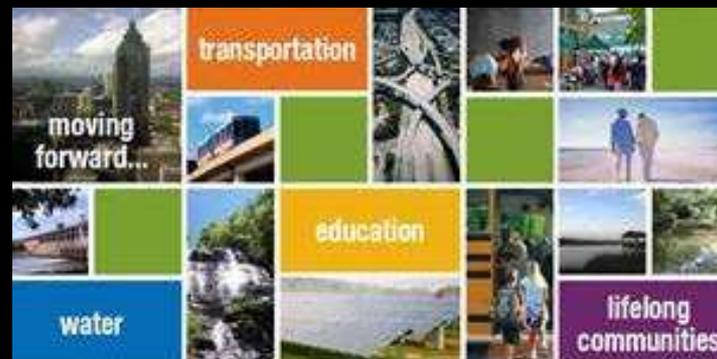
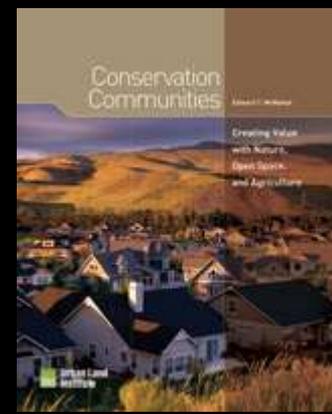


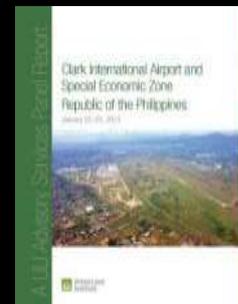
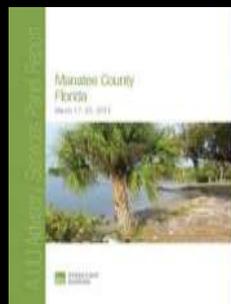
About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- ULI is a membership organization with nearly 30,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.
- What the Urban Land Institute does:
 - Conducts Research
 - Provides a forum for sharing of best practices
 - Writes, edits and publishes books and magazines
 - Organizes and conducts meetings
 - Directs outreach programs
 - Conduct Advisory Services Panels



The Advisory Services Program

- Since 1947
- 15 - 20 panels a year on a variety of land use subjects
- Provides independent, objective candid advice on important land use and real estate issues
- Process
 - Review background materials
 - Receive a sponsor presentation & tour
 - Conduct stakeholder interviews
 - Consider data, frame issues and write recommendations
 - Make presentation
 - Produce a final report



The Panel

CO-CHAIRS

John L. Knott, Jr.
CityCraft Ventures, LLC
Charleston, SC

Charles Long
*Charles A. Long Properties Oakland,
California*

PANELISTS

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Richmond, Virginia

ULI STAFF

Caroline Dietrich
Logistics Manager
Advisory and Education Group

Daniel Lobo
Manager, Awards
Advisory and Education Group



Panel Sponsors

Pasco County

Pasco Economic Development Council

Questions to be addressed by the panel

Pasco is ready to assess progress, celebrate successes, and look to the future for the next steps to become Florida's Premier County for new businesses and quality job creation.

1. Evaluation of Progress to Date – Last Five Years
2009-2013 (20%)
2. Focus Areas for Setting a Direction for the Next Five Years
2014- 2018 (80%)

Strategic Plan - Vision

Pasco, Florida's Premier County

for

Diversified Economic Growth

Environmental Stewardship

and

First Class Service

Strategic Plan - Core Values

Respect
Integrity
Innovation
Service Excellence
Quality

Strategic Plan - Strategic Objectives

Create a Thriving Community

Stimulate Economic Growth

Enhance Quality of Life

Improve Organizational Performance

Social Durability

Each Member of the physical and social community understands the unique history and heritage of the physical and social community

Each member of the community holds in common a vision for the future to which they contribute

Observations and Context - Premier

What we Heard

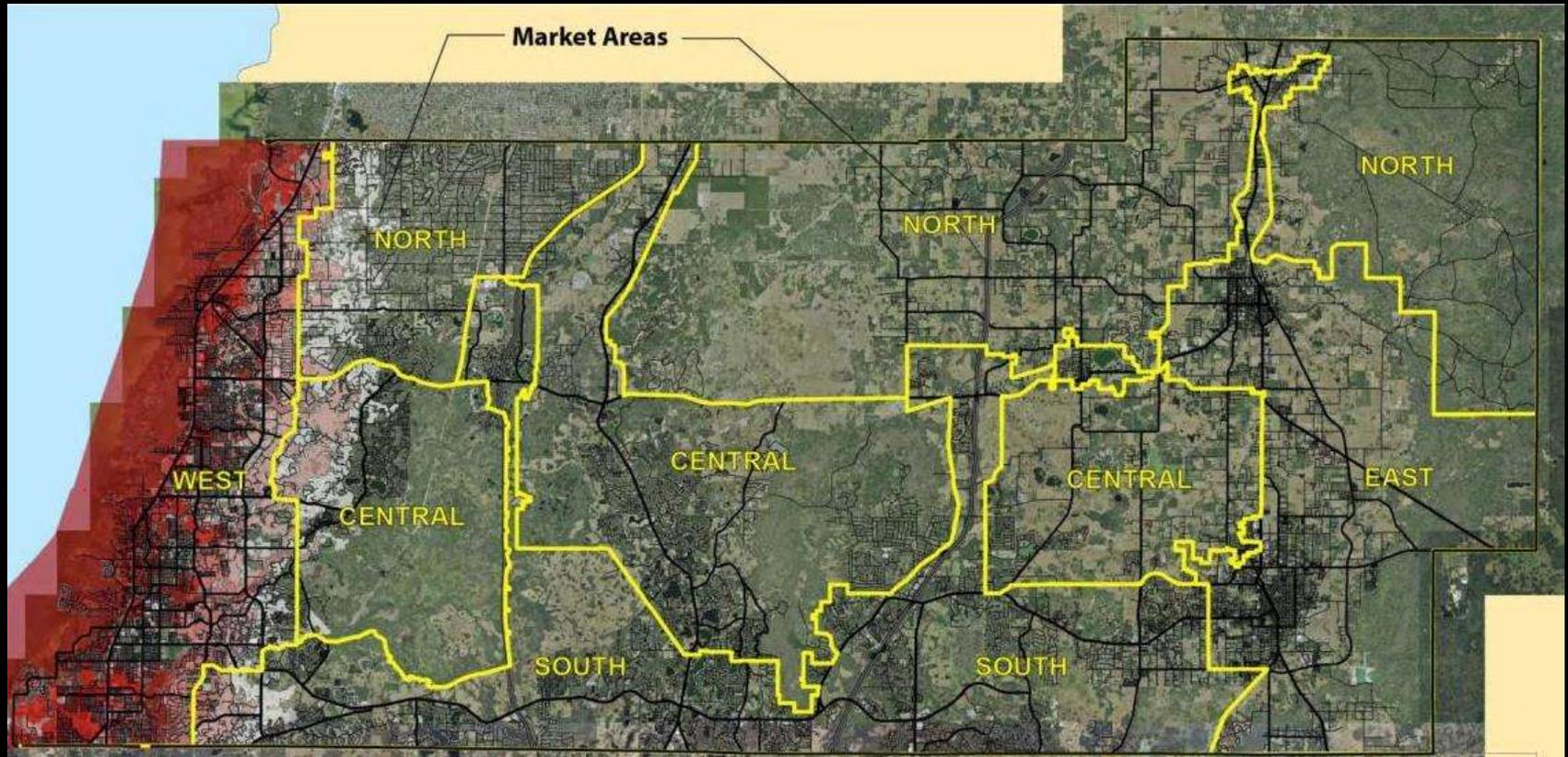
- Sound Tax Base
 - Easy to do Business
 - High Quality -High Paying Jobs
 - Great Libraries, Parks and Schools
- Excellence for Everyone - Live, work, Play
 - Friendly to Diversity
 - Family Friendly
- Collaborative - Working together for sensible solutions
 - Strong Cities and Downtowns
 - Thriving Arts Community
 - Fair & Equitable, Safe and secure
- Overall Health for our People and Natural Assets
- Respect each other - Protect our natural and Cultural assets

ULI Observations and Context – Uniqueness

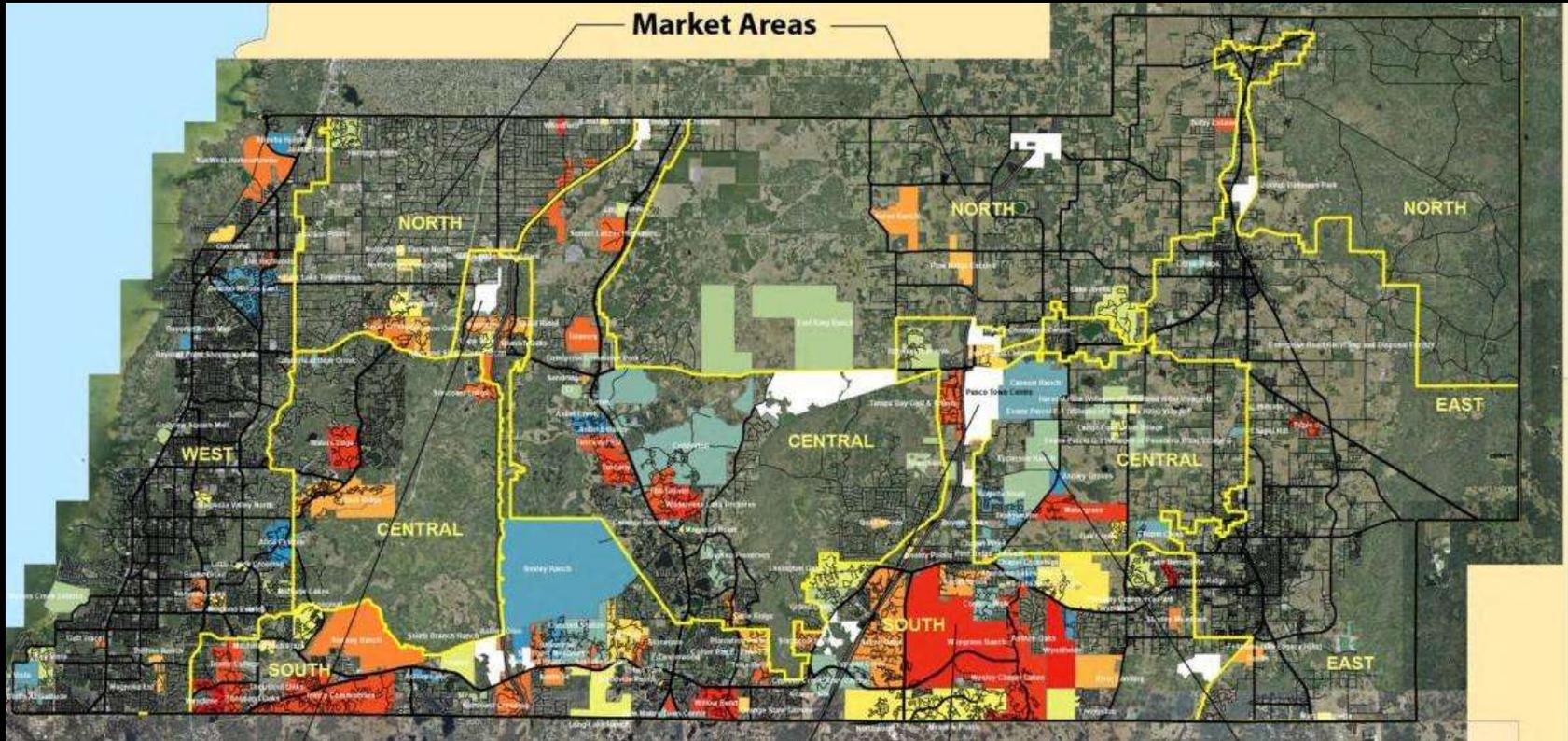
What we Heard

- Green Swamp
 - Rolling Hills
- Historic Cities and towns
 - Coastline Fishing
 - Starkey Park
- Urban Areas in Rural County
 - Agricultural Vistas
- SW Mangroves on Coasts
 - A lot of natural beauty
 - The Highlands
- Diversity of Pasco People and Land
- Diversity of 5 market areas

Observations and Context Market Areas



Observations and Context Development in Context



78831.65 Acres

Impediments—What we heard

“There is no way to attract business to West Pasco—Route 19 is a disaster--- West Pasco is dying”

“Our businesses cannot find a qualified work force—We need a workforce!-- We need business complexes that people can move into—NOT MORE HOUSES”

“We are developing plans, but not accomplishing anything---Plans just get bogged down with too much data and statistics”

“The plan for “premier” is not a real grasp of what Pasco actually is. We do it because we have to, not because it is authentic.--Premier?? That is in-house, not something that is generally understood and accepted”

“Some developers are saying we want the same thing that the County is asking for—A dozen are saying we want to do the same thing we have always done.”

Impediments—What we observed.

ABSORPTION AND PROJECTIONS: “Approved” growth far exceeds the County’s absorption capacity and the rate of absorption is much less than the County’s current projections resulting a rethinking of location and infrastructure capacity.

SUSTAINABLE SITE SYSTEMS: Need better ways to reserve and enhance natural system assets and increase the priority for quality of life services.

TRANSPORTATION PLANNING AND FUNDING: Collaborate on regional transportation solutions. avoid suboptimal local solutions and make transit more of a priority.

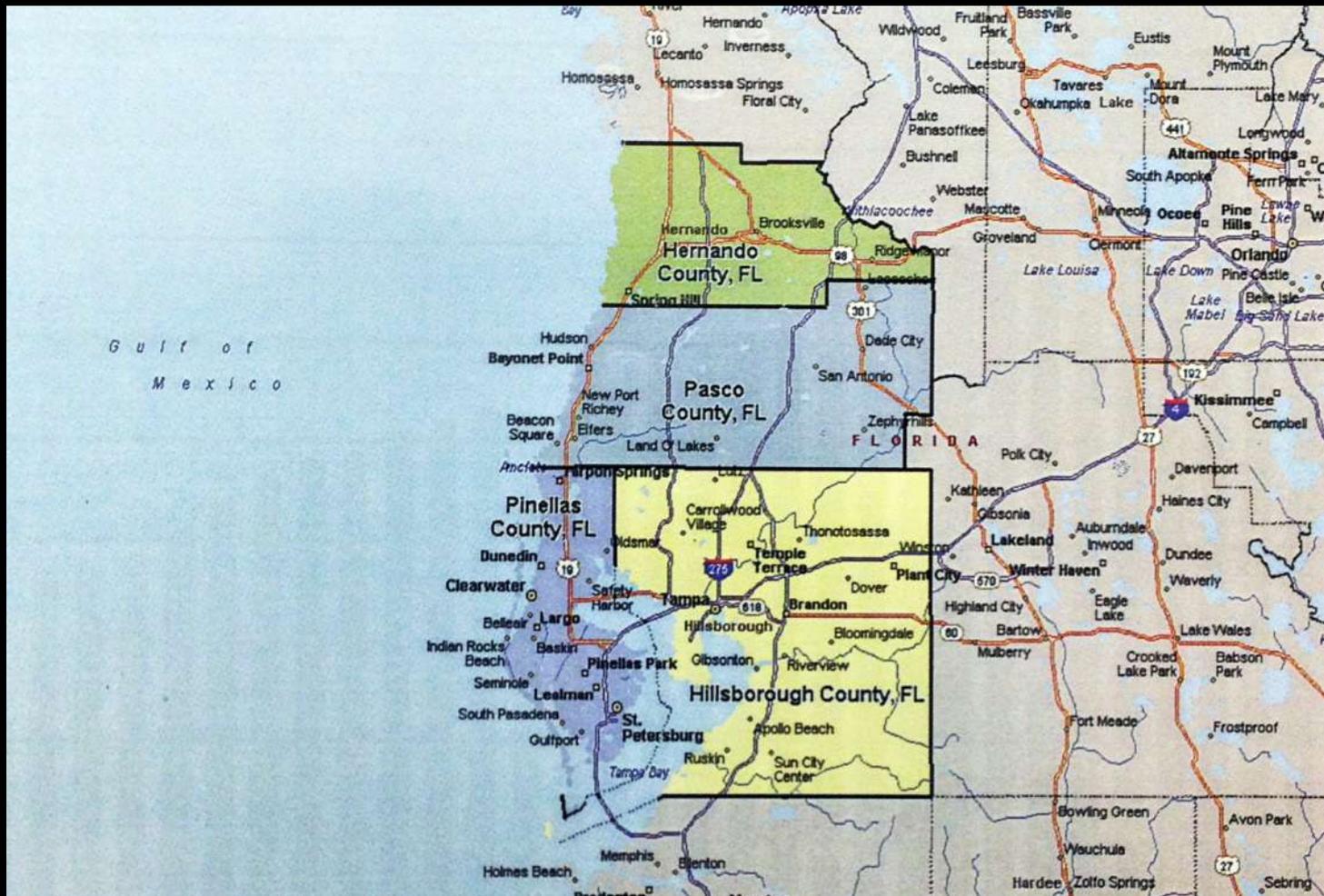
ECONOMIC DEVELOPMENT: Focus on medical and eco-tourism. Create vertical landing spaces. Enhance workforce development.

SHAPING STRATEGIES: Better strategies to shape where,when and how it occurs.

LEADERSHIP: Change old norms. None of the vision will be achieved unless the BOCC and top management are effective leaders.

FISCAL: Fund the vision! Enact the 5 cent gas tax and increase the room tax. Use redevelopment tax increment for site assembly on Route 19.

Absorption and Projections



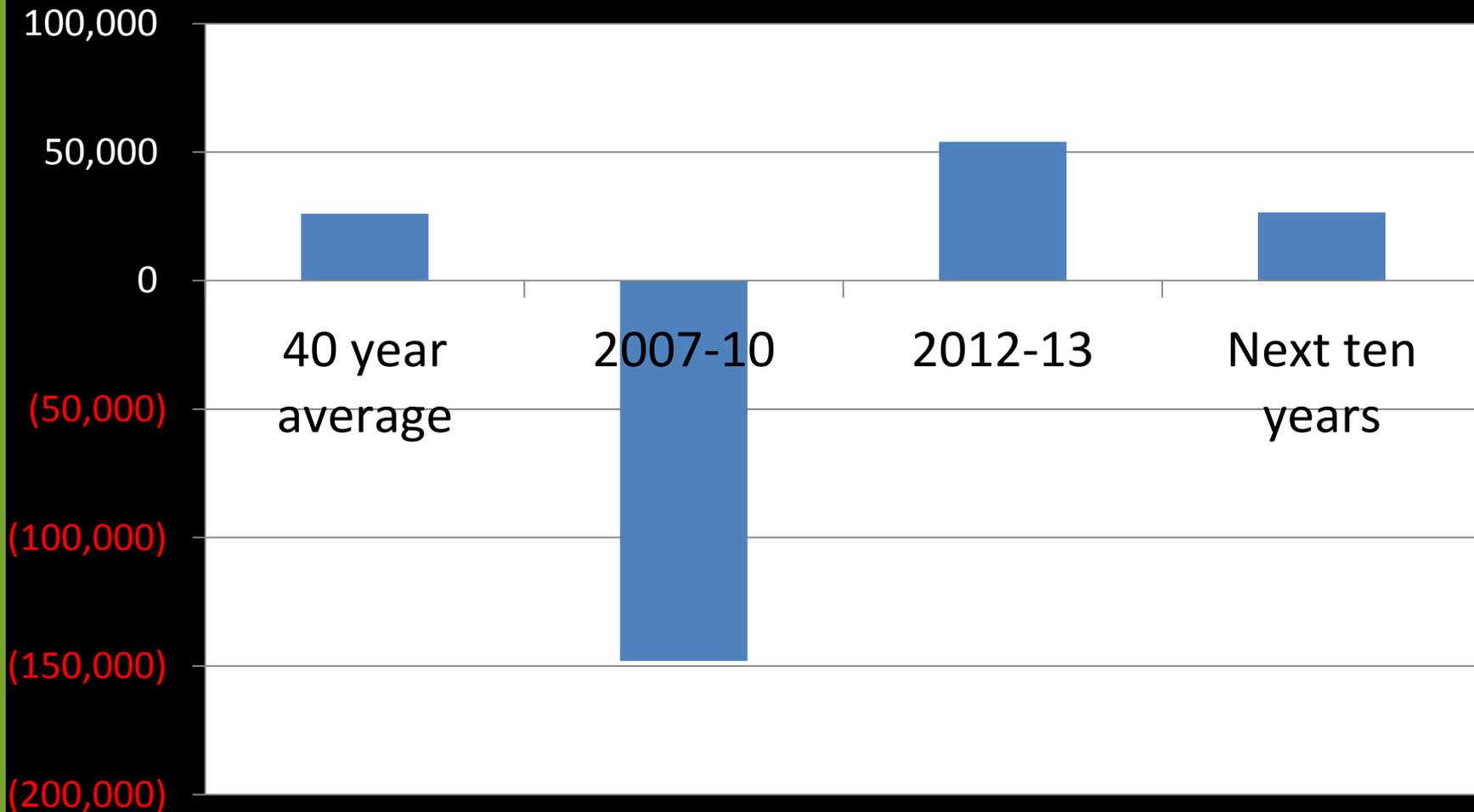
Absorption and Projections

Socio-Economic Trends

	Greater Tampa		Pasco County, FL	
	Base	Annual Projected Growth	Base	Annual Projected Growth
Civilian Employment	1.6 million	25,600	186,000	3,600
Population	2.9 million	53,000	490,000	11,000
Households	1.2 million	21,000	200,000	4,100

Absorption and Projections

Job creation Tampa Region



Absorption and Projections

Residential Construction Trends— Annual

	Tampa Metro		Pasco County, FL	
	Historical	Projected	Historical	Projected
Single Family	13,000	12,000	3,000	2,800
Multifamily	6,500	9,000	700	1,300
TOTAL	19,500	21,000	3,700	4,100

Absorption and Projections

Commercial Markets

	Tampa Metro		Pasco County, FL	
	Inventory	Average Annual Demand	Inventory	Average Annual Demand
Industrial	180 million	2.4 million sf	5.4 million sf	390,000 sf
Office	34 million	2.3 million sf	4.7 million sf	315,000 sf
Retail	67 million	1.0 million sf	13.0 million sf	240,000 sf
Hotel	29,500 rooms	650 rooms	2,700 rooms	70 rooms

Absorption and Projections

Projected Pasco County Annual Land Absorption

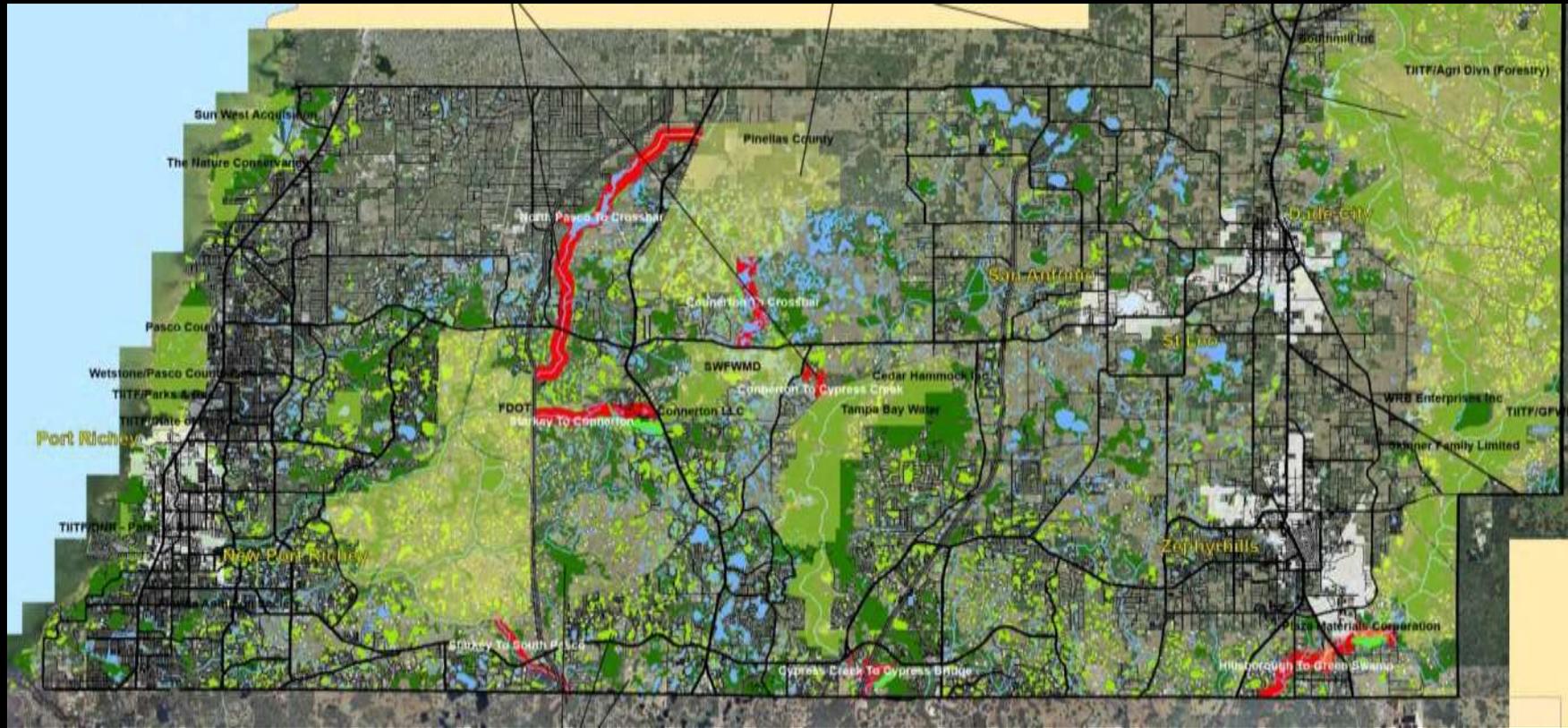
	Acres
Single Family	570
Townhomes & Condominiums	100
Rental Apartments	90
Industrial	25
Office	30
Retail Commercial	25
Hotels	2
Roads & Open Space	280
TOTAL Annual Land Demand	1,122

75 YEARS

Sustainable Site Systems: Natural, Cultural & Infrastructural

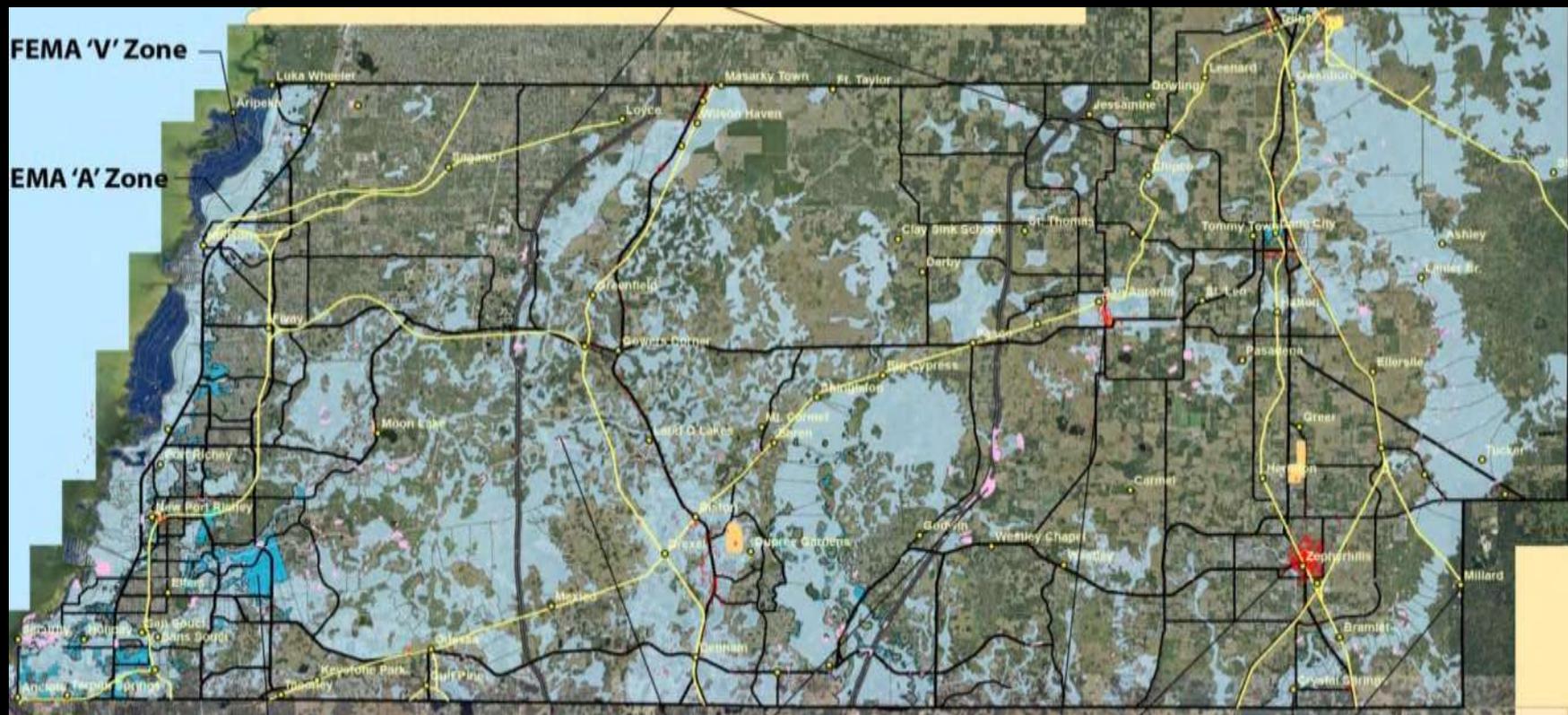


Pasco County's Conservation Planning – setting the framework



- more than 30,000 ac of land and critical linkage assembled through the Pennies for Pasco and transfer development rights programs

Pasco County's Conservation Planning – increasing need



- coastal and inland inundation areas
- coastal resiliency buffer
- mitigation of heat island effect and air quality degradation

Expanded Ecological Connectivity & Linkage

The map displays Pasco County with various land ownership parcels and ecological corridors. A prominent red line traces a path from the Gulf of Mexico coast in the west, through the center of the county, and towards the Green Swamp in the east. Other red lines indicate additional corridors. Labels on the map include: Sun West Acquisition, The Nature Conservancy, Pinellas County, South Pasco, PDOT, SWFWMD, Cedar Hammock Inc, Tampa Bay Water, Zephyrhills, and others. Two inset photographs are included: one on the right showing a dense forest with a large tree, and one on the left showing a grassy field with a tree.

Open Space & Agricultural Preservation Trust Fund
to acquire development rights for continuous corridor
from the Gulf to Green Swamp

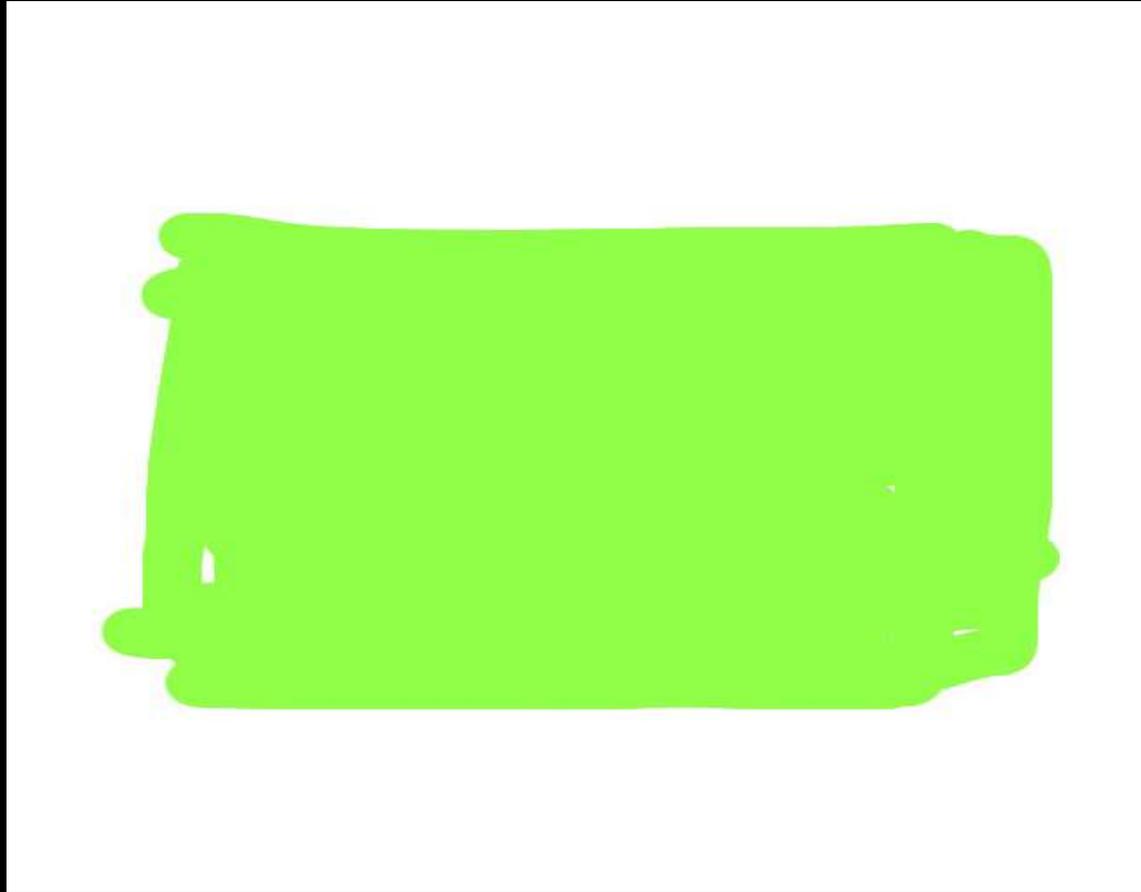
Infrastructure Systems: Water

- Pasco County 10 Yr Water Supply Plan
- Pasco Co Utility has implemented water recycling and reuse programs
- Water supply from Tampa Bay Water is not a current concern
- Desalinization Plant– costs, energy intensive, plant expansion to meet demand, brackish water at intake, ecological consequences
- “One Water” hydrologic cycle – requires cross agency collaboration

Low Impact Development (LID) Strategies

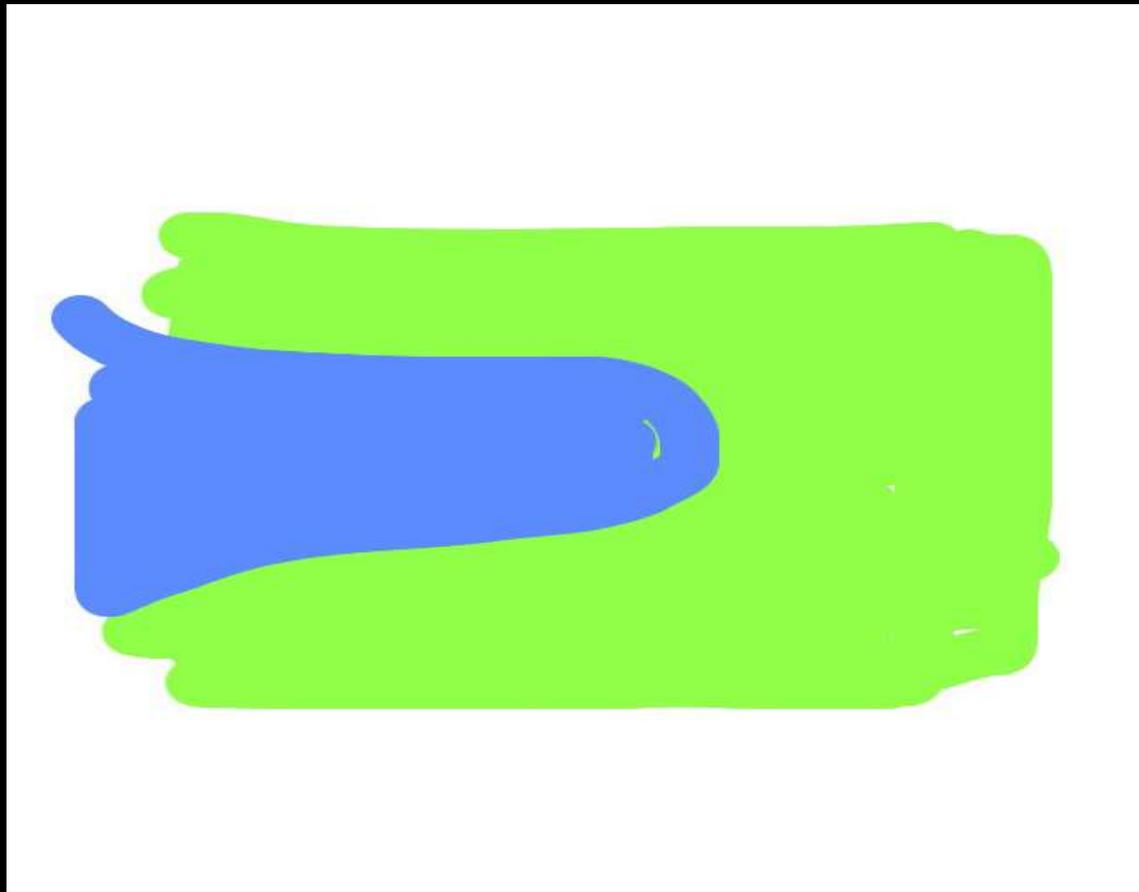


Integrated Systems Planning & Design



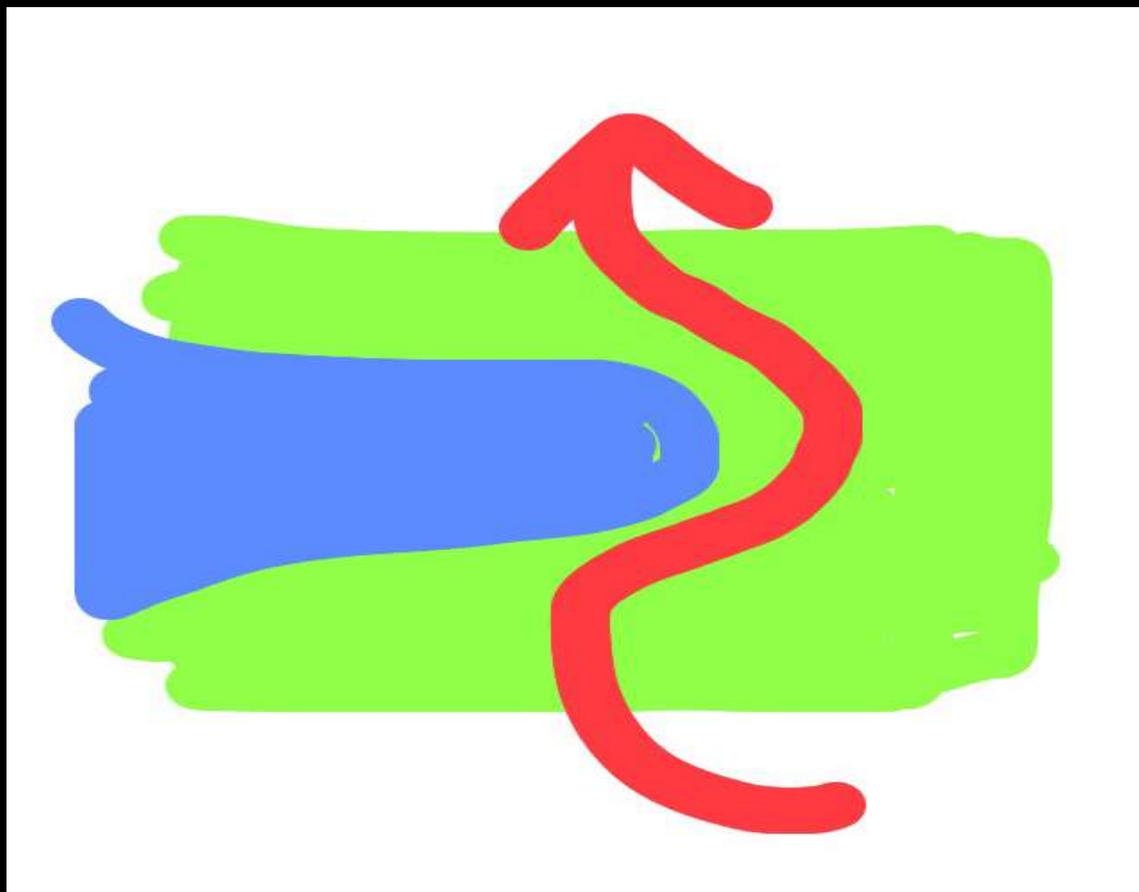
Park

Integrated Systems Planning & Design



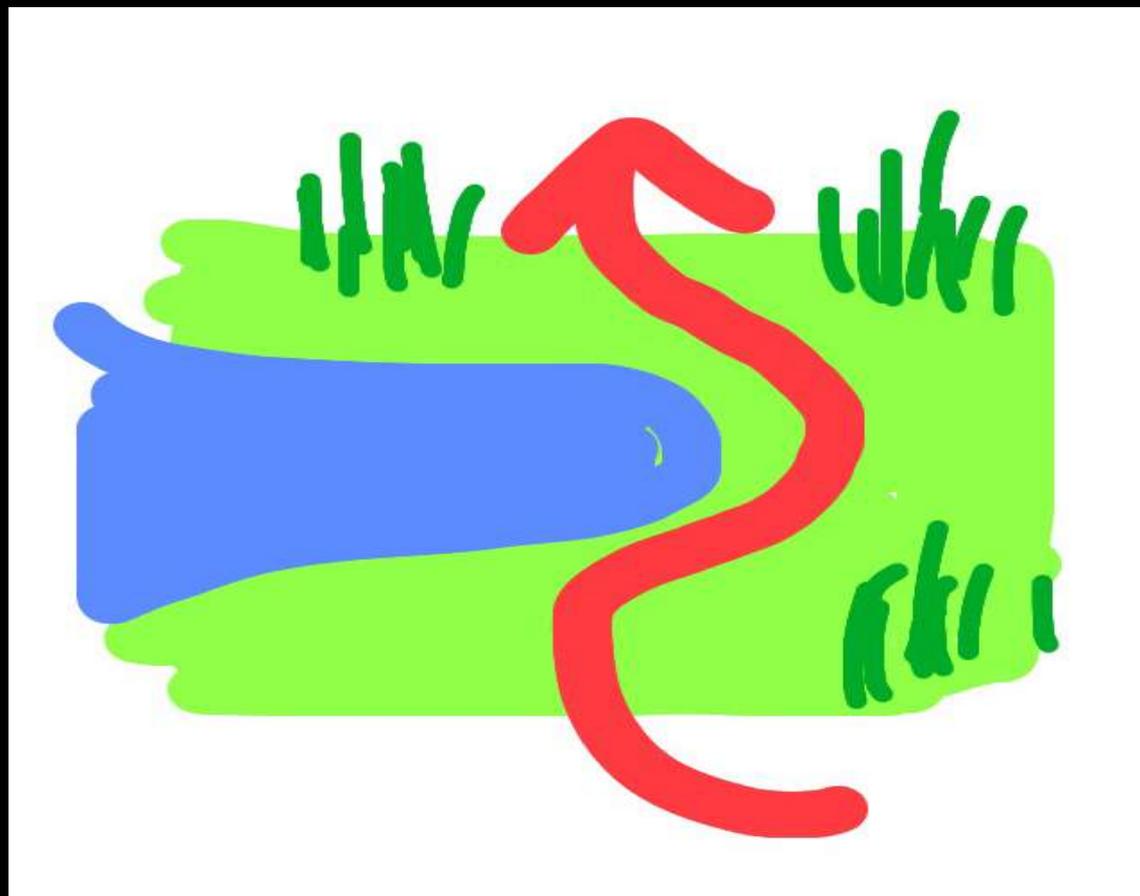
Park + Storm Water

Integrated Systems Planning & Design



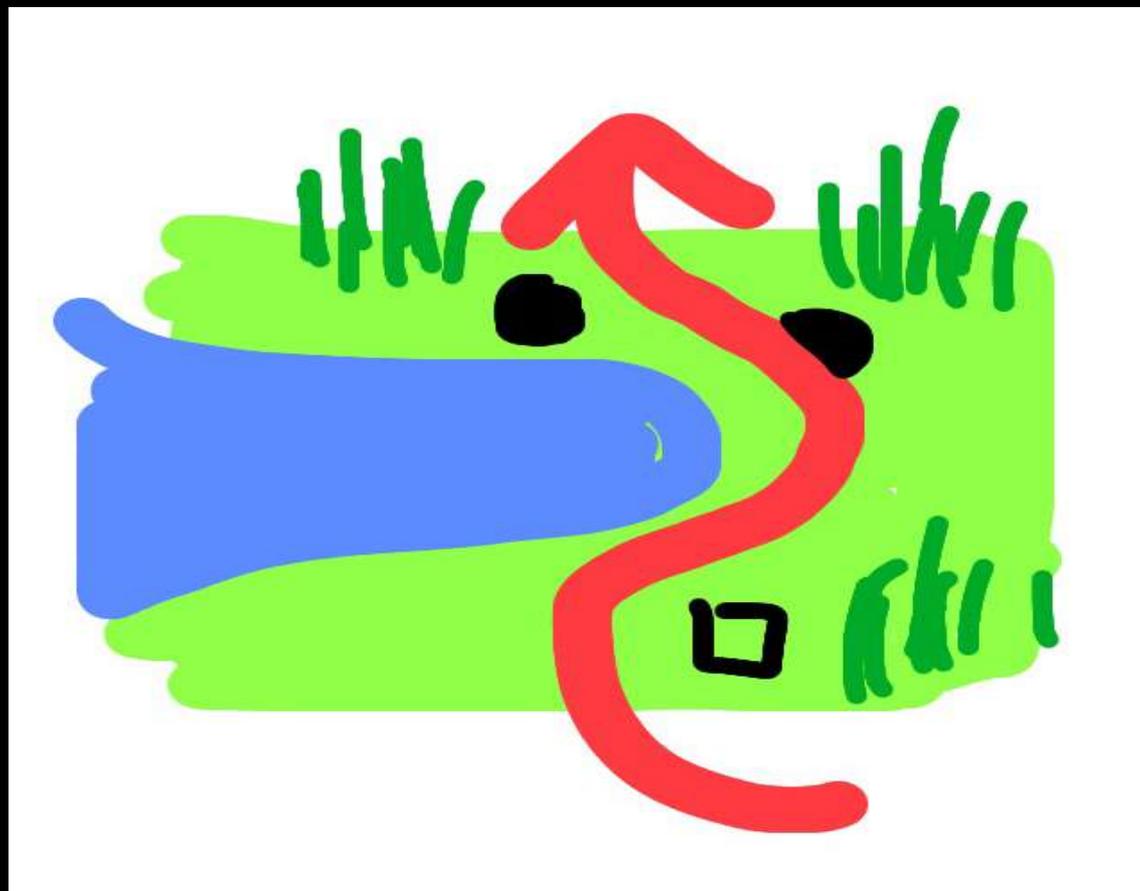
Park + Storm Water + Bike Path

Integrated Systems Planning & Design



Park + Storm Water + Bike Path + Gardens

Integrated Systems Planning & Design



Park + Storm Water + Bike Path + Gardens + Art

Sustainable Systems Recommendations

- Expand Ecological Planning and create ecological corridor from Gulf to Green Swamp.
- Pursue cross-departmental collaborations for integrated infrastructure solutions with broad benefits.

Sustainable Systems

- Sustainable site systems yield higher performing landscapes and more effective use of financial resources.
- Sustainable systems contribute to social values and the quality of life across Pasco County.
- Sustainable systems are a framework for becoming a premier county.

Transportation and Regional Planning

Pasco County Highlights

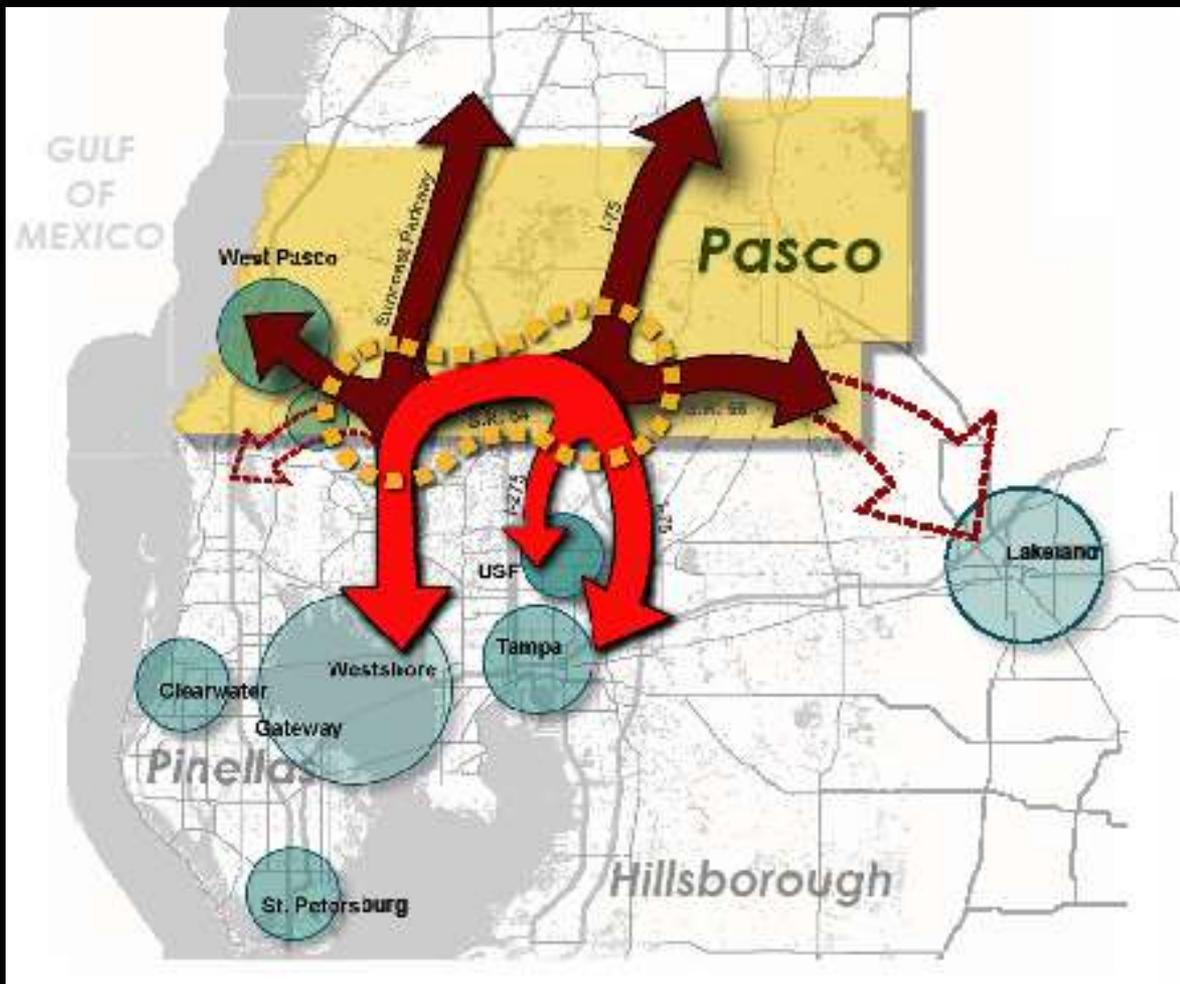
- Around 50 % of workers leave Pasco County every work day
- Population growth to 2025 may be over stated by at least 1/3 (585K versus 642K)
- Other land uses are approved for 75 years of development
- Many approved and proposed land use plans may not account for current demographic realities, life style choices
- Currently there are few or no transit options for most.
- Current transportation infrastructure plans have funding shortfall of \$14B
- Enactment of Mobility Fees based on land use incentives
- Current bottleneck at RT 54 and I-75—Proposal for double decking

Reconfigure Transportation to encourage placemaking and transit

Proposed double decking along Rt 54 compromises placemaking at prime locations



Northern Loop for Tampa Bay Region



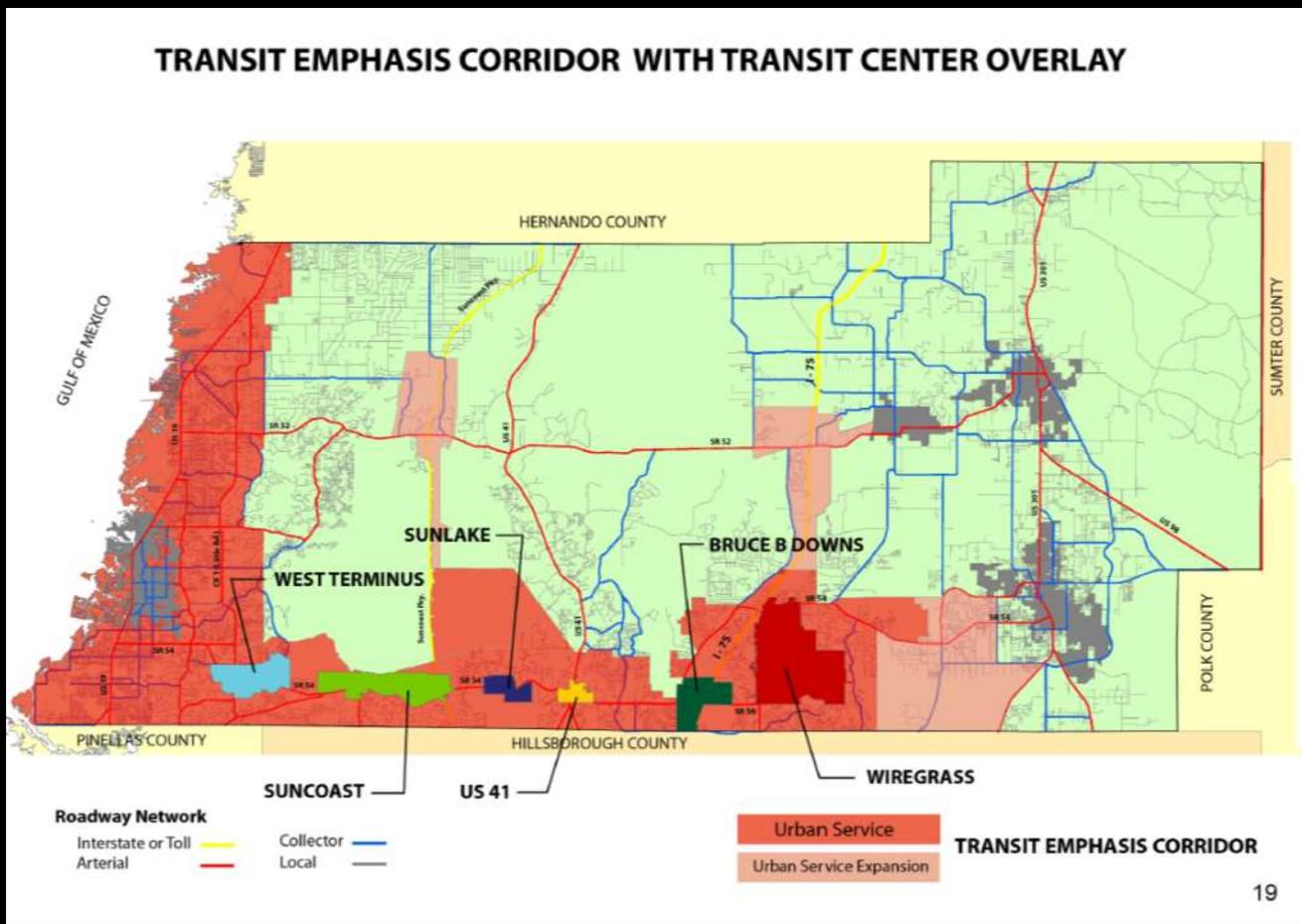
Regional Aspects

- **County and therefore regional transportation modeling may have grossly inaccurate assumptions for Pasco**
- **TBRPA planning efforts curtailed and Tampa/Orlando train nixed**
- **Hillsborough County transit option failed**

Need for Regional Solutions

- **Pasco County and MPO need to step into the void; make solving Rt 54 congestion a regional issue.**
- **Transit development, especially for commuters into Tampa, needs to be looked at more seriously as trip reduction measure**
- **Local development projects can't make up the funding shortfall, even with mobility fees**
- **Multi-county, multi-agency partnerships increase chance for federal funding, e.g., TIGER grants**
- **Prioritize efforts to make “shovel-ready” projects.**
- **Create a multi-county Tampa Metropolitan Planning Organization with regular MPO authority**

Urban Service Areas Major Development Projects



Transportation and Regional Recommendations

- **Consider ULI Tampa to rationalize regional planning issues.**
- **Incorporate physical transit service integration at all major development nodes.**
- **Make BRT services into Tampa a top priority.**
- **At least 5% of all transportation funding should go to advancing public transit in Pasco.**
- **Explore other options to the elevated Rte 54 alternative.**
- **Look to the region for other partnerships**

Economic Development

The most effective economic development strategies are built on existing assets.

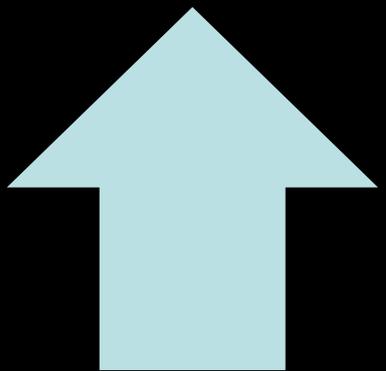
Economic Development

Facts

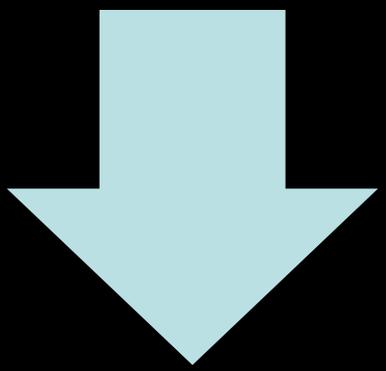
- 69% of Pasco jobs do not require college education
- 52% of Pasco residents have some college education
- Nearly 50% of Pasco's workforce leave the county for work
- 43% of residents travel >30 mins for work

Economic Development

Employment Trends, 2000-2010



- Management & Professional +6%
- Health & Education +3%
- Service +1%
- Professional, Scientific & Management +1%



- Sales -1%
- Retail -3%

Economic Development

Focus on Small Business Growth

86%
**Small
Businesses**

=

75%
**Business
Development
Effort**

Economic Development

Focus on Health Sector

1/3rd of new jobs in the county will be in the health field

- Doctors & nurses
- Rehabilitative services
- Assisted living facilities
- Medical device development & manufacturing
- Research
- Wellness & public health

Economic Development

Prepare for the Health Sector Growth

- Plan, zone & incentive health related industries near hospitals
- Diversity of workforce housing near hospitals
- Transit connecting hospitals to high density populations
- Direct workforce training efforts to health field
- Market the vacant hospital in New Port Richey to healthcare-related tenants

Economic Development

Focus Workforce Development

- More Investment in workforce development & leverage other funding sources
- Focus on health fields
- Consortium of public & private leaders to guide programming
- Focus on outcomes & track placement rates
- Employer connection & agility
- Matching grants to employers

Economic Development

Tourism



Economic Development

Previously Developed Spaces



Economic Development

Overview

- 75% focus on small business development
- 25% business recruitment effort in health field
- Prioritize workforce development
- Leverage natural assets for eco-tourism
- Encourage redevelopment

Development Strategy

WHAT, HOW & WHERE

Market Demand cornerstone of strategy:

- 3.2 million sf offices (19,000 jobs)
- 2.4 million sf retail – 100,000 pop increase/41,000 HH's
- Hotel
- Bottom line: opportunities for jobs, revenue and well planned transit friendly growth

NEXT STEPS

Establish Priority Development Areas along SR 54 /I- 75 Corridor & West Market Area

- Strong leadership to focus on PDA 's compared to other areas (75 years of inventory)
- If not implemented danger of scattered site, sprawl
- Rare opportunity most communities would envy. Set the bar high while cost are low.

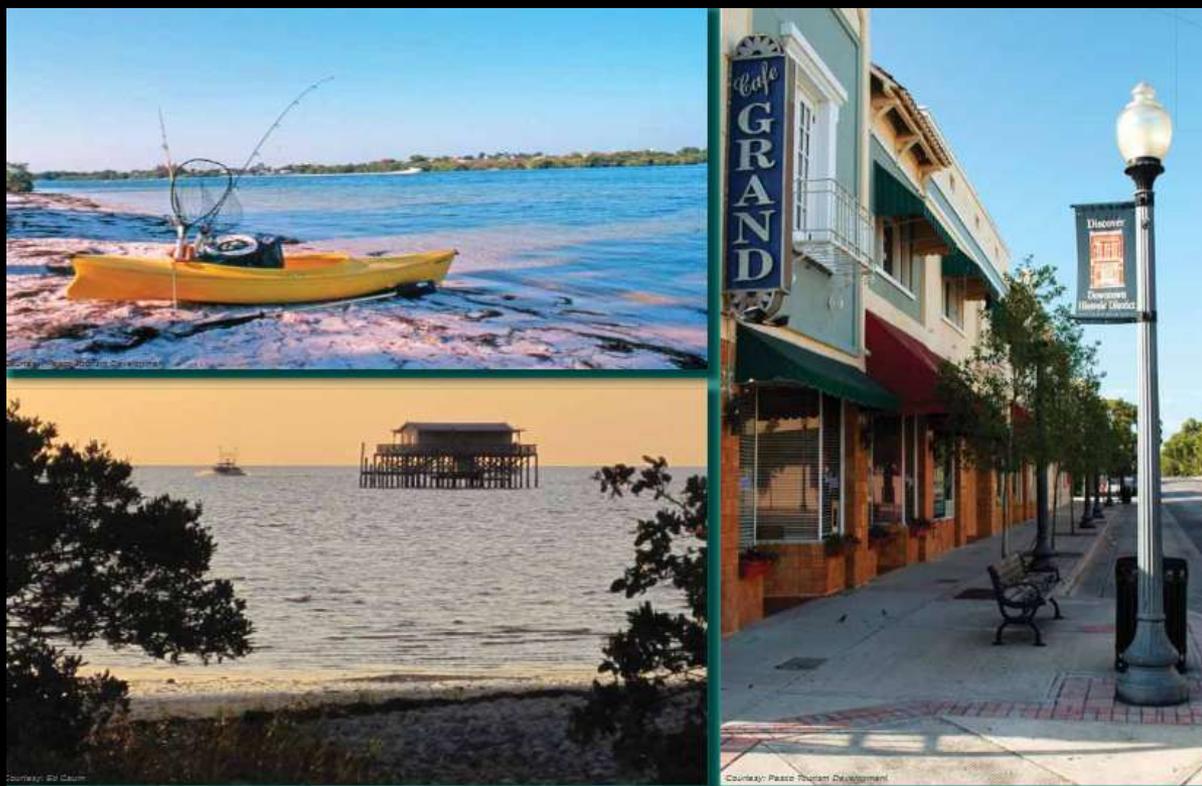
PDA's based on Community feedback

-54/I 75 Corridor : Community & market acceptance e.g. Forest City retail @ Wiregrass

NEXT STEPS

West Market Area (US19 Redevelopment)

Strong desire to eradicate blight.



NEXT STEPS

US 19 Revitalization requires Public Private Partnerships:

1.) Commit redevelopment \$ for land assemblage/property disposition program to convey to developers (may require staff training or consultant assistance)

2.) “Corridor Lifestyle” opportunity:

- Regular local bus or BRT service along the corridor
- Focuses diverse shopping and entertainment uses around transit stops
- Higher density residential one block off retail corridor
- Residents can walk to transit stop and go several stops for multiple destinations
- Residents can eliminate car trips and sometimes have no car
- Encourages walkable communities around transit with reduced carbon footprint
- Encourages other mixed use infill between stops as services increase

HEALTH CARE = ECONOMIC ENGINE

Market driven, well paid jobs

Multiple development opportunities: medical offices, aging-in-place; skilled nursing; stroke and surgery recovery facilities; age targeted community; memory care;

retail, hotel, apartments, eldercare, daycare

Community partnerships:

Education- High school academies, community college and St. Leo University

Economic Development staff priority

Planning Department “Fast Track”

Confirm Availability of broadband (“Dark Fiber”)

WHERE

2 Development Nodes – 54 Corridor; 19/Harbor Corridor
(minimize sprawl; capitalize on what's been created/infill;
existing infrastructure, streets, utilities, parks, schools)

SUMMARY

Priority Development Areas for SRS4/I75 area of West market area US/19

Redevelopment tax increment allocated to US/19 for property acquisition. Property acquired during low cost period.

Healthcare is an economic driver

Collaborate with cities

Institutional Alignment

1. Instead of a Change Agent driven process must move to Ownership of process (from top down and bottom up)
2. Align policies, practices, and strategies
3. Harmonize (not everyone has to be singing the same note but they have to be in harmony)
4. Manage for results and mutual accountability (achieve competence, obey the law, enable accountability and, generally, don't over rule)

Lean Governance

1. Delegate decisions down to the lowest competent level (subsidiarity)
2. Reduce impediments to desired redevelopment – create zones where red tape is removed to encourage redevelopment
3. Address the aspects of projects that impact the public realm with ordinances (e.g. connectivity, building form, assemblage) but allow diversity of style and approach
4. Replace being the regulator with being the resource where possible (educate and facilitate the opportunities for premiere development and redevelopment)

Communications

1. Create linkages between institutions and entities
2. Use the dashboard as a central communication tool for the whole county (not the diagnostics)
3. Use the different markets to focus and adjust your communications (develop a shared understanding of “why”)
4. Accept nothing less than real community involvement
5. Achieve appropriate tone
6. Transparency

Action Items

- Behavior changes
- Complete zoning code changes
- Complete design standards
- Complete the Ecological and Agricultural Conservation Regulations
- Drop consideration of TDR's
- Align the regional economic and land use plans and the county's
- Align the towns land use codes, plans and economic planning and the county's
- Increase reliability of permitting and inspection process through training and supervision
- Begin preparation of market plans
 - Pass ordinance to create sub-planning districts that function as planning commissions
 - Convene the market area planning commissions

Action Items

- Cross train staff to speed permitting in different parts of the county
- Create lean coding zone for reduction of red tape in redevelopment
- Create an online solution tool-box to generate and explore best practices
- Facilitate lines of communication with workshops, round tables and online webinars
- Complete dashboard
- Convene separate workshops on redevelopment, placemaking and sustainable agriculture
- Develop new platforms through social media, community centers, libraries and other means to involve citizens in the planning process
- Convene a communications workshop to deal with oral and written communication
- Put all stakeholders input, all draft ordinances, all problems online to assure transparency.

FUNDING THE PRIORITIES

Or

Invest to increase value!

Allocate a significant portion of the Redevelopment tax increment to land assembly along Route 19 for re-conveyance.

The 5 cent gas tax could be enacted to enable an additional \$3.5 million to go to parks, libraries and cultural facilities.

With a clear expenditure program, an increase in the room tax to 4% could fund eco-tourism facilities.

Complete the capital improvement plan identifying the unfunded quality of life priorities.

THE WORK PLAN to address impediments

Or,

**The difference between good ideas and
good ideas that work is WORK!**

Significant Work Plan Items

Given that approved growth far exceeds market demand, the County should channel development into Urban Service Areas and areas served by transit to increase value.

Create the Open Space and Ag Preservation Trust and use Penny for Pasco funding to acquire development rights to create ecological linkage from the Gulf to the Green Swamp and foster agricultural uses.

Work to create a Tampa Regional Metropolitan Planning Organization to plan and fund transportation.

Significant Work Plan Items

Focus economic development on the medical sector and work force development

Focus development efforts on Route 19 and 54.

Complete the process for plan approval that leads to construction to allow the market to create winners and losers.

Maintain consistency on implementing the vision and create market area planning commissions.

Change the allocation in redevelopment to fund land assembly, enact the 5 cent gas tax and raise the room tax with explicit and clear expenditure programs for parks, culture, libraries and eco-tourism.

LEADERSHIP PREMIER

PASCO's CORE VALUES

- Respect
- Integrity
- Innovation
- Service Excellence
- Quality

DELEGATE AND DECENTRALIZE: Build capacity throughout the organization and delegate authority.

BUILD TRUST: Act consistently with the vision.

SEEK COLLABORATION NOT COMPLIANCE: Engage in dialogue with the development community—listen!

Thank You!

The residents of Pasco County, and all the people engaged in its development.

Pasco County government

Pasco Economic Development Council

All the interviewees that participated in the project, and all people that made this process possible.

A special thanks and recognition to the efforts of:

Michelle Baker, County Administrator; John Hagen, Pasco EDC President; Ted Schrader, Chairman of the Board of County Commissioners; Trey Starkey, Chairman of the Pasco Economic Development Council; Kathryn Starkey County Commissioner District 3; Pasco County Deputy Sheriff Captain James Mallo; Richard Gehring, Planning and Development Administrator, and the Pasco Planning staff, Melanie A. Kendrick, Matthew J. Armstrong, Justyna Buszewski, Smita Ambadi, Rebecca Stonefield, Jennifer Carpenter, and Rich Dutter.



Questions?