

4

Challenges of Buildout in Pinellas County

Reflecting upon Pinellas County's local history, geography, retention of open space, existing patterns of development and governance, the County's role in the region, and upon national and global urban and economic trends helps provide different perspectives from which to evaluate the impact of buildout on Pinellas County. What follows is a discussion of the various challenges facing Pinellas County that are either directly or indirectly tied to the repercussions associated with buildout. The identification of these challenges is based on observations, research, conversations, and interviews that the Planning Department has conducted over the past few years.

Providing a Quality Environment

It is clear that residents, businesses, and local leadership must adjust, and are adjusting, to the challenges that confront Pinellas County as it emerges the first county in Florida to reach buildout. But opportunities as well as challenges present themselves; no longer having to concentrate on keeping ahead of the demands imposed by rapid growth, the County and its municipalities are able to focus more resources on improving the quality of the urban experience and the natural environment. Investing in quality (whether in the neighborhoods, in the schools, in the natural environment and public spaces, in the arts, in the local economy, in the transportation and communication systems, or in other areas of the community) will improve Pinellas County's appeal as a place to live and work. This will require building on the strengths and unique attributes of the County. At the county level, public policy is slowly shifting from a focus on massive public infrastructure programs that responded to the demands of extensive urban growth and development to a focus that includes more emphasis on protecting and promoting community character, supporting economic development, and enhancing the lives of all segments of the County's population.

Land Use Patterns

An important question that must be considered is what impact is buildout expected to have on the County's land use patterns; that is, will buildout effect changes in how land is used? Land use in Pinellas County is the result of varied forces (economic, demographic, regulatory, unique environmental issues, geography, social, and cultural) whose direction and influence can change over time. There is much interplay between these forces; for example, the regulatory influence on land use has increased over the past thirty years as interest in managing growth and protecting the natural environment have taken on more importance in our nation and our communities. As already discussed, the intense urban concentration of people indicative of older industrial cities never established a secure foothold in Pinellas County. Pinellas County grew under the influence of the automobile, which encouraged dispersion, not concentration. Revolutions in transportation and communication were dispersing urban economic functions and housing into the countryside. The resulting urban landscape is one of extensive single-family neighborhoods, localized higher density apartment and condominium complexes, office and industrial parks, strip commercial development along the highways, intensive development on most of the barrier islands, and several small downtowns and town centers. A recurring theme of this urbanization is the ever present road

network that ties it all together. Without the automobile, the urban form that evolved in Pinellas County during the Twentieth Century (and in practically every other urban county in the nation) could not be sustained. When technology afforded people the choice of living in less-crowded conditions, many people chose to live in the suburbs. It is unlikely that buildout will result in significant increases in density for the existing single-family neighborhoods. It has already been noted that the existing population density in Pinellas County is almost equal to the median density for those urban areas with populations of more than one million. With few exceptions, urban population densities since 1950 have been decreasing in the United States. Recent residential redevelopment and infill development in Pinellas County tends to support the viewpoint that the County is expected to see no significant transition to higher densities as a result of buildout. Infill residential development is occurring on individual lots and small parcels throughout the County at densities that are comparable to what is already built. In some cases, particularly on the waterfront, older homes are being torn down and replaced by much larger residential structures. In neighborhoods throughout Pinellas County, single-family homes are not being replaced by higher density uses, but are being replaced by new single-family structures. Discussions with St. Petersburg planning staff revealed that vacant lots in single-family neighborhoods in that city are being sought for constructing single-family homes and not for increased densities.

Although no significant change in dwelling unit densities are expected in the County's extensive single-family neighborhoods, the County's historic downtowns, other community focal points (e.g. Central Avenue in St. Petersburg) and portions of the beach communities, are expected to experience more intensive (re)development. However, such areas will need to be planned so that they do not adversely impact adjacent single-family neighborhoods. Consequently, Pinellas County will continue to have a relatively low overall density with areas of local concentration - providing places where people can get away from each other, and places where people can gather. The areas of concentration will provide exciting urban experiences where some people will want to live in higher density housing in close proximity to jobs, cultural attractions, restaurants, and other urban amenities, while the majority of people will continue to choose to live in single-family neighborhoods. This land use pattern will provide a range of choices in housing and urban environments in a small county where quality services, employment, education, cultural opportunities, and recreational facilities are close at hand.

As noted earlier, development in Pinellas County after World War II followed a pattern in which the buildings where people shop, work and obtain services were primarily located along the County's major roadways. This development pattern has resulted in extensive linear commercial corridors where the primary orientation is toward the roadway, providing easy accessibility for the automobile. The businesses and transactions that go on in the numerous shopping centers, office buildings, and manufacturing facilities contained within these corridors represent a significant portion of the local economy. It is evident over time, however, that portions of these commercial corridors have become obsolete due to changes in demographics, shopping patterns, and the road network itself. For example, Sunshine Mall was opened in the 1960s in the City of Clearwater as the County's first enclosed mall, but by the mid-1990s Sunshine Mall was largely empty as a result of stiff competition from newer regional malls and changes in the retail marketplace. Today, three large apartment complexes have replaced the mall and provide rental housing in a section of Clearwater that had seen little housing development in recent years. In this situation, the City of Clearwater was able to work with the developer in replacing an obsolete structure with completely new uses and

buildings in an older portion of the City. This successful conversion should do much to revitalize this area of the City. There are many other areas within the County's commercial corridors that have not been so fortunate and continue to experience disinvestment and deterioration for a number of reasons. In some cases, the preference of drug stores and supermarkets for large standalone structures has left numerous shopping centers without major tenants. In other cases, shoppers abandon commercial corridors as they look elsewhere for goods and services. The results are underutilized properties and a distressed appearance that can have a negative impact on the surrounding community and the local economy.

One benefit of buildout may be that the limited amount of vacant land within Pinellas County will provide an incentive to redevelop and revitalize these stressed commercial properties and corridors. For example, the desire for additional manufacturing space prompted Pinellas County and the cities of Clearwater and St. Petersburg to allow light manufacturing uses within commercial corridors on a case-by-case basis. This flexibility resulted in some abandoned commercial properties being converted to light manufacturing use (e.g. the former Costco building located at Klosterman Road and U.S. Highway 19), bringing jobs closer to employees and diversifying the local economy by adding manufacturing jobs. But this is only one response. Pinellas County and its municipalities must take a thorough look at these commercial corridors to ensure that they are able to successfully adapt to the ever changing demands of the community and the marketplace.

Strong and Vital Neighborhoods

One urban thinker claims, rightly so, that neighborhoods are the lifeblood of the city, or any urban area.¹ Local governments throughout Pinellas County have recognized the importance of strong and vital neighborhoods in creating places where people want to stay and invest their lives. Until recently, much of the attention in Pinellas County had been focused on the development of new residential communities as growth expanded over the countryside. The rapid development of new housing at times resulted in the neglect of older residential areas that were usually clustered around the historic downtowns and older town centers that existed before World War II. But as cities, and now the County, run out of large tracts of vacant land for residential development, interest in older communities is rekindled. This renewed interest in older neighborhoods, at times encouraged by public investment, occurred first in St. Petersburg where the population stabilized at around 245,000 in the 1980s. To find new housing, people and families were having to move to north Pinellas or adjacent counties. But if the jobs were in downtown St. Petersburg or the mid-county Gateway Area, leaving St. Petersburg in search of new housing often meant longer commutes and more time on the road. As an alternative, people began to invest in the older, close-in neighborhoods near downtown St. Petersburg causing them to evolve in several important ways. One example of this evolution has been the change in demographics as younger families move into neighborhoods once primarily the province of the elderly. This change in demographics has had ripple effects throughout the neighborhoods – e.g. increased demand for active recreational facilities, and the need for additional class space in an area of the County that is experiencing little population growth overall. More evidence that these communities are evolving is found in the restoration of older homes and a reduction in the number of vacant and boarded up homes. In fact, it has been emphasized by those involved in revitalization efforts that a successful neighborhood will look good. The presence of trash, unkempt properties,

vacant and boarded up homes are interpreted as unmistakable signs that people do not care about their community, which in turn is a disincentive for people to invest in that area.

The rest of Pinellas County has quickly caught up to where St. Petersburg was a few years ago in that it will soon be difficult to find new housing without having to travel to less developed areas outside of the County's borders. But the renewed interest in older neighborhoods and communities has more behind it than the basic need for housing. These older areas with narrow tree-lined streets, sidewalks, a variety of housing options and styles, and in some cases historic structures, exude a sense of character that is often lacking in the newer subdivisions. Even more important, their pedestrian scale based on an urban design model that predated the dominance of the automobile promotes among residents a sense of community. The challenge facing Pinellas County is not only preserving, restoring and renewing older neighborhoods, but also remaking and humanizing the rush of post-World War II subdivisions that blanket much of Pinellas County. Even the simple addition of sidewalks can serve as a cohesive factor to bring the community together. For example, it has been argued that the ability of the Pinellas Trail to link isolated subdivisions may help explain its popularity.

It is important to remember that the needs and desires of people and families change over time, and that what was preferred in neighborhoods during the 1950s, 1960s, and 1970s may be found lacking in important ways at the turn of the century. With no room to build new communities, it is important that existing neighborhoods have the flexibility to adapt to the needs of modern homeowners and renters. The older, pedestrian-scale areas are exhibiting a remarkable adaptability to changes in social circumstances as evidenced by their rejuvenation more than 50 years after their establishment. A greater challenge facing Pinellas County and its municipalities is going to be ensuring that as the post-World War II subdivisions, condominiums, and apartment complexes age that they too can successfully adapt to the changing needs of the renter and homebuyer. The characteristics that distinguish these communities – uniform housing types, oriented toward the needs of the automobile rather than the pedestrian, often disconnected from surrounding neighborhoods by cul-de-sacs and walls – may require different approaches to what has worked in rejuvenating communities created in the first half of the Twentieth Century. One common characteristic of most post-World War II subdivisions is that they are composed solely of private dwellings and lack shared public spaces where citizens can feel that they are part of a larger community. As a result, efforts have been taken or are underway throughout Pinellas County to create, or reestablish, public spaces in local communities – whether they are linear trails, parks, natural areas, and recreational facilities, town centers, or even the humble sidewalk. These efforts should continue to be encouraged and supported.

Renaissance of Urban and Town Centers

Cities, towns, and unincorporated communities throughout Pinellas County are restoring their historic downtowns or “main streets”. In a few cases, communities are even creating such places where none existed before. What explains this interest, commitment, and investment (both public and private) in areas that had fallen on hard times after businesses had gravitated to locations along the major road corridors and to the regional malls? One answer, though by no means the complete answer, is that residents and visitors to Pinellas County and its cities are looking for places that help to define a community, that provide a place where the community can gather informally and also traverse easily and safely on foot or bicycle. It is no

accident that these places are being created by recycling the earliest centers of the numerous settlements that sprang up around Pinellas County. **Figure 9** shows the location of these local efforts to create community focal points; it looks very similar to a prior map (**Figure 1**) except that the railroad has been replaced by the Fred Marquis Pinellas Trail. While similar efforts are occurring in counties around the country, the dispersed historic settlement pattern in Pinellas provided the opportunity for recreating numerous, distinct local “main streets” and downtowns throughout the County - and that is what is happening. Simultaneous efforts are underway in St. Petersburg, Clearwater, Gulfport, St. Pete Beach, Madeira Beach, Seminole, Pinellas Park, Largo, Indian Shores, Indian Rocks Beach, Safety Harbor, Dunedin, Oldsmar, Tarpon Springs, and Downtown Palm Harbor in unincorporated Pinellas County. Local communities can learn and benefit from each other as these areas redevelop.

These ongoing efforts to create, or recreate, a lively and dynamic downtown, main street, or town center often include developing a plan that takes a comprehensive look at how to revitalize the area. Such plans usually include residential uses as well as commercial, office, and institutional uses. The redevelopment programs in St. Petersburg and Dunedin have resulted in the construction of new multi-family and attached single-family townhouse projects while plans are underway for similar higher density residential development in downtown Clearwater and downtown Largo. These revitalized urban areas create a conducive environment for the type of residential development where services and amenities are often within walking distance. They become areas of concentration within a county of mostly lower density single-family residential neighborhoods. Such areas are important to the livability of Pinellas County in that they provide the vibrant places (whether large downtowns such as St. Petersburg or smaller community commercial centers such as Downtown Palm Harbor) where urban life is experienced first-hand on foot. For a large county of roughly 948,000 people, there is a desire for a sense of local identity, for creating places where people can share experiences on a smaller, human scale.

FIGURE 9
Downtown Redevelopment & Florida Main Street Programs
In Pinellas County, Florida 2001

Matching Development with Natural Resource and Infrastructure Constraints

Long-term infrastructure planning and decision-making in Pinellas County has been largely based on the future land use pattern as depicted on both County and municipal future land use maps, and on the countywide Future Land Use Plan. This future land use pattern has not changed substantially since the early 1980s when the Board of County Commissioners made several significant policy decisions that would affect the ultimate buildout of the County. For example, a significant decision was made by the Board of County Commissioners to reduce residential densities on the future land use map for much of the unincorporated area, reflecting the Board's increasing sensitivity to the cumulative and often detrimental impact of development on the County's natural resources. This was largely based on the results of a multi-jurisdictional planning initiative undertaken by Pinellas County and the local municipalities in the late 1970s to delineate all of the environmentally sensitive lands within Pinellas County. Based on this information, local governments in Pinellas County set aside as preservation lands much of the most environmentally sensitive land in the County. And as the County had done, several of the municipalities also reduced residential densities on their future land use maps in order to protect the important natural resources within their jurisdiction. As much as possible, the County's efforts have been designed to achieve multiple objectives. For example, in setting aside the preservation lands in north County, and by reducing development densities, the County set about to protect a major wellfield recharge area, to protect a sizable portion of undeveloped native Pinellas habitat from development, and to preserve existing natural floodways for flood protection and storage capability.

This was the beginning of a new era for the County, with environmental protection taking an increasingly important role in the Board's development review, long range planning and land management programs. The citizens of the County were important partners with the County in this long range planning process as they consistently approved the countywide referenda presented to them by the Board, beginning as early as 1972, to tax themselves for environmental land purchases. Today, the County continues to benefit from the groundwork laid in the late 1970s and early 1980s. The fact that much of the 25-year floodplain in the unincorporated area is now protected from development supports Federal Emergency Management Agency goals and supports County participation in programs to reduce flood insurance rates for home and business owners. The protected floodways, coupled with the extensive amount of environmental lands purchased and managed by the County, the municipalities, and other governments and agencies since the late 1970s allows Pinellas County to boast an internationally recognized passive park, preserve and greenway system. Public projects are now routinely accomplished to achieve multiple objectives, with the Boca Ciega Millennium Park providing a prime example. Here, the County has acquired and is managing 185 acres of natural lands to support environmental protection and restoration goals, to support standards for the provision of passive parklands to the public, and to enable a major stormwater retrofit project providing water quality treatment to runoff from the surrounding development.

Overall, while Pinellas County remains an urban county, much land has been set aside to provide open space relief from our developed corridors and to support and recognize the County's commitment to environmental purposes and needs.

To complement planning for environmental purposes, development needed to be directed to those areas where infrastructure could be planned and provided to accommodate anticipated

growth. For example, also in the early 1980s, the Board of County Commissioners made a decision to establish the mid-county Gateway Area as a major employment center. Today, the Gateway Area is a major focus of economic development efforts in the County and considerable planning has gone into providing the infrastructure needed to support this development.

Overall, the fact that since the 1980s the County has experienced a largely stable land use pattern has resulted in a consistent foundation for long range infrastructure and resource planning in Pinellas County.

Long range planning for the provision of potable water supply and wastewater collection, treatment, and disposal facilities has been based on meeting the demand associated with this future land use pattern. The same is true for the design of major drainage systems throughout the County. This long-term planning has guided the County's decisions about where to locate facilities and how big they should be to meet ultimate demand. For potable water resource and facility needs, in particular, the projected demand associated with buildout has regional implications due to the County's reliance on regional sources and our participation in Tampa Bay Water – a regional water utility.

The need for parkland and recreation facilities is in some measure circumscribed by the residential development anticipated at buildout. To the extent the population at buildout can be anticipated accurately, local governments have a better grasp on the future need for parks and recreation facilities and programs.

Significant planning and expenditures have gone into developing the organizational framework and the infrastructure to support the future vision of the County as depicted on the local and countywide future land use plans. Dramatic changes to this land use pattern would necessarily have to contend with a variety of political, environmental and financial implications. With potable water supply, for example, there are natural, economic, and political constraints on the development of water resources for potable supply. Land use decisions (either individually or cumulatively) that result in significant increases in potable water demand would require planning for additional facilities, and possibly new sources, by the regional water supplier - Tampa Bay Water.

Just as important, increases in residential densities, particularly if those increases were to occur in our most hazardous coastal areas, would exacerbate the County's emergency sheltering and evacuation situation. There is a deficit of emergency shelter spaces in Pinellas County, and existing development and the peninsular nature of the County make it difficult to solve the evacuation capacity problems on our major evacuation routes. Therefore, it would appear to be poor public policy to support or encourage major changes in land use that would contribute to this existing problem.

Protecting and Restoring Pinellas County's Natural Heritage

It could be argued that the cornerstone to the County's quality of life is its peninsular location, subtropical climate, and rich natural heritage. But by the late 1960s and early 1970s, little was left of the original landscape and vegetation that first distinguished the peninsula. Prior to the 1970s, the voices calling for protection of the natural environment were too often overshadowed by pressure to develop the peninsula. As a result, the natural environment was

often sacrificed to the demands of growth. Beginning in the late 1960s, however, a concern about the health of the natural environment was beginning to sweep the nation. Books like Silent Spring by Rachel Carson and nationwide events like Earth Day galvanized people across the country to take steps to protect the nation's natural heritage. Locally, in the late 1960s, residents of the County were becoming organized in their concern over a major environmental issue - the dredging and incremental destruction of Boca Ciega Bay. As a result of this citizen activism and the organized effort to bring attention to environmental protection needs, special legislation prohibiting dredging in Boca Ciega Bay was enacted. Pinellas County was now responding in several ways to this cultural shift directed at concern for the environment. For example, the Red Flag Charrette was a landmark document published in 1972 following a County initiative that brought together governments, environmental interests, architects, planners and private citizens to identify and prioritize environmental lands throughout the County for protection, potential acquisition and environmental management. As an outgrowth of the Charette, in 1972 the citizens of Pinellas County supported the first referendum (of several) presented to them by the Board to increase ad valorem taxes to purchase parkland and environmentally-sensitive land. In 1974, the Board established the Pinellas County Department of Environmental Management, for the first time employing a full staff of environmental professionals. All of these significant events occurred within the three years from 1972 to 1974.

Since then, the Board of County Commissioners, frequently in partnership with the State of Florida and the Southwest Florida Water Management District, have acquired large expanses of native Florida habitat in north Pinellas County, undeveloped barrier islands along the Gulf coast – including Shell Key, Weedon Island properties and nearby wetland areas on Tampa Bay, as well as many smaller natural areas elsewhere. In addition, an exceptional system of passive regional parks and greenways is provided by the County to residents and visitors alike. These important open space areas are constantly being expanded and managed to enhance opportunities for the public to enjoy the out-of-doors, and, within the natural preserves, to experience the natural landscape and environment of Pinellas County. When these natural areas and open spaces are combined with the many parks and natural lands properties owned and managed by the municipal governments, and with privately-owned recreational facilities, the resulting overall open space network is shown in **Figure 2**. This network covers roughly one-fifth of the County, yet only begins to hint at what Pinellas County would have looked like if more attention had been paid in earlier decades to designing and building its communities in harmony with the natural landscape as advocated by John Nolen in 1923.

Mr. Nolen was an influential city planner during the early decades of the Twentieth Century whose pioneering work had considerable impact on this relatively new discipline. In the 1923 regional plan for Pinellas County and in the 1923 comprehensive plan for St. Petersburg, Nolen and his firm proposed preserving flood-prone wetlands and creating a system of interconnected parks and nature preserves. In Nolen's plan for St. Petersburg, parkways and landscaped boulevards were also included. Implementation of this plan would have allowed the urban and natural landscapes to mesh gracefully. Instead much of the subsequent urbanization throughout the County took place at the expense of the natural environment.ⁱⁱ

The efforts that started in the 1970s to “naturalize” the County’s urban environment continue today and are exemplified by County and municipal programs to acquire open space and environmental lands, through the recent establishment of the County’s Division of Environmental Land Management, through capital commitments to landscaping road corridors,

through programs directed at ongoing parkland acquisition and development, through capital commitments and programs for the management and restoration of degraded natural habitats, through innovative land development regulations intended to protect natural areas from inappropriate development activity, through commitments to a network of connected recreational and environmental greenways - helping to link natural systems and neighborhoods, and through County and municipal commitments to interpretive environmental education activities promoting environmental stewardship. Today, significant amounts of local and State-awarded funding are directed towards protecting and restoring Pinellas County's rich natural heritage. In fact, working hard to overcome what was allowed to occur in the past, Pinellas County has become a recognized environmental leader and innovator, in partnership with the surrounding municipalities.

An ongoing commitment remains necessary to continue making progress on the protection and restoration of the County's natural environment, and to reestablish cooling greenery in areas where it was extinguished years ago. The local government programs to landscape road corridors hold considerable promise in "naturalizing" urban areas since residents and visitors regularly travel these corridors. Trees and other vegetation have a tremendous ability to soften and bring character to the repetitious, bland, and often ugly landscapes along our roadways.

Housing

One of the potential repercussions from achieving buildout is that the cost of housing will escalate leaving segments of the population behind in their ability to afford adequate housing. In the fourth quarter of 2007, the National Association of Home Builders ranked 220 metro areas in the United States according to the affordability of their housing markets. The Tampa-St. Petersburg-Clearwater Metropolitan area placed in the middle of the rankings with 48.2 percent of the homes sold during that quarter that could be afforded by a median income household in the metro area. This compares with a ranking of 71.4 percent in the fourth quarter of 1998. Other Florida metro areas varied significantly, with 67.6 percent of homes considered affordable in the Pensacola area, and 23.6 percent and 13.6 percent in the Naples and Miami areas, respectively. The least affordable housing markets were located on the west coast of the country, particularly in California, New Jersey and New York metropolitan areas.ⁱⁱⁱ

While the current housing market is relatively affordable to most segments of the population, housing information compiled by the Pinellas County Planning Department since 1990 highlights the fact that practically all of the new housing is out of reach for very low, low, and even moderate income households. For example, in 2005 the median sale price of new single-family housing in Pinellas County was \$356,400, compared with a median price of \$168,550 in 1999, and the figure for new condominium units in 2005 was \$418,600, compared with \$145,500 in 1999. The median sale price for existing housing was \$200,000 in 2005 and \$89,500 in 1999 for single-family homes and \$156,000 in 2005 for condominium units, compared with \$67,000 in 1999 – approximately half the median cost of new housing.^{iv} Fortunately, there is still some new housing that is still affordable to most median income households in Pinellas County, but for many low and moderate income households, buying a new home is generally not an option; they must restrict their search to the existing housing market.^v As the number of new housing units coming on the market in Pinellas County continues to decline as vacant developable land becomes increasingly scarce, the demand for existing homes is likely to go up as long as Pinellas remains an attractive place to live. This

would put upward pressure on existing home prices, further restricting the housing options for low income, and perhaps some moderate income, households. Yet, if Pinellas County is to flourish in the coming decades, local governments and housing providers must remain vigilant to ensure that all segments of the population can find adequate and affordable housing within the County. Companies wishing to expand operations in the County, or to relocate here, will want to know that all of their employees can find housing within a reasonable distance of the workplace. A full range of housing affordable to all income groups needs to be provided, from upscale homes for the executives to more modest housing for the majority of the employees.

Those agencies and private companies engaged in providing infill housing affordable to low and moderate income households face many challenges. Sometimes success is based on forging public-private partnerships, at other times it is based on a private company developing a strategy that responds to the unique demands of constructing infill affordable housing. But even projects that are not directly subsidized by the public can benefit from local government infrastructure investments such as paving roads and putting in curbs and gutters. One way to build less expensive homes is to build them smaller. The same quality materials and techniques used in larger homes can be used, but the smaller size lowers the cost of the home. Homes have increased in size over the years such that the median size of a new single-family home in 2005 (2,147 square feet) was considerably larger than the 1,363 square feet found in the typical existing single-family home in the resale market. A similar disparity exists between new and existing condominium units. Well-designed and constructed smaller homes, however, have several advantages: they are cheaper to heat and cool, they are cheaper to construct, and they can be placed on smaller lots. Since land is a major component of the expense of constructing a home in Pinellas County, reducing the lot size should reduce the price. There are older platted areas in the County that contain small lots, which provide opportunities for constructing smaller, less expensive, but well-constructed homes.

At the same time that limited numbers of new homes are being constructed for low and moderate income households, market forces are working to reduce the number of existing units affordable to these same households. One example is the impact buildout is having on mobile homes. Mobile homes represent an affordable housing option for tens of thousands of permanent and seasonal residents in Pinellas County. Pinellas County has traditionally had a large number of manufactured homes in its housing stock. In light of the increasing numbers of retirees on fixed incomes coming into the area in the 70's and 80's, manufactured home communities began to become a dominant force in the local housing market, comprising approximately 10% of the housing stock in Pinellas County. The majority of manufactured home parks have a single owner, with each individual in the community renting a lot for the home they have purchased. This system allowed for those on a fixed income, including the retired, to enjoy the feeling of home-ownership at an affordable rate. In the 1950s, 60s, and 70s, mobile home parks were often built along roadways that have subsequently been upgraded to major multi-lane facilities. During these decades, several mobile home communities were also constructed at choice waterfront locations.

As the value of the land in Pinellas County becomes more expensive, manufactured home park owners feel pressure to sell their land, thereby forcing all of the lot-renting home-owners to leave the site. These residents often live in homes built prior to the 1994 strengthening of the HUD Code which regulates manufactured housing building standards, and are unable to move their homes as it is often difficult, if not virtually impossible, to find a new community that

will accept the older homes. Since 2003, Pinellas County has seen a total of 38 manufactured home parks be redeveloped into other uses. These parks include approximately 5,118 units of affordable housing, as of April 2008. These numbers present an alarming issue for Pinellas County. Many of these communities will be redeveloped into townhome and condominium housing developments. Such developments are often not affordable to those who are losing their homes to the redevelopment. This is an issue that has drawn the attention of the Pinellas County Board of County Commissioners. In response, the Board has concluded an effort to determine what options are available to the County for ensuring that redevelopment projects are not injurious to the lives of mobile home residents. Pinellas County has also set in motion a program to monitor the annual loss of mobile homes to get some indication of the significance of mobile home losses on the County's housing stock, and has approved the Mobile Home Transition Program, to help mobile homeowners secure affordable housing when their communities are rezoned for another use.

In the third quarter of 2007, a survey conducted by the Bay Area Apartment Associates revealed an overall vacancy rate of five percent among the major apartment rental complexes throughout Pinellas County.^{vi} A similar survey in 1999 produced comparable results showing an overall vacancy rate of just less than four percent, while the first quarter of 2006 showed a vacancy rate of less than 2 percent. These consistently low vacancy rates are evidence of pent-up demand for new rental apartments. The impending buildout of Pinellas County, however, has resulted in very few sites remaining available for multi-family development. This tension between demand and site availability for multi-family housing is having several results: for example, much of the new multi-family housing is higher-end development, and residential developers are beginning to compete with office and retail developers for redevelopment of obsolete buildings that have favorable location, zoning, and impact fee credits.^{vii}

Mobility

Mobility and accessibility have played crucial roles in the urban growth of Pinellas County. It was the extension of railroads to the peninsula in the late 19th Century that made the area accessible and stimulated an interest in urban development that continues to this day. It was the railroad that tied the numerous small villages, towns, and cities together; today that function is performed by an extensive road network. Pinellas County, the State of Florida, the federal government, and, to a lesser extent, the municipalities continue to expend considerable resources in expanding, upgrading, and maintaining this road network. From 1990 to 1999, approximately \$387.8 million dollars were invested by just the County's road program, and an additional \$301.3 million is planned through the Year 2010. When the federal, state, and municipal road programs are added, the total financial commitment is considerable. Much of the County's road program during the 1990s was funded by the Penny for Pinellas infrastructure sales tax, and the resulting road improvements were in large measure an effort to catch up with the transportation demands resulting from prior land development.

But the need to move people and goods within the County is only one variable in the urban equation. Residents are increasingly speaking out when they perceive that transportation improvements would adversely affect the livability of their neighborhoods. Those amenities and characteristics that distinguish a community (e.g. tree-lined avenues, narrow, pedestrian-scale streets) can be lost or severely compromised if road projects are not planned and designed to protect and, when possible, enhance these community characteristics. If, as said

earlier, neighborhoods are the lifeblood of cities, then actions that debilitate neighborhoods should be avoided.

A change in perspective is slowly occurring in highway planning and design. No longer is the focus restricted to the movement of traffic as quickly and efficiently as funds allow. In some situations, these objectives may still take precedence, but in an increasing number of situations, the complex interrelationship between the road and the surrounding community is also being considered. Roads must fit into and support the overall goals for the community, whether that be historic and/or community preservation, the revitalization of downtown, providing a safe, pedestrian-friendly environment, or preserving the natural environment. These additional objectives for road projects have resulted in changes to the County's road program and have altered original plans for certain road corridors. For example, the Board of County Commissioners has committed approximately \$12 million through 2010 to landscape major portions of the County's roadway network. Roads can and should be attractive as well as functional. Pinellas County has also modified some road projects in response to neighborhood opposition; in some cases the planned road improvements have been scaled back to be compatible with the surrounding community, in other cases the road project was dropped altogether. Expansion of the County's scenic/non-commercial corridor program is one more way to help ensure that selected roadways remain compatible with the surrounding community; in 1999, the Board of County Commissioners designated an additional three roadways as scenic/non-commercial corridors. Their locations in south, mid-, and north Pinellas reveal the broad based interest in this issue throughout the County (see **Figure 5**).

A further change in road planning is that roads are no longer designed solely for the automobile. The routine inclusion of bike lanes and sidewalks helps to ensure that other modes of travel are encouraged and provided for. As Pinellas County achieves buildout and must rely upon established neighborhoods to entice people and businesses to stay in the County, effective integration of the roadway network into the community will further enhance the County's livability and reputation as a quality urban environment.

If historic trends are an accurate indication, as population growth in Pinellas County slows over the next few years, the growth in demand on the transportation system will not decrease proportionately. Travel demand in Pinellas County has largely paralleled the slow-growth trend in the County for the past 8-10 years. A combination of factors yields these results: for example, as the road network is improved, people tend to drive more; as Pinellas urbanizes, those wanting less expensive new homes or very large lots move to adjacent counties and commute to their jobs in Pinellas. For most of the Twentieth Century, Pinellas County relied almost solely on the automobile for mobility. By the end of the Century, private automobiles accounted for roughly 99 percent of all trips within the County. However, ridership on the Pinellas Suncoast Transit Authority (the County's public transit bus system) has risen steadily in recent years and rose to a record high of over 11 million in FY 2005/06. However, only 1.7 percent of workers in Pinellas County are using PSTA services to get to and from their job sites. To encourage more commuters to utilize the bus, PSTA has been aggressively pursuing new and/or enhanced express route service to expedite travel times for this market. The exception to this stable travel demand has been with inter-county facilities. Between 1990 and 2000, average daily traffic on these major roadways connecting Pinellas to Pasco, Hillsborough and Manatee counties has increased no less than 16 percent, while the combined average increase on them was 30 percent.

In looking at the future of transportation in Pinellas, community leaders have to adapt transportation solutions to an urbanized county that has relied on the automobile for mobility, enabling establishment of a low-density land use pattern served by highway commercial development throughout most of the County. Some of the most vexing transportation problems arise when a roadway corridor is expected to serve several functions, such as U.S. Highway 19. U.S. Highway 19 serves not only as the main north-south transportation corridor for inter-county travel, but it is also an economic engine of considerable importance for north Pinellas County. Thirty nine percent of all jobs in Pinellas County north of S.R. 580 are associated with businesses located along U.S. Highway 19, and almost fifty percent of all commercial jobs in north Pinellas County are found here.^{viii} This concentration of economic activity is partly the result of a policy decision by the Board of County Commissioners in the late 1970s to restrain commercial activity within the numerous residential subdivisions that were replacing the area's citrus groves, and to encourage it to occur along U.S. Highway 19. As a result, retail, office, and even industrial employment centers created a linear economic corridor along U.S. Highway 19 in response to the good accessibility provided by this highway and the policy support provided by the County's growth management plan. But the transportation needs of shoppers, adjacent businesses, commuters, and through traffic are often at odds. Shoppers making short trips to the grocery store or dry cleaners interfere with commuters and freight-carrying trucks that are using the highway to reach more distant destinations. The issues surrounding U.S. Highway 19 highlight how difficult it is for a highway to provide conflicting functions. It is likely that solutions will result not only in redesign of the highway, but in changes to the adjacent land use pattern. The proposed grade-separated interchanges at major intersections and the construction of service roads will impair the visibility of some properties from the highway. The accessibility of these properties, however, may actually be improved by the interchanges, making them ideal locations for land uses that require ready access to U.S. Highway 19, but are not as dependent on having good visibility from the highway.

Will providing alternative modes of travel other than the existing bus system reduce the County's heavy reliance on the automobile for getting around? Nationwide, cities have been relying more on the automobile and less and less on mass transit, a trend that has been the topic of much debate recently and one that many cities are actively trying to reverse. There are several reasons for this, and it is not the purpose of this report to discuss them in detail. The Pinellas County Metropolitan Planning Organization is currently evaluating different public mass transit alternatives to the automobile. The alternatives include an elevated guideway system and light rail at ground level. These systems are very expensive and any decision to proceed with one or both of these alternative technologies must compare the cost with the benefits to the overall transportation system in the County. Pinellas County is also identified as the western terminus for the State's high speed rail system. High speed rail would connect Pinellas County with other major destinations in west, central, and southeast Florida. It is not possible for public transit to provide the flexibility, convenience, and choice afforded by the private automobile. This choice includes decisions on how and where people live – often in lower density housing in single-family neighborhoods. The anticipated growth pattern in Pinellas County following buildout is not expected to significantly increase overall population densities, which will continue to challenge those responsible for providing mass transit services.

A strong case can be made that Pinellas County would do well to surmount the obstacles to improving and expanding mass transit service to residents and businesses. Actual and perceived problems in getting around in Pinellas County can have a substantial impact on the desirability of the peninsula as a place of residence and business. Providing viable options to the automobile as the almost sole means of moving people in the County will require rethinking the prevailing relationship between home, work, services, and other everyday activities and the way that the land use pattern and transportation system tie them together. One oft repeated dictum is that higher densities and more intense employment centers are necessary to support mass transit alternatives to the automobile. If true, then what would be the extent and location of these higher densities and more intensive land uses, since they come with the cost of providing more schools, recreation facilities, potable water, and sewer treatment facilities in a county where land for these purposes is in short supply? As in all complex systems - and a modern urban environment is extremely complex - changes instituted to achieve one objective or resolve a specific problem can have numerous consequences – good and bad, intended or unintended.

Pinellas County has been a leader in the development of bicycle and pedestrian trails in an urban environment. Once thought of as primarily a recreational amenity, the Fred Marquis Pinellas Trail, constructed on a former railroad right-of-way spanning the length of the County, has increasingly become a transportation corridor that is used by people for reaching destinations associated with their jobs and for everyday activities such as shopping, visiting friends, attending school, etc. In 2008, these types of trips accounted for roughly 67 percent of all travel on the Trail. The Pinellas Trail is 35 miles in length and contains several pedestrian flyovers so that users can safely cross the most heavily traveled roadways. Current construction plans will increase the length of the Pinellas Trail to 47 miles in coming years. Another significant step in the County's trail program is the 1999 agreement between the Pinellas County Board of County Commissioners and the Florida Power Corporation to locate a bicycle and pedestrian trail along an electrical power transmission corridor. The first agreement of its kind in the State of Florida, the resulting eastern trail segment, when connected to the existing Pinellas Trail, will result in a trail network of approximately 80 miles - almost forming a complete loop around the County. A Trail Plan adopted by the Pinellas County Metropolitan Planning Organization will pursue development of a trail network of almost 200 miles using the Pinellas Trail (including the eastern segment along the power corridor) as the backbone. This effort will result in a major transportation network that provides one alternative to the automobile for getting around. As this trail network expands, it will increasingly link residential, commercial, employment and recreational uses and enable an increasing number of people to reach destinations by means other than their cars.

Remaining Competitive in the Regional and Global Economy

Buildout confronts Pinellas County and its municipalities with one obvious resource constraint – the lack of large tracts of raw undeveloped land. Businesses desiring to locate in Pinellas County will find it necessary to redevelop property or reuse and renovate existing structures. While this can often prove to be more expensive than building on raw undeveloped land on the edges of the metropolitan area, this additional cost can be offset by providing businesses and their employees with amenities, resources, services, and a quality of life that sets Pinellas County apart from other areas. Redevelopment of commercial and industrial properties may also need to be supplemented with assistance from the public sector, such as in the cleanup of contaminated sites.

Continued growth in the knowledge-based sector of the County's economy will depend in large measure on the supply of skilled workers. At the beginning of the Twenty-first Century, the lack of adequately trained workers is perhaps the greatest hindrance to economic growth in Pinellas County and the metro area. A look at **Table 7** tells part of the story. The educational attainment of the work force is one indicator of a county's, or a metro area's, ability to retain and attract technology and other knowledge-based firms. In 1990 and 2000, the percentage of those Pinellas residents twenty-five years of age or older who had graduated from high school was slightly higher than the averages for the State of Florida and for the entire United States, and it was slightly lower than the percentages for several of the counties that have been experiencing significant growth in high technology jobs. When comparing the percentages of those who had attained a bachelor's degree or higher level of education, however, Pinellas County is found to fall considerably behind the bastions of high technology. Pinellas County's 18.5 percent and 23.4 percent figures for 1990 and 2000 are below the national average and considerably below other areas where high technology contributes significantly to the regional economy.

A highly trained and educated workforce is one of the key resources that can make Pinellas County attractive to businesses that provide high paying and challenging jobs. Providing this workforce presents a great challenge to the community, and one of the key ingredients is a quality secondary education and the presence of quality institutions to pursue post-secondary education. **Figure 10** identifies those institutions in the Tampa Bay area that provide either an Associate Degree or a higher degree.

Many of the knowledge-based jobs associated with the newer technologies are located in the services sector of the economy. The services sector, however, also includes jobs that are relatively low-wage and low-skill. Over the past several years, all components of the County's service economy have experienced growth, some more than others (e.g. the substantial increase in business services was mentioned above). Success in creating and attracting knowledge-based service jobs will depend on the quality of the County's workforce and the quality of life provided by the County and its various communities.

TABLE 7 Comparison of Educational Attainment for Different Areas of the United States in 1990 and 2000				
<u>Location</u>	<u>Educational Attainment</u> (Percent)			
	High School Graduate or More		Bachelor's Degree or More	
	1990	2000	1990	2000
Pinellas County, FL	78.1	84.8	18.5	23.4
New York Co., NY (Manhattan)	75.3	81.2	42.2	50.9
Santa Clara, Co., CA (Silicon Valley)	82.0	85.1	32.6	41.9
Orange Co., CA	81.2	77.8	27.8	32.0
Denver Co., CO	79.2	80.7	29.0	35.6
Travis, Co., TX (Austin Area)	83.4	86.2	34.7	42.9
Fairfax, Co., VA	91.4	90.9	49.0	56.1
Arlington, Co., VA	87.5	87.9	52.3	60.3
King Co., WA (Seattle Area)	88.2	91.9	32.8	41.3
Florida	74.4	81.9	18.3	23.2
United States	75.2	81.6	20.3	25.0

Source: U.S. Bureau of the Census – 1990 Census of Population and Housing,
Census 2000 Supplementary Survey Estimates

Note: Educational attainment is for those persons 25 years of age or older.

FIGURE 10
Public Community Colleges and Institutions Offering
Bachelor's Degrees or Higher

The quality of the workforce is a reflection of the local educational systems (both public and private) and the ability to attract educated and trained workers and their families into the area. Providing a quality of life that convinces residents and businesses to stay in Pinellas County and induces others to move here will be an ongoing challenge that must be accepted by the community, business leaders, local governments, neighborhoods, and individual citizens if Pinellas County is to remain successful in the long run.

Fortunately, Pinellas County's economy over the past several years has increasingly become diversified as manufacturing, electronic components, medical instruments and other high technology firms have taken their place beside the large number of businesses providing services to other businesses and to the residents and the numerous tourists who visit the County. In fact, even the Pinellas tourism industry is diversifying as it expands its destination assets beyond the County's outstanding beaches and excellent year-round weather to include a wide selection of natural, cultural and historic attractions. This diversification is enabling the County to capitalize on an increasing interest among visitors in cultural/heritage tourism and ecotourism. As it now stands, tourism remains a major industry in Pinellas County with some 5.3 million visitors having a direct economic impact of \$6.7 million in 2007. So at the beginning of the Twenty first Century, as at the opening of the previous century, tourism has a major role in the local economy. It has been noted in a recent assessment of the tourism industry that Pinellas County has two unique appeals – its beaches and its relaxed and diverse cultural charm. Successfully responding to the other challenges of buildout already discussed in this report will not only reinforce these appealing qualities of the County, but will also enable the County and municipalities to address some of the weaknesses identified in the assessment (i.e. outdated accommodation properties and retail strip centers, inefficient public transportation linkages, and blighted commercial areas).

ⁱ *City Life*, 227.

ⁱⁱ An interesting discussion of the Nolen plans for St. Petersburg and Pinellas County is found in R. Bruce Stephenson's *Visions of Eden: environmentalism, urban planning, and city building in St. Petersburg, Florida, 1900-1995* (Columbus: Ohio State University Press, 1997).

ⁱⁱⁱ Association of Homebuilders.

^{iv} "1999 Pinellas County Housing Report", Pinellas County Planning Department, Pinellas County, Florida, 2001.

^v There are some new housing units being constructed that are affordable to low income households, however, the number of units is a small percentage of the total being constructed.

^{vi} "Bay Area Apartment Market Survey-Third Quarter 2007", Bay Area Apartment Association, 2007.

^{vii} *Ibid.*, pg 17.

^{viii} The area north of S.R. 580 used in this analysis included the entire City of Oldsmar. The data was compiled by the Pinellas County Planning Department using employment estimates for Traffic Analysis Zones generated in 1998.