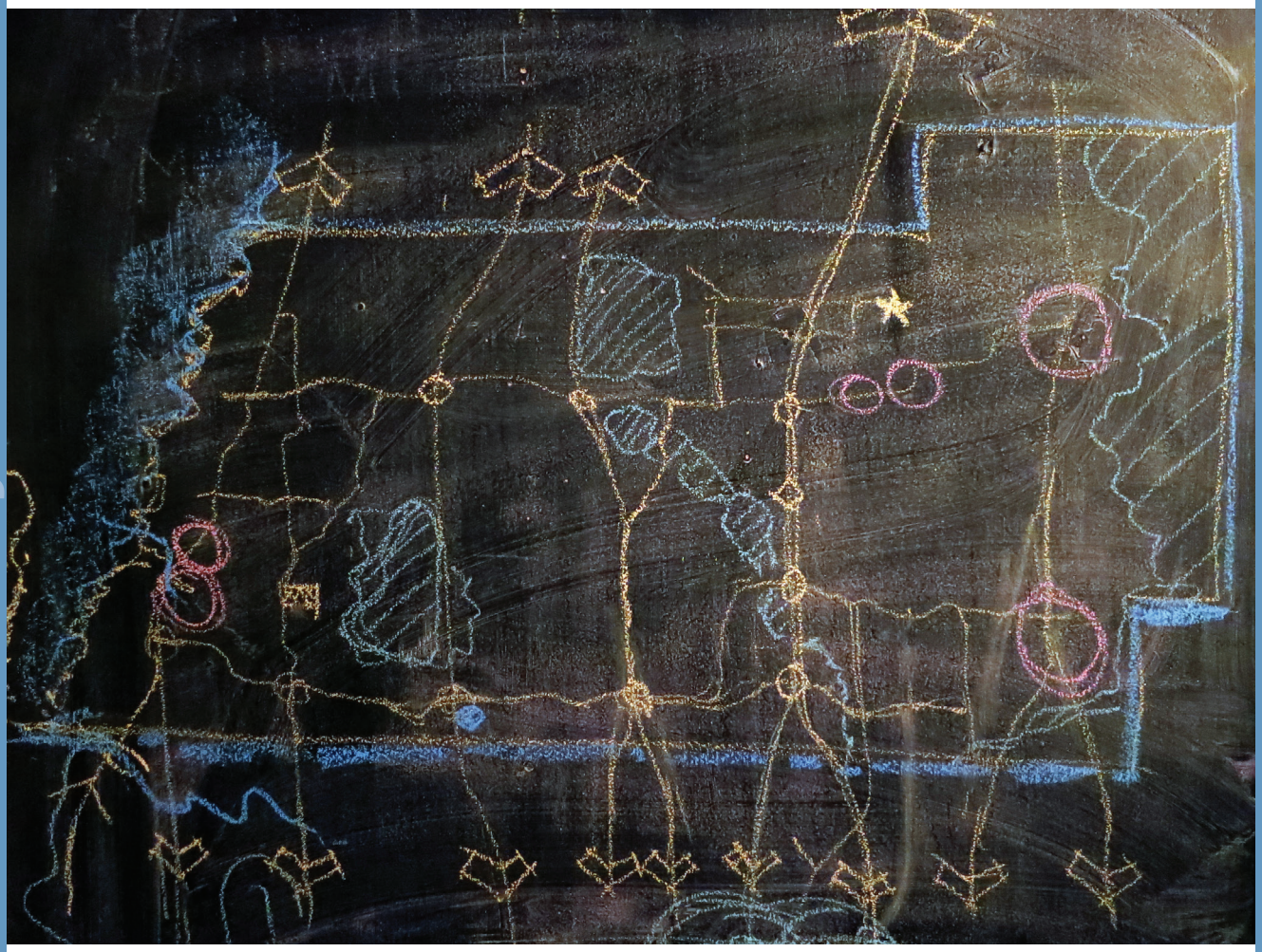
A ULI Advisory Services Panel Report

Pasco County Florida

October 6–11, 2013



Urban Land Institute

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Pasco County Florida

Envisioning Transformative Economic Development

October 6–11, 2013

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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 committed to

- Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
- Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving;
- Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
- Advancing land use policies and design practices that respect the uniqueness of both built and natural environments;
- Sharing knowledge through education, applied research, publishing, and electronic media; and
- Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

Established in 1936, the Institute today has more than 30,000 members worldwide, representing the entire spectrum of the land use and development disciplines. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

Cover photo: Pasco County chalk diagram by Richard E. Gehring, Pasco County planning and development administrator, sketched live for the panelists on their arrival to the county.

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1025 Thomas Jefferson Street, NW
Suite 500 West
Washington, DC 20007-5201

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About ULI Advisory Services

THE GOAL OF ULI'S ADVISORY SERVICES program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 400 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brownfield redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI's Advisory Services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and screened to ensure their objectivity. ULI's interdisciplinary panel teams provide a holistic look at development problems. A respected ULI member who has previous panel experience chairs each panel.

The agenda for a five-day panel assignment is intensive. It includes an in-depth briefing day composed of a tour of the site and meetings with sponsor representatives; a day of hour-long interviews of typically 50 to 75 key community representatives; and two days of formulating recommendations. Long nights of discussion precede the panel's conclusions. On the final day on site, the panel makes an oral presentation of its findings and conclusions to the sponsor. A written report is prepared and published.

Because the sponsoring entities are responsible for significant preparation before the panel's visit, including sending extensive briefing materials to each member and arranging for the panel to meet with key local community members and stakeholders in the project under consideration, participants in ULI's five-day panel assignments are able to make accurate assessments of a sponsor's issues and to provide recommendations in a compressed amount of time.

A major strength of the program is ULI's unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academics, representatives of financial institutions, and others. In fulfillment of the mission of the Urban Land Institute, this Advisory Services panel report is intended to provide objective advice that will promote the responsible use of land to enhance the environment.

ULI Program Staff

Gayle Berens
Senior Vice President, Education and Advisory Group

Thomas W. Eitler
Vice President, Advisory Services

Beth Silverman
Director, Education and Advisory Services Group

Caroline Dietrich
Logistics Manager, Education and Advisory Group

James A. Mulligan
Managing Editor

Laura Glassman, Publications Professionals LLC
Manuscript Editor

Betsy VanBuskirk
Creative Director

Deanna Pineda, Muse Advertising Design
Layout Artist

Craig Chapman
Senior Director, Publishing Operations

Acknowledgments

THE PANEL WISHES TO THANK the two primary sponsors of this Advisory Services panel—the Pasco County government and Pasco Economic Development Council (EDC)—for their tremendous support of this project. The informational and logistical support was excellent.

Appreciation also goes to the more than 120 interviewees—residents, developers, businesses, and nonprofit and governmental staff—who participated in the project, helping the panel understand the reality facing the county and craft informed recommendations. The enthusiasm and commitment of these interviewees was impressive and vital to the success of this effort.

The panel extends special thanks and recognition to the following individuals who were critical in supporting the panel's work: Michelle Baker, county administrator; John Hagen, president of the Pasco EDC; Ted Schrader, chairman of the Board of County Commissioners; Trey Starkey, chairman of the Pasco EDC; Kathryn Starkey, county commissioner District 3; Captain James Mallo, Pasco County deputy sheriff; Richard Gehring, county planning and development administrator; and Pasco Planning and Development staff members Melanie A. Kendrick, Matthew J. Armstrong, Justyna Buszewski, Smita Ambadi, Rebecca Stonefield, Jennifer Carpenter, and Rich Dutter.

Finally, the panel would like to acknowledge ULI Tampa Bay. This district council has convened or participated in more than four panels since the original Pasco County panel in 2008 and is demonstrating leadership in addressing regional and local development issues. We recommend that ULI Tampa Bay serve in the future to bring together the recommendations of these various panels to facilitate the formation of new regional initiatives that address transportation, workforce development, and other quality-of-life issues in the Tampa Bay region.

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ULI Panel and Project Staff

Panel Cochairs

John L. Knott
Founder and Chief Executive Officer
CityCraft Ventures
Charleston, South Carolina

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

Panel Members

Dan Conway
President, Director of Marketing and Economics
THK Associates Inc.
Aurora, Colorado

Diane Dale
Vice President, Director of Sustainability
AECOM
Alexandria, Virginia

Ron Gerber
Economic Development Manager
City of Walnut Creek
Walnut Creek, California

April Anderson Lamoureux
President
Anderson Strategic Advisors LLC
Boston, Massachusetts

William C. Lawrence
President
Cityscope Inc.
Providence, Rhode Island

Dan Slone
Partner
McGuireWoods LLP
Richmond, Virginia

ULI Project Staff

Daniel Lobo
Manager, Awards

Caroline Dietrich
Logistics Manager, Education and Advisory Group

Foreword: The Panel's Assignment

PASCO COUNTY, FLORIDA, with a population of 490,000 (the 2012 full-time resident population estimate is 470,391 plus an estimated 35,000 seasonal residents), is part of the four-county Tampa–St. Petersburg–Clearwater Metropolitan Statistical Area, a region with a population of 2.9 million. Over the past 20 years, Pasco County has been the fastest-growing county in the Tampa Bay region; its share of regional population has increased from 13.6 percent in 1990 to 16.7 percent in 2010, and its population has grown by 120,000 in the past decade alone. Most of this growth has occurred in unincorporated areas, which house nearly 92 percent of the county's population, about 215,000 of whom are concentrated in the older, denser areas between U.S. Highway 19 and Little Road, along the county's western boundary.

According to the U.S. Census Bureau, in 2011, of the approximately 200,000 residents in the workforce, about 174,000 commute for work, with approximately 79,000—or about 45 to 50 percent of the workforce—commuting out of the county. It is estimated that nearly 22 percent travel daily for 45 minutes or more one way. It is also estimated that about 30,000 people may commute daily to Pasco from other counties. Changing the county's historic role as the region's "bedroom community" is a primary motivator among Pasco's leaders to create more vibrant employment centers, attract jobs, and contribute to a multidimensional quality of life, thereby making Pasco a "premier" county.

Historical growth rates peaked in Pasco from 2000 to 2006 with unprecedented high levels of growth, primarily in the residential sector. Almost all of the ten-year growth that Pasco experienced through 2010 occurred during this six-year period. With the 2008 Great Recession, however, growth stagnated, unemployment climbed above state averages, and the property tax base eroded by nearly $10.4 billion, or 35 percent.

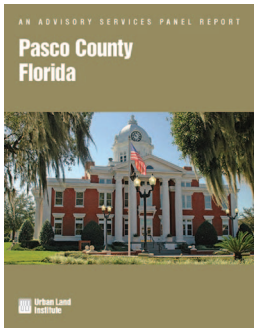
PASCO COUNTY

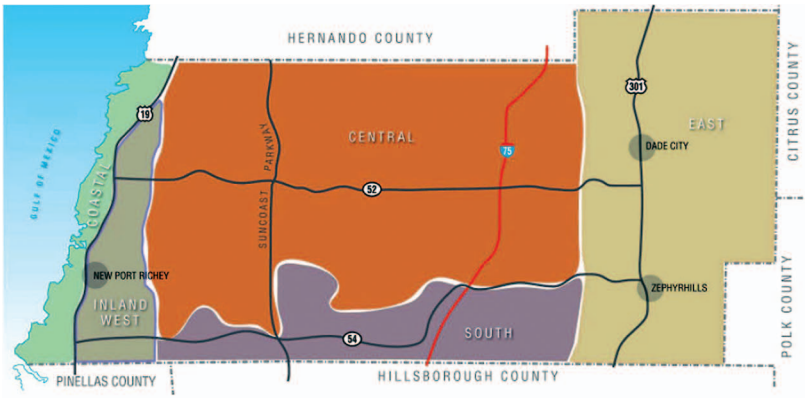
Regional map.

In 2008, as the outlines of a fundamentally different economy were just beginning to emerge, Pasco County and the Pasco Economic Development Council (EDC) took a courageous and critical step toward change. They jointly funded an Urban Land Institute Advisory Services panel to comprehensively address the changes in land use patterns and organizational performance necessary to respond to the new market realities. The panel's scope addressed how the county could increase employment and provide a balanced, long-term mix of uses, a healthier tax base, and a more efficient transportation system.

The 2008 panel highlighted two broad goals: economic development and smart land use, with the admonition that success in achieving these goals required implementation

The report from the 2008 Pasco panel became an often-cited and useful reference in the county.





