



Hillsborough County, Florida December 10 - 15, 2017

About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- ULI is a membership organization with nearly 40,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.
- What the Urban Land Institute does:
 - Conducts Research
 - Provides a forum for sharing of best practices
 - Writes, edits and publishes books and magazines
 - Organizes and conducts meetings
 - Directs outreach programs
 - Conducts Advisory Services Panels







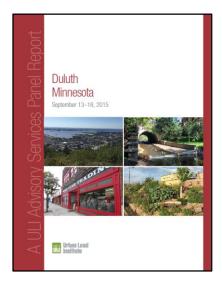






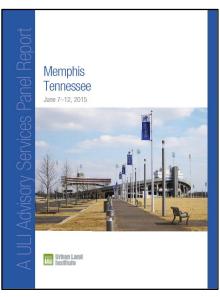
The Advisory Services Program

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











Presentation Overview

- I. Introduction
- II. Economic and Market Snapshot
- III. Planning and Development Strategies
- IV. Economic Development Strategies
- V. Fiscal Impacts
- VI. Public Engagement and Regulatory Framework
- VII. Implementation
- VIII. Conclusion



Thank You to Our Sponsors





Thank You to Everyone Else....!

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Panelists

- Alan Razak, AthenianRazak, LLC, Philadelphia, PA
- Jordan Block, WSP USA, Denver, CO
- Laura Bonich, NV5, Jackson, WY
- Dan Conway, THK Associates, Inc., Denver, CO
- Kazi Haque, City of Maricopa, Maricopa, AZ
- Molly McCabe, Hayden Tanner, LLC, Bigfork, MT
- Christine Richman, GSBS, Salt Lake City, UT
- Ross Tilghman, Tilghman Group, Seattle, WA
- Andrew Watkins, SWA Group, Laguna Beach, CA

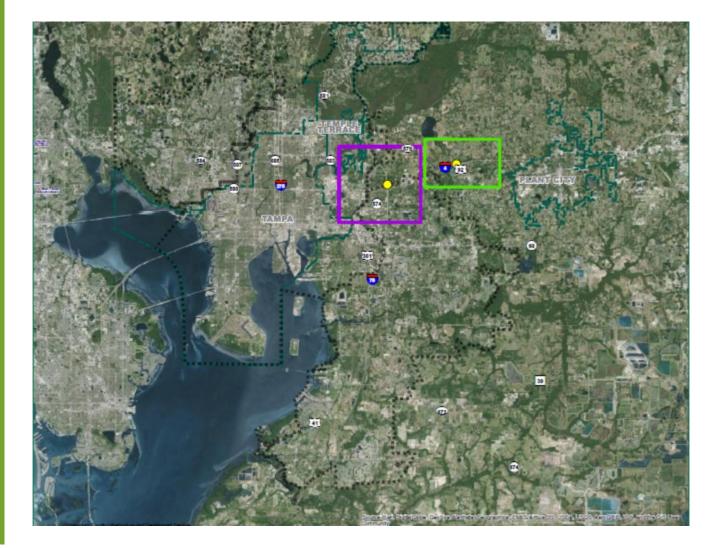
Urban Land Institute Staff

- Beth Silverman Senior Director, Advisory Services
- Rose Kim Senior Director, Special Events





Panel Study Area











The Questions

Categories Questions

Target Industries and Identity	How can the I-4 Corridor be leveraged for future sustainable development, and create a sense of "place" to incentivize opportunities that will achieve desired economic development outcomes like attracting targeted industries, skilled labor and higher wage jobs?
•	What are recommended, feasible development scenarios given our County's and region's current business environment and attributes in light of real estate and technology market trends?
	How can Hillsborough County help cultivate a unique identity for the identified Study Areas along the I-4 Corridor?
Future Growth	Identify optimal and competitive sites for potential development in the Study Areas.
Scenarios	What is the optimal mix of jobs, retail, and residential development, including workforce housing?
	Provide recommendations regarding the implementation and timing of regulatory considerations that will facilitate future planning and development in the Study Areas.
	What are optimal community engagement strategies and tools to help foster public education and community participation related to future planning and development in the Study Area?
Feasibility, Financing and Strategy	What are the most financially feasible strategies to achieve optimal economic outcomes? What are the challenges, strategies, and benefits of investing in future high quality job creation along the I-4 Corridor?
	What are the risks of taking no action in the I-4 Corridor? What are possible financing and funding mechanisms for future development, and what governmental and quasi-governmental models could serve as alternative to, or work in partnership with, county-provided infrastructure and services?
Policies, Regulations and Infrastructure	What are potential land use and regulatory opportunities and constraints that will optimize future development in the I-4 Corridor? What policies, regulatory processes and infrastructure considerations should be evaluated when considering development outside the Urban Service Area?
	Evaluate opportunities for Transfer Development Rights for future development.
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The Assignment

The Questions Distilled

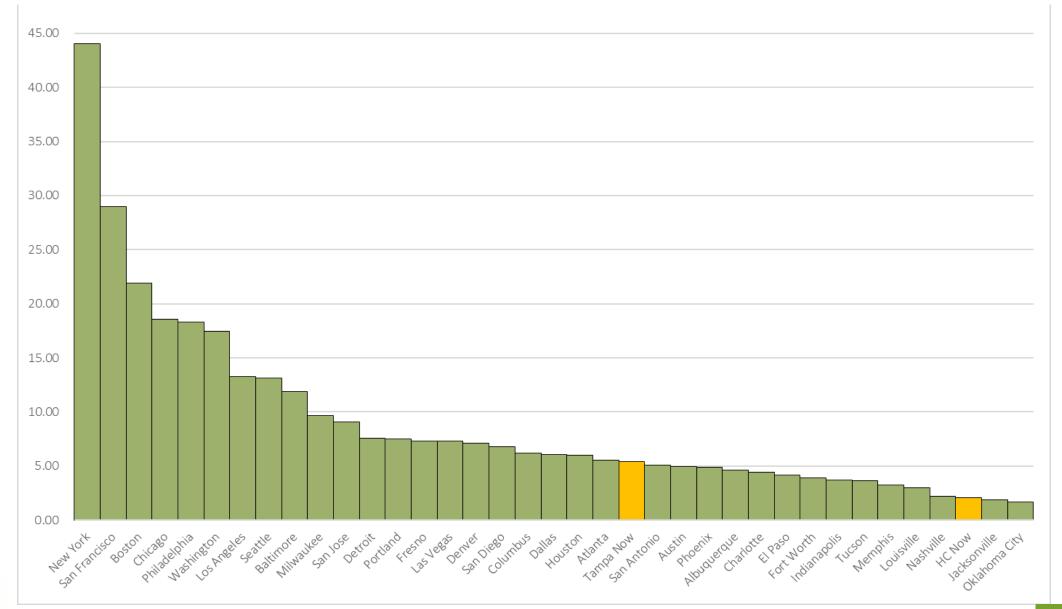
- Should the study area be one of the target areas for development through 2040?
- If so, what should it look like?
 - Jobs
 - Use mix
 - Character
- What are tools for managing process?
- What are realistic financial strategies?





Tampa Bay/Hillsborough County

Density

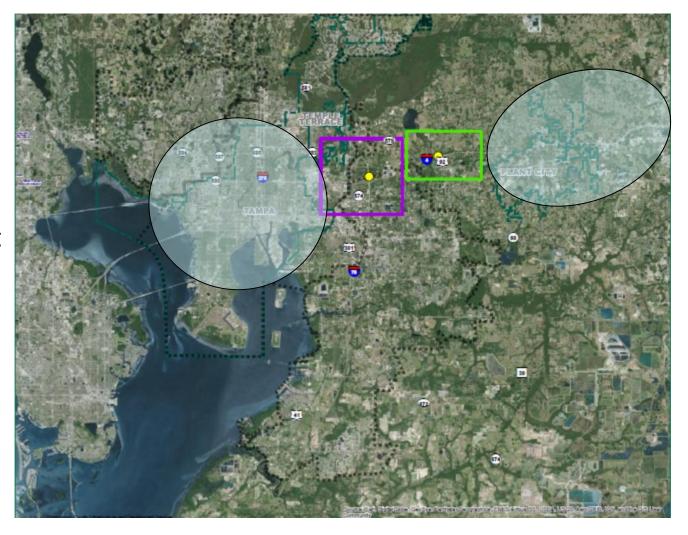




The Role of the Study Area

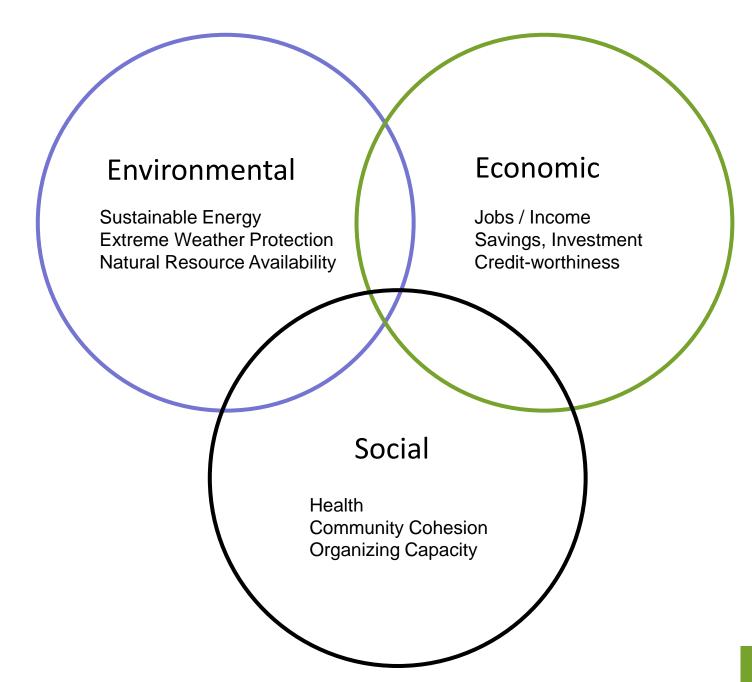
The Hole in the Doughnut?

- Centered on a key scarce asset: major transportation corridor
- But encompasses another scarce asset - Tampa Bay's unique rural character
- Lowest-cost expansion of current developed area? What's the measure?
- Demonstration for how Hillsborough County wants to look in the future
- Important because how the region grows affects its regional competitiveness



Getting Your Future Right

Evaluate Cost and Return Comprehensively





What We Observed

- Time to Act: Growth is imminent
 It's time to choose whether growth will lead to positive change or erode what makes you unique.
- Change is needed
 Development forms, systems, processes and methods of communication need to match the coming challenge.
- Focus on how you stack up with competitive regions
 Other regions are implementing and planning responses to changing technology, demographics and development drivers. The coming effort should be a unified play against your competition.

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Market Trends

4 COUNTY	Employment	Population	Housing Units
2017	1,766,700	3,039,500	1,480,100
2040	2,744,200	3,925,900	1,843,900

Projected Change

2017-2040	977,500	886,400	363,800	
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Hillsborough County	Employment	Population	Housing Units
2017	933,900	1,388,400	639,400
2040	1,442,200	1,956,500	864,700

Projected Change

2017-2040	508,300	568,100	225,300	
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Hillsborough County Land Demand

Industrial	4 County	Hillsborough County
Annual Market	5,200,000 sf	2,675,000 sf
23 years	120,000,000 sf	61,525,000 sf
Acres @ 40%	6,890 ac	3,530 ac
R&D 20%	1,380 ac	710 ac
Office Annual Demand	3.1 million sf	1,650,000 sf
23 years	71,300,000 sf	37,950,000 sf
Acres (.25 Coverage)	6,550 ac	3,485 ac
Retail Annual Demand	1.2 sf	750,000 sf
Annual Total Housing Demand	Units	Units
Total Housing	15,820	9,800
Rental Apartments	4,900	2,900
Townhomes & Condos	2,100	1,300
Single Family Homes	8,820	5,600



Greenfield Developable Acreage, Demand vs. Supply by 2040

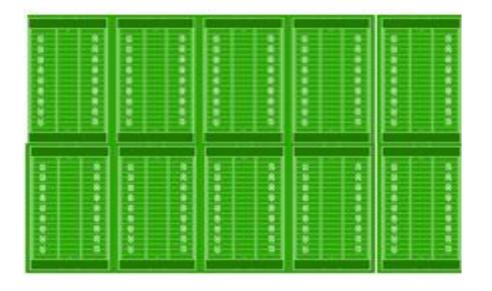
Hillsborough	Total Acreage	Developable Acreage
Total County Acreage	682,660	155,759
Outside Urban Service Area and 3 Cities	300,169	26,888
In 3 Cities + Unincorporated Hillsborough	382,491	128,870
Unincorporated Hillsborough Co. Service Area	211,647	19,323
Total Hillsborough County 2040 Demand		47,540



Greenfield Demand is 47,540 Acres

50 single family units at 5 units per acre = 10 acres or 10 Football fields





The 2040 demand is for 10,000 units per year or 210 of these!



Remaining Development Capacity in Urban Services Area

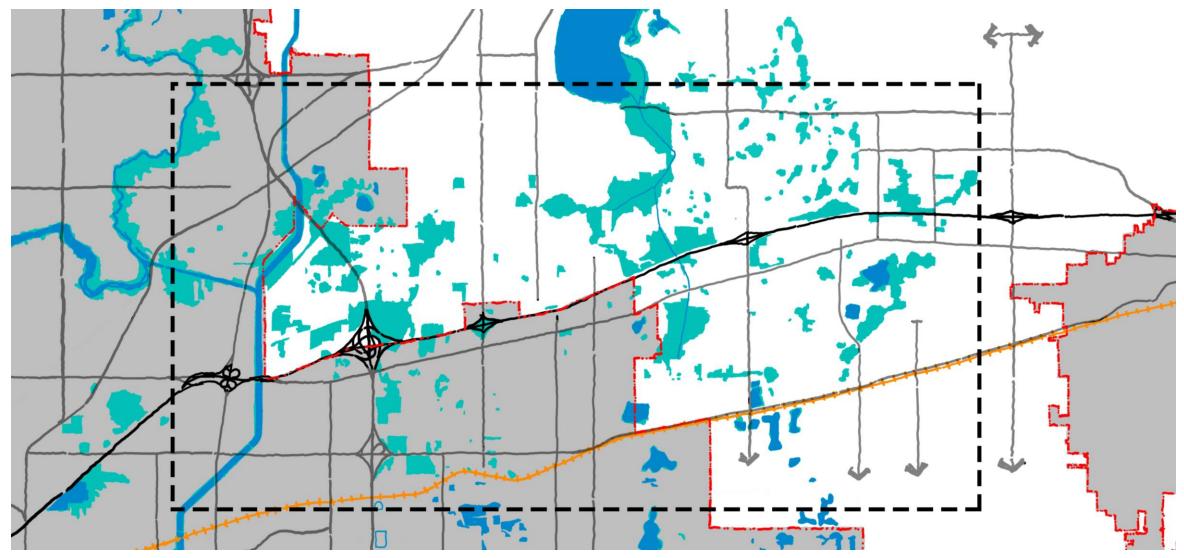
- Greenfields = 19,323 acres
- Sufficient for up to 9 years
- Plan for USA boundary expansion within 5 years



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Planning – Study Area





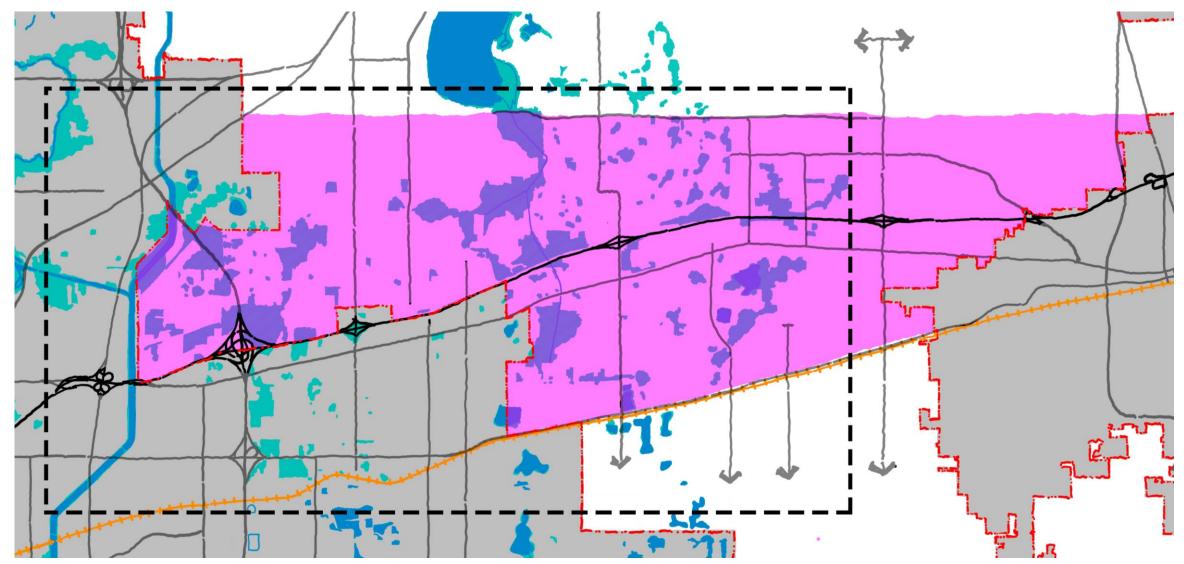
Planning for 2040

Development Scenarios

- Maximum Capacity Analysis:
 - Buildout of the 21,500 acres in the I-4 Study Area outside the USA
- Strategic Economic Development Nodes
 - Targeted Employment and Housing on 10% of the Study Area Land outside the USA
- Hold the Line
 - Phase 1 A 5 to 8 year emphasis on development within the USA to promote increased density and sustainable best practices



Planning – Maximum Capacity Analysis – 21,500 AC



Planning – Maximum Capacity Analysis

For Information Only

- 21,500 acres outside Urban Services Area
 - ½ the area required to meet 2040 greenfield growth
 - 30% for Wetlands and Open Space
 - 20% for Roads, Schools, Parks, Public Services
- 12,000 developable acres remain
- 170,000 people provides 30% of the 2040 County Housing
- 102,000 jobs provides 20% of the 2040 County Jobs



Planning – Maximum Capacity Analysis

			SF/Employee	SF of	Employees
	FAR or Units		or	Development	or
Land Use	per Acre	Acres	People/Unit	or Units	Population
R&D	0.4	325	350	5,662,800	16,179
Office	0.25	645	200	7,024,050	35,120
Retail	0.22	150	250	1,437,480	5,750
Industrial	0.4	1300	500	22,651,200	45,302
Total		2420		36,775,530	102,352
For Rent	20	448	1.75	8,970	15,697
Single Family	6	8766	2.8	52,596	147,269
Attached	10	366	2.1	3,655	7,676
Total		9580		65,221	170,642
Maximum Capacity	y Analysis Acres	12,000			

Urban Land Institute

Advisory Services Program

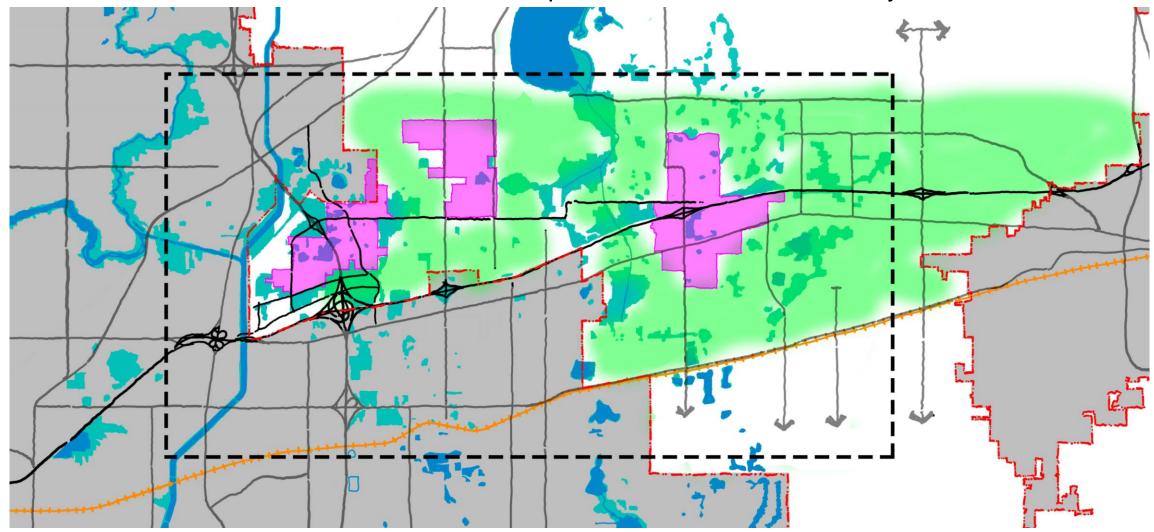
Planning – Maximum Capacity Analysis

The Panel does not recommend that the study area be fully built out because:

- Existing density in the USA is only 1.3 units per acre- additional development capacity exists
- There is value in preserving the unique rural character and natural features
- Promotes a generic anywhere suburban development pattern
- It does not support sustainable development practices



Dense Nodes Preserve 90% of the Unincorporated Land within the Study Area



Targeted Employment and Housing

- Phased in 3 distinct development nodes
- 2,200 acres (10.2% of the 21,500 acres)
- 57,000 targeted jobs (everything except the industrial)
- 8,330 attached units (apartment, multifamily, and condominium)





Preserves 90% of the Study Area

			SF/Employee	SF of	Employees
	FAR or Units		or	Development	or
Land Use	per Acre	Acres	People/Unit	or Units	Population
R&D	0.4	325	350	5,662,800	16,179
Office	0.25	645	200	7,024,050	35,120
Retail	0.22	150	250	1,437,480	5,750
Total		1120		14,124,330	57,050
Multi-family	10	327	2.1	3,270	6,867
Apartments	20	753	1.75	15,060	26,355
Attached Total		1080		18,330	33,222
Total Acres		2200			



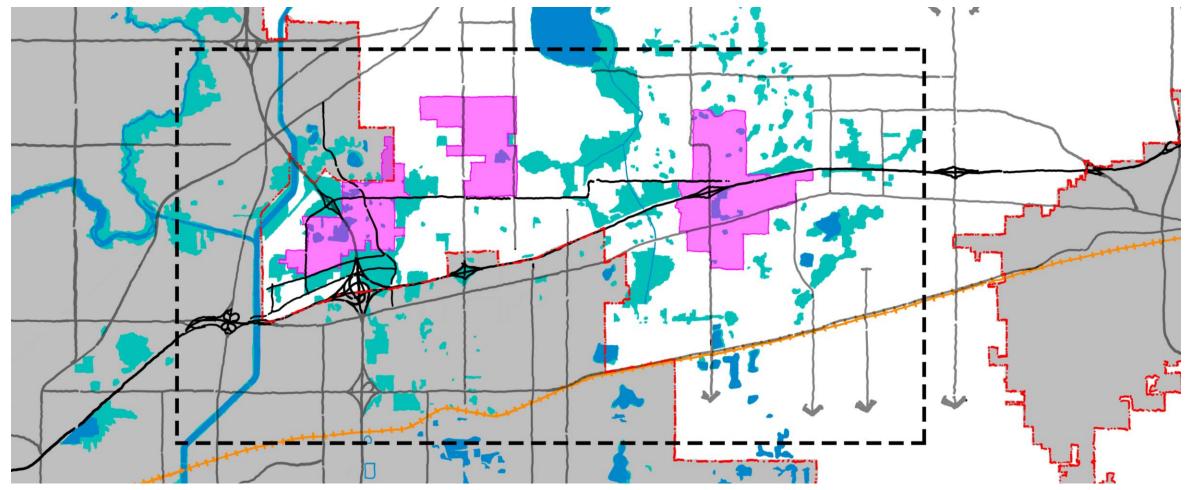
Targeted Employment and Housing

- Acreage for 100% of Research and Development, Office and Commercial jobs (no industrial)
- 1 attached housing unit for every 2 jobs
- Preserve existing rural development and character between nodes
- Leverage and expand existing transportation network
- Extend the existing water system and provide sewer service

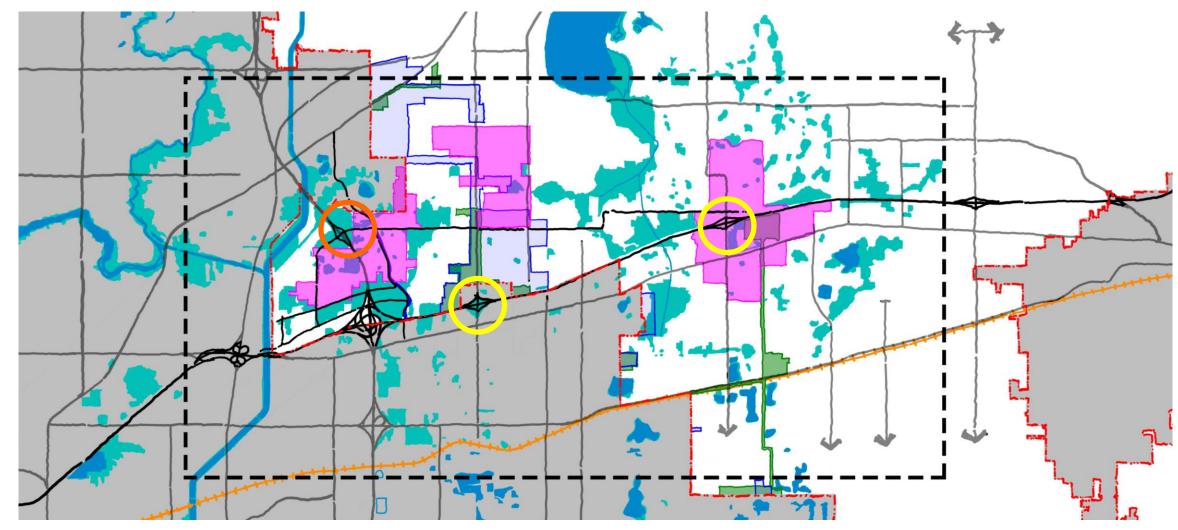




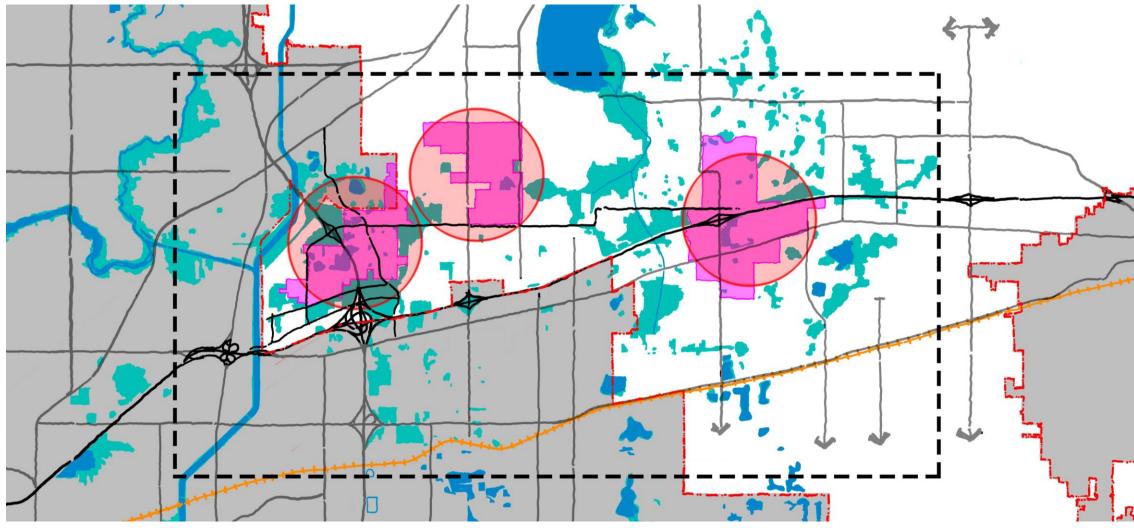
- 3 Nodes Totaling 2,160 AC of Potential Greenfield Development
- Each Node Oversized to Accommodate Wetlands and Existing Residential



• Nodes Build Off of Existing Infrastructure – Transportation and Utility Service

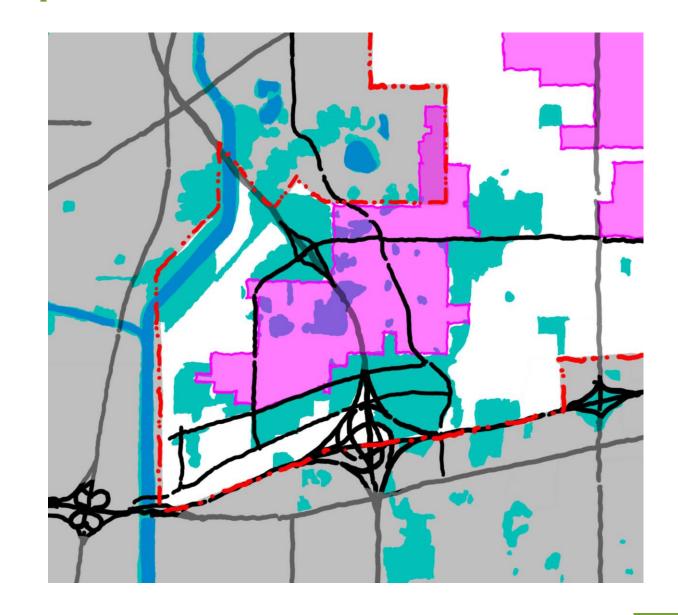


• Each Node is Dense and Relates to a 1 Mile Walk Radius



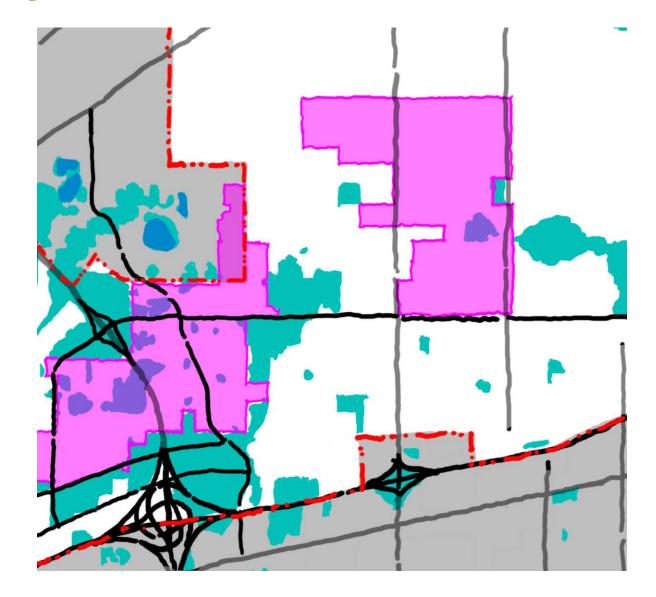
Area 1

- Approximately 400 AC of Greenfield Development
- Impacted by Wetlands
- 200 AC of Employment = 10,200 Jobs
- 200 AC of Residential = 3,400
 Units and 6,150 Residents
- 4-Year Build-Out
- New Access to Executive Airport from I-75
- Surrounded by Utility Service



Area 2

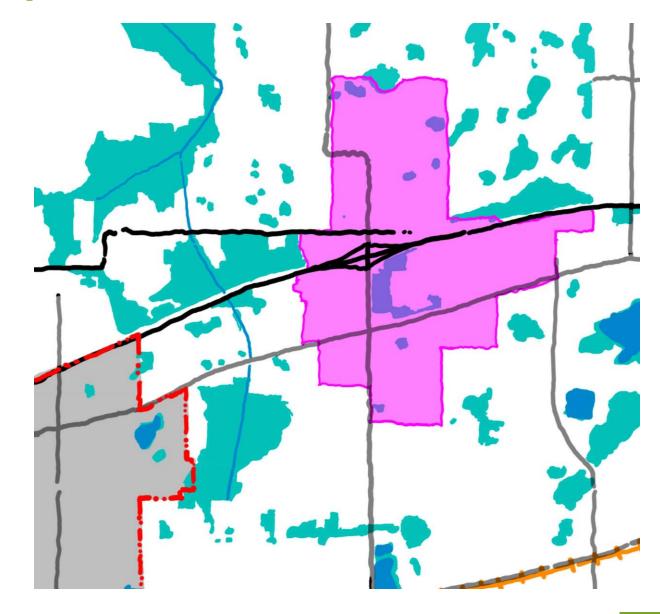
- Approximately 800 AC of Greenfield Development
- 400 AC of Employment = 20,375
 Jobs
- 400 AC of Residential = 6,800 Units and 12,300 Residents
- 8-Year Build-Out
- Connectivity through Area 1 and Access to from I-75 as well as Access from I-4 at the 579 Interchange
- Adjacent to Utility Service



Strategic Economic Development Nodes

Area 3

- Approximately 960 AC of Greenfield Development
- 480 AC of Employment = 24,450
 Jobs
- 480 AC of Residential = 8,150
 Units and 14,750 Residents
- 10-Year Build-Out
- Access from I-4 at the McIntosh Interchange



Strategic Economic Development Nodes

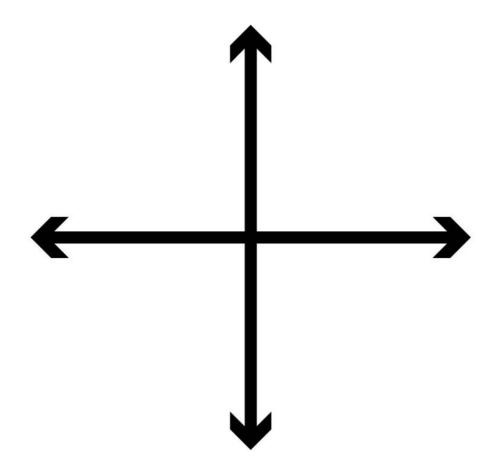
Character

- Dense Residential Development
 - No Single Family Detached
- Preserves 90% of Unincorporated Land within the Study Area
- Pedestrian Oriented Development
- Clustered for Transit Ready Development
- Great Place-making Opportunities



Transportation Strategy

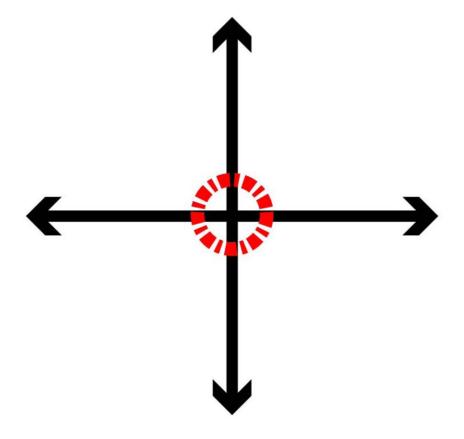
Capture Value of I-4/I-75 Crossroads





Transportation Strategy

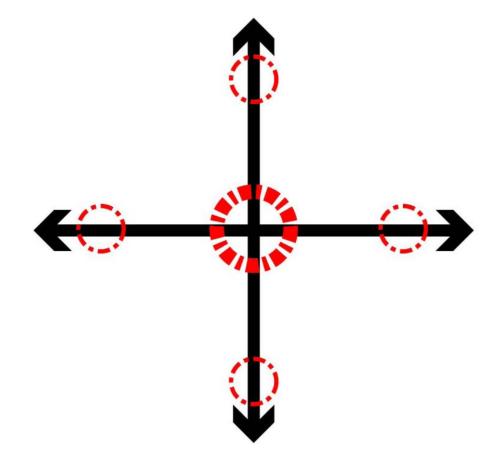
Regional Traffic Meets Here





Transportation Strategy

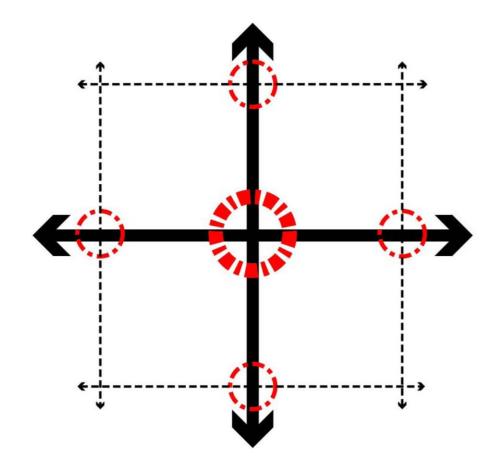
Access occurs at adjacent interchanges





Transportation Strategy

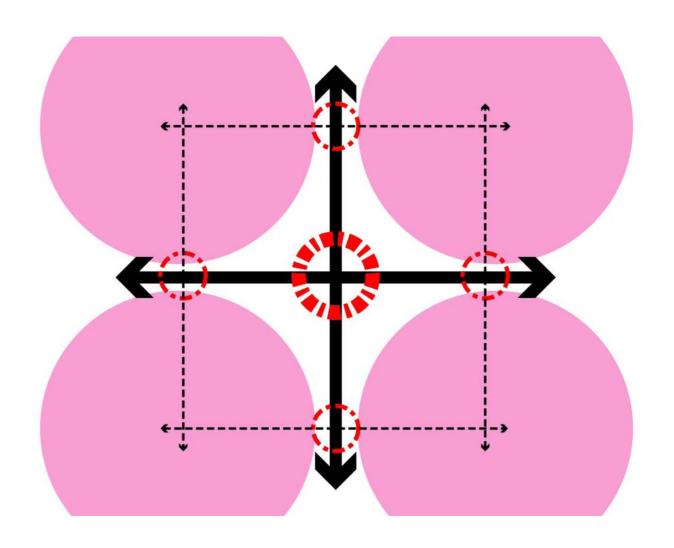
Arterial streets create local network





Transportation Strategy

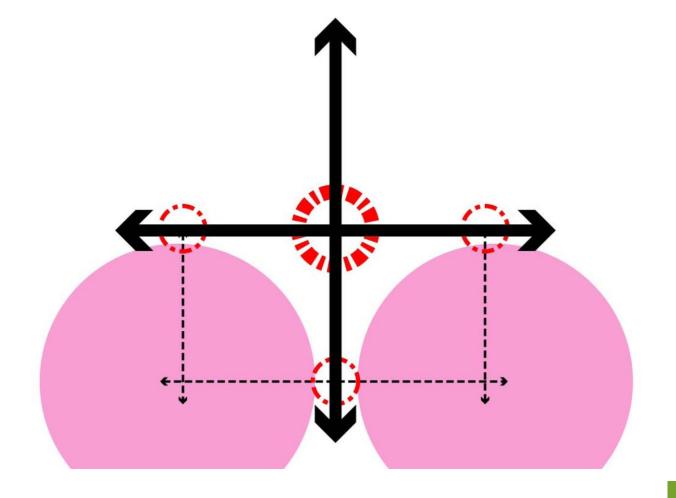
And access to development





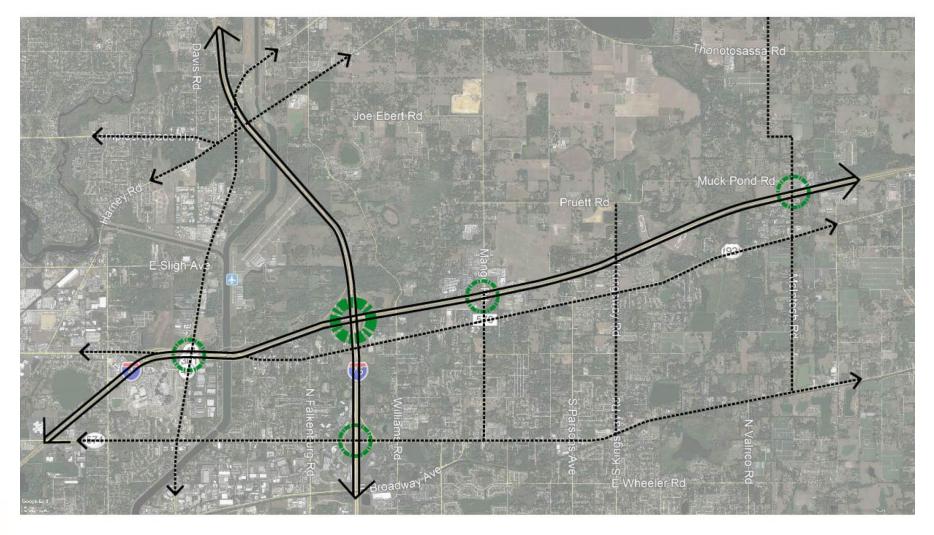
Transportation Strategy

Current access is limited



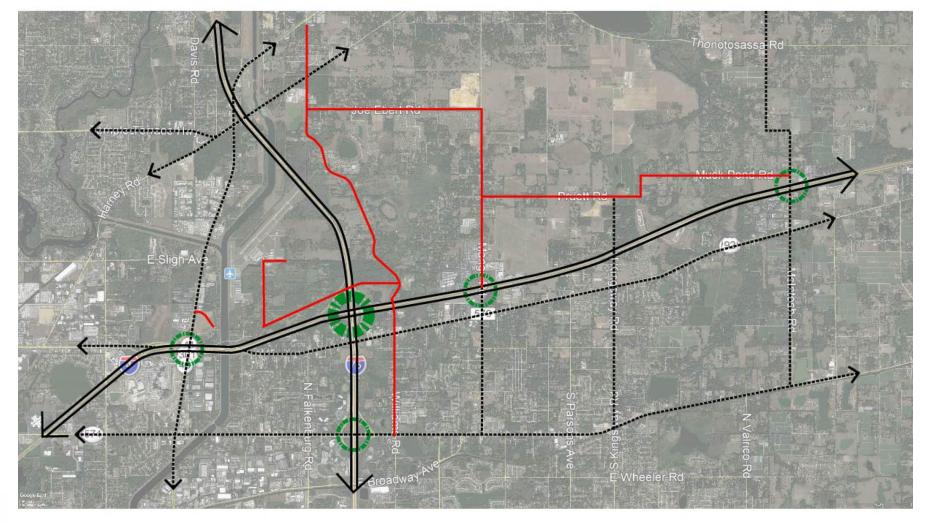


Transportation Strategy – Current Network



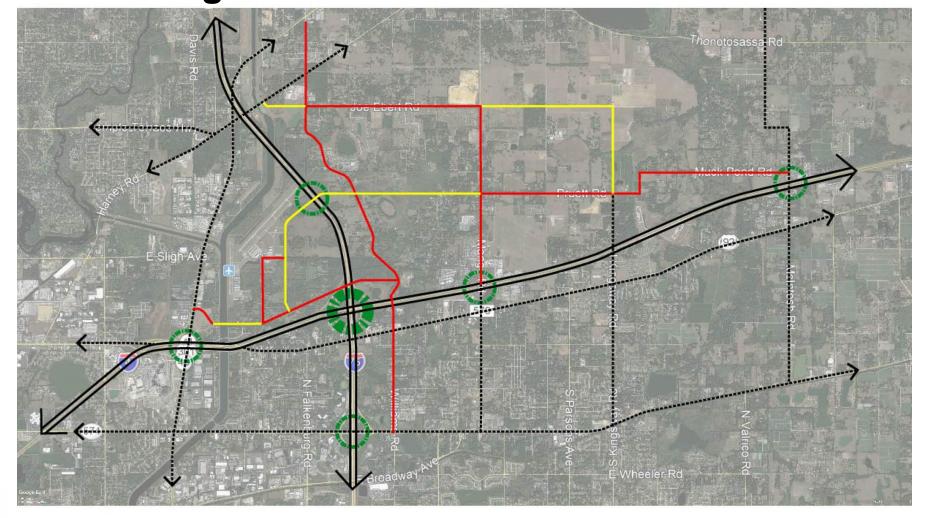


Transportation Strategy – Improve Existing Roads





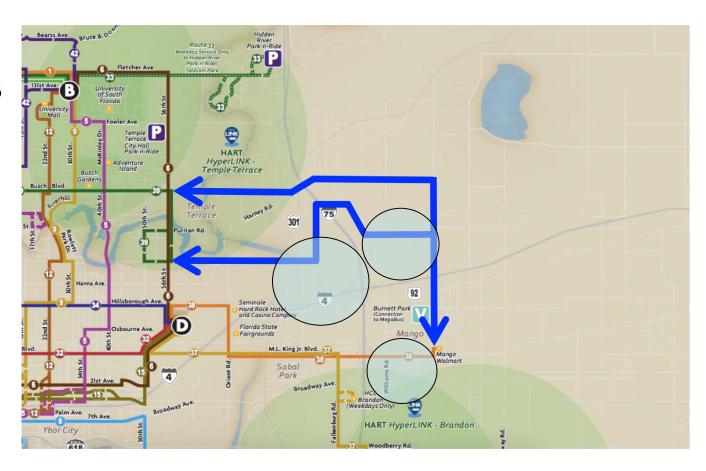
Transportation Strategy – Extend Selected Roads and Build New Interchange on I-75





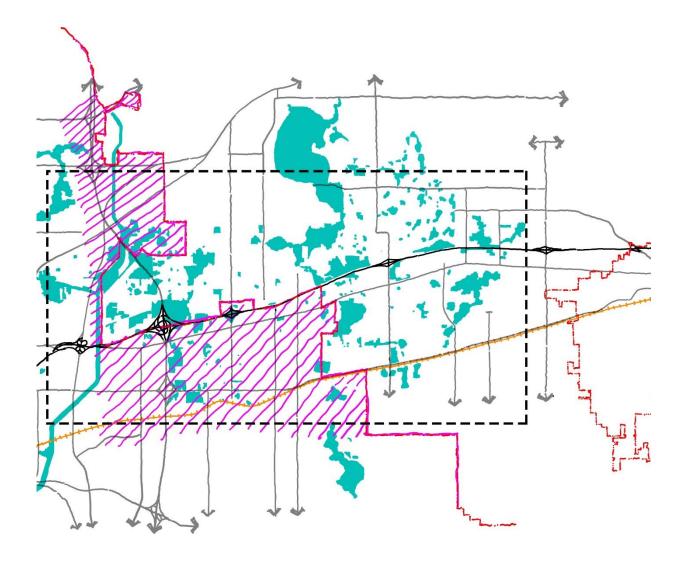
Transportation StrategyAdd Transit Service to Nodes

- Density justifies service
- Increases access to jobs
- Boosts mobility options for new and existing residents



Phase 1 – Hold the Line

- In the near- or mid- term, this is the primary approach to accommodating growth
- Consistent with 30 years of land use decision making
- BUT! This is not a NO ACTION PLAN!





A Limited Stock of Greenfield

- A limited stock of unused, greenfield land means new solutions need to be pursued
- Redevelopment and reuse of underutilized land is necessary to capture new residents and jobs





Density as Placemaking

- If done correctly, density is an asset not a liability!
- More rooftops = more amenities only possible under the right conditions
 - Grocery store
 - Higher quality Retail environments
 - Cultural institutions
 - Community spaces



Pineapple Grove, Delray Beach, FL

Source: http://www.palmbeachillustrated.com/2015/05/01/pineapple-grove-find-your-groove-in-the-grove/



Density as Placemaking



Baldwin Park, Orlando, FL



Main Street, Dunedin, FL Source: http://www.discover30a.com/30-A_Communities/rosemary-beach/



New Way of Thinking About Mobility

The existing system does not hold up



- Density creates the need for improved mobility
- It also burdens the existing system a system not meant for intense development
- Mobility must be thought about beyond the single occupancy vehicle
- The existing system will not hold up as we heard from many people!

New Way of Thinking about Mobility

Active mobility and complete streets



- Density promotes active transportation
- The County has already invested a lot of time and money into bike lanes and sidewalks
- A greater population is the key to unlocking its potential
- A great opportunities to think about complete streets

New Way of Thinking about Mobility

Transit and advanced mobility

- This approach sets the stage for transit and advanced mobility
 - Bus Rapid Transit (BRT)
 - Possibly Light Rail (LRT)
 - Autonomous Vehicles (AV)
- Transit may not be feasible today, but it can be in the future!
- The rethinking of streets must not preclude new modes of mobility



A strong economic development strategy

Places mean people, people mean jobs

- Great places attract people
- This is definitely true of the muchexalted millennial!
- Many employers look for high-quality talent
- A shift is taking place in the location of corporate campuses



An example:
Belleview
Station,
Centennial, CO





Land Values Increase – Opportunity and Challenge

OPPORTUNITY

- An intensification of the USA area will mean an increase of value inside its bounds
- Revenue generated in increased property value and taxation

CHALLENGE

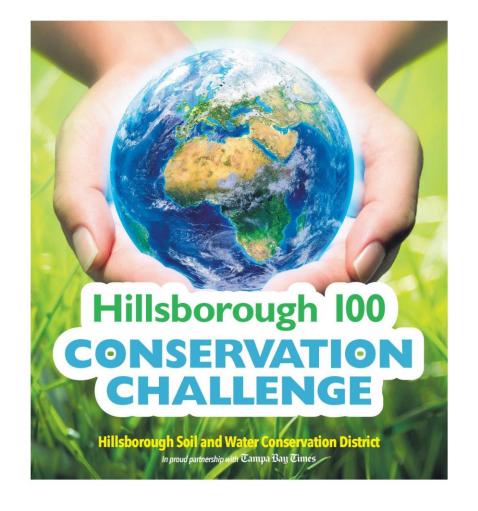
- It can also exacerbate affordability
- County must look for opportunities to maintain affordability
- A mix of densities can help provide housing options



Retrofitting Fixtures

Use Existing Water and Sewer Capacity for New Growth

- 600,000 new residents require 20,805,000,000 gallons of water per year at current usage (10B gallons of wastewater)
- Mandatory retrofit for older (pre 1994)
 homes and apartments when sold
 creates significant capacity in the
 existing Urban Service Boundary



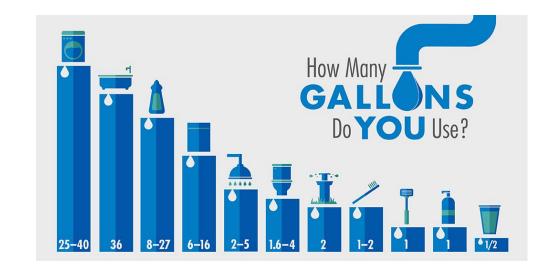


Water Usage

Use Existing Water and Sewer Capacity for New Growth

FIXTURES AND APPLIANCES SINCE 1975^a

Fixture/Appliance	Year					
	1975	1980	1992	2008	2011 ^e	2013°
Shower (gpm) ^b	3,5	2.5	2.5	2.5	2.0	2.0
Toilets (gpf) ^c	5.0	3.6	1.6	1.6	1.28	1.28
Faucets (gpm)	2.5	2.5	2.5	2.2	1.8	$1.8/1.5^{\rm f}$
Clothes washers $(gal/ft^3)^d$	15.0	15.0	15.0	8.5	6.0 ^g	6.0 ^g



- 900,000 people in 1994
- Retrofit saves at least 20 gallons per person
- 6.6 B gallons = **1/3 of new development**

You are already leading the nation!!



Development Will Not Cease Outside USA

Once again, there are pros and cons

OPPORTUNITY

- The current development patterns will continue
- This allows for the preservation of the character that is well loved in the area
 - Rural
 - Natural
 - Open

CHALLENGE

- This development pattern will tax existing infrastructure where it exists
- Long term and large scale use of septic and wells can cause problems with ground water
- Growth in this way will limit future potential of expanding USA and meeting goals





What to Do With Your Found Time

Three priorities – Over 5-8 years:

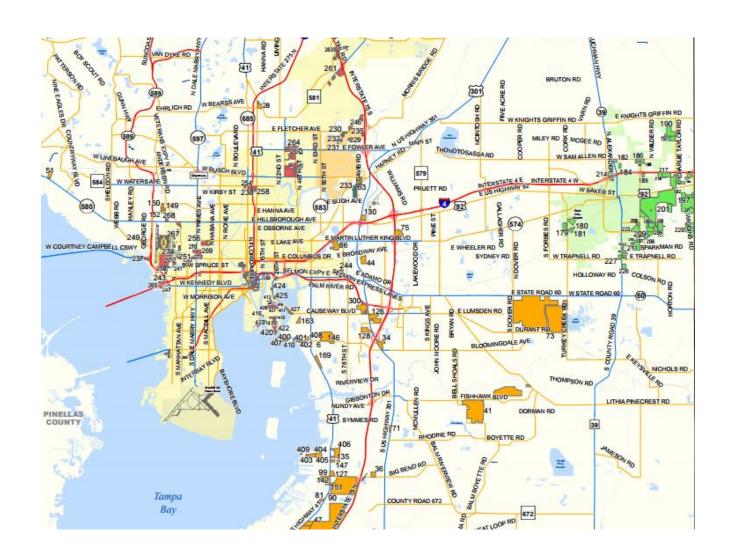
Starting now!

- 1. Find and promote redevelopment opportunities
- 2. Create a vision for expanding the USA with the community
- 3. Identify opportunities for increased revenue to fund infrastructure



Priority 1 – Find opportunities for redevelopment

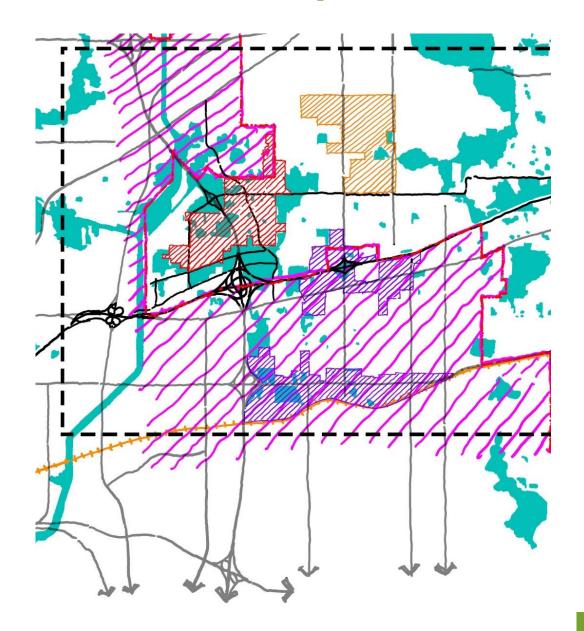
- Expand Competitive Sites program to focus on infill and redevelopment sites
- Work with property owners to promote sites that need increased attention





Priority 1 – Find Opportunities for Redevelopment

- Seffner-Mango presents a great case study for where to focus redevelopment
- Must be done in conjunction with the community and the vision of their Community Plan overlay
- Explore innovative funding opportunities like a Tax-Increment Financing district to fund infrastructure





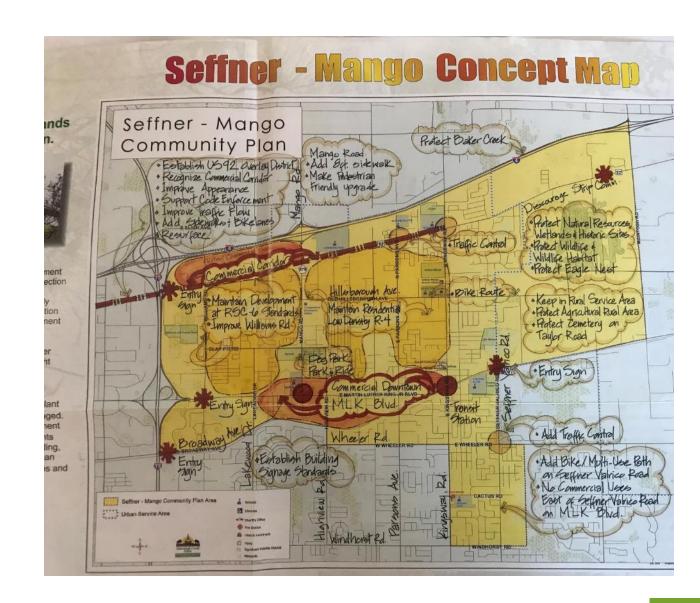
Priority 1 – Find Opportunities for Redevelopment





Priority 2 – Plan for Growth With the Community

- The timeframe allows for an engagement and planning process
- This process should produce a shared vision that meets the needs of the County and desires and goals of the residents
- Ultimately preparing for the expansion of the USA





Priority 3 – New and Existing Sources of Revenue

New Sources

- This is an opportunity to begin looking for additional revenue sources:
 - Public-Private Partnerships
 - Tax Increment Financing
 - Improvement districts

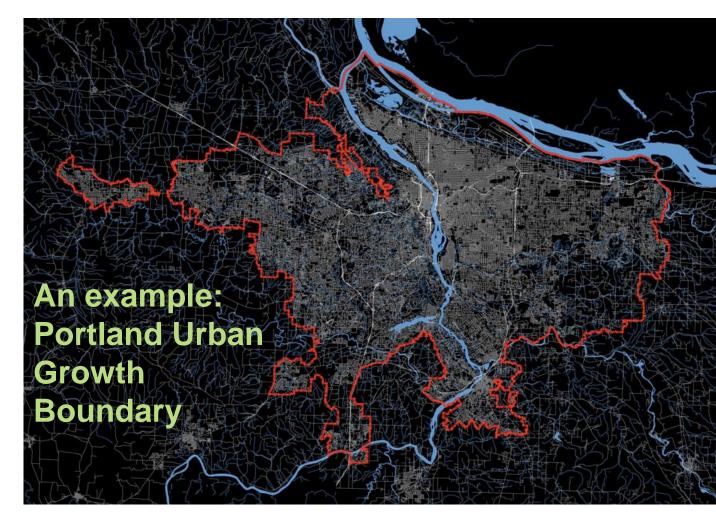
Existing Sources

- This is also an opportunity to optimize your existing sources of revenue
 - Pay for not only construction, but ongoing maintenance of infrastructure
 - Optimize tools to incent the type of development you want to create



Frequent Schedule for Review

- Reviewing the expansion of the USA should happen frequently and begin soon
- You need to defend the boundary
- When the opportunity comes, you have to be ready and have community support.





First Phase – Hold the Line - Conclusions

WHY THIS IS CRUCIAL:

- 1. It is the lowest cost option for adding people and jobs
- 2. It maximizes your previous investment in infrastructure
- 3. It promotes a sense of place that is more vibrant and competitive
- 4. It promotes sustainable development and mobility practices



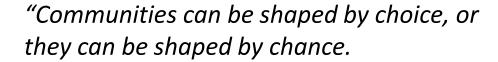
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Create the Community You Want

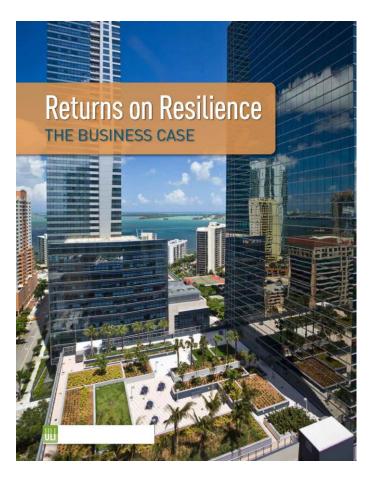
10 Principles of Resilient Communities

- 1. Understand your vulnerabilities
- 2. Strengthen job and housing choices
- 3. Promote equity
- 4. Leverage community assets
- 5. Redefine how and where to build
- 6. Build the business case
- 7. Accurately price the cost of inaction
- 8. Design with natural systems
- 9. Create co-benefits
- 10. Harness innovation and technology



We can keep on accepting the kind of communities we get or we can start creating the kind of communities we want."

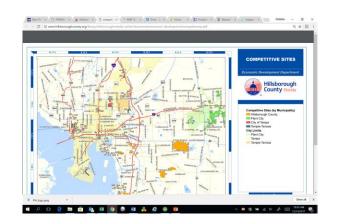
- Richard Moe





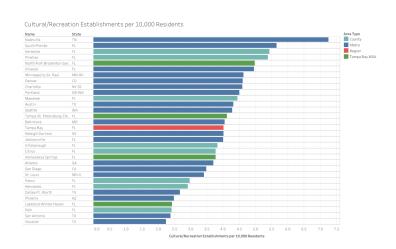
Economic Development – Countywide

- Streamline and coordinate all plans
 - Everything needs to work together
- Update USA amendment criteria
 - Tie to Comprehensive Economic Development Strategy
 - Include measurable outcomes
 - Evaluate performance
- Update the County's Comprehensive Economic Development Strategy
 - Reflect 2017 development levels
 - · Changes in site selection criteria
 - Include a specifically geographic element
- Amend Regional Competitiveness Measures
 - Track and report specific Quality of Life measures
 - Tie to the Comprehensive Economic Development Strategy











Economic Development – Study Area

- Strategic Economic Development Nodes
 - Large enough to be self-sustaining
 - Contain a critical mass
 - Attract private development partners
 - Focus on employment in the R&D and office land use types
- More effectively use existing assets
 - Access to Tampa Executive Airport and Eureka Springs
 - Hold out for desired development-type
- Phase 1 Hold the Line
 - Not the "Do Nothing" option
 - Discontinue practice of subdividing rural areas
 - Preserve larger parcels
 - Preserve existing character



Presentation Overview

- I. Introduction
- II. Economic and Market Snapshot
- III. Planning and Development Strategies
- IV. Economic Development Strategies
- V. Fiscal Impacts
- VI. Public Engagement and Regulatory Framework
- VII. Implementation
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Fiscal Implications (Or, There's No Free Lunch)

- Robbing Peter to Pay Paul
- New Development Should Pay its Own Way
- Incentivize Your Vision
- Leverage Existing Resources



Financing Mechanisms

Traditional Real Estate Development Finance Framework (It's got to make financial sense)

- Tax Increment Financing (TIF)
- Community Development Districts (CDD)
- Transportation Improvement Bonds
- Enhanced Infrastructure Financing Districts
- Active Transportation Program
- Tax Credits
- Social Impact Bonds
- Community Benefit Agreements and Programs
- Community Development Corporations/Community Development Financial Institutions
- Community Land Trusts
- Crowdfunding
- Tactical Urbanism



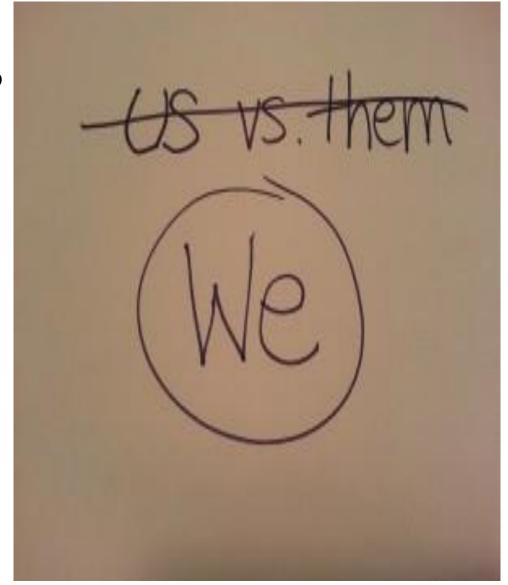
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"They" Versus "Us"

Public Engagement

- The County has made progress but needs to continue to innovate and improve outreach and engagement efforts
- The panel heard that there is a perceived lack of communication and trust between the County and residents, and within County departments themselves
- Create a uniform policy, comprised of guidelines and best practices to establish standard approaches to how you engage and communicate with your community about ALL your work.
- What people don't hear or perceive is also a message that is sent.
- The Policy, when adopted by the County, will be applied by departments, boards, committees, and commission.

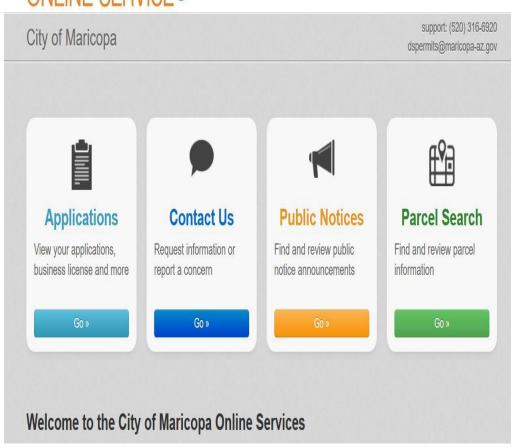


Regulatory Framework

- Consistency, Transparency, and Reliability
- Provide clear communication on the roles of the board, committees, and commission appointed by BOCC, create protocol, guidelines, and procedures.
- BOCC and the County Planning Commission hold joint quarterly or bi-annual meeting to understand and implement Comprehensive Plan and BOCC policies.
- Continue streamline planning review process and responsiveness to customers County = 45 days versus Cities = 6 days.
- Explore electronic permitting options.



Sign Up or Log In



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Key Recommendations

- Market
 - Anticipate growth that exceeds ability to accommodate with traditional density
- Planning & Development Strategies
 - Phased approach: plan then expand
 - Stick to the plan severely limit piecemeal amendments
 - Be prepared to revisit the USA limits in an orderly way, a la Portland
 - Begin with and fully utilize existing USA
 - Don't underestimate the amount of developable land you have
 - Mixed use nodal development along I-4 Corridor
 - Develop overlay for development in existing unincorporated USA
- Economic Development Strategies
 - Revise key documents and approaches
 - Make a place and the people and jobs will come
- Fiscal Impacts
 - Don't rob Peter to pay Paul
 - Explore menu of suggested finance mechanisms
- Public Engagement and Regulatory Framework
 - Make further progress and refinements to engagement and outreach efforts
 - Remember that perception is reality
 - Consistency, transparency, reliability
 - Land-use agencies and partners should convene regularly to share information



