

AN ADVISORY SERVICES PANEL REPORT

# Pasco County Florida



**Urban Land  
Institute**

# Pasco County Florida

## Planning and Organizing for Successful Economic Development

April 20-25, 2008  
An Advisory Services Panel Report

ULI—the Urban Land Institute  
1025 Thomas Jefferson Street, N.W.  
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Washington, D.C. 20007-5201

# About ULI—the Urban Land Institute

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**T**he 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 40,000 members worldwide, representing the entire spectrum of the land use and development disciplines. Professionals represented include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students, and librarians. 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.

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# About ULI Advisory Services

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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, brownfields 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.

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# Acknowledgments

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# Contents

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ULI Panel and Project Staff	6
Foreword: The Panel’s Assignment	7
Market Potential	11
The Future: Vision, Mission, and Challenges	16
Getting There from Here	33
Conclusion	40
About the Panel	41

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# Foreword: The Panel's Assignment

**P**asco County was founded in June 2, 1887, when Hernando County was divided into three counties: Citrus to the north; Hernando and Pasco to the south. It comprises approximately 868 square miles, with land constituting 745 square miles, and water constituting the remaining 123 square miles. It is bounded to the north by Hernando County, the northeast by Sumter, the southeast by Polk, the south by Hillsborough, and the southwest by Pinellas. Its western border is the Gulf of Mexico.

## Study Area

Pasco County is part of the Tampa Bay Metropolitan Statistical Area (MSA). The MSA consists of a four-county area, Hernando, Pasco, Pinellas, and Hillsborough, with a population of approximately 2.5 million. The MSA is the second largest in the Southeast and the 21st largest in the country. Forbes Magazine proclaimed the MSA the 15th top spot for business in the country. In the next 20 years, it is projected to undergo tremendous employment growth resulting in it becoming the tenth largest area for employment growth in the country. The area is projected to be one of the ten best areas in the country to find a job in the next 25 years. Within the MSA, the Port of Tampa has become one of the largest ports in the United States.

Pasco comprises six cities and unincorporated Pasco County, which makes up about 90 percent of the county. Dade City, the county seat, is located in the eastern part of the county and 6,856 people reside there. It was established in 1889, and people think of Dade City as “Old Florida” because of the nature of its physical appearance, as well as the lively spirit of its residents. San Antonio, which is just to the south and east of Dade City has a population of 948. It was established in the late 1800s as a Catholic colony. Today, San Antonio still retains its hometown feel. Saint Leo,



Location map.



Regional map.

The Pasco County Courthouse in Dade City is the county's iconic structure.



which is east of San Antonio, has a population of 1,250. It is home to Lake Jovita as well as Saint Leo University and the Saint Leo Benedictine Monastery. The city of Zephyrhills, the source of Zephyrhills Spring Water Company, is located in the southeast portion of the county and has a population of 12,579.

New Port Richey has a population of 16,645, making it the largest city in the county. It is located on the Gulf of Mexico and was founded in 1915. Port Richey, just to the north of New Port Richey, is also located on the Gulf of Mexico and has a population of 3,205.

### Current Development Issues

Like other jurisdictions in the Tampa area, Pasco is experiencing growing pains as it converts from a rural county known for ranches and orange groves into a county that will be competitive in the new global economy. In 1980, the population of Pasco was approximately 190,000. In 2000, the population had grown to some 345,000 residents and by 2006, that number soared to 450,000. Part

of this increase was fueled by the relatively inexpensive housing in Pasco. Another reason was the 2001 opening of the Suncoast Parkway. This highway provides an easy linkage from Tampa International Airport into Pasco County, thereby cutting the commuting time from Tampa from over 60 minutes to less than 30. Building permits followed the sharp increase in residents, moving from 3,210 permits in 2000 to an all time high of 8,544 permits in 2005. Even with the general malaise in the economy, Pasco still had 5,573 permits in 2006. Since 2007, however, permits have virtually stalled.

According to the Tampa Bay Partnership, a large problem facing Pasco is the fact that approximately 46 percent of its workforce commutes out of Pasco to go to work. This puts Pasco at a competitive disadvantage. There is an overburden on their roads, and Pasco is losing out on all of the secondary business that the employers throw off. In identifying the problem, Pasco has determined that it wants to place itself in a position to attract new business that will create high paying jobs in desirable fields. By doing this, Pasco will be able



Along the Route 19 corridor in the Port Richey and New Port Richey area, a substantial housing market developed in the post-World War II era. While most of these neighborhoods consist of solid and well-built single-family homes, some areas have begun to deteriorate as the homeowners transition from older retirees to younger families and minorities. This area still represents the bulk of the county's existing population.



to reposition the tax burden from the residential sector and redistribute it to business use.

### The Panel's Assignment

ULI was invited to Pasco County by the Pasco County Board of County Commissioners and the Pasco Economic Development Council (PEDC) and was asked to help identify the concerns the county faces from the recent period of high growth. ULI was asked to help Pasco determine what industries to target in order to create employment opportunities that will add value to the county. The county also asked the panel to assist in analyzing the structure of its land development code in order to define and address desirable market-based housing and commercial development strategies over the next decade.

The sponsor additionally asked ULI to suggest alternative organizational structures and processes that would make the development process more efficient, resulting in the county's ability to attract and retain desired business and economic development opportunities. Further, the sponsor

asked the panel to address the county's infrastructure and the challenges that are inherent in a county changing its nature from rural to urban. Lastly, the panel was tasked with determining how to maintain the high quality of life that Pasco residents desire, while at the same time allowing for and promoting sustainable and responsible growth.

### Summary of Recommendations

The panel's recommendations fall into two broad areas: 1) economic development and land use and 2) county organization. The panel believes that the successful and appropriate execution of the first is dependent on the implementation of the second.

#### Economic Development and Land Use

The residents and businesses already in the county must realize that growth, in the form of housing and employment, is coming to Pasco County. The county needs to establish a vision for specific areas that will allow it to grow in a beneficial and sustainable manner. In general, the county should be divided into five subareas, each with its own

Panel member Charles Long converses with County Administrator John Gallagher during the panel's bus tour.



specific vision, mission, and associated strategies to meet the overall goals of the county. In conjunction with structural reformation of the development and permitting process, the county needs to appropriately revise, adopt, and use its comprehensive plan. This revision should focus on infrastructure improvements (roads, water, sewer, electric, and storm water management) only in specific growth nodes. Pasco must then stick to its comprehensive plan.

#### **Organizational Structure**

Implementing the following changes to the county's organizational structure will contribute to the success of its future growth:

- Incorporate the panel's land use and economic suggestions into the comprehensive plan;

- Reconstitute the development services function into a planning department;
- Reorganize the development review process to make it predictable and timely, as well as effective in implementing the long-term land use and economic vision for the county;
- Allow the comprehensive plan to act as the primary document that articulates the county's long-term vision and organize the planning department around that long-term vision;
- Curtail the use of variances and exceptions in approving land use amendments, zoning approvals, and building permits;
- Support a departmental culture that celebrates innovation, embraces best practices, and focuses on customer service; and
- Delegate routine decision making to staff for projects that have been appropriately entitled and are consistent with applicable development standards without requiring such proposals to comply with additional, staff-generated, discretionary requirements not dictated by the county's code.

# Market Potential

Understanding vital socioeconomic trends that are affecting Pasco County can help planners and economic policy makers identify the potential and pressure for future land uses and business development opportunities. Successful urban planning, land use and development policy can best be described as public action that generates a desirable, widespread, and sustainable private market reaction. It should be noted that the following market analysis represents baseline projections of future growth that Pasco County can take steps to improve or impede.

Pasco County is an integral part of the Tampa MSA and until the last 18 months this region

has experienced some of the most substantial growth in the United States. After a period of destabilization, this expansion is likely to continue, through future decades.

As recently as 1980, Pasco County had just 193,640 people, or 12 percent of the population of metropolitan Tampa. As of 2008, Pasco County has 449,500 people, or 16 percent of Tampa’s population, and in recent years has been capturing almost 25 percent of the region’s population growth. It is projected that Pasco County, over the next two decades, will grow annually by 12,900 people in 5,600 households and this will be complemented by 24,600 seasonal or second homes. The following sections discuss these economic trends by land use.

**Figure 1  
Tampa MSA Demographics**

	1980	2008	2028	Average Annual Change	
				1980–2008	2008–2028
Population	1,613,600	2,828,070	3,829,670	43,030	50,580
Employment	718,900	1,649,900	2,001,200	33,250	35,130
Households	656,550	1,192,260	1,639,460	19,130	22,360
Second Homes	50,350	61,970	70,600	415	430

Source: THK Associates.

**Figure 2  
Pasco County Demographics**

	1980	2008	2028	Average Annual Change	
				1980–2008	2008–2028
Population	193,640	449,490	707,890	9,140	12,920
Households	81,350	194,050	306,850	4,030	5,640
Second Homes	10,900	17,430	24,600	230	360

Source: THK Associates.

**Figure 3  
Pasco County Office Demand**

Market Region	Annual Capture Rate (percent)	Average Annual Demand (sq. ft.)	Demand Over 20 Years		
			Square Feet	Acres	Jobs
Coastal	10	45,000	900,000	100	4,000
Inland West	10	45,000	900,000	100	4,000
Central	30	135,000	2,700,000	300	12,000
East	5	22,500	450,000	50	2,000
South	45	202,500	4,050,000	450	18,000
Total	100	450,000	9,000,000	1,000	40,000

Source: THK Associates.

**Figure 4  
Pasco County Industrial Demand**

Market Region	Annual Capture Rate (percent)	Average Annual Demand (sq. ft.)	Demand Over 20 Years		
			Square Feet	Acres	Jobs
Coastal	5	36,000	720,000	80	1,600
Inland West	5	36,000	720,000	100	1,600
Central	20	144,000	2,880,000	320	6,400
East	35	252,000	5,040,000	560	11,200
South	35	252,000	5,040,000	560	11,200
Total	100	720,000	14,400,000	1,600	32,000

Source: THK Associates.

## Office

Today, metropolitan Tampa has almost 62 million square feet of office space of which 11.5 percent is vacant. There is currently a ratio of 20 square feet of office space per capita. The Tampa MSA is projected to grow by 35,130 new jobs per year with 57 percent housed in office space. This area will need to add 4.3 million square feet of office space annually. Today, the northern outlying area, which includes Pasco County, has an office space

inventory of approximately 600,000 square feet operating at an 11.5 percent vacancy rate.

Based upon Pasco County's location and projected growth, it is estimated that over the next two decades it will experience an annual demand for 450,000 square feet of office space on 50 acres. Over the next 20 years, approximately 1,000 acres will urbanize for nine million square feet of office space which will employ almost 40,000 people. It should be noted that a majority of this office space

**Figure 5  
Pasco County Retail Demand**

Market Region	Annual Capture Rate (percent)	Average Annual Demand (sq. ft.)	Demand Over 20 Years		
			Square Feet	Acres	Jobs
Coastal	10	45,000	900,000	100	1,800
Inland West	10	45,000	900,000	100	1,800
Central	30	135,000	2,700,000	300	5,400
East	10	45,000	900,000	100	1,800
South	40	180,000	3,600,000	400	7,200
Total	100	450,000	9,000,000	1,000	18,000

Source: THK Associates.

demand will be from firms that employ less than ten people with a significant segment of the demand related to the medical and professional services industries. The panel estimates that this demand for office space should be distributed as shown in Figure 3.