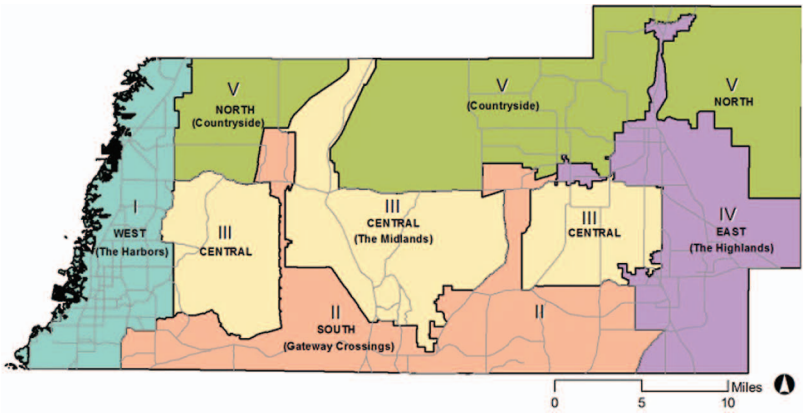
Market areas recommended by the 2008 ULI Advisory Services panel.

of a new county organizational approach that streamlined development review and aligned disparate functional areas within the county organization to focus on the common goals. As part of this streamlined development review, the panel called for a new, consolidated, and well-organized Land Development Code needed to provide a more understandable and accessible regulatory framework for new development and redevelopment activity. The panel also recommended that the county respond to the different land use needs of five distinct market areas by recognizing the vastly different land development patterns and opportunities within each area and providing resources commensurate with the needs of each area. Finally, the panel recommended broadening the county's land use decision-making process to include long-term strategic planning and an integrated capital improvement plan to create a more robust context for implementation and decision making.

Since the 2008 panel issued its recommendations, the county has been working vigorously on implementation. Dramatic progress and change have been marked by the following major milestones:

- As part of implementing the recommendations from the 2008 panel, the Board of County Commissioners adopted its first strategic plan in 2009. This plan set a course for the county that served as the cornerstone for the delivery of services to Pasco's citizens, forming a foundation for the development of a business plan and the county's annual budget, and guided the changes in the organizational structure and policy formation over the next four years.
- Planning and growth management functions have been reorganized into one department called Planning and Development with five divisions—Code Compliance, Current Planning, Long-Range Planning, Metropolitan Planning Organization (MPO), and Zoning and Intake—thus putting the development review processes under the purview of one organizational entity. The county has also streamlined the development review and building permitting processes to make permitting more predictable and timely and uses a workflow management system to streamline building permit processing.
- Work continues on revising, simplifying, and streamlining the Land Development Code. Major steps were taken in 2012 and 2013, including the reduction or elimination of variances and exceptions in approving land use amendments, zoning approvals, and building permits.
- In 2010 the Board of County Commissioners adopted the Pasco County Job Creation Incentive Ordinance to promote the attraction and expansion of target industries or businesses within Pasco County. This ordinance can be used for businesses either relocating or expanding to Pasco County or for businesses already residing in Pasco County that need to expand. The county also adopted Comprehensive Plan amendments for the five market areas with policies tailored to the needs of each area. Efforts continue to make the Comprehensive Plan the primary blueprint for the county's long-term vision.
- In 2011 the county designated the Urban Service Area to streamline development and redevelopment approvals in older developed areas and adopted Transit-Oriented Development Overlay Districts, which related to the planning and regional coordination along the State Road 54/56 corridor.

Market areas adopted into the Comprehensive Plan in 2010.



- In 2011 the county, in response to both changes in state law and recommendations of the 2008 ULI panel, eliminated concurrency fees (transportation impact fees) and replaced them with mobility fees. The county authorized using a form of tax increment financing to reduce fees to as low as zero to encourage targeted development in the Urban Service Area.

- In 2011 the county adopted its first complete capital improvement program budget. Work on this document continues to identify unfunded priorities that currently are not shown in the capital improvement program.

- In 2012 voters approved renewal of the Penny for Pasco sales tax, a local government infrastructure surtax, with an estimated 45 percent, a total of $245 million, allocated to the county. Pasco County's 45 percent share is distributed as follows:

  - Forty percent for transportation and open-space improvements and to address traffic congestion;

  - Twenty percent for economic development and job creation (an estimated $45 million is earmarked specifically for implementation of the Economic Development Plan);

  - Twenty percent for the acquisition of environmental lands; and

  - Twenty percent for improving public safety.

- In May 2013, the Board of County Commissioners adopted its second update to the Strategic Plan, articulating its overarching goal of making Pasco County "Florida's premier county." The plan is based on implementing measures to achieve the following four major strategic objectives:

  - Creating a thriving community;

  - Enhancing quality of life;

  - Stimulating the economy; and

  - Improving organizational performance.

- In May 2013, the Pasco County Board of County Commissioners adopted its first Economic Development Plan, which is closely aligned with its Strategic Plan, and is currently hiring a public information officer to support it. The Economic Development Plan articulates numerous strategies and measures to achieve five goal areas as follows:

  - *Tell the Pasco story*—tell the story of the county's aspirations and achievements in a bold and creative way through marketing that draws positive regional, national, and international acclaim.

  - *Encourage continued positive growth*—work to become one of the most competitive business environments in the southeast United States.

  - *Grow businesses*—pursue new partnerships and alliances to create a robust, connected entrepreneurial culture.

  - *Grow Pasco's workforce*—educate, train, and attract a top-notch workforce to support the county's employment base and propel targeted economic sectors.

  - *Enhance Pasco's quality of life*—create and maintain state-of-the-art community services and facilities, including education, recreation, cultural and tourism-related amenities, while enhancing Pasco's environmental resources.

  In addition to overarching countywide strategies, the Economic Development Plan has separate strategies with the same goals for each of the five adopted market areas.

- In 2013 the county adopted the Harbors-West Market Area Redevelopment/Infill Plan, which designated specific strategies for submarkets in the Harbors West Area. This market area plan addresses the massive redevelopment challenges for the densest and oldest area of the county where 40 percent of county residents live. This report also highlights the need to open the water access points to more resident and tourist opportunities.

A corresponding Post-Disaster Redevelopment Plan is anticipated to be adopted in early 2014.

These measures illustrate the dramatic breadth and enthusiastic nature of change since 2008—changes that are responsive to new market conditions and quality-of-life demands of Pasco's residents and businesses. Given the scope of these changes, the county and the EDC requested ULI to form a 2013 panel to evaluate progress to date and to make recommendations for the next phase of the county's transformation.

The 2013 panel was asked to address two primary categories of questions inherent in the transformation:

1. Evaluation of progress to date over the past five years (20 percent of panel's efforts):
    a. Review actions and results addressing the recommendations of the original panel report.
    b. Recommendations and conclusions should be in the prescriptive style of panel reports, recognizing strengths and prescribing areas of improvement and best practices needed.
2. Areas or topics for setting a direction for the next five years 2014–2018 (80 percent of panel's efforts) focused on the following topics:
    a. Balancing economic growth and competitiveness—Pasco's regional economic role;
    b. Place making—improving Pasco's quality of life;
    c. Creating thriving communities—Pasco's residential growth dynamics;
    d. Organizational performance—workforce development and talent attraction;
    e. Investment tools—public/private partnerships;
    f. Movement and connectivity—multimodal transportation systems;
    g. Balancing nature, agriculture, and tourism;
    h. Creating a sustainable local economy in revenue and capital investment;
    i. Governance—models and structures for leadership and management focus; and
    j. Preserving and sustaining Pasco's cultural, environmental, and social quality of life during the next 20 years of inevitable growth.

Pasco panelists get ready for the county briefing.

Within the broad categories, the panel was presented with the following specific questions to address:

Comprehensive Plan

1. How can a sustainable vision be better incorporated and facilitated across all departments and divisions within the county to enhance intra-agency collaboration?

Land Development Code

1. How should the Pasco County Land Development Code best be structured to enable the county to address desirable market-based housing and commercial development over the next decade?
2. What are the industry benchmarks and standards in time, quality plane, and costs for the review and approval of site development and building construction plans?

Development within the West Harbors Market Area

1. How should the implementation strategies presented within the Harbors Redevelopment Plan be prioritized?
2. How should investment within the West Market Area subdistricts be prioritized?

3. What benchmark communities have created successful incentive mechanisms to encourage private rehabilitation investment?

4. Should smaller parcels be aggregated to create more opportunity for planned development while achieving customer buy-in?

Development of the State Road 54/56 corridor

1. What model(s) should the county benchmark to support urbanization of the South (Gateway Crossings) Market Area for

    a. Evolving from a suburban bedroom community to incorporate verticality, density and urban form; and

    b. Best practices for a county to operate area in a municipal manner as it relates to governance and financing mechanisms?

2. How can the county raise awareness and educate the development community to achieve more buy-in about the benefits of urban design to a market that has traditionally developed suburban prototypes?

Urban Service Area

1. How does Pasco balance and/or prioritize the new and high-growth demand of the State Road 54/56 greenfield corridor with the redevelopment of the U.S. Highway 19 corridor in the Harbors in a supportive manner?

2. As development opportunities begin recovering from the Great Recession, how does Pasco preserve high-access nodes for targeted industry development opportunities for high employment-generating uses?

Strategic Plan

1. What alternative organizational structures or processes are available for consideration by Pasco County to create state-of-the-art and innovative approaches to meet the county's commitment to responsible, fair and efficient governance?

2. What metrics should Pasco be monitoring as part of the continual process improvements to determine if it is on the right path with the adopted Board of County Commissioners' Strategic Plan?

Revenue

1. Should the county be considering alternative revenue-generating methods to more equitably assign costs for urban vs. rural areas? If so, what alternative methods or mechanisms have been successfully used by other jurisdictions to deal with this issue?

Governance

1. How should the county prioritize the strategies presented in the Economic Development Plan in moving forward and as it postures the implementation of the Penny for Pasco revenues?

2. How should the county encourage proximity of mixed-income housing and jobs to reduce commuter impact on the road infrastructure in the region without expending valuable office and industrial lands in potential superemployment zones?

3. What standards of assistance, education, and advocacy should Pasco County and the Pasco EDC encourage its community partners to provide to be considered "best in class" to prospects and incoming and expanding companies?

4. What cultural amenities are required for a community growing from 500,000 to 1 million in population to implement the vision of "A Premier County" and to create a thriving community?

Initially, the panel felt that the overwhelmingly broad scope and level of detail of these questions would compromise its ability to formulate high-quality, feasible recommendations. Several panel members with extensive experience on other Advisory Services panel assignments noted this was probably the largest scope they had ever seen, and ideally four or five panels would be required to address all the issues.

However, as the panel conducted its research and deliberations, it discovered major themes and framework issues around which to formulate its recommendations. So, although the panel did not address every detailed question, it hopes that its recommendations offer a relevant framework within which the county can effectively continue to transform its development and redevelopment patterns to respond both to its vision and to the new market realities.

Context of the Panel's Findings and Recommendations

Pasco has set for itself a vision of becoming Florida's premier county, which is both timely and compelling as a response to fundamental changes in the market and the aspirations of people choosing a place to live. Many communities need to make the change that Pasco has initiated, and few will have the courage to do so. The panel decided to focus on this primary strategic objective as the organizing framework for its recommendations.

During the interviews, the panel asked the interviewees for their definition of premier and for their thoughts on impediments to achieving that goal. *Premier* meant different things to different people, but the first sidebar captures some of the dimensions articulated by interviewees.

The panel also heard from many interviewees about things that need to be preserved in Pasco, dimensions of the natural and social environment that make Pasco a unique place. The things the panel heard that need to be preserved are set out in the second sidebar.

Although the panel received input from the interviewees on the aspirations and the needs for preservation, most of the comments the panel received were about "why you can't get there from here": that is, the challenges. Here are some selected quotes that resonated with the panel:

- "There is no way to attract business to West Pasco—U.S. Highway 19 is a disaster—West Pasco is dying."
- "Our businesses cannot find a qualified workforce. We need a workforce! We need better workforce training!"

What the community told us would make Pasco "premier"

- Access to the Gulf
- Active agricultural sector
- Alternatives to the automobile
- Collaborative, working together for sensible solutions
- Community involvement and ownership
- Culture and recreation
- Easy to do business
- Fair and equitable, safe and secure
- Family-friendly
- Great libraries, parks, and schools
- Health for our people and natural assets
- High-quality, high-paying jobs
- Friendly to diversity
- Live, work, play
- Low crime
- Preserves its historical roots
- Recreation areas
- Respect each other and our natural and cultural assets
- A sense of community
- Sound tax base
- Strong cities and downtowns
- Thriving arts community
- Trained workforce
- Transit
- Walkable and bikeable
- Where businesses want to invest

- "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' does not grasp the real Pasco. We do it because we have to, not because it is authentic. Premier?? That is an in-house term, 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."

Each of these observations informed the panel's work as it evaluated how the county has progressed from 2008 in implementing its vision. As the panel considered the extensive information it received and the assignment it was given, it concluded that the most useful approach it could take to address the county's questions would be to focus on the challenges that need to be overcome to achieve Pasco's aspirations.

The panel concluded the county faces seven interrelated major challenges to achieving its vision. Each of these is described in more detail in a section of this report, and the panel provides recommendations for how to overcome each challenge. Following is a summary of the seven challenges that the panel identified.

