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Acknowledgments

Members of the Tampa Bay Regional Planning Council (TBRPC)

Members of TBRPC’s COVID-19 Recovery Task Force, including:
Commissioner Vanessa Baugh, Manatee, Chair
Commissioner Jack Mariano, Pasco, Vice Chair
Councilman Michael Fridovich, Gulfport
Councilman James Chambers, Temple Terrace
Councilman Dan Saracki, Oldsmar
Vice Mayor Carlos Diaz, Safety Harbor

Elected officials and staff from the participating CARES Act study local governments, including the cities of Zephyrhills, Largo and New Port Richey; and the counties of Manatee, Pinellas and Pasco.

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The Tampa Bay Regional Planning Council is an association of local governments from Citrus, Hernando, Hillsborough, Manatee, Pasco and Pinellas Counties.
Tampa Bay Economic Development District

The Tampa Bay Economic Development District (EDD) is the Economic Development Administration (EDA) designated district for the Tampa Bay region, comprising six counties (Citrus, Hernando, Hillsborough, Manatee, Pasco, and Pinellas, as well as all of the incorporated cities therein). Housed within the Tampa Bay Regional Planning Council (TBRPC), one of Florida’s ten regional planning councils, the EDD offers a variety of economic development assistance services to member agencies of the Council as well as other jurisdictions located within the District that are not Council members. Those services were provided via the Council’s Economic Analysis Program.

Tampa Bay EDD also prepares annual and five-year updates of the Comprehensive Economic Development Strategy (CEDS), a guidance document required of all economic development districts to support the economic development initiatives of Tampa Bay area partners. As part of the assistance the EDD offers to member governments, the EDD prepares Letters of Consistency to projects that fit CEDS criteria and may qualify for an EDA investment in economic development projects.

Tampa Bay Responds to COVID-19

In light of the widespread health and economic impacts of COVID-19, TBRPC formed a COVID-19 Recovery Task Force in August 2020 to help guide the region toward economic recovery. Chaired by Vanessa Baugh, County Commissioner from Manatee County, TBRPC staff prepared and submitted a grant application to EDA to provide supplemental technical assistance to local economic development partners under the Coronavirus Aid, Relief, and Economic Security Act of 2020 (CARES Act). Subsequently, EDA awarded the grant to TBRPC.

About the CARES Act Grant

This is the final report for the EDA CARES Act supplemental funding. TBRPC is grateful to the U.S. Department of Commerce for the partnership in supplying resources that allowed the Task Force to work with local governments throughout the Tampa Bay Region to assess the economic impacts of COVID-19 on their communities. Pursuant to grant conditions, TBRPC staffed an additional position with the Council, an Economic Development Planner.

Through several public call for projects, TBRPC initiated discussions with regional partners to identify local economic development projects that would benefit from TBRPC’s existing Economic Analysis Program. Using awarded CARES Act funds, staff has engaged in several large planning projects, all of which incorporate 3D visualization and economic impact analyses to expand the offerings of the Economic Analysis Program.
TBRPC Economic Analysis Program

Established in 1999, the Council’s Economic Analysis Program offers economic analysis assistance to member governments, non-profits, and the private sector, using REMI PI+ and IMPLAN, to support the Council’s analysis program. Since its establishment, the Economic Analysis Program has prepared hundreds of studies to help the Council’s clients understand the impacts of potential investment decisions as well as incentive support for local governments. With support from the EDA, those services are offered at low or no cost to local governments and on a sliding scale payment basis for non-profits and the private sector.

Unlike work in previous years, where most studies focused on quick turnaround impact reports, under CARES Act funding TBRPC decided to focus on the highest impact and in-depth analysis of recovery strategies for local governments. This expanded program required both clear project criteria and fit within TBRPC’s suite of skills.

Project Development Process

Due to staff and budget constraints and the strict two-year timeline for this grant, TBRPC devised a set of project selection criteria to ensure the most impact across the region. TBRPC then issued three calls for projects from all economic development partners in each of the Economic Development District’s six counties over the first 18 months of the grant.

TBRPC’s economic development assistance criteria were focused on providing high quality analysis to as many member governments as feasible within the grant timeframe. Accordingly, TBRPC issued a call to all EDD contacts for projects that could be accomplished within four months to six months, stipulating that the proposed projects be focused on economic recovery, using the Council’s economic analysis tools and visualization. Instead of charging member governments for economic analysis services, the staff time equivalent was charged to the CARES grant, based on the hourly rates set forth in TBRPC’s grant application. Projects were limited to relatively short time limits to ensure that projects were focused on the technical aspects of TBRPC assistance and not be susceptible to drawn-out and indeterminate projects that would have delayed other potential economic development assistance.

While TBRPC contacted all local governments and economic development organizations in the EDD region, only a few jurisdictions had projects that could fit the TBRPC criteria. In some cases, TBRPC rejected proposed projects because the proposed projects bore only a tangent relationship to economic recovery. In other cases, some jurisdictions did not submit applications as staff resources were focused on other efforts or the projects they did submit were ongoing and complicated projects that would take more time than TBRPC could sustain within the grant conditions. While every effort was made to ensure that TBRPC prepared studies in all six counties, this was not feasible, due to scheduling or scoping issues.
By the end of the CARES grant period, TBRPC prepared eight studies.

Each study is described in detail in the following sections.

1. Zephyrhills, Florida Aviation Cluster Study (p. 6)
2. Pinellas County Small Business Profile (p. 8)
3. Manatee County Recovery Plan: Charting a Rapidly Changing Economy (p. 10)
4. Visualizing Development Strategies for Highway U.S. 19 in Pasco County (p. 14)
5. City of Largo Health and Wellness Campus Strategic Plan (p. 16)
6. Rivergate-Palm District Conceptual Master Plan for New Port Richey (p. 18)
7. Pasco County Industrial Land Strategy (p. 20)
8. Pinellas County Industrial Land Tradeoffs (p. 24)

The lessons learned from CARES and key takeaways for Tampa EDD are described on page 26.
1. Zephyrhills Aviation Cluster Study

At the request of Pasco Economic Development Council (EDC), TBRPC conducted a feasibility study of how the City of Zephyrhills might leverage its existing General Aviation airport (Zephyrhills Municipal Airport) and the nearby industrial park as the physical base for an aviation cluster of industries. An industry cluster is a combination of inter-dependent industries in related fields that take advantage of scale economies in labor and equipment to develop specialized but strong job growing economies. Silicon Valley’s software cluster and Detroit’s automobile manufacturing cluster are good examples, but smaller clusters in many industries may grow under the right conditions.

TBRPC’s analysis drew upon an important study conducted by the Brookings Institution, which identified five characteristics of a strong cluster strategy: where decision makers are focused on establishing a robust ecosystem, not quick job gains; the strategy is industry-driven, university-fueled, government-funded; where decision makers are willing to place a collective big bet on a unique opportunity while the ongoing effort is championed by passionate, dedicated leaders, and the cluster is anchored by a physical center.

TBRPC’s study is focused on the characteristics of that robust ecosystem and the physical anchor of the cluster. The physical anchor could consist of the Zephyrhills Municipal Airport property and the nearby Zephyrhills Airport Industrial Park. The two components of this anchor would be combined in a two-tier land use strategy that clusters the most runway dependent firms “within the fence” of the airport, and less dependent firms, such as parts manufacturing or other supplies, focused within the industrial park.
In terms of a robust ecosystem, TBRPC showed that there are gaps in the supply chains of aircraft manufacturing in general and in parts manufacturing in particular by contrasting the effects of a single firm’s growth in Pasco County versus the growth of that firm in the more developed aviation cluster of Duval County. Overall, the analysis also makes clear that an aviation cluster strategy is built on more than fostering the growth of aviation manufacturers.

While Zephyrhills and Pasco EDC can pursue aviation manufacturing investment, the analysis shows that a broader base of services and skilled occupations is a foundational requirement of building an industry cluster. In other words, an aviation cluster approach requires public and private convergence on investment in education as well as a broad perspective on which firms to recruit and which trades to emphasize in the region’s community colleges.

With a few related firms, enough to form a kernel of an aviation industry in Pasco County, TBRPC recommends that the City of Zephyrhills and Pasco County build on their existing partnership to lay the groundwork for the physical anchor of a future aviation cluster at the Municipal Airport. While there are federal grants through the US Economic Development Administration that can assist Zephyrhills, the partners should decide on whether to “collectively invest” in attracting this cluster that can be championed by passionate and dedicated leaders.

In addition to several presentations to the local chamber of commerce, TBRPC also provided presentations to City Council and the report generated significant media interest.

Subsequent to the release of the study, the City of Zephyrhills accepted the study recommendations and incorporated the study into its near-term future plans with respect to the adjacent industrial park as well as “inside the fence” development at the airport.

Figure 2. Media coverage in the Tampa Bay Business Journal, February 2021

Report: Zephyrhills airport area seen as fertile ground for Pasco economic development
2. Pinellas County Small Business Profile

Pinellas County Economic Development (PCED) requested a County-wide profile of small businesses to guide recovery from COVID-19 and future development efforts, with a focus on a statistical portrait of County small businesses. Staff compiled and cleaned small business data collected from raw Quarterly Employment and Wages data from the state Department of Economic Opportunity. Per Pinellas County’s preferences, a small business was defined as any privately owned business with fewer than twenty employees.

As a statistical profile, TBRPC used modeling tools include REMI, IMPLAN, STATA and RStudio to present the data visually in a useful fashion for PCED and Pinellas County. The study concluded in August 2021.

The following are the study’s key findings:

1. Most firms (67 percent) are considered small businesses in Pinellas County, but these firms only employ about 38 percent of total employees in the County

2. Small businesses comprise roughly 1/3 of Pinellas County’s total economic value (Gross County Product)

3. The four largest sectors of small business are in accommodation and food service, retail, health care, and professional services, employing more than half of all small business employees

4. COVID-19 related closures resulted in the largest losses in jobs occurring in accommodation and food services, construction, and professional services

5. COVID-19 reduced the number of open and operating small businesses by 26 percent, employees by nearly 14 percent between the 2nd quarter of 2019 and the 2nd quarter of 2020

6. In 2019, average firm size was 7.9 employees, in the second quarter of 2020, average firm size rose to 9.2, compared to 18 employees per firm for all employers in 2019. Accommodation (15.5), manufacturing (10.2), and educational services (9.4) all had higher than average employees per firm. Generally, this shift suggests that larger firms were more resilient. Moreover, the statistic reflects the loss of very small businesses (five employees or fewer). Figure 3 depicts which industries saw the largest shifts in employment between 2019 and 2020.
Figure 3. Change in Employees by Industry in Pinellas County from 2019-2020

3. Manatee County Recovery Plan: Charting a Rapidly Changing Economy

Manatee County’s Office of Redevelopment and Business Opportunity (REO) requested that TBRPC EDD staff perform an analysis of the impacts of COVID-19 related economic closures on the County. As well as quantifying economic damages, staff included a report of County-initiated recovery activities performed and offered a plan for Manatee County’s recovery based on existing plans and its unique economic make-up.

TBRPC’s perspective was broad, and focused on long-term changes to the economy, from an analysis of the County’s economic base, used a variety of indicators — QCEW, REMI and Postal Service data for related migration data, as well as temporary site planning considerations for adaptive re-use of closed commercial sites, and relaxing existing regulations to ensure continuity of businesses. Also, Manatee’s strikingly low vaccination rate was cited as a specific contributing factor to the County’s slow recovery.

The study concluded in November of 2021. Public presentations are still pending.
Source: REMI PI+, v. 2.5, 2021. "Industries in black are low-wage consumption focused. Grey are also consumption focused but generally higher wage."
Figure 5. Migration Gains and Losses by Zip Code in Manatee County from 2019-2020

Key Findings:

1. Manatee County’s economy is driven by consumer spending, recovery will depend upon increasing public confidence in how people spend money in the County and on public sensitivity to the risks of COVID-19 exposure.

2. Retail sales dropped 21 percent in the first 6 months of the pandemic.

3. Closures and the recession caused drastic drops in vehicle trips, reducing retail trips by 20 percent.

4. The total economic output of the County lost about $645 million, about 4 percent of its 2020 level, between 2020-2021, with significant fluctuation over the course of the year.

5. Losses to total personal income were modest, less than 1 percent between 2020-2021, with significant fluctuation over the course of the year.

6. Annual deaths exceed births, meaning that Manatee’s growth is driven by migration from other areas and that residential consumer spending grows with migration.

7. Commercial rents showed modest declines during the peak recession months, while shopping center vacancies continued to increase.

8. More than 1 out of 3 residential moves to the Tampa Bay region was to Manatee County.

9. About 1 in 3 Manatee workers is a Baby Boomer, with an accelerating retirement rate.

10. Residents over the age of 75 participate in the labor force at more than twice the national average for the same group.

11. While tourism focused industries suffered the most job losses, manufacturing jobs were not as impacted. Some manufacturing firms even added jobs.

12. Manatee County outperformed other highly tourism dependent Florida counties.

13. Manatee County has a lower than state average vaccination rate, which may contribute to a delayed recovery; promoting vaccination as a way to generate growth could be helpful.

14. Manatee County has relatively few jobs that support telework and this could be a disadvantage in recovery efforts; encouraging employers to expand telework options may be helpful.

15. Empty retail space should be repurposed for community needs, activity spaces, even as showcases for non-brick and mortar retailers.
4. Visualizing Development Strategies for Highway U.S. 19 in Pasco County

Although there are highly marketable natural amenities and unique attractions within Pasco County and its cities and towns, the negative appearance of vacant or underutilized properties along Highway U.S. 19, combined with unsafe roadway conditions and poor pedestrian infrastructure, has undesirably impacted its economic development potential.

In 2021, Pasco County requested an analysis of redeveloping blighted commercial areas along the US-19 corridor in western Pasco. TBRPC prepared a study for Pasco County which visualizes conceptual development strategies using three-dimensional modeling within four pedestrian-oriented activity nodes along the Highway U.S. 19 corridor and in two specific example areas: the Gulf View Square Mall and Universal Plaza. In addition, an analysis of the potential economic development impacts of the proposed redevelopment concepts was provided for further consideration. Figure 6 depicts the study area.

Figure 6. The Harbors West Market Area’s Identified Planning Areas, Districts and Activity Nodes
TBRPC recommended a series of actions for Pasco County to consider that can transition the Highway U.S. 19 corridor from an underutilized commercial strip corridor to a 21st century corridor for economic activity, livability and resilience. Those recommendations are as follows:

1. Strategic Redevelopment that Creates Mixed-Use, Walkable Environments

   Realign aging commercial strip corridors with the forces of market demand by strategically restructuring suburban development into an urban form which property owners, developers, and communities will once again invest in. Compact and walkable mixed-use development patterns, as provided by the examples for Gulf View Square Mall and Universal Plaza, model concepts that can be replicated in other locations with the Harbor area.

   Work with residents, business owners, and developers to identify potential locations, partnerships, and funding opportunities for activity nodes along Highway U.S. 19. Small Area Plans should be developed to explore potential land use and other regulatory changes in key activity nodes throughout the corridor.

2. Economic Development and Workforce Housing

   Prioritize an economic development approach specific to the West Market Area that attracts new, higher paying jobs while improving the existing workforce’s skills and providing employment and homeownership assistance. These actions can lessen the possibility of displacement as it relates to new growth, economic expansion, and gentrification. Evaluate the possibility of reusing vacant, under-performing, or abandoned retail strip centers into quality workforce housing.

   Plan the surrounding areas with a mix of uses that complement housing. Create a compact cluster of housing, jobs, and services in designated nodes to support existing and new businesses, as well as entertainment to enhance livability for the neighborhoods along U.S. 19 and all of the Harbors West Market Area. The diversification of uses and new investment will stabilize property assets and grow the existing tax base.

3. Sustainable and Resilient Development

   Ensure that the Highway U.S. 19 corridor redevelops in a greener, more sustainable and resilient manner by adding trees, a variety of landscaped spaces, and attractive stormwater facilities that bring people and nature together, as well as encouraging energy efficient and low-impact design practices throughout the corridor.

   Identify green building and resilient site design strategies and other sustainable land management practices that can be incorporated into redevelopment projects and provide incentives for implementation of these principles.

The study concluded in November 2021 and TBRPC staff presented its results to the Pasco County Board of Commissioners in January 2022. The study has generated media interest and continues to support planning initiatives in the Highway U.S. 19 corridor.
5. City of Largo Health and Wellness Campus Strategic Plan

The City of Largo’s Medical Arts District, also referred to as the Largo Health and Wellness Campus, offers comprehensive healthcare to residents and visitors from throughout the Tampa Bay region. The district was designated in 2009 to reflect the economic importance of the medical sector as a community asset and to support its health and wellness-related businesses. The designation of the formal district and the creation of a master plan in 2015 were critical steps toward achieving the City’s broader objectives; however, additional planning was needed to garner the community support and investment necessary for effective plan implementation.

In 2022, TBRPC prepared a strategic plan which complements and expands upon the City’s past planning efforts by incorporating three-dimensional visualizations of potential redevelopment concepts and case studies that demonstrate the economic impacts of medical arts districts in communities as well as other site-specific economic development considerations.

Figure 7. Excerpt from the Strategic Plan

![Diagram](Image)
The staff of the Tampa Bay Regional Planning Council (TBRPC) presented a series of recommendations for the City of Largo to consider:

1. The 2015 Largo Medical Arts District Master Plan represented a significant first step in defining a vision and development strategies for the district; however, plan implementation is an ongoing process that must be adapted to new conditions and circumstances. Incorporate the results of the urban design Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis in future planning and stakeholder engagement efforts. The SWOT analysis identified recent public investments, marketability and its convenient location among its key strengths, limited access, connectivity and visibility, and a lack of identity and branding as existing weaknesses, the incorporation of gateway and landmark signage and new programming as future opportunities and the potential for stormwater flooding among its future threats.

2. Communities near and far are actively developing Medical Arts Districts. Use the case examples provided to inform stakeholders of the co-benefits of district-wide collaboration. By learning from the steps of others, City staff and stakeholders can anticipate the Largo community’s journey toward progress, from immediate next steps to long term planning strategies.

3. There are many stakeholders - including property owners, hospital representatives, and residents - that will be affected by the district's redevelopment. New participants in this process will need to be engaged and previous participants "brought up to speed." This strategic plan includes redevelopment concepts and economic development considerations for support in the City's public outreach efforts. Phased action items and considerations regarding potential funding, the magnitude of costs, project partners, and methods of engagement are provided as an example framework for plan implementation.

These recommendations, and the strategic plan overall, reflect the visions, strategies, and priorities as defined by the community through the City of Largo's prior public engagement efforts and in efforts by TBRPC to engage a targeted list of stakeholders provided by the City, primarily existing business owners.

The study concluded in May of 2022, and Largo staff have since applied this analysis and its findings to support a continuation of community engagement workshops with stakeholders.

A public presentation to the City of Largo is scheduled in December 2022.
6. Rivergate-Palm District Conceptual Master Plan for New Port Richey

The City of New Port Richey is evaluating the growth and changes that are underway in the Rivergate-Palm District. The redevelopment of this area provides an opportunity to improve the community’s quality of life, attract tourism, and spark economic development within Downtown New Port Richey.

Following a ‘rapid-redesign’ exercise with 3D visualization and animation with City staff in 2020, TBRPC prepared a 2021 conceptual master plan for the district’s redevelopment with a supporting three-dimensional model and video animations. In addition, the study included a potential economic and fiscal impact analysis based on floorspace and industry averages. Collectively, these resources equipped City staff with visually compelling and economically assessed “proofs of concepts” to be considered when evaluating development potential and projects within Downtown New Port Richey.

Figure 8. Excerpt from Conceptual Master Plan
Building on the theme of resilient development, TBRPC recommended a series of actions for New Port Richey to consider which leverage the greatest benefits to the City from the redevelopment of the Rivergate-Palm District. Those recommendations were as follows:

1. Address the results of the Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis in planning effort. The SWOT analysis identified existing historic character as a key strength, pedestrian safety and the overall perceived lack of safety and security as existing weaknesses, walkability and mixed use development as future opportunities and the potential for increased flooding among its future threats.

2. Develop guiding vision statements through effective community engagement with all stakeholders. There are many property owners that will be affected by the area’s redevelopment, and its success will depend on extensive community discussion and feedback. The results of a community visioning exercise and the guiding vision statements developed for the conceptual master plan are included to expand upon in continued community engagement efforts.

3. Implement Land Development Regulations and Design Standards that support the community’s vision. Any proposed modifications to development standards should support the District’s community-driven values and goals and encourage private property owners and investors to create development that is appropriate to the urban fabric. These modifications will help create certainty that redevelopment and expansion is furthering the goals of this conceptual plan and the broader planning efforts underway through the Rivertown Revival Master Plan development. General development standard recommendations and related action items are included for reference within the conceptual master plan.

4. Consider the results of TBRPC’s economic analysis of the plan’s proposed conceptual development, which describes the potential changes in property values and the resulting increases in annual tax review over a 20 year period.

TBRPC staff met with community stakeholders in a charrette-style visioning session in the first phase of the project. A final presentation was made to the New Port Richey City Council in March 2021, thereby concluding the study.

Efforts to engage community members and develop plans to elevate the prominence of Downtown New Port Richey in relation to Highway U.S. 19 have continued as a result of this planning process.
7. Pasco County Industrial Land Strategy

Facing development pressures from the fastest growing housing prices in the Tampa Bay region, a recent wave of comprehensive plan amendments to clear the way for more residential development in Pasco County has raised concerns about the County’s supply of industrial land. In June 2021, those concerns spilled over into public debate over the development of the Central Pasco Employment Village, where landowners sought to develop residential uses on a portion of 2,400 acres of Employment Center designated land south of SR 52, while economic development advocates argued for a jobs-first approach. Even though a compromise was eventually reached, any loss of target industry development capacity can result in lost opportunities for high wage jobs.

Moreover, industrial to residential land conversion is compounding the existing jobs-housing imbalance in Pasco County. With the longest commutes in the six county Tampa Bay region (32 minutes versus a regional average of 27.6 minutes per day), the loss of industrial land in Pasco County has both short-term costs to drivers and to long-term economic growth in the County. Weighed against the short-term job creation benefits of building homes, each acre of industrial land that is converted to residential uses costs the County is equivalent to a net loss of about $2.1 million in personal income through 2050.

At the request of Pasco County Economic Development, TBRPC prepared an industrial land strategy to help the County navigate competing demands for job-supporting land versus housing-supporting land. Working with Pasco County staff, the Tampa Bay Regional Planning Council (TBRPC) focused on the leading edge of job creation, the availability of land for target industries in the Future Land Use designations of Employment Center (EC) and Industrial-Light (IL).

With multiplier effects creating indirect jobs, increasing the share of target industry jobs in the Pasco economy will help the County provide enough jobs to County residents over the long term. TBRPC conducted an analysis of both the job creating capacity of the County’s industrial land and of projects within Planned Developments to scope the need for additional EC and IL designated land. Additional EC and IL provides more ground to reach a related goal, to raise the percentage of all target industry jobs from one in ten jobs to one in four jobs, which is the same level of those target jobs in Hillsborough and Pinellas counties.
Overall, TBRPC found that the existing inventory of land designated as EC and IL is sufficient on a gross acreage comparison basis to meet future job needs. However, the availability of appropriately sized sites usually required to support target industries in corporate business and industrial parks is limited. As shown in Figure 9, industrial land is highly fragmented and may not meet current site development requirements for target industry uses.

Given changing industry needs and potential site-specific obstacles to development, developer choices and market trends, TBRPC identified several potential Areas of Interest where the County may initiate Future Land Use amendments to add more EC and IL designated land in a more compact land use pattern.

Figure 9. Size (Acres) Distribution of EC and IL Designated Buildable Parcels is Skewed

The principal existing conditions of Pasco County industrial land are:

- With more than 8,300 acres of developable land suited for target industry growth, Pasco County does have significant space for job growth; however
- The Pattern of EC and IL Future Land Uses is both scattered across the County and highly fragmented, with half of buildable parcels under 4 acres; but
- Prevailing industrial site development norms and tailwind trends in logistics sustain industry demand for larger sites; and
- While a significant share of future job growth may be absorbed in projects that could be developed on small parcels, the availability of large EC and IL parcels for corporate business and industrial parks for long-term job growth is limited; consequently, those areas are
consistent with the needs of industrial activity and close to existing industrial areas and follow existing truck routes and freight rail lines. Clustering future EC and IL where those designations already exist will help to alleviate potential conflicts with residential uses when those uses are close to industrial activity and supports sharing infrastructure development costs. Those Areas of Interest are tentative, but with further development by the County those areas can become part of an industrial sanctuary that protects the industrial land base of the County.

Another aspect of the Strategy was to develop tools that help decision makers weigh the relatively benefits of economic development decisions. In Figure 11, TBRPC produced a trade-off chart that compares the varying uses of a single acre of land and how different decisions about future land uses would impact the economy on an annual basis.

Figure 10. EC/IL Expansion Area of Interest (AOI) in Pasco County
In closing, TBRPC recommended that the County consider:

- Setting a job growth goal through 2050 to balance future target industry serving land use decisions against the other land use needs of the public. The goal should be directed at improving the jobs-employed residents ratio and the share of target industry jobs within County jobs, adding about 150,000 jobs, of which 1 out of every 4 jobs should be in target industry jobs;

- Adopting land use policies that accommodate job growth goals, protecting EC and IL land by:
  - Establishing an industrial land sanctuary to maintain an available land inventory of at least 2,000 acres of parcels greater than 50 acres;
  - Assessing the need for a new flex land use designation for corporate business parks and compatible light industrial uses, along with supporting zoning that requires a minimum 50-acre lot size;
  - Consolidating fragmented parcels through land assembly; and facilitate redesignations away from EC and IL when those parcels are not viable for supporting target industry growth; and
  - Encouraging redevelopment of the extensive inventory of obsolete office and industrial sites through targeted incentives.

Source: TBRPC analysis of Pasco Property Appraiser Data; IMPLAN, 2022. * Includes sales and other taxes, special assessments, motor vehicle and license fees.
8. Pinellas County Industrial Land Tradeoffs

At the same time Pasco County was considering changes to its industrial land policies, Pinellas County began an update of the County’s target industry land. Because there was a close overlap between the findings of the Industrial Land Strategy for Pasco County and the scope of Pinellas County’s update, TBRPC provided data and “lessons learned” from the Pasco study to Pinellas County. Using a similar methodology for Pinellas, TBRPC recommended that the County maintain the existing one-to-one balance between jobs and employed residents to help sustain Pinellas County’s relatively low average commute times and make County businesses more competitive.” of the comprehensive plan, or the alignment between plan goals and outcomes.

Planners have long used jobs-housing balance in a prescriptive sense—if a community supports some quantity of jobs, then plans must account for how many housing units should be built to ensure the regional transportation system is not overwhelmed by in-commuters. While the ideal ratio of jobs to housing units, or more accurately, employed residents, varies across the United States, research findings have found that where job gains occur when the ratio is less than 1.2 or when housing gains occur when the ratio is greater than 2.8 average commute times decrease, and therefore productivity losses and driver costs decrease. Of course, results do vary with system-wide transportation efficiency and personal decisions as two-worker households balance different job locations, job turnover and family activities.

Figure 12 depicts the relationship between the average commute time reported by workers driving alone and the Job-Employed Ratio of selected Florida counties using American Community Survey Census and Bureau of Labor Statistics data for 2019. Overall, the data show that there is an inverse relationship between commuting times and jobs-employment ratios, where commute times increase as the job-employed resident ratio falls in “jobs-poor” counties, and commute times rise again as that ratio increases beyond 1.1, as in-commuters contribute to rising commute times in “jobs-rich” counties. Generally, the lowest average commute times are in counties with a “jobs-balanced” ratio of 1.0.
Figure 12: Jobs-Balanced Counties Average Shorter Commutes than Jobs-Poor or Jobs-Rich Counties

Source: TBRPC analysis of U.S. Census Bureau, Mean Commuting Time for Workers (5-year estimate) in Pinellas County, FL [B080ACS012101], retrieved from FRED, Federal Reserve Bank of St. Louis; fred.stlouisfed.org/series/B080ACS012101, other selected Counties; March 24, 2022. REMI 2.5
Lessons Learned from CARES

Since the inception of the Tampa Bay Economic Development District (EDD) in 1999, TBRPC has worked with local partners to help develop job-creating projects in the Tampa Bay region. Primarily focused on research and economic modeling of potential projects, the Tampa Bay EDD helped to create jobs throughout the District. However, in recent years there has been a moderate decline in requests for this kind of work.

CARES Act funding supported the District’s work in rethinking its Economic Analysis Program, by complementing economic analysis with visualizations three-dimensional (3D) modeling and other simulation work to help local governments and their private sector partners to better imagine not just individual projects but contextual questions related to land use decisions. Typical assistance included peer-to-peer technical assistance and facilitated community engagement resulting in conceptual site plans and engaging visual representations of planning proposals (Figure 13). Services do not include engineering design or construction.

Key takeaways for Tampa EDD in this period are:

1. As technology evolves it is important for EDD staff to continue to assist local governments that have limited capacity or internal technical expertise. The CARES Act studies demonstrated a need among local governments for advanced economic analysis, 3D design and graphic visualization services to facilitate modern plan development and implementation. These services include technical assistance in economic and fiscal impact analysis with IMPLAN® and REMI PI+®, cost-benefit analysis, public return on investment in urban design, geographic information systems (GIS) mapping and analysis, flood modeling and graphic communication (data visualization/infographics).

2. The current Partnership Planning Technical Assistance Program needs to be shifted to more long-term and impactful engagements with local economic development partners, with greater emphasis on visualization and supporting economic and fiscal analysis to compare alternatives, and less emphasis on quick turnaround studies, unless they are urgent in nature.

3. EDD staff must be able to navigate the trade-offs between the relative impact of a study or project and the political pushback that can occur when there are high stakes for communities. Going forward the EDD will need to develop internal guidance on avoiding some of the pitfalls attending important projects.

4. Due to the relatively modest staffing levels for economic development, the EDD must be cautious about participating in projects that are likely to draw contentious public engagement. As a technically focused problem appearing to be partisan on a specific issue or any appearance of pre-determined outcomes may hurt the reputation of the Council in its broader role of the “Convener of the Region.”
Figure 13: Highway U.S. 19 - Universal Plaza, Before and After 3D Visualizations

BEFORE - Existing strip plaza development, auto-oriented structures and suburban form.

AFTER - Mixed-use redevelopment concepts with active public spaces and urban walkable blocks.