### Industrial

Metropolitan Tampa has in excess of 236 million square feet of industrial space operating at 6 percent vacancy and over 88 percent is warehouse and distribution space. This current inventory represents approximately 80 square feet per capita. Almost 16 percent of Tampa’s projected employment growth will be housed in industrial space, and there will be an annual demand for 2.3 million square feet of industrial space.

Today, Pasco County has 6.1 million square feet of industrial space operating at a 5.9 percent vacancy rate. It is estimated that over the next two decades, Pasco will experience an annual demand for 720,000 square feet of industrial space on 80 acres. Over the next 20 years, approximately 1,600 acres will urbanize to accommodate 14.4 million square feet of industrial space employing 32,000 people. Over 85 percent of this industrial demand will be from smaller firms employing less than ten people. This demand will be regionally distributed as shown in Figure 4.

### Retail

Metropolitan Tampa has more than 128.7 million square feet of retail space operating at a 94.5 percent occupancy rate. This represents approximately 40 square feet per capita. Pasco County has 12.5 million square feet of retail space operating at a 92.6 percent occupancy rate or 26 square feet per capita.

It is estimated that over the next two decades Pasco County will experience an annual demand for 450,000 square feet of retail space on 50 acres. Over the next 20 years, approximately 1,000 acres will urbanize for 9 million square feet of retail space that will employ 18,000 people. This demand should be regionally distributed as shown in Figure 5.

### Hotel

Pasco County today has approximately 3,000 hotel rooms that operate at an annual occupancy of 65 percent. Tourist dollars spent in the county have been growing annually by approximately 4.5 percent.

It is estimated that Pasco County will need approximately 3,500 rooms added over the next two decades and approximately 1,000 rooms should be offered in the coastal resort environment. In total, this hotel demand will require approximately 100

**Figure 6  
Pasco County Hotel Demand**

Region	Rooms	Demand Over 20 Years	
		Acres	Jobs
Coastal	1,000	30	1,000
Inland West	400	10	400
Central	800	25	800
East	500	10	500
South	800	25	800
<b>Total</b>	<b>3,500</b>	<b>100</b>	<b>3,500</b>

Source: THK Associates.

acres and will employ 3,500 people. Their regional distribution suggested by the panel for Pasco County is as shown in Figure 6.

## Residential

Tampa's residential markets have been very dynamic. The area has averaged 12,700 single family units and 7,000 multifamily units per year since 1980. During the last ten years, the metropolitan Tampa area has averaged 15,400 single family units and 6,000 multifamily units. However, in 2007 housing production dropped off to just 7,300 single family units and 4,000 multifamily units.

Since 1980, Pasco County has averaged 3,300 new single family units and 750 multifamily units. In the last ten years in Pasco, single family units averaged 4,700 units and 900 multifamily units. This

**Figure 7  
Tampa and Pasco County Residential Demand by Type**

Unit Type	Demand Over 20 Years	
	Tampa	Pasco County
Single Family	18,500	5,400
Townhouse/Condominium	3,300	500
Rental Apartment	3,800	600
<b>Total</b>	<b>25,600</b>	<b>6,500</b>

Source: THK Associates.

represents the capture of 26 percent of the housing starts in the entire Tampa region.

In 2007, Pasco County housing production declined to just 2,200 single family units and 600 multifamily units. Over the next two decades, the Tampa MSA will average an annual demand for almost 25,600 units and it is estimated that Pasco County will enjoy an annual demand for 6,500 units. This residential demand by type is shown in Figure 7.

Pasco County's residential demand will require approximately 1,900 acres. Over the next 20 years, approximately 36,000 acres will be needed for single family homes, 1,300 acres for townhomes and condominiums, and 800 acres for rental apartments. In all, almost 260,000 new people will be housed in these units. The panel's estimated residential demand distribution by region is shown in Figure 8.

**Figure 8  
Pasco County Residential Demand by Region**

Market Region	Annual Capture Rate (percent)	Average Annual Demand (sq. ft.)	Units	Demand Over 20 Years Acres	Population
<b>Coastal</b>					17,400
Single Family	5	270	5,400	1,800	
Townhouse/Condominium	15	75	1,500	195	
Rental Apartment	15	90	1,800	120	
Subtotal		435	8,700	2,115	
<b>Inland West</b>					17,400
Single Family	5	270	5,400	1,800	
Townhouse/Condominium	15	75	1,500	195	
Rental Apartment	15	90	1,800	120	
Subtotal		435	8,700	2,115	
<b>Central</b>					75,800
Single Family	30	1,629	32,400	10,800	
Townhouse/Condominium	25	125	2,500	325	
Rental Apartment	25	150	3,000	200	
Subtotal		1,904	37,900	11,325	
<b>East</b>					23,800
Single Family	10	540	10,800	3,600	
Townhouse/Condominium	5	25	500	65	
Rental Apartment	5	30	600	40	
Subtotal		595	11,900	3,705	
<b>South</b>					125,600
Single Family	50	2,700	54,000	18,000	
Townhouse/Condominium	40	200	4,000	520	
Rental Apartment	40	240	4,800	320	
Subtotal		3,140	62,800	18,840	
<b>Total Unit Type</b>					
Single Family		5,409	108,000	36,000	
Townhouse/Condominium		500	10,000	1,300	
Rental Apartment		600	12,000	800	
<b>Total</b>		<b>6,509</b>	<b>130,000</b>	<b>38,100</b>	<b>260,000</b>

Source: THK Associates.

# The Future: Vision, Mission, and Challenges

**P**asco County needs to address many of the same challenges that communities across the country are facing today. Growth in the Tampa Region will have a significant impact on Pasco County. The county is strategically located and is becoming a highly desirable location for new residents and businesses. The natural northerly progression of growth out from Tampa will place enormous demands on the county for services and infrastructure. Decisions made today about the approach to growth and a vision for that growth will determine the future character and quality of development in Pasco County.

A clear vision for the future development, character, and quality of Pasco County can be the initiating force for sound planning and decisions on development form, quality, and sustainability. The panel was asked, “How can Pasco County compete in a global economy?” The answer lies in how the county is positioned as a competitive location of choice within the Tampa Region. The panel suggests that the county set its sights on being a premier location for new business and quality job creation.

The broader vision for Pasco County, however, could be to become a premier location where:

- People choose to live;
- Businesses decide to locate; and
- Natural resources are assets to be conserved and serve as quality of life amenities.

The question before the county is what are the key opportunities to fulfill these expectations? Also, what are the significant hurdles to overcome in seeking these opportunities?

The panel has been asked to focus on a specific mission. This charge is to recommend more effective and efficient delivery of services to the business community. Accomplishing this mission requires an understanding of existing land use problems and opportunities by major market areas within the county. The intention of the panel is to recommend specific actions that will create the necessary public role in establishing the platform upon which the vision can become reality.

The coastal portions of the county are primarily mangrove and wetland areas as opposed to sand beaches. Existing high-quality residential development takes advantage of numerous canals and waterways with access to the Gulf of Mexico.



A significant theme throughout the panel's interviews was the need for improvement in the planning and regulatory system. This includes organizational structure, codes and standards, decision processes, and customer service. Creating a more predictable, fair, and reasonable planning and regulatory system requires prompt and aggressive attention. Organizational structure and system improvements, or lack thereof, will either positively or negatively impact the economic growth forecasts prepared by the panel.

It is also the panel's feeling that the following actions could improve current problem situations:

- Create a position charged as the key change agent to move restructuring to a successful conclusion;
- Create an education and skill development program for planning and regulatory staff that fills new expectations created by existing problems and changes ahead; and
- Initiate a bench-marking effort by examining the successes of a metropolitan edge county that has dealt with planning and regulatory challenges similar to Pasco County.

## Market Areas

Pasco County covers a large geographical area and has a very diverse character. The panel has

prepared its assessment and recommendations for five market areas. The five market areas were defined considering cohesive market areas, land use patterns, regional transportation frameworks, and natural resource features. These areas are the Coastal Area, Inland West Area, Central Area, South Area, and East Area. The panel believes this approach best recognizes the diversity and unique opportunities across the county.

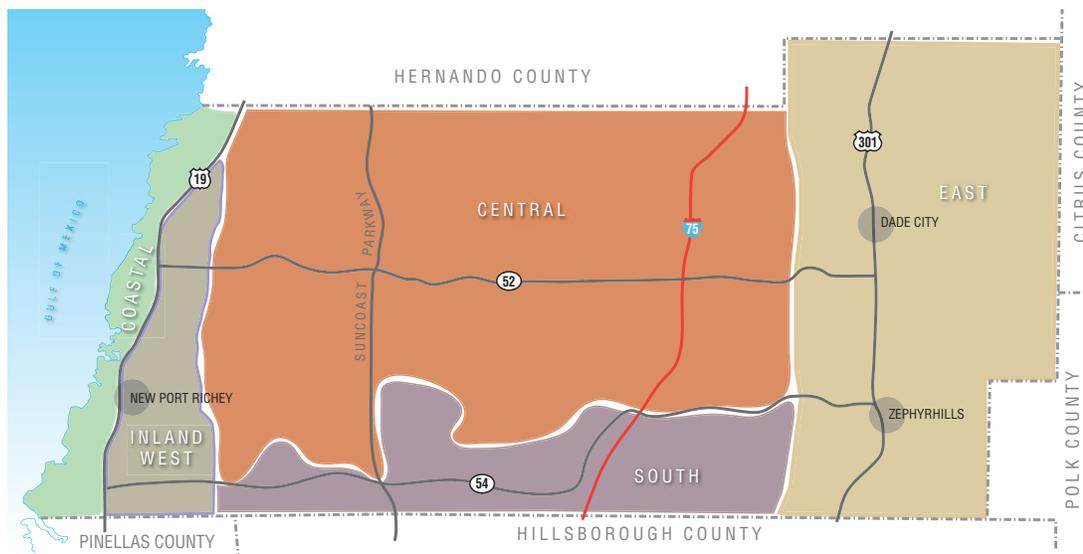
## Coastal Market Area

The Coastal Market Area lies between U.S. Highway 19 and the Gulf of Mexico. This area is a unique ecological area that includes portions of both Port Richey and New Port Richey. This area has a very distinctive character that offers opportunities for new vitality. Specific challenges, a vision, and mission provide the context for specific strategies.

## Coastal Market Area Challenges

There is no clear consensus on a mission for this area. It is a complex area grounded in an established development pattern. The panel highlighted the following specific problems.

**Land use and housing.** The U.S. Highway 19 corridor has an aging land use pattern with obsolete strip commercial centers. The housing pattern has been well established and includes high value homes taking advantage of water frontage



The five areas in this illustration were defined with consideration for cohesive market areas, land use patterns, regional transportation frameworks, and natural resource features.

together with a stock of affordable homes. There is a lack of quality commercial space. Tourism opportunities could be exploited to reinvent the area's identity and economic vitality. Existing development and parcel patterns constrain opportunities for redevelopment.

**Transportation.** There is limited connectivity into the Tampa Market. There are, however, connections into the Central Market Area with State Roads 54 and 52. These connections could be used to improve opportunities for revitalization and redevelopment as the Central Market Area grows. Highway 19 is a congested route that constrains the market potential of the area and severely limits the effectiveness of transit service.

**New markets.** The Port Richey and New Port Richey areas have as yet unrealized opportunities for revitalization, reinvention, and redevelopment. New residential, retail, and employment markets offer a strong opportunity. However, these markets need to be attracted and supported. Financial, land assembly, and marketing resources are inadequate to the task. The Coastal Market Area, with a focus on Port Richey, New Port Richey, and the ecological resources of the coast can be a strong foundation for branding this area.

**Medical.** Medical services can be a strong element within a broader reinvention strategy for this area. Medical technology employment offers an opportunity. Finally, services and facilities that serve an aging population will be needed.

#### Coastal Market Area Vision

In light of the Coastal Market Area features, the following vision elements are suggested:

- Seek to accommodate the potential household, population, jobs, and retail growth forecast over the next 20 years; and
- Emphasize the unique and high-quality dimension of development opportunities, including small-scale retail/restaurants; compact, well-designed development; places with a unique identity; and recreation and ecological features.

#### Coastal Market Area Mission

The principal goals for the Coastal Market Area are to:

- Reinvent the Coastal Market Area to make it a competitive and unique location with choices for living, working, shopping, doing business, educating, and having leisure time opportunities within an environmentally sound and safe setting;
- Revitalize sound, established locations to use the historic fabric as an asset; and
- Redevelop targeted opportunity areas that will expand opportunity to fulfill population, employment, and household forecasts.

Based on these goals, certain strategies have been identified that emphasize the unique qualities of the area. These have been divided into addressing neighborhood improvements, regional systems, and job enhancement.

#### Coastal Market Area Neighborhood Improvement Strategies

Neighborhood improvements include branding unique areas, creating community redevelopment area projects, advancing rehabilitation programs, and beautification.

**Brand unique areas.** The panel believes that certain areas within the Coastal Market Area have unique attributes that can be marketed to draw new users and eventually new development. While the panel spent little time in the Coastal Market Area, it is apparent that a potential branding component is around ecotourism, including the state parks, the marinas, the few beaches, and the river. All have potential under this theme. Distinct images of places give residents distinct experiences in their physical environment not otherwise appreciated. The proposed Sun West DRI, the reprocessing of the obsolete mine, is consistent with the image with a large lake- and water-oriented resort development.

**Community redevelopment area projects.** Some of the areas within the Coastal Market Area have become blighted and can be subject to specially-mandated programs called community redevelopment areas (CRAs) that address areas with special needs. Once an area has been designated, the tax levels of the existing developments are fixed. Then, once new development is approved, taxes are adjusted upwards to reflect the increased

assessed valuation. As this tax increment becomes predictable, the redevelopment agency is able to float bonds that are paid for from that income stream. This can finance improvements within the CRA that are consistent with the objectives of the program. These funds can be used to purchase existing dilapidated buildings and assemble land for larger-scale development. These projects can act to create a critical mass of new development in order to attract other projects, usually not requiring public funds.

There are two major areas in need of this approach. The first is the retail mall. This mall is currently the only significant retail in the county. However, given the age of the buildings and the two new regional malls under construction in the vicinity of I-75 and State Road 54, this facility and its surrounding retail will need to get a face lift, at a minimum, in order to stay competitive.

The second major area is the need for 1,000 acres of new housing of all types in the Coastal Market Area. People like living on the coast and close to the amenities inherent therein. Coupled with the enhancement of ecotourism, this part of the county could be much sought after. County funds would be one way of expediting all of these critical transitions.

**Rehabilitation programs.** Some jurisdictions provide information to homeowners and landlords on available public programs to offset costs related to rehabilitating properties that have deferred maintenance or landscaping issues. These can be federal, state, or local informational and funding sources. Some energy companies also provide funds for retrofitting older buildings to make them more energy efficient. The overall desire is to improve the appearance of properties within the coastal zone to make it more attractive to both residents and tourists alike.

**Beautification.** Other projects that are of relatively little expense related to street beautification can be undertaken with both public and private efforts. Sometimes local garden clubs will take the initiative to buy and plant hanging baskets or flower pots. Others, like scouting organizations, can engage in street clean-up or vacant lot debris removal. All of these relatively modest and

inexpensive efforts can add to the area's quality of life through improved aesthetics.

### Coastal Market Area Regional Infrastructure Systems Strategies

Regional infrastructure systems include the regional trail network, transportation upgrades, infrastructure finance, and community college programs.

**Regional trail network.** Many unique natural resources lie within the Coastal Market Area, but are currently not tied together in a regional trail network. The panel suggests creating links between the natural systems including the Pithlachascotee River, the Robert J. Strickland Memorial Park, the Werner-Boyce Salt Springs State Park, Anclote Key State Park, and similar natural areas. These interconnections create additional attractions for existing residents and tourists, as well as incentives for residents moving into new residential projects and would enhance the ecotourism branding.

**Transportation upgrades.** Located in the northwestern corner of the county, the medical complex needs improved access for residents in the Coastal and Inland West market areas. The roads along the U.S. Highway 19 corridor need to be improved, not just for convenience, but also for emergency services. In addition, expanded community college offerings could require new campus buildings.

**Infrastructure finance.** Most areas undergoing significant infrastructure development will need creative means of financing.

**Community college programs.** In that this area has a large percentage of the population and significant growth is expected, the community college role in this Coastal Market Area should be increased in terms of facilities and course offerings. Due to the number of hospital beds and medical related spin-offs, the community college should consider affiliating with a university to build a teaching hospital to make this a real medical cluster.

Strip development along Route 19 is in need of redevelopment and revitalization.



### Coastal Market Area Job Enhancement Strategies

Job enhancement in the Coastal Market Area should include PEDC actions. The PEDC has tended to concentrate on larger employment opportunities within the South and Central market areas. Since a large contingent of residents live in the Coastal Market Area, the panel believes that new employment opportunities should be accelerated near these existing residences along the U.S. Highway 19 corridor. Specifically, the medical services professions should be promoted and new lifestyle centers around or adjacent to the existing mall should be considered. These could be second and third story offices above ground-floor retail. This proximity of jobs and housing within the Coastal Market Area would translate into reduced vehicle miles traveled, less congested highways, reduced automobile-related air pollution, and increased options and quality of life for residents. Additionally, small businesses in this area may need Small Business Administration loans or other sources of capital. The PEDC could organize a structure for these small business expansion loans.

### Inland West Market Area

The Inland West Market Area lies east of U.S. Highway 19 and west of the boundary of the Central Market Area. This is an area with significant

affordable neighborhood housing which is worthy of conservation. Specific challenges, a vision, and a mission provide the context for specific strategies.

### Inland West Market Area Challenges

There is no clear consensus on a vision for this area. It is a composite of long-established neighborhoods, an aging development pattern, and inadequate services and facilities. Specific problems highlighted by the panel are discussed below.

**Land use and housing.** This area shares the same land use and housing issues associated with an aging area built for a bygone era. The housing stock requires attention in order to maintain it as a sound, affordable housing option that cannot be built in today's market place. The commercial strip uses are obsolete and compound the traffic congestion problem. There is a lack of quality commercial space to meet today's market conditions. There are limited opportunities for new employment sites and there is a need for open space and recreation facilities.

**Transportation.** The Inland West and Central market areas would benefit greatly by the completion of the Ridge Road Extension.

**New markets.** The population, employment, and housing forecasts for this area create an opportunity for significant restoration. There are rehabilitation and redevelopment possibilities that are currently hampered by financial constraints, land

assemblage difficulties, and lack of interest. There is a lack of identity for this area to attract investment and revitalization. Neighborhood identities could become the foundation of this area as a great place for family life, while adding more opportunity for diverse housing styles that respond to new market conditions.

**Medical.** Medical services can be a strong element within a broader reinvention strategy for this area. Medical technology employment offers an opportunity. Finally, services and facilities serving an aging population will be needed.

### Inland West Market Area Vision

In light of the Inland West Market Area features, the following vision elements are suggested:

- Seek to accommodate the potential household, population, employment, and retail growth forecast over the next 20 years;
- Emphasize the significant value of affordable housing neighborhoods and use infill and redevelopment opportunities to strengthen the vitality of these neighborhoods;
- Provide quality public services and facilities; and
- Expand housing stock choices and allow higher future densities that consider quality design and compatibility with surrounding housing.

### Inland West Market Area Mission

The principal mission elements for the Inland West Market Area are:

- Reinvent the Inland West Market Area to make it a competitive and unique location of choice for living, working, shopping, doing business, educating, and having leisure time opportunities within an environmentally sound and safe setting;
- Revitalize sound, established locations to protect the affordable neighborhood fabric as an asset; and
- Redevelop targeted areas that will expand opportunities to fulfill population, household, and employment forecasts.

Based on this mission, certain strategies have been identified that emphasize the unique qualities of the area. These have been divided into addressing certain land uses, regional connections, and employment programs.

### Inland West Market Area Land Use Strategies

Land use strategies discussed below include branding, integrated use nodes, transit viability, mall revitalization, and medical needs.

**Branding.** The panel's impression is that the Inland West Market Area is a series of neighborhoods that are distinct. They serve as housing options for those working in the area. In terms of retail, they are served by small neighborhood strip commercial development, mostly along U.S. Highway 19. As new housing is built in the area, opportunities to redevelop these strip commercial areas into lifestyle centers should materialize.

**Integrated retail, residential, and office nodes.** The U.S. Highway 19 corridor provides the spine for concentrating higher density residential, retail, and office uses. Traditional land use patterns have separated these uses into distinct areas, so that one had to drive to other areas to complete their daily activities. Traditional neighborhood design concepts, based on more highly-developed areas, have espoused multiple uses on the same site in order to enhance multiplicity of experiences in that one location and also reduce vehicle trips and vehicle miles traveled. Such uses require larger development areas, usually multiple acres, that would require land assembly and new development patterns. However, examples of this type of infill development abound in other parts of the country and should be looked at as models. Small parcel size and relatively modest house values make this type of assembly feasible.

**Sufficient density to create transit viability.** Consistent with this traditional neighborhood design approach, with residences close to retail and employment opportunities, the density will enhance the viability of transit through greater usage, increased fare revenues, and higher frequency of transit service. The U.S. Route 19 corridor is currently one of two corridors with transit in the county. It should be used as a model for exploiting that service, to enhance residents' quality of life,

housing choices, and redevelopment only possible within proximity to existing homes. The retail and service needs of the commuting population along this roadway should also be considered.

**Reinvent the mall.** While the existing mall is within the Coastal Market Area on the other side of U.S. Highway 19, the scale of this use provides the critical mass of destination trips to expand retail across U.S. Highway 19 to the Inland West Market Area. The panel suggests that the county consider the concepts outlined in ULI's *Ten Principles of Reinventing America's Suburban Strips*, by Michael Beyard and Michael Pawlukiewicz.

**Medical market.** Similar to the mall, the hospital in New Port Richey creates demand across U.S. Highway 19. Medical office needs around the hospital continue to grow with increasing medical specialization and outpatient treatment centers. Proximity to the hospital will enhance development and redevelopment opportunities for related businesses. While smaller individual buildings to address these demands may not be large employment generators in and of themselves, the sum of these cluster uses could be substantial. Medical industries, medical supplies, and even medical biotech research could be feasible in the longer term.

#### **Inland West Market Area Regional Infrastructure Systems Strategies**

Maximizing interconnections is a way to improve the overall neighborhood identity and improve the public's perception of the area as a convenient and safe place to visit. The panel suggests the following strategies to improve connections.

**Access to Coastal and Central Market Areas.** In that the Inland West Market Area is flanked by the Coastal and Central market areas, explicit connections need to be made in regional trail, conservation, water, and transportation systems. Many residents in the Inland West Market Area enjoy the coastal amenities, boating from the marinas, and ecotourism programs from the state parks and private open space locations.

**Preserve waterways and green connections.** Consistent with the above, these regional systems need to be preserved and enhanced.

**Brand unique areas.** Similar to the Coastal Market Area, the panel is not really in a position to understand the precise areas or uses that can be celebrated and woven into a distinct brand that can be used as a theme to expand on existing positives. Community groups could be engaged to solicit ideas and ways of positioning the area as distinct and memorable.

#### **Inland West Market Area Job Enhancement Strategies**

The Inland West Market Area is faced with many of the same economic development challenges as the Coastal Market Area. The job enhancement strategies for the Inland West Market Area should mirror the suggestions for the Coastal Market Area. Specifically, new employment opportunities should be accelerated near these existing residences along the Highway 19 Corridor. The medical services professions should be promoted and new lifestyle centers around, or adjacent to the existing mall should be considered. These could be second and third story offices above ground-floor retail. This proximity of jobs and housing within the Inland West Market Area would translate to reduced vehicle miles traveled, less congested highways, reduced automobile-related air pollution, and increased options and quality of life for residents. Additionally, small businesses in this area may need Small Business Administration loans or other sources of capital. The PEDC could organize a structure for these small business expansion loans.

#### **Central Market Area**

The Central Market Area is a vast, undeveloped area that is the heart of the county. Currently, the area is characterized by ecological areas, agricultural lands and a pastoral feel. It is served by two major north-south freeways, connecting it to Tampa and the Tampa International Airport. Bounded on the west and east sides by the older communities in the U.S. 19 and U.S. 301 corridors, this area has a unique opportunity to be distinctly different from other areas of the county.

#### **Central Market Area Challenges**

There is no clear articulated vision for this area and what it should become. It is perceived as the answer to everything without any corresponding

sense of place or character. There is great opportunity for development and the current framework for development and employment does not organize this potential around, nor protect, its greatest assets.

**Development pattern and mix.** While the vast openness of this market area and its excellent highway access are advantages, they also bring a high potential for an unsustainable development pattern of sprawling low-density development sprinkled helter-skelter over its huge area. Indicative of this are the large tracts of land that are already entitled, including several approved Developments of Regional Impact (DRI) and Master Planned Unit Developments (MPUD). The area appears to be over-entitled, especially with low-density single family housing. The panel felt that the entitlements currently on the books would result in an insufficient mix in the type, style, and pricing of future housing product.

**Economic development.** The area has several employment centers designated in the comprehensive plan, indicative of the desire to spread jobs throughout the Central Market Area and the county as a whole. The present deployment of economic development centers does not meld with the needs of employers to locate their businesses close to regional connections. The two natural corridors for these connections are where county roadways link into the Suncoast Parkway and U.S. 41. Additionally, there is no strategy for providing the infrastructure improvements that would enable the already identified employment centers to develop. Their locations are scattered and do not create nodes, or clusters, of retail or employment uses which support one another in locations that are attractive to employment uses.

**Transportation/transit.** Both roads and transit are inadequate to support the level of entitled development. The strategy for getting roadway improvements depends on developers and the payment of impact fees. This could result in patchy road improvements that inadequately connect commercial areas to major freeways and local markets.

**Water preservation and drainage.** The Central Market Area has a significant amount of land already

preserved for water recharge. Preserving all of these lands is not only vital for resource conservation but also for ensuring sustainability in the unique character of the Central Market Area. Providing for sustainability in water conservation and drainage practices for Pasco County and the region is not recognized.

**Utility services.** It is very expensive to provide utility services to any development in this area. Its mere size dictates that a regional system of water and sewer would need to run miles of costly lines through vast amounts of open space and water recharge areas, land that will never be developed.

**Financing of improvements.** There are large and significant infrastructure and community service improvements needed throughout this area. However, there is no realistic strategy for financing either the scope or the level of improvements required. The panel heard repeatedly that concurrency calculations are unpredictable at best. This, coupled with the sheer amount of infrastructure which is needed, makes this area difficult to develop.

### Central Market Area Vision

The panel's vision for the Central Market Area is one that capitalizes on its distinct ecological role, not just in the county, but in the north Tampa Bay region as a whole. This area should have an ecological development form that reinforces and replicates the unique environment of the water recharge zones that flow through the area. Employment, residential, and retail development all should be concentrated in clusters, or nodes, with a balance of mutually supportive uses. Visual quality and ecological relationships are enhanced with less-intense commercial development in business park settings within these nodes. The desired mix of developable sites varies in size and building types to accommodate small, medium, and larger employers appropriate in this area. These development nodes should be concentrated in identified development corridors that form a crown above, and are linked to, the emerging economic engine of the South Market Area and the established economic hub of Tampa.

Connerton is a high-quality residential planned community located in central Pasco County. The variety of residential unit types, combined with retail, office, and the new hospital, suggests a successful mixed-use formula that will work well in the central part of the county.



### Central Market Area Mission

In order to achieve this vision for the Central Market Area, the following approach needs to be fostered:

- Maximize transportation opportunities for large employment centers as well as for small, medium, and large employers;
- Attract a broad selection of small, medium, and large employers to employment centers that are located at identified nodes;
- Encourage master planned communities that have the density and community services, i.e., libraries, schools, parks, and cultural activities, to support a strong mix of uses within the community; and
- Promote higher density, more compact development to preserve additional open space and enhance existing ecological areas.

For the Central Market Area, the panel identified four general strategies: focus land use patterns, create destination centers, respect natural

systems and processes, and enlist the private sector in these goals.

### Central Market Area Land Use Strategies

To achieve this vision and mission for the Central Market Area, the panel suggests the following land use strategies.

**Consider urban service areas.** The county has processed and approved local plans and DRIs in this area well in excess of the market demand for these uses. In order to ensure cost-effective and sustainable development patterns, the county should consider the effective or actual adoption of urban service areas. The areas are so large and the costs of roads and related utilities extensions so costly, they must be done on an orderly and contiguous basis in the hopes of reducing or eliminating leap-frogging of development. This strategy should allocate limited county funds to the most cost-effective expenditures.

**Address entitlements: strategy for location.** Consistent with the idea of concentrating development in logical phases, projects located within these priority development areas should be placed at the top of the list to receive necessary public and private utilities.

**Cluster development to use existing arterial road system.** Given the enormous expense of arterial road construction, new developments around existing arterials should be given priority over other projects requiring new arterial construction with public funds. If the developer is able to put in the improvements at his own expense, then this is not an issue.

**Control utility expansion (timing).** For projects within urban service boundaries and in proximity to existing arterials, the county and other service districts should provide necessary water and sewer in a timely fashion.

**Focus infrastructure on land use priorities.** Projects with real or planned job potential should be provided with essential public services as a priority. This policy is consistent with the identification of new target industries, although the panel feels the definition of target sites and target industries planned for those sites is too broad,

providing not nearly the focus necessary for a successful economic development initiative.

**Consider another general aviation airport.** The county now has one general aviation airport in the southeast corner. The panel thinks that an additional general aviation airport could be added. It should include capacity for corporate jets to accommodate the Class A office executives.

### Central Market Area Destination Center Strategies

The following strategies are recommended to create destination centers in the Central Market Area.

**Concentrate higher density in two activity nodes.** The Central Market Area should concentrate development around two activity nodes: one at I-75 and State Road 52, the other between or adjacent to Ridge Road, State Road 52, Suncoast Parkway, and U.S. 41. In addition, due to the proximity of the Suncoast Parkway and U.S. 41, the corridor in between could be slated to higher density uses relative to the rest of the county. County funding should be focused on timely infrastructure improvements. The approved development projects reflect the potential to incorporate all these uses. Higher density uses may come in later phases as critical mass increases and land use economics improve.

**Capitalize on existing destination uses and resorts.** Saddlebrook Golf and Tennis Resort is one of the largest employers in the county. The proposed tennis stadium complex to be operated by Saddlebrook is an example of logical expansion of the large destination facilities. The panel suggests that this facility become a multifunction facility, rather than strictly a tennis facility. It could become a venue for concerts, performing arts, and similar cultural programs with the effect of bringing additional business into the county. A critical cluster for Pasco County appears to be sports tourism.

**Prioritize employment centers.** Currently the county and PEDC have taken steps to prioritize employment centers. The panel has not been able to clearly ascertain the extent of industrial sites that are available and ready to receive prospective employers. PEDC and county efforts should



Much of central, north central, and northeastern portions of Pasco County remains rural.

go further and have sites in different parts of the county ready with sewer and water already in the ground so that the prospect is only in need of building permits. All other discretionary permits should be taken care of. Then, combined with recommendations in other parts of this report regarding planning and approval processes, applicants will have some certainty on moving into the building.

#### Central Market Area Strategies to Respect Natural Systems and Processes

The panel suggests studying the development and conservation uses between U.S. 41 and I-75, and the Ridge Road extension and the north county boundary. This area is largely undeveloped at present; however, it will be under pressure for entitlements. Water resource and conservation issues, the level of entitlement in other parts of the county, and the high costs of servicing this area all suggest the county has time to review its development policies in this area. The panel suggests creating a study effort to elevate conservation as a priority here—as a unique regional asset with regional trail connections, water flows between adjacent areas and counties, ecological issues, agricultural continuity, ranchettes, and clustered housing.

#### Central Market Area Strategies to Include Property Owners

The following strategies are recommended to include private property owners in the Central Market Area development process.

**Compensation to land owners: differential land value.** The panel is aware that efforts to rationalize and focus the direction and location of development may reduce, or postpone, disposition of certain properties, out of synch with property owners' desires. Some mechanism needs to be put in place to reflect dislocations in property development timing, intensity, and ultimately, land value. The current state and county concurrency funding and impact fee assessments have the effect of creating excessive fees making projects infeasible. If the county moves to a trip generation fee based on an area-wide assessment process, all projects within the area may be assessed more or less equally, acting counter to the panel's recommendation to prioritize. The funding measures currently in place operate as a disincentive for development of out-parcels given the large number of improvements necessary for project approval. The suggestion here is to create positive incentives for landowners to willingly defer or even abandon development proposals in parcels not conforming to the new vision.

**Installation of infrastructure by developer.** If projects do conform to the new vision and priorities, the county policies should incentivize developers to install infrastructure necessary to support its development and be reimbursed by the county when funds are available.

**Induce owners of employment land to install infrastructure.** The panel heard numerous instances of small- and medium-sized companies wanting to locate to or expand within the county. The processes were so tedious, uncertain, and expensive that these companies relocated out of the county, transferred operations to other facilities (both in and out of the U.S.), or deferred hiring or expansion altogether. These dislocations run counter to the stated intention of the county and the PEDC. Given the evolving nature of the job market in Pasco County, these businesses need to be treated like larger employers in more mature markets. The PEDC should join with a cosponsor to build incubator space for new businesses.

## East Market Area

The East Market Area is characterized by two distinct cities. Dade City is the county seat and home to a thriving specialty antique retail and boutique restaurant market. Zephyrhills is home to one of the largest bottled water companies in Florida. This area retains a distinctly rural lifestyle and character with a rolling topography and agricultural lands. It is served by U.S. 301, which runs north-south through both the cities. Connections to I-75 are available via State Road 52 on the north end and State Road 54 on the south. A collection of local roads creates a very low-density development pattern radiating out from the two cities. The area is edged on the east by the Green Swamp, an important ecological water resource for the region that is owned and maintained by the Southwest Florida Water Management District.

### East Market Area Challenges

This area exemplifies the rural heritage and character that is Pasco County. While this is the perceived vision, it lacks the role this area plays in the economic growth and vitality of the county. This brings the perception that there is little anticipated change and that the status quo is what will continue to be. The strengths and potential



for the area are not well articulated. Mobile home development in the southern area has resulted in a perception of a poor housing stock. This negative perception has resulted in a lack of attention to the area's potential role in Pasco County's economic market.

**Development pattern and housing stock.** The rural character is captured in a very low intensity land use pattern for all types of uses. The panel felt that at least some of this area was subject to the problem of rural sprawl where a land use pattern of conventional subdivision is spread along a series of local rural roads. This, coupled with the perception of the quality of the housing stock, is a concern.

**Economic development.** There is a lack of employment centers in the East Market Area. There appears to be little or no recognition of the role the two cities could play in the development potential of this area. There appears to be no recognition of this area's contribution to the industrial sector of the Pasco economy. There may be a latent demand for medical facilities here since access to the two hospitals in the eastern part of the county is somewhat limited.

**Transportation.** Access to the area from the west county is limited to State Roads 52 and 54. The U.S. 301 corridor is improved, creating pressure to continue strip commercial development along

Dade City typifies a mid-20th century central Florida community. The numerous shops, antique stores, and restaurants are in sharp contrast to the suburbanization of other areas of Pasco County.

St. Leo (top) and the nearby town of San Antonio (bottom) represent the older rural settlements subjected to current development pressures. The pleasant small town atmosphere of San Antonio and the institutional focus of the university and the Benedictine Abbey in St. Leo set this area apart from the suburbanization taking place in south and central Pasco County.



the corridor between the two cities. Using the rail corridor that runs through both cities to support industrial development has not been reinforced by the county.

**Environmental sensitivity.** The East Market Area is bounded on the east by the environmentally sensitive and ecologically vital Green Swamp. Respect for this area and its role in water recharge and aquifer preservation is needed. Ensuring that new development is both environmentally sensitive and sustainable is not achievable if the existing development pattern is expanded throughout the East Market Area.

**Financing of improvements.** This is a low-intensity development area with little new development occurring. Infrastructure improvements may be more constrained by lack of funding through private development and impact fees than in other areas of the county.

### East Market Area Vision

The panel's vision for the East Market Area captures the lifestyle of a traditional community, focusing on using the character and identity of the two cities to distinguish development and emphasize a quality of life that values open space as a resource. This vision recognizes the low-density heritage and builds on it to preserve town-centered development. Key to this vision is to maintain the distinct character and edges of the two existing cities. Creating strip mall development along the U.S. 301 corridor is an option that is neither sustainable nor economically desirable. The East Market Area is, and will continue to be, home to the county's heavy industrial users. Grabbing that potential and nurturing it is the key to the future economic role of the East Market Area in the growth and development of the county. Its market potential also rests in maximizing the use of land that already has services and roads and, therefore, capacity for development.

### East Market Area Mission

In order to achieve this vision for the East Market Area, the following approach needs to be fostered:

- Preserve the opportunity for the small town traditional lifestyle. This means filling out the existing land use pattern and maximizing its potential to provide for some mix of industrial uses as well as work force housing.
- Preserve agricultural land. The small town heritage is inexorably linked to agricultural uses. To the extent that agricultural land can remain a productive contributor to the economic viability of the area, it should be preserved and enhanced.
- Emphasize town-centered development. Focusing development and urban services in the existing towns creates a sustainable development pattern and allows the opportunity for the clustering of a symbiotic employment basis.
- The U.S. 301 corridor must not become strip commercial development extending out from the two cities. Additional commercial development needs to remain clustered within the cities, not appendages to them.

- Proximity to the Green Swamp and open agricultural lands is an asset and a destination attraction for the East Market Area.

Since the East Market Area is more mature and established in development pattern, the panel recommends retaining the two incorporated area's identities and patterns, but encouraging expansion of recreational and employment opportunities while maintaining quality of housing stock.

### East Market Area Strategies to Preserve the Two Cities' Distinct Identities

The following strategies are recommended to preserve the identities of Dade City and Zephyrhills in the East Market Area development process.

**Urban service/development boundary.** Similar to the Central Market Area, the panel recommends focusing development within the incorporated areas or limiting expansion to areas that can be serviced with the minimum of additions to water and sewer extensions.

**Focus development on existing transportation corridors.** Similar to the Coastal Market Area, the East Market Area should capitalize on the single main north-south transportation spine. Development and redevelopment should be located at higher densities in apartments and townhouses. This would allow for consideration of transit options over time and more housing choice, increased proximity to retail and jobs with fewer trips and reduced vehicle miles traveled.

**Fill out established land use pattern.** While much of the area is already developed in the incorporated areas, some vacant or obsolete development could be razed and assembled for new, larger scale projects. These should be consistent with existing land use patterns and the needs of current residents. Job growth around the general aviation airport has particular potential to expand the local employment base. General aviation supply companies should be a focus for employment growth.

### East Market Area Strategies to Expand Existing Land Uses and Opportunities

The following strategies are recommended to expand the existing land uses and opportunities in the East Market Area development process.

**Focus economic development.** Heavy industrial uses should be channeled into this area. The area is already serviced by rail and the business incubator at the old juice plant provides some of the most available and competitively priced industrial space in the county. Given these locational advantages, the county and PEDC should focus recruitment efforts on these areas. It is consistent with the maturity of the employment markets and the type of expansions and relocations coming into this market.

**Improve recreational opportunities.** Proximity to the conservation area to the east and the national reputation for skydiving are only two of the most obvious attractions for recreation in this part of the county. The trail system into the conservation area should be optimized for the local residents; the exotic air sports can be promoted to appeal to an even broader audience.

**Promote general aviation and complementary uses.** The general aviation airport is the only one in the county and should be exploited.

**Improve housing stock to reflect the forecast profile.** Given the age and composition of the housing stock, some areas need code enforcement and rehabilitation. Many parts of the East Market Area provide workforce housing for other parts of the county. Given the high cost of new construction and the elimination of mobile home construction, this area provides necessary diversity to the county's housing stock.

## South Market Area

The South Market Area is immediately adjacent to Hillsborough County and is linked to the Tampa International Airport via the Suncoast Parkway and I-75. Promoted as only a 20-minute drive to the airport, this area represents the new Pasco: a family lifestyle in a high-quality environment with opportunities for a high-paying job within minutes of home. This area has the cache of being close to the culture and vibe of Tampa without suffering from the negatives associated with actually living and working in the more urban setting of Tampa itself.

New development in central and southern Pasco County needs to be clustered at nodes rather than spread out among competing land owners. Mixed-use buildings and planned communities that incorporate components of traditional neighborhood development should be a priority.



### South Market Area Challenges

There is no clear consensus on the vision or identity for the South Market Area. No brand has been established by which the area can distinguish itself and sell itself to the Tampa Bay office market. Proximity to the airport is noteworthy, but alone it is not enough to make the area remarkable. Its role as a gateway area is not fully realized.

**Development pattern and mix.** The panel felt that while this area was capitalizing on the growth pressures from the Tampa market to the south, the quality of the commercial product has been historically poor. This image still remains although new developments, such as Northpoint, are ratcheting up the level of quality and future image for commercial product. Efforts are being made to create employment nodes, but the image that must still be overcome is one of hodgepodge, low-quality commercial development along clogged transportation corridors. Residential areas are interspersed, creating opportunities to live close to potential future employment, but other quality of life amenities appear to be lacking, such as land for parks and recreation.

**Economic development.** Growth pressures from the south (Hillsborough County and the Tampa International Airport) are driving growth and economic development in this area. No clear economic development strategy exists in terms of markets

to target or serve, clustering of like-employment sectors, or identifying and strategically growing the area's competitive advantage. The market is responding on a speculative basis only. There is a high level of competition for economic development between the city of Tampa, Polk County, and Hernando County, fueled in part by the disparate fee structures and costs of development in each. The potential for medical facilities would appear to be viable in this area with its mix of new households and jobs.

**Transportation/transit.** This area is congested, which impacts its economic development potential. Both roads and transit are inadequate to support the level and quality of development. Existing freeways, the Suncoast Parkway and I-75, are at capacity during the morning and evening commutes south of the Pasco County line. Correcting this problem and the congestion that cripples State Road 54, the major east-west link, are major challenges for this area. The rail corridor that runs north-south on the western side of U.S. 41 in the South Market Area is not maximized for transit-oriented development.

**Environmental sensitivity.** Development does not appear to be environmentally sensitive or sustainable. The potential of linking into the ecology of the Central Market Area is not realized in the existing development pattern and may be lost to the emerging development pattern.

**Utility services.** A major electrical transmission line is proposed along the 54 corridor. This will impact not only future road improvements but also the visual quality and developability of lands adjacent to the corridor. Additionally, as in the other market areas, any needed utility extensions or expansions are very expensive.

**Financing of improvements.** The costs of required infrastructure improvements are viewed as a disincentive to development in this area. Impact fee and proportionate share requirements are creating the perception that it is more expensive to develop in Pasco County than in areas closer to the airport in Tampa.

### South Market Area Vision

The panel's vision for the South Market Area is one that capitalizes on its distinct and dual role as the gateway to and from Pasco County. This area can and will be the premier location for employers in Pasco County. Here, commercial office should be dense and vertical, supported by a good road system and a transit system. This area can sustain sophisticated residential development that has density and quality in design and materials. Its desirability as a close-in alternative to Tampa and as the quality place to live, work, and play is the paramount driver for development. This means that the South Market Area is also a retail hub and is home to higher-density mixed-use development.

### South Market Area Mission

In order to achieve this vision for the South Market Area, the following approach needs to be fostered:

- Maximize transportation opportunities for large, high density, vertical employment centers, i.e., transit-oriented development at future commuter rail corridors and their corresponding stations;
- Encourage mixed-use communities that are live/work;
- Attract a broad spectrum of employers and businesses, from small to large;
- Allow the synergies of business development to blossom by fostering secondary employers

to locate proximate to the larger employers they serve;

- Promote higher density, more compact development to add open space, parks, and recreational opportunities for both residents and workers;
- Encourage mixed-use nodes that take advantage of transit opportunities, both existing (bus) and future (commuter rail);
- Complete the upgrade of State Road 54 in order to foster east-west connectivity; and
- Encourage a minimum required density for office development in order to maximize the land available for office and other business development.

Strategies regarding the South Market Area relate to intensifying development, respecting natural systems, and recruiting large-scale employers.

### South Market Area Strategies to Intensify Development

The following strategies are recommended to intensify development opportunities in the South Market Area.

**Focus and encourage highest development at transit nodes.** While not yet at the point of offering transit, the area will be able to support the highest level of transit services due to the higher concentrations of office buildings. These nodes should attract mixed-use development, including attached for sale housing, apartments, neighborhood retail, and office buildings of various heights.

**Encourage vertical development.** These nodes of development along I-75 and Suncoast Parkway at state roads 52 and 54 should incorporate buildings with the largest numbers of floors—verticality, in the industry lingo—in the county. These uses bring more bodies to one area and allow a diversity and richness of experiences not feasible in other locations. It is the possibility for street activity well beyond office hours, cultural attractions, unique retail outlets, and nightlife activities.

**Cluster development in activity nodes.** Use existing arterial road systems similar to those in the Central Market Area recommendations. Development should be clustered around existing arterials to

reduce grid road development costs and use existing vehicle traffic to feed demand for new uses.

**Address entitlements.** Many of the DRIs in the South Market Area call for large numbers of dwelling units, and office and retail square footage. The panel supports these gross levels of entitlement, but at these locations it recommends concentrations of uses, rather than dispersion of uses. This approach could allow additional lands to be preserved, enhancing natural system processes and sustainability.

#### **South Market Area Strategies to Respect Natural Systems**

While water conservation and open space recharge strategies should be a hallmark for all development in the county, given the water drainage and supply issues, this area in particular must work with existing conditions and natural systems.

#### **South Market Area Strategies to Emphasize Larger Employers**

The following strategies are recommended to help emphasize larger employers in the South Market Area.

**Branding, design, identity, and quality.** This area should become the showpiece and gateway into Pasco County from the south. It needs to be branded as such and celebrated for its excellence

in design, quality, and sensitivity to the environment. This branding would then facilitate attracting higher end users into the Class A office buildings. It should not be solely dedicated to large employers, but to all types of employment opportunities.

**Recruiting businesses and jobs.** PEDC's expenditures here should have the greatest return on investment. Employers from Tampa looking to be closer to their workforce may be enticed to come to the county. Incentives and ease of permitting will be critical to selling these firms on the county's employment initiatives.

**Prioritize employment centers.** New sites need to be ready to go in order to respond to critical date move-in schedules from firms needing new space. As noted in other parts of this report, the county has taken many positive steps toward this end. It is here in the South Market Area that the efforts should come to fruition in the longer term, but not at the expense of the less dramatic steps in the shorter term, until these types of businesses see the benefits of coming to Pasco. All of the other efforts to focus infrastructure investment in and around these nodes should have a dramatic payoff for both the public and private sectors.

# Getting There from Here: Achieving the Vision

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**P**asco County's 30-year transformation from predominately rural to urban has imposed constant demands for addressing the pressure of growth. The county's evolution began in 1975 with the adoption of its first zoning ordinance and subsequently in 1989 with its first comprehensive plan. As growth pressures accelerated, the county reacted by passing a multitude of ordinances addressing issues of concern, resulting in a patchwork of complex, often conflicting, development regulations. An updated comprehensive plan adopted in 2006 remains only partially implemented awaiting the adoption and revision of 17 separate ordinances to implement the plan's policies. Moreover, the county's development review process is perceived as an unpredictable, inconsistent, untimely, and ineffective process to guide growth, foster public investment, or stimulate economic development.

Up until the late 1980s and early 1990s, the county dealt with development issues through simple codes, basic zoning, and a personal understanding of how things worked. Fast forward to 2008; 20 years of rapid urbanization and population growth, the character of the county has dramatically changed its organization from simple to complex, and from personal to computerized. Along the way, planning, regulatory, organizational, and management practices reacted to these intense pressures to deliver infrastructure to serve the hundreds of thousands of new residents.

The regulatory organization that has resulted has become focused on immediate problems at the expense of the long term. Under these circumstances, matching the organization to development management needs has been difficult and not afforded time or resources to incorporate high standards and predictability into the development process.

The panel heard a great deal about Pasco County's development review process. The general

consensus is that the process is broken and has failed to create a consistent vision of how to implement development. These circumstances compel a significant reassessment of the county's development management practices. As the recent development boom subsides, the perfect opportunity exists for the county to reorganize and focus on creating and implementing strategic and structural changes to its development management process based on best practices. Much of what is offered in this section is included in the new comprehensive plan, but is not yet able to be implemented through the existing development approval process. The panel applauds the county for its planning efforts and for recognizing that it needs to continue this work at all levels. Thus, the panel recommends implementing changes to address the following issues:

- By one count, the county has entitled over 572,000 dwelling units, more than four times the reasonably expected absorption of residential demand over the next 20 years. If this overentitlement were to actually occur, it would place unmanageable demands on the county's ability to serve growth and a bewildering sprawl of development throughout the county that will undermine quality of life and a sense of place.
- The development review process is so complex that neither the development services staff nor applicants know with any reasonable certainty all the conditions to be met for project approval.
- The number and complexity of existing development regulations and ordinances creates conflicts and inconsistent application of standards resulting in planning by variance, where a formal variance process must be used to resolve inconsistencies among different ordinances. This dynamic is compounded by the county's practice of making development also conform to ordinances under consideration for possible future adoption.

- The four components of the development services branch do not appear to work together.
- The development services branch has been overwhelmed processing applications and for the two years since adoption of the comprehensive plan had no time to restructure or draft its implementing ordinances.
- The staff of the development services branch is not conversant with current best practices, is not provided with consistent training and expressed low morale.
- The County Attorney's office is delegated to write development ordinances, but has previously done so without substantial input from the development services branch resulting in ordinances that are poorly understood or not relevant to the conditions faced by the branch. One example the panel was told about is a landscaping ordinance that stipulates plant species unsuited to local climate conditions.
- The process for determining concurrency proportional cost allocations to DRIs results in inconsistent, sometime unrealistic cost allocations to development rendering the approval process unpredictable, highly subjective, and taking many months, if not years, to complete the development review process.
- The process for reviewing DRI proposals appears to be disconnected from the county's comprehensive plan. Apparently, proposals for DRIs are accepted, processed, and finalized even though they may be inconsistent with the comprehensive plan. DRIs are generally conformed with the comprehensive plan by special amendment.
- The concurrency proportional cost allocation discourages redevelopment in older built out areas in need of revitalization.
- Implement high standards and predictability into the development review process;
- Strengthen the organizational capacity to manage the development process; and
- Apply more economic development and revitalization tools to the development process.

### Match the Development Management Process to the Vision

While the county has the best intentions, it has not established a clear, concise vision of what the county wants to be or how it sees its future. Ideas and concepts are not articulated as a unified vision or supported by a clear sense of mission and defined strategies that lead public and private decision making. As discussed, significant conflicts exist between many of the county's development plans, its implementation methodologies, and its regulatory actions. While the county administration has the best intentions, it has not yet formulated a clear, definable forum in which to create a mission and develop strategies to implement and nurture its adopted plans and best practices.

The panel found a disconnection between what is said in the comprehensive plan and how the administrative organization and processes implement the plan. To its credit, the county has gathered and built excellent information systems and technological capacity to support the comprehensive plan. However, it has yet to fully use those tools in decision making by focusing its development management principally on new development within the county's Central Market Area, all but ignoring over 50 percent of the population and hundreds of millions of dollars in existing infrastructure.

The panel identified five distinct market areas of the county and has articulated specific vision, mission, and strategy statements for each. The panel undertook this task to illustrate the manner in which visions could be matched with organizational structure, administrative tools, and staffing to build consensus and constituency for these distinct areas. Currently, plan implementation remains in a reactionary and reactive mode, not yet evolving into a forward-looking process capable of guiding

The panel has proposed a framework around which to articulate a vision, mission, and strategic implementation strategy to guide development that creates long-term quality of life. Four categories of action items are offered to translate the county's vision into tangible results:

- Match the development management process to the vision;

development, infrastructure, and growth synchronized with the comprehensive plan.

Although there is a strong desire by the county to provide significant economic growth, its current processes and procedures constrain opportunities by not providing clear, predictive, efficient, and timely development approvals. Organizationally, no business model exists to deliver development processes that enable the county to facilitate its goal of economic growth. As an example, a leading Pasco County developer lamented the expensive and complex process required to obtain simple development reviews and permits. In other counties this process would have taken only a few weeks or months, but in Pasco took many months, often years. Many public and private interviewees expressed the same sentiment that this complex, expensive, and time-consuming process has hindered the county's goal of economic development.

As a first step toward achieving its vision and correcting the shortcomings in its development review process, the county needs to incorporate and imbed its vision throughout the comprehensive plan and its development review and approval processes. The recently adopted comprehensive plan addresses many of the technical compliance issues for governing how development occurs, but fails to articulate a vision, mission, and implementation strategies. The panel suggests the county take the following steps:

- The Board of County Commissioners (BCC) should conduct a workshop to consider the panel's vision framework articulated earlier in this report. This workshop should be facilitated by an outside professional and result in BCC consensus for a vision and mission for each of the county's five market areas.
- The BCC, executive county staff, PEDC representatives, and other private sector representatives should visit a highly regarded urbanizing county such as Charlotte-Mecklenburg in North Carolina to gain perspective about best practices and strategies it could use to implement a long-term vision of development.
- The county must articulate, incorporate, and imbed a long-term vision for development into the comprehensive plan as its guiding principal and

imbed that principle throughout the county's budget and decision-making processes to insure its implementation.

- All development applications, including DRIs, must be required to be consistent with the comprehensive plan's vision as a prerequisite for approval. Inconsistent development proposals should not be allowed to proceed and comprehensive plan amendments should be strongly discouraged.
- BCC should articulate and imbed its vision as the core value of its entire planning, operating, and capital budgeting process as well as create a culture whose mission and strategy is to implement the vision.
- The county should develop close and strong working relationships and actively seek partnership with its towns and cities and with surrounding counties and governmental agencies to coordinate investment, regulation, and best practices.

Shepherding these changes will require staffing refocus. The panel recommends an executive level planner be designated key change agent to move these and the other recommendations to reality. This agent must involve the BCC, an executive level planner from the county, a representative of PEDC, and a member of the public at large.

### **Implement High Standards and Predictability into the Development Review Process**

Most quality developers prefer markets in which standards are high, and costs and timing are predictable. Establishing standards where new development competes on value, not cost, can quickly achieve high quality by insuring that standards and costs are clearly known before entering the development review process. To achieve the best quality development the county should implement the following action steps:

- The county should develop an Urban Service Delivery Plan designating growth areas in the Central, South, and Inland West market areas. This plan should identify areas in the Central

Market Area as reserve areas from which new development can be served beyond the current 20-year planning period. It should also address the substantial overentitlement of residential dwelling units that substantially exceeds the county's market and infrastructure capacity to serve the entitled units by limiting growth to designated growth areas. Part of this process will also be to designate the activity nodes recommended by the panel at Suncoast and Ridge Road and at I-75 and 52. As the panel previously described, the activity nodes would replace and supersede the employment center concept. The designation of growth areas and activity nodes is a vital contributor to creating high quality development that can feasibly be served with public facilities matching it to the county's ability to provide the infrastructure.

- The county should scrap its current development code and replace its current process governed by nearly 25 separate ordinances with a single clear code to accomplish the following objectives:
    - Reduce the number of zone districts from the current 27 to a more reasonable 10 to 15;
    - Minimize the number of ordinance-stipulated development conditions to use, parking, setback, and density;
    - Adopt specific and overall urban design guidelines that address architectural, landscaping, and site planning issues integrated, imbedded, and implemented throughout the new development ordinance; and
    - Streamline the development review process by delegating authority to the staff to approve routine development proposals and to make ministerial decisions.
  - The county should conduct long-range concurrency studies for each of the five market areas linked to a defined concurrency fee schedule specific to each market area. Long range studies should equalize concurrency costs throughout the market area and result in a schedule that levies fees by unit of development. These studies will substantially reduce the time for negotiating proportionate share costs on a case-
- by-case basis, thus increasing predictability and providing timely processing of development proposals.
- The county should redefine the scope and role of its current development review committee (DRC) so that it becomes solely an application review technical team (ARTT). The current public hearing functions of the DRC should be reassigned to the County Planning Commission. The newly constituted ARTT scope would focus on evaluating whether development applications are complete and meet conditions for development by right or require review by the planning commission and approval by the BCC for zoning or comprehensive plan changes. Membership on the ARTT would include midlevel managers who would be directly involved in functional coordination issues associated with development applications. The panel strongly suggests that the fire marshal be included on this team.
  - The county should conduct a work-flow analysis to speed and streamline the building permit process with the following performance objectives:
    - Plan check for any commercial building—no more than 45 days.
    - Plan check for multifamily residential—no more than 45 days.
    - Plan check for tenant improvements—no more than ten days.
    - As part of this streamlining, the panel suggests that the county implement a standard procedure for communicating within ten days of receipt of an application as to whether or not the application is complete.
  - Routinely execute agreements with major developments that provide long-term predictability of development conditions, including fees.
  - The reorganized development services branch should create a practice of assigning a staff member as case planner to serve as a single point of responsibility to shepherd a development application through the approval process.

- Initiate the drafting of all development-related ordinances in the development services branch, not the County Attorney's office. This effort should involve an outside expert to assist in drafting a code that reflects best practices. The County Attorney should only be called on to assist, and to approve as to form.
- The panel examined the issue of high development fees and development exactions and discussed whether they retard quality development. The panel concluded that high development fees or costly development conditions, per se, are not a problem if they are predictable and connected to valid capital and community needs and time frame. The BCC should review all development fees and exactions annually to insure they are appropriate and are associated with projects that can be accomplished in a reasonable time frame. In addition, if fees or exactions are changed, the panel suggests that such change be phased in a predictable manner to allow the market to build those higher costs into its cost structure.
- Continue to use the new tools of information management and analysis to refine the reliability of data for development management. Improving data collection and reliability will significantly contribute to improvement of the county's development management process.
- Reconstitute the development services branch as a planning department with only two divisions: long range and current planning;
- The organization should engage in a succession planning process that insures institutional knowledge is retained and that there is an orderly transition with retiring senior managers;
- Increase staff training, professional development, and celebrate best practices;
- Provide clear authority to delegate routine decision making to staff for routine issues and for projects that meet development by right criteria;
- Create an organizational culture dedicated to best practices, tolerant of honest mistakes with rewards for initiative, innovation, and effectiveness; and
- Create a concerted, consistent effort to build trust, communication, and a sense of mission among the staff by positive example from the top down to all levels.

### **Strengthen the Organizational Capacity to Manage the Development Process**

Currently, the development services branch has five departments: development review services, engineering services, growth management (development of regional impact processing), road and bridge, and zoning/code enforcement. This structure, in the panel's view, has resulted in a bureaucratic maze that impedes communication among staff members and segments development review into functional categories without consideration of the whole.

The county needs to address significant shortcomings in planning staff capacity to more effectively manage the development review process. Specific actions recommended include:

### **Learn About and Apply More Tools**

The Florida Legislature has created a large number of organizational and financial tools for governments to use in solving their growth and development problems and in implementing their visions with a wide degree of latitude.

While the county relies on impact and proportional share fees to meet the infrastructure and service needs of newly developing areas, it did not use other available tools to facilitate redevelopment of existing urbanized areas. Community development corporations, community development districts, community redevelopment agencies, and special purpose districts are significant tools for change that can generate substantial funds to pay for redevelopment, traffic improvements, land assembly, urban design enhancements, amenities, parks and open space, and utility infrastructure.

Understanding the appropriateness and effectiveness of tools for change can yield immediate results that add value and implement the county's vision. The panel found Pasco County has availed

itself of these tools and is using them in various limited capacities, although not to their maximum capacities or at scales that are yet creating significant impacts. The panel came to understand that the county needed to more extensively and effectively use various tools to capture revenues and expand delivery capabilities. Using these and other powerful tools, especially at a time of legislatively mandated budget and service reductions, is essential if the county is to improve its quality of life and provide needed services and economic opportunities.

For example, the Local Option Gas Tax (LOGT) was approved by a majority vote of the County Commission initially at 2 cents per gallon in 1984. Subsequently it was increased to 4 cents per gallon and eventually to the maximum of 6 cents per gallon in 1987. This LOGT was never submitted to the voters for a referendum. In 1993, the Florida Legislature authorized a second LOGT for up to 5 cents per gallon. This LOGT is restricted to expenditures necessary to meet the capital improvement element of the comprehensive plan. It can only be adopted after a successful referendum of the voters or by a supermajority vote of the County Commission. This second LOGT has not been placed on a referendum. While the county's fiscal frugality is admirable, the panel suggests that the county consider the long term operations costs associated with a growing, urbanizing population and do its best to insure adequate funding for these costs.

One simple but highly effective tool in the box is regular, consistent communication, cooperation, and joint-ventures with other governments, agencies, and the private sector to combine and leverage multiparty resources to achieve mutually desired results, faster and at lower cost to each participant. The county should coordinate its activities more closely with its cities and with adjacent counties.

The current comprehensive plan calls for establishing a redevelopment project area around U.S. Highway 19 to assist with revitalization and renewal of that area. This task has remained unaddressed because the workload for processing development applications has been so overwhelming. The county needs to focus on effectively

maximizing the potential of all tools available to fully achieve its vision.

The county should establish in the near term two redevelopment project areas, one for the Coastal Market Area, to include the U.S. Highway 19 corridor, and the other for the Inland West Market Area. In the medium term, the county should consider a third project area for the East Market Area. These redevelopment areas should be enabled to:

- Engage in land assembly and incentive programs for employment generation;
- Focus on enhancing medical complex employment;
- Create commercial and residential rehabilitation programs focused on new standards for hurricane survivability;
- Renew, revitalize, and revision aging strip retail areas;
- Renew aging residential areas with infill of mixed use projects;
- Acquire right of way for transportation corridors;
- Provide social and community services needed for an aging and low income community;
- Enhance cultural opportunities serving the area;
- Redevelop project areas to include as large an area as practicable to create a large resource base focused on specific areas of opportunity so that resources can be targeted;
- Use community development districts and redevelopment project areas to spread the risks and costs of installing infrastructure and creating development-ready areas for employment centers across all market areas;
- Enhance the understanding of its staff and of the community in sustainable development practices and embed these practices into its development management policies; and
- Creatively use and deploy the totality of tools needed to implement its vision, including the eminent domain authority, which is a critical

tool to acquire right-of-way and other public facility real estate.

The panel noted that the ongoing effort of the PEDC could be enhanced and improved by greater focus on more relevant target markets such as medical and small businesses. The county will add over a quarter million people in the next 20 years, which will require new medical centers to locate in the Central and South market areas. The four medical centers in the Coastal Market Area will need to be renewed and expanded.

These centers are a significant source of high quality employment. In addition, the overwhelming majority of job creation in Pasco County over the next 20 years will be from businesses with less than ten employees. The panel believes greater focus on this market segment, perhaps at the expense of chasing large employers, will enhance job development.

# Conclusion

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**T**he panel has suggested two major actions on the part of the county and PEDC. First, in order to build a clear vision for the future development of the county, sound planning decisions must be made to influence the form, quality, and sustainability of development. The panel believes that a key to this planning approach is to recognize that the county consists of unmistakably different geographic areas and those areas must have visions, missions, and strategies that are tailored to each.

Second, the county must revise the way it does business as it relates to the planning and development approval process. The county must migrate from tedious, ad-hoc, and cumbersome to predictable, orderly, and consistent. The development services branch must be transformed into a planning department that focuses on long-term strategic decisions about growth. A consolidation of the land planning functions will remove bureaucratic silos and enhance communication. Near-term decision making should be oriented toward tactical actions that carry out the long-term strategic goals.

The organization should engage in a succession planning process, increase staff training and professional development, and celebrate best practices. There should be clear authority to delegate routine decision making to staff for routine issues and for projects that meet development by right criteria. Finally, a new consolidated development ordinance needs to be created and changes to that new document should be entertained only where absolutely necessary, with the planning department taking the lead and acting as the arbiter of those changes.

The Tampa region's demographic arrow is pointed squarely at Pasco County. The current downturn in the housing sector will rebound and the panel predicts strong growth over the next 20 years. As noted at the beginning of this document, successful urban planning, land use, and development policy can best be described as public action that generates a desirable, widespread, and sustainable private market reaction. It is the duty of the county and PEDC to be ready to act on this adage.

# About the Panel

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## Alex J. Rose

*Panel Chair  
El Segundo, California*

Rose serves as vice president, development for Continental Development Corporation in El Segundo, California. He is responsible for managing all development, acquisition, and construction activities for the suburban office/research and development park developer, whose holdings cover over five million square feet in Southern California's Los Angeles County South Bay market and in the City of San Francisco. Rose oversees acquisitions and new project development; planning and execution of all tenant improvement, core and shell renovation and new construction work; major facilities maintenance and upgrades; project budgeting and cost controls; internal project management; and architect, engineer, and contractor management.

Over the past 13 years, Rose has overseen the development and acquisition of over one million square feet of Class A office, medical, and retail space, the physical transformation of over one million square feet of single-tenant research and development facilities into multitenant office space, restaurants, retail, and entertainment uses. Rose's current projects include the repositioning and conversion of a 500,000 square foot office park to medical uses, redevelopment of a 108-acre chemical plant site into 850,000 square feet of promotional and lifestyle retail, and the redevelopment of obsolete retail property into medium-density residential over retail mixed-use, redevelopment of a pair of outdated commercial centers into infill residential/retail mixed-use projects, and numerous other commercial acquisition activities. Prior to assuming the development and construction responsibilities, Rose served as director of property management. He also has extensive experience in title insurance and is a licensed Califor-

nia attorney, with experience in general civil and bankruptcy litigation practices.

Rose received his MBA from the University of Southern California, his JD from Southwestern University School of Law and BA, Political Science from UCLA. He is a trustee of the Urban Land Institute, a member of ULI's national District Council Committee, Annual Fund Committee, Infrastructure Finance Advisory Group, Small Scale Development Council, and Los Angeles District Council Executive Committee. Rose is also a past chair of ULI's Commercial and Retail Development Council and a vice chair of its national Program Committee. Rose has chaired and served on numerous national ULI Advisory Services panel assignments focusing on downtown and transit corridor redevelopment and revitalization and office development issues and has participated in several ULI office sector workshops.

Rose has been a member of numerous other community, industry, legal, UCLA, and USC affiliated groups, including the National Building Museum, Los Angeles Conservancy, El Segundo Employer's Association (a business-community based organization focusing on community infrastructure improvements), Leadership Manhattan Beach, and New Schools Better Neighborhoods (a private and public citizen's advisory board which is researching and developing standards and methodologies for the development of over 100 new community-asset public schools in the Los Angeles metropolitan area).

## Daniel 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 30 years experience as an urban land economist. For the last 20 years as president and

director of economics and market research for THK Associates, he has conducted numerous residential, commercial, industrial, and golf course economic feasibility and market studies, socioeconomic impact assessments, and financial planning studies.

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, and his book *The Cost and Revenues of a Unique Golf Club* has furthered his reputation as one of the industry's leading authorities. Under his guidance, THK Associates completes more than 75 golf course feasibility studies and golf driving range market studies and appraisals each year.

### **Martin R. Cramton, Jr.**

*Charlotte, North Carolina*

Cramton has 40 years of regional, county, and municipal planning experience in Michigan, Oregon, and North Carolina communities. Responsibilities included management, land use, transportation, regulation, capital improvement programs, urban design, economic development, neighborhoods, and community consensus building. Before retirement in 2003, he was planning director in Charlotte for 24 years. Currently, he consults on private development projects.

Cramton began his career in Michigan, serving in a variety of regional and local planning positions including director for Saginaw County Metropolitan Planning. Next, he served as planning director for Washington and Multnomah counties (Portland, Oregon) where he played a key role in crafting comprehensive plans as well as rewriting and administering land use regulations for both counties. He also had a major role in creating growth boundaries for both counties and the Portland region. Cramton was the 1979 recipient of the Oregon Chapter of the American Planning Association's Award for significant contributions to local and regional planning.

Most recently, as Charlotte–Mecklenburg planning director, Cramton was instrumental in building a community consensus on an urban vision and growth management strategy. He was instrumental in creating a regional land use/transit plan that resulted in a light rail line opening in 2007. A plan for transit-supportive development was completed and it is a reality. In addition, he advanced many other successful planning initiatives. These included a new 2005 general development plan; a 2015 vision and goals plan; and a smart growth program linked to the city budget. Other initiatives he pushed forward included Charlotte center city plans; five district plans; 70 neighborhood plans; a 31-neighborhood reinvestment program; and new zoning, subdivision, and sign regulations implementing plan expectations.

Cramton served on the Center City Partners Board. He was a central member of the city of Charlotte's Executive Team and worked extensively with the Charlotte City Council; the Mecklenburg County Board of Commissioners; and the intergovernmental Charlotte–Mecklenburg Planning Commission. He maintained strong working relationships with city and county staff. Additionally, he has successful hands-on experience working with a wide array of advocacy groups including neighborhood, business, and development organizations.

Cramton's leadership, management, and consensus building skills made a significant contribution to the Charlotte community and region. He was the 2003 recipient of the North Carolina American Planning Association Award for significant

planning contributions over a sustained period of time. Cramton also received the 2008 ULI-Charlotte Legacy Award for positively influencing the community, land use, and the environment in the Charlotte region.

Cramton's educational background includes a bachelor of science degree in planning from Michigan State University and a master of science degree in political science from Portland State University.

## Tom Hester

*Tempe, Arizona*

Hester is a senior urban designer at Parsons Brinkerhoff Placemaking Group. Placemaking integrates land use and transportation to plan and design sustainable community development projects with a sense of place. He has earned a national reputation for his ability to help public and private sector clients strategically position development projects and improve their overall performance and viability. His strong leadership and management skills have helped diverse groups build consensus and attain project goals. Hester brings skills in zoning, design guidelines, public and private partnerships, real estate finance and development, community planning, and transportation planning and design to his projects. Prior to PB, he held senior positions at Canin Associates in Orlando, Civitas, Inc. in Denver Colorado, and EDAW in Australia.

Hester earned a bachelor of architecture from California State Polytechnic University in Pomona and a master of architecture in urban design from Harvard University's Graduate School of Design, where he earned top honors for leadership and academic studies. He has taught architecture, graphic design, and computer imaging at Cal Poly and Otis College of Art and Design, and has lectured on the integration of information technologies within architectural curricula. Hester is a member of the Urban Land Institute where he has participated in a number of forums and Advisory Services panels, as well as taught at their Real Estate School.

He has recently completed redevelopment plans for a 350-acre superfund site outside of Salt Lake

City; a rezoning and transit-oriented development plan in Denver; a Capitol District master plan in Cheyenne; a downtown master plan in Olathe, Kansas; and a riverfront redevelopment plan in Des Moines, Iowa.

## William C. Lawrence

*Jamestown, Rhode Island*

Lawrence brings more than 25 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. As principal, Cityscope, Inc., he engages in development projects for his own account and in providing contract services in project management and consulting to both public and private clients. Cityscope specializes in value creation for client assets, including strategic planning and assessment, asset positioning and management, and public and private financing.

Lawrence wrote the winning proposal and was designated coproject manager for a \$275 million multiblock commercial development between a new Amtrak station on the Northeast Rail Corridor and the T.F. Green Airport as a joint venture between the Bulfinch Companies, the city of Warwick, Rhode Island, and the state of Rhode Island. He has assisted a Boston community development corporation in planning a large commercial development on excess public lands. Prior to this assignment, Lawrence was the contract project manager to outsource the MBTA real estate group with annual revenues in excess of \$5 million.

Prior to starting Cityscope, as director of 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 the Kenneth Leventhal & Company (now E&Y Kenneth Leventhal Real Estate Consulting), a national CPA firm. Prior to that, he founded and for twelve years managed the William C. Lawrence Company, a market feasibility and economic development consulting

firm located in Pasadena, California, and for four years he managed environmental policy planning at two large West Coast new community developers: The Irvine Company and Mission Viejo.

Lawrence has a master's degree in city and regional planning from the Harvard Graduate School of Design, a master's degree in business administration from Pepperdine University, and a bachelor of arts degree 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 the National Association of Industrial and Office Parks and the Council on Urban and Economic Development. Interested in regional planning issues, Lawrence is a gubernatorial appointment to the Boston Metropolitan Area Planning Commission and a member of its executive committee.

### **Charles A. Long**

*Berkeley, California*

Long is a developer specializing in mixed-use infill projects, including acquisition, entitlement, consulting, and development. He has 31 years of diverse experience in local government and development with an emphasis on economic development, finance, and public-private partnerships. He served for eight years as city manager in Fairfield, California, a city with a national reputation as innovative and well managed.

Since 1996, he has worked as a consultant to public and private clients on development and management. 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, California. His assignments have been diverse, including writing redevelopment plans, working on development projects, conducting pro-forma analysis, conducting strategic planning, representing public agencies in negotiations, marketing development opportunities, assisting with organizational development, conducting capital and financial planning, implementing budget reform, analyzing base reuse, and promoting alternative energy

development. He has overseen over \$600 million of public financing in his career. His work on development is focused in California with an emphasis on public/private development and mixed-use infill.

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 teaching the Real Estate Development Process II and Decision Making for Development Professionals courses. He has worked on ten ULI Advisory Services panels, most recently chairing a panel in Boise, Idaho. He has taught at the School of Public Administration at Golden Gate University and has conducted courses on economic development and organizational change internationally.

Long has a bachelor of arts in economics from Brown University and a masters of public policy from the University of California, Berkeley. He served in the U.S. Army as an infantry platoon sergeant.

### **Michael J. Maxwell**

*Miami Shores, Florida*

Nationally recognized for achievements as a developer and workout specialist, Maxwell has spent over 30 years acquiring and developing nearly \$1 billion in real estate assets, primarily in Florida and the Caribbean.

He is managing partner of MAXWELL+Partners, LLC, Miami, Florida, offering both development and advisory services. The firm specializes in urban infill development and is noted for its innovative project solutions creating new market opportunities and products. The team has delivered more than 2 million square feet of mixed-use, office, retail, warehouse/distribution, resort hotel, residential, and specialty products. The firm provides consulting in market creation for urban redevelopment. As advisers, the firm's participation in workouts, restructures, asset management, construction completion, and disposition exceeds \$300 million. Expert witness services on asset evaluations, workout strategies, and dispute resolution are also offered.

As a developer and adviser, Maxwell is known for visioning niche markets, sensitive place making, green/sustainable strategies, and exceptional architecture that create high value added commercial and residential products. A trained architect and urban planner, he is a licensed real estate and mortgage broker, holds the American Institute of Certified Planners designation, has earned awards for preservation, industrial, and redevelopment projects and earned a bachelor of arts, University of Texas, and a master of planning, University of Virginia.

Maxwell's community/industry involvements include: adjunct professor of business, Nova Southeastern University MBA Real Estate Program; full member ULI; ULI Florida/Caribbean District Council Executive Committee; ULI Inner City Council; co-vice chair, 2008 ULI Fall Meeting; ULI Advisory Services panelist; Greater Miami Urban League; and founder of New Urban Development LLC, a not-for-profit affordable housing company.

## Mary Roberts

*Pinole, California*

Roberts is the community development director for the city of Pinole, California where she is responsible for all aspects of planning, zoning, and redevelopment. Pinole is a city of 20,000 located in the San Francisco Bay Area, on the shores of San Pablo Bay in West Contra Costa County. She has 25 years of experience in land use, transportation, housing, and economic development. Her background spans the public, private, and non-profit sectors. She has worked for large cities (Denver, Colorado), small towns (Aspen, Colorado) and re-

gional agencies (San Francisco Bay Area Rapid Transit District, BART).

Prior to Pinole, Roberts served as the as the director of community development for the city of Littleton, Colorado. A medium-sized suburb of Denver, Littleton is home to 47,000 people. As the executive director of the Aspen/Pitkin County Housing Authority, Roberts managed an inter-governmental agency charged with developing, managing, and setting policy for affordable housing. While at BART she led the organization's first strategic planning effort. This entailed examination of management as well as operational systems. She worked with the elected board and senior staff to identify core service values, create a vision for the agency's future, and establish implementation priorities.

Roberts also has experience working with advocacy groups and citizen involvement. While at the Bay Area Ridge Trail Council, a regional nonprofit group in the San Francisco area, she worked with local volunteers to achieve a regional trail system for an eight-county area. Educating volunteers, decision makers, property owners, and donors formed the basis of her work. As a consultant in the private sector she has produced comprehensive, special area, and neighborhood plans as well as environmental assessments for development projects.

Roberts holds a master's degree in urban planning from the University of Colorado at Denver, a master's degree in public administration from the John F. Kennedy School of Government at Harvard, and a bachelor's degree in social sciences from Illinois State University.



**ULI—the Urban Land Institute**

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