Absorption and Projections

The panel examined the market forces that will determine the rate and extent of future growth and concluded that "approved" growth could potentially exceed significantly what the market has the capacity to absorb. Specifically, the county has approximately 300,000 residential dwelling units that have been designated as potential entitlements, whereas current market conditions project absorption of approximately 4,100 units per year. Under those assumptions, the panel estimates that currently approved growth will take 75 years to absorb. In other words, the market rate of absorption—and thus the projection of population—is much lower than the county's current projections. Moreover, the 300,000 approved units do not include unentitled opportunities for revitalization and redevelopment of the U.S. Highway 19 area, which may take a share of market absorption to the extent the county is successful in its redevelopment efforts. The panel concluded that these market-based projections should result in a fundamental rethinking by the county of where growth should be channeled to occur as well as the scope of infrastructure investment needed to serve it.

What needs preservation if Pasco is to be "premier"

- Green Swamp
- Starkey Park
- A lot of natural beauty
- Rolling hills
- Urban areas in rural county
- The highlands
- Historic cities and towns
- Agricultural vistas
- Diversity of Pasco's people and land
- Coastline fishing
- Southwest mangroves on coasts
- Diversity of five market areas

Sustainable Site Strategies

Pasco already has a rich palette of natural and cultural assets that are at the heart of its identity. The county has assembled more than 30,000 acres in conservation lands that provide vital ecological and hydrological functions, wildlife habitat, and essential ecological corridors. The county has also drafted a transfer of development rights (TDR) program as an additional means to preserve open space. Although the county has made significant progress in open-space preservation, including the generation of

a proactive Environmental Lands Division action plan, it would benefit from expanding these strategies. Preservation of natural areas along the coast is critical to ensure resiliency against the increasing intensity of storms, greater inundation, and sea-level rise. Better, more effective means of preserving agricultural land are needed. More open-space preservation will be needed to balance future growth.

The panel suggests that the TDR program introduced into Pasco County's Comprehensive Plan in 2010 by the county will not be an effective means of preserving open space. First, with the tremendous oversupply of "approved" development, the value of transferring development rights is probably very low or nonexistent. Second, the county is attempting to increase the density of development that actually occurs. Why should the county create the disincentive of making developers who wish to increase density purchase the additional development rights from other areas of the county? The panel suggests abandoning the TDR program and focusing on more effective open-space preservation methods described in the section on sustainable strategies.

In addition, the panel suggests that the county could much more effectively manage its natural resources if it took a more integrated approach to natural systems management. The section on site systems describes examples involving water system management and park design. This integrated approach not only provides cobenefits, but the cross-agency approach also provides the opportunity to share revenues for more efficient and effect use of financial resources.

The existing program, the Environmental Lands Acquisition and Management Program, was created in July 2004 when Pasco County adopted Referendum No. 04-233. The program is responsible for purchasing environmentally sensitive lands throughout the county by either fee title or less-than-fee methods. Funding is provided through a portion of the Penny for Pasco surtax. Partnerships with state and federal agencies are sought to supplement the Penny funds. Since 2005, approximately 2,100 acres have been acquired with the following objectives:

- Protecting natural communities including uplands and wetlands;
- Connecting natural linkages;
- Conserving viable populations of native plants and animals;
- Protecting habitat for listed species;
- Protecting water resources and wetland systems;
- Protecting unique natural resources;
- Enhancing resource-based recreational opportunities; and
- Expanding environmental education opportunities.

Transportation Planning and Funding

The county's transportation planning process is centered in a county-based Metropolitan Planning Organization, which is the primary channel through which federal and state transportation funding flows. Every region of the country has an MPO, but the county-by-county MPO configuration in the Tampa Bay region (and, for that matter, throughout Florida) may offer additional challenges that could limit resource generation and regional configuration of transportation solutions.

A case in point is the proposed privately financed elevated tollway to be constructed within the median of State Roads 54/56. This facility would handle the growing east–west traffic flow, a large component of which is traffic from Hillsborough County. Interestingly, the panel was informed that the east–west road in north Hillsborough was rejected because of environmental concerns. Building an elevated freeway in Pasco over State Roads 54/56 could create significant barriers to high-quality development in that corridor. Why should Pasco assume the burden of solving a regional transportation problem without exploring other options and accessing regional funding resources? The elevated freeway is just one example of why the panel be-

lieves that Pasco and the three other Tampa Bay counties need to explore creating a regional MPO that could explore a range of solutions, including revisiting transit options and accessing a broader array of funding sources.

The county has done an amazing job of enhancing intracounty bus transportation, using funding from the tax increment and other funds for bus transit on U.S. Highway 19 and State Road 54, but regional transit suffered a major setback with cancellation of the rail transit project for the region.

Pasco already participates in regional discussions to explore ways to address the region's rail-transit and bus-rapid-transit needs. For instance, significant coordination takes place with the Tampa Bay Regional Transportation Authority as well as the regional MPOs, the Regional Planning Council, Tampa Bay Partnership, ULI One Bay, the Florida Department of Transportation, and area chambers of commerce. The panel suggests that Pasco continue to participate in regional discussions to expand exploring ways to address the region's needs for rail or bus rapid transit.

Economic Development

The panel concluded that the county could benefit from broadening its economic development effort to address several underresourced and untapped opportunities. Specifically, the panel found considerable dissatisfaction with workforce training and development programs. It also believes the county is overlooking the tremendous economic development opportunities in the health care and ecotourism sectors. And although the county has taken a major step toward redeveloping the U.S. Highway 19 corridor with adoption of the Harbors-West Harbor Market Area Redevelopment Plan, the panel suggests additional measures are needed to enhance the effectiveness of redevelopment. Finally, the panel applauds the county's focus on existing businesses and recommends enhancing that focus.

Development-Shaping Strategies

The tremendous oversupply of approved development creates two major challenges for Pasco:

- First, with so much approved new development, will enough market demand remain to attract investment in the revitalization and conversion of the obsolete development patterns along the U.S. Highway 19 corridor? The county's redevelopment efforts here have lowered infrastructure fees and streamlined entitlement, but additional effort is needed to aid conversion of these obsolete development patterns. Specifically, the county needs to allocate resources and focus on assembling sites for reconveyance and redevelopment. Redevelopment on these assembled sites will require the county to engage in public/private partnerships and should include mixed-use villages that incorporate a substantial residential component with walkability and transit connections to recreation and commercial amenities. This redevelopment segment of development is not listed on the county's approved development rolls and will absorb a portion of the market that would otherwise be absorbed by greenfield development.

- Second, the county needs to use its open-space preservation and infrastructure investment policies to channel new development primarily into the 54/56 Gateway Crossings market area so that growth is concentrated and not dispersed. Dispersed growth patterns will be expensive to serve and will perpetuate the suburban growth pattern that is becoming obsolete.

Leadership

The panel was impressed with the tremendous efforts the county has made in articulating a new vision to change development patterns and streamline entitlement processes for development that responds to its vision. Recognition of the different needs of each of the five market areas in the Comprehensive Plan is a giant step forward. Measures such as the mobility fee and the Urban Service Area create alignment between goals and incentives.

The leadership challenge will continue; in fact, it is the single most critical task for the county to fulfill to be successful in achieving its vision. In the section of this report on leadership, the panel identifies the need for vigilance and greater consistency between the county's stated goals and its actions. The panel also identifies the need to change the tone of dialogue with the development community from confrontation to consultation. It recommends creating citizen forums within each market area to participate in the formulation of development policy and suggests forming stronger partnerships with the cities on areas of common interest.

Funding

The panel was struck by how much Pasco has done to overcome its revenue deficiencies compared with other Florida counties. With revenue less than half of what adjacent counties have, Pasco has still managed to set aside a portion of the Penny for Pasco funds for economic development and open-space acquisition. However, the panel concluded that if Pasco is serious about its vision, it must connect more resources to achieving it and do a better job of identifying shortfalls. The panel identified five areas where additional resources and work are needed:

- Currently, the county has not allocated any resources from the West Harbor Redevelopment Area for site assembly. The tax increment is currently divided between subsidies to the mobility fee program and bus transit operation costs in the corridor. Without funding site assembly and subsequent reconveyance, redevelopment along U.S. Highway 19 will not occur.
- The county has $20 million in capital funds to build parks but has halted construction of new parks because annual revenues are insufficient for maintaining them.
- Funding for arts, cultural facilities, and libraries is significantly deficient. These dimensions are components of a "premier" county and require resources to be viable.
- Resources available to stimulate ecotourism, a major economic development opportunity, are scarce. A clear and responsible investment program for ecotourism could provide the framework for funding from an increase in the room tax from its current 2 percent to 4 percent.
- Although the county has developed a capital improvement plan as part of its annual budget, the program fails to identify unfunded needs. The county should expand the capital improvement plan to identify the elements that could contribute to fulfilling its vision but are unfunded. Without this information, the county has no way of working with outside agencies and funding.

Summary of Analysis and Recommendations

The panel's recommendations flow directly from its analysis of the seven challenges summarized above and described in more detail in the sections that follow. A summary of the recommendations follows.

- **Open space and agricultural land preservation:** The panel believes that Pasco has hugely valuable natural assets and that it needs to enhance their preservation. In the brief time available for addressing this massive subject, the panel formulated the following four recommendations:
  - Form an Open Space and Agricultural Preservation Trust to serve as the primary actor for acquiring and preserving open space by acquiring development rights and fostering agricultural vitality. Use the trust to leverage resources from the Penny for Pasco tax.
  - Abandon the TDR system because it creates disincentives to the type of development the county is seeking and the market for development rights transfer is oversupplied.
  - Expand ecological planning to create a continuous corridor from the Gulf to Green Swamp.
  - Pursue cross-departmental collaboration that promotes integrated infrastructure solutions with broad benefits.

- **Transportation planning and funding:** The panel's recommendations on transportation suggest greater regional engagement on funding and configuration of transportation and transit solutions. Specifically, the panel recommends the following:
  - Work to create a Tampa Bay regional MPO to plan and fund transportation. This may require amendments to state law.
  - Defer for a reasonable time the proposed privately financed elevated tollway on the State Road 54/56 alignment. Instead, the county should pursue a regional collaboration that could both enhance funding opportunities and configure different physical solutions. Proceeding with the elevated freeway before pursuing the regional MPO configuration would foreclose possible superior solutions to the east–west congestion challenge. In the meantime, the continued buildup of congestion may spawn more public support for transit solutions.
  - Explore regional transit solutions, which could take the form of rail or bus rapid transit or both.
  - Explore numerous opportunities for filling gaps in connectivity, some of which may be in adjacent counties such as Hillsborough County, as well as parcel-to-parcel connections that would reduce the congestion caused by these gaps.

The panel suggests that the ULI Tampa District Council could serve as a convener for the regional discussion of transportation funding. Numerous panels have been held in the Tampa Bay region over the past several years, and a forum involving key community leaders and the chairs of these advisory panels may be a good start to the discussion leading to regional cooperation on regional transportation planning and funding.

- **Economic development:** The panel's recommendations within this challenge area address the need to concentrate on areas of opportunity and bypass areas of low return. Here are specific suggestions:
  - Direct 75 percent of business development efforts to existing businesses.
  - Direct 25 percent of business development efforts to the health sector.
  - Work to reduce and consolidate the so-called employment zones so they are concentrated, not scattered.
  - Prepare to accommodate growth of the health sector through assistance in mixed-use site planning that adds residential and commercial to health care centers.
  - Focus on improving the existing workforce development and training system.
  - Leverage Pasco's unique natural resources for economic development gain through greater focus on ecotourism.
  - Focus on redevelopment along the U.S. Highway 19 corridor.
- **Shaping development:**
  - Focus redevelopment efforts on U.S. Highway 19 by engaging in site assemblage to create mixed-use villages. This focus relies on the recommendation for funding this activity from a reallocation of the tax increment.
  - Channel growth to the State Road 54/56 corridor to enhance opportunities for connectivity, transit, and place making.
  - Complete the process for plan approval that leads to construction to generate a transparent and competitive business cycle.
- **Leadership:** The panel has four specific suggestions to enhance the county's effectiveness in leadership.
  - Delegate and decentralize: Continue to build capacity throughout the organization by delegating authority and acting consistently with the stated values.

- Seek collaboration, not compliance: Engage in dialogue with the development community—listen!
- Create community ownership: Create citizen market area planning councils that can help formulate and implement development policies.
- Collaborate with the cities: Create a more collaborative relationship with the six cities around areas of common interest, including land use, historical and cultural preservation, open space, and agriculture.

Exercising effective leadership is the most important task the county faces in achieving its vision. It requires actions consistent with the vision and open and transparent decision making.

- **Fund the vision**
  - Allocate a significant portion of the redevelopment tax increment to land assembly along U.S. Highway 19 for reconveyance to developers for mixed-use, connected development.
  - Enact the five-cent gas tax to enable an additional $3.5 million to go to parks, libraries, and cultural facilities. This $3.5 million is currently an allocation from Penny for Pasco used to fund transportation.
  - With a clear expenditure program, increase the room tax to 4 percent to fund ecotourism programs and facilities.
  - Complete the capital improvement plan identifying the unfunded quality-of-life priorities, including parks, culture, community activities, and libraries.

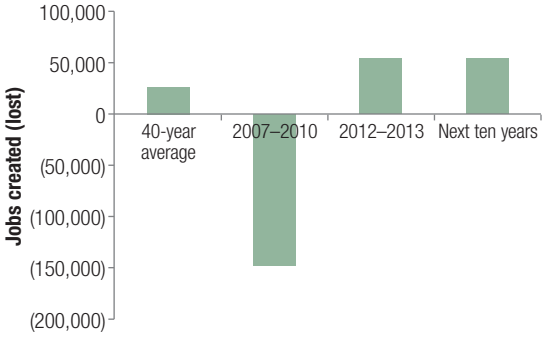
The remainder of this report documents the panel's analysis and recommendations.

Market Potential

UNDERSTANDING SOCIOECONOMIC FORCES at work in a community helps the leadership plan for the future. Pasco County is part of the four-county Tampa metropolitan area. The Tampa metro area is characterized as a region of almost 2.9 million people living in 1.2 million households, of which 1.6 million individuals are employed. Pasco County has 490,000 people in almost 200,000 households; 186, 000 people are employed in Pasco County, and 84,000 employees have to commute to Tampa each day as their place of employment. Since 1970 the Tampa metropolitan statistical area has grown by almost 26,000 new jobs per year, but in the 2007–2010 recession, Tampa lost 148,000 jobs. In 2012–2013, the recovery began, and 54,000 jobs per year have been created. During the next decade, Tampa is estimated to average 25,600 jobs per year, fueling annual population growth of 53,000 people in 21,000 households (see figure).

Pasco County's growth is projected at 3,600 new jobs per year with one-third in health care and one-third in government and finance. Pasco County's population is projected to grow by 11,000 people per year in 4,100 households, and by 2024 almost 610,000 people will live in Pasco County (see figure summarizing these projections).

Job Creation, Tampa Bay Region



Population and Employment Projections, Tampa and Pasco County

	Greater Tampa		Pasco County	
	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

What will these macro trends mean to the residential and commercial markets in greater Tampa, but more important, in Pasco County? Historically, Tampa has built 13,000 single-family and 6,500 multifamily units a year, and Pasco County has built an average of 3,000 single-family units, which is almost 23 percent of the metro total, and 700 multifamily units, or 11 percent of the metro total. In the last five years, metro Tampa has been performing at 44 percent of its historical norm whereas Pasco County residential construction has fallen to 50 percent of its historical norm, averaging just 1,800 units per year compared with almost 10,000 units in 2005. Not only has the pace of construction fallen dramatically, but home values have also declined because of the recession. At the peak of the market in the greater Tampa area in July 2006, the average home sale was priced at $547,600, and by December of 2011 the average home sold had declined by almost half of this value to $287,700. Today, home values have recovered to $347,700 in greater Tampa but are still just 63 percent of the peak. During the next decade, Pasco County is estimated to average the construction of 2,000 detached single-family units, 800 townhouses and condominiums, and 1,300 rental apartment units annually, for a total of 4,100 residential units.

Regarding Pasco County commercial markets, greater Tampa has 180 million square feet of industrial space, 34

Residential Units, Tampa and Pasco County

	Tampa metro		Pasco County	
Type of project	**Historical**	**Projected**	**Historical**	**Projected**
Single family, townhouse, and condominium	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

million square feet of office space, and 67 million square feet of retail space along with 29,500 lodging rooms. On a per capita basis, greater Tampa has a much lower inventory of commercial space than national averages, and Pasco County's inventory is even lower except for retail space. Pasco County has 5.4 million square feet of industrial space, or 11 square feet per capita, compared with Tampa at 63 and national markets at 83 square feet per capita, respectively. Pasco County has 4.7 million square feet of office, or 9.6 square feet per capita, compared with Tampa metro at 12 and national markets at 25 square feet per capita, respectively. Regarding retail, Pasco County has 13 million square feet of retail, or 26 square feet per capita, compared with Tampa metro at 23 and national markets at 31 square feet per capita, respectively. Pasco County also has inventory of 2,700 lodging rooms. According to projections, during the next decade Tampa metro will average annually a demand for 2.4 million square feet of industrial space, 2.3 million square feet of office space, 1.0 million square feet of retail space, and 650 new hotel rooms. During the next decade, Pasco County is projected to grow annually by 390,000 square feet of industrial space, 315,000 square feet of office space, 240,000 square feet of retail space, and 70 hotel rooms, which is one limited service hotel per year.

Commercial Development Projections, Tampa and Pasco County

	Tampa metro		Pasco County	
	Inventory	**Average annual demand**	**Inventory**	**Average annual demand**
Industrial (sq. ft.)	180 million	2.4 million	5.4 million	390,000
Office (sq. ft.)	34 million	2.3 million	4.7 million	315,000
Retail (sq. ft.)	67 million	1.0 million	13.0 million	240,000
Hotel (rooms)	29,500	650	2,700	70

As a result of this demand, Pasco County should anticipate annually the urbanization of 570 acres for single-family units, 100 acres for townhomes and condominiums, 90 acres for rental apartment units, 25 acres for retail space, two acres for hotels, and 280 acres for major roads and open space for total absorption of 1,122 acres: 68 percent for residential land uses, 7 percent for commercial uses, and 25 percent for roads and open space.

A point of major significance is that over the next decade, Pasco County will experience a demand for 41,000 residential units, but the panel's research indicates that more than 300,000 residential units have been approved for construction, which suggests this supply is adequate to meet the demand for the next 75 years. When supply outpaces demand by a ratio of eight to one, it presents tremendous challenges to the Pasco County leadership, planners, and administrators in prioritizing, directing, and managing growth toward premier place making.

The panel members discussed the challenge posed by the tremendous mismatch between market capacity and approved residential units. Given the dispersion of units approved, the need for some segment of market demand to be channeled to revitalization along the U.S. Highway 19 corridor, and the tremendous costs of providing infrastructure to a dispersed development pattern, Pasco faces critical challenges in achieving its vision. One member of

Land Absorption Projections, Pasco County

Use	Acres
Single family	570
Townhouses and condominiums	100
Rental apartments	90
Industrial	25
Office	30
Retail commercial	25
Hotels	2
Roads and open space	280
Total annual land demand	1,122

the panel, Dan Conway, summed up the panel's consensus by saying:

> I want to amplify the magnitude of your challenge by restating that approved supply dramatically exceeds demand, and it will take 75 years to absorb all the units now approved. In the context of my 45 years of service and more than 10,000 planning assignments, I can say this is one of the greatest leadership challenges Pasco County faces because of the size of Pasco County in combination with the fact that it has five distinct market areas with very different physical conditions and socioeconomic forces impacting each market area. While these present great challenges, when successfully negotiated, they could create premier places if the county acknowledges the challenge and responds with effective leadership.

Sustainable Site Strategies

SUSTAINABLE PLANNING AND DEVELOPMENT approaches begin with site systems—the natural, cultural, and infrastructure systems that inform the uses and activities on the land.

Pasco already has a rich palette of natural and cultural assets that are at the heart of its identity. As the county develops, these assets must not be overlooked. Quite the contrary, they need to be preserved and enhanced if the county hopes to achieve its vision of becoming a premier location.

For instance, Pasco's Land Development Code recommends incorporating low-impact development strategies in the development standards; however, the county would benefit from actually incorporating low-impact development measures into the Land Development Code. The code also has a reserved section for Critical Linkages that would benefit from defining its standards and requirements.

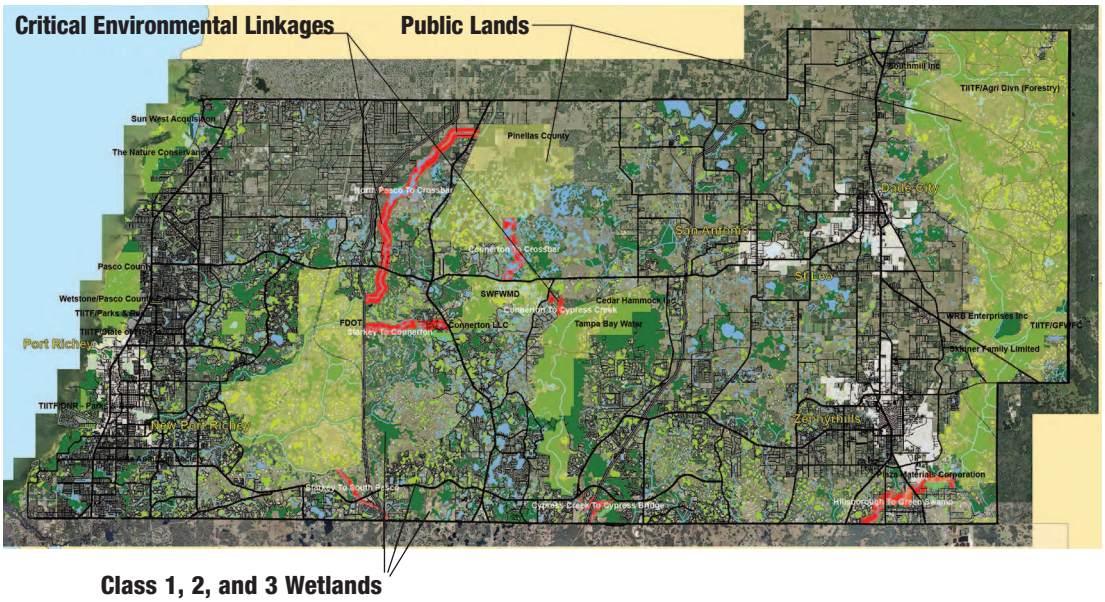
Open Space

Pasco County has assembled more than 30,000 acres in conservation that provide vital ecological and hydrological functions, wildlife habitat, and essential migratory pathways. These lands have been acquired through the Penny for Pasco tax.

The county has also enacted a TDR program, but the panel believes that such a program will never be effective in preserving open space because it creates a disincentive for higher-density development, something the county actually wants to encourage. Moreover, as noted in the discussion of market absorption, development is already so overpermitted that little incentive exists to contribute lands through the TDR program.

The land conservation program has created a terrific asset for the county, but much more work remains to do. Open-land buffers will be needed along the coastal area for resiliency against the increase and intensity of storms,

Ecosystems: Public Lands, Critical Environmental Linkages, Wetlands, Streams, and Lakes



PASCO COUNTY

Pasco offers rich assets in the form of varied ecosystems that provide critical character and opportunities to the county.

greater inundation, and sea-level rise. Open and forest lands are needed to mitigate the impacts of heat island effect and air quality degradation caused by development and increased traffic congestion.

The panel suggests that the county try to create a continuous open-space corridor connecting the conserved lands that reaches from the Gulf to the Green Swamp and integrate these policies in the Land Development Code.

Acquisition could be funded through an Open Space and Agricultural Preservation Trust that acquires only the development rights instead of fee title acquisitions as made in the past. This includes acquiring the rights to Pinellas County's well holding parcel in the north.

This approach can keep agricultural lands in productive use, leverage the county's financial resources to greater effect, and enhance the ability to attract outside funding, while maintaining the county's agricultural heritage. It also supports place-based economic development initiatives such as ecotourism and agritourism, discussed in more detail later in this report.

Infrastructure: Transportation, Water, Waste, Energy, and Public Services

These are critical site systems of urban and economic development. To illustrate the opportunities and challenges, the panel chose to focus on the water system. The principles highlighted here on water can also apply to the other infrastructure systems.

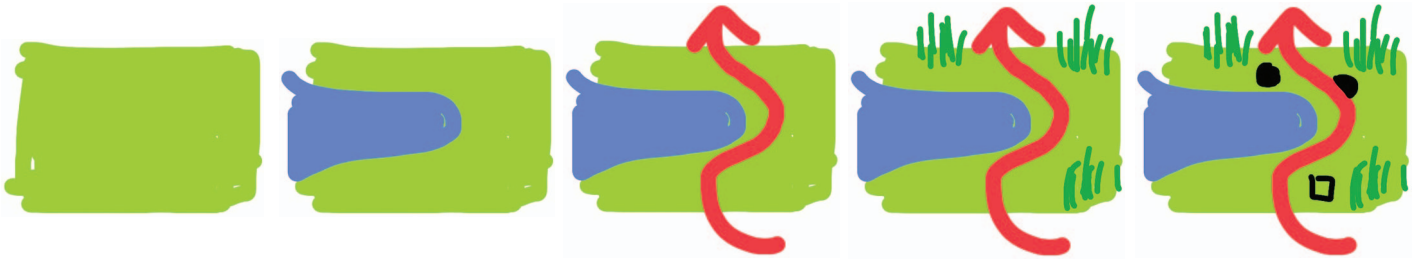
According to Pasco County's Ten-Year Water Supply Plan, it has a reliable source of water from Tampa Bay Water. Pasco County Utilities has implemented progressive water recycling and reuse programs. In general, the panel understands that water supply and treatment is not a concern. However, now is the time to ensure a clean and adequate supply for the following ten years.

Tampa Bay Water's desalinization plant will need to be expanded to meet projected demands. Desalinization is not a benign process. It is highly energy intensive and affects marine ecology at both intake and discharge.

The county needs to assume greater responsibility for stormwater management regulations in light of recent state actions. Many jurisdictions are moving toward innovative "One Water" department organization in recognition that potable water and sewer systems are part of one larger hydrologic cycle. This facilitates cross-disciplinary collaboration on water planning. Collaboration between public works and utilities departments will expand the capacity to implement integrated strategies and optimized performance across the full spectrum of water issues.

Many communities are implementing both green and gray infrastructure as they renovate and expand their storm sewer systems. Green infrastructure, also known as low-impact development strategies, comprises landscape features that serve to capture, store, and slowly release runoff back into the environment. The panel recommends incorporating these strategies in Pasco's development standards for a more balanced water cycle.

Park + Stormwater + Bike Path + Gardens + Art
Targeted interventions with a backing vision will support an enduring sustainable strategy.



Key to all high-performance landscape systems is an integrated planning approach. A simple example involves the planning and management of parks. Instead of parks designed for only recreation use, they can be designed to hold storm flooding, bike paths, and public vegetable gardens. In this way, functions that are the responsibility of public works, transportation, and public health and social services are all integrated into the design. Perhaps a performance space or cultural events to benefits the arts could also be integrated. This integrated approach not only provides cobenefits, but the cross-agency approach also provides the opportunity to share revenues for more efficient and effective use of financial resources.

Summary

Although the panel was able to evaluate site systems and formulate recommendations for only a brief time, the panel suggests the county consider four ways to improve the effectiveness of preservation and enhancement of natural and cultural systems:

- Form an Open Space and Agricultural Preservation Trust to serve as the primary actor for acquiring and preserving open space by acquiring development rights and fostering agricultural vitality. Use the trust to leverage resources from the Penny for Pasco tax.
- Abandon the TDR system because it creates disincentives to the type of development that the county is seeking and the market for development rights transfer is oversupplied.
- Expand ecological planning to create a continuous corridor from the Gulf to Green Swamp.
- Pursue cross-departmental collaboration that promotes integrated infrastructure solutions with broad benefits.

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 IS A PART of the Tampa metropolitan area and directly to the north of downtown Tampa. During most times of the day, the drive from the Tampa International Airport to the border with Pasco is less than 30 minutes. On the west side of the county, U.S. Highway 19, part of the State's Strategic Intermodal System, provides the development spine to more than 200,000 residents and provides about one-third of the tax base for the county coffers. West of the highway is within the High Coastal Hazard Area, is in a flood zone, and has issues regarding redevelopment constraints, whereas the east side of the highway has different constraints related to small parcels, obsolete land uses, and built environment with marginal retail businesses. The east side of the county is served by two-lane U.S. Highway 301, which cuts through the cities of Dade City and Zephyrhills. Major east–west arterials include the four- to six-lane State Road 54 running along the south and southern portion of the county and State Road 52, which turns into a two-lane road at Interstate 75 to Zephyrhills. State Road 56 begins at I-75 and continues past Wiregrass Mall Area. The great preponderance of approved development projects are south of State Road 52. And the preponderance of active development projects lie on either side of the State Roads 54/56 corridor. In early 2014 the Florida Department of Transportation announced funding priority of the expansion of a two-lane State Road 56 from its existing four-lane terminus at Meadowpointe Boulevard to U.S. 301 for construction in 2016.

Because of natural water features, the small number of east–west highways of any capacity has made commuting in the Tampa Bay Area downtown a critical issue for the southern edge of Pasco and the four- to six-lane State Road 54/56 corridor. North–south travel alternatives are more numerous in the Sun Coast Highway and I-75, which go into different parts of downtown. Interstate 4 comes out of Tampa as the direct route to Orlando about a half-hour to the southeast of State Road 54/56.

Pasco County has been known as Tampa's "bedroom community" in that a large percentage of its workforce is employed outside the county proper. For instance, nearly 50,000 members of the Pasco workforce work in Hillsborough County. Although many town or village centers are proposed as parts of the larger planned communities, many of which are over 1,000 acres, none has started construction. The development with the most momentum and retail attraction is around Wiregrass Mall, near the junction of State Road 54/56 and I-75, slightly east of the county's midpoint.

The only public transit service currently in operation is along State Road 54, started in the last year. Bus rapid transit (BRT) and high-occupancy-vehicle lanes are being studied for construction on the Sun Coast Highway and I-75 and points south to downtown Tampa. Completed studies indicate that a transit or BRT alternative will be cost feasible from the Wiregrass Development of Regional Impact to the downtown area.

Pasco Transportation Highlights

Here are key transportation highlights for Pasco County:

- *About 50 percent of workers leave Pasco County every workday.* Pasco County employment growth has lagged residential and retail development. Consequently, about 50 percent of the county's workforce of 200,000 commutes to other parts of the region, the majority to Tampa downtown and the Westside. This exodus in the morning and return in the evening creates bottlenecks at all north–south roads and east–west intersections or interchanges. Pasco commuters are often noted as

the largest contributors of congestion in the Tampa Bay area.

- *Pasco transportation funding flows through an MPO serving only Pasco County.* Despite some collaborative efforts, the county's transportation planning process is centered in a county-based MPO that is the primary funnel through which federal and state transportation funding flows. Every region of the country has an MPO, but the county-by-county MPO configuration in the Tampa Bay region limits resource generation and configuration of transportation solutions.

- *Population growth from 2010 to 2025 may be overstated by at least one-third (600,000 vs. 642,000).* According to the U.S. Census, Pasco County's population was 465,000 in 2010. Updated numbers for 2013 bring that figure to about 480,000. The average housing absorption over the next 12 years is projected to be around 4,100 units. At an average of 2.42 persons per household, that translates to another 110,000 people, or a total of approximately 590,000 in 2025. However, the adopted population forecast for 2025 is 642,000, a forecast population increase of more than 50,000, which may be beyond what is realistic.

- *"Approved" land development will likely take 75 years for the market to absorb.* In addition to the population projections, if the forecasts include projected nonresidential uses for the same time period, those that are included in the approved Master Planned Unit Developments, industrial, commercial, retail, and recreational uses will be grossly overestimated.

- *Many approved and proposed land use plans may not account for current demographic realities and lifestyle choices.* Many of the Master Planned Unit Developments were approved prior to the 2008 financial crisis, reflecting configurations of land uses that were in vogue. After the Great Recession, different demographics are being evidenced, and preferences for lifestyles have changed. Both the younger gen-Yers (those under 30) and the aging baby boomers (those over 55) are looking for more urban living choices with walkable access to other amenities so that every trip need not include the automobile.

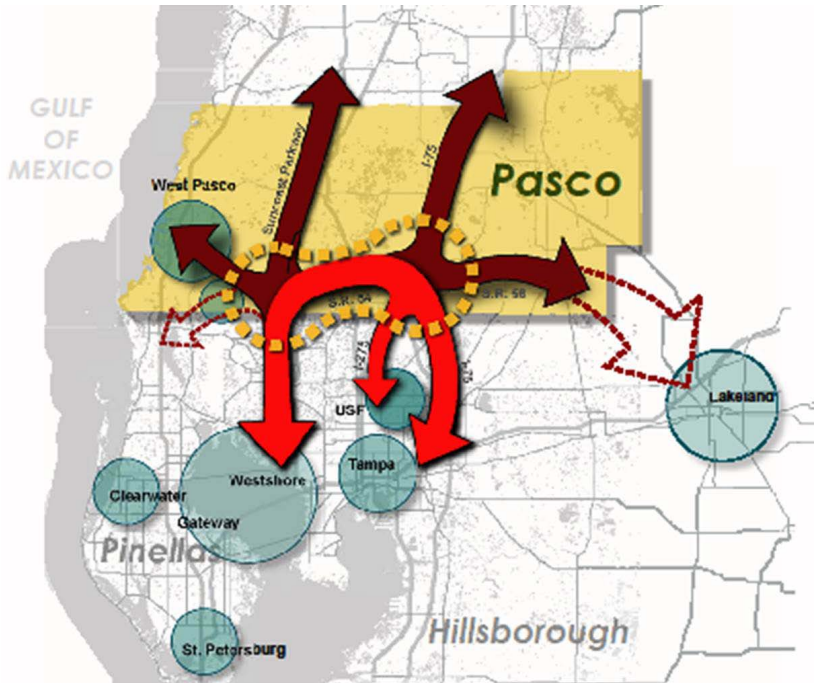
- *Currently most people have few or no transit options.* Although transit is discussed, and many plans attempt to include options in the future phasing, little accommodation is evident in the specific plans that have been approved. An essential component of place making for these future developments will be different forms of transit, whether for a local shopping trip or a commute into Tampa.

- *The county's MPO has estimated that its capital budget for transportation infrastructure has a shortfall of $14 billion.*

- *The county has enacted mobility fees to replace concurrency and development impact fees.* These fees in the Urban Service Area have been structured to provide incentives for commercial development.

- *The county has worked with the Florida Department of Transportation to alleviate the current bottleneck at State Road 54 and I-75.* It is considering a proposal for

Pasco is often analyzed as a northern transportation loop for the Tampa Bay region.



PASCO COUNTY

a privately financed elevated tollway over the median of the State Road 54 alignment. This facility would address the significant existing and projected congestion in east–west traffic flow. Much of the traffic projected to use this facility, however, originates outside Pasco County, reflecting the scarcity of east–west routes in Hillsborough County to the south.

Need for Regional Transportation Solutions

The panel spent considerable time pondering the proposed elevated tollway over the State Road 54 alignment. The panel concluded that the proposal inflicted a considerable burden on Pasco County to solve a regional transportation problem and that Pasco ideally would need to slow down on this project and engage the region in searching for regional solutions to regional transportation problems.

The recommendation to slow down and pursue regional collaboration is based on two important premises: (1) a regional MPO will have more total resources than the collection of single county MPOs both from access to more categories of funding and from the ability to leverage local resources more effectively; and (2) a regional collaboration will generate more options to consider, including bringing back rail, a range of routes for BRT, and grade-separated intersections. Building an elevated freeway in Pasco over State Road 54/56 will create significant barriers to high-quality development in that corridor. Why should Pasco assume the burden of solving a regional transportation problem without exploring other options and accessing regional funding resources? Proceeding with the elevated freeway before pursuing the regional MPO configuration would foreclose possibly superior solutions to the east–west congestion challenge. In the meantime, the continued buildup of congestion may spawn more public support for transit solutions. Among the issues that should be explored regionally are the following:

- Create a multicounty Tampa Bay MPO with regular MPO authority. This may require a change in state law.

PASCO COUNTY

Preliminary concept and location of the State Road 54/56 elevated system.

- Look at transit development more seriously as a trip reduction measure, especially for commuters into Tampa.
- Make BRT services into Tampa a top priority.
- Use multicounty, multiagency partnerships to increase the chance for federal funding such as TIGER (Transportation Investment Generating Economic Recovery) grants.
- Prioritize efforts to make shovel-ready projects.

Need for Reconsideration of Elevated Freeway Design

The panel also discussed other dimensions of the elevated freeway proposal besides as a catalyst for regional collaboration. The proposed design, if the county ultimately decides to proceed, should carefully consider the locations of BRT stations or other local transit stops in relation to the proposed development centers. Eight or ten development centers along State Road 54/56 are not yet specifically planned, although they are conceptually approved. Ideally, these transit or intermodal centers would not be at the existing intersections but would be located in the middle of those developments. Transit users do not generally shift from one mode to another, because the connec-

Regardless of the potential convenience of an elevated road, State Road 54/56 faces several challenges related not just to its capacity and traffic flow. The character of this and similar arteries in the county should be reevaluated, from the way they engage pedestrians, offer potential for traffic connections, and provide an overall sense of improved county identity.

tions become too uncertain and time consuming. These centers need transit to be attractive places to live for many of the younger (and older) residents who would want to live in Pasco. The panel was not made aware of any links between the proposed elevated roads, the transit that would be built eventually, and these new community centers. Another reason to slow the process down is to figure out how those connections would be made. In other words, these centers, although potentially located at transit-oriented development, as they are proposed seem to prioritize highway-oriented development, which presents a substantial incompatibility with what the panel understands the county land use vision to be.

Using the ULI Tampa District Council as a Convener

The panel notes that the Tampa region has experienced a number of ULI Advisory Services panels over the past three years. Building on the success of the Pasco 2008 panel, these more recent panels have addressed development issues in several nearby counties. For instance, they range from addressing sustainable economic development in Hillsborough County to strengthening urban centers in Downtown Tampa, from targeting strategic growth in Manatee County to envisioning a waterfront master-planning process for St. Petersburg. A forum convened by ULI Tampa Bay involving key community leaders and the chairs of these panels may be a good start to the discussion leading to regional cooperation on regional transportation planning and funding.

Economic Development

THE PANEL HEARD REPEATEDLY that the residents and employees of Pasco County believe Pasco is more than simply a bedroom community, as it has become known in recent years. These same people expressed a pressing need to create a better live/work balance in the county to support long-term economic vitality and opportunity for residents.

The panel considered a variety of strategies available to assist Pasco to achieve this goal of balance and concluded that the most effective economic development strategies are built on existing assets. Luckily, Pasco County has many great assets, including existing businesses, a strong workforce, and a vast array of agricultural, historic, and cultural amenities rarely found elsewhere in Florida or the southeastern United States.

However, Pasco also faces some challenges, such as a discrepancy between the skills of its workforce and the quality of the jobs available in the county. Currently, 69 percent of jobs in Pasco do not require a college education, yet 52 percent of Pasco residents have some college education. This mismatch drives some of Pasco's most educated residents, who are also the county's most valuable economic assets, out of the county for work. In fact, about 50 percent of Pasco's workforce travels out of the county for employment, and 22 percent of residents travel 45 minutes or more to reach a job. Imagine how different Pasco would be if more residents were able to work in the county, commute times were reduced, and residents were around during the workday to populate Pasco's restaurants and retail establishments.

To better understand how this discrepancy came to be, understanding how employment has changed over the most recent decade is important. Between 2000 and 2010, employment in the management and professional sector in Pasco County grew by 6 percent; employment in the health and education sector grew by 3 percent; employment in the service industry sector grew by 1 percent; and employment in the professional, scientific, and management sector grew by 1 percent. Conversely, employment declined by 1 percent in the sales sector and by 3 percent in the retail sector.

These facts help illuminate another significant challenge for the county. A distinct disconnect exists between land use and economic development planning across the county and the realities of market forces in Pasco. As discussed earlier in this report, the county is saturated with retail, yet Pasco continues to plan, zone, and entitle more land for more retail uses—often in the wrong places. For instance, some of Pasco's planning models call for retail at the center of developments, the locations farthest from public transit, thus reducing foot traffic at these proposed retail destinations to the residents in the immediate vicinity of the development and rendering the retail financially infeasible. In this scenario, the retail would be more financially feasible if it were situated close to the public transit, thus increasing the foot traffic to the retail destination.

Similarly, the county's "employment centers" are currently designated in remote areas with limited if any transit options and limited highway access. Landowners and developers appear to have used the employment center designation as a means of enabling approval of development in areas that would otherwise be candidates for open-space preservation. The panel recommends that the county consider relocating employment center designations to the areas served by transit and close to highways and other previously developed areas.

The panel learned from its interviews that Pasco residents are seeking more diverse retail amenities, but shopping

centers cannot attract a variety of tenants because the customer base is insufficient to support these operations during weekdays, given that about 50 percent of Pasco's workers leave the county every day. Solutions exist to fix these disconnects, and the panel has carefully crafted recommendations for Pasco that will enable the county to most efficiently deploy its existing assets and overcome some of these challenges to create economic prosperity.

Direct 75 Percent of Business Development Efforts to Existing Businesses

The most efficient way of directing Pasco's business development efforts is to work with the businesses that are already here and already contributing to the tax base: 86 percent of Pasco businesses employ eight or fewer people. If half these small businesses add just *one* job, that's nearly 3,000 new jobs for Pasco, *by* Pasco.

The Pasco EDC does a good job of supporting micro-lending and creating business incubators, but the panel recommends that small business development become the primary focus of the county's economic development efforts, dedicating 75 percent of Pasco EDC's efforts toward fostering entrepreneurship and growing existing businesses. One way to support that endeavor is to review all public expenditures and county contracts and to make a commitment to direct 50 percent of public purchases of goods and services to local businesses and direct 25 percent of those purchases to small businesses, whenever feasible.

Direct 25 Percent of Business Development Efforts to the Health Sector

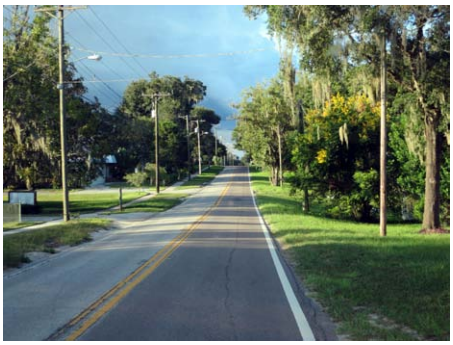
As discussed earlier in this report, one-third of the projected new jobs created in the county will be in the health care sector. This sector provides a broad cross section of job opportunities at all skill levels, such as physicians and nurses, rehabilitative support services, assisted-living facilities, medical device development and manufacturing, research and development, and wellness and public health. Therefore, the panel recommends directing the remaining 25 percent of business development effort toward exclusively marketing the county to the health sector and its related subsectors. These efforts should include identifying health care companies that are poised for growth, visiting those companies and pitching them to locate in Pasco, and developing tools that will entice these markets to pick Pasco over other viable markets.

Prepare to Accommodate Growth of the Health Sector

Pasco is uniquely situated to take advantage of growth in the health care sector; however, the ultimate realization of this growth will depend on how well prepared Pasco is to accommodate the sector and its workforce. Therefore the panel recommends that Pasco prepare to accommodate the anticipated large-scale growth in the health sector by taking the following actions:

- Planning, zoning, and providing incentives for health care–related industries to locate close to the ten existing hospitals and medical centers;
- Permitting a variety of workforce housing near the hospitals, including townhouses and multifamily units, to meet the housing needs of health care workers at all salary levels;
- Introducing transit options to connect the hospitals to high-density population areas, to provide cost-effective and convenient commuting options for the workforce;
- Directing workforce training efforts to the health care fields; and
- Focusing on health care–related tenants to retenant the vacant hospital in New Port Richey.

Also as noted earlier in this report, another one-third of new jobs in Pasco is expected to come from the financial services industry. Obviously, this is a significant growth opportunity for Pasco. The addition of several thousand new financial services jobs from Raymond James Financial



Pasco offers gems through its distinct landscape, with a charismatic sense of place.

and T. Rowe Price will be a catalyst for new growth in and around those locations. Because the county has already dedicated significant financial incentives to these two financial services giants, the panel does not feel the county should spend more time or resources with promotion to the financial services industry, which will likely grow on its own with the addition of these two large financial services companies.

Focus the Existing Workforce Development System

Pasco offered workforce training and development programs to its residents, and the panel applauds these efforts. However, challenges seemed to exist in gathering timely information about existing workforce development programs; where this information is made available, it should provide broader detail with respect to programming, alignment with businesses and higher education, and most important, measurable outcomes. No more important economic development tool exists than a well trained workforce. Therefore, the panel recommends that the county develop a more focused, coordinated, and targeted workforce development program by taking the following actions:

- Invest more resources (both fiscal and staff), and leverage outside funds to make strategic investments in targeted workforce development programming.
- Prioritize the areas of workforce training and development toward the health and financial services fields. The existing career academies are a terrific resource; however, the county should be careful not to dilute its offerings but rather focus them on the county's future growth sectors.
- Establish and maintain a workforce training consortium made up of public and private leaders in education, business, government, and community. This type of consortium must include participation of private entities such as St. Leo University and Rasmussen College, which are able and willing to supplement public programming.
- Establish measures by which to monitor outcomes and track job placement rates of graduates. If workers completing these programs are still unable to find work and the needs of businesses are not being met, then adjustments must be made to ensure that these programs are more successfully aligned with the needs of the local economy.
- Establish a Workforce Training Fund and provide matching grants to employers to provide individualized training programs to new or existing employees on that employer's specific need or equipment that builds upon the existing training grant programs currently offered through the Pasco Hernando Workforce Board (Career Central).

Leverage Pasco's Distinctive Natural Resources for Economic Development Gain

The natural beauty of the landscape in the eastern portions of the county, coupled with the water resources—including both the Anclote and Pithlaschacotee rivers and the coast to the west—make Pasco one of the most distinctive places in the state. The panel recommends that Pasco take the following steps to maximize its locational opportunity:

- Embrace Pasco's reputation as "Florida's best-kept secret" rather than abandoning it. This mantra, and Pasco's natural beauty and diverse landscape, sets it apart from the rest of Florida in a positive and unexpected way.

- Focus on ways to promote tourism, and specifically ecotourism, as a real economic opportunity for the region. Ecotourism is the highest per capita revenue generator of all tourism industries.
- Make significant investments to preserve and protect the county's natural assets and to unlock access and visibility to the coast.
- Investigate ways to leverage economic gain from the preservation areas through farming and other agricultural activities.
- Support and enable development along the U.S. Highway 19 corridor to attract tourists, recreational consumers, and private investment along the coast. Recreational projects, such as the proposed Sunwest Resort in the northwest corner of Pasco, may serve as an example of the type of project that could introduce new investment in the coastline and catalyze redevelopment.
- Consider replacing the county's "Room to Grow" slogan with a more dynamic representation of all that Pasco has to offer. Pasco is far more than a place to develop green space, and the county's branding strategy should acknowledge it.

Focus on Redevelopment, Particularly along the U.S. 19 Corridor

In addition to the opportunities presented by the rural areas of the county, the existing developed spaces offer a lot of opportunity. The panel recommends that Pasco seek to maximize the potential of those locations by using some specific tools that are intended to attract new life in previously depressed areas, including the following:

- Business improvement districts can be used in existing town centers to assist small businesses to reinvest in properties and enhance the character of communities.
- Job creation incentives should be directed to existing employment areas, and higher incentives should be available to employers willing to locate in downtowns and the U.S. Highway 19 corridor.
- Redevelopment incentives should be offered along the U.S. Highway 19 corridor by establishing targeted redevelopment priorities within the Urban Service Area.
- Public/private partnerships should be used to redevelop existing building stock along U.S. Highway 19 and in other developed corridors to accommodate the vertical space needs of new businesses.

In conclusion, the panel recommends that Pasco focus its economic development efforts in the following ways:

- Focus 75 percent of its efforts on small businesses and entrepreneurs.
- Target business recruitment efforts to the health sector and related subsectors.
- Consolidate or relocate "employment zones" to avoid sprawl and enhance transit.
- Invest in targeted, agile workforce development programming that is aligned with the needs of employers and focused on the anticipated growth of the health and financial services sectors.
- Leverage the natural assets of the county for ecotourism.
- Encourage reinvestment and redevelopment in the depressed commercial areas of the county.

Development-Shaping Strategies

THE PANEL HAS NOTED THE FOLLOWING market opportunities that will arise over the next decade that the county should consider in its development strategy:

- 315,000 square feet of office space annually;
- 240,000 square feet of retail space annually;
- 70 hotel rooms annually; and
- 4,100 residential units annually.

The bottom line for this market context is opportunities for jobs, revenue, and well-planned transit-friendly growth.

At the same time, the tremendous oversupply of approved residential development creates the challenge of how it should be allocated and whether enough market demand will remain to attract investment in the revitalization and conversion of the obsolete development patterns along the U.S. Highway 19 corridor. The county's redevelopment efforts there have lowered infrastructure fees and streamlined entitlement, but additional effort is needed to aid conversion of these obsolete development patterns.

Specifically, the county needs to allocate resources and focus on items such as site assembly for reconveyance, land writedowns, and provision of infrastructure. Redevelopment on these assembled sites should include mixed-use villages that incorporate substantial residential uses with walkability and transit connections to recreation and commercial amenities. This redevelopment segment of development is not listed on the "approved" development rolls of the county and will absorb a portion of the market that would otherwise be absorbed by greenfield development. It has been pointed out repeatedly that it is cheaper to build on vacant greenfields than on infill sites. Revitalization policies do not have to be limited to redevelopment incentives but can also include limiting greenfield growth. The panel recommends constraining large-scale greenfield development by limiting construction of utilities and infrastructure in areas where preservation of open space, agricultural, parks, and recreational uses is deemed desirable.

Inherent in the U.S. Highway 19 revitalization will be numerous partnerships. The panel suggests that the process of forming a public/private partnership begin with a dialogue on community values or community visioning. Private sector investment can help achieve Pasco's vision as long as clarity exists on what that vision is and appropriate financial assistance is available that addresses the gap in the costs that are supported by a market return and the additional costs needed to cover the full costs of achieving the community vision.

The strategy of starting first with a dialogue that explores possible options is based on ULI's experience in first creating a foundation for a partnership before moving ahead with business terms. For additional background on how this process works, the panel suggests reviewing the ULI publication *10 Principles for Successful Public/Private Partnerships*, which documents principles to guide community leaders, public officials, and private investors and developers in how to approach the considerable work necessary to achieve successful partnerships. The ten principles create a framework of preparation, common vision, and trust as the foundation for moving forward.

One element implicit in the process of forming a public/private partnership is putting skilled actors at the table both for the private and public sectors. Here are two suggestions:

The county should engage a professional economist to prepare a retail market analysis that examines the potential for community-based retail, such as a grocery-anchored center that accommodates the everyday needs

10 Principles for Successful Public/Private Partnerships

1. Prepare properly for the public/private partnership
2. Create a shared vision
3. Understand your partners and key players
4. Be clear on risks and rewards for both sides
5. Establish a clear and rational decision-making process
6. Make sure all parties do their homework
7. Secure consistent and coordinated leadership
8. Communicate early and often
9. Negotiate a fair deal structure
10. Build trust as a core value

of residents within the trade area. Blighted neighborhoods are many times drastically underserved. Built-in market demand may well exist that can drive deals on underused or vacant strip centers that have easy access and high visibility. A confirmed market demand can enhance and expedite the developer solicitation process. Development of grocery-anchored centers can act as catalyst projects and be seen as "early wins." Ten to 15 acres is typically the size of sites needed for assembly for this type of redevelopment, resulting in a 100,000- to 150,000-square-foot development. The community frequents these types of centers two to three times per week.

By adding a modest amount of nonretail space, such as civic, community, or cultural uses, complemented with well-designed landscaped amenities such as a plaza, a fountain, or similar gathering spaces, the development can provide a community connection and do much more than meet shopping and dining needs. Adding the aforementioned place-making elements, blended with a thoughtful tenant mix, can provide the community with a local town center that becomes part of the fabric of the district or neighborhood. The design and construction costs to incorporate these elements constitute a relatively small percentage of the total development costs but create an extremely high return to the community.

Incorporating these community design aspects into the developer solicitation documents conveys the redevelopment goals and objectives to the private sector early and increases the chances for delivering a successful project to the residents and to the local workforce. From a tenant mix perspective, larger-format anchor stores and national chains can easily coexist with several local independents. Creating this blend can result in a sense of authenticity and further enhance a connection with the community.

Part of the early dialogue for creating a possible partnership should include conversations with developers on what opportunities exist on the U.S. Highway 19 corridor. The county should explore redevelopment project options and their economics before engaging in site assembly. With an understanding of options and the site assembly needs, complemented with the aforementioned market feasibility analysis, the county can then proceed to structure a viable project.

In addition, the county should evaluate its understanding of real estate finance issues and should decide whether to bring additional expertise into the process.

Finally, any actual deal that results from the process should be formed in an open and transparent manner with validation of its soundness by an outside third party. Without openness, transparency, and validation, the public support necessary to implement a public/private partnership will not occur.

Outside the U.S. Highway 19 corridor, the county needs a comprehensive policy that channels development to major corridors and avoids the sprawl that could occur if all the overentitlement of residential units were allowed to develop. Specifically, the county should explore strategies to achieve the following objectives:

- Regular local bus or BRT service is available along the corridor.

- Diverse shopping and entertainment uses are focused around transit stops.
- Higher-density residential is located one block off the retail corridor.
- Residents can walk to a transit stop and go several stops for multiple destinations.
- Residents can eliminate car trips and sometimes have no car.
- Development encourages walkable communities around transit with a reduced carbon footprint.
- County strategy encourages other mixed-use infill between stops as services increase.

With respect to retail/residential mixed use, the panel heard of several instances in which the county was interpreted as using a confrontational approach with developers to require them to design vertical mixed-use projects. In communities where surface parking predominates and where rents are modest, the chances for success may be quite limited. Vertical mixed-use projects are difficult to finance, they are difficult to lease on the ground-floor level, and the pool of developers is very limited. Horizontal mixed use, in which housing is developed immediately adjacent to the retail, will be much more likely to meet market acceptance and prove to be far less financially challenging.

Last, the county should use its open-space preservation and infrastructure investment policies to channel new development into, primarily, the 54/56 Gateway Crossings market area so that growth is concentrated and not dispersed. As noted in the section on "Economic Development," the county has designated numerous areas as "employment zones" in what appears to be an attempt by landowners to gain a foothold as an approved development area. Many of these employment zones have substantial residential development included in the entitlement. As noted previously, the county should attempt to consolidate and reduce these employment zones as part of an overall strategy of channeling growth to areas that can be efficiently served with infrastructure and transit.

Dispersed growth patterns will be expensive to serve and will perpetuate the suburban growth pattern that is becoming obsolete.

Leadership

WITH THE ADOPTION OF THE STRATEGIC PLAN and Core Values, the county articulated value-driven strategic objectives as its leadership framework. The values are clear:

- Respect;
- Integrity;
- Innovation;
- Service excellence; and
- Quality.

The panel applauds this framework and the specific actions the county has taken to fulfill its promise. Changes to the organizational culture and adoption of the market areas, specifically, the West Harbor Plan, the Urban Service Area, mobility fees, and other significant policy initiatives have all been consistent with this framework. But living these values over the long term, especially as the economy recovers and development proposals become enlivened, will be critical to success in achieving the county's vision in the future.

The long-term challenge is particularly critical within the county organization. An organization's culture is hard to change, and alignment of actions with stated goals requires vigilant and effective leadership, especially now, at the beginning of change. The panel heard of several examples where members of the Board of County Commissioners engaged in the old behavior of intervening on behalf of developers in staff interactions. The panel also heard from developers about demanding and confrontational interactions with staff on development standards. These incidents might be just anecdotal and not prevalent, but they highlight how difficult organizational change is. They are also to be expected when changes of the magnitude attempted by Pasco are in progress. It will take time to generate and sustain a different organizational culture. The leadership challenge is to live the values and create trust that the change is real. The challenge includes changing the tone of dialogue with the development community from confrontation to consultation. The challenge includes recognizing the realities of the market place: the development community is diverse, and some developers "get it" when new sustainable development standards are being discussed while others will need time to understand the value of responding to a new market. The leadership challenge, then, is one of persistence in acting the values and openness to dialogue on how best to achieve them.

The panel also heard skepticism from the public about the validity of the change and about the county's ability to actually do what it says. Many members of the public endorsed the values and the direction in which the county seems to be going but felt that the change process was too opaque and unreliable. This skepticism is understandable, given that the change is relatively recent, but it does highlight the need for further action that will embed the change within the community over the long term.

The panel suggests two actions by the county that will help embed the change within the public and increase trust:

- First, the county should create for each market area a citizen planning council to serve as a forum for policy formulation and development proposal review in that market area. These market area planning commissions will increase transparency and ownership of development policy within each market area.
- Second, the county needs to form stronger partnerships with each of the six cities within the county on areas of

Small urban areas throughout the county, such as the pictured New Port Richie, have the urban elements, morphologies, and typologies to enable Pasco to expand and promote its character.

common interest. Land use policy within and surrounding each city is one area where the county and cities can partner. Other areas include historic, cultural, and agricultural preservation; ecotourism; and economic development.

Exercising effective leadership is the single most important task the county faces in achieving its vision. This task requires consistency between word and deed. It requires sharing power, and it requires creating ownership among a broad cross section of stakeholders. It requires courage and it requires patience. But, without it, the county will fail to achieve its vision.

Funding for Quality of Life

THE PANEL WAS STRUCK BY HOW MUCH Pasco has done to overcome its revenue deficiencies compared with other Florida counties. With revenue less than half of what adjacent counties have, Pasco has still managed to set aside a portion of the Penny for Pasco funds for economic development and open-space acquisition. However, the panel concluded that if Pasco is serious about its vision, it must connect more resources to achieving it and do a better job of identifying shortfalls. The panel identified four areas where additional resources and work are needed:

- **Funding needed for site assembly to enable West Harbor redevelopment:** Currently, the county has not allocated any resources from the West Harbor Redevelopment Area. The tax increment is used for transportation, divided between funding a buydown of the mobility fee and bus transit service in the corridor. But without funding site assembly and subsequent reconveyance, redevelopment along U.S. Highway 19 will not occur.
  - *The county should allocate a significant portion of the redevelopment tax increment to land assembly along US Highway 19 to acquire sites of sufficient scale that they can be reconveyed for development of mixed-use villages that have significant residential uses and are connected to recreation and commercial amenities.*
- **Funding needed for recreation, arts, cultural facilities, and libraries:** The county has $20 million in capital funds to build parks but has halted construction of new parks because annual revenues are insufficient for maintaining them. In addition, funding for arts, cultural facilities, and libraries is significantly deficient. These dimensions are components of a "premier" county and need resources to be viable.
  - *The county should enact the five-cent gas tax to fund transportation, which would enable the transfer of $3.5 million of transportation funding from the Penny for Pasco funds to parks, libraries, and cultural facilities. The net increase in transportation funding is estimated at approximately $3 million as a result of using the five-cent gas tax to allow the shift in funding from the Penny for Pasco.*
- **Funding needed for enhanced ecotourism facilities and services:** Resources available to stimulate ecotourism, a major economic development opportunity, are scarce. A clear and responsible investment program for ecotourism could provide the framework for funding from an increase in the room tax from its current 2 percent to 4 percent.
  - *With a clear expenditure program, increase the room tax to 4 percent to fund ecotourism programs and facilities.*
- **Expansion of capital improvement plan needed:** Although the county has developed a capital improvement plan as part of its annual budget, the program fails to identify unfunded needs. The county needs to expand the capital improvement plan program to identify the elements that could contribute to fulfilling its vision but are unfunded. Without this information, the county has no way of working with outside agencies and funding.
  - *The county needs to complete the capital improvement planning process by identifying the unfunded quality-of-life priorities, including parks, culture, community activities, and libraries.*

Deciding to fund the quality-of-life issues will be vital to the county achieving its vision. And such funding decisions have another significant benefit: they will put Pasco in the

position of leveraging its own locally funded investments in quality of life to attract outside funding. For instance, the state of Florida has failed to fund operations at a 5,000-acre state park just west of U.S. Highway 19 along the Gulf coast. Opening such a facility to ecotourism would contribute to economic vitality in Pasco. The argument in favor of the state fulfilling its responsibilities becomes stronger if Pasco has done its share.

Pasco County's efforts to face pressing development challenges display a commitment to progress that will reward its residents and the region at large. This energy is engaging and celebratory, as advertised by the Pasco EDC in the November/December 2013 issue of Urban Land *magazine.*

Conclusion

PASCO HAS EMBARKED ON A CHANGE to its land development patterns that many communities need to make and few will have the courage to do. The progress that Pasco has made since 2008 in planning, organizing, and articulating the values underlying this change is impressive. These changes have included:

- Recognizing the unique needs of the five different market areas by formulating specific plans for each;
- Adopting a Strategic Plan with core values as a framework for implementing change and building trust;
- Reorganizing the EDC and adopting a new Economic Development Plan that focuses on existing business needs and creates a framework for promotion and business attraction;
- Funding open-space preservation with an allocation from the Penny for Pasco;
- Reorganizing development regulation to streamline development approvals, consolidate authority, and create a more open and transparent process; and
- Replacing the development impact fee system with mobility fees that provide incentives to commercial development in the Urban Service Area and establishing a known schedule of fees so that developers can see upfront what they are (as opposed to the prior system where fees were determined late in the predevelopment process).

These actions have created a solid base upon which to act. The county faces significant challenges described in this report, which include the following:

- Approved growth far exceeds the market absorption capacity.
- Open-space preservation needs to continue using a new more effective tool, an Open Space and Farmlands Preservation Trust.
- Redevelopment and revitalization of the U.S. Highway 19 corridor will require funding to be allocated to site assembly and for the county to learn how to successfully convey sites for redevelopment through public/private partnerships.
- The project for placing an elevated tollway along the State Road 54/56 alignment should be deferred, and the county should engage with the other three Tampa Bay Region counties to explore the possible creation of a regional MPO. This exploration should also address the possible establishment of a BRT system to Tampa and the creation of other solutions to the east–west traffic flow.
- The tone of interaction with the development community needs to change from one of confrontation to one of consultation.
- The county should create market area planning commissions to enhance community ownership and openness and transparency in development policy decision making.
- The county should partner more with each of the six cities on areas of common interest.
- Economic development efforts need to capture opportunities in medical services and ecotourism while enhancing workforce development and providing greater choices of commercial space for new small businesses.
- Development needs to be channeled to the U.S. Highway 19 corridor and the Gateway Crossings area.

- Funding for recreation, cultural facilities, and libraries needs to be made available by enacting the five-cent gas tax.
- Ecotourism enhancement needs additional funding by establishing a clear expenditure program as the basis of increasing the room tax from 2 percent to 4 percent.
- The capital planning process needs to be fully enlivened to identify unfunded priorities.

This is quite a list of tasks—one that will require extremely hard work. But success in accomplishing these tasks really depends on one factor: leadership. The county has articulated its vision as being a premier county. It has articulated its values of respect, integrity, innovation, service excellence, and quality. But leaders are effective only if they build trust that what they say is what they will do. Pasco will succeed or fail based on whether it acts consistently with its articulated vision and values. The panel believes that the county is committed to do this. The panel hopes the recommendations it has offered for how to do this will help the county fulfill its leadership commitments.

Finally, the panel hopes the exploration of regional funding and solutions to transportation issues can proceed expeditiously. The panel has suggested that the ULI District Council in Tampa Bay assume a role as a convener for initiating these regional discussions. The panel believes these discussions are both timely and vital to the region's success.

About the Panel

John L. Knott

Panel Cochair
Charleston, South Carolina

Knott is an internationally recognized leader in the regeneration of urban real estate, infrastructure, energy, and environmental systems. He is the creator of the CityCraft process, which is a development and city planning process that restores the economic, environmental, and social health of cities. Knott is a recognized thought leader and keynote speaker on sustainable development, the green economy, and restoration of cities.

A third-generation developer, Knott has over 40 years of experience in urban redevelopment. His award-winning projects include work at the Baltimore Inner Harbor and other urban areas in Baltimore and Washington, D.C.; the University of Texas Health Science Center in the Houston Medical Center; Dewees Island in South Carolina; and the Noisette Community of North Charleston in South Carolina.

As the Health Product Declaration Collaborative's first executive director, Knott works with companies and individuals committed to the continuous improvement of the building industry's environmental and health performance through transparency and innovation in the building product supply chain.

As president, CEO, and cofounder of the Noisette Company LLC, Knott leads the Noisette Project development team, which has collaborated with the city of North Charleston, South Carolina, in the sustainable restoration of 3,000 acres of the city's historic urban core and areas of the former Charleston Naval Base. Knott also served as the CEO and managing director of Island Preservation Partnership, which developed the 1,206-acre Dewees Island oceanfront retreat dedicated to environmental preservation.

Charles A. Long

Panel Cochair
Oakland, California

Long is a developer specializing in mixed-use infill projects, including acquisition, entitlement, consulting, and development. He has 37 years of diverse experience in local government and development with an emphasis on economic development, finance, management, and public/private partnerships.

He served for eight years as city manager in Fairfield, California. Since 1996, he has worked as a consultant to public and private clients on development and management. His work on development is focused in California with an emphasis on public/private partnerships and mixed-use infill. He has held interim positions for several cities in finance, redevelopment, and management, including interim town manager of Mammoth Lakes and interim city manager of Pinole and Hercules, California. His assignments have been diverse, including negotiating development agreements, writing redevelopment plans, preparing pro forma analyses, strategic planning, economic development, organizational development, capital and financial planning, budget reform, base reuse, and alternative energy development. Long has overseen more than $600 million of public financing in his career.

Long is a full member of the Urban Land Institute and, within ULI, a member of the Public Private Partnership Council and a faculty member of the ULI Real Estate School, teaching both in the United States and internationally. He has worked on 16 ULI Advisory Services panels, chairing panels in Salem, Oregon; Boise, Idaho; Dallas,

Texas; and Buffalo, New York. He is the recipient of the 2012 Robert M. O'Donnell Award for distinguished service in the advisory program. He is cochair of the Sustainability Committee for the San Francisco District Council and, in that capacity, initiated several reports including recommendations for streamlining California's environmental review process and a directory of financing sources for building efficiency. He is also building a program called Real Estate 101 for Public Officials, training a volunteer faculty to teach public officials about how to do public/private partnerships. He is the author of the book *Finance for Real Estate Development*, published by ULI in April 2011, and winner of the 2012 National Association of Real Estate Editors Silver Award.

Long has a BA in economics from Brown University and a master's of public policy from the University of California, Berkeley.

Dan Conway

Aurora, Colorado

Conway is a real estate marketing and research authority specializing in residential, commercial/industrial, and golf course developments. He has had over 40 years of experience as an urban land economist. Conway is a frequent guest speaker for economic associations and trade organizations and is a member and frequent speaker to the Urban Land Institute. He has been a real estate and urban land economic honorarium instructor at the University of Colorado and at the University of Denver. He has published many articles including the CCIM magazine piece "Market Analysis, the Road to Profit, Prosperity and Peace of Mind." Conway's other professional and community activities have included membership on the board of directors of a federally chartered national bank. He also participated on the Archbishop's Inner City Sun School Committee to assess the future needs of elementary education in inner-city Denver.

For the last 25 years as president and director of economics and market research for THK Associates, Conway has conducted numerous residential, commercial, industrial, and golf course economic feasibility and market studies, socioeconomic impact assessments, and financial planning studies in all 50 of the United States as well as a number of foreign countries.

Projects of particular interest include an international market center and industrial market analysis for the Dove Valley Business Air Park in Arapahoe County; a residential and related uses market analysis for several major developments in Douglas County, including the 1,342-acre Parker City site; and numerous golf course feasibility studies throughout the country. Specific communities where Conway has completed a wide range of research and analysis include Las Vegas and Reno, Nevada; Oxnard, Palm Springs, and Carmel, California; Kansas City, Missouri; Oklahoma City and Tulsa, Oklahoma; Austin, Texas; Albuquerque and Santa Fe, New Mexico; Seattle, Washington; and Phoenix and Tucson, Arizona.

Most recently, Conway has gained recognition as a sought-after speaker on the golf course development circuit. His numerous presentations at the Crittenden Golf Development Expos have been widely attended and universally applauded. His book *The Cost and Revenues of a Unique Golf Club* has furthered his reputation as one of the industry's leading authorities. Under Conway's guidance, THK Associates completes over 75 golf course feasibility studies and golf driving range market studies and appraisals each year.

Diane Dale

Alexandria, Virginia

Dale is a planner with 30 years of experience working with communities around the globe. Her portfolio represents a continuum of advancements and innovation that are models of sustainable planning and development. Trained as both a designer and a lawyer, Dale brings unique skills in analysis, strategic thinking, and communication that are highly effective in addressing the challenges of community planning. She approaches planning through an integrated and systems-based conceptualization process in which energy, water, waste, and other site systems are early and key informants of community.

Dale leads one of AECOM's Centers of Excellence in Sustainability. Her studio is focused on front-end planning services to address sustainable planning and development, climate adaptation, and resiliency. They employ bespoke tools that provide quantitative analysis of impacts and modeling for robust comparison of alternatives. Most recently, she directed the Long Island Regional Sustainability Plan under New York State Energy and Research Authority's Cleaner Greener Program, which was established by Governor Cuomo to advance greenhouse gas emission reduction goals while promoting economic development.

Before joining AECOM, Dale was the director of community design at the sustainable design thought-leadership practice of William McDonough + Partners. She worked closely with Bill McDonough to translate the innovations in green buildings to the scale of community planning. She was project director for the Master Plan and Green Infrastructure Redevelopment of the Ford Rouge Center, Dearborn, Michigan, a widely recognized model of sustainability. Her work on sustainable strategies for the University of California, Davis's Long Range Plan and on Park 20|20 Sustainable Master Plan, Haarlemmermeer, the Netherlands, received American Society of Landscape Architects Honor Awards in Planning.

While Dale was at William McDonough + Partners, the firm received the Smithsonian Cooper-Hewitt National Design Award for Sustainable Design, and her innovative plans for Hali'imaile, an affordable and sustainable community on Maui, was included in the 2010 Green Communities exhibit at the National Building Museum.

Dale is a frequent speaker on topics of sustainability at conferences and universities and has published in *Urban Green*, *Places*, *Landscape Architecture*, and the University of Virginia's *Virginia Environmental Law Journal*. She received a bachelor's in landscape architecture from SUNY College of Environmental Science & Forestry, a master's in landscape from University of Pennsylvania, a Fulbright Scholarship to Università di Genova, and a JD from the University of Virginia. She was elected to the Council of Fellows of the American Society of Landscape Architects in 2010.

Ron Gerber

Walnut Creek, California

Gerber is the economic development manager for the city of Walnut Creek, California. He was selected to fill the City Council's newly created position in September 2011. He is responsible for business attraction, retention, and expansion efforts for the community. Among his duties is developing a business strategy for the 40-year-old, 240-acre Shadelands Business Park, undertaking property disposition matters related to city-owned properties, attracting a boutique hotel to the downtown, and helping expand the retail/restaurant mix north of Mount Diablo Boulevard.

Before coming to Walnut Creek, Gerber served for ten years as the economic and redevelopment administrator for the city of Novato where he was a key team member who helped transition the 600-acre former Hamilton Field military base into civilian use. Considered by many to be one of the most successful base reuse projects in the country, nearly $1.5 billion in private investment was generated in ten years that encompassed 550,000 square feet of offices and technology space, 2,100 new homes, a hotel, restaurants, cafés, artists' studios, open space, hiking trails, and one of the largest wetlands restoration projects in the United States. Gerber also led the city's downtown revitalization efforts, including a main street redevelopment project that involved a 37,000-square-foot Whole Foods with 124 units on the air rights above the store and a three-level parking structure. He worked closely with the development team of the Lalanne Group and Signature Properties to bring the project to fruition.

From 1989 to 2001, Gerber served as a project manager for the Emeryville Economic Development and Housing Department, where he spearheaded property acquisition, disposition, brownfields redevelopment, and business attraction efforts. His accomplishments included such projects as the Bay Street urban infill mixed-use lifestyle center, the Pixar campus, and Ikea.

April Anderson Lamoureux

Boston, Massachusetts

Lamoureux is president of Anderson Strategic Advisors LLC, a consulting firm that specializes in land use and development and in building productive public/private partnerships that grow economies. She has spent her career working to increase the effectiveness and efficiency of government and to assist businesses to successfully manage their interactions with government at all levels. She has held senior economic development positions within the administrations of Massachusetts governors Deval Patrick and Mitt Romney, served as the Pioneer Institute's director of public affairs and as the director of the Center for Urban Entrepreneurship, and served in senior staff roles within the Massachusetts House of Representatives and Massachusetts Senate.

With extensive experience navigating federal, state, and local government regulations, and particular expertise in land use and development, Lamoureux specializes in economic development strategy, infrastructure financing tools, public/private partnerships, and government relations. Among her many accomplishments, she created and implemented Massachusetts's first comprehensive regulatory reform agenda that eliminated or streamlined hundreds of state regulations across all secretariats of the Patrick administration, and she created and implemented the Chapter 43D Expedited Local Permitting Program enabling six-month local permitting in more than 80 cities and towns in Massachusetts. She also created and implemented the MassWorks Infrastructure Program, a $350 million infrastructure grant program to support housing and economic development projects, and she oversaw the successful deployment of the $556 million American Recovery and Reinvestment Act Recovery Zone Bond Program, including private activity bonds and municipal infrastructure bonds.

She is a 2013 judge for the nationally recognized Pioneer Institute Better Government Competition, and she sits on various boards and committees, including the University of Massachusetts Building Authority board of directors, Leading Cities board of directors, Fuller Village board of directors, and the Town of Milton Granite Avenue Reuse Committee.

William C. Lawrence

Providence, Rhode Island

Lawrence brings more than 30 years of in-depth background and experience in real-world problem solving, strategy formation, feasibility assessment, and project management for complex real estate development projects to Cityscope Inc. Founded in 1995, Cityscope is a real estate consulting, brokerage, property management, and development company. It specializes in evaluating the market and financial feasibility of larger-scale projects of all types. When project potential looks particularly attractive, the firm assembles multidisciplinary teams to implement a development program and acts as the project developer.

Before restarting Cityscope in 2013, Lawrence was the managing director, consulting services, for TR Advisors (TRA) for five years, a Boston-based boutique real estate consulting and asset management firm with specialized expertise in the disposition and management of transportation-related and publicly owned real property. TRA is designated real estate representative for the Massachusetts Bay Transportation Authority in the greater Boston area. With Jones Lang LaSalle, TRA is managing different aspects of the Chicago Transit Authority's real estate assets. Lawrence managed numerous market and financial feasibility studies for communities with transit-oriented development and intermodal transportation facilities.

Before starting Cityscope, as director, seaport planning and development, at the Massachusetts Port Authority, Lawrence planned and developed a diverse portfolio of public sector real estate assets on 400 acres. Before that, he created and directed public sector real estate consulting groups in Los Angeles and Boston for Kenneth Leventhal & Company, a national CPA firm. Prior to that, he founded and managed for 12 years the William C. Lawrence Company, a market feasibility and economic development consulting firm located in Pasadena, California, and for

three years, he managed environmental policy planning at the Irvine Company, a large new community developer in Orange County, California.

Lawrence has a master's degree in city and regional planning from the Harvard University Graduate School of Design, a master's degree in business administration from Pepperdine University, Malibu, and a BA in political science from Trinity College, Hartford. He also was awarded the Thomas J. Watson Traveling Fellowship to study new town planning in Europe and India after college.

He is currently a full member of the Urban Land Institute and has been a full member of NAIOP and the Council on Urban and Economic Development. Interested in regional planning issues, Lawrence was a gubernatorial appointment to the Boston Metropolitan Area Planning Council.

Dan Slone

Richmond, Virginia

Slone represents developers and communities in overcoming the land use and environmental permitting impediments to small and large-scale projects such as new towns, utilities, and industrial facilities. He provides a wide range of services for developers of new urban and sustainable projects with a related focus on the convergence of communication, power, and essential services. He has assisted clients in dealing with wetland permitting and enforcement for more than two decades. Slone also works with a wide range of green product manufacturers. His practice area includes environmental solutions, land use, energy and utilities, and sustainability.

Slone has a JD cum laude from the University of Michigan Law School, Ann Arbor, and was an editor with *Journal of Law Reform*. He has a BA summa cum laude in philosophy and political science from Birmingham Southern College, Birmingham, Alabama. Among the many honors he has received are "Best Lawyers in America," Woodward/White, Inc., 2006–2011; named to Lawdragon 3,000 Leading Lawyers in America List, 2009–2011; named one of America's "Leading Lawyers," Environmental Law, Chambers USA, 2004–2010; named a Virginia "Super Lawyer," Law and Politics, 2005–2011; recipient, Henry David Thoreau Environmental Conservator, Better Housing Coalition 2010 Groundbreaker Award; recipient, Special Recognition for Service Award, Virginia Sustainable Building Network, 2006; recipient, Leadership Award, James River Green Building Council, 2005; Phi Beta Kappa, Omicron Delta Kappa, Institute of Green Professionals, Honorary Fellow.

He is a full member of the Urban Land Institute and is a member of its Sustainability Council.