

US 19 Corridor Redevelopment Plan



Prepared by HDR, Inc. for the City of Clearwater, Florida

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INTRODUCTION

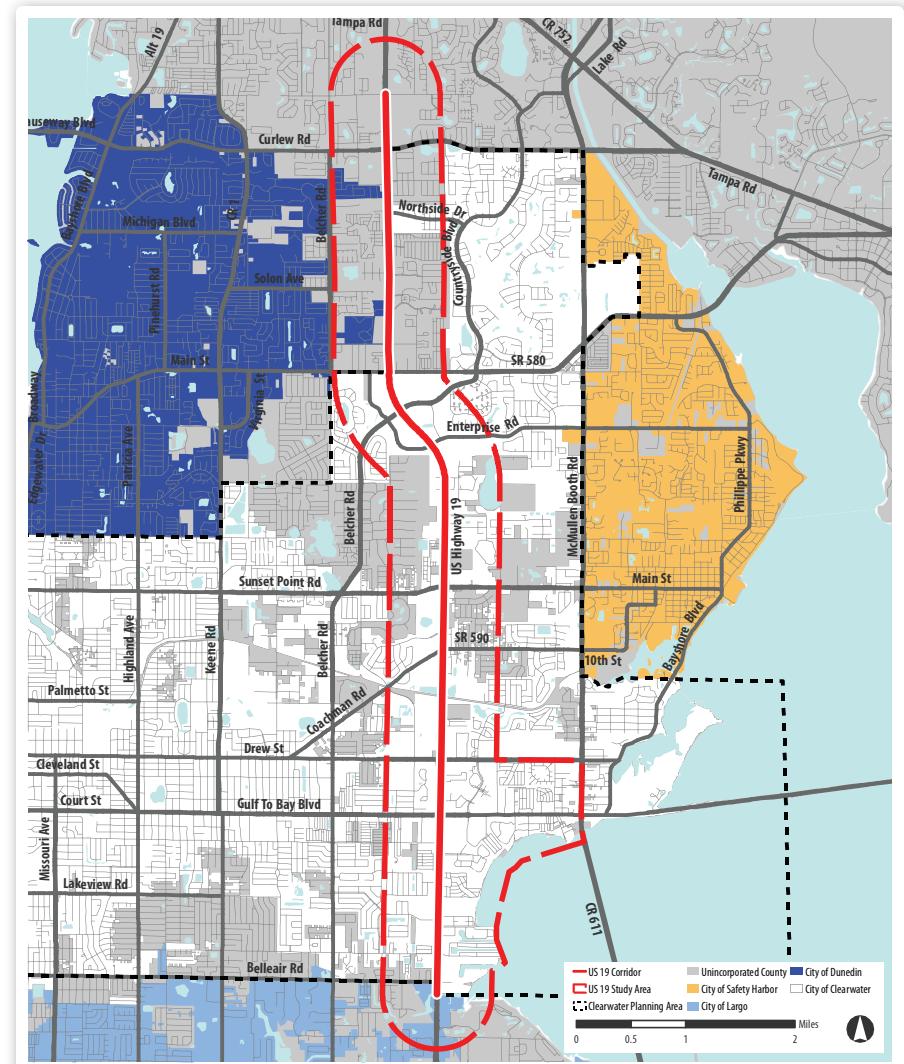
The *US 19 Redevelopment Plan* (US 19 Plan) offers guidance to the City as it works to improve conditions along the US 19 corridor. The plan contains strategies to leverage the corridor's unique locational advantages, capitalize on market opportunities, and maximize benefits of planned transit and transportation improvements.

The US 19 Plan is an important part of ongoing efforts to make Clearwater a more sustainable, livable, and economically competitive community. Plan recommendations build upon previous City plans including *Clearwater Greenprint* and the *Economic Development Strategic Plan*, both completed in 2011.

Prepared with support from a US Department of Energy grant, the US 19 Plan addresses the future of the 8.4-mile long corridor located primarily within the City of Clearwater. As shown in Figure 1, the study area for this plan was defined as the lands located within one-half mile of US 19 between the city limits south of Belleair Road and north of Curlew Road. The study area also includes sites along both sides of Gulf to Bay Boulevard between US 19 and McMullen Booth Road and properties along the south side of Drew Street between US 19 and McMullen Booth Road. Most lands within the study area are located in the incorporated limits of the City of Clearwater, although some parcels are in unincorporated Pinellas County but within the City's Planning Area. The few parcels in the most northern extent of the study area within the City of Dunedin are excluded from this study.

The plan was developed by the City of Clearwater with assistance from HDR Engineering, Inc. (HDR) and their consultants RCLCO and the University of Florida Program for Resource Efficient Communities (UF PREC).

Figure 1. US 19 Study Area



The US 19 Redevelopment Plan includes the following sections:

- › Issues & Ideas. Outlines public engagement efforts and summarizes comments received during planning process
- › Market Context. Provides overview of existing market conditions and demand for the future
- › Planning Context. Describes existing land use, open space, form and character, development, and mobility conditions
- › Framework Plan & Concepts. Describes the preferred redevelopment pattern on the corridor and provides demonstration concept site studies for four areas within the corridor.
- › Plan Strategies. Outlines recommended strategies and actions related to revitalization and redevelopment, competitiveness, mobility and connectivity, and sustainability on the corridor.

Appendices to the plan provide supporting documentation. The appendices include:

- › Context Maps
- › Case Studies
- › Engagement & Outreach Activities

ISSUES & IDEAS

Conditions along the US 19 corridor have changed dramatically over the past several years—the roadway's redesign, changes in access and circulation patterns, and the economic downturn have affected property owners, businesses, and local residents. Now that plans for the roadway's improvement have been developed, several phases of roadway work are complete, and economic conditions are improving, the City wants to plan for the corridor's future and answer the following questions:

- › How can US 19 become a more attractive place in the City?
- › What's the right mix and pattern of land uses?
- › How can we make it easier and safer to travel from place to place?
- › How can we ensure new projects make positive contributions to the City's economic vitality and sustainability?

To help the City find answers to these and other important questions about the corridor's future, the City held a series of stakeholder listening sessions in March 2012. Participants learned about the planning process and were asked to describe the Corridor's assets or best qualities, discuss the key issues or challenges, and provide ideas or visions for the future.

The City also held two public workshops, one at the beginning of the project to provide an overview of the project to members of the public and another later in the process to get input on initial strategies for the corridor. The two workshops were held in May and August 2012.

A series of focus groups allowed the City to get further input on the preliminary plan strategies in August and September 2012. Development professionals and corridor stakeholders were invited to small, informal meetings to review the initial strategies for the corridor and provide feedback in preparation of the draft corridor plan.

Figure 2. Citizens Reviewing Display Boards at Public Workshop 1



The City also developed a project-specific web page on the City's existing website with a link to an online discussion board at www.myUS19plan.com. The online discussion board hosted by MindMixer, an Internet-based engagement tool, allowed stakeholders to share ideas, comment on the ideas of others, and learn more about the vision and opinion of others interested in the corridor's future.

The following sections provide a review of the public outreach and engagement activities and a summary comments received during the planning process. While much of the public input was focused on the roadway construction and improvement plans, the following sections outline the comments relevant to the US 19 Plan. A list of all outreach and engagement activities has been included in Appendix C.

1. STAKEHOLDER LISTENING SESSIONS

To gather input on the project in open, informal settings, the project team held a series of stakeholder listening sessions. Facilitated by the members of the team, the sessions were designed to bring forth perceptions and expectations to help better understand different viewpoints among corridor stakeholders. Each session included round-robin introductions of participants, brief remarks from project team members, and facilitated discussion and idea sharing.

The project team held two types of meetings to engage corridor stakeholders—group sessions organized by general types of stakeholders and individual sessions organized for targeted outreach to specific individuals or small groups.

Feedback from the sessions was used to guide planning for additional public involvement activities and prepare preliminary strategies and plans for the improvement of conditions along the corridor.

Group Listening Sessions

Over the course of two days, the project team held five group listening sessions organized by general types of stakeholders—auto dealerships, retailers or offices, community, realtors/developers/design professionals, and entertainment/lodging. Although the sessions were widely advertised and open to the public, the City reached out to specific groups or individuals and encouraged participation.

A total of over 75 people attended one of the five, 1.5 to 2 hour-long sessions. Project team members invited participants to share their thoughts and discuss the assets or best qualities, issues or challenges, and ideas or vision for the future of the corridor. A summary of responses is summarized below.

Figure 3. Community Listening Session



ASSETS

Participants described the corridor's assets and best qualities, including any unique features, special places, competitive advantages, or other qualities to preserve. Assets mentioned by listening session participants included:

- › Quick access, good visibility, and regional exposure for businesses and services;
- › Great local and regional destinations such as Bright House Field, Clearwater Mall, and Countryside Mall;
- › Good access to services, recreation, and shopping from adjacent residential areas;
- › Close proximity to beaches; and
- › Increased safety and level of service on US 19 as a result of limited-access roadway improvements.

ISSUES

Participants also shared their issues with the corridor and described the existing challenges along and adjacent to US 19. They discussed what needs fixing, what is currently missing, and what gets in the way of positive change on the corridor. Issues mentioned during the listening sessions included:

- › Active construction creates disturbances for businesses and residents;
- › Negative perception of corridor, at least partly due to construction and access issues;
- › Uncertainty among property owners and tenants, many of whom expressed concern about how the US19 improvements might change the character of the area and negatively impact their businesses and properties;
- › Inadequate wayfinding along completed sections of US19;
- › Ineffective property/business signage given changes in roadway condition;
- › An incomplete or disconnected local street network that limits connectivity;
- › Poorly located bus stops and buses stopping in travel lanes impedes traffic;
- › Vacancy increasing in locations between major intersections;
- › Need for better multi-modal connections between commercial, residential, and recreational areas;
- › Poor pedestrian access and amenities along US 19 and connections across highway;
- › Isolated, hodge-podge, and unattractive development pattern;
- › Unappealing aesthetics of roadway and need for landscaping or design features; and
- › Parcelization affecting potential for redevelopment.

IDEAS

Finally, participants shared their ideas for the future of the corridor. Participants discussed the ideal mix of activities, how to improve access from place to place, ways the City can promote sustainable development, and appropriate change for US 19. The following ideas were generated during the listening sessions:

- › Establish coordinated wayfinding and directional signage programs;
- › Improve conditions at gateways along US19 and Gulf to Bay Boulevard;
- › Provide changes to development standards to accommodate flexibility, mixed uses, and higher density/intensity districts at major intersections;
- › Rebrand corridor and create identifiable districts and destinations;
- › Provide incentives for redevelopment including parcel assembly;
- › Require interconnectivity between sites;
- › Promote development of local street network;
- › Increase pedestrian and bicycle safety through improved amenities and facilities;
- › Improve transit service along corridor and between destinations and adjacent residential areas;
- › Improve aesthetics on corridor through landscaping, underground utilities, etc.; and
- › Attract new employers to mixed-use employment centers.

Individual Listening Sessions

In addition to the group listening sessions, the project team also held a series of individual stakeholder listening sessions that were organized for targeted outreach to specific individuals or small groups. The City contacted an assortment of individuals with interests on the corridor and invited them to participate in one-on-one or small group sessions.

Participants shared similar feedback to that received during the Group Listening Sessions, although more focused on issues and ideas related to the future of individual sites. Participants in these sessions discussed ideas for wayfinding, suggested ways to provide regulatory incentives or regulatory relief to improve the corridor's attractiveness to private investment, and shared ideas for improving access and circulation. The following specific issues and ideas were discussed during the individual listening sessions:

ISSUES

Participants were particularly concerned with the current nature of the corridor, and identified the following issues with the current state of the corridor:

- › Uncertainty of corridor's future given US 19 improvements;
- › Vacancy is high and corridor seems barren and desolate;
- › Perception that Clearwater is a difficult place to do business given complex and lengthy review processes;
- › Difficult and limited access for properties on frontage roads affects development potential;
- › Loss of industrial-zoned property to residential and public uses;
- › Access to properties south of Countryside Mall a concern with closing of Enterprise Road crossing; and
- › Lack of identify for individual destinations and sub-districts along US 19 corridor.

IDEAS

In addition to expressing their concerns for the existing conditions of the corridor, participants also had numerous ideas for the future of the corridor:

- › Adjust zoning regulations to facilitate development, increase intensity, speed review cycles, and widen mix of permitted uses but limit incentives, grants, tax credits, etc.;

- › Potential for parcel assemblage (e.g., vacant auto dealerships near Harn Boulevard and vacant parcels near Sunset Point Road) could increase attractiveness of select sites;
- › Potential for small-scale office development to take advantage of improved regional access;
- › Create public-private partnerships to encourage development;
- › Potential for year-round, recreation/entertainment-oriented center with hotels, restaurants, and recreational/entertainment uses in area surrounding Bright House Field;
- › Create wayfinding signage and management program to assist travelers on US 19 and within sub-districts along corridor (e.g., Lakewood Ranch color-coded signage, destination signs, navigational signs); and
- › Explore potential for development of business improvement or special assessment districts for sub-districts along corridor.

2. PUBLIC WORKSHOPS

Building upon feedback gained at the smaller listening sessions, the City held two larger public workshops to get input from a greater range of corridor stakeholders. The objective of the first workshop was to review findings from the initial phases of the planning process and solicit ideas for the corridor's transformation. The focus of the second workshop was to build understanding of plan goals and objectives and test community acceptance of preliminary strategies for improvement.

Public Workshop 1

The first public workshop was held on May 30, 2012 at the La Quinta Inn Clearwater Central. The three-hour workshop started with an open house, followed by a presentation given twice for early and late attendees. The presentation provided an overview of the project, input received during the listening sessions, and a more detailed description of the planning process. A total of 42 participants were in attendance.

Figure 4. Public Workshop 2



Attendees were invited to visit a series of information stations, each highlighting a different sub-district concept drawing along the corridor. Project team members were available at each station to provide further detail about each sub-district, answer questions, and receive comments.

Florida Department of Transportation (FDOT) representatives were available throughout the workshop to provide additional information and answer questions regarding the US 19 roadway construction project.

In general, participants were concerned with the current construction difficulties and the uncertainty that the new roadway conditions might create for the future. Comments also included a hope that the corridor would have multi-modal transportation options and a better wayfinding system and landscaping in the future. Participants also discussed the need to evaluate the existing impact fees for corridor properties.

Public Workshop 2

The second public workshop was held on August 14, 2012 at the Holiday Inn Express Hotel & Suites/US 19. Over 60 individuals attended the 2.5 hour-long workshop, which included a presentation followed by a question-and-answer session. The focus of the presentation was on preliminary strategies for improvement of the corridor.

Representatives from FDOT were again available prior to and following the presentation to answer questions directly related to the US 19 roadway construction. Following the presentation, attendees were asked to complete a priority-setting dot exercise to rank recommended strategies introduced during the presentation. Both before and after the presentation, workshop participants were also invited to view display boards set up around the meeting room and ask project team members questions or provide additional comments.

The preliminary strategies that received the most votes during the priority-setting exercise included:

- › Permit higher development intensities and densities for projects within the Countryside and Gulf to Bay Regional Centers;
- › Explore potential to add research, office, laboratory, and clean manufacturing uses;
- › Explore potential to reduce permit or impact fees, provide local economic development tax exemptions (subject to voter approval), and offer other direct financial incentives;
- › To streamline permit review processes for large scale projects in the corridor, assign a dedicated permit technician;
- › To promote employment-intensive projects, allow for increases in intensity for larger office and commercial sites; and
- › Establish an incentive program to encourage reinvestment in older properties, including the removal of vacant buildings, façade improvements, landscaping, and site improvements.

3. FOCUS GROUPS

A series of smaller, informal focus group sessions were held in August and September 2012 with development and real estate professionals, retailers, offices, and sustainability professionals. These sessions were intended to gather additional feedback on the preliminary framework plan and list of strategies for the corridor's improvement. Participants discussed the following:

- › Potential for US 19 corridor business improvement or other special district designation to organize property owners, create self-taxing authority, or serve as advocacy group;
- › Opportunity for mobility fee or other impact fee exemptions;
- › Methods to improve wayfinding and private signage along the corridor at three different scales
- › Need to explore potential for off-site or consolidated stormwater retention systems;
- › Advantages and disadvantages of additional development standards or incentives; and
- › Landscaping, buffer treatments, and pedestrian improvements along US 19 frontage roads and other public rights-of-way.

4. ONLINE DISCUSSION BOARD

The project's online discussion board, www.myUS19plan.com, was introduced in March 2012. In addition to allowing citizens to post and respond to a set of topics, the site provided background information on the project, a description of the study area, and workshop presentations. Between March and September 2012, three rounds of topics were posted on the site.

Figure 5. Screenshot from MindMixer Online Discussion Board

The screenshot shows the homepage of the 'US 19 CLEARWATER Creating Innovative Places' online discussion board. At the top, there's a navigation bar with 'See How It Works.', 'SIGN IN', and 'JOIN' buttons. Below the header, a banner features a cityscape and the text: 'The City of Clearwater is planning to make the US 19 corridor more attractive, successful, and sustainable. What does the future hold for the corridor?'. To the left, a 'SIGN UP NOW!' button with a subtext 'share your ideas today!' is displayed above an aerial photo of a highway interchange. To the right, a 'Welcome to My US 19 Plan' message encourages users to contribute ideas to move the community forward. A 'FEATURED SURVEY' section shows a photo of a residential building and the question 'What Redevelopment strategies do you recommend?'. On the far right, a blue button says 'Submit your ideas!', and a status bar indicates '23 Days Remaining' and '28 Surveys Taken'. The right sidebar contains a 'RECENT COMMENTS' section with two entries: one about traffic stopping at a junction and another about the proximity to an overpass.

Round 1 Topics

The site opened with an initial set of general topics designed to stimulate thinking about desired conditions along the corridor. Over the course of two months, the site received 60 ideas with 64 comments on the following five topics:

- › Vision & Identity;
- › Uses: Live, Work, Shop & Play;
- › Placemaking & Urban Design;
- › Getting from Place to Place; and
- › Sustainability.

The questions posed on the site and summary of responses for each of the topics is provided in Table 1.

Table 1. Online Discussion Board Comment Summary - Round 1 Topics

Topic	Questions Posed on Site	Summary of Comments
TOPIC 1. VISION & IDENTITY	Conditions along the US 19 Corridor have changed dramatically over the past several years—the roadway's redesign, changes in access and circulation patterns, and the economic downturn have affected property owners, businesses, and local residents. Now that the roadway work is mostly complete and economic conditions are improving, what does the future hold for the Corridor? What is your vision for the Corridor? In a few words, how do you want the Corridor to look 10-20 years from now?	In the future, respondents envision a US 19 corridor that: <ul style="list-style-type: none"> › Is designed to allow unimpeded, smooth-flowing north-south vehicular travel; › Has improved aesthetics through creation of landscape buffer and relocation of utility lines; › Concentrates development at key locations to create pedestrian-friendly villages; and › Provides easy access to businesses through use of appropriate signage.
TOPIC 2. USES: LIVE, WORK, SHOP & PLAY	The US 19 Corridor offers a wide range of uses and activities—from shops and restaurants to workplaces, neighborhoods, and recreation sites. As conditions change over the next 10-20 years, the mix and type of land uses will change. Think about how the mix and location of uses might affect the Corridor's success. What uses and activities would you like to see in the future, and where should they be located?	As the US 19 corridor redevelops, respondents would like to see: <ul style="list-style-type: none"> › Additional recreational uses; › A trail and greenway network; and › Mixed-use employment districts with supporting services and residential uses.
TOPIC 3. PLACEMAKING & URBAN DESIGN	The character and quality of places along the US 19 Corridor will have a powerful influence on the City's long-term success and competitiveness. Safe, attractive, well-designed, and well-connected places will help maintain the community's reputation as a great place to live, work, and visit. How can places and destinations along the Corridor be improved? What qualities contribute to the creation of successful, attractive destinations?	Respondents suggested that the best strategy to develop destinations and places along the corridor would be to: <ul style="list-style-type: none"> › Improve aesthetics and streetscape amenities at overpasses; and › Look to models of other destinations with good signage, connectivity, and public spaces.
TOPIC 4. GETTING FROM PLACE TO PLACE	Successful communities offer a range of options for getting from place to place. In addition to providing for safe and convenient car travel, the City is interested in making biking, walking, and transit more attractive. Question - How can places along the Corridor be better connected? How can we make it easier, safer, and more convenient to travel from place to place along the Corridor?	To accomplish better connectivity along the Corridor and in adjacent areas, respondents would like to see: <ul style="list-style-type: none"> › Increased wayfinding signage; › Improved bus stop locations and design along US 19; › More frequent pedestrian crossing over US 19 and at intersections; › Upgraded traffic management systems, especially along Gulf to Bay Blvd; › Better cross-parcel access and connections; and › A direct connection between US 19 and I-275.
TOPIC 5. SUSTAINABILITY	Promoting energy efficiency, conserving resources, improving livability, and reducing impacts on sensitive resources are just a few of the objectives highlighted in <i>Clearwater GreenPrint</i> , the City's guidebook for promoting more sustainable forms and patterns of development. What sustainability goals should be used to guide planning for the US 19 Corridor? How can the plan help the City achieve its goals for becoming a more stable, resilient, and attractive place for residents and businesses?	In terms of how to increase sustainability along the US 19 Corridor, respondents suggested: <ul style="list-style-type: none"> › Promoting or requiring low impact development; › Providing multi-modal access; › Creating concentrated employment centers; and › Encouraging development through changes to development standards and signage.

Table 2. Online Discussion Board Comment Summary - Round 2 Topics

Topic	Questions Posed on Site	Summary of Comments
TOPIC 1. COUNTRYSIDE ACTIVITY CENTER	Recent improvements at Countryside Mall and Countryside Centre have strengthened the district's position as a regional destination for shopping and dining, and the existing cluster of professional offices might serve as a foundation for a future employment center. How can we build on Countryside's assets and make the district a stronger, more attractive destination? Better wayfinding signs? Improved local street networks? A wider range of uses? Enhanced transit service? Pedestrian-friendly site designs?	<ul style="list-style-type: none"> › Need for better circulation and wayfinding near Enterprise Rd once traffic light is removed. › Consider adding medians and left turn lanes along SR 580/Main Street. › Evaluate traffic light signalization out of Countryside Mall and other shopping centers and along Countryside Blvd.
TOPIC 2. GULF TO BAY ACTIVITY CENTER	Gulf to Bay Boulevard between US19 and McMullen Booth Road serves as the primary gateway to the City of Clearwater. Conditions in the area strongly influence the perception of visitors to the City. How can the area be improved as a gateway? How can the City capitalize on the area's strong locational advantages and critical mass of retail, restaurant, and recreation uses? Better connections between destinations? Redevelopment of older commercial strips and trailer courts? Improved streetscapes and landscaping? Enhanced transit service?	<ul style="list-style-type: none"> › Improve traffic flow and safety on Gulf to Bay Blvd by improving traffic signalization or adding landscaped medians with dedicated left-turn lanes between McMullen Booth and US 19. › Consolidate auto dealerships in "auto mall" location. › Increase cross-parcel access for businesses along Gulf to Bay Blvd. › Improve roadway surface on Park Place Blvd. › Utilize vacant properties for recreational purposes.
TOPIC 3. SUNSET POINT & COACHMAN DISTRICT	Projects at the US19 intersections of Sunset Road and Coachmen Road have served the daily needs of nearby residents for the past 20-30 years. How can we reinforce the neighborhood-serving function of the area while promoting redevelopment of vacant and underutilized sites?	<ul style="list-style-type: none"> › Use vacant properties as community gardens or other public benefit › Create artwork on overpass retaining walls. › Implement uniform signage and remove visual clutter along US 19. › Encourage redevelopment in vacant buildings near Sunset Point Rd. › Improve traffic flow on ramps and frontage roads.
TOPIC 4. BELLEAIR DISTRICT	Once the overpass is complete, Bellair Road will be southernmost point of access to US19 in the City. How can we capitalize on direct access to US19 while attracting uses that serve the needs of local residents, office workers, and visitors? Can vacant sites be reused for higher intensity office and residential uses? Should new retail and restaurants be located at the intersection? Can landscaping and gateway signs help reinforce this location as the City's southern gateway?	<ul style="list-style-type: none"> › Build an aquatic community center or dog park on vacant land near Bellair Rd. › Need to create mixed-use destination with restaurants, shops, and a park. › Create an overpass at Bellair Rd to allow U-turns and allow traffic on US 19 to flow smoothly along US 19.
TOPIC 5. IN BETWEEN AREAS	When FDOT's improvements are complete, access to US19 will be limited for areas between the major crossroads. How can these areas remain productive and attractive in the future? Should strip commercial development be discouraged? Should redevelopment to more intensive office and residential uses be encouraged? Can the visual character of the in between areas be enhanced? Can connections to surrounding neighborhoods be improved?	<ul style="list-style-type: none"> › Need for wayfinding signage, perhaps consolidated, for businesses not located at primary intersections along US 19. › Streetscape and vacant site improvements. › Improve traffic flow and merging onto US 19 from frontage roads. › Add bus pull-out lanes along US 19 and frontage roads and create safe crosswalks for transit riders crossing US 19 . › Focus on creating consolidated developments that are destinations.

Round 2 Topics

A second round of topics was posted on the MindMixer site between May 10 and August 30, 2012. For this set of topics, participants were asked to make suggestions to help the City of Clearwater plan for the future of destinations along the US 19 corridor. Visitors to the site were asked to share their ideas and proposals for encouraging the right mix of uses, improving street and transit connections, guiding visitors to destinations, and creating places with quality buildings, walkable streets, and attractive public spaces.

Using a map for each of the following five geographic areas, respondents were invited to identify specific areas for improvement or change. The five geographic areas or sub-districts included:

- › Countryside;
- › Gulf to Bay Activity Center;
- › Sunset Point & Coachman;
- › Belleair; and
- › In Between Areas.

The questions posed on the site and summary of responses for each of the topics is provided in Table 2.

Round 3 Survey

Similar to the priority-setting exercise conducted as part of the second public workshop, the City conducted an online survey between August 14 and September 30, 2012 to get input on suggested strategies for the corridor's improvement. The survey was organized around three primary topics:

- › Revitalization;
- › Competitiveness; and
- › Mobility.

Participants were asked to indicate their top three preferred strategies for each of the three topics to help the community achieve objectives to improve the corridor. The strategies and votes received for each of the survey topics is provided in Figures 6 through 8.

Figure 6. Online Survey Results for Revitalization Strategies

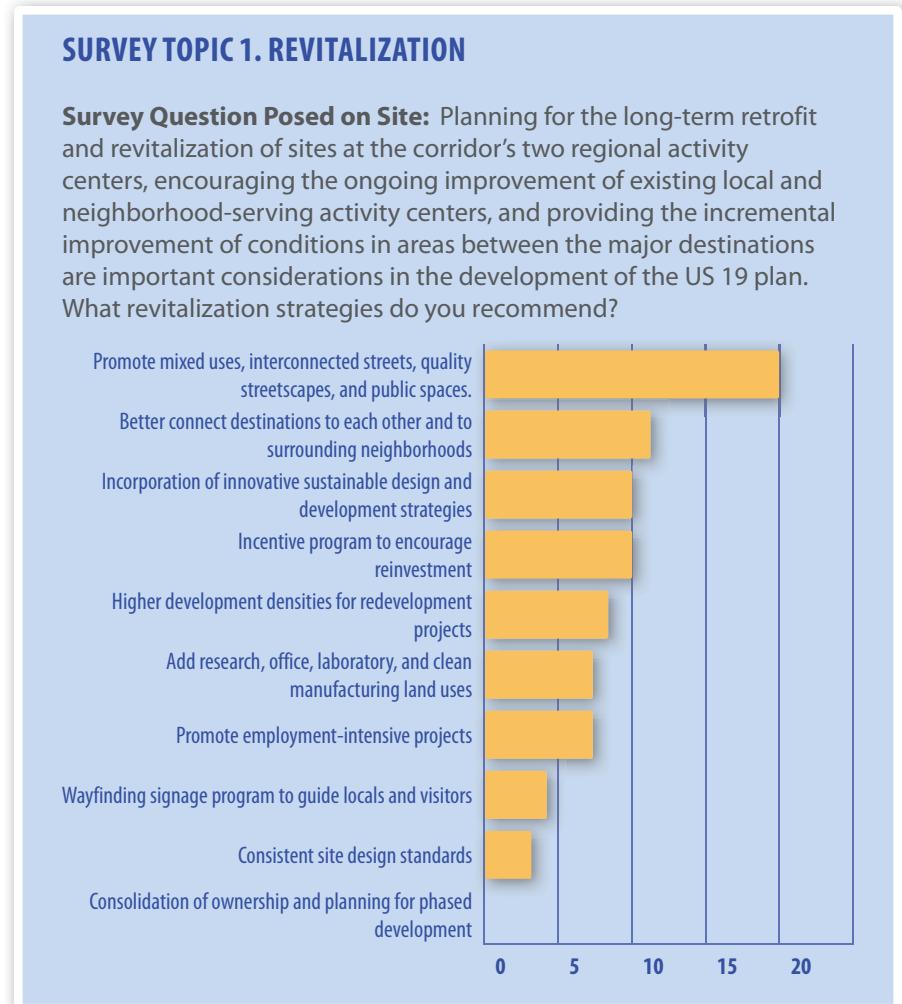
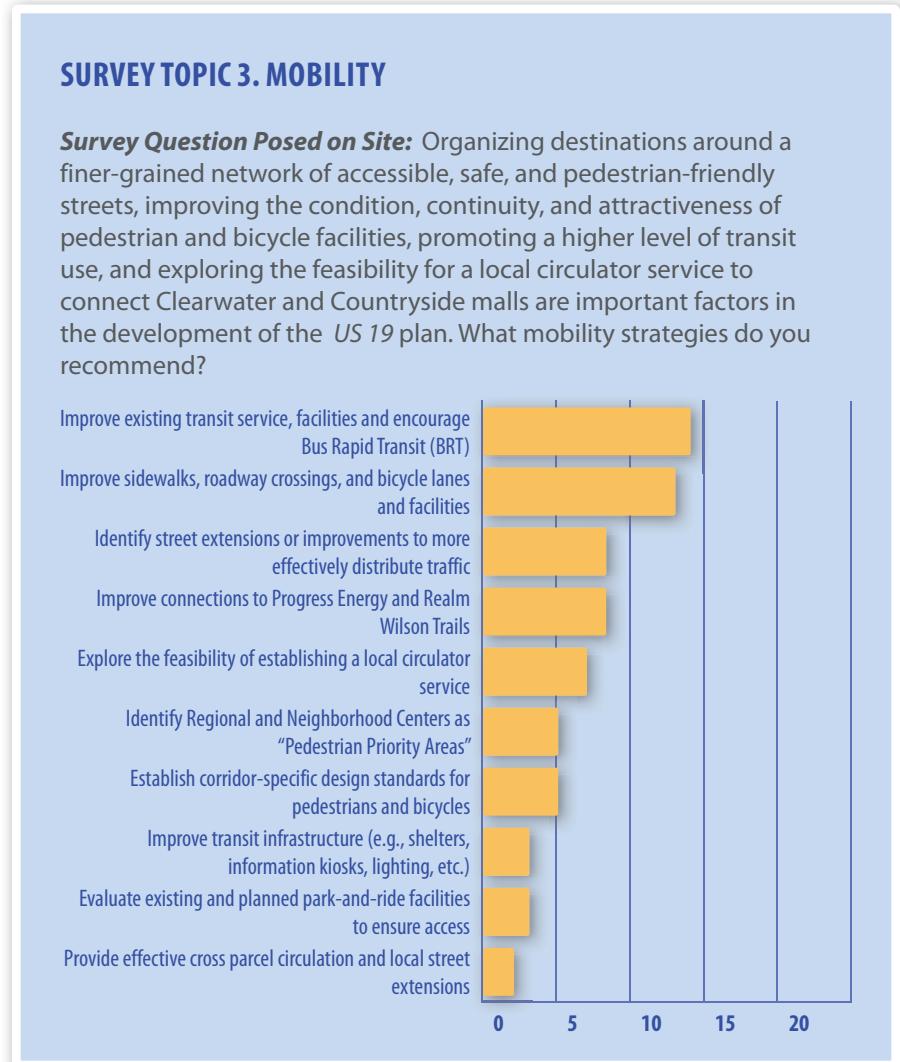


Figure 7. Online Survey Results for Competitiveness Strategies



Figure 8. Online Survey Results for Mobility Strategies



MARKET CONTEXT

In the preliminary development of the US 19 Plan, RCLCO, a national real estate market expert, completed a separate report, *Summary of Market Analysis for the US 19 Corridor*, that outlined the conditions and trends that influence the US 19 corridor's market position in the City and Tampa Bay Region. The findings of this report were presented to a group of corridor stakeholders in April 2012. What follows in this section of the plan is the executive summary of that report and serves as the market assessment for the US 19 corridor. The market analysis was conducted to ascertain the quantitative and qualitative aspects of demand for current and future land uses that might be appropriate for future development in the study area and to quantify the potential scale and timing of these uses.

1. MARKET OVERVIEW

Corridor Location

The US 19 corridor is well-located relative to sources of demand and access to water. US 19 is an important north/south corridor and Gulf to Bay Boulevard is a primary east/west crossroad in Pinellas County. According to CoStar, the corridor is predominantly retail in nature. Over 70 percent of the commercial space is retail, 25 percent is office, and 5 percent is industrial/flex. Due to the reconfiguration of US 19 into a limited-access roadway, much of the retail along the corridor is either obsolete, or becoming obsolete as the areas between the major intersections are no longer prime retail locations.

As shown in Table 3, the corridor's location offers numerous strengths and challenges. Retail at key intersections (such as the Clearwater Mall on Gulf to Bay Boulevard and US 19) is in good repair, well located, and

TABLE 3. US 19 Corridor Market Strengths and Challenges

STRENGTHS	CHALLENGES
Transportation/Access <ul style="list-style-type: none"> › Strong North-South access in the region › Key East-West connections › Transformation to a limited-access highway will help mitigate congestion 	Transportation/Access <ul style="list-style-type: none"> › Strained access to businesses resulting from US 19 construction › Visibility of destination commercial space › Pedestrian and cross connections not strong—therefore, even with existing retail, hard for households and tenants to access them
Connection to Demand Sources <ul style="list-style-type: none"> › Over 100,000 households within 5 miles from the center of the corridor › Well-connected to other economic cores in the Metro. Statistical Area 	Market Economics <ul style="list-style-type: none"> › General economic downturn and real estate market suffering makes redevelopment areas even more challenging
Fantastic water views <ul style="list-style-type: none"> › Parts of the corridor have great water access, should look for redevelopment opportunities in those areas 	Lack of available land Lack of key anchors and focal points
Focal point of redevelopment by the City	Rumor of difficulty of City approval process

likely to grow as retail continues to consolidate along these same key intersections on the corridor. Office buildings in the corridor tend to be older, and many need to be updated to current tenant requirements (such as good wiring). In 2010 there were 20,532 housing units within the corridor for a jobs-to-housing ratio of 1.9 jobs per households, suggesting the corridor is fairly balanced. Esri reports that 53 percent of

the corridor's housing units are owner-occupied, 28 percent are renter-occupied, and the remainder are for seasonal use or vacant.

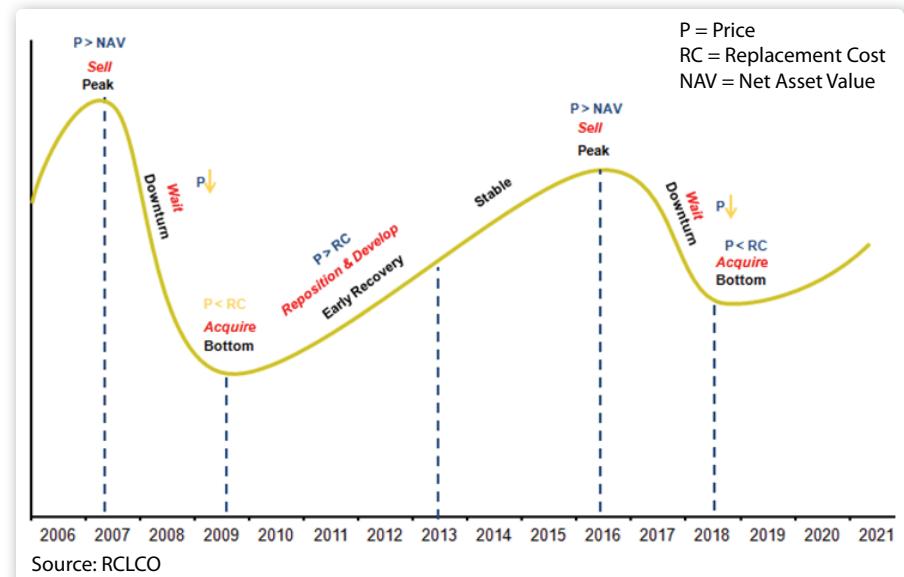
National Outlook

The future success of the corridor is related to the local and regional outlook for real estate (typically related to the projected job and household growth) and the national outlook for real estate overall. While the national media continually reports negative news for residential real estate, a double dip residential drop is not expected. Based upon RCLCO's work across the country, national statistics, and up-to-date projections, it is expected that residential real estate will bump along the bottom between 2012 and 2013, depending on location (in fact, some fortunate places like Austin are already in residential recovery).

Moody's Analytics presents the most aggressive employment growth estimates, which forecast the return to pre-recession employment in 2014. While this results in an additional six million jobs, the economy will not reach full employment due to increased population and labor force participation. A slower recovery is expected, with a return to pre-recession employment highs after 2015, and a return to full employment in 2016 or beyond. Regional and sector divergence are expected to continue. Threats to recovery include the price of oil and unrest in the Mideast, a further decline in the housing market, state and local government stress, the European sovereign debt crisis, weakening consumer confidence, and political deadlock.

Based upon this national job outlook, housing starts will begin to rise in 2013 while lending standards and regulatory uncertainties loosen. In most markets "normal market conditions" will return in 2013-2014. Another key factor is the return of the Baby Boomers and Gen Y into the housing market starting in 2015 and continuing for 10 or more years. These generations have a significant impact on the underlying demand for real estate given their size and the timing of their entry or re-entry into the housing market.

Figure 9. National Real Estate Outlook



One of the main influences on consumers' home buying decisions is their stage in life. Young couples (currently Gen Y) tend to buy smaller, affordable homes; families (mainly Gen X) tend to buy the biggest home they can afford; and empty nesters (currently baby boomers) often look for a smaller home with a higher level of finish. While these are broad generalizations, demographic segment trends do suggest which type of home a buyer of a specific generation would choose.

Real estate performance in the US has been consistently cyclical, at least since records on commercial and residential pricing and volume have been tracked. "Peaks" and "valleys" may have different direct causes in every cycle, but they consistently result from inevitable buy-side exuberance after a period of steady value increases and associated loosening of capital, particularly credit, resulting in skyrocketing pricing and excessive production. An event triggers an awakening of the market to the untenable situation in which it finds itself, and values, transaction,

and production come to a standstill. The most recent real estate boom and bust was exceptionally severe, but very closely repeats patterns of earlier cycles. Figure 8 outlines the projected path of the real estate cycle over the next decade, including the timing for the following stages:

- › Bottom (2009-2012): The real estate bottom is characterized by real estate prices being below replacement costs; the bottom represents the ideal time to acquire existing assets.
- › Early Recovery (2011-2013): During the early recovery, prices begin to exceed replacement costs for many assets; the stage still offers numerous opportunities to acquire assets, as well as to reposition and develop those in preparation for subsequent phases.
- › Stability (2013-2014): Competition for assets becomes more difficult during the stable phase of the market; the market may offer select investment opportunities, but prices are increasing as cap rates compress.
- › Peak (2015-2016): At market peak, capitalization rates (the ratio between the operating income produced by an asset and its capital cost or original cost of purchase) have compressed to the point that prices exceed reasonable net asset values for assets; the only purchasing opportunities will be highly opportunistic, otherwise, this represents the best opportunity to sell.
- › Downturn (2017): Investment activity is difficult during the downturn as it is impossible to know when the market will hit bottom and/or how low it will go; the downturn is a good time to start raising and committing funds to take advantage of low prices during the bottom.
- › Bottom (2018-2019): The real estate bottom is characterized by real estate prices being below replacement costs; the bottom represents the ideal time to acquire existing assets.

Regions and submarkets vary within regions, which makes it critical to understand local market dynamics.

Regional Economic & Demographic Analysis

While there are many unique attributes and characteristics that distinguish metropolitan areas, there are also striking similarities between the pattern of development in most North American metropolitan areas. In the 1990s, RCLCO utilized this observation to identify and catalogue rules governing the way metropolitan areas evolve from a real estate perspective. Economic growth had generally focused in the “favored quarter” of metropolitan areas, which is almost always in the immediate proximity of upper-middle and upper-end executive housing and influenced by the configuration of the region’s limited access highway systems. The “favored quarter” is typically drawn from the original downtown to where the majority of new housing is located, where the vast majority of new spending on infrastructure and new roads occurs, and where much of the commercial real estate and job growth has occurred. Figure 10 shows Tampa’s Favored Quarter.

While the favored quarters have defined the directions of growth, a significant portion of a region’s economic activity occurs in regional economic centers, which RCLCO calls Metro Cores. These activity centers have a large concentration of employees, especially the highest paying “export” oriented jobs, which are the jobs that drive the growth of regions. In the Tampa Bay region and elsewhere, Metro Cores tend to locate about five miles apart, near major transportation nodes that provide access to other economies, and close to executive housing. Understanding the number, composition, size, and location of Metro Cores in a region, drilling down into the composition of each of the Metro Cores, provides a basis for understanding metropolitan growth trends and a means of forecasting future growth.

As shown in Figure 11, the US 19 corridor benefits from being located near two of Tampa Bay Region’s Metro Cores: downtown Clearwater and the St. Pete-Clearwater Airport. While the corridor itself has enough employment to seem to qualify as an employment core, the jobs are not dense enough to be a core. It would be necessary to consolidate a

Figure 10. Tampa's Favored Quarter



significant amount of the corridor employment in one location to be considered a regional employment core.

The City of Clearwater and the US 19 corridor are located in Pinellas County which is part of the Tampa-St. Petersburg-Clearwater Metropolitan Statistical Area (Tampa MSA). Pinellas County is primarily built out, and as such, is not projected to receive a large amount of future growth in the region.

The corridor location places it outside Tampa's current favored quarter of growth; however, it is located in a highly desirable location close to existing employment cores and the beach. The Tampa MSA is expected

Figure 11. Tampa Bay Region's Metro Cores



to grow by almost 50,000 people annually from 2011 to 2020, according to The University of Florida Bureau of Economic and Business Research (BEBR). Of this growth, approximately 8.5 percent is likely to be seen in Pinellas County. Within the County, households that are projected to see the greatest growth are those households ages 65 and over. Currently, these households make up approximately 40 percent of all County households, and are projected to grow to 43 percent of total households over the next five years. This mirrors the trends seen nationally of an aging population, especially in southeastern coastal locations.

The Tampa MSA is anticipated to see an uptick in employment growth in 2012, with the addition of over 23,500 jobs, after losing approximately

70,000 jobs in 2009, losing 16,000 jobs in 2010, and gaining 13,460 jobs in 2011. A significant increase in employment is projected in 2013 onward, with a projected increase of 19,400 employees per year through 2020. The economy is driven primarily by the Trade, Transportation and Utilities, Professional and Business Services, and Education and Health Services sectors. Not surprisingly, job losses from 2000 to 2010 were most significant in Manufacturing. From 2011 to 2020, the sectors anticipated to see the greatest amount of growth are Education and Health Services, Financial Activities, and Leisure and Hospitality.

2. MARKET SECTOR ANALYSIS

Retail Market

US retail sales have improved from their lows in 2009, helping to spur national improvements in retail real estate performance and fundamentals. Solid consumer spending, supported by households dipping into their savings in order to buy necessity items—and, increasingly, discretionary ones—has maintained above-average performance for grocery-anchored strip centers even during the recession and is driving the early retail recovery across other property types. Vacancy rates have peaked and are beginning to fall as demand is gently rising, though rents have not yet increased across the board. True recovery of retail real estate will depend upon stronger wage growth, job growth, and economic expansion to drive sustained consumer spending. The general lack of new retail deliveries throughout the downturn should assist as well, as existing vacancies are absorbed with limited new competition.

Transformative changes to retail have ramifications for all but the most well-positioned assets. Internet sales increasingly steal market share away from stick-and-brick retail, causing shops to morph into smaller showroom spaces that complement e-commerce. Retail is experiencing a wide performance gap between best-in-class assets in wealthy areas

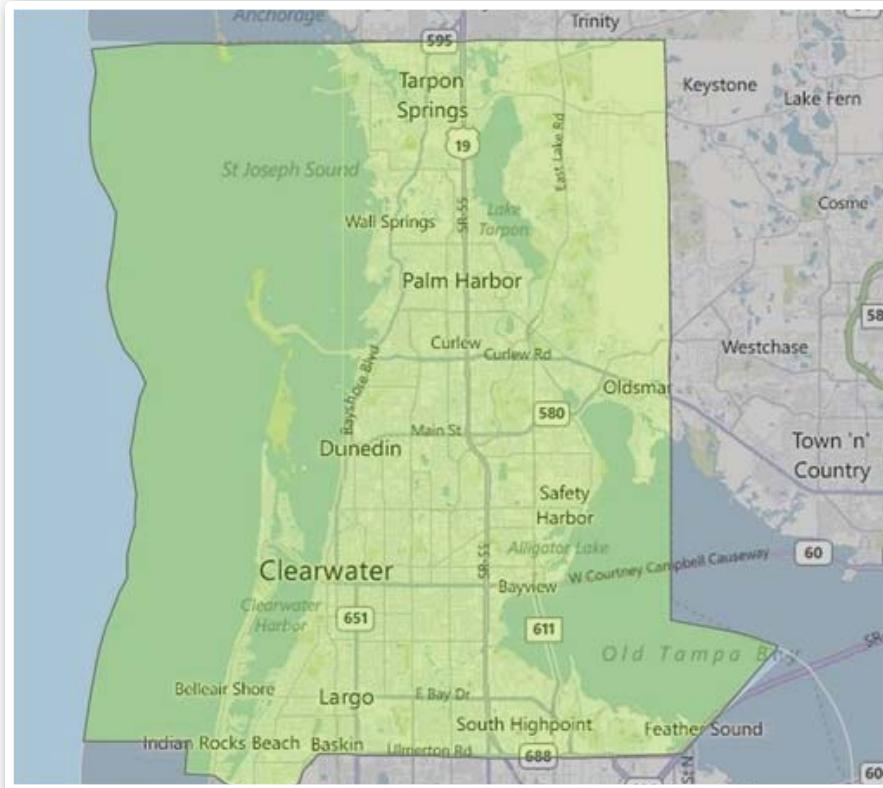
where spending has remained strong during the downturn and “other” assets which have suffered due to a reduced need for space and general consumer frugality. Vendors are shifting to smaller footprints and consolidating locations, further reducing demand at non-Class A retail across sub-types and increasing the risk of failure in all but the wealthiest locations.

Changing demographics are also affecting long-term demand for retail, bringing additional format change to the sector. The best enclosed shopping malls and lifestyle centers are top assets, followed by grocery-anchored neighborhood and community centers that offer necessity goods. Power centers, typically including big box stores, were hit hardest during the recession overall, yet the best of these assets (those that have retained the dominant remaining retailers) should have upside potential when spending increases for discretionary goods.

The Tampa MSA retail market has been suffering for the past few years since the economic downturn. There has been negative absorption, high vacancies, declining rents and almost no new construction. However, there has been recent better news similar to the rest of the nation. While total net absorption for 2011 was -178,000 square feet, fourth quarter 2011 had 135,000 square feet of positive absorption, and January 2012 saw a total of 18,000 square feet of positive absorption. In addition, vacancy was 12.2 percent at year end 2011. Similar to many areas in the US, rents have continued to decline, but at a slower pace, and appear to be stabilizing. The Tampa market overall was at \$14.08 per square foot asking rents, while Pinellas County was \$12.80 per square foot.

According to REIS Observer for Tampa in March 2012, the overall Tampa MSA market, “with construction carefully focused on strong market areas, the overall prudent development profile should persist. Community-neighborhood sector supply and demand, each with minimal totals, should strike a balance in 2012; both vacancy and rent should be essentially flat for the year. A better performance is expected for 2013.”

Figure 12. REIS North Pinellas Submarket



LOCAL COMPETITIVE MARKET

The North Pinellas Submarket (see Figure 12) is projected to hold a stable, slightly increased share of the metro area's occupied retail stock (about 22 percent of the total metropolitan area) and a decreasing share of the vacant stock. By 2015 the occupied community and neighborhood retail stock in the North Pinellas Submarket is expected to surpass eight million square feet. The retail market has long been the primary economic engine in the US 19 corridor, and the number of retail businesses compared to the County, and employees compared

to the number of households, epitomizes this fact. For example, the US 19 corridor makes up only four percent of the County's households, but makes up 12 percent of the clothing stores in the County. The corridor contains several regional malls and a plethora of community and neighborhood retail, all of which amounts to over 4.6 million square feet of retail space. Most of this stock was built in the 1970s and 1980s, and developments in the corridor have vacancies ranging from zero percent to almost 90 percent, with an overall average vacancy of 11 percent. The construction on the US 19 corridor has already caused some of the retail tenants to move and consolidate around major hubs like the Westfield Countryside Mall and the Clearwater Mall, but retail is still scattered along the corridor.

DEMAND ANALYSIS

To assess the demand opportunity for new retail in the County and the corridor, BEBR medium-high projections for Pinellas County released February 2012 were utilized. The square feet of retail supported by each household based upon a comparison of total retail square feet in the Tampa MSA from CB Richard Ellis was then compared to total Tampa MSA households from Moody's Economy.com. Esri data regarding the number of retail businesses in the study area versus the number of retail businesses in the County was utilized to determine the capture in the corridor. In addition, RCLCO determined an upside potential based upon the corridor capturing a higