

Strategies & Policies Summit

Survey Results

Technical Memorandum



January 9, 2004

**Strategies & Policies Summit
Survey Results**

Technical Memorandum
January 9, 2004



Prepared For:

Pinellas County Planning Council
and the
Pinellas County Economic Development Department

Prepared By:

PRIME Interests, Inc.
748 Broadway, Suite 202
Dunedin, Florida 34698

In association with:
HDR, Inc.
Policom, Inc.
Land Solutions, LLC
Real Estate Research Consultants, Inc.

Table of Contents

<u>Section</u>	<u>Title</u>	<u>Page</u>
1.	Introduction.....	1-1
2.	Target Employers and Incentives Section	1-2
3.	Market, Real Estate, Housing Strategies Section	1-9
	Government Criteria	1-9
	Land Criteria.....	1-16
4.	Urban Design and Regulatory Codes Section	1-25
	Regulation Criteria.....	1-25
	Urban Criteria	1-32
5.	Summary Conclusions	1-37
	Appendices	1-39
	A – Survey Participant’s Information	
	B – Tabulated Data Results	
	C – Miscellaneous Important Issues Summary	
	D – Map Series	

1. Introduction

On October 24, 2003, participants at the Redevelopment Strategies & Policies Summit for the Pinellas Community were encouraged to complete evaluation forms and volunteer additional comments and suggestions by responding to the meeting workbook survey questions or statements. Responses were tabulated and are presented within this technical memorandum to provide additional guidance in the creation of the *Economic Development and Redevelopment Plan for the Pinellas Community* project.

The limited number of responses does not represent a scientific sample of the community. However, it does represent input from an interested population group that was presented technical information in a concise workshop format who based their responses upon the data presented and their background expertise. Responses to the survey questions or statements were organized by the three major areas of emphasis that correspond to the divisions of the *Economic Development and Redevelopment Plan*:

- Target Employers and Incentives Strategies;
- Market, Real Estate, and Housing Strategies; and
- Urban Design and Regulatory Codes Strategies.

Respondents were asked to identify their level of support by answering the survey questions on a 5-point scale ranging from “Most Important” to “Not Important.” This technical memorandum describes the survey results using both narrative and charts to relate the general importance or implications of the questions or statements and the overall response to the redevelopment plan development project. The following general observations concern the survey and responses:

- Of the total 78 responses, 77 of the respondents resided within Pinellas County.
- Forty-four percent of the respondents represented government organizations.
- Twenty-eight percent of the respondents represented businesses.
- A total of sixty-six questions were included in the survey.
- The opportunity for write in comments was provided.

Survey results were tabulated and analyzed to determine their implications within the three major areas of emphasis. Each question/statement has been identified by the highest to lowest response ranking for its cumulative “Most Important” and “Somewhat Important” responses. These cumulative responses depict a level of consensus on the issues and should help guide plan development. As response percentages decrease, fewer points of agreement can be identified. The bar charts are arranged from highest to lowest response. High “Neutral” or “No Opinion” responses (those exceeding 20% of total response) are noted, and they may require additional education or analysis during plan development.

Each question has been reviewed in light of its intent and the ultimate importance or implications for plan development. The questions are arranged from highest to lowest positive response. Where multiple questions or statements have an equal cumulative total response score, they have been assigned a letter sequence (e.g., 7a, 7b, 7c, etc.).

2. Target Employers and Incentives Section

The purpose of questions or statements addressing the granting of business incentives was to determine the acceptability of providing them and, if acceptable, the amount and type of incentives that should be offered. From a review of the data, three issues ranked much higher in importance than all others:

- The percentage wages paid by the company exceed the area average wage;
- The company should be “contributory” in nature; and
- The number of jobs created by the company.

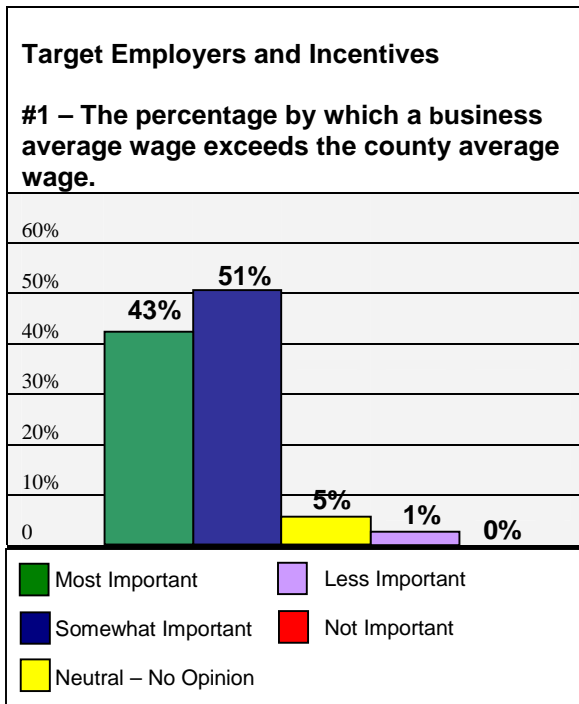
It can be inferred from the responses that the respondents favored larger projects over smaller ones. In reality, most projects will be small ones. However, the positive economic impact can be just as great with several smaller projects as with a single larger one.

The respondent group seemed to favor providing incentives to new companies moving to the county over providing them to existing companies. This perspective may result from legitimately questioning whether an existing company will actually move out of the area if it does not receive an incentive or if the company is “bluffing” by threatening to leave.

Regarding the type of incentives to be offered based upon the “quality” of the project, the group wanted to offer very few incentives to marginal projects. Of the various incentives that could be offered, “Regulatory Relief” ranked the highest for a “low impact” project, but still it only received a 28% approval rating.

On the other hand, the group wanted to offer “high impact” projects more incentives. More than half the group favored offering 1) cash grants for the purchase of land, 2) low interest loans and cash grants for equipment, and 3) property tax abatement. The information gleaned from this exercise will assist in creating the priority impacts for the “business incentives matrix” being developed.

The following bar charts depict the survey responses by question or statement and their intent and implications for plan development. The *Target Employers and Incentives* section addresses the characteristics of a contributory employer so the responses represent the importance of a series of characteristics. From this ranking, the application of incentives to be considered for contributory employers will ultimately be developed in an incentive matrix.

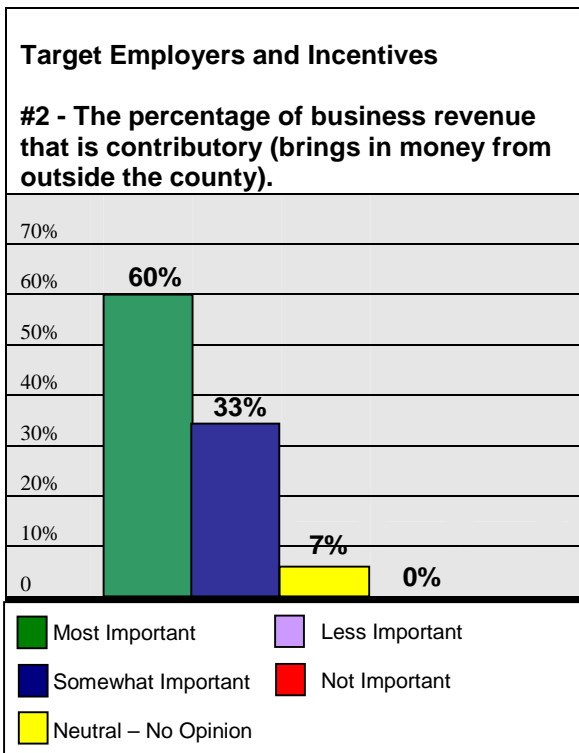


INTENT –

- The jobs creation goals have target income levels and are adjusted up over time. The percent of wages exceeding the county average has a positive economic impact in Pinellas County.

PLAN IMPORTANCE / IMPLICATIONS –

- It is necessary to improve the “quality” of a local economy by attracting high wage primary, contributory industries or businesses into an area.
- The targeted industries are “high-skill,” “high-wage” businesses, which will pay a wage much higher than the area average and should be given favorable consideration over “low-wage” businesses.

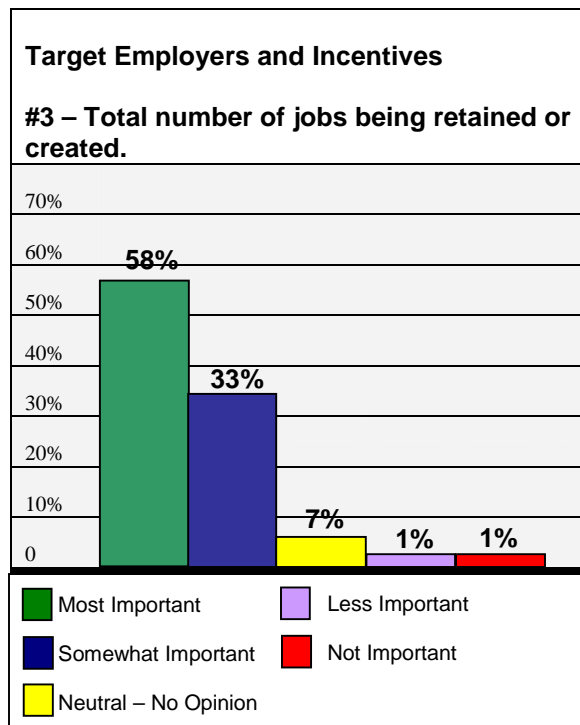


INTENT –

- The higher the contributory impact, the more money a local economy has, and therefore, the greater the economic impact.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should support the primary, contributory industries that sell goods or services outside the area.
- In most economies, 10% to 15% of the businesses and 20% to 25% of the workforce are engaged in primary, contributory businesses.
- Since the growth of the local economy is dependent up the success of the contributory businesses, only those should be considered for incentives.

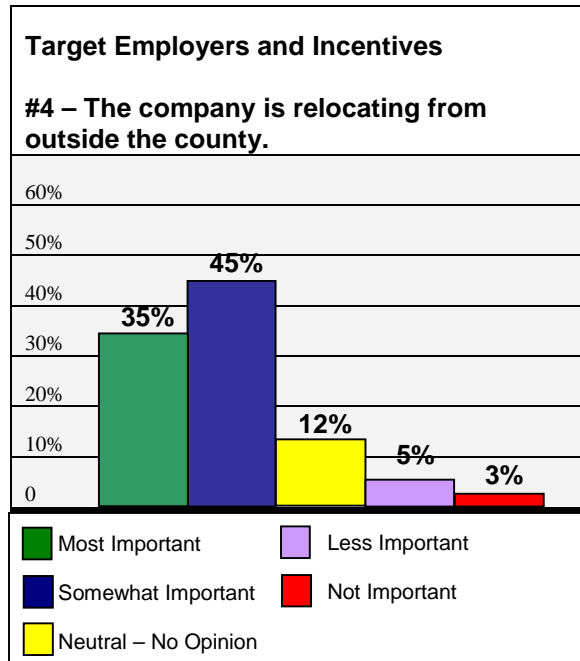


INTENT –

- The size and quality of the economy changes as the contributing jobs expand or contract. The total number of contributory jobs needs to grow to provide growth in the economy.

PLAN IMPORTANCE / IMPLICATIONS –

- For the economy to improve, the area needs to have a net gain of approximately 2,700 new, primary jobs per year for the next 20 years.
- New jobs will help preserve existing service/retail jobs and cause the creation of new opportunities for residents.
- Incentives should be targeted to reward the number of jobs created by a business that helps reach the annual employment goals.

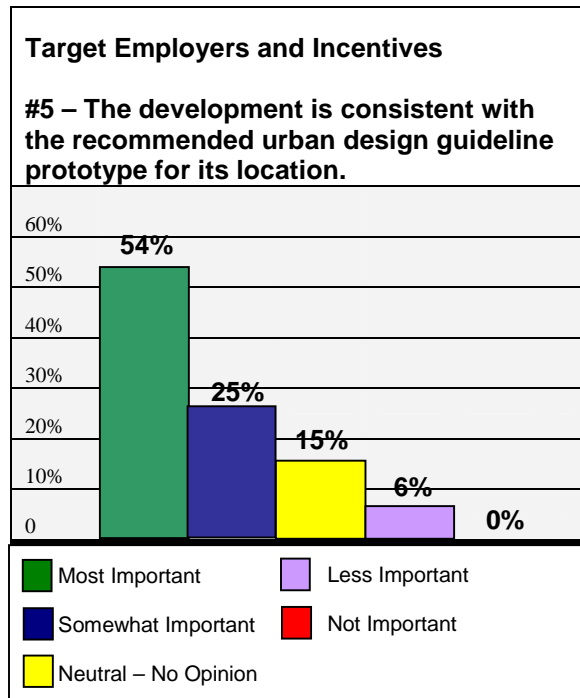


INTENT –

- Strong economies have diversified primary industries.

PLAN IMPORTANCE / IMPLICATIONS –

- By attracting new companies, the county will have the opportunity to increase its economic diversification.
- The 80% “Positive” response to this issue places new business attraction above retention/expansion (71%) in importance, but both are critical.
- The plan would need more land for attraction efforts where retention can provide recycled sites and growth of new facilities (Nielsen Media Research model).

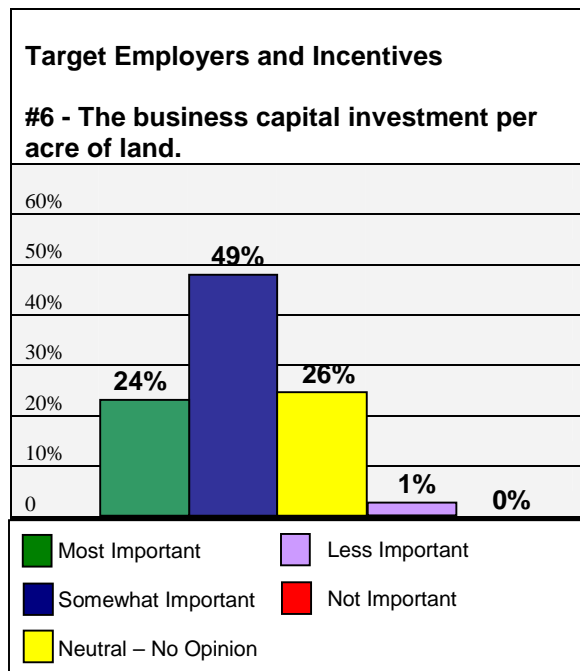


INTENT –

- The plan will identify employment centers of various types and encourage job location where growth and job expansion is desired.

PLAN IMPORTANCE / IMPLICATIONS –

- Plan employment centers will be receivers of most job expansion and attraction opportunities, but not the only areas.
- Ability to recycle sites and structures should be encouraged and be made part of the incentive mix.
- A development that encourages transit and meets other plan goals will also produce other positive impacts.

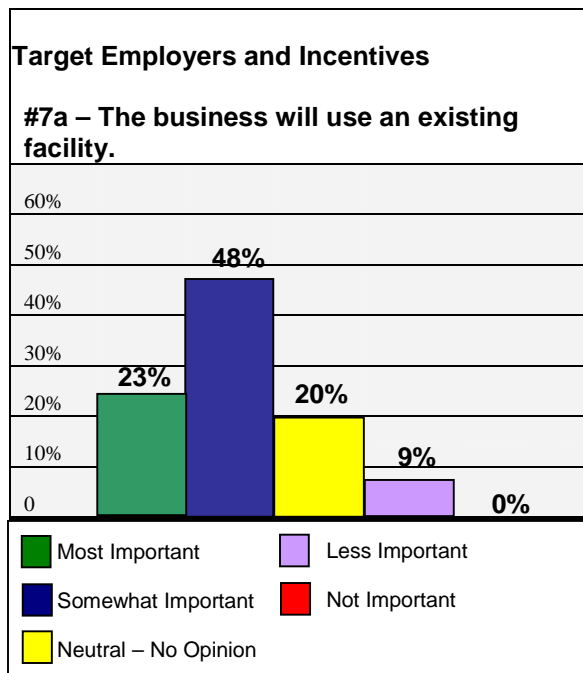


INTENT –

- The impact of capital improvements is a positive indicator and there is a direct correlation to the viability and quality of the attracted business.

PLAN IMPORTANCE / IMPLICATIONS –

- The impact of the project in dollars per acre is an indicator of land utilization in a county with limited land resources.
- The relationship between investment and land size is a measure that identifies the most important resources for the most valuable employers.
- Projects with high capital impact should get priority for incentives.
- The high “Neutral – No Opinion” response (26%) may mean additional education or plan analysis is needed.

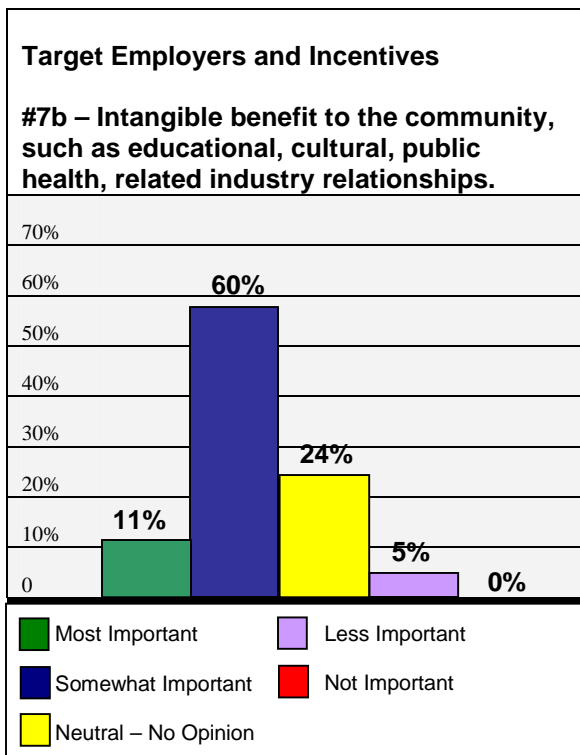


INTENT –

- The ability to recycle an existing site or facility will result in a resource allocation benefit and efficient use of land without further absorption of vacant land.

PLAN IMPORTANCE / IMPLICATIONS –

- Site recycling will use formerly-developed land that will not consume vacant land or have a negative area impact.
- Site recycling reinforces the selected area and attracts development investment.
- Existing infrastructure will be better utilized and encourage additional capital investment.
- 71% “Positive” response shows an understanding of recycling opportunities.
- The high “Neutral – No Opinion” response (20%) may mean additional education or plan analysis is needed.

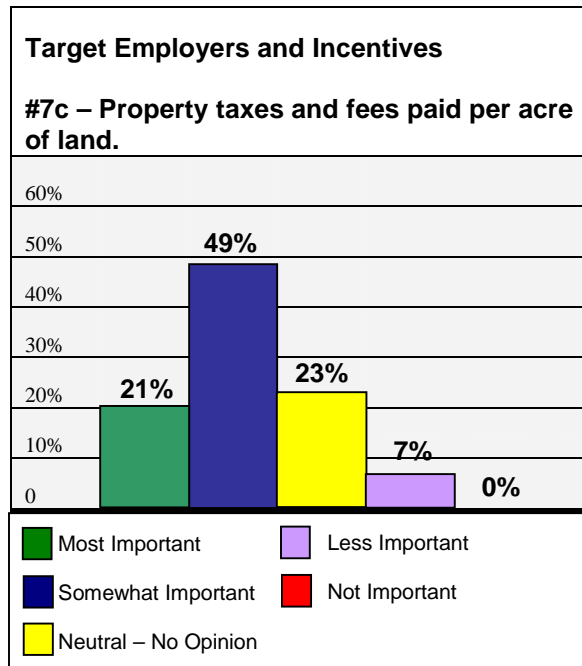


INTENT –

- There are types of employment that complement or reinforce existing industries and institutions such as medical research or high tech design facilities, and concentrations of people with high tech expertise moving into the area provide intangible benefits to the community.

PLAN IMPORTANCE / IMPLICATIONS –

- Target employers stimulate activity in secondary employment sectors.
- Focusing on stimulators will have strong secondary impacts.
- Education relationships can have major public investment impacts.
- The high “Neutral – No Opinion” response (24%) may mean additional education or plan analysis is needed.

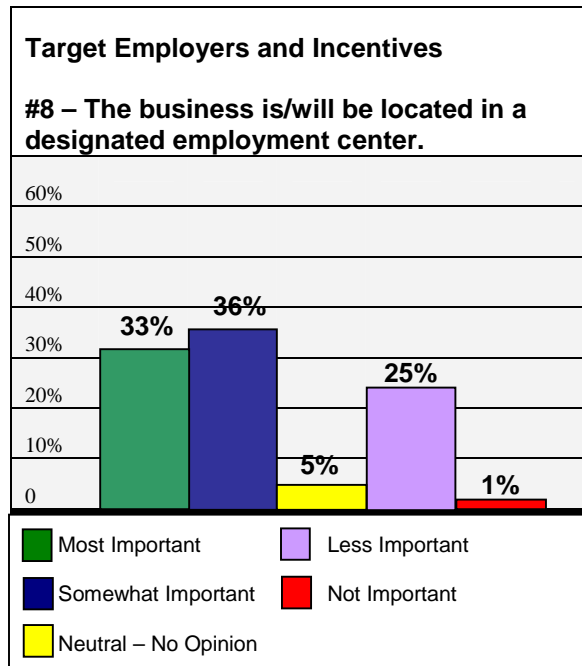


INTENT –

- The cumulative annual impact of project taxes and fees is the long-term positive economic benefit that justifies incentive programs.

PLAN IMPORTANCE / IMPLICATIONS –

- High tax rate values on leased land will be key in land allocation.
- Tax incentive programs for a start up period are justified.
- If taxes and fees are lowered as incentive, the revenue loss should be offset by the cumulative positive impact.
- The high “Neutral – No Opinion” response (23%) may mean additional education or plan analysis is needed.

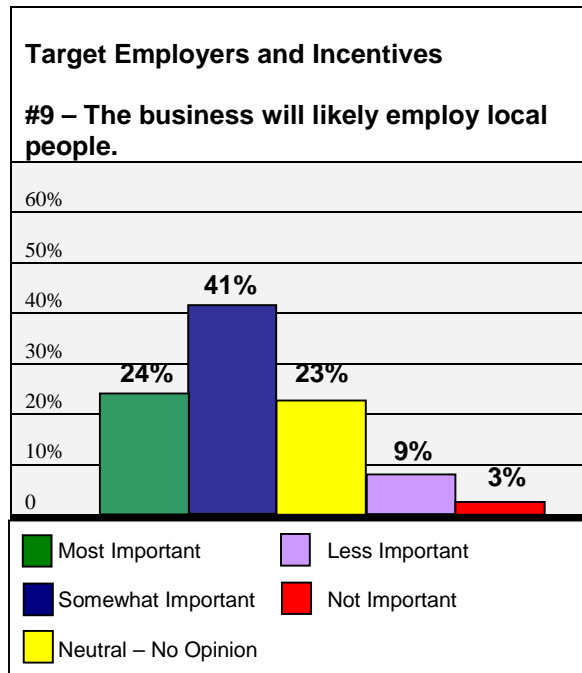


INTENT –

- Determine if employment center locations are to be the primary receptors for new job creation.

PLAN IMPORTANCE / IMPLICATIONS –

- The “Positive” response is weak at 69%.
- The 26% “Less Important/Not Important” response shows openness to more flexibility in facility location in and outside of employment centers that is consistent with existing contributory business location field conditions.
- Larger employment centers are more important for governmental decision-making than privately-developed site location decisions.

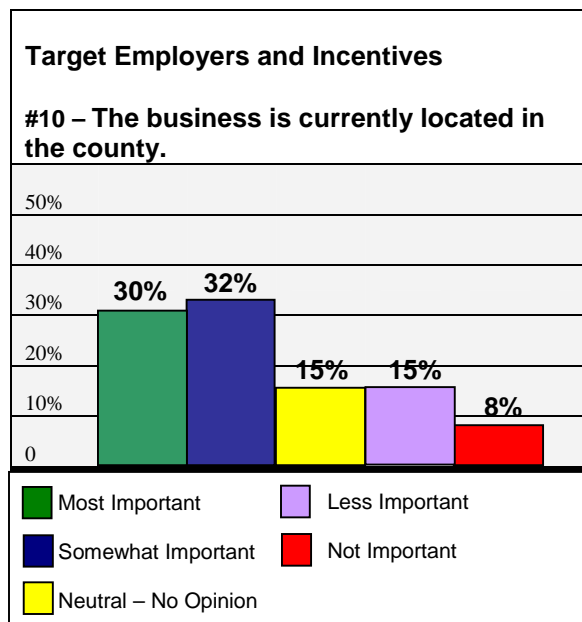


INTENT –

- Determine if new employment attraction is more motivational than providing employment for the existing population.

PLAN IMPORTANCE / IMPLICATIONS –

- The next to lowest “Positive” rating (65%) says, “get the new employees and do not concentrate on local employment needs.”
- The local underemployed number is not motivational.
- We have lower unemployment than the national average.
- The high “Neutral – No Opinion” response (23%) may mean additional education or plan analysis is needed.



INTENT –

- Determine the importance retention of existing employers plays in the county.

PLAN IMPORTANCE / IMPLICATIONS –

- The low “Positive” rating (62%) is a confusing response to a plan issue because it implies that we should ignore existing businesses.
- A negative result would result from acting on this perspective.
- The plan draft needs to reinforce retention as a co-equal effort to attraction.
- Participants do not find retention particularly exciting.

3. Market, Real Estate, Housing Strategies Section

The purpose of questions addressing market, real estate, and housing strategies was to determine the level of support of land supply and location options. The survey questions are separated into two sub-categories by plan creation emphasis: government criteria and land criteria.

GOVERNMENT CRITERIA

For the ten “Government Criteria” questions, the following implications for plan development are 1) clustered by response as follows: greater than 90%; between 75% and 89%; and less than 75%; and 2) the results are categorized by topic. The results are then considered in terms of general planning implications.

The highest ranked cluster (those receiving greater than 90% of the responses) deals with facilitating redevelopment through specific governmental actions. Redevelopment was seen as essential to economic development, and such projects should be processed in a more streamlined fashion. These processes are typically jurisdiction-specific, but an equally high-rated concern was the need for intergovernmental coordination, i.e., providing coordinated processes across jurisdictional boundaries. This does not necessarily require central “control.” Rather, common approaches to processing redevelopment projects. The last factor in this first cluster addresses the provision of concurrency exclusion zones to facilitate redevelopment. Taken together, the plan implications focus on:

- Policies that facilitate redevelopment from a common context;
- Intergovernmental coordination policies that create level playing fields between jurisdictions; and
- Use of available mechanisms, e.g., concurrency exclusion zones, to facilitate redevelopment.

The middle cluster (75%-89% of responses) deals with policy and organizational relationships that provide a central focus for actions that are countywide in nature. From the more general to specific, there is interest in approaching the State of Florida to address policy issues of infill, redevelopment, and economic development for “built-out” counties. Respondents were clear that an organizational and procedural framework was needed for plan implementation. The topic of incentives focused on the county initiating and managing a centralized approach. The plan implications for this cluster focus on:

- Policies that address county-state relationships and recommend revisions to the Florida *Growth Management Act* for redeveloping jurisdictions;
- Organizational and procedural mechanisms for implementation that are applicable countywide; and
- Instituting a tax incentive program for the county by referendum.

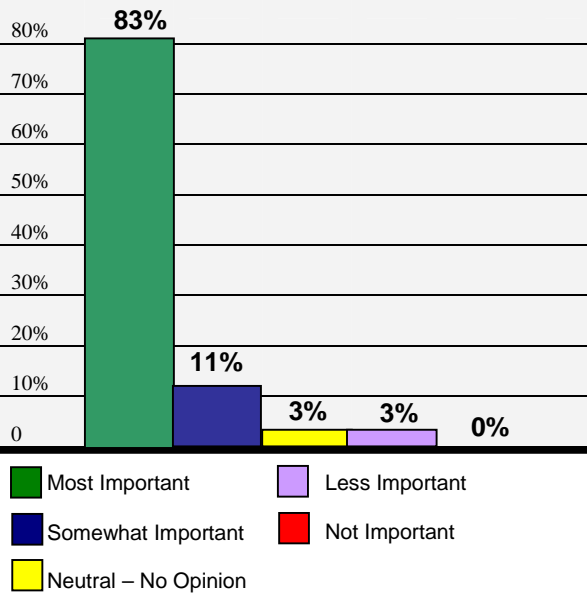
The final cluster (those receiving less than 75% of the responses) addresses a series of implementation issues that are dissimilar. The reduction or elimination of impact fees, and the provision of capital improvements to foster redevelopment are county and city responsibilities. Requiring businesses to upgrade aging infrastructure was a private consideration. This cluster had a higher than usual “Less/Not Important” set of responses. The plan implications for this series focused on:

- Expanding the dialogue on a full range of intergovernmental coordination implementation mechanisms, including capital improvements programming; and
- Specific review of impact fees as an on-going technique.

The following bar charts depict the results by statement and include intent and relative importance or implications for plan development.

Market, Real Estate, and Housing Strategies

#1 - Development approvals for target industry projects in identified redevelopment areas should be processed in a streamlined manner by the appropriate regulatory agency.



INTENT –

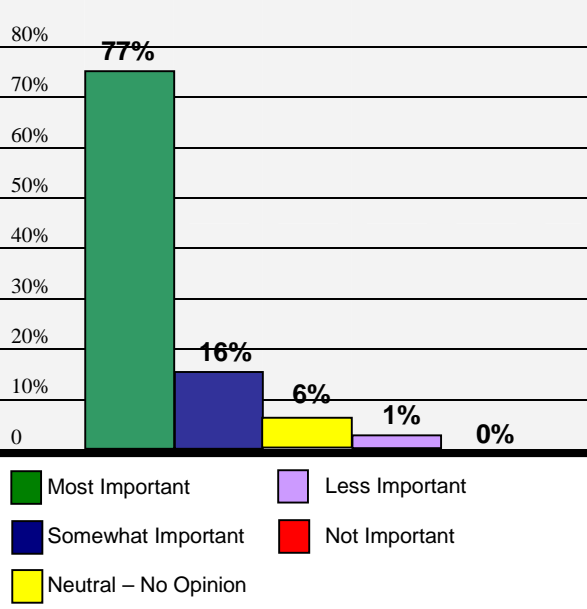
- Determine acceptability of “fast-tracking” approvals for redevelopment projects for target employers.

PLAN IMPORTANCE / IMPLICATIONS –

- Place a high priority on target employers.
- Develop a regulatory process to streamline approvals.
- Provide guidance to various levels of government.
- This statement had the highest “Positive” response (94%) in this issue area.

Market, Real Estate, and Housing Strategies

#2 – For the purpose of facilitating redevelopment on a coordinated county-wide basis, a structured process for inter-governmental coordination is essential.



INTENT –

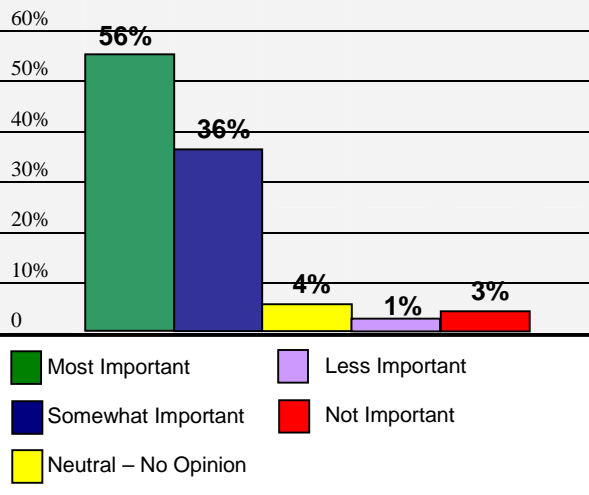
- Determine interest in facilitating redevelopment across various jurisdictions.

PLAN IMPORTANCE / IMPLICATIONS –

- Amend the *Countywide Plan for Pinellas County* to address coordination issues.
- Provide guidance to various levels of government.
- Define processes and relationships.
- This response had a very high “Positive” rating (93%).

Market, Real Estate, and Housing Strategies

#3 – Because Pinellas County has limited ability to expand capacity of its roadway system, we should review the requirements for concurrency exclusion zone(s) to accommodate redevelopment and encourage transit use.



INTENT –

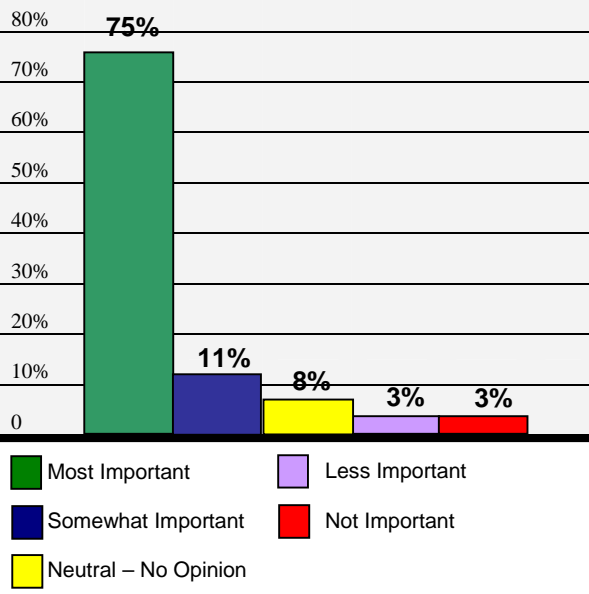
- Determine the county’s ability to live with congestion to facilitate redevelopment and increased transit use.

PLAN IMPORTANCE / IMPLICATIONS –

- Incorporate policies dealing with acceptable levels of congestion.
- Develop criteria to amend regulations to include identified concurrency exclusion zones.
- Support transit as a viable, necessary transportation mode to deal with congestion, and support redevelopment.
- This response level (92% “Positive”) validates the community’s understanding of the need to develop redevelopment and mobility alternatives.

Market, Real Estate, and Housing Strategies

#4 – The Countywide Plan should enable the organizational and procedural mechanisms needed to implement the *Economic Development and Redevelopment Plan for the Pinellas Community*.



INTENT –

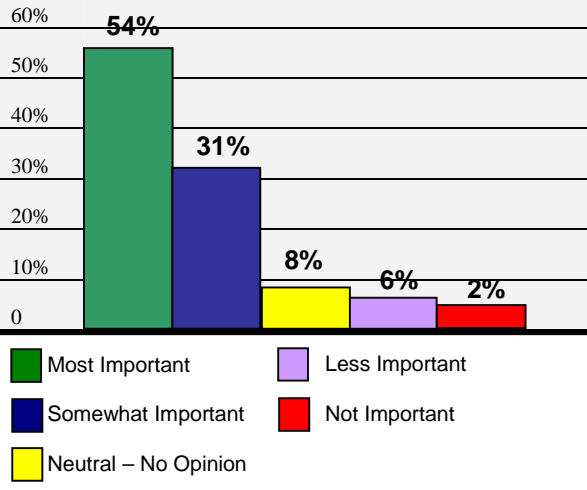
- Determine level of interest in identifying and adopting organizational and procedural methods in a countywide format.

PLAN IMPORTANCE / IMPLICATIONS –

- Amend the *Countywide Plan for Pinellas County* to enable organizational and procedural mechanisms to be developed.
- Develop the organizational and procedural mechanisms in the *Economic Development and Redevelopment Plan*, including roles and responsibilities.
- This statement had a moderately high “Positive” ranking (86%).

Market, Real Estate, and Housing Strategies

#5 – The Economic Development and Redevelopment Plan for the Pinellas Community should be directed at new policy relationships with the State of Florida through the countywide planning process to address infill, redevelopment, and economic development issues in a built-out county.



INTENT –

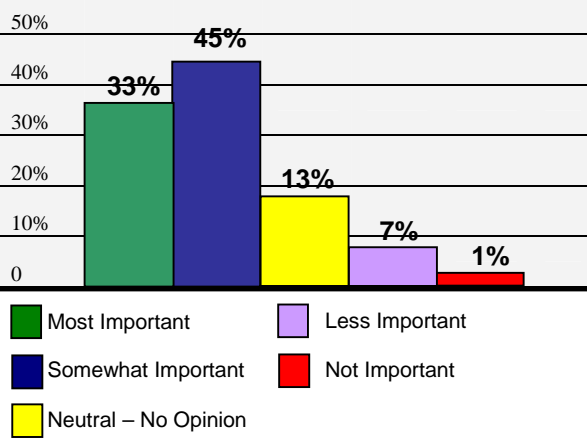
- Determine interest in approaching the State of Florida to develop growth management guidelines for redeveloping jurisdictions.

PLAN IMPORTANCE / IMPLICATIONS –

- Develop a strategy for approaching the State with recommendations for planning in built-out communities.
- Prepare an outline of the criteria, roles, and responsibilities.
- Establish a timetable with the local legislative delegation for development of a strategy.
- With an 85% “Positive” response rate, this statement is important.

Market, Real Estate, and Housing Strategies

#6 – Pinellas County government should take the lead in creating a tax incentive program by initiating the appropriate ordinance or referendum action.



INTENT –

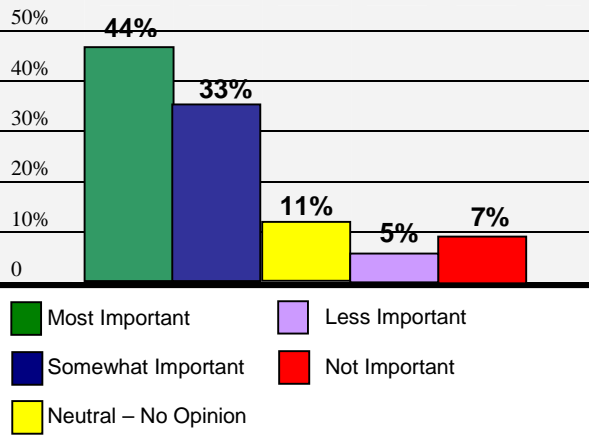
- Determine which level of government should develop the legal mechanisms for activating incentives.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify appropriate implementation mechanisms for the plan.
- Designate the Pinellas County government as the responsible entity.
- The Pinellas County government was selected by 78% of the respondents as the entity to initiate an enabling ordinance.

Market, Real Estate, and Housing Strategies

#7 – The management of the targeted employers incentive program should be centralized and assigned to an economic development and/or redevelopment agency on a countywide basis.



INTENT –

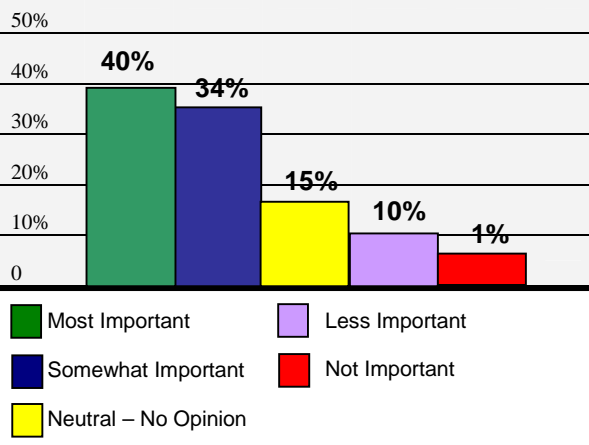
- Determine whether management of the target employers incentive program should be centralized.

PLAN IMPORTANCE / IMPLICATIONS –

- Incorporate incentives in the plan.
- Describe alternative implementation arrangements.
- Define a centralized function.
- 77% of the respondents agreed to centralized management of incentives.

Market, Real Estate, and Housing Strategies

#8 – To implement the Plan, local governments should make a commitment to fund capital improvement needs.



INTENT –

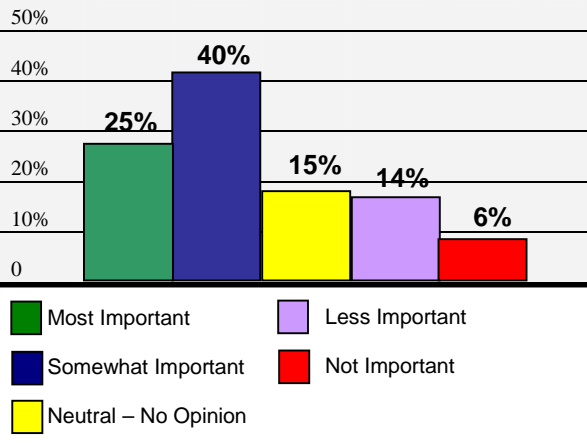
- Determine level of local commitment to fund capital improvements for redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Reinforce the role of capital improvements programming in redevelopment.
- Establish appropriate project type to support redevelopment.
- 74% responded that local governments should fund improvements for redevelopment.

Market, Real Estate, and Housing Strategies

#9 – Surrounding greenfield communities are raising impact fees. In built-out communities, impact fees and other infrastructure contributions should be reduced or eliminated as a redevelopment incentive.



INTENT –

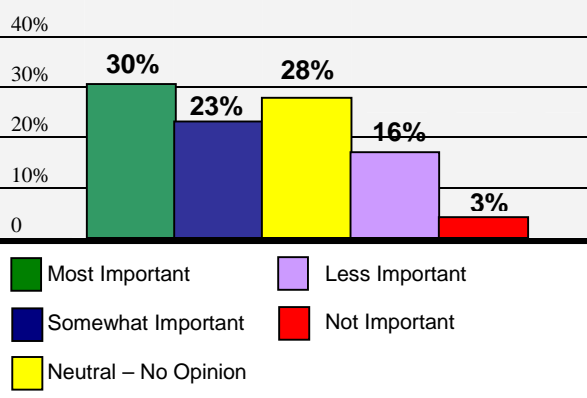
- Determine interest in eliminating/reducing regulatory requirements as an incentive to encourage redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Establish a section on regulatory relief in the plan.
- Develop a task force to evaluate alternatives.
- Develop recommended relief as an incentive.
- Two-thirds of the respondents agreed to reduce or eliminate current requirements.

Market, Real Estate, and Housing Strategies

#10 – Businesses locating or expanding in Pinellas County should be required to contribute to the upgrading of aging infrastructure.



INTENT –

- Determine whether businesses should upgrade aging infrastructure.

PLAN IMPORTANCE / IMPLICATIONS –

- This statement drew the lowest “Positive” response (53%), with a large “Neutral - No Opinion” response (28%) that may mean additional education or plan analysis is needed.

LAND CRITERIA

For the thirteen identified “Land Criteria” questions, the implications for plan development are clustered by response as follows: greater than 80%; between 65% and 79%; and less than 64%. Second, the results are categorized by topic. They are then considered in terms of general planning implications.

The highest ranked cluster (>80%) deals with facilitating redevelopment through development incentives, providing infrastructure improvements, and promoting high-density urban housing to support employment. While unrelated to the general discussion of target employer redevelopment, there was a clear message that the state of the tourism industry, especially along the beaches, must be addressed. The plan implications for the first topic cluster should focus on:

- Policies that link with the Government Criteria (discussed above) to provide a diverse package of incentives for redevelopment;
- Housing policies that address densities, mixes of uses, and location criteria and standards within and adjacent to employment centers; and
- Expanding the target employer focus to address the reduction of the traditional beach tourism base.

The middle cluster (65%-79%) deals with a series of related factors beginning with the desire to increase the county’s total employment percentage, while emphasizing the desire to have primary employment center locations, and then assembling land in support of these criteria. The plan implications for this cluster focus on:

- Policies that expand target employment recruitment and job training opportunities;
- Location, size, and mix criteria for employment centers;
- A coordinated approach to assembling and providing land to attract the target employers to preferred locations;
- Incentives that reduce the land cost portion of the redevelopment equation; and
- Correlating with the lower tier criteria on property/parcel acquisition.

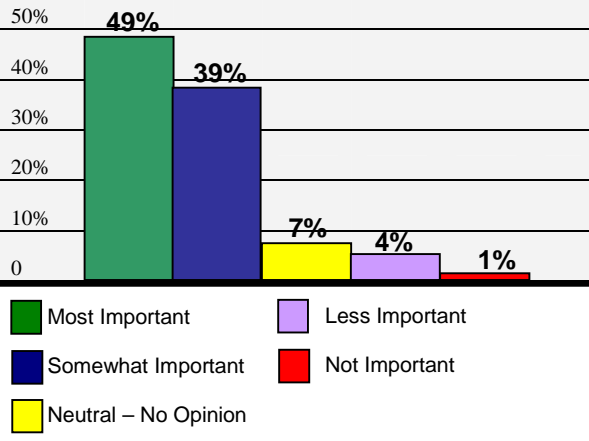
The final cluster (<65%) addresses a diversity of criteria such as location preferences for employment centers, assembling urban (workforce) housing sites, and investing in distressed areas for long-term gains. Respondents appear to be housing location “neutral” with all sections of the county considered appropriate locations. Issues of using eminent domain to assemble housing sites, and using private companies to negotiate agreements, had higher levels of “Less/Not Important” responses. This may imply that the market should address these issues, and that the plan should provide for a wide range of housing options. While the response to the criteria relating to investments in distressed areas was in the latter cluster, the interest in community redevelopment activities can be seen as generally supportive. The plan implications for the final series focus on:

- Developing flexible location criteria for target employers;
- Coordinating housing initiatives with community development agencies to facilitate urban housing; and
- Including long-term investments in distressed areas as part of a coordinated, countywide community redevelopment program.

The following bar charts depict the results by statement and include an intent and relative importance or implications for plan development.

Land Criteria

#1 – To encourage shorter commuting times, it is appropriate to permit some mid to high-density residential development within employment centers and within ½-mile of those centers, such as a 1½ to 2½ multiplier of underlying density.



INTENT –

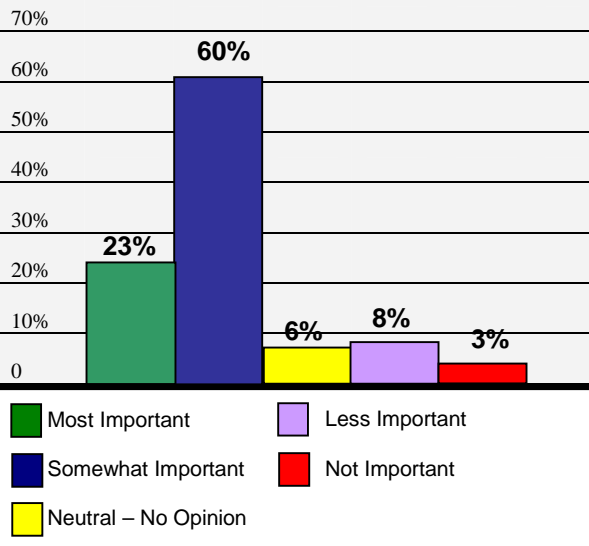
- Determine interest in introducing high-density residential uses as part of or near employment centers.
- Determine interest in balancing jobs/housing relationship and increasing densities.

PLAN IMPORTANCE / IMPLICATIONS –

- Address internal capture, reverse commute, and intercepting through traffic.
- Incorporate housing within employment/non-residential districts with density bonuses.
- Address affordable housing and use of public lands.
- Use dwelling units as additions to the floor area ratio (FAR).
- 88% “Positive” response indicates acceptance.

Land Criteria

#2 – Because the cost of redevelopment is greater than that for greenfields development, government should partner with developers and provide incentives to reduce those costs.

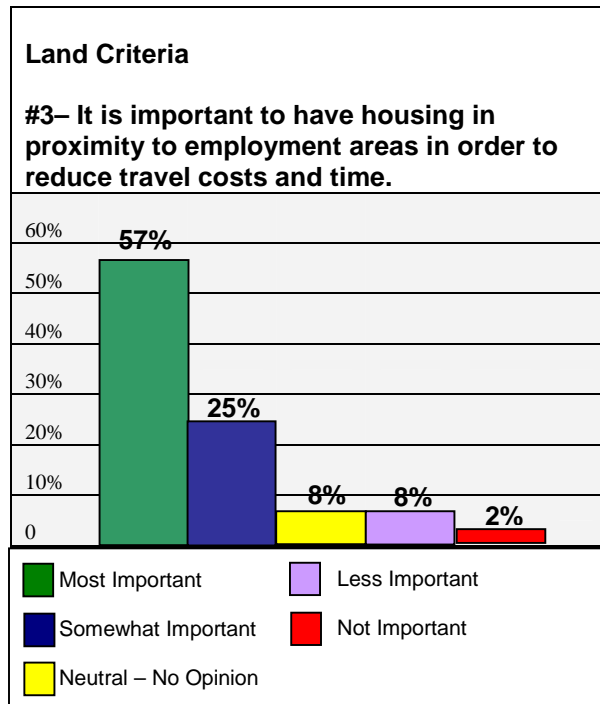


INTENT –

- Test the use of incentives to reduce cost of development.

PLAN IMPORTANCE / IMPLICATIONS –

- Define portfolio of development incentives.
- Link to target employers criteria.
- Define the application of subsidy to each level of partnered redevelopment.

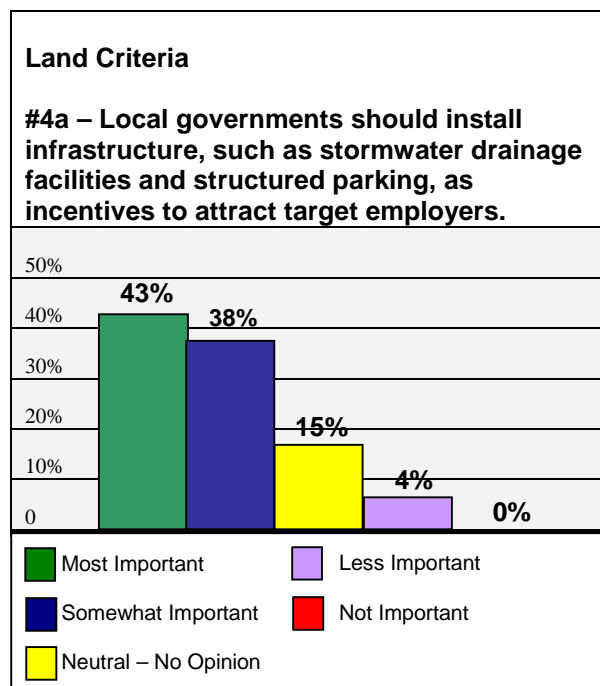


INTENT –

- Determine interest in introducing high-density residential uses as part of or near employment centers.
- Determine interest in balancing jobs/housing relationship and increasing densities.

PLAN IMPORTANCE / IMPLICATIONS

- Address internal capture, reverse commute, and intercepting through traffic.
- Incorporate housing within employment/non-residential districts.
- Use density bonuses to encourage housing.
- Link urban (workforce) housing and use of public transportation incentives.

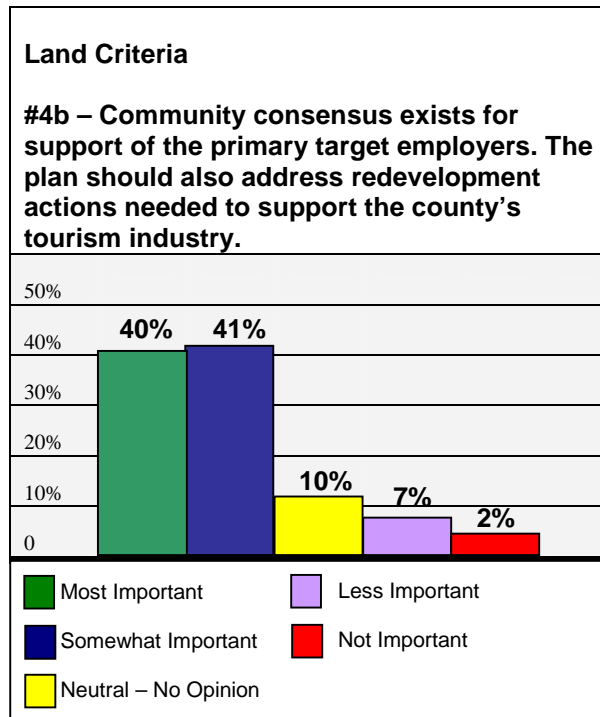


INTENT –

- Determine interest in the public provision of physical investments as incentives.

PLAN IMPORTANCE / IMPLICATIONS –

- Develop public/private partnership structures.
- Develop methodology for project types to receive infrastructure improvements.
- Establish link of drainage improvements to specific employment centers.

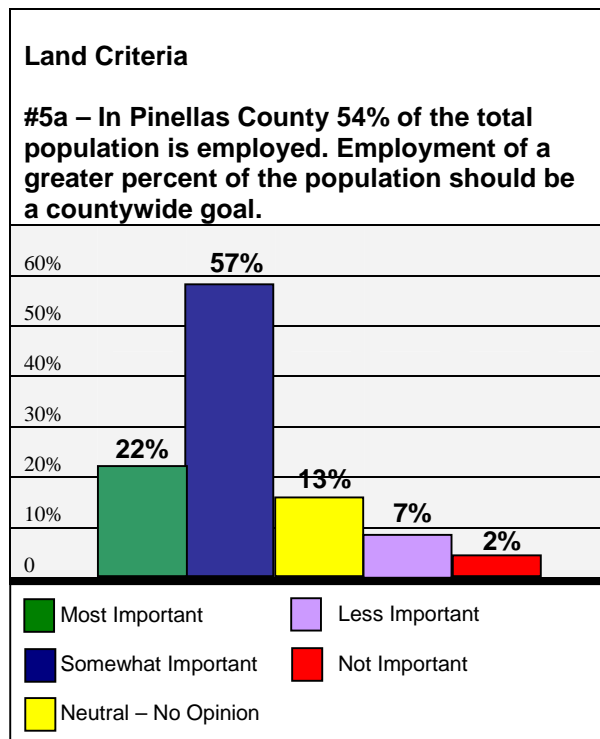


INTENT –

- Compare the importance of tourism versus target employment strategies.

PLAN IMPORTANCE / IMPLICATIONS –

- Establish a task force on tourism.
- Prepare an analysis of tourism land development economics.
- Develop a coordinated beach/tourism plan that builds on working models.
- Link capture of lost resort units to possible retention incentives.
- Consider creation of tourism tax increment financing for resort redevelopment projects.

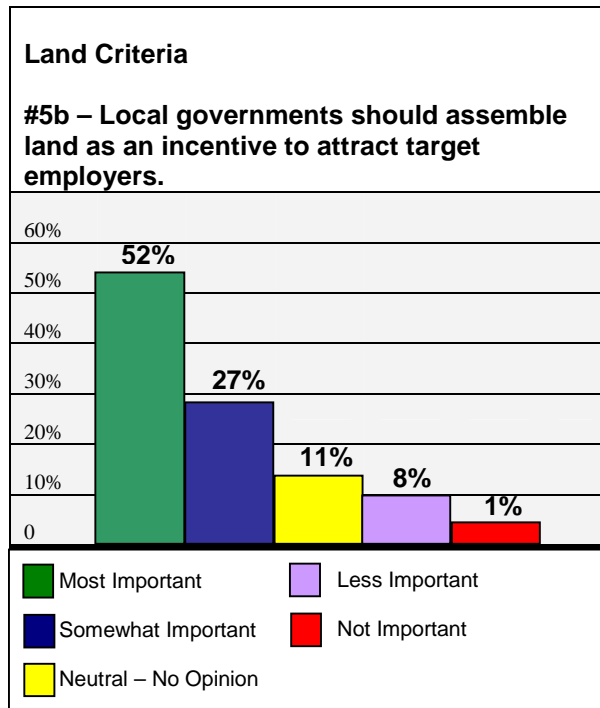


INTENT –

- Determine if the percentage of the population who are employed should increase.

PLAN IMPORTANCE / IMPLICATIONS –

- Determine acceptable employment percentage target range.
- Define conditions required or precedent to reaching the employment goal.

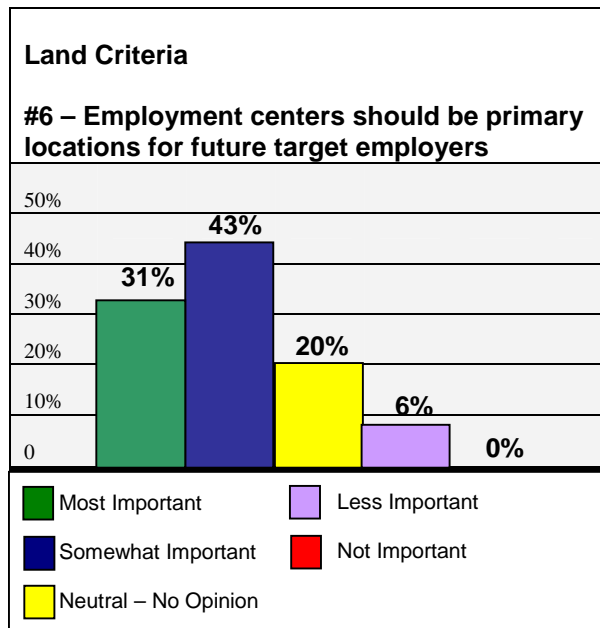


INTENT –

- Determine governmental commitment to a playing a role in assembling redevelopment sites.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify assembly techniques.
- Link to countywide Community Redevelopment Area program.
- Link to target employment criteria.
- Study applications for urban (workforce) housing.

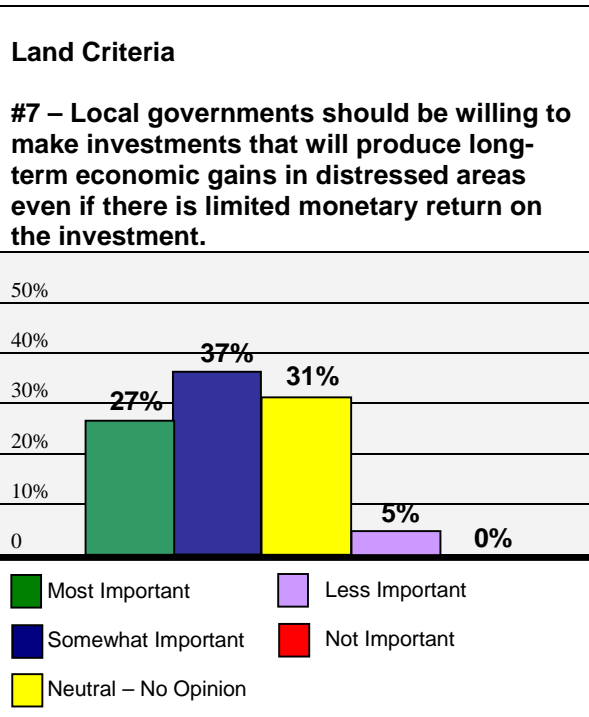


INTENT –

- Determine location flexibility or predictability.

PLAN IMPORTANCE / IMPLICATIONS –

- Include specific and flexible locations where target employers may locate.
- Include all centers as possible employment locations.
- Develop criteria for non-employment center site decisions.
- The relatively high “Neutral – No Opinion” response (20%) may mean additional education or plan analysis is needed.

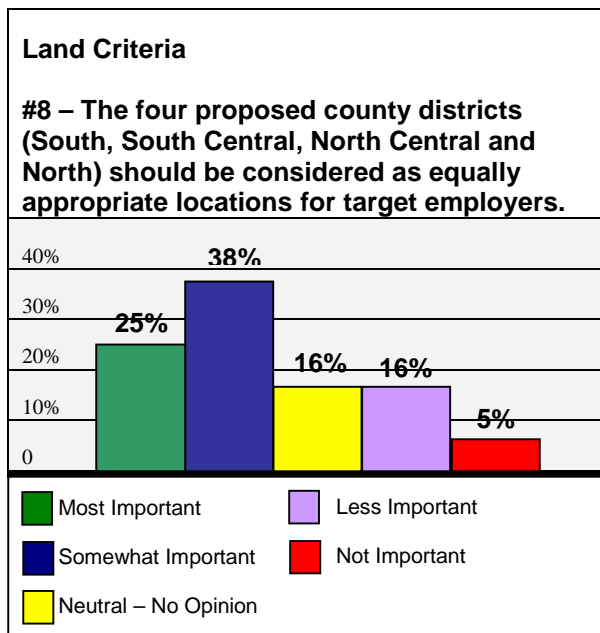


INTENT –

- Determine governmental willingness to support long-term investment return in upgrading distressed areas.

PLAN IMPORTANCE / IMPLICATIONS –

- Support the use of community redevelopment districts to overcome the negative effects of distressed areas.
- Develop alternative strategies including incentives.
- Investment needed in under-performing and areas like the Dome Industrial District.
- Mixed result show low support.
- The high “Neutral – No Opinion” response (31%) may mean additional education or plan analysis is needed.

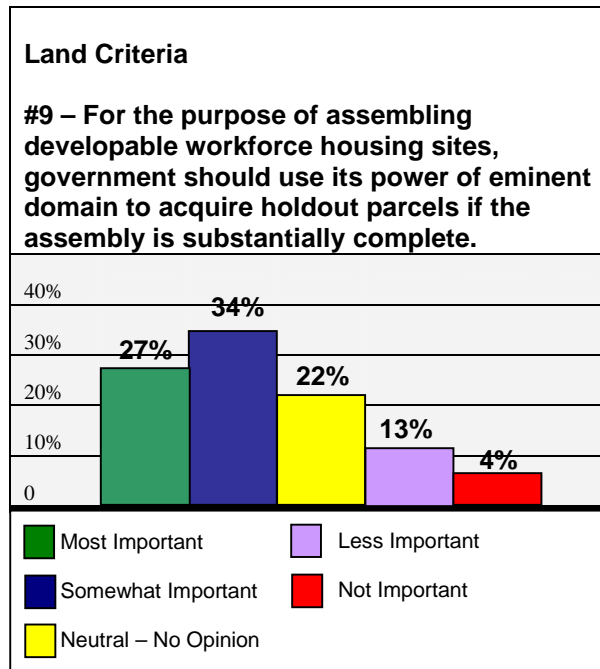


INTENT –

- Determine attitude towards geographic location of target employers.

PLAN IMPORTANCE / IMPLICATIONS –

- The mixed message on priority implies “let the market decide.”
- There is limited consensus on diversity and concentration of employment centers.

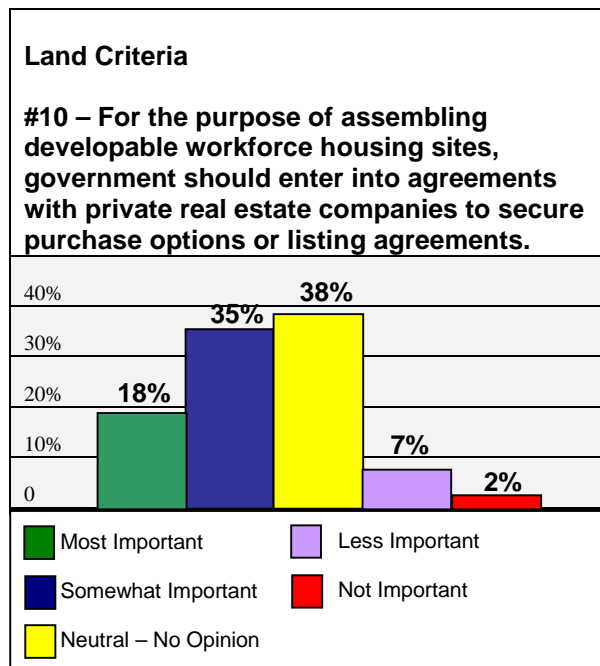


INTENT –

- Determine to use governmental powers in assembly efforts to structure redevelopment sites.

PLAN IMPORTANCE / IMPLICATIONS –

- “Positive (61%),” but mixed level of commitment may mean a level of acceptance for government programs, but there is no strong support.
- Action to assemble lands needs to be supported by local government.
- The high “Neutral – No Opinion” response (22%) may mean additional education or plan analysis is needed.



INTENT –

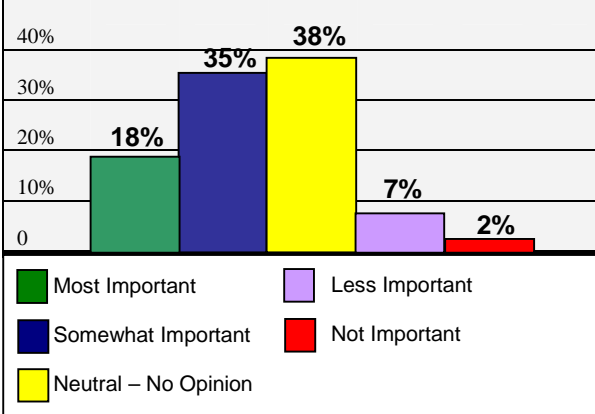
- Determine to use private sector assembly efforts to structure redevelopment sites.

PLAN IMPORTANCE / IMPLICATIONS –

- “Positive (53%),” but mixed level of commitment may mean, “let the market control.”
- Acting to assemble independently of an identified developer may be problematic.
- The high “Neutral – No Opinion” response (29%) may mean additional education or plan analysis is needed.

Land Criteria

#10 – For the purpose of assembling developable workforce housing sites, government should enter into agreements with private real estate companies to secure purchase options or listing agreements.



INTENT –

- Determine the acceptance of the Gateway area as the primary location for target employer attraction.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should support multiple target employer redevelopment areas.
- The Gateway area is a significant location for existing target employers.
- The 53% “Positive” response is one of the lowest responses showing poor commitment to the issue.
- The high “Neutral – No Opinion” response (38%) may mean additional education or plan analysis is needed.

4. Urban Design and Regulatory Codes Section

The purpose of questions regarding urban design and regulatory codes strategies was to determine opinions regarding respondent support of options in the future land pattern of development and needed regulatory measures. Responses to the survey questions or statements were predominantly clustered in the “Most Important” and “Somewhat Important” categories. The responses are separated into two sub-categories by area of plan creation emphasis: “Regulation Criteria” and “Urban Criteria.”

REGULATION CRITERIA

For the ten “Regulation Criteria” questions, the following implications for plan development are clustered by response as follows: greater than 89%; between 80% and 88%; and less than 80%. The results are also categorized by topic. The results are then considered in terms of general planning implications.

The highest ranked cluster (>89%) deals with facilitating redevelopment through revision of development regulations, creating prototypical models, and seeking area-wide approvals. There was a clear message that the existing development regulations do not foster desirable or beneficial redevelopment activities and must be modernized to deal with the current and future redevelopment/infill environment. The plan implications for the first topic cluster focus on:

- Revising land development regulations to encourage mixed-use projects;
- Developing prototypical redevelopment districts for local government use; and
- Identifying area-wide approvals for major redevelopment projects.

The middle cluster (80%-89%) deals with a series of related factors beginning with the desire for countywide recognition of redevelopment activities, revision of land development regulations to facilitate redevelopment, and government initiated approvals. There is clear support for revising regulations. The plan implications for this cluster focus on:

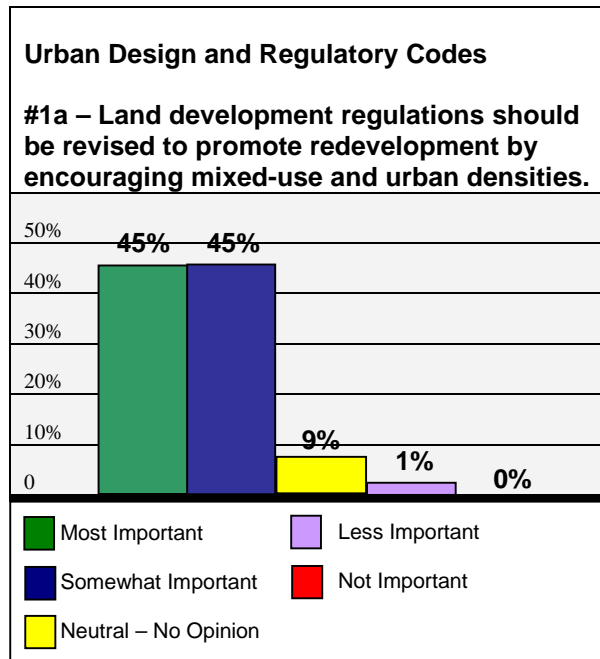
- Including redevelopment mechanisms in the *Countywide Plan for Pinellas County*;
- Coordinating redevelopment incentives on a countywide program;
- Revising land development regulations to facilitate redevelopment activities; and
- Enforcing development regulations consistently.

The final cluster (<80%) includes only one response. It is listed separately due to the concentration of the middle cluster responses. It also deals with improving regulatory mechanisms to promote redevelopment opportunities and can be seen as generally



supportive. The plan implications for the final series focus on developing regulations that help attract target employers.

The following bar charts depict the results by statement and include an intent statement and relative importance or implications for plan development.

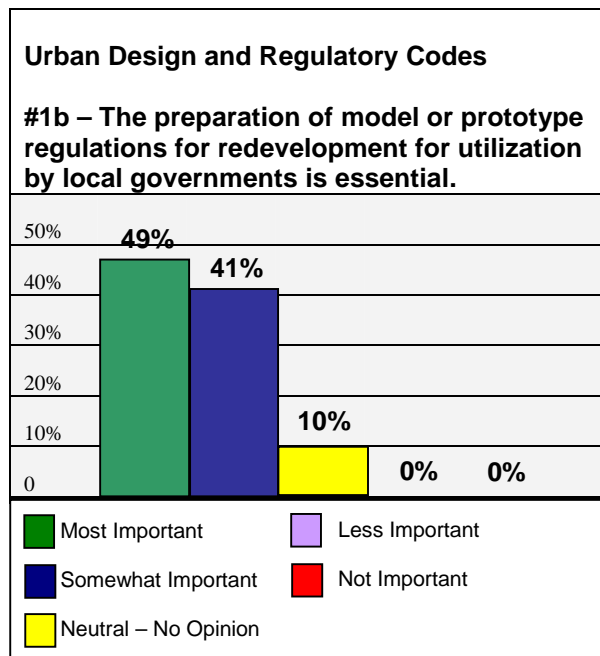


INTENT –

- Determine interest in revising land development regulations to facilitate redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify code provisions that facilitate redevelopment.
- The moderately high level of “Positive” response (90%) indicates acceptance that redevelopment needs different regulations and incentives than greenfield development.

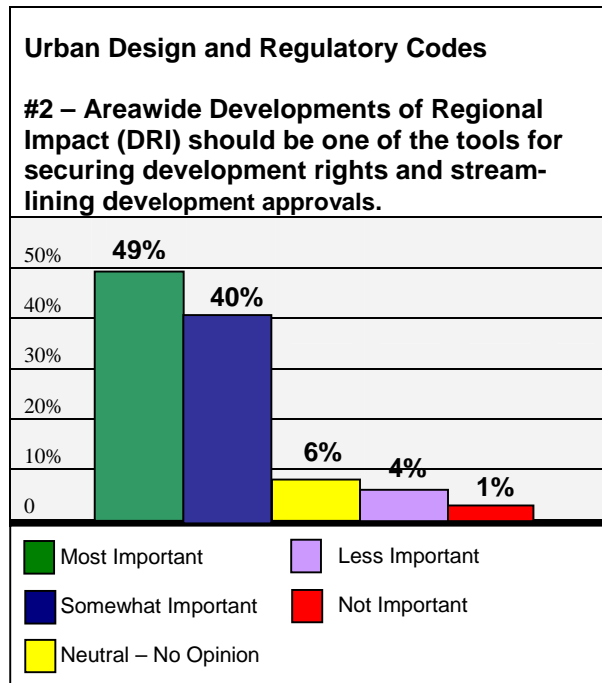


INTENT –

- Determine the desire for standardized development code provisions to facilitate redevelopment within the county.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify redevelopment prototypes that can be used by various levels of government to direct redevelopment.
- Identify alternative methods of applying prototypes.
- The moderately high level of “Positive” response (90%) indicates the need for common regulations.

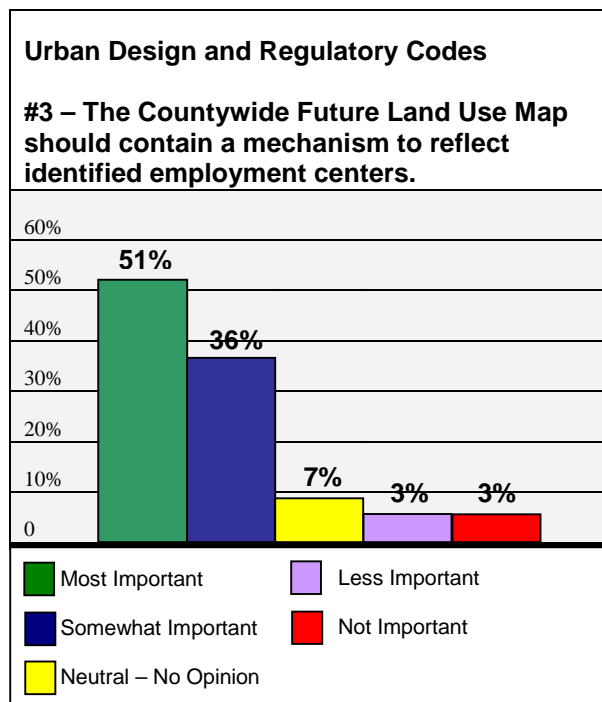


INTENT –

- Determine level of acceptance for master planning redevelopment areas for target employment.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should consider identifying specific areas where redevelopment is desired.
- Define potential “applicants” for areawide DRIs.
- Link to incentive programs.
- The moderately high level of “Positive” response (89%) indicates acceptance of areawide approvals.



INTENT –

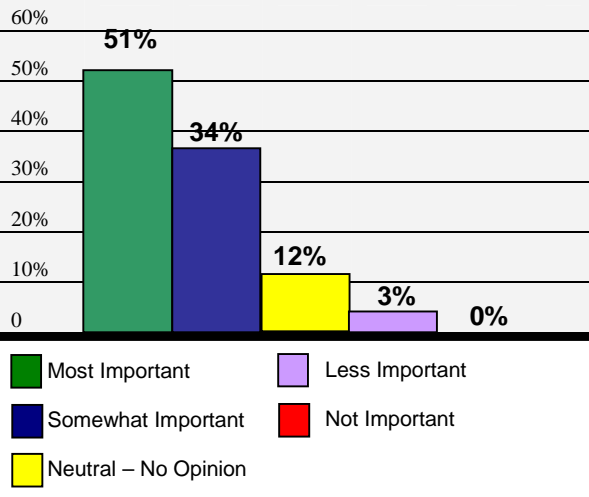
- Determine the interest in a countywide implementation approach for redevelopment entitlements.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should identify strategies that support redevelopment and provide guidance to various government levels.
- Identify large areas that are susceptible to change without identifying specific sites within them.
- The moderate level of interest (87%) identifies the desire for countywide identification of redevelopment areas.

Urban Design and Regulatory Codes

#4a – There should be a countywide, government-sponsored community redevelopment program created to serve as one of the tools for attracting target employers.



INTENT –

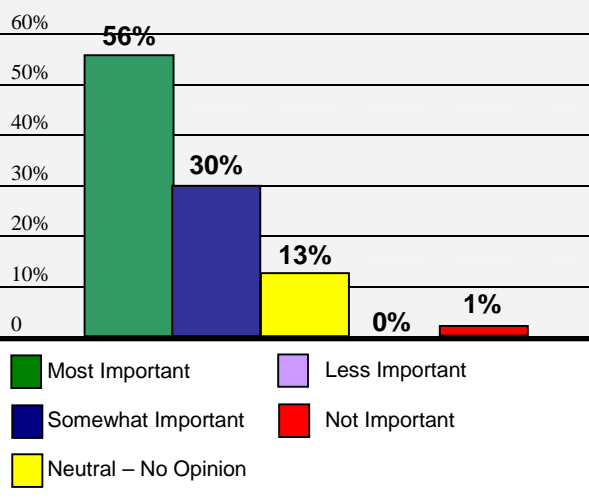
- Determine the interest in a coordinated countywide redevelopment program.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify roles and responsibilities for implementation of a countywide redevelopment program.
- Identify potential areas for redevelopment activities.
- The moderate level of “Positive” response (86%) indicates acceptance that a coordinated countywide program should implement redevelopment activities.

Urban Design and Regulatory Codes

#4b – Local land development regulations should be revised to better integrate and streamline separate parts of the development review process such as special exceptions, variances (i.e., non-conformities flexibility), site plan review, and rezoning.

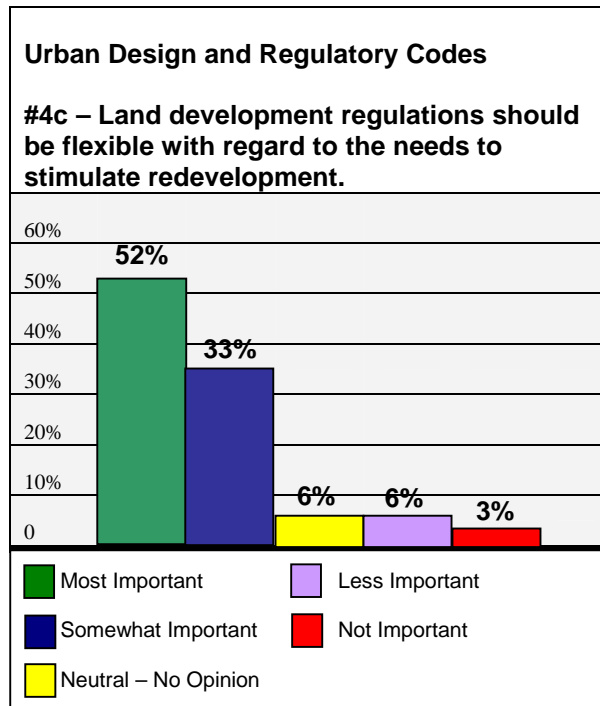


INTENT –

- Determine the level of interest to create streamlined regulations to facilitate redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify land development regulations or processes that hinder or support redevelopment activities.
- Identify roles and responsibilities.
- Develop policies for levels of approval.
- The moderate level of “Positive” response (86%) indicates the need for revised development regulations.

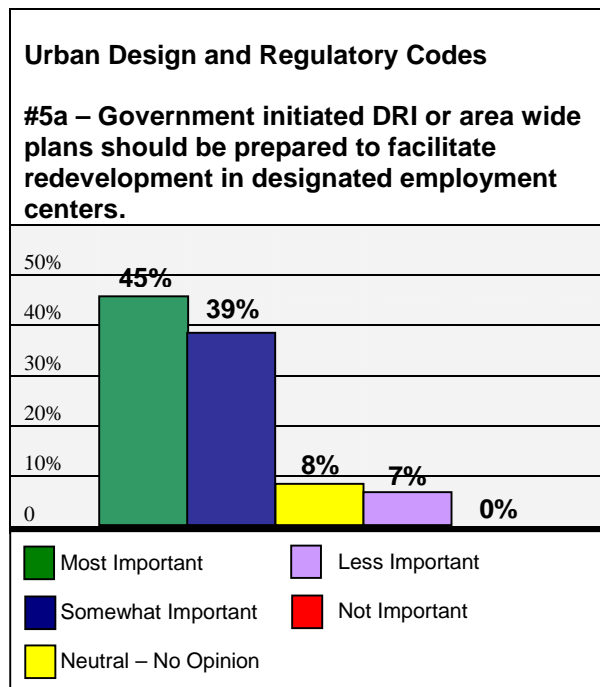


INTENT –

- Determine level of interest in allowing flexible regulations to facilitate redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify alternative development regulations that support redevelopment.
- Permit flexible development regulations (e.g., form-based codes, etc.).
- The moderate level of “Positive” response (85%) indicates the need for alternative regulations to facilitate redevelopment.

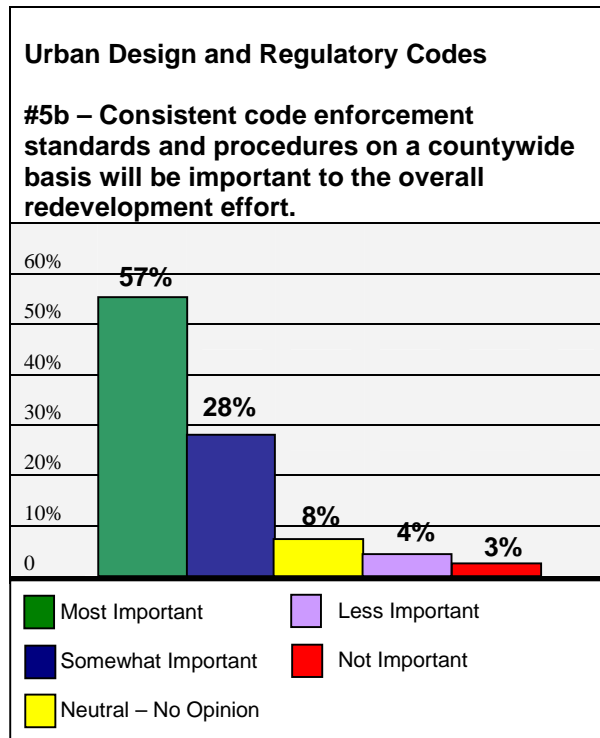


INTENT –

- Determine interest for government plans to identify specific locations where redevelopment is desired.

PLAN IMPORTANCE / IMPLICATIONS –

- Identifying specific locations, not projects, tends to drive land costs up in response to limited resources.
- The plan should look to reinforce redevelopment project types, not specific locations.
- Identify flexible plan categories to foster employment and redevelopment.
- The level of response (84% “Positive”) identifies acceptance of the proposal to define specific locations.

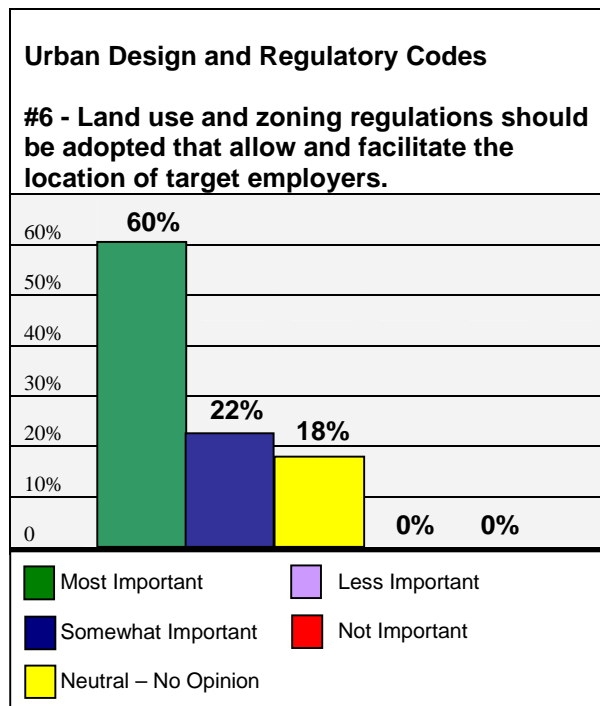


INTENT –

- Determine interest in countywide standards and procedures for code enforcement to facilitate redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Various levels of government interpret land development regulations differently and uniform implementation can assist redevelopment activities.
- Set minimum standards for enforcement.
- Establish a task force to address the issues and recommend solutions.
- The moderate level of “Positive” response (85%) identifies the need for uniform standards.



INTENT –

- Determine interest in developing regulations to facilitate redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should facilitate and identify specific locations where redevelopment is desired.
- Consider “Susceptible to Change” areas or specific area plan districts.
- The moderate level of “Positive” response (82%) identifies the need for certainty in target employer attraction sites.

URBAN CRITERIA

For the nine identified “Urban Criteria” questions, the following implications for the plan are first clustered by response, as follows: greater than 90%; between 80% and 89%; and less than 80%. The results are also categorized by topic and are then considered in terms of general planning implications.

The highest ranked cluster (>90%) deals with facilitating redevelopment through the evolution of the existing land development pattern to create targeted areas with more focused urban development. The responses recognize that transit-oriented development should be supported by increased density/intensity in proximity to station locations, that government should assist by providing incentives for redevelopment, and that a range of development types is needed for the future of Pinellas County. The plan implications for the first topic cluster focus on:

- Identifying supportive land use densities and uses in proximity to transit systems;
- Providing government incentives for structured parking; and
- Amending codes and plans to promote a range of development types for the future of Pinellas County.

The middle cluster (80%-89%) deals with a series of related factors beginning with identifying non-essential public lands in order to target redevelopment, permitting varying standards for the efficient use of surface parking, and facilitating a range of development types throughout Pinellas County. The plan implications for this cluster focus on:

- Identifying non-essential public lands as redevelopment sites for target employment;
- Revising land development regulations to promote optimal use of area-wide or shared surface parking in mixed-use areas; and
- Permitting a range of development types through appropriate development regulations.

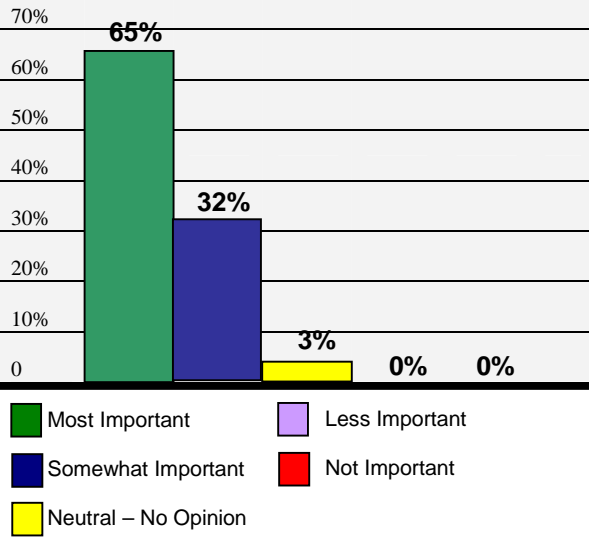
The final cluster (<80%) also deals with improving the range of development types within the county. The plan implications for the final series focus on:

- Facilitating the creation of compact, walkable communities;
- Permitting a range of development types through appropriate development regulations; and
- Permitting mixed-use development types.

The following bar charts depict the results by statement and include an intent statement and relative importance or implications for plan development.

Urban Criteria

#1 – Transit oriented development requires higher density/mixed-use near transit stations. Redevelopment plans should provide increased densities within a ½-mile of the stations.



INTENT –

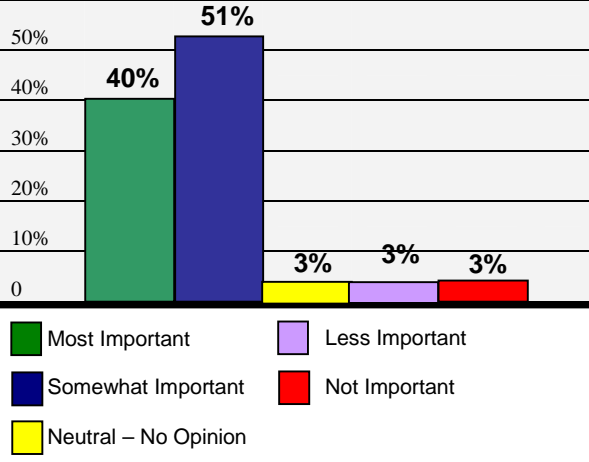
- Determine interest in affecting land use adjacent to transit systems.

PLAN IMPORTANCE / IMPLICATIONS –

- Most respondents support increased densities in transit areas.
- Create prototypical development forms and code provisions for transit-oriented development standards.
- The high level of “Positive” response (97%) recognizes the need to change development forms adjacent to transit.

Urban Criteria

#2a – Government provided incentives should include those for structured parking (e.g., parking garages)

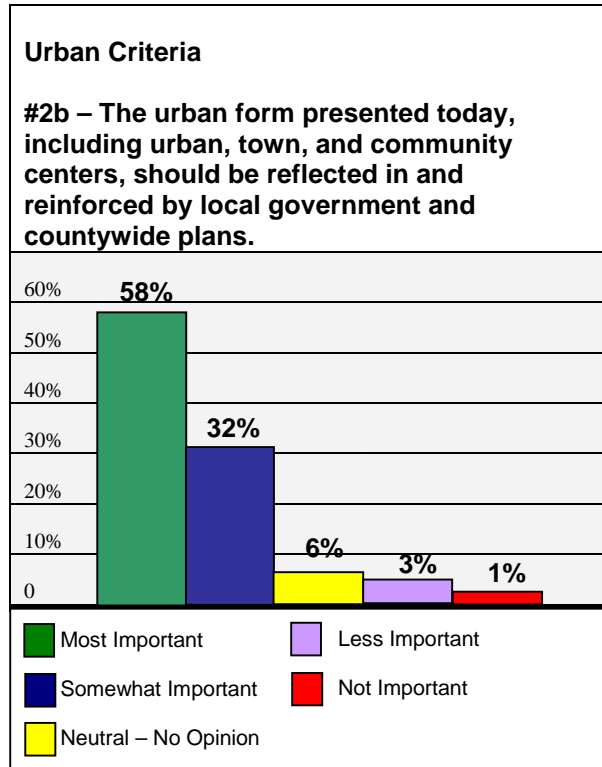


INTENT –

- Determine the level of support for physical improvements as incentives that can promote desirable redevelopment.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify the need for non-monetary incentives to increase development yield and reduce overall project costs.
- Identify appropriate applications, project types, and potential locations for structured parking.
- The high level of support (91%) indicates that respondents understand that structured parking incentives can assist redevelopment.

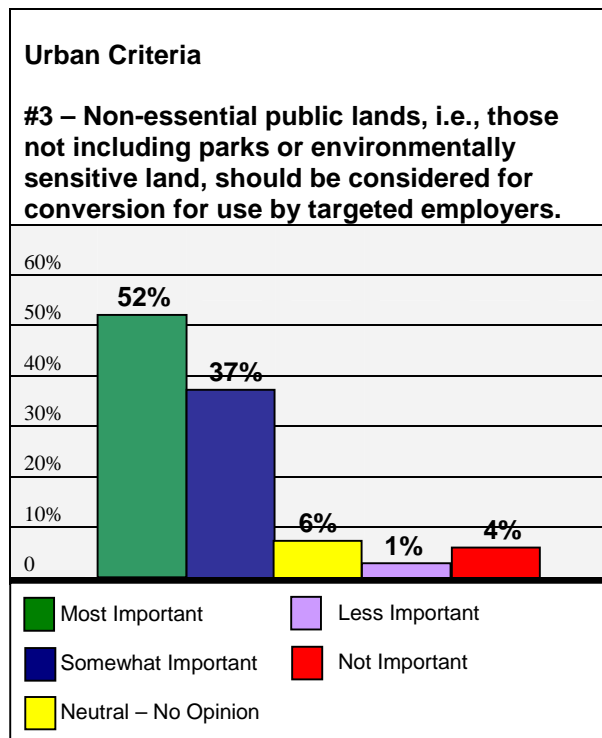


INTENT –

- Determine support of preliminary maps depicting a range of development types in a maturing Pinellas County future.

PLAN IMPORTANCE / IMPLICATIONS –

- A variety of development forms and types will be needed in Pinellas County’s future to assist redevelopment.
- It is important to support place-making redevelopment regulations that permit creation of centers.
- Identify standards and criteria.
- The moderately high level of “Positive” response (90%) identifies support for the preliminary concepts.

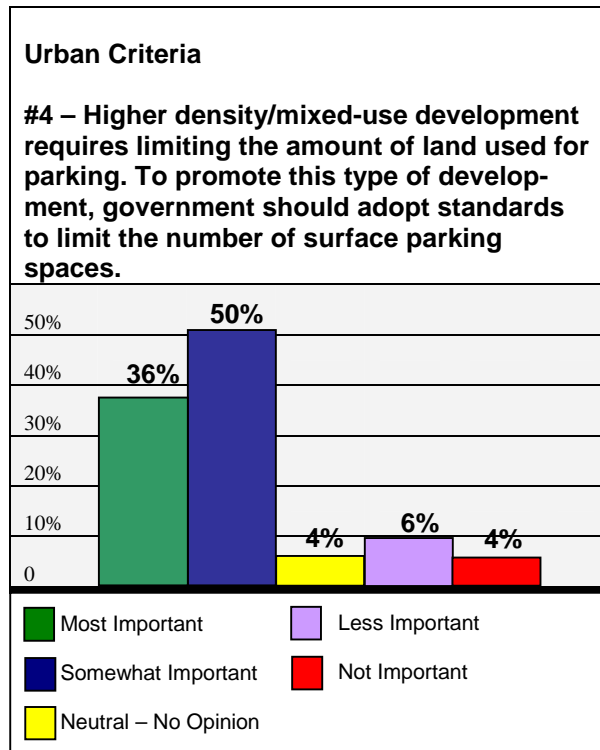


INTENT –

- Determine support for identifying and reusing public lands to create redevelopments that attract target employers.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should identify non-essential public lands as a resource for attracting major target employers.
- Develop prototype projects as models for public land utilization.
- The moderately high level of support (89%) identifies the respondents’ desire to market and attract target employers by utilizing non-essential county lands.

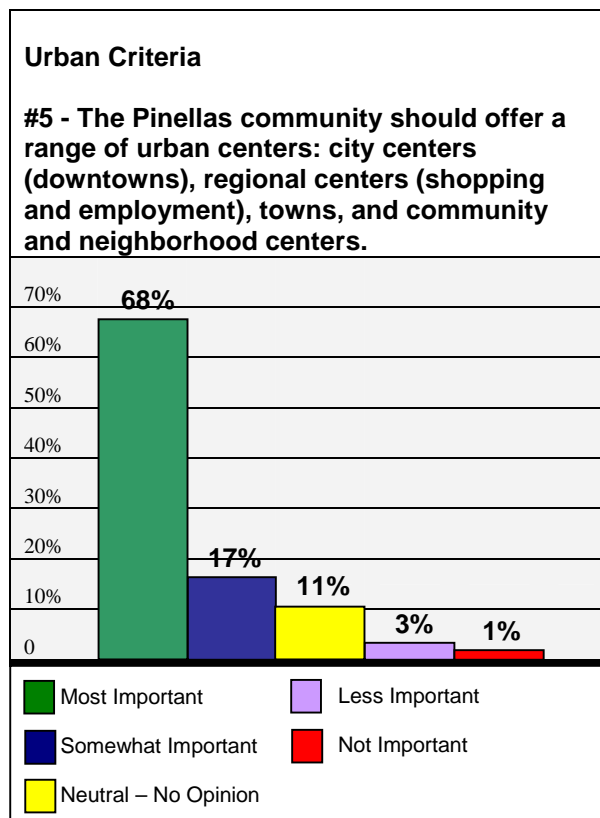


INTENT –

- Determine support for alternative development regulations that reduce the need for surface parking and support the use of structured parking.

PLAN IMPORTANCE / IMPLICATIONS –

- Identify prototypical codes and mechanisms to promote redevelopment through shared-parking and internal trip capture.
- The moderate level of support (86%) indicates that respondents understand that improved regulations are needed to support redevelopment.

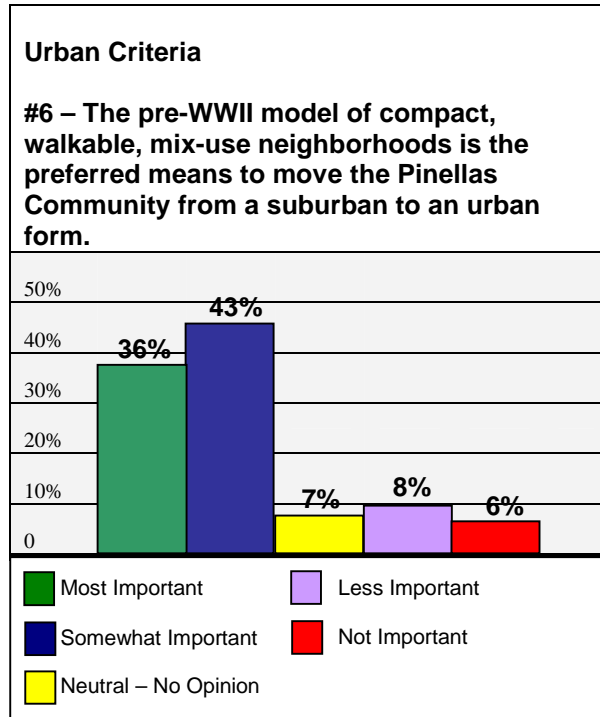


INTENT –

- Determine support of preliminary maps depicting a range of development types in a maturing Pinellas County future.

PLAN IMPORTANCE / IMPLICATIONS –

- Develop and adopt a future urban form policy.
- Incorporate the range of centers into the *Countywide Plan for Pinellas County*.
- Support place-making in redevelopment regulations to facilitate the creation of centers.
- The moderate level of “Positive” response (85%) indicates support for the preliminary concepts.

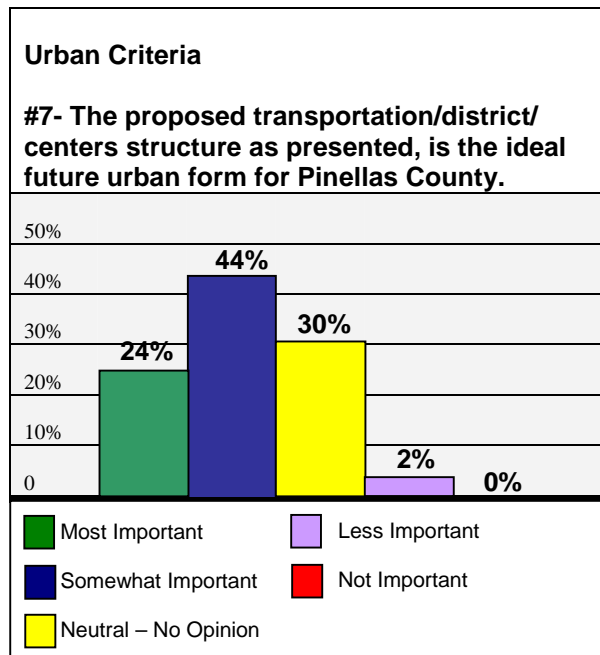


INTENT –

- Determine support for promoting a more urban form for the maturing Pinellas County future.

PLAN IMPORTANCE / IMPLICATIONS –

- Define the model in the *Countywide Plan for Pinellas County*.
- Identify general areas for application.
- Support place-making as part of redevelopment.
- The level of “Positive” response (79%) indicates support for creation of walkable community neighborhoods.

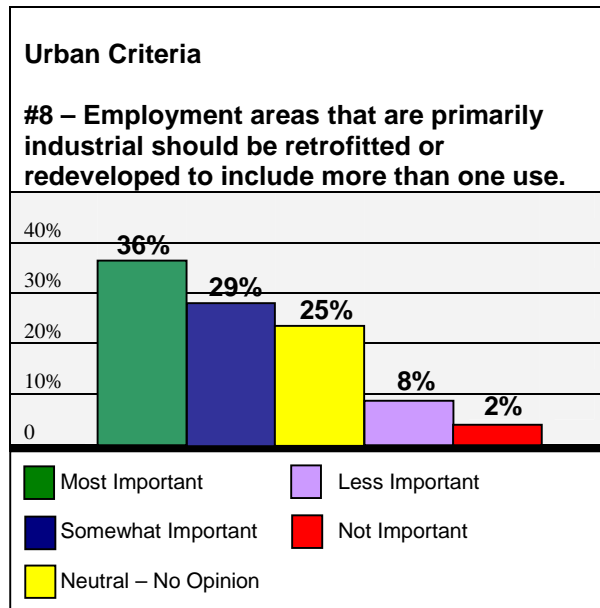


INTENT –

- Determine the support for preliminary concepts designed to create prototypical development forms.

PLAN IMPORTANCE / IMPLICATIONS –

- Create a variety of redevelopment models for use by different levels of government.
- High level of “Neutral – No Opinion” responses (30%) may mean additional education or plan analysis is needed.



INTENT –

- Determine the support for retrofitting single-use areas to mixed-use ones.

PLAN IMPORTANCE / IMPLICATIONS –

- The plan should consider some level of mixture of uses in industrial employment areas where supported by other plan factors.
- The range of responses indicates general support for inclusion of other land uses within industrially-designated areas.
- High level of “Neutral – No Opinion” responses (25%) may mean additional education or plan analysis is needed.

5. Summary Conclusions

The review and analysis of the Policies and Strategies Summit Survey responses provides important information for consideration in the further development of the *Economic Development and Redevelopment Plan for the Pinellas Community*. Several observations can be made regarding the response group and their results.

The project team acknowledges that the Summit Survey has a limited response population group made up of mostly governmental and business leaders who have an interest in development and/or redevelopment activities. Therefore, more scientific surveying may be warranted to broaden the response group and to determine if the results correlate to a more broad based audience. The additional survey should be developed from recent voter registration listings, and include a set of generalized questions that relate to the Summit Survey.

The Summit participants benefited from their background knowledge and an educational presentation throughout the day leading up to the survey questionnaire. Without the requisite educational presentations or materials, it would be very difficult for an uninformed audience to respond intelligently to the subjects raised. The project team is confident that the responses given by the educated and informed group are valid and will prove to be a valuable resource during plan development.

Within the *Target Employers and Incentives* section of the survey, participants indicated their support of the following:

- Use of incentives to attract target employers to relocate to the county;
- The creation of new target employers jobs, with a lower emphasis on retention of existing employers; and
- The need to develop guidelines for granting incentives to target employers when they locate in the county.

Within the *Market, Real Estate, and Housing* section of the survey, participants supported the following:

- Identify streamlined development processes that reduce multi-jurisdictional conflicts;
- Implement procedural and incentive mechanisms;
- Negotiate with Florida State agencies for alternative growth management measures;
- Provide multiple infrastructure provision techniques (public, private, exemption) as an incentive;
- Actively support urban (workforce) housing initiatives within mixed-use plans; and
- Permit target employers to locate in multiple identified centers.

Within the *Urban Design and Regulatory Codes* section, participants responded in support of the following:

- Identify revisions of land development regulations that support redevelopment needs;
- Seek regional approvals that support identified target employer locations;
- Coordinate the incentive program countywide;
- Permit higher density/mixed uses in areas supported by the plan;
- Identify alternative incentives (i.e., parking structures, public lands, etc.) to attract target employer redevelopment, and
- Identify techniques and designs that a maturing community will need to ensure that multiple urban forms are provided for within the future redevelopment of the county.

Appendices

- A – Survey Participant’s Information (Compiled by Economic Development)
- B – Tabulated Data Results (Compiled by Pinellas Planning Council)
- C – Miscellaneous Important Issue Summary
- D – Map Series



APPENDIX A, Part 1

Redevelopment Strategies & Policies Summit

Evaluation Survey Results

Summit Evaluation Surveys were distributed during the 2003 Redevelopment Strategies & Policies Summit. Forty-three (43) participants completed the survey and the results are as follows:

How did you learn about the Summit?

- Good Business Pinellas 2% (1)
- Chamber/industry association 7% (3)
- Pinellas County Economic Development personal contact 35% (15)
- Pinellas County Economic Development web page/email 9% (4)
- Pinellas County Economic Development mailing 7% (3)
- Other 30% (13)
 - FMO district meeting 2% (1)
 - League of Women Voters 2% (1)
 - Boss 2% (1)
 - Pinellas Planning Council 5% (2)
 - Prior Summit participant 5% (2)
 - Jim King 2% (1)
 - Commissioner Seel 2% (1)
 - County staff 2% (1)
 - On steering committee 5% (2)
- No Answer 9% (4)

Type of Organization you represent:

- Government 44% (19)
- Chamber of Commerce/industry group 5% (2)
- Non-profit/citizens group 9% (4)
- Individual 14% (6)
- Business 28% (12)
 - Transportation consultant 2% (1)
 - Consultant 2% (1)
 - Real estate 7% (3)
 - Developer 2% (1)
 - Engineering 5% (2)
 - Community consultant 2% (1)
 - Financial 2% (1)
 - Education 2% (1)
 - Construction 2% (1)
 - No Answer 72% (31)

Organization location?

- Pinellas County 81% (35)
- Other 7% (3)
- No Answer 12% (5)

How Would You Rate?

Strategies & Policies Summit Overall

- Highest satisfaction 42% (18)
- Somewhat high satisfaction 40% (17)
- Neutral satisfaction 7% (3)
- No Answer 12% (5)

Project Overview Section

- Highest satisfaction 44% (19)
- Somewhat high satisfaction 33% (14)
- Neutral satisfaction 12% (5)
- Lowest satisfaction 2% (1)
- No Answer 9% (4)

Lunch Program

- Highest satisfaction 54% (23)
- Somewhat high satisfaction 37% (16)
- Neutral satisfaction 2% (1)
- No Answer 7% (3)

Opening/Wrap-up Section

- Highest satisfaction 23% (10)
- Somewhat high satisfaction 26% (11)
- Neutral satisfaction 16% (7)
- Somewhat low satisfaction 7% (3)
- Lowest satisfaction 2% (1)
- No Answer 26% (11)

How Relevant Were the Sections You Attended?

Introductions & Overview

Importance to County Economy

- Highest relevance 51% (22)
- Somewhat high relevance 37% (16)
- Neutral 5% (2)
- No Answer 7% (3)

Repositioning Our Planning

- Highest relevance 54% (23)
- Somewhat high relevance 40% (17)
- Neutral 2% (1)
- No Answer 5% (2)

Building Better Jobs & Community

- Highest relevance 65% (28)
- Somewhat high relevance 26% (11)
- Neutral 2% (1)
- Lowest relevance 2% (1)
- No Answer 5% (2)

Plan Strategies & Policy Directions

Plan Project Overview

- Highest relevance 33% (14)
- Somewhat high relevance 47% (20)
- Neutral 7% (3)
- Somewhat low relevance 5% (2)
- Lowest relevance 2% (1)
- No Answer 7% (3)

Target Industries/Incentives

- Highest relevance 51% (22)
- Somewhat high relevance 37% (16)
- Neutral 2% (1)
- Somewhat low relevance 2% (1)
- No Answer 7% (3)

Market Real Estate Strategies

- Highest relevance 35% (15)
- Somewhat high relevance 49% (21)
- Neutral 7% (3)
- Lowest relevance 2% (1)
- No Answer 7% (3)

Urban Design Policies

- Highest relevance 54% (23)
- Somewhat high relevance 33% (14)
- Neutral 7% (3)
- No Answer 7% (3)

Questions & Answers

- Highest relevance 23% (10)
- Somewhat high relevance 28% (12)
- Neutral 21% (9)
- Somewhat low relevance 12% (5)
- Lowest relevance 2% (1)
- No Answer 14% (6)

Plan Strategies & Policy Workshop

Leadership Overview

- Highest relevance 35% (15)
- Somewhat high relevance 35% (15)
- Neutral 14% (6)
- Somewhat low relevance 5% (2)
- Lowest relevance 2% (1)
- No Answer 9% (4)

Strategy & Policy Framework

- Highest relevance 26% (11)
- Somewhat high relevance 49% (21)
- Neutral 16% (7)
- Somewhat low relevance 2% (1)
- No Answer 7% (3)

Strategy & Policy Evaluation & Ranking

- Highest relevance 26% (11)
- Somewhat high relevance 42% (18)
- Neutral 12% (5)
- Somewhat low relevance 5% (2)
- Lowest relevance 5% (2)
- No Answer 12% (5)

Participants Report Out

- Highest relevance 12% (5)
- Somewhat high relevance 33% (14)
- Neutral 12% (5)
- Somewhat low relevance 5% (2)
- Lowest relevance 5% (2)
- No Answer 35% (15)

Single Most Important Issue

- Twenty-nine (29) comments

Additional Comments

- Twenty-two (22) comments

E-mail addresses requesting *Tips, Trends & Technology*

- Ten (10) requests

Prepared by Pinellas County Economic Development Research Division
November 4, 2003



APPENDIX A, Part 2

**Redevelopment Strategies & Policies Summit
for the Pinellas Community**

(1 = Target Industry Related, 2 = Market Related, 3 = Urban Deign Related, x = other)

Single Most Important Issue:

Grouping	Comment
1	Case 9: Jobs
1	Case 11: Understanding the need for improved public direction/participation redevelopment process
1	Case 15: Branding the community
1	Case 16: Creating better jobs with emphasis on targeted industries
1	Case 22: Recruiting businesses and transportation
1	Case 26: We are moving forward before it is to late!
1	Case 28: Job creation, need for targeted incentives – performance based
1	Case29: To prepare you now and future of our county luring recreation and jobs
1	Case 30: Governmental cooperation moving forward on redevelopment
1	Case 36: Identifying and acquiring a source or sources of funds to purchase real estate of sufficient acreage to group now projects of a significant nature
1	Case 38: Municipal/County collaboration; public support for public incentives
1	Case 41: Target industry green
2	Case 1: Preservation and Mobile Home 55+ Communities
2	Case 6: Restructuring development codes for redevelopment
2	Case 8: Change the entitlement hurdles – to delay the project it is of no benefit
2	Case 27: Changing land use to higher density, mixed use and incentives
2	Case 32: Need to review John Landon’s comments
2	Case 37: Commitment to a planning process and authority to act
3	Case 4: Premium transit, transit/bicycle/pedestrian friendly development
3	Case 14: Based on audience questions – traffic congestion & mobility
3	Case 20: Creating a sense of place and centralizing lifestyle centers and activity/entertainment centers
3	Case 33: Transportation
3	Case 43: Maintaining neighborhood character while in the process of redevelopment. Equally important is mass transit.
X	Case 17: Transportation, Economic Development and land use planning are integrated and should be addressed together.
X	Case 18: A composite of this concept and the reasons must be shared with the public.
X	Case 34: Quality of life balanced with solid economic base
X	Case 35: Focusing on the future of Pinellas community
X	Case 39: Future development
X	Case 42: Monitoring character of county and quality of life for low income as well as the rest of the population.



**Redevelopment Strategies & Policies Summit
for the Pinellas Community**

**(O = Organizational Comment, P = Positive Comment,
IC = Intergovernmental Coordination Comment, X = other)**

Additional Comments:

O	Case 13: Too long of a day with no breaks. Information overload. Survey at the end was when everyone was whipped and it was very long.
O	Case 14: Needed AM and PM break – sitting for 4 straight hours can be difficult and shortens attention span. I do not see the combination of transportation demand management and redevelopment planning process.
O	Case 17: This session should not have been scheduled to conflict with FRA conference
O	Case 18: Answers should be BRIEF. They stretched on and on, especially by the consultant/moderator.
O	Case 30: I would like to visit these issues in greater detail at a slower pace so I can understand better.
O	Case 31: Seating too close together (uncomfortable); rambling speakers (many people began to or lost interest); need breaks (AM & PM); registration needs to include dietary concerns (member of our group can only have soup and no coffee was available for afternoon session).
O	Case 34: Involve a better cross-section of the Pinellas community (basically middle income class, government officials and developers represented)
O	Case 38: Try to keep meetings/summits mid county – Ulmerton Road? Morning break was needed; to do otherwise subjects speaker to people leaving and entering room.
P	Case 19: Great speakers – Concepts need to be publicized to gain greater public support.
P	Case 26: Great
P	Case 35: I feel lucky to be in the venue of life with so many caring people in our community
P	Case 39: Excellent
IC	Case 29: All forms of government need to stop fighting and partner on the whole, issues not just small parts and get out to public the change needed and why.
IC	Case 32: Should address educational institutions and impact on development
X	Case 1: I felt presenters lacked an understanding or appreciation or knowledge of retiree needs, mobile home communities, and/or historical preservation of how most of us got here.
X	Case 5: Re: mass transit...you can only cram so much down a person's throat before he/she throws up
X	Case 8: There are so few employment nodes – amend the plan to accommodate the maximum redevelopment potential upfront. The plan should be encouraging public-private ventures and the plan should be very supportive of environment domain to assemble useable tracts.
X	Case 9: How can we keep jobs when Washington has policies to encourage a global market
	Case 23: Need more discussing on tourism industry and its impact on County economy. Policy decisions to help foster redevelopment of hotels on the barrier islands. Currently condos are replacing hotels.



X	Case 36: Take the laser pointer away from James Moore
X	Case 42: Terminology not made clear to lay person CBD, CPR, HDR
X	Case 43: To get more input from the community you <u>must</u> get neighborhood organizations involved. People are only interested in what will affect them personally.

Prepared by Pinellas County Economic Development Research Division (Grouping by Team)
November 4, 2003



APPENDIX B



Regulation Criteria Sorted by "Total Most + Somewhat Important"		Most Important	Somewhat Important	Neutral / No Opinion	Less Important	Not Important	Total Respondents	Total Most + Somewhat Important	Ranking	Total Less + Not Important	Ranking
5	Land development regulations should be revised to promote redevelopment by encouraging mixed use and urban densities.	45%	45%	8%	1%	0%		90%	1	1%	5
		32	32	6	1	0	71				
9	The preparation of model or prototype regulations for redevelopment for utilization by local government is essential.	49%	41%	10%	0%	0%		90%	1	0%	6
		34	28	7	0	0	69				
2	Areawide Developments of Regional Impact (DRI) should be one of the tools for securing development rights and streamlining development approvals.	49%	39%	6%	4%	1%		89%	2	6%	3
		35	28	4	3	1	71				
7	The Countywide Future Land Use Map should contain a mechanism to reflect identified employment centers.	51%	37%	7%	3%	3%		87%	3	6%	3
		36	26	5	2	2	71				
4	There should be a countywide, government-sponsored community redevelopment program created to serve as one of the tools for attracting target employers.	51%	34%	11%	3%	0%		86%	4	3%	4
		36	24	8	2	0	70				
6	Local land development regulations should be revised to better integrate and streamline separate parts of the development review process such as special exceptions, variances (i.e. non-conformities flexibility), site plan review, and rezoning.	56%	30%	13%	0%	1%		86%	4	1%	5
		39	21	9	0	1	70				
8	Land development regulations should be flexible with regard to the needs to stimulate redevelopment.	52%	34%	6%	6%	3%		86%	4	8%	1
		37	24	4	4	2	71				
3	Government initiated DRI or areawide plans should be prepared to facilitate redevelopment in designated employment centers.	45%	39%	8%	7%	0%		85%	5	7%	2
		32	28	6	5	0	71				
10	Consistent code enforcement standards and procedures on a countywide basis will be important to the overall redevelopment effort.	57%	28%	8%	4%	3%		85%	5	7%	2
		41	20	6	3	2	72				
1	Land use and zoning regulations should be adopted that allow and facilitate the location of target employers.	60%	22%	18%	0%	0%		82%	6	0%	6
		44	16	13	0	0	73				

Urban Criteria Sorted by "Total Most + Somewhat Important"		Most Important	Somewhat Important	Neutral / No Opinion	Less Important	Not Important	Total Respondents	Total Most + Somewhat Important	Ranking	Total Less + Not Important	Ranking
1	Transit oriented development requires higher density/mixed-use near transit stations. Redevelopment plans should provide increased densities within a ½-mile of the stations.	65%	32%	3%	0%	0%		97%	1	0%	8
		47	23	2	0	0	72				
3	Government provided incentives should include those for structured parking (e.g., parking garages).	40%	51%	3%	4%	3%		90%	2	7%	4
		29	37	2	3	2	73				
9	The urban form presented today, including urban, town, and community centers, should be reflected in and reinforced by local government and countywide plans.	58%	32%	6%	3%	1%		90%	2	4%	6
		42	23	4	2	1	72				
8	Non-essential public lands, i.e. those not including parks or environmentally sensitive land, should be considered for conversion for use by targeted employers.	52%	37%	6%	1%	4%		89%	3	6%	5
		37	26	4	1	3	71				
2	Higher density/mixed-use development requires limiting the amount of land used for parking. To promote this type of development, government should adopt standards to limit the number of surface parking spaces.	36%	50%	4%	6%	4%		86%	4	10%	2
		26	36	3	4	3	72				
5	The Pinellas community should offer a range of urban centers: city centers (downtowns), regional centers (shopping and employment), towns, and community and neighborhood centers.	68%	17%	11%	3%	1%		85%	5	4%	6
		48	12	8	2	1	71				
7	The pre-WWII model of compact, walkable, mixed-use neighborhoods is the preferred means to move the Pinellas Community from a suburban to an urban form.	36%	43%	7%	8%	6%		79%	6	14%	1
		26	31	5	6	4	72				
6	The proposed transportation / district / centers structure as presented, is the ideal future urban form for Pinellas County.	24%	43%	30%	2%	0%		67%	7	2%	7
		11	20	14	1	0	46				
4	Employment areas that are primarily industrial should be retrofitted or redeveloped to include more than one use.	36%	29%	25%	8%	1%		65%	8	10%	3
		26	21	18	6	1	72				

Government Criteria Sorted by "Total Most + Somewhat Important"		Most Important	Somewhat Important	Neutral / No Opinion	Less Important	Not Important	Total Responses	Total Most + Somewhat Important	Ranking	Total Less + Not Important	Ranking
8	Development approvals for target industry projects in identified redevelopment areas should be processed in a streamlined manner by the appropriate regulatory agency.	83%	11%	3%	3%	0%		94%	1	3%	9
		59	8	2	2	0	71				
9	For the purpose of facilitating redevelopment on a coordinated basis countywide, a structured process for intergovernmental coordination is essential.	76%	16%	6%	1%	0%		93%	2	1%	10
		52	11	4	1	0	68				
7	Because Pinellas County has limited ability to expand the capacity of its roadway system, we should review the requirements for concurrency exclusion zone(s) to accommodate redevelopment and encourage transit use.	56%	36%	4%	1%	3%		92%	3	4%	8
		41	26	3	1	2	73				
10	The countywide plan should enable the organizational and procedural mechanisms needed to implement the <i>Economic Development and Redevelopment Plan for the Pinellas Community</i> .	76%	11%	8%	3%	3%		86%	4	5%	7
		56	8	6	2	2	74				
1	<i>The Economic Development and Redevelopment Plan for the Pinellas Community</i> should be directed at new policy relationships with the State of Florida through the countywide plan process to address infill, redevelopment, and economic development issues in a built-out county.	54%	31%	7%	6%	1%		86%	5	7%	6
		38	22	5	4	1	70				
4	Pinellas County government should take the lead in creating a tax incentive program by initiating the appropriate ordinance or referendum action.	33%	45%	13%	7%	1%		78%	6	9%	5
		22	30	9	5	1	67				
3	The management of the targeted employers incentive program should be centralized and assigned to an economic development and/or redevelopment agency on a countywide basis.	44%	33%	11%	5%	7%		77%	7	12%	3
		32	24	8	4	5	73				
2	To implement the Plan, local governments should make a commitment to fund capital improvement needs.	40%	34%	15%	10%	1%		74%	8	11%	4
		29	25	11	7	1	73				
6	Surrounding greenfield communities are raising impact fees. In a built-out community, impact fees and other infrastructure contributions be reduced or eliminated as a redevelopment incentive.	25%	40%	15%	14%	6%		65%	9	19%	2
		18	29	11	10	4	72				
5	Businesses locating or expanding in Pinellas County should be required to contribute to the upgrading of aging infrastructure.	30%	23%	28%	17%	3%		52%	10	20%	1
		21	16	20	12	2	71				

Land Criteria Sorted by "Total Most + Somewhat Important"		Most Important	Somewhat Important	Neutral / No Opinion	Less Important	Not Important	Total Responses	Total Most + Somewhat Important	Ranking	Total Less + Not Important	Ranking
10	To encourage shorter commuting times, it is appropriate to permit some mid to high-density residential development within employment centers and within ½-mile of those centers, such as a 1.5 to 2.5 multiplier of underlying density.	49%	39%	7%	4%	1%		87%	1	6%	9
		34	27	5	3	1	70				
8	Because the cost of redevelopment is greater than that for greenfields development, government should partner with developers and provide incentives to reduce those costs.	23%	61%	6%	8%	3%		83%	2	11%	4
		16	43	4	6	2	71				
4	It is important to have housing in proximity to employment areas in order to reduce travel costs and time.	57%	25%	8%	8%	1%		82%	3	10%	6
		41	18	6	6	1	72				
6	Local governments should install infrastructure, such as stormwater drainage facilities and structured parking, as incentives to attract target employers.	43%	38%	15%	4%	0%		81%	4	4%	10
		32	28	11	3	0	74				
13	Community consensus exists for support of the primary target employers. The Plan should also address redevelopment actions needed to support the county's tourism industry.	40%	41%	10%	7%	1%		81%	4	9%	7
		27	28	7	5	1	68				
1	In Pinellas County 54% of the total population is employed. Employment of a greater percent of the population should be a countywide goal.	22%	57%	13%	7%	1%		79%	5	8%	7
		16	41	9	5	1	72				
5	Local governments should assemble land as an incentive to attract target employers.	52%	27%	11%	8%	1%		79%	5	10%	6
		37	19	8	6	1	71				
2	Employment centers should be primary locations for future target employers.	31%	43%	20%	5%	0%		74%	6	5%	9
		23	32	15	4	0	74				
9	Local governments should be willing to make investments that will produce long-term economic gains in distressed areas even if there is limited monetary return on the investment.	27%	37%	31%	6%	0%		63%	7	6%	8
		19	26	22	4	0	71				
7	The four proposed county districts (South, South Central, North Central and North) should be considered as equally appropriate locations for target employers.	25%	37%	16%	16%	5%		63%	8	21%	1
		19	28	12	12	4	75				
12	For the purpose of assembling developable workforce housing sites, government should use their power of eminent domain to acquire holdout parcels if the assembly is substantially complete.	27%	34%	21%	13%	4%		61%	9	17%	2
		19	24	15	9	3	70				

Land Criteria Sorted by "Total Most + Somewhat Important"		Most Important	Somewhat Important	Neutral / No Opinion	Less Important	Not Important	Total Responses	Total Most + Somewhat Important	Ranking	Total Less + Not Important	Ranking
11	For the purpose of assembling developable workforce housing sites, government should enter into agreements with private real estate companies to secure purchase options or listing agreements.	23%	32%	29%	12%	4%		55%	10	16%	3
		16	22	20	8	3	69				
3	The Gateway area is and should continue to accommodate the predominant share of target employers.	18%	35%	38%	7%	3%		53%	11	9%	5
		13	26	28	5	2	74				

APPENDIX C

Miscellaneous Important Issue Summary

Redevelopment Strategies & Policies Summit for Pinellas County - 2003
(1 = Target Industry Related, 2 = Market Related, 3 = Urban Design Related, x = other)

Grouping	Comment
1	Jobs and economics are understood as the key driver of the plan.
1	Transportation and Job attraction are strongly linked.
1	Early action on job generation is critical.
1	We need to be able to monitor performance on plan implementation is jobs and investments.
1	Elevating all economic levels of the community through the quality of life defined by the plan.
1	Recruitment and development incentives, are necessary to attract employers.
2	Focus large site opportunities for significant contributory job attraction.
2	Residential, condo vs. tourism issue needs forum and solutions for action.
2	Use non-essential public lands as an incentive to attract target employers.
3	The community image and plan image could be stronger if we were clear on "Branding" what Pinellas is and what it wishes to be come.
3	Code change develops positive and negative reactions such as were heard after John Landon made his recommendations.
3	Creating a sense of place in critical
3	Transit Planning county wide has not devised an set of champions supportive of the concept
3	Make plan respond to market opportunities
3	Transit can be a catalyst for economic development and urban form.
3	Need to address the land value of the development cost equation.
3	Coordinate transit planning and redevelopment planning
3	Revise codes to achieve desired redevelopment trends.
X	Governmental cooperation is key and we see for much disconnect on issues in Pinellas assembly discussions that this plan may need to be format for consensus.
X	Comment topics that comment implication summary or plan that should be considered in plan development.
X	Get a better cross section of Pinellas community and test plan assumption and directions calls for a survey technique to get data from a bigger random stable balanced population.
X	All day meetings are hard on participants and participation consider dispensed meeting for draft plan.
X	Develop PR program for Draft Plan effort.
X	Have plan show ways for intergovernmental partnering.
X	Define and develop educational institution roles and involvement in plan.
X	Develop format for neighborhood review and involvement in draft plan concepts.



APPENDIX D