.
- It is delightful for any and all who might be there.

The key to developing great urban places is the design of great streets, and the fundamentals of a great street are at once, simple and universal.

A great street needs to be bounded on both sides by continuous building walls that exist in a relatively narrow ratio with the width of the street. A 1:2 or 1:1 ratio of width to height is ideal, but a ratio as low as 4:1 or even 6:1 can work, if the street is detailed properly.

The buildings must be active and transparent at the ground level. They need windows for looking in (and out) and doors for entering and exiting. Retail shops, restaurants, and other active uses are ideal.

The space between the building and the street must be wide enough to accommodate at least three distinct zones:
- Closest to the building is a zone for idling and relaxing – for example, window shopping or sipping coffee at an outdoor table.
- Closest to the street is a zone for street trees and other forms of landscaping, as well as lamp posts, benches and other forms of street furniture. It is a buffer between cars and people, an aesthetic addition to the beauty of the scene, a useful place to store bicycles or buy a newspaper.
- In between should be a clear zone wide enough to accommodate the general mass of daily traffic, but certainly wide enough for two people to stroll, without pressure, side-by-side.

Ideally, the street includes on-street parking. The cars create another layer of physical and psychic protection between the vehicles moving in the street, and the pedestrians and others using the sidewalk. They also provide much-needed parking spaces, and create a flow of activity as people park, walk to stores and shops, return and drive away, to be replaced by another user.

Great urbanism also establishes a *sense of place*. Part of this is accommodated by the aforementioned streets, including the architectural character of the buildings, the type and species of trees and shrubs used for landscaping, as well as the additional features of streetscaping.

Celebration, FL

Another part is accomplished by deliberate physical planning and urban design; the creation of focal points, the design of plazas and squares, the location of vistas, gateways, and key civic buildings. A sense of containment is crucial to an urban sense of place; a location in which one can be away from the direct flow of traffic, but at the same time, feel bounded by surrounding buildings and other urban elements.

The opportunities to create such nodes and places abound throughout the county. Already, such conditions exist in older centers such as downtown St. Petersburg, Dunedin, and Safety Harbor. Other communities with specific plans and programs to create a revitalized urban core include Largo, Pinellas Park, Oldsmar, Palm Harbor, Gulfport, and Tarpon Springs. Areas that have the fundamentals to create such locations include nearly all of the beach communities, in particular St. Pete Beach, Treasure Island, Madeira Beach, Redington Shores, and Indian Rocks Beach.

Opportunity Two - *Redevelop commercial arterial strips to enhance mobility and reinforce desirable neighborhood patterns.*

- The arterial paradox: how can a single roadway serve both as a high volume regional transportation route and a local shopping street.
- Older arterials seldom work for contemporary retail purposes. The lots are too shallow and parking is inconvenient.

Pinellas County is blessed with a dominant and extensive grid system of arterial roads that run in both a north-south and an east-west direction. Because of the effectiveness of this street-level system of mobility, a county of nearly one million people can function with only modest service from the interstate highway system. However, despite the relative effectiveness of the arterial grid for moving vehicles and people about the community, these same arterials often exemplify the worst elements of suburban sprawl and visual blight.

A fundamental paradox afflicts these primary roadways in Pinellas County as throughout the country. Simply put, arterial roads are being asked to perform two, diametrically opposed, functions: serve as a high volume regional transportation route for some percentage of the users, and as a local shopping street for other users. Often, the users change roles during the course of the day, or even during the course of a single trip. For some users, Gulf-to-Bay Boulevard's primary purpose is to enable them to get from their homes in western Clearwater to their jobs in Tampa's West Shore district as quickly and efficiently as possible. For other users, often on the road at the same time, the road's function is to facilitate half-a-dozen linked shopping trips for daily and weekly needs. The concerns and the driving patterns of the two users are distinct and different. However, the roadway is being asked to perform contradictory tasks.

Winter Park, FL

The land-uses fronting on the arterial and, often, the physical lots themselves, are ill-suited for both their location and the tenor of the times. The vast majority of arterials in Pinellas County, and elsewhere in the state and country, are zoned for commercial uses in general, and retail uses in particular. Often, these roads were zoned at a time when there was far less population and demand for services. Lots fronting older arterials are generally quite shallow; many of them have the same dimensions as the residential lots with which they share a block. A lot depth of 100 or 120 feet or even 150 feet is too small for effective retail use by today's standards. If a pre-existing structure sits on the site, it is allowed to remain as is, but the combination of public sector zones and codes and the conventions of private sector developers tend to minimize the utility of such lots for not much else other than fast-food drive-through restaurants, very small retail stores, and some forms of office or commercial development.

The solution to the problem lies in rethinking both the function of the arterial road system, and the interface between frontage lots and the neighboring lots that abut them. Rather than allowing mile after mile of commercial frontage to remain as continuous commercial and/or retail zoning, municipalities should designate the areas around significant intersections for such uses and re-zone other properties fronting the arterials for a range of non-commercial uses including: multifamily residential, live-work units, light office and/or industrial uses, civic uses, or open space.

In each of these zoning categories, model plans should be developed indicating not only the ideal dimensions for developable lots (in terms of both linear frontage and lot depth), but also a series of paradigms for resolving the interface between the street-front use and the residential uses behind them. In some instances, the new uses will need to extend for the full depth of the fronting block, into the neighborhoods. In other instances, the conventional symmetrical platting might have to be altered, with additional land allocated to the fronting use.

In every instance, however, the goals must be clear:

- Optimize the utility of the properties facing on the arterial roadways.
- Reduce the oversupply of retail zoning by limiting it to optimal locations along arterials.
- Where necessary, replat fronting properties, in order to allow them to function effectively in their designated uses.
- Establish procedures for creating appropriate buffering between fronting uses and neighborhood residential uses, as well as allowing effective transitions from neighborhood to arterials.

Opportunity Three - *Develop nodes and corridors along the proposed transit system.*

- These reinforce the rail system as a viable form of mobility.
- They create distinct sub-districts within the county where one can thrive without dependence on a personal car.

Like many communities throughout Florida and the country, Pinellas County has a long-range vision of creating a regional mass-transit system that will provide coverage for much, if not all, of the county. While specific details remain to be resolved, a generally accepted route for the system has been devised, including the location of potential stations. Working with the assumption that these will be the designated stops along the transit system, the county and affected municipalities should re-zone those locations for high-intensity mixed-use development.

A fundamental misconception about the purpose and utility of a mass transit system is that the primary goal is the movement of people. Equally important is the creation of a fixed locational hierarchy. Those areas designated as station stops become immensely valuable for development and redevelopment because they form a link in a transit chain that extends throughout the community.

The area extending from the station itself for 1/4 to 1/2 mile away should be designated as an urban node, as described in "Opportunity One," above. Within these areas of between 120 and 500 acres, a resident should be able to live and/or work comfortably without necessary recourse to a private automobile. Places to live, work, and recreate should all be within the inscribed circle around the stations.

Douglas Avenue, Dunedin

By designating the station areas for intense urban development, and ensuring that these areas are designed to the highest standards for urban living, the community benefits from the creation of additional urban centers, and the transit system benefits from a ready audience of riders all located within easy walking distance of the stations. Communities such as the Washington, D.C. metro area, and those around San Francisco, California and Portland, Oregon can serve as useful examples for this approach.

Opportunity Four - *Redevelop under-utilized grayfield retail property as mixed-use centers.*

- Evaluate the validity of sites as employment centers supporting desirable industry and commercial functions.
- Integrate sites with surrounding suburban development in order to act as a neighborhood focus.

In 1960, there were just over four square feet of retail space per person in the United States. By 1980, retail development had expanded to the point that there were 12 square feet of store space for every man, woman, and child in the country. Today, there are nearly 20 square feet of retail area per capita. In Florida, because of our significant tourist population, the number is nearly 27 square feet per full-time resident. Much of this area is redundant, superfluous, or functionally obsolete. Locations that had excellent accessibility along a four-lane arterial in 1968 have given way to locations on interstate exits or along eight-lane arterials. Facilities built in the 1970s look hopelessly antiquated when compared with nearby facilities built in the 1990s. The rise and meteoric fall of some traditional powers in the retail industry – Montgomery Wards, K-mart, Jacobsen's, among others – have added to the ranks of vacant or nearly empty shopping centers and malls.

There is probably too much land zoned for commercial development within Pinellas County, and too many stores and shops for the current population (even including tourists) to cover. Under-performing retail buildings and land represent a significant element in the expansion of redevelopment within the county.

A simple GIS analysis indicates significant amounts of older retail property within the community, most of it located along the aforementioned regional arterial roads. A non-scientific windshield survey along these roads backs up the assessment that stores and shops throughout the county are becoming ripe for redevelopment.


Cypress Point Shopping Center, Clearwater

In some instances, these might be locations that are simply in need of repositioning; that is, the locations are good for some retail use, just not the particular uses that are currently there. In many other instances, however, the utility of the location for retail has declined, but its utility for other uses may have increased. An arterial that no longer provides the requisite car trips or access to keep a regional mall alive, might be more than adequate to bring workers to an integrated employment center. Similarly, a location that no longer works for regional retail might be ideal for a modest amount of neighborhood retail and a range of multifamily housing.

A location that no longer works for regional retail might be ideal for a modest amount of neighborhood retail and housing.

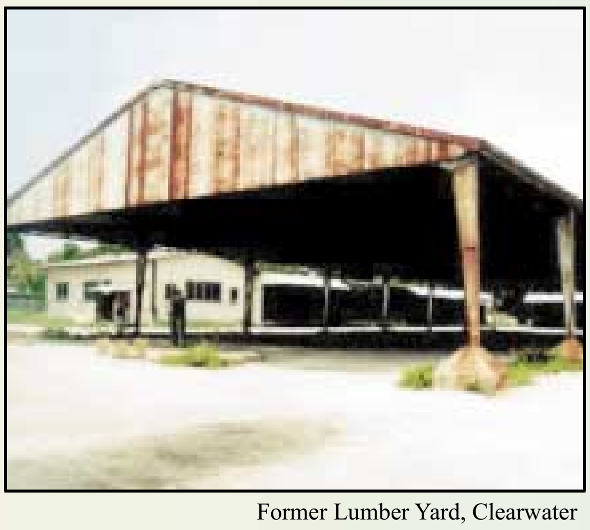
The biggest opportunity comes with sites ranging from 25 to 100 acres in size – a large-sized community shopping center to a full-sized super regional mall. At this scale, redevelopment can produce mixed-use urban centers that function as suburban downtowns. Two recent Florida examples highlight this potential. Mizner Park in Boca Raton was originally a 35-acre 500,000 square-foot double-anchor regional mall. Built in the early 1970s, it folded in the mid-1980s. With backing from the city and innovative financing, Crocker Development Company teamed with Cooper Carry Architects to redevelop the site as an open-air mixed-use center built around a 1,000-foot long grand boulevard. The ultimate build-out included retail space and restaurants, offices, condominiums, apartments, townhouses, department stores, museums, an amphitheater, and a multiplex cinema. The end product has been one of Crocker's most successful redevelopment projects, and has helped Mizner Park ascend to a status as town center that probably exceeds that of Boca's traditional downtown.

A second case study is Winter Park Village, the redevelopment of the original Winter Park Mall. Built on a 55-acre site in 1963, the mall closed in the mid-1990s. Redeveloped by the Costa Company from Sarasota with planning and design assistance from Dover Kohl & Associates, the "Village" is now back in operation with a range of retail, restaurant, and entertainment venues. The building from one of the original mall anchors has been retained and is being converted into loft apartments; ultimately, the perimeter of the project will be built-out with townhouses and other multifamily options.

Opportunity Five - *Seek optimal redevelopment of known and potential brownfield sites.*

- Remove existing and potential liabilities from within the community.
- Have significant potential to expand and embellish parks, open space, and recreational facilities.
- New regulations facilitate development of mixed-use centers.

Just as the aforementioned grayfield sites represent an enormous opportunity for redevelopment within the county, so, too, do known and potential brownfield sites. While the latter require considerably more work and effort to reclaim, numerous state and federal sources are available to assist in clean-up and reclamation. Currently, efforts are under way to locate and record all known and potential brownfields in the county. Even as this effort is on-going, however, parallel efforts should be looking at the opportunities to reuse these locations. In worst case scenarios, where future redevelopment will be significantly impacted by contamination that must be contained and encapsulated, the land can be reused for recreational or leisure-time uses. In other, less severe instances, the sites can function for myriad uses, including all manner and degree of redevelopment. Depending on their location, such "found" properties can play a critical role in providing additional lands for much-need employment centers and other job-creating uses.


Former Lumber Yard, Clearwater

Opportunity Six - *Even in very suburban locations, look to integrate mixed-use neighborhood centers into the residential fabric.*

- This helps eliminate the need for lengthy car trips for simple everyday needs.
- Integration helps diversify monofunctional residential districts and makes them more "kid friendly." This helps make suburban locations transit-ready and supports bus rapid transit as well as other modes.

As noted earlier, development in the period since World War II has tended to differ significantly from development patterns prior to the war. While immediate post-war patterns tended to include the grid of arterial roads, and oftentimes included a network pattern for residential streets, the tendency was also to isolate uses from one another. Vast areas of residential development were left without convenient access to neighborhood-serving retail. Similar patterns exist in the most recent development in the northern portions of the county; the substantial differences in the street patterns and layouts mask the recurring tendency towards isolation of different uses.

These situations create unique opportunities to integrate small-scale neighborhood centers into the residential fabric of post-war development. By removing as few as four residential units, often found in the least desirable locations at the intersection of two arterial roads or an arterial and a collector, a unique site can be found for 3,000 to 5,000 square feet of neighborhood-serving retail and commercial use. When located along an arterial, these centers are assured of a steady flow of drive-by customers. When located adjacent to a large cluster of residential development, and properly designed with easy connections into the residential neighborhoods, the residents are afforded easy access to day-to-day services and goods. The study area analyzed for the Post-War case study in the *Development Pattern Analysis* section included a number of locations that were ideally suited for this form of redevelopment transformation.

Opportunity Seven - *Make the benefits of redevelopment obvious, the impacts acceptable, and the outcome predictable.*

- Eliminate unfounded opposition.
- Win valuable and necessary community support.
- Encourage participation from the widest diversity of potential developers.

Faced with impending buildout, Pinellas County does not really have the luxury of simply evaluating the merits of redevelopment, or of limiting redevelopment efforts to one type of project or one type of developer. Rather, a framework must be created in which the broadest range of participation is encouraged. From the individual who looks to buy and fix up a single-family house as an investment to multinational corporations with hundreds of millions of dollars to spend on projects, the county must find ways to encourage and direct all forms of redevelopment.

A successful redevelopment program will involve participation from many different types of players, with many different levels of involvement.

The clearest way to do this is to look to make the benefits of redevelopment efforts obvious to the broadest range of participants, including the citizenry at large, who will be called upon to support such efforts, either politically or financially. Accompanying this display of benefits must be a lucid and even-handed effort to discuss and describe the impacts of such projects. Densification implies additional residents and increased intensity of development. In some areas, current residents will find this less than desirable. In other areas, however, not only will there be little resistance, there will be distinct appreciation. The locations, types of development, together with the intensity and density of new development must all be mapped out ahead of time and shared with both the general population and the range of players who will be asked to help carry out the redevelopment efforts. Ultimately, one of the keys to a successful redevelopment program is to work toward making the outcomes predictable. If people are aware of what is planned (or simply allowable) on a particular location, their potential resistance, once the project is underway, will be diminished. In fact, if people are aware of plans for key locations, they might work in concert with county and municipal officials to help bring such projects to fruition.

Various Types of Redevelopment

As noted, redevelopment efforts cannot and should not be limited to certain defined types of projects or certain types of professionals. The opportunities for successful, valuable, and desirable redevelopment abound within the county, at myriad scales, with the potential for active involvement of many different players.

Small-Scale Residential Restoration and Renovation

Historic Kenwood Neighborhood, St. Petersburg

The simplest way to foster redevelopment is for individual homeowners and/or investors to restore, renovate, and rehabilitate the homes that they own and occupy. While all redevelopment efforts depend on infusions of capital, in this situation the amounts needed may be quite small, and the funding sources quite diffused. The surest sign that a neighborhood is beginning to turn around is to drive along the streets and notice new paint jobs, new landscaping, new windows, and other architectural features.

Small-Scale Commercial and Multifamily Redevelopment

A step up from the owner-occupied house or even the investor-owned house is neighborhood-scale commercial and/or multifamily redevelopment. As with small-scale residential redevelopment, the restoration and renovation of existing buildings will probably precede the construction of new facilities. The embodied value of the older structures represents a discount to the restorers, a savings that allows them to bring such buildings back to productive use for a modest amount.

The City of St. Petersburg is currently experiencing a renaissance of this type of redevelopment, particularly in the neighborhoods along Central Avenue and within and immediately adjacent to the downtown. A key issue is that the revenues generated by the renovated structures more than account for the amortized cost of purchasing and renovating them. Currently, rents generated by street-level retail and commercial uses, and those generated by a wide range of multifamily apartments, are able to meet these criteria.

Neighborhood-Scale Commercial and/or Residential Development

As rents generated by renovation and restoration projects rise and not only pay off the costs of purchase and renovation, but also provide significant profits, there will be an escalation in the demand for, and the price of, similar unrenovated buildings in the same general locale. Once the supply of these buildings is exhausted, there will be a call for the development of new structures to match or complement the services provided by the older buildings.

The cost differential between redeveloped older structures and new structures can be significant, even if land costs are assumed to be similar. Without incentives, the rent structure that will support restored buildings might not be substantial enough to support new development. However, as the residential population of a neighborhood increases, or becomes more affluent due to gentrification, the call will increase for additional neighborhood services. In addition, the call will increase for uses and/or services that simply cannot be provided by older pre-existing buildings, e.g., loft units with secured, designated parking.

A key element in fleshing out the redevelopment of an older neighborhood is the selective infilling of new uses and/or combinations of uses. These should be physically scaled and designed to match the general scale and architectural character of the neighborhood.

Medium-Scale Commercial and/or Multifamily Redevelopment

As larger sites become available, they can be broken into pieces for a series of smaller-scale developments, or developed into integrated mixed-use projects, probably combining commercial (including retail) and one or more forms of residential development. The size and integration of uses increase the complexity and cost of such projects. They can still be undertaken by a single developer, but will entail some substantial public sector regulatory involvement. They may also entail some form of public-private partnership to ensure effective redevelopment; this may include both cash and non-cash contributions from the public sector.

BayWalk, St. Petersburg

Projects of this nature tend to have regional importance, and can include smaller versions of the grayfield projects mentioned above, or components of urban and transit-oriented centers. Developers will have to do extensive market analysis to ensure both the programmatic makeup of the project and the financial performance criteria and requirements. To the extent that the project includes two or more distinct uses, the overall time to achieve buildout may be extended.

Regional-Scale (Urban Mixed-Use) Redevelopment

Redmond, WA

Increasing the urban character of Pinellas County implies increasing the diversity and integration of uses. Larger grayfield sites lend themselves to redevelopment as complex regional scale mixed-use centers, such as Mizner Park and Winter Park Village referenced above. On any site of greater than 25 contiguous acres, the county should insist on redevelopment programs that includes a mix of uses. Ideally, such projects would adhere to a single, unified master plan (even though build out might take years, or even decades, to complete). The project should include at least three distinct uses (such as retail, office, residential), but may include more. It should be developed as a distinct urban center with all that this entails, including, primarily, a pedestrian orientation.

Opportunities of this size and complexity may not be found in every community within the county, but when found, they should be carefully programmed and planned. Some form of public sector involvement can be anticipated, and these properties may, in fact, be developed by a public-private partnership.

District Redevelopment

In certain situations, entire areas are formally or informally designated as warranting restoration, renovation, and revitalization. With formal designation, a government entity delimits an area deemed worthy of additional consideration. In Pinellas, such areas typically are defined as Community Redevelopment Areas (CRAs) or Community Redevelopment Districts (CRDs), and are provided with additional benefits and requirements, ostensibly to help direct new investment and growth.

In other instances, less formal designations are used. An area can be delimited as a Central Business District (CBD) or a downtown or even a specific neighborhood, and it is advertised that investment in this area is warranted and desired. No formal public or private privilege need accompany this designation, although generally governments tend to favor areas so designated, even if only informally.

Often, modest levels of public investment can help spur significant levels of private investment. In downtown Dunedin, for example, a series of investments for infrastructure, traffic calming, landscaping, parking, and other public amenities, has proven instrumental in inducing considerable private investment, particularly in the restoration and renovation of existing buildings. There has been limited investment in new construction – a series of live-work units and a new hotel are the exceptions – but as the supply of older buildings is turned over and rehabilitated, the market for new construction becomes more obvious.

Central Avenue, St. Petersburg

The ideal district redevelopment plan (formal or informal) finds roles for as many private sector players as possible, ranging from the individual who owns a structure and chooses to revitalize it, to the large-scale developer who looks to do a multi-million dollar mixed-use project.

Asking the Community for its Collective Vision

Introduction

During the Summit, a community urban design visioning exercise was conducted. The exercise was a hands-on brainstorming session concentrating on how to direct redevelopment. Visioning is not an academic exercise, but rather a means to provide the community with feasible, creative solutions to the pressing issues of where and how to allocate redevelopment opportunities within the county.

Why ask for a community vision in a simplified and game-like format? Concisely stated, the planning efforts of a county need the benefit of creative design. Through countywide visioning, the established codes for development are ignored and municipal boundaries disappear. Instead, the participants are given a new set of rules that relate to optimizing location and maximizing efficiency in transportation. An exercise like this can liberate concealed and foreseeable possibilities; it can reveal a community's collective perceptions about special interests and aspirations. And, it can yield multiple benefits. It can:

- Help the community solve problems and build consensus.
- Generate and test new ideas.
- Identify new opportunities.
- Show what a community thinks of itself.
- Help reach across political boundaries.

By commissioning this event, the Pinellas Planning Council and the Pinellas County Board of County Commissioners through its Economic Development Department made a good investment and have capitalized on the intellectual resources of the community.

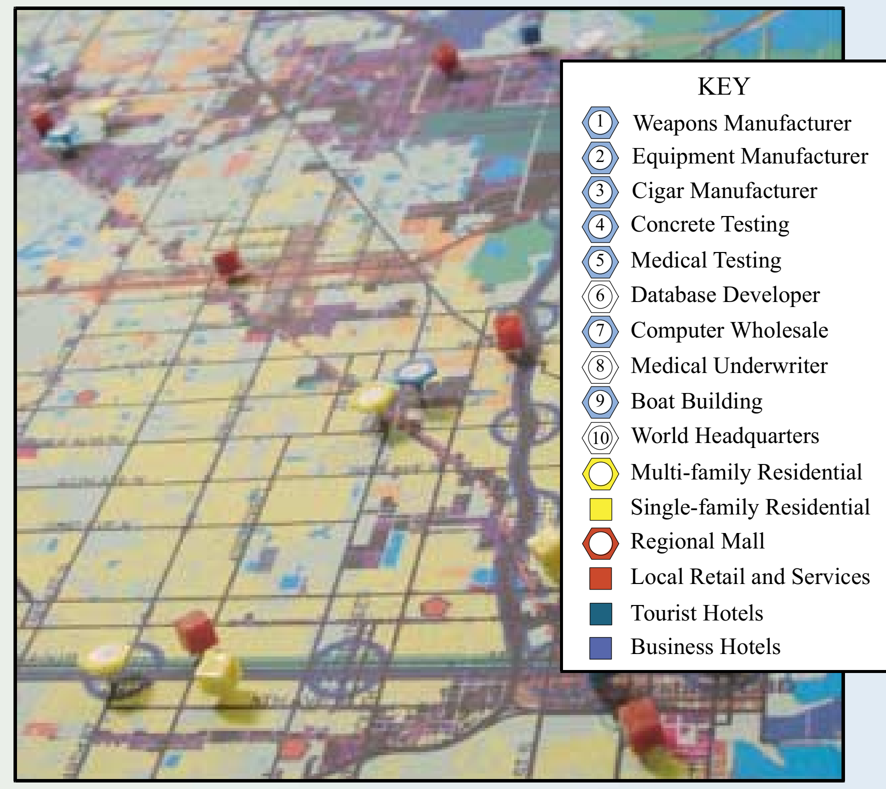
Rules of the Game

The goal of the urban design visioning exercise is to help community leaders reach a vision for redevelopment in the county. It is assumed that participants understand three basic principles:

- Economic redevelopment is catalyzed by attracting new primary employers, who provide the top paying jobs.
- Real estate opportunities are presented by underutilized land in strategic locations.
- Appropriate urban design stimulates healthy growth.

The game consists of allocating ten primary employers, seven manufactures that would generate 2,150 new jobs, and three office workplaces that would generate 850 new jobs. These new 3,000 jobs will, in turn, spawn 12,000 additional secondary jobs and a new demand for housing. Participants are asked to locate 1,500 dwelling units, one third of which are single-family development and the other two-thirds are higher density multifamily. Residential development should be located within an eight-mile radius from the newly created primary employers. Subsequently, participants are asked to locate 3.2 million square feet of commercial development that would serve the new residential development divided between one major regional center and neighborhood and community retail locations. Last, but not least, participants are to locate eight hotels, of which four are tourist hotels, and the other four are business-oriented hotels.

How and where to locate the new development? A different pushpin represents each typology of development. In the game there are:



- 7 blue hexagonal pins for manufacturing primary employers
- 3 white hexagonal pins for office workplace primary employers
- 10 yellow hexagonal pins for multifamily development
- 10 yellow square pins for single-family residential development
- 1 red hexagonal pin for a regional center
- 15 red square pins for neighborhood and community retail
- 4 green square pins for tourist hotels
- 4 blue square pins for business hotels

The map of the county is seen as a game board where areas appropriate for redevelopment are identified in different colors. These include underutilized industrial or commercial land, designated Community Redevelopment Districts, Central Business Districts, single and multiple-ownership mobile home parks, and housing stock over 50 years of age and with a value below $100,000. Pins are located on redevelopment areas or anywhere else on the game board except in designated environmentally sensitive areas, schools, civic buildings, and stable development. In addition, primary roads, freight rail, planned high-speed rail, and monorail alignments are illustrated.

Summary

Prior to the visioning exercise, members of the Summit Steering Committee, who were part of the critical thinking process that shaped the activity, were designated as facilitators. An impressive array of citizens and public officials attended, and all participants had been to a full day of education on how to make redevelopment happen from three perspectives: the economy, real estate, and urban design.

Attendees were broken into groups as a means of effectively engaging them in an active process. The teams accomplished a remarkable amount of work in a very limited amount of time. Each came up with strong ideas and unique themes to unite their vision. The results were creative and assuring.

For the Summit organizers, what underlies this report is of concern: *a fundamental sense of urgency in directing long-term planning or else facing a quite plausible decline in the quality of life*. Fortunately, the results are positive from the community's point of view. For Summit participants, there was a desire to change, to focus densification/intensification, and to make identified areas more urban. Likewise, there was an overall optimism that welcomed new paradigms and redevelopment itself. Teams supported the premises that the right investment decisions, suitable land uses, appropriate transportation, and accurate design at the correct scale will go a long way towards addressing the problems of Pinellas County in the future. These strategies will not solve all the problems, nor can they be solved in a two-day summit, but it is clear that redevelopment requires commitment, along with the adoption of comprehensive policies and the application of specific strategies.

Team A

Team A covered the county in a relatively uniform way, placing major concentrations of development along the I-275 corridor, the area between Largo and the St. Petersburg/Clearwater International Airport, and along Gulf-to-Bay Boulevard. Lesser concentrations were placed in Tarpon Springs, Oldsmar, and Dunedin.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Four heavy industry employers were located in the central part of the county; the boat builder in a Tarpon Springs industrial park; and the cigar factory in downtown St. Petersburg.

Primary Employers-Office: The database developer was located in Dunedin; the underwriter of medical services along Gulf-to-Bay Boulevard; and the headquarters office in an Oldsmar industrial park.

Multifamily Residential: Most of the multifamily residential was located along the monorail alignment; the rest were on Lake Tarpon, in Safety Harbor, and Largo. All of them were located in single-ownership mobile home parks.

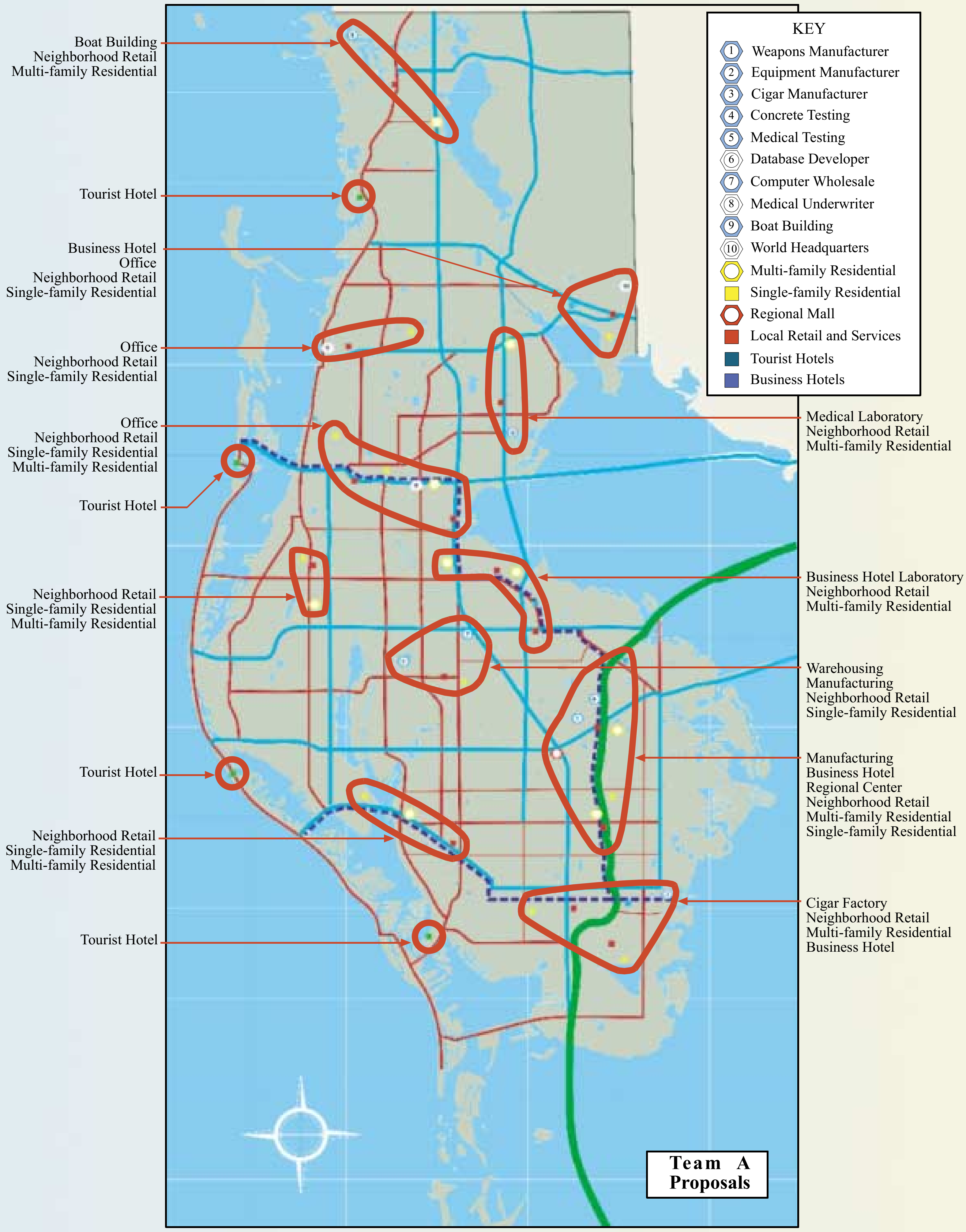
Single-family Residential: Three developments were located on single-ownership mobile home parks with the balance in obsolete residential areas.

Retail and Services: Seven retail centers were located at station areas along the monorail alignment, and 3 on single-ownership mobile home parks.

Regional Shopping Mall: Pinellas Square Mall was designated.

Business Hotels: Locations are in Oldsmar, St. Petersburg/Clearwater International Airport, Gateway district, and on Central Avenue in St. Petersburg.

Tourist Hotels: Locations are in Palm Harbor at the Pinellas Trail, Clearwater Beach, Madeira Beach, and South Pasadena.



Team B

Team B proposed 10 clusters of mixed residential and retail through the county and created 3 intense clusters in Tarpon Springs, downtown Clearwater, and the Lealman neighborhood.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Heavier industry was placed on the Ulmerton Road corridor with other industry in the Gateway district. The cigar manufacturer was located in downtown St. Petersburg and the boat builder in Tarpon Springs.

Primary Employers-Office: Office developments were placed in downtown Clearwater, Belleair, and the Gateway district.

Multifamily Residential: Two developments were placed in downtown Clearwater with the remainder uniformly located throughout the county of which 7 locations were at transit stops.

Single-family Residential: Some developments were placed on mobile home parks; others were located on the Anclote River, downtown Clearwater, Dunedin, and St. Petersburg.

Retail and Services: Team B located 80 percent of the retail and services development adjacent to residential development and the remainder in established residential areas.

Regional Shopping Mall: The Tarpon Glen Mobile Home Park in Tarpon Springs was designated.

Business Hotels: Designated locations were downtown St. Petersburg, the Gateway district, Largo, and on the west end of Ulmerton Road.

Tourist Hotels: Two hotels were located on Clearwater Beach, one in Gulfport and one adjacent to Eckerd College in St. Petersburg.

Team C

Team C proposed a general countywide distribution of development. However, concentrations of development can be seen in the Gateway district, Largo, Pinellas Park, and downtown St. Petersburg.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Heavy industry was placed mostly in the Gateway district. Medical testing was located at the monorail station area on Roosevelt Boulevard in proximity to the Greenbrook neighborhood. Wholesale office and warehousing were placed in Oldsmar; the boat builder in Tarpon Springs; and the cigar manufacturer in downtown St. Petersburg.

Primary Employers-Office: The database developer was placed in downtown Clearwater; the medical underwriter in the Tomes Square neighborhood of St. Petersburg; and the global headquarters in the Gateway district.

Multifamily Residential: Three developments were placed in Largo; other selected locations were Pinellas Park Community Redevelopment District, downtown Clearwater, East Bay Drive, a mobile home park in Redington Shores, and two station areas along the monorail alignment.

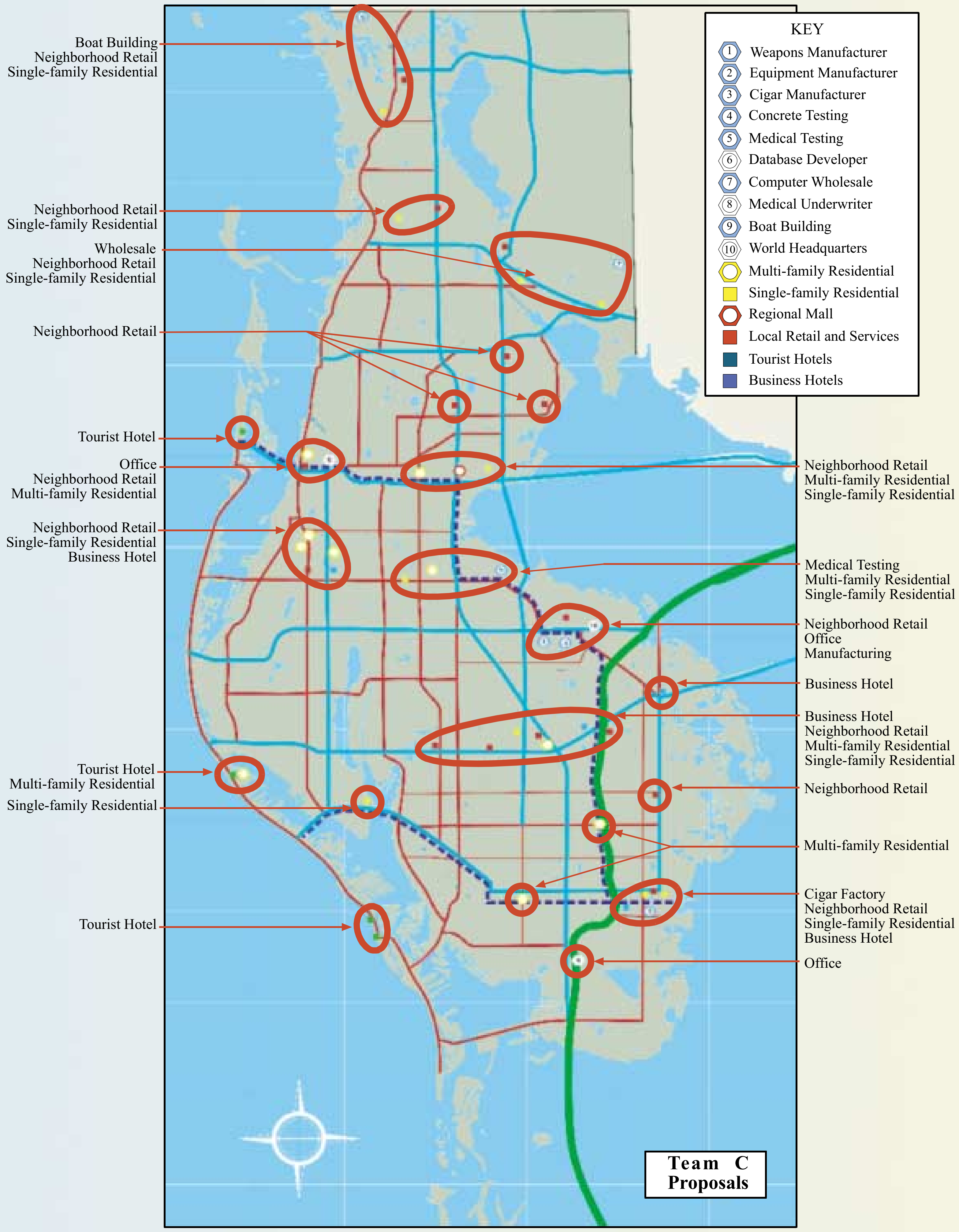
Single-family Residential: Selected locations include a mobile home park west of the Seminole Bridge, north of downtown St. Petersburg, Pinellas Park Community Redevelopment District, Largo, Clearwater, Oldsmar, and Palm Harbor.

Retail and Services: Team C generally placed retail and services development in strategic intersections along US 19, McMullen-Booth Road, Baskins Road, Park Boulevard, and 4th Street in St. Petersburg.

Regional Shopping Mall: The Clearwater Mall site was selected.

Business Hotels: Two locations were selected in the Gateway district, 1 in downtown St. Petersburg, and 1 in Largo.

Tourist Hotels: Two locations were selected in Treasure Island, 1 in Redington Shores, and 1 in Clearwater Beach.



Team D

Team D proposed to strengthen nodes and to create village-like areas by applying mixed-use development. Three compact clusters were proposed for St. Petersburg, the Gateway district, and Tarpon Springs. Looser clusters were proposed in Pinellas Park, Largo, Clearwater, Oldsmar, and Dunedin.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Team D proposed to concentrate primary employment generators where they already exist. Medical testing and wholesale companies were located in the Gateway district and the cigar manufacturer and concrete testing in St. Petersburg's Highland Crest neighborhood. The military industry was placed in the Young-Rainey STAR Center and the boat builder in Tarpon Springs with the resonance-imaging manufacturer in Oldsmar.

Primary Employers-Office: The medical underwriter was placed in Dunedin; the database developer in downtown St. Petersburg; and the global headquarters in the Gateway district.

Multifamily Residential: Team D proposed to locate residential where they considered redevelopment and diversification were needed. Locations included the St. Petersburg neighborhoods of Colonial Place and Kew Gardens. Other placements included mobile home parks on both ends of the Pinellas Park Community Redevelopment District, Largo, Oldsmar, and Tarpon Springs.

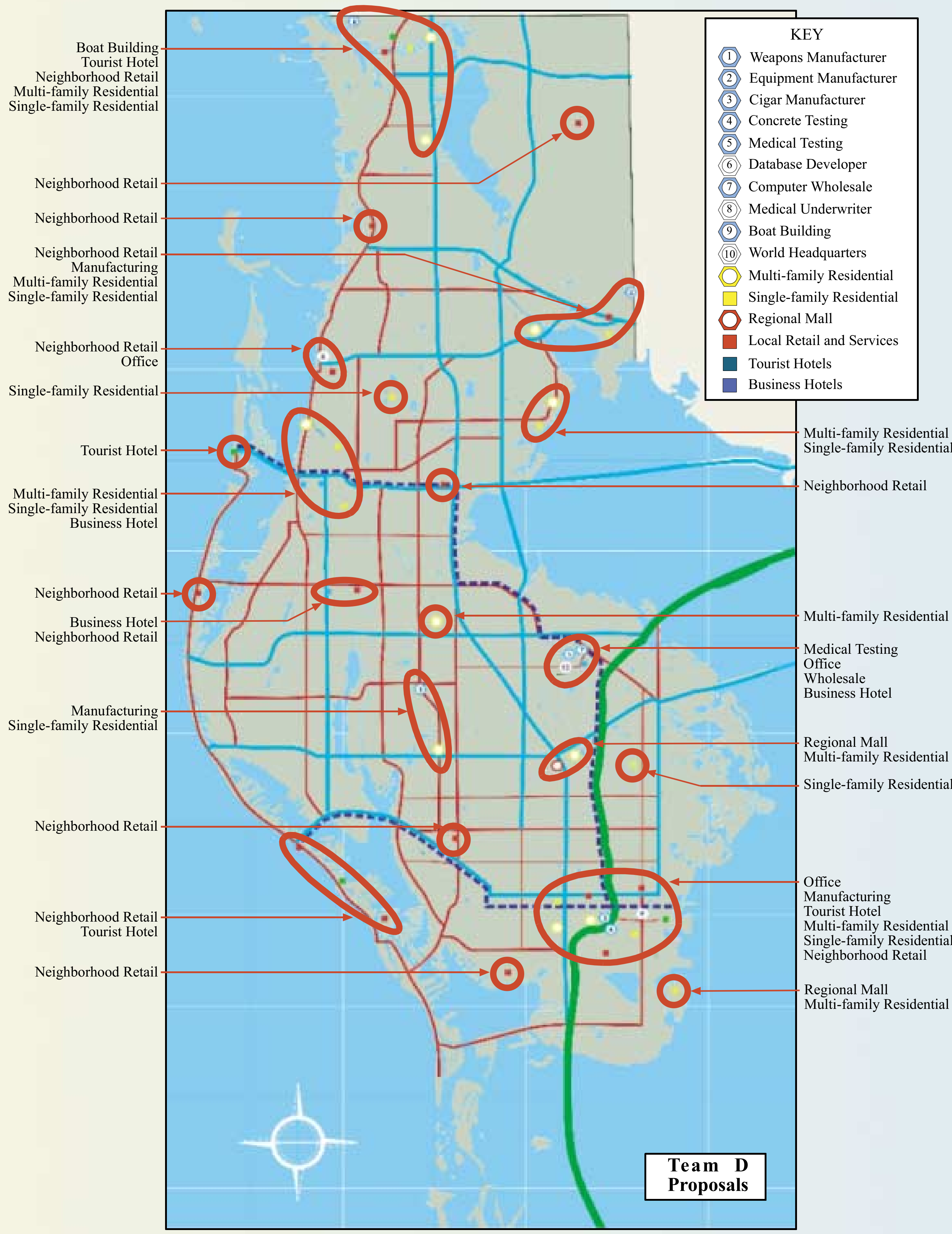
Single-family Residential: Placements included Tarpon Springs, Oldsmar, Clearwater, and St. Petersburg.

Retail and Services: Neighborhood retail was concentrated close to residential areas with the intent of minimizing drive times. One placement was adjacent to the subdivisions in the Brooker Creek Preserve. Other placements included Tarpon Springs, Oldsmar, Palm Harbor, Dunedin, Largo, Gulfport, St. Petersburg, and the beaches.

Regional Shopping Mall: The Pinellas Square Mall location was selected.

Business Hotels: Two were located in downtown Clearwater, 1 in Largo, and 1 in the Gateway district.

Tourist Hotels: Locations included downtown St. Petersburg, Madeira Beach, Clearwater Beach, and Tarpon Springs.



Team E

Team E differed from other team proposals in that, except for a tourist hotel in St. Petersburg, no development was proposed for Clearwater or the St. Petersburg Central Business Districts. The proposal covered the county in a rather uniform way.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Heavy industry is dispersed in the Gateway district; the cigar manufacturer and the concrete testing were placed in Tarpon Springs.

Primary Employers-Office: The database developer was located on McMullen-Booth Road; the medical underwriter on Ulmerton Road; and the global headquarters in the Gateway district.

Multifamily Residential: About half of the multifamily residential development was proposed in mobile home parks. One development was placed in Dunedin, and the other 2 in less dense areas of the county.

Single-family Residential: Most of the single-family residential was also placed in mobile home park sites. Other locations include Safety Harbor and Eckerd College.

Retail and Services: The largest concentration was in Tarpon Springs; the rest was interspersed throughout the county. Some locations include Eckerd College, Pinellas Park, and Largo.

Regional Shopping Mall: Tampa Road next to the county line in Oldsmar was the designated location.

Business Hotels: Locations include St. Petersburg/Clearwater International Airport, Ulmerton Road just off the I-275 in the Gateway district, Largo, and a Clearwater industrial park.

Tourist Hotels: Locations included downtown St. Petersburg, Redington Shores, the Gateway district, and Tarpon Springs.

Team F

Team F proposed mixed clusters of development in at least 7 locations. Some of the clusters included a primary employer, multifamily residential, and commercial development. Other clusters included only residential and primary employment, or residential and retail and services.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Some development was located along the CSX tracks; the military industry and the concrete testing developments were placed between Largo and Pinellas Park; and the boat builder was placed in the vicinity of the Lealman neighborhood. Medical testing was placed in the Gateway district; the computer wholesaler in Oldsmar; the resonance imaging manufacturer in Tarpon Springs; and the cigar manufacturer in downtown Clearwater.

Primary Employers-Office: The database developer was placed in Dunedin; the medical underwriter in downtown Clearwater; and the global headquarters in the Gateway district.

Multifamily Residential: Eighty percent of the multifamily residential development was placed adjoining proposed development including primary employers and retail. Three developments were placed in monorail station areas. Other placements included mobile home parks on McMullen-Booth Road and in Dunedin.

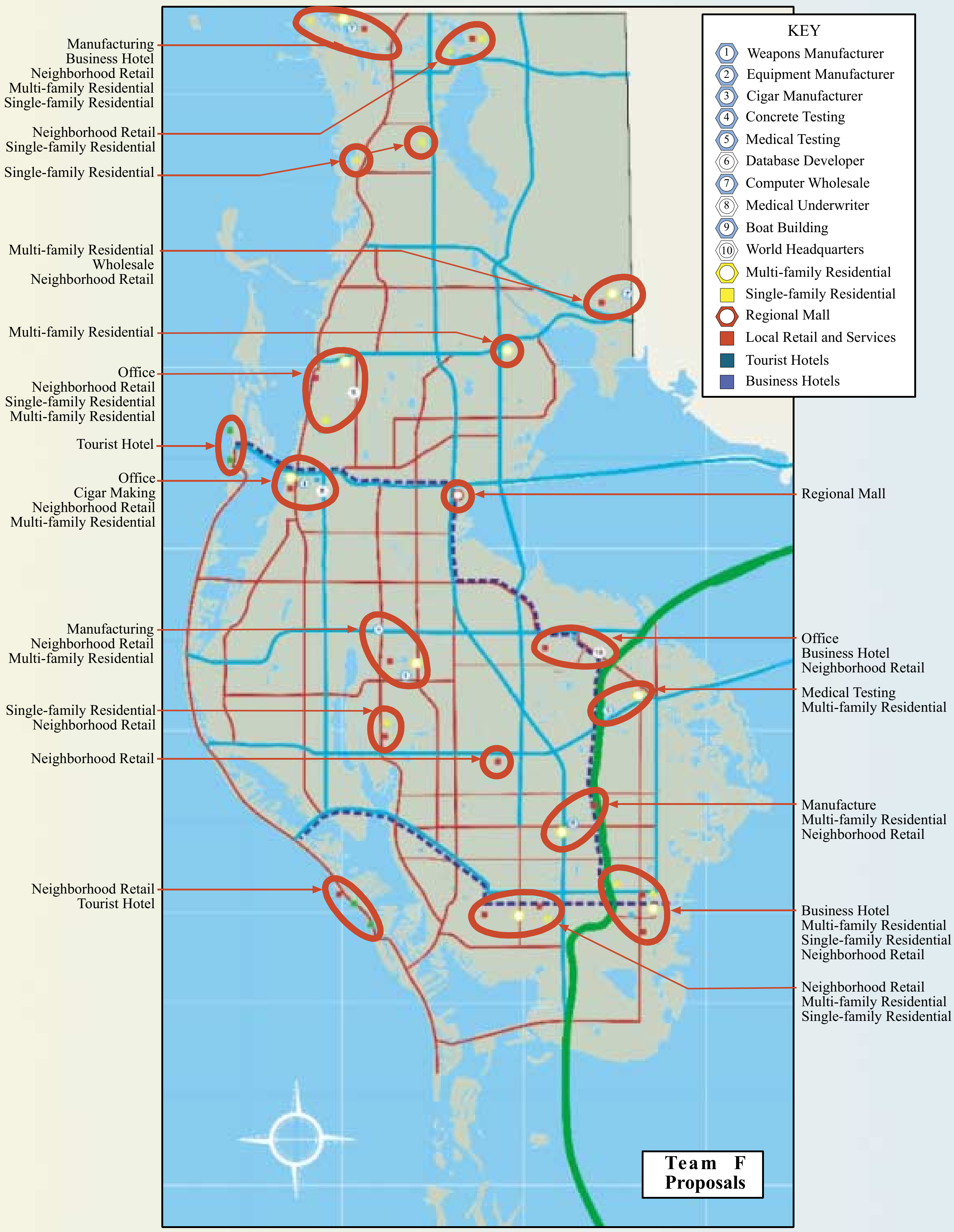
Single-family Residential: Single-family residential development was loosely placed throughout the county.

Retail and Services: Locations include Madeira Beach, the Central Avenue corridor, downtown St. Petersburg, Starkey Road, downtown Clearwater, Dunedin, Oldsmar, and Tarpon Springs.

Regional Shopping Mall: The Clearwater Mall site was designated.

Business Hotels: Designated sites include downtown St. Petersburg, the Gateway district, downtown Clearwater, and Tarpon Springs.

Tourist Hotels: Two placements were made in Clearwater Beach and 2 in Madeira Beach.



Team G

Team G proposed 4 major clusters of development around Lake Seminole, between Largo and the Gateway district, in Clearwater, and in Tarpon Springs. Ninety-five percent of the development was placed north of 62nd Avenue North.

DEVELOPMENT OPTIONS

Primary Employers-Industry: The boat builder and the cigar manufacturer were placed in Tarpon Springs; the remainder were placed in the central part of the county between Largo and the Gateway district.

Primary Employers-Office: The database developer and global headquarters were placed in the Gateway district; and the medical underwriter on the bend of Bryan Dairy Road just east of Lake Seminole.

Multifamily Residential: Placements included the south side of Tarpon Springs, north of downtown Clearwater, Drew Street, Seminole, Starkey Road, Pinellas Park, and the north end of St. Petersburg.

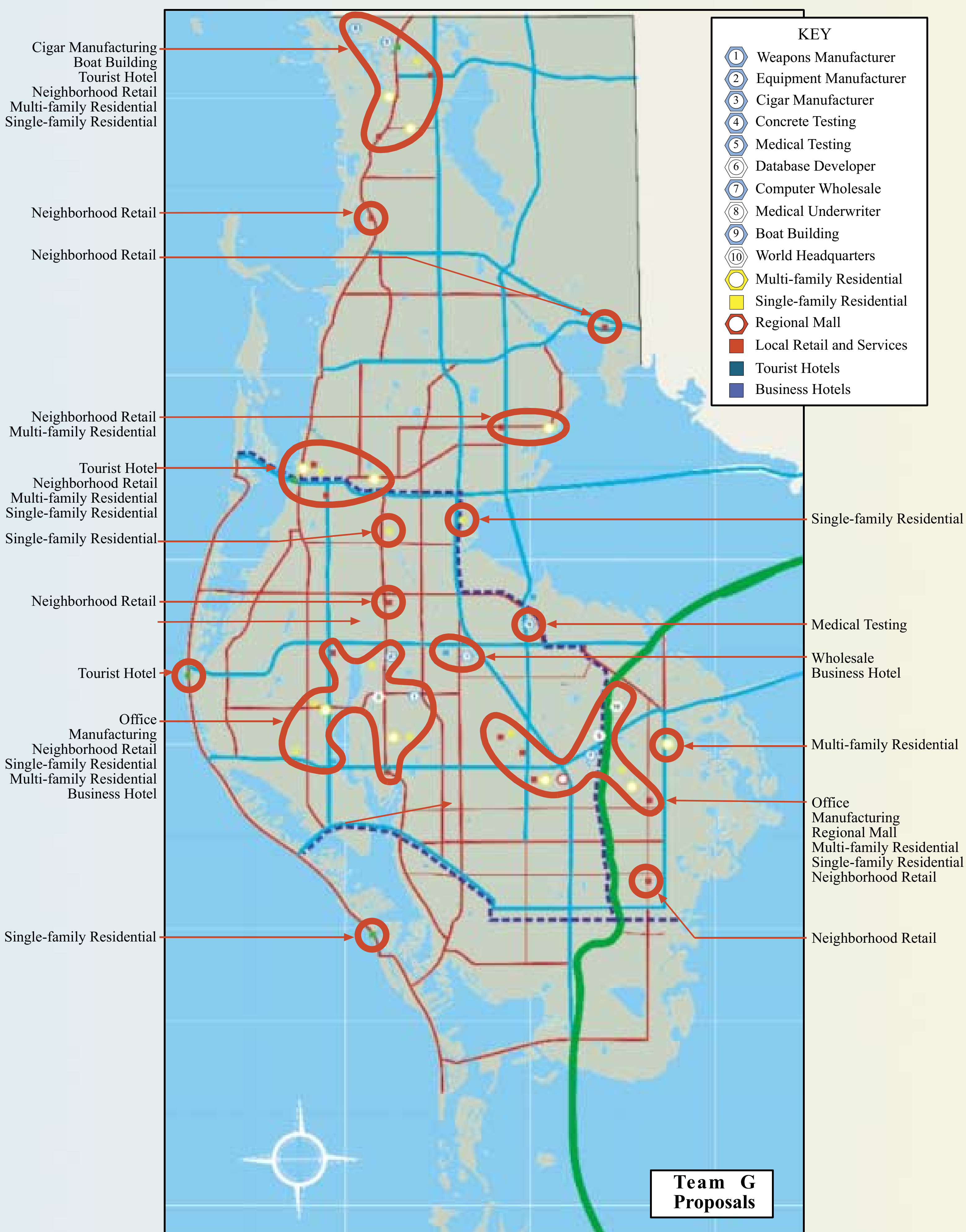
Single-family Residential: Only 1 development was placed on a mobile home park site; the remainder were placed throughout the county following a pattern similar to the placement of multifamily residential development.

Retail and Services: Placements include Martin Luther King Boulevard in St. Petersburg, Pinellas Park, Seminole, and Clearwater.

Regional Shopping Mall: The Pinellas Square Mall site was designated.

Business Hotels: Designated locations include Ulmerton Road, Park Boulevard at Lake Seminole, Gandy Boulevard, and St. Petersburg/Clearwater International Airport.

Tourist Hotels: Designated locations include Tarpon Springs, downtown Clearwater, Treasure Island, and Indian Rocks Beach.



Team H

Team H proposed mixed-use clusters in Tarpon Springs, Oldsmar, Clearwater, the Gateway district, and along the I-275 corridor.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Boat building and cigar making were placed in Tarpon Springs; wholesale, medical testing, and resonance imaging in the Gateway district; concrete testing in the Young-Rainey STAR Center on Bryan Dairy Road; and the military industry on the south side of the Tyrone Square Mall site.

Primary Employers-Office: The database developer was placed in downtown Clearwater; the medical underwriter on Central Avenue in St. Petersburg; and the global headquarters in Oldsmar.

Multifamily Residential: Multifamily residential development was placed in proximity to primary employers, major arterials, and the monorail, and 2 selected locations included mobile home parks.

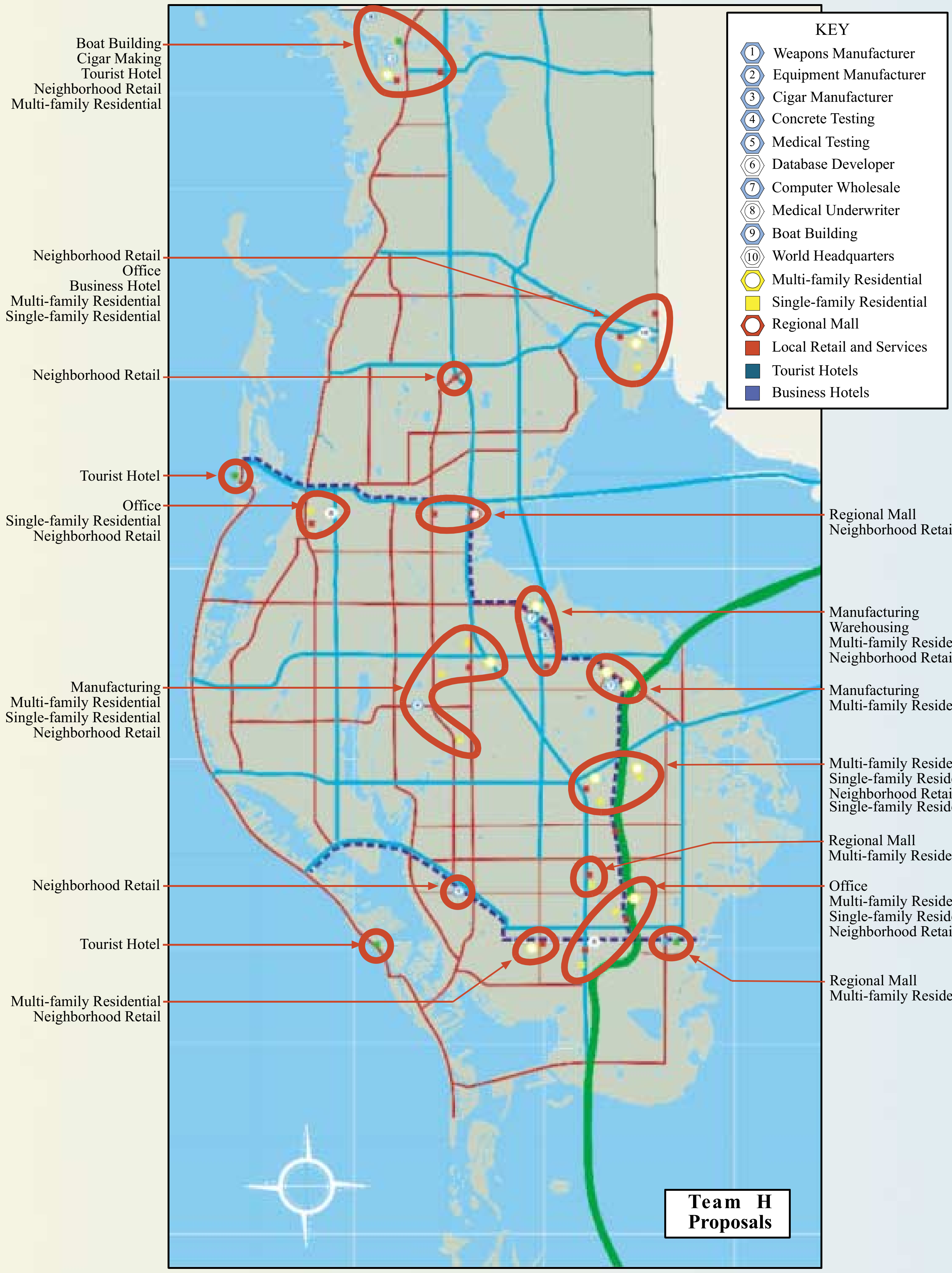
Single-family Residential: Single-family development was generally placed off minor arterials; only 1 development was placed on the transit line and 4 were placed in mobile home parks.

Retail and Services: Most placements were designated close to proposed development; 4 were detached and placed on major arterials.

Regional Shopping Mall: The Clearwater Mall site was designated.

Business Hotels: Designated locations include downtown St. Petersburg, the Gateway district, the St. Petersburg/Clearwater International Airport, and Oldsmar.

Tourist Hotels: Designated locations include Tarpon Springs, Clearwater Beach, Treasure Island, and downtown St. Petersburg.



Team I

Team I approached the exercise by focusing development in two general areas of the county: the mid-section and the northeastern section. Special attention was given to 3 main arterials: McMullen-Booth Road, East Bay Drive, and Ulmerton Road.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Five industries were located on unincorporated county lands, 2 heavy industries along the CSX rail tracks, 2 in the Gateway district, and 1 on Tampa Road. The cigar manufacturer was located in the West Village area of St. Petersburg and the boat builder in Tarpon Springs.

Primary Employers-Office: The database developer was located in downtown Clearwater; the underwriter of medical services along McMullen-Booth Road in Safety Harbor; and the headquarters office in the Gateway district.

Multifamily Residential: This option introduced residential development adjacent to the Carillon district. Eighty percent of the multifamily residential was located in the mid-section of the county between Gulf-to-Bay Boulevard and Ulmerton Road; the rest was placed in the northeastern part of the county.

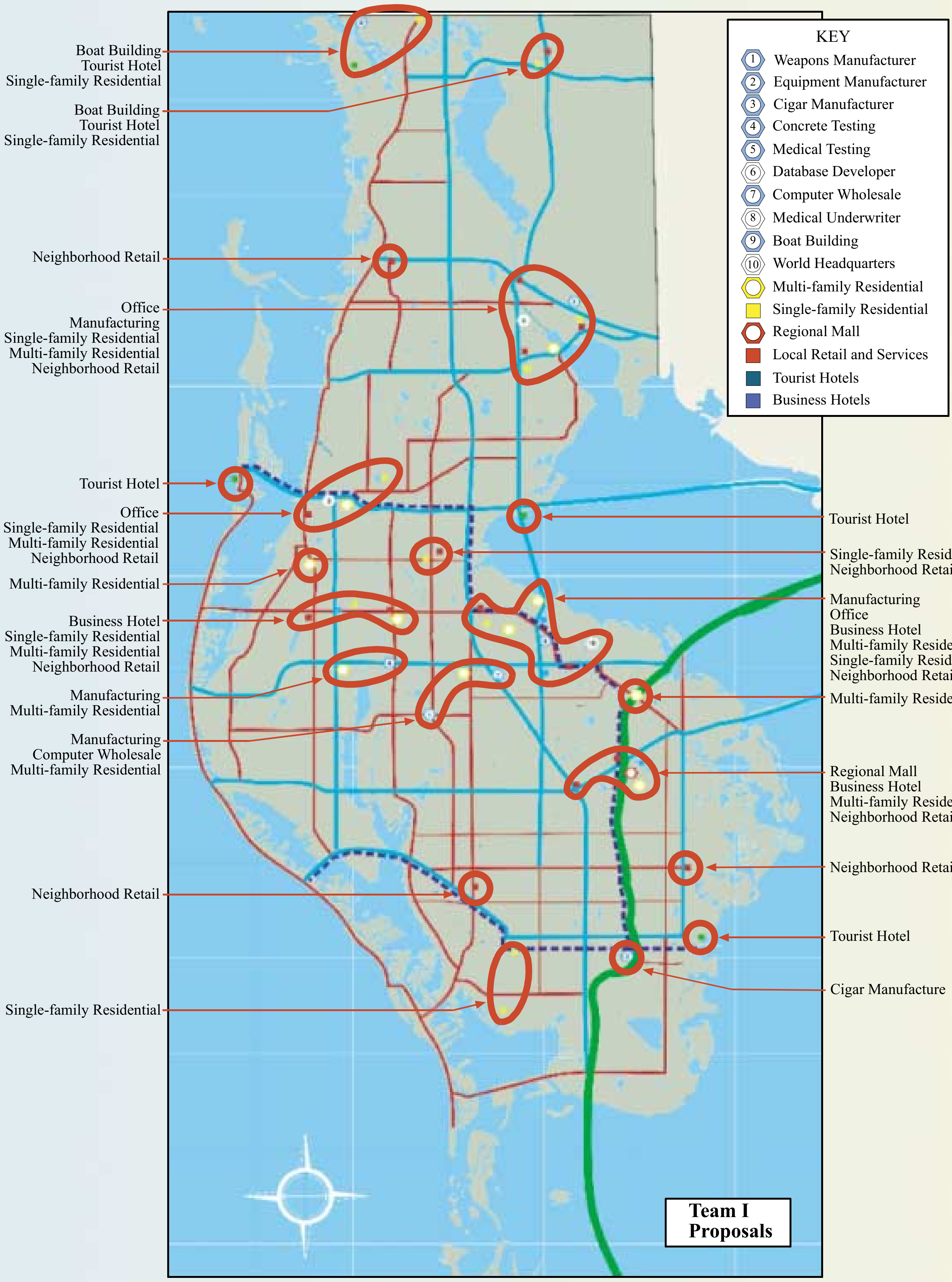
Single-family Residential: Single-family residential development was scattered rather uniformly throughout the county. One development was placed in a single-ownership mobile home park.

Retail and Services: Retail and services development were placed in St. Petersburg on 4th Street and adjacent to the Tyrone Mall. Other placements included Pinellas Park, Largo, the Gateway district, downtown Clearwater, Palm Harbor, and along McMullen-Booth Road.

Regional Shopping Mall: The southeast quadrant of the intersection between I-275 and Gandy Boulevard, in the Sawgrass Lake district, was designated.

Business Hotels: Four selected locations were: on the south side of Gandy Boulevard and east of the I-275, on Ulmerton Road and 49th Street, west of the Bayside Bridge adjacent to the airport, and in the Largo Community Redevelopment District.

Tourist Hotels: Locations were Clearwater Beach, Tarpon Springs, downtown St. Petersburg, and on the west side of the Bayside Bridge and the Courtney Campbell Causeway.



Team J

Team J proposed to place 85 percent of the development in the central and southern parts of the county. Three concentrations of development cover the Gulf-to-Bay corridor, the Gateway district, and the Central Avenue corridor.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Heavy industry was placed in the Gateway district; medical testing in the Pinellas Star Industrial Park; the cigar manufacturer in St. Petersburg; and the boat builder in Tarpon Springs.

Primary Employers-Office: The database developer was placed in downtown Clearwater; the medical underwriter in Oldsmar; and the global headquarters in the Gateway district.

Multifamily Residential: Team J opted to trade 4 single-family development placeholders for multifamily development. Half of the multifamily residential development was placed in mobile home parks, and about half along the monorail alignment. The remainder was located in Madeira Beach, St. Petersburg, Pinellas Park, and Clearwater.

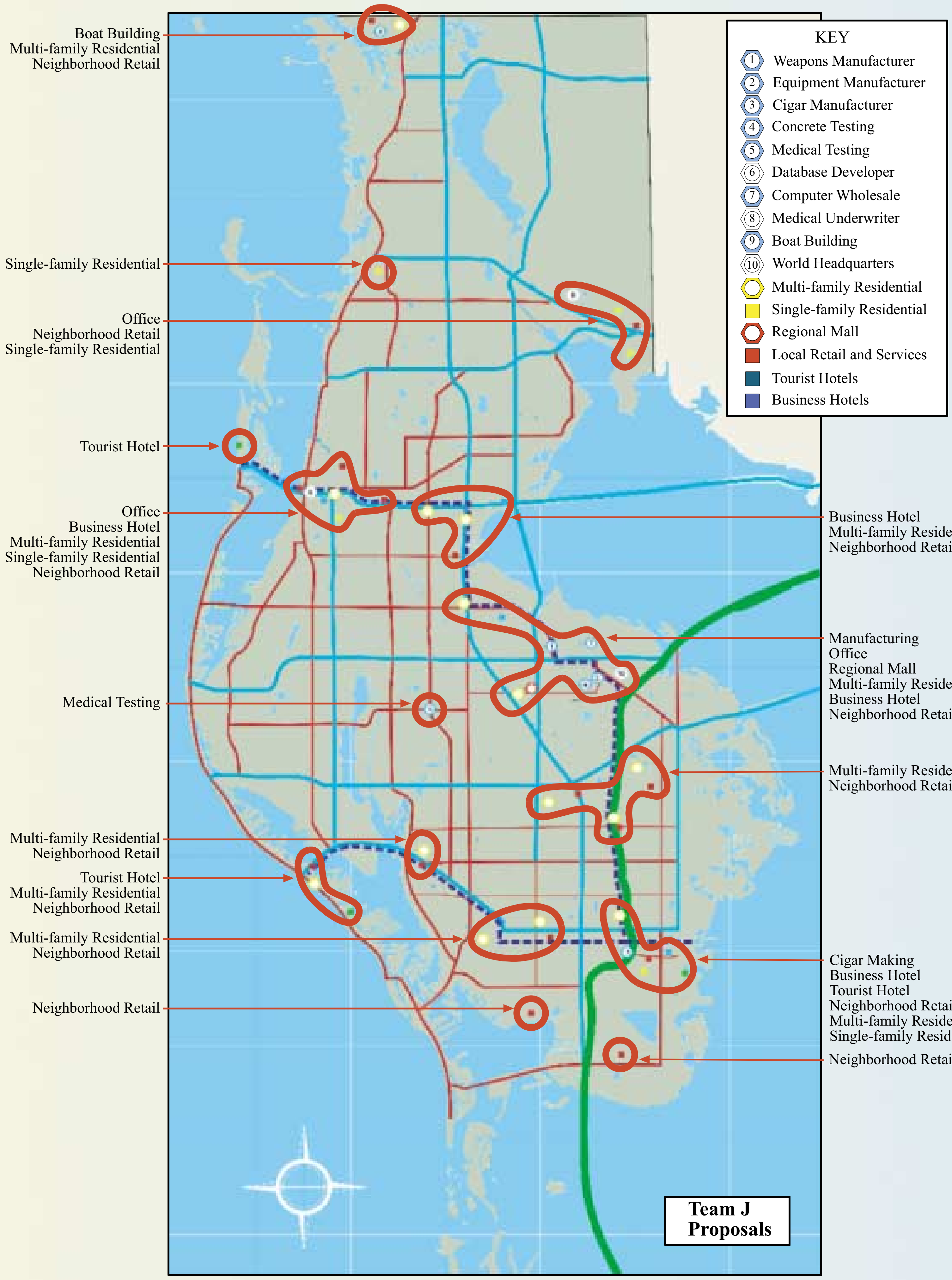
Single-family Residential: Placements included Oldsmar, St. Petersburg, Clearwater, and Palm Harbor.

Retail and Services: About half of the retail and services development was associated with new development; other placements included Gulfport, Pinellas Point in St. Petersburg, Pinellas Park, east Nursery Road, and Palmetto Street in Clearwater.

Regional Shopping Mall: The designated site was in the Gateway district off US 19 between 49th Street and 58th, and between 118th Street and Ulmerton Road, just north of the Calvary Catholic Cemetery.

Business Hotels: Locations included downtown Clearwater, the east end of Gulf-to-Bay Boulevard, Roosevelt Boulevard, and downtown St. Petersburg.

Tourist Hotels: Team J opted not to assign 1 hotel; the others are at Clearwater Beach, Madeira Beach, and downtown St. Petersburg.



Team K

Team K proposed to concentrate development in 7 general areas throughout the county: Tarpon Springs, the Anclote River and Lake Tarpon, Oldsmar, Dunedin, the east end of Gulf-to-Bay Boulevard extended to the Clearwater Industrial Park, Seminole, and the north and south ends of St. Petersburg.

DEVELOPMENT OPTIONS

Primary Employers-Industry: A Tarpon Springs industrial park was the designated location for 2 heavy industries. Other designated locations included a Clearwater industrial park, Oldsmar, the Gateway district, and Seminole. Team K opted not to place the cigar manufacturer.

Primary Employers-Office: The database developer was located in St. Petersburg, the world headquarters in the Gateway district, and the medical underwriter in Dunedin.

Multifamily Residential: Clusters of multifamily development were at the north end of St. Petersburg and the east end of Gulf-to-Bay Boulevard. Other multifamily development was located in Dunedin, Oldsmar, Tarpon Springs, and Pinellas Park.

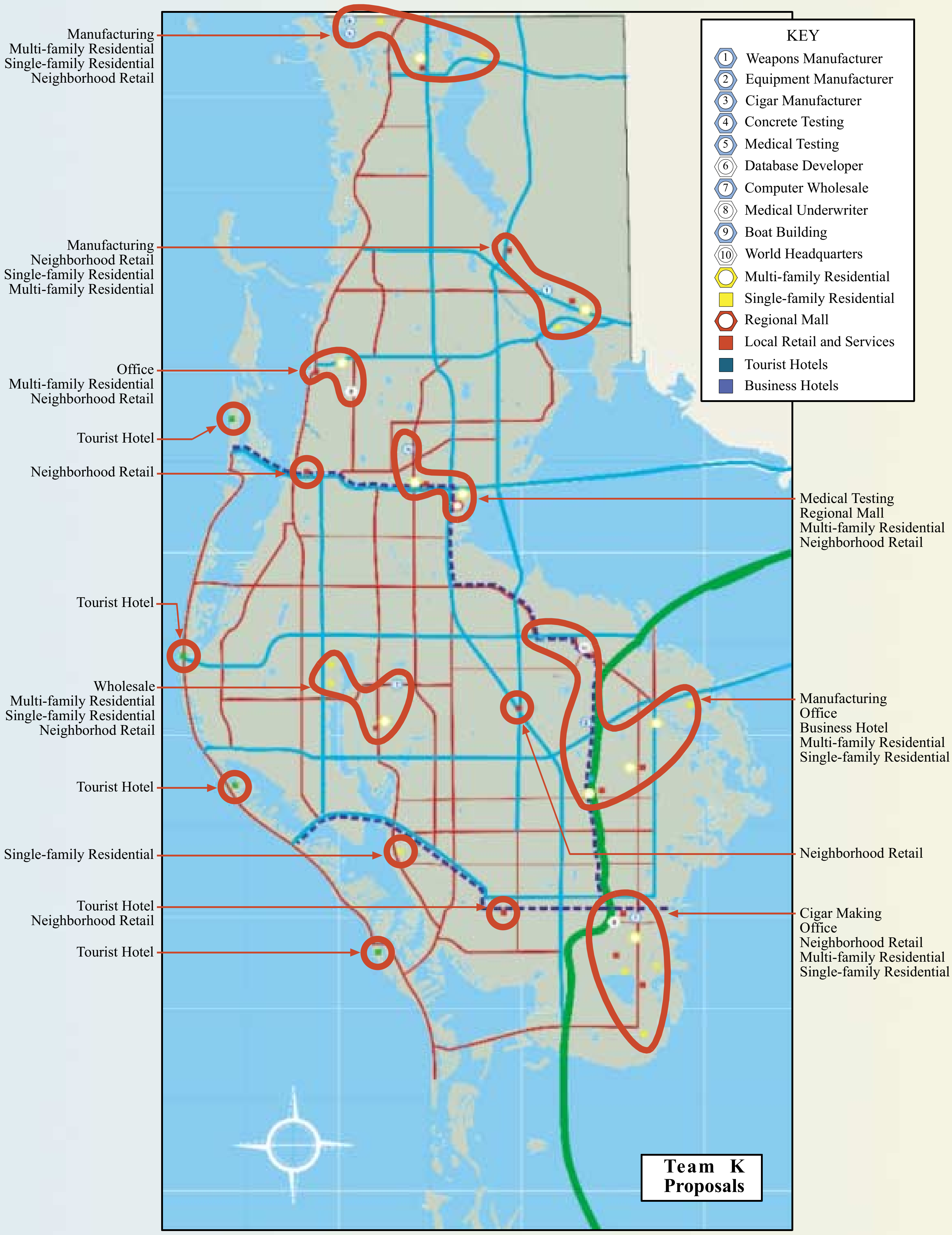
Single-family Residential: Clusters were placed in Seminole and south St. Petersburg. Other locations included 2 mobile home parks, 1 on Gandy Blvd. and the other in Tarpon Springs. The remainder were located in Jungle Terrace, Oldsmar, and Farmcrest Acres in the northern part of the county.

Retail and Services: There were clusters in St. Petersburg and Oldsmar. The remainder was scattered throughout the county including Pinellas Park, Clearwater, Dunedin, and Tarpon Springs.

Regional Shopping Mall: The Clearwater Mall site was designated.

Business Hotels: Locations included the I-275 corridor, downtown St. Petersburg, Tarpon Springs, and on Ulmerton Road.

Tourist Hotels: All tourist hotels were assigned to the beaches.



Team L

Team L proposed several clusters of mixed development including St. Petersburg, Pinellas Park, the Gateway district, Seminole, Largo, Clearwater, Dunedin, Oldsmar, and Tarpon Springs. Downtown Clearwater was seen as the most diverse, including primary employment, multifamily residential, retail and services, and a hotel.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Concrete testing, medical testing, and wholesale were placed in the Gateway district; the boat builder on Belcher Road; military industry in St. Petersburg; the magnetic resonance manufacturer in Oldsmar; and the cigar manufacturer in Tarpon Springs.

Primary Employers-Office: The database developer was placed in downtown Clearwater; the medical underwriter in the Nielson property in Dunedin; and the global headquarters in the Gateway district.

Multifamily Residential: Placements included 3 mobile home parks: 1 in St. Petersburg adjacent to the Mangrove Bay Municipal Gulf Course, 1 on Roosevelt Boulevard, just west of the Bayside Bridge, and 1 on Gulf-to-Bay Boulevard. Other placements included downtown Clearwater, Dunedin, and waterfront locations in Oldsmar and Tarpon Springs.

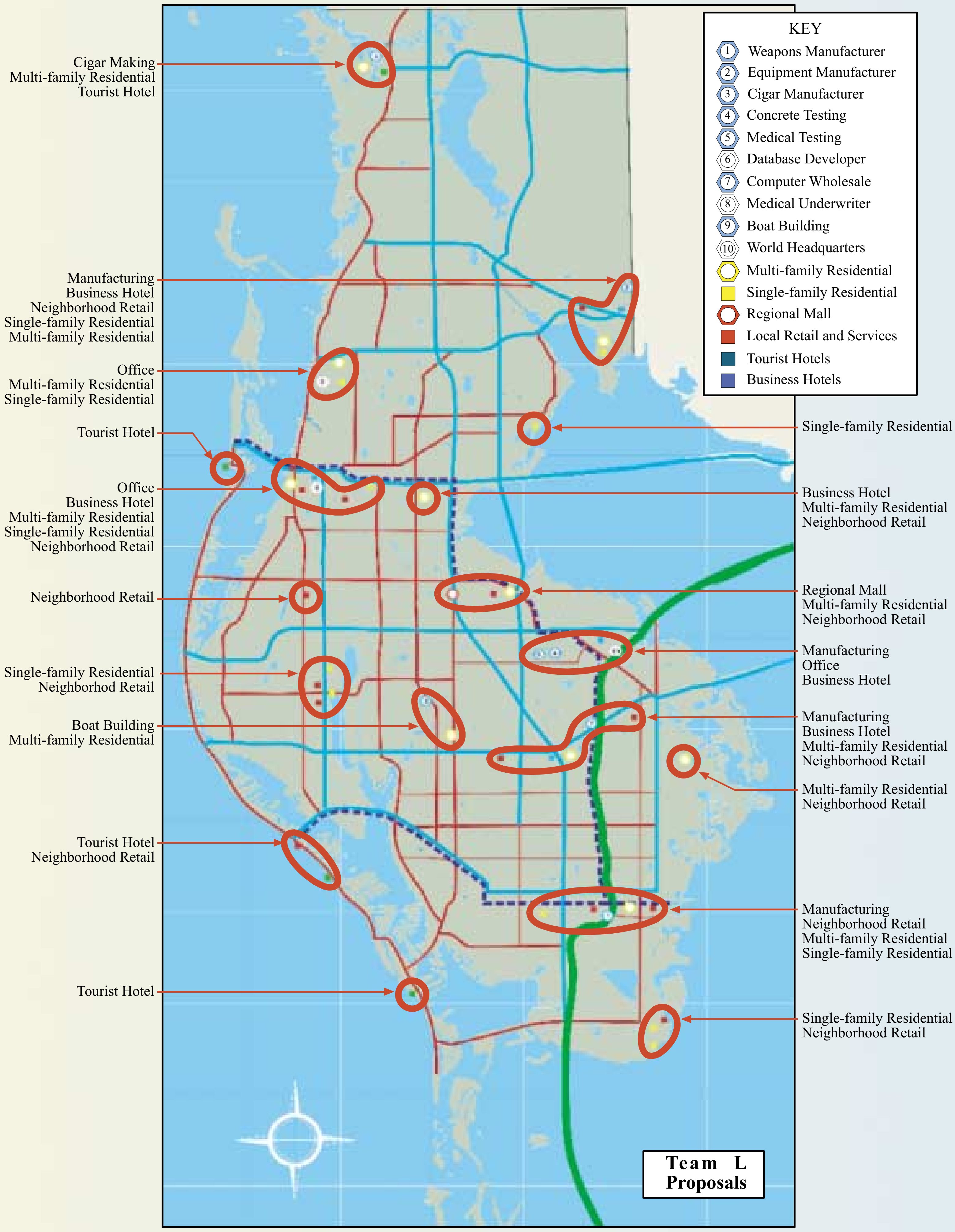
Single-family Residential: Placements of single-family residential development included St. Petersburg at Pinellas Point and west Central Avenue, Seminole, Largo, Safety Harbor, Clearwater, Dunedin, and Oldsmar.

Retail and Services: About 50 percent of the suggested retail and services development was located in proximity to new residential development. Other locations included Pinellas Park, Redington Shores, Gandy Boulevard, and Oldsmar.

Regional Shopping Mall: The Bay Area Outlet Mall site was designated.

Business Hotels: Assigned locations included Oldsmar, downtown Clearwater, the Gateway district, and Pinellas Park.

Tourist Hotels: Assigned locations included Tarpon Springs, Clearwater Beach, Madeira Beach, and St. Pete Beach.



Team M

Team M proposed to create mixed-use clusters in the Clam Bayou area of St. Petersburg, Tyrone Crossings, the Gateway district, both ends of Gulf-to-Bay Boulevard, and Tarpon Springs.

DEVELOPMENT OPTIONS

Primary Employers-Industry: Heavy industry was located in the Gateway district; boat building in the Clam Bayou area in St. Petersburg; the cigar factory in Tarpon Springs; and the computer wholesale in Oldsmar.

Primary Employers-Office: Two of them were located on the east end of Gulf-to-Bay Boulevard and the database developer in the Clam Bayou area in St. Petersburg.

Multifamily Residential: Three clusters were proposed on either mobile home parks or waterfront underutilized industrial property. Locations included the northern end of St. Petersburg, Tyrone Crossings, and the east end of Gulf-to-Bay Boulevard.

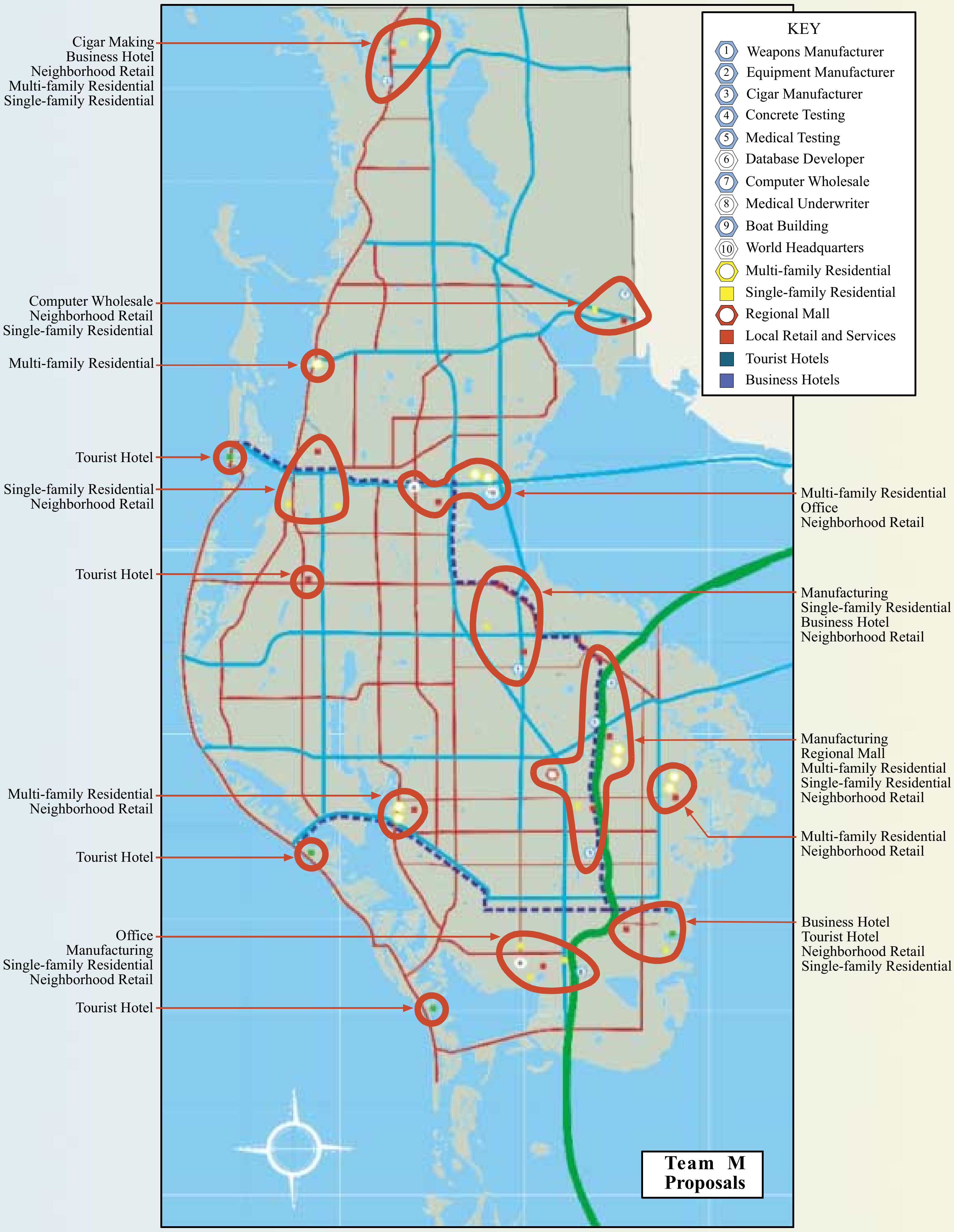
Single-family Residential: Single-family residential was rather uniformly distributed throughout the county, with the larger concentrations in St. Petersburg and Clearwater.

Retail and Services: Retail and services were strategically located adjacent to all residential development in the locations listed above.

Regional Shopping Mall: The Pinellas Square Mall site was designated.

Business Hotels: Designated locations were Clearwater, St. Petersburg, Tarpon Springs, and the St. Petersburg/Clearwater International Airport.

Tourist Hotels: Three of the tourist hotels were placed on the beaches and the fourth one on downtown St. Petersburg's waterfront.



Composite Map and Analysis

Results of the Visioning Exercise

In order to analyze the composite of all contributions to the visioning session, the proposals were examined from two angles: the overall strategy for placement of development, and where and how the development was placed. Likewise, there was a comparison of the location for each development type. Both analyses were cross-referenced to determine if significant development patterns were found that could be used as a basis for a long-term approach to redevelopment.

Placement of Development: There are well-defined clusters of development that tend to repeat in several team proposals including Tarpon Springs, Oldsmar, Palm Harbor, Dunedin, Safety Harbor, Clearwater Beach, downtown Clearwater, the east end of Gulf-to-Bay Boulevard, Largo, Seminole, Pinellas Park, the Gateway district, the I-275 and Central Avenue corridors, downtown St. Petersburg, Gulfport, and the beaches. Development tended to be placed in the denser areas of the county, on major arterials, and along the proposed monorail alignment. Little or no development was placed on the U.S. 19 corridor north of Gulf-to-Bay Boulevard.

Development Options: For the various development options, the distribution of uses mirrored general patterns.

Primary Employers-Industry and Office: Primary employment, both industrial and non-industrial, was concentrated in Tarpon Springs, Oldsmar, Dunedin, downtown Clearwater, the Gateway district, the Young-Rainey STAR Center, Ulmerton Road, and downtown St. Petersburg.

Multifamily Residential: Multifamily residential development occupied mostly dense areas including downtown sites, the waterfront, along the monorail corridor, and following arterial roads. Some teams made explicit efforts to locate this type of development within a quarter-mile radius of primary employment generators.

Single-Family Residential: Single-family development was loosely placed throughout the county. In some instances, development was placed in dense areas of Clearwater, Tarpon Springs, Oldsmar, and the Central Avenue corridor in St. Petersburg. Generally, single-family development was placed in isolated locations, though still complying with the requirement of the eight-mile distance from a primary employer.

Retail and Services: In most instances, retail followed residential development; however there were placements independent from proposed development, most certainly as a means to satisfy unmet demands in already established residential areas. The larger concentrations were in Tarpon Springs, Palm Harbor, Oldsmar, Dunedin, Safety Harbor, downtown Clearwater, the east end of Gulf-to-Bay Boulevard, Largo, Pinellas Park, Seminole, and the Central Avenue corridor in St. Petersburg.

What Do the Results Tell Us?

In analyzing the collective results of all thirteen maps it became clear that their final form, to a large degree, was dictated by how each team assessed the importance of locational factors within the county and the weight that each team gave to potential change elements (e.g., the planned mobility initiative). In addition, the location of "favored" industries (high-wage employment generators) appeared to be significantly affected by the geographical composition of each team.

It was interesting to note that all teams seemed to give significant weight in their decisions to the existing framework of uses currently located within the county. In our opinion, no team advocated mass changes that would significantly affect the existing character of a neighborhood or community. Possibly the current land use that received the most attention from the majority of teams was mobile home parks. Some teams saw these areas as opportunities for revitalized and higher density housing; others as a place to accommodate office uses; while still others as industrial expansion areas when located adjacent to existing industrial parks and uses.

By design, very limited information was given to each team concerning the exact nature of the eleven primary employers. This was done, in part, to simplify the exercise and in part, to see what stereotypical conclusions might be drawn by the teams based upon the name and brief descriptions given. For example, most teams naturally assumed that the boat manufacturing facility would be best located near the water or with water access. In reality, the manufacturing of boats is little different than any other large manufacturing commodity and relies very little on proximity to water or water access. In fact, proximity to rail and adequate surface transportation is far more important. This emphasizes the need for a thorough understanding of any industry that the county desires to recruit prior to initiating that effort.

It was clear that two camps developed concerning reliance on the potential future elevated mass transit system. Those who believed that this system would become a reality typically placed significant growth potential in and around planned transit stops. For those groups, this caused the majority of redevelopment to be placed in central and south county. Those groups who placed less importance or reliance on the system tended to distribute their new growth more equally between north, mid, and south county.

Tourist hotels were placed in beach communities, reinforcing the current mix, within major downtowns, or at gateways to the county. Business hotels logically tended to be placed along major thoroughfares within short drive distances to large primary employers.

Expansion or intensification of retail and service uses tended to be clustered around existing retail nodes and within downtown areas. There was recognition, however, of defined retail corridors that have become linear retail nodes, providing a variety of retail and service uses.

Recommendations for residential revitalization or redevelopment tended to follow mobile home and older housing opportunity areas as provided on the base map.

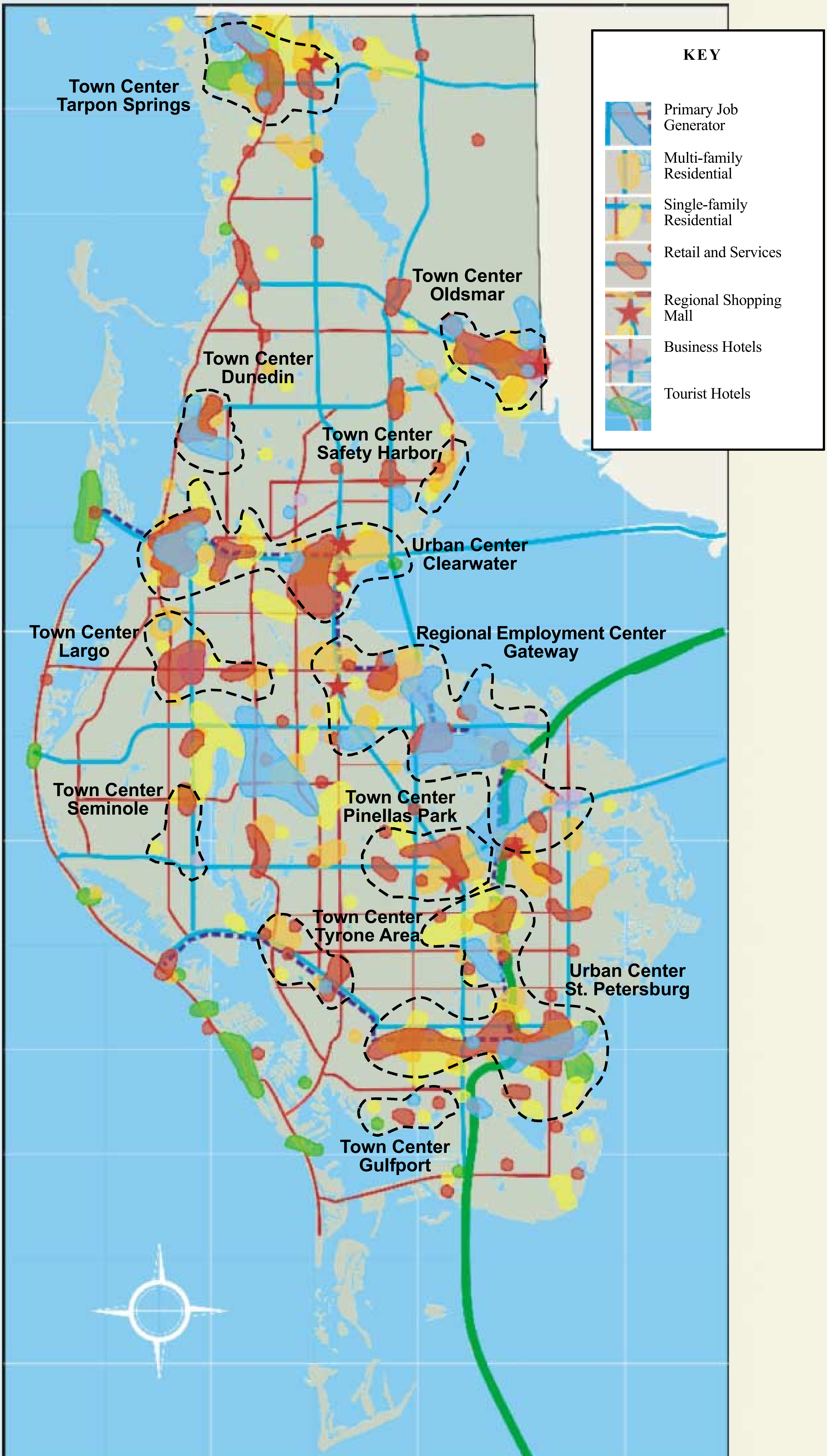
Finally, a number of other interesting points emerged:

- The participants exhibited an unusually profound knowledge of the entire county.
- There is an interest for mixed-use development.
- There is a general acceptance of redevelopment of central county areas.
- There is a general acceptance of combining land uses that had not been considered before, such as introducing multifamily residential development in the Gateway district, particularly in the Carillon area.

In summary, the exercise general produced predictable, but revealing, results. Those groups with strong local leaders or participants directed new businesses to their jurisdictions. The importance of the potential elevated transit system in directing growth became very obvious. Mobile home parks became the primary target for housing redevelopment. And we believe most importantly, all groups showed great respect for the county's current development patterns by not recommending wholesale changes in areas of stability.

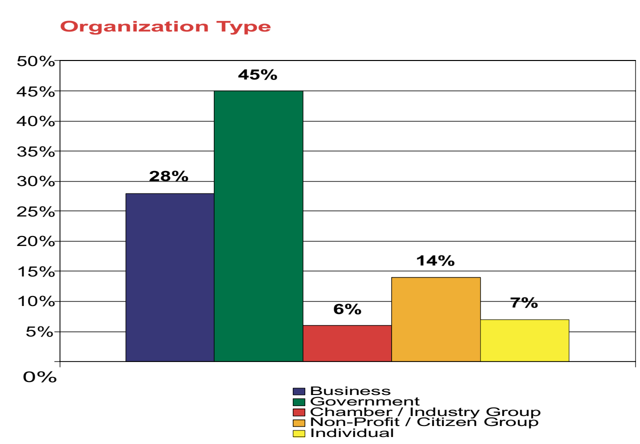
Overall, from the Summit came a sound basis for exploring the land use implications of redevelopment in the areas most favored by the community. In the next phase of the redevelopment effort, selected locations, based on the community's preferences, will be used to prepare prototypical development scenarios, accompanied by representative implementing strategies and techniques.

Composite Map

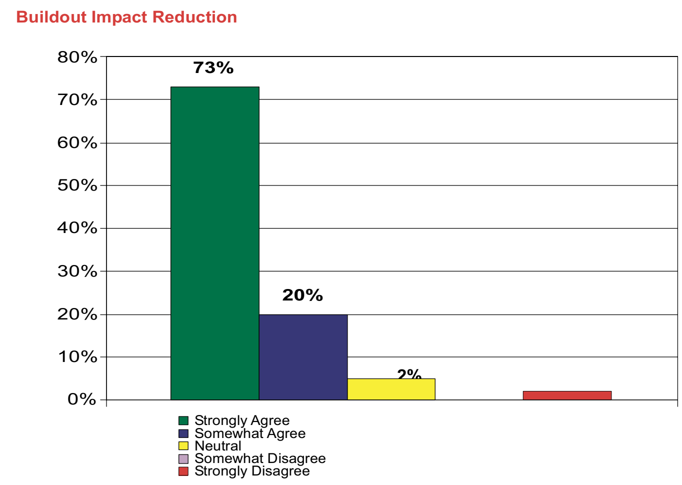


Survey Results & Participants Comments

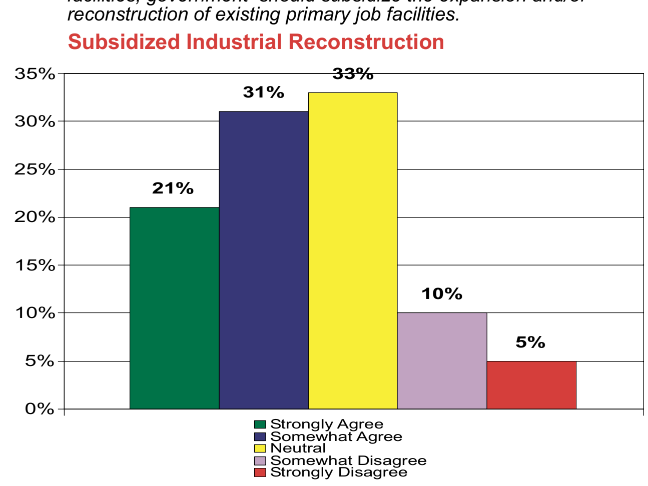
Organization you represent.



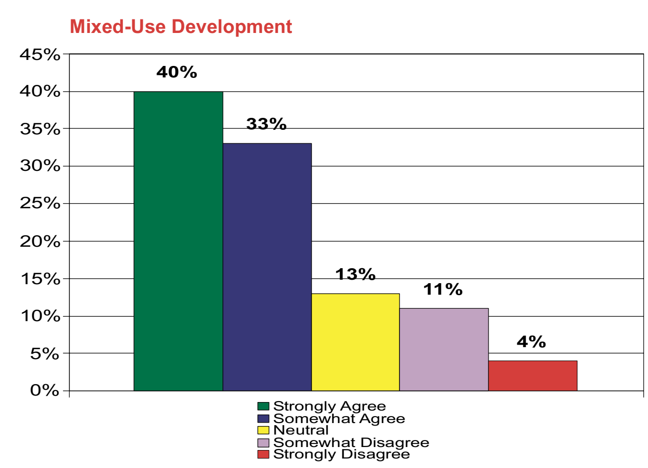
Question #1
As the county will likely begin to have a significant economic decline beginning in 2011 as a result of approaching physical "build-out", the community should actively initiate programs to prevent this decline.



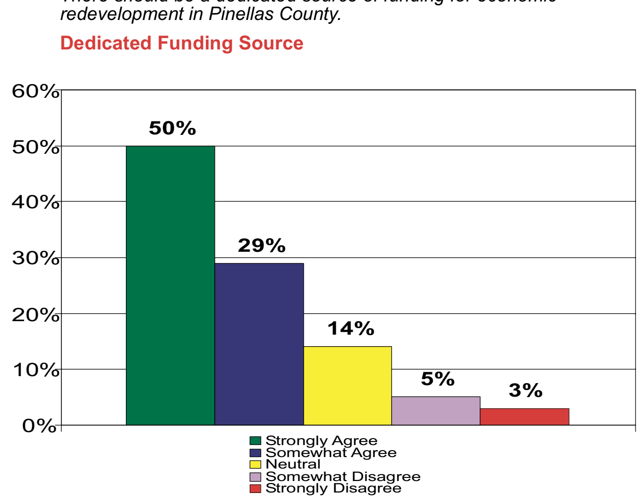
Question #2
Since industrial renovation can be more expensive than building new facilities, government should subsidize the expansion and/or reconstruction of existing primary job facilities.



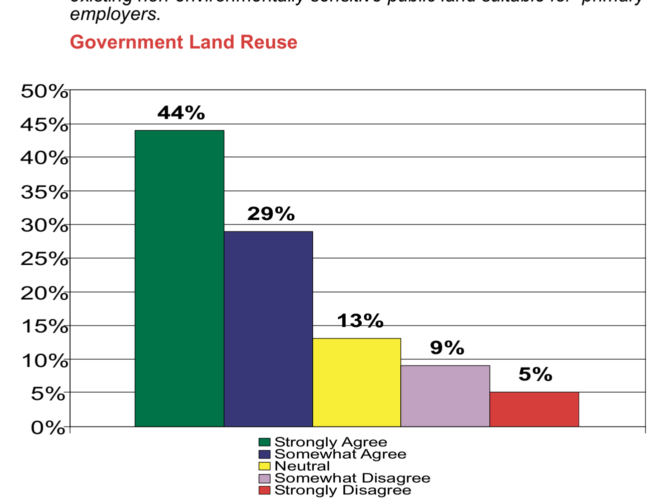
Question #3
We should promote mixed-use development to be integrated with neighborhoods currently zoned residential as a redevelopment/infill strategy.



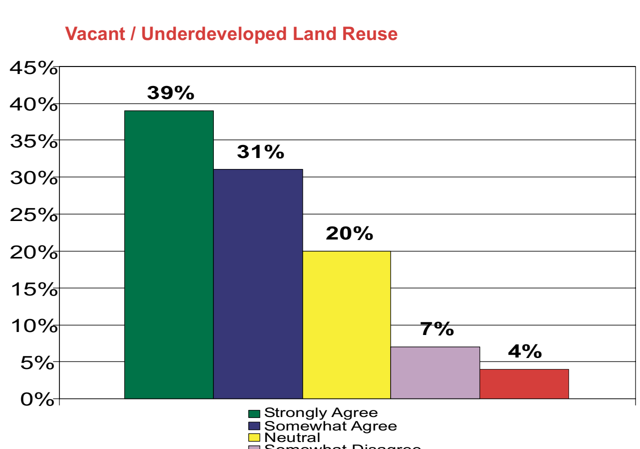
Question #4
There should be a dedicated source of funding for economic redevelopment in Pinellas County.



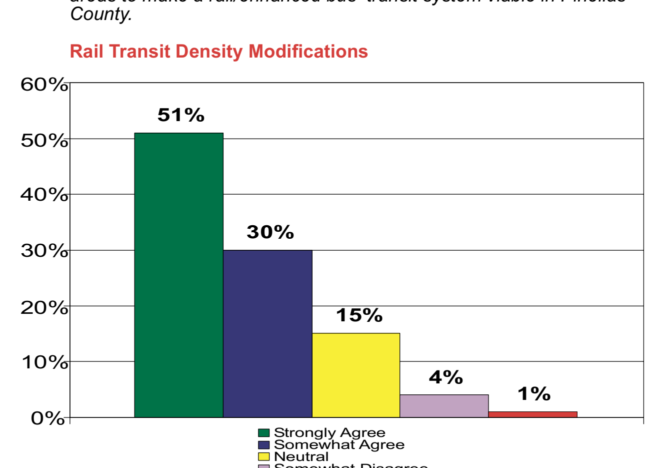
Question #5
To meet a future shortage of industrial and office land, we should identify existing non-environmentally sensitive public land suitable for primary employers.



Question #6
To meet a future shortage in industrial land, we should preserve existing, viable industrial/office designated land from re-designation to other land uses.

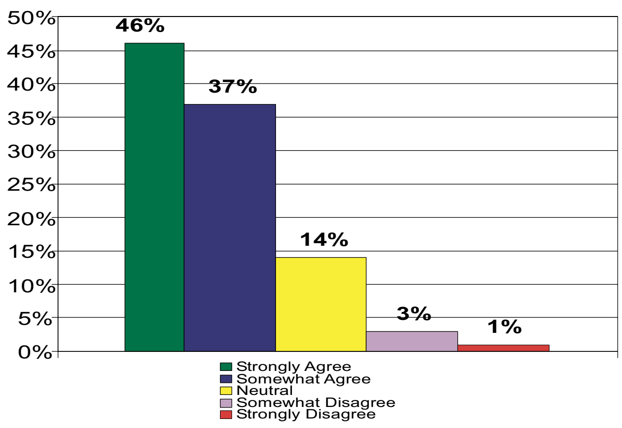


Question #7
Increased density/mixed uses should be allowed in proposed station areas to make a rail/enhanced bus transit system viable in Pinellas County.



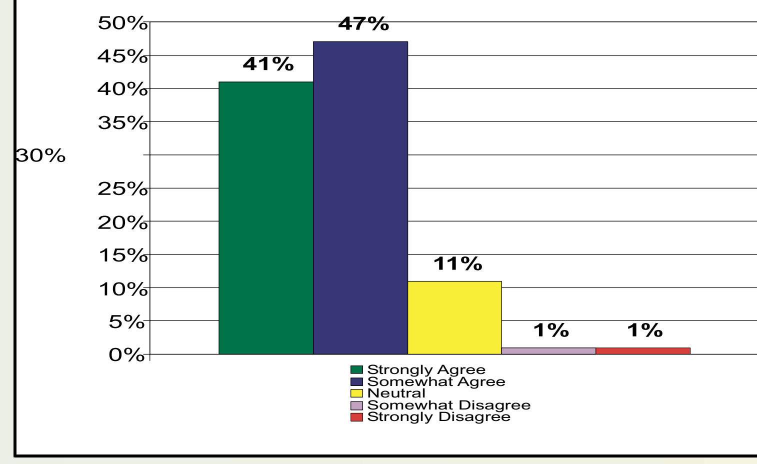
Question #8
Closed shopping malls and strip centers should be re-designated for high-density mixed-use development.

Closed Shopping Malls Re-Designation



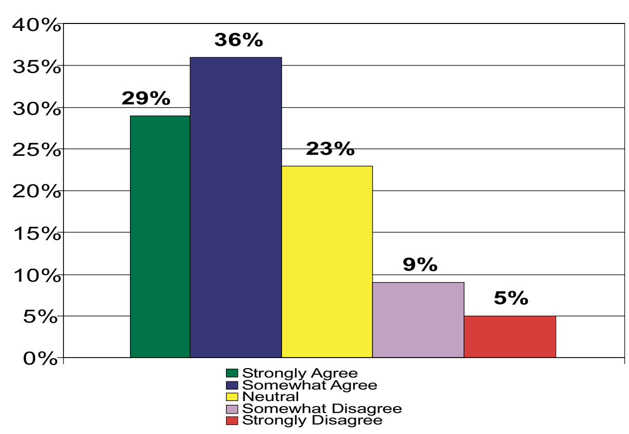
Question #9
Continued growth of the County's primary job base is important, even though some additional congestion and impacts can be anticipated.

Continued Job Growth



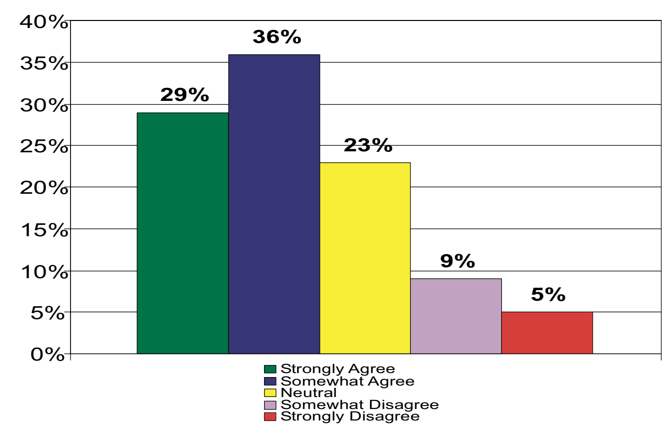
Question #10
Small scale retail and service use development constrained by narrow lot depth should be permitted to expand into adjoining land uses to facilitate redevelopment.

Full-Block Depth Development



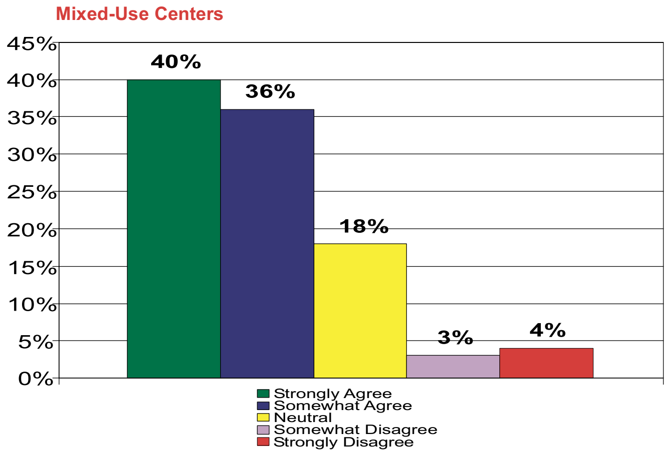
Question #11
If we assume the County has to accommodate an additional 20% to 30% housing growth, the community should support this growth in the form of increased densities.

Increased Densities



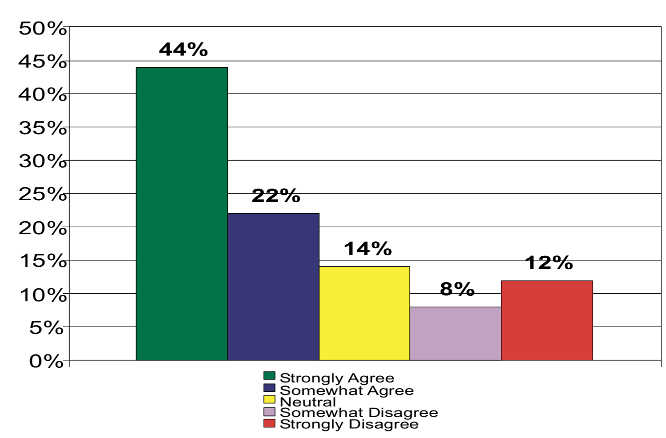
Question #12
As commercial and residential land uses are typically compartmentalized, the community should focus on specific areas throughout the county to create mixed-use centers.

Mixed-Use Centers



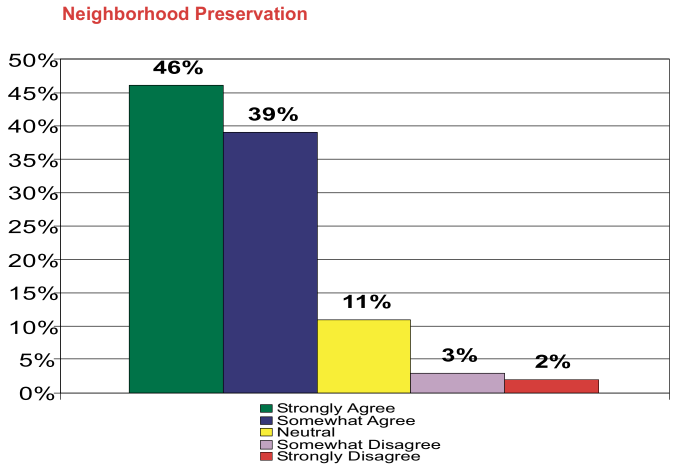
Question #13
Because barrier islands are most susceptible to natural disasters, density increases should be limited to selected redevelopment areas.

Coastal Density



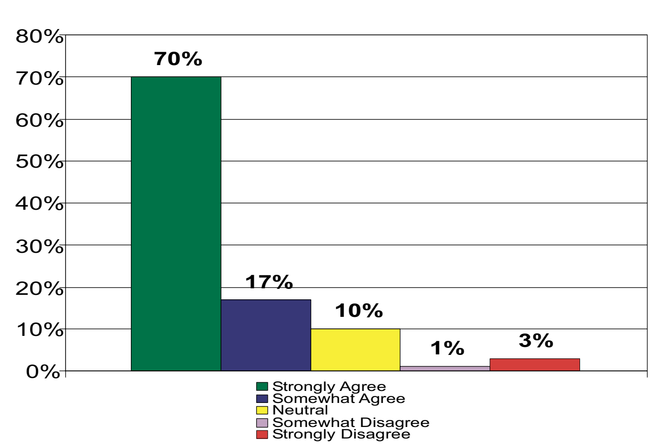
Question #14
We should work to preserve identifiable residential neighborhoods to maintain our current housing stock as an integral component of redevelopment.

Neighborhood Preservation



Question #15
An improved regulatory uniformity and intergovernmental coordination among separate local jurisdictions should be a redevelopment goal.

Intergovernmental Coordination



Evaluation Results

At the end of the Summit, attendees were encouraged to complete evaluation forms and volunteer additional comments and suggestions. Fifty-three surveys were returned with the following results:

Organizations Represented:
- 33% Government
- 28% Business (50% real estate/builder/developer)
- 24% Nonprofits
- 10% Chambers of commerce/industry groups
- 6% Individuals

Location of Organizations:
- 89% Pinellas County
- 11% Other

Summit Ratings (combined "highly satisfied" and "satisfied" ratings):
- 94% Opportunities Summit, overall
- 76% Project overview session
- 87% Lunch program
- 78% Opening/wrap-up sessions

Relevance of Sessions (combined "highly relevant" and "relevant" ratings):

Thursday Morning Sessions
- 88% Economics - Where the Money Is
- 88% Real Estate - Where the Land Is
- 86% Design - Community Patterns

Thursday Afternoon Sessions
- 78% Improve local economy
- 74% Real estate
- 85% Patterns of redevelopment

Friday Morning Sessions
- 71% Panel sessions reports
- 85% Interactive mapping workshop
- 88% Consensus points/opportunities findings

Single Most Important Issue:
- 38% Redevelopment planning
- 21% Economics
- 13% High wage jobs
- 8% Transportation management
- 8% Consistent regulations throughout the county
- 5% Business friendly environment
- 3% Land use/industry focus
- 3% Local government support

Suggestions for a Future Summit (requested for the Spring):
- 47% Volunteered suggestions for a future summit:
- 32% Increased citizen/neighborhood group recruitment and interactive participation
- 16% Transportation focus
- 12% Regulations/permitting process
- 12% Quality of life/environmental issues
- 8% Emphasis on education/training for high wage jobs
- 8% Funding sources for redevelopment projects
- 4% Bring back Bill Fruth
- 4% Eminent domain discussion
- 4% Profitable commercial/residential rentals

Participant Comments

Additional Comments supplied by participants provide a comprehensive summary of Summit results in the words of the participants. 58% of respondents volunteered the following additional comments. Comments are generally favorable and offer thoughtful suggestions on how to better shape the community redevelopment planning process.

- Loved it, gives inspiration to a young builder who didn't quite know what to do when he grew up.
- Great panel! Good network!
- Great networking opportunities – audience was from broad areas of development and redevelopment. Group was solutions oriented.
- High quality speakers.
- Great structure.
- How to implement progress, faster.
- How to unify the 24-26 diverse communities to maximize their leverage in development for residential and business.
- Help cities like Safety Harbor, Largo, Tarpon, and Dunedin develop unique destination centers/zones.
- Help find best location for businesses, prevent them from leaving the county.
- Give cities "tradeable" credits that compensate one city for losing a business while the other city gains that business when it moves.
- Make sure the county never loses a company (of size) to a move elsewhere.
- Need a central "business" bank.
- Businesses create jobs, tax revenues, the need for housing and spurs development.
- Highest and best use concept must be overlaid throughout the county.
- Too many small decisions made on a local basis limit the growth of Pinellas in the future.
- Incentive development of downtown destination zones.
- Must create an environment, which emphasizes action.
- Make good things happen quickly. This will induce more good development because the process is easier and faster.
- There is too much government in the way of progress–governmental processes are not set up to expedite progress.
- Mass transit? A dream for Pinellas? A virtual impossibility?
- Improve communication between cities.
- Incentivize the sharing of resources and services in most efficient way between cities.
- Incorporate more emphasis on quality of life issues and long-range impacts.
- This is great, but local government people just attend to get out of work with no results. Try newspaper ads, more individuals.
- A good beginning! The county development map could be improved.
- What about small businesses, independent real estate investors? Small properties.
- A very informative summit.
- Creating strong, concentrated, identifiable communities will decrease traffic (by dispersing employers), strengthen effectiveness of communities solving their own problems, and increase the attractiveness of the county.
- High density, crime, environment, prevention of encroachment of up-scaled neighborhoods should be discussed.
- Excellent speakers and very well organized presentations. Much information.
- In the exercise the zoning of the county north of Gulf to Bay precluded any "outside the box thinking" re, intersects in north county. Place a business, say in a mobile home area with multi housing to allow mixed-use centers. i.e. land in Tarpon Lake off N. Fl Progress states they can handle the load – can our other items of infrastructure (water) meet the 2000 - 3000 new jobs/year?
- Find a way to get countywide regulatory agencies on board and committed to a redevelopment plan. Review county land use plan – make appropriate changes to stimulate redevelopment and new development.
- Improve historic preservation redevelopment areas.
- Economic Development includes developing homegrown industry rooted in the community. Highly mobile capital that can be lured to our county can be lured away just as easily.
- We need to work to eliminate the provincial attitudes that were prevalent in the Friday exercise.
- Excellent conference. I picked up a great deal. Would like to see something similar specifically for citizens/homeowners association leaders et al. I'd be pleased to volunteer to assist in organizing same.
- Breakout discussions revealed the historical and on going problems of parochial thinking. Jurisdictions need to move away from self serving competition and begin consideration and support for actions that serve the best interests of the county as a whole.
- Forget monorail for foreseeable future. Stop beating up hospitality and retail service jobs. I learned a lot and am glad I came. Mixed use is no panacea. Mobile home parks are not now land in waiting universally. Consolidation is a panacea.
- Lack of attendance throughout meeting by commissioners and staff indicate a general "lip service" only to their participation.
- Would like to see more about saving large shade trees as we redevelop.
- Great opportunity for government and business to communicate – each needs to give something to support these efforts.
- Consider summit format for other countywide issues where consensus among private, public resident interests are needed e.g. water, transportation
- Present the big picture in regional basis besides St Pete: North County, Clearwater and Largo.
- It has been a huge wakeup call. Really enjoyed all presentations, especially the economics. Karen Seel has great vision and is able to bring groups together to solve issues. Impressive!
- Other important issues: How to do incentives so that they go to employers, not property owner. How to get public support for increased densities. How to replace mobile home parks. Bill Fruth was excellent! Dutter and Moore also good.
- Great beginning.

Conclusions and Next Steps

Summit Consensus and Follow-Up

The participation and ideas generated through the Opportunities Summit process have established a strong foundation on which to build the *Economic Development and Redevelopment Plan for the Pinellas Community*.

The information prepared for and discussed at the Opportunities Summit yielded consensus that there is a need to develop specific strategies to deal with the economic, real estate, and urban design challenges of redevelopment. The initial phase of work also pointed out the need to address intergovernmental strategies and development regulations as part of the plan effort. It was also suggested that an additional, interim summit in mid-2003 should be conducted to explain and test plan strategies prior to preparing plan details.

Based on the results of the Summit, a follow-up work program has been devised and is set forth below.

Preparing the Economic Development and Redevelopment Plan for the Pinellas Community

The objective of the plan is to unlock, and set direction to achieve, the economic, real estate, and quality of life opportunities identified through the Summit process. The proposed approach to the preparation of the plan is directed at achieving our vision of *Pinellas - A Community of Quality Communities* illustrated in the accompanying diagram.

Beginning with the results of "Phase A" which culminated with the Opportunities Summit, the preparation of the plan will include the following principal components.

Economic Objectives - Based on the economic analysis and projections unveiled at the Opportunities Summit, specific economic objectives, incentives, and implementation strategies and monitoring techniques will be developed.

Real Estate Objectives - Real estate objectives will be developed to form the basis for both public and private real estate strategies and models for major land use types. Specific potential redevelopment typologies will be identified and linked to potential incentives.

Intergovernmental Objectives - The complexities and need to address organizational structure will be assessed, including linkage to the Pinellas Assembly process, in order to identify public policy strategies consistent with the objective of achieving a market motivating plan.

Urban Design and Code Objectives - Identify and develop design and regulatory objectives, and from those objectives, specific design and regulatory techniques that will serve to organize and stimulate code changes directed at facilitating and achieving the redevelopment strategies.

Policy and Strategy Summit - This interim summit is designed to report on the progress made by identifying the foregoing objectives and strategies necessary to achieve them, and to provide an opportunity for citizen evaluation and input prior to developing the draft plan.

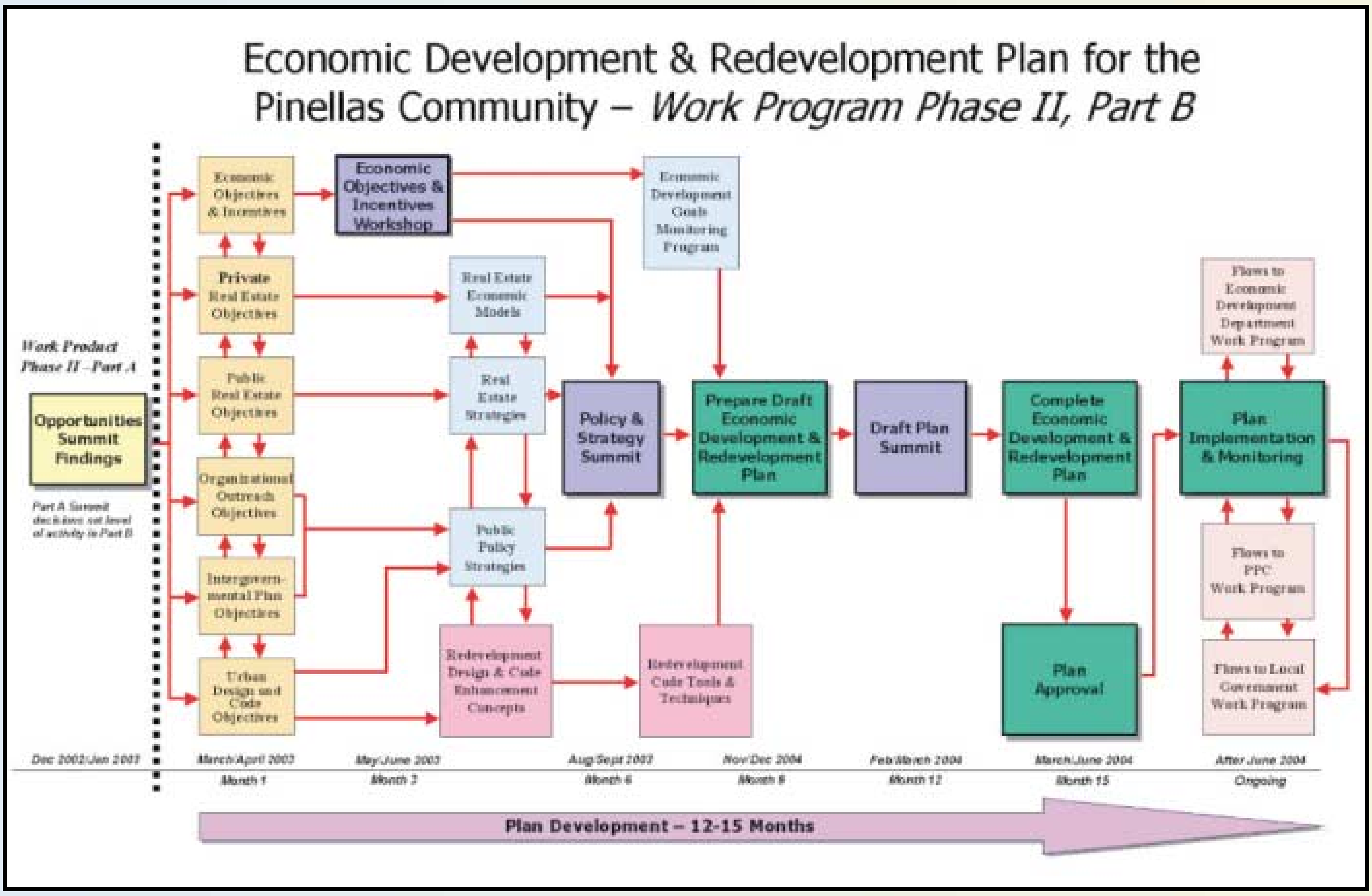
Plan Draft and Summit - Based on the input received at the Policy and Strategy Summit, the full plan document will be prepared, including provisions for its formal consideration and implementation, as well as follow-up means of monitoring and assessment.

Finalize and Adopt Plan - The draft plan reviewed and considered at the Draft Plan Summit will be finalized and considered for formal action as is determined appropriate.

Implementation and Monitoring Activities - Responsibilities and recommendations for implementation and subsequent monitoring activities identified as part of the plan will be determined and initiated.

Summary

The work program outlined above, to be undertaken over the next twelve to fifteen months, is an ambitious undertaking that will require considerable commitment and leadership from all of the participating parties – elected officials, government staff, business and development leaders, and the citizenry from throughout Pinellas County. If developed with the same level of enthusiasm, hard work, and sense of cooperation as the initial effort witnessed in the Opportunities Summit phase, it will successfully produce an economic development and redevelopment plan that will help assure the future of Pinellas as a community of quality communities.



Why Are We Doing This?

Snell Arcade Building, St. Petersburg

There is a recognized need for policy-makers and the citizens they represent to come together and set direction for the post build-out redevelopment of Pinellas County. The future economy, fiscal condition of government, and the quality of life for all our residents and visitors can be secured and improved by directing the redevelopment process as opposed to just letting it happen. The process that we are engaged in is a unique, prototypical one that seeks to anticipate the potentially negative affects of buildout and stagnation and define a desired future in terms of jobs, investment, and community building for a prosperous and dynamic county with multiple jurisdictions.

What Will Be Produced?

The proposed end product will be the *Economic Development and Redevelopment Plan for the Pinellas Community*. This will be a first ever attempt to define how we want to evolve as a county through the redevelopment of our built environment over the next century. The goal is to be creative and forward-thinking in defining the kind of communities we want to encourage in terms of jobs, housing, transportation, leisure activities, sense of place, and the preservation of our natural and man-made features.

Who Will Be Doing It?

The process has been organized as a community-based effort that will build on and utilize the work of the local jurisdictions to define the objectives and strategies of this countywide approach. It is founded on a structured community and leadership commitment to a common vision for all of Pinellas County. Participants include interested citizens, business and development interests, elected officials and government staff, whose combined efforts will be coordinated by a consultant team with specialized expertise. In brief, it is an open, participatory process that welcomes the input of all, and its success will depend heavily on a cooperative, consensus-building approach.

When Will It Get Done?

The first phase of this process, "Phase A," that led up to and culminated in the Opportunities Summit and this report, took place over the past six months. The follow-up phase, "Phase B," is projected to be carried out over the next twelve to fifteen months – to be completed by mid-2004. The schedule anticipates an interim Policy and Strategy Summit in mid-2003 and a second Draft Plan Summit near the end of 2003 prior to plan finalization and approval. In short, the *Economic Development and Redevelopment Plan for the Pinellas Community* should be complete and ready to initiate implementation by mid-2004.

How Can You Be Involved?

Everyone is welcome to participate. You can express your views and input by contacting any member of the Steering Committee, your elected officials, or municipal or county staff. Stay apprised of progress on the plan through the media, including government access television, and the county's Economic Development Department web site at ***www.siliconbay.org***.

There will be on-going discussion of the issues and strategies at the local level in which you can participate. You can submit any recommendations to the web page address noted above and there will be opportunities to participate directly in the two public summit forums scheduled over the next year.

The process has been designed to incorporate the input and ideas of those who choose to participate. The ultimate success of the effort will depend on positive, community-based participation that results in a common vision for the future of the county as a whole.

Clearwater Beach, Clearwater

MANAGEMENT TEAM

Stephen M. Spratt, Pinellas County Administrator

Jacob Stowers, Assistant Pinellas County Administrator

Richard “Buzz” David, Director, Pinellas County Economic Development Department

Brian Smith, Director, Pinellas County Planning Department

David Healey, Executive Director, Pinellas Planning Council

CONSULTANT TEAM

Prime Interests, Inc. - Richard Gehring, Principal

POLICOM Corporation - William Fruth, President

Dutter Design and Consulting, Inc. - Richard Dutter, President-Owner

HDR Engineering - James Moore, Community Design Principal
and Ignacio Correa-Ortiz, Community Design Manager

REDEVELOPMENT OPPORTUNITIES SUMMIT

For the Pinellas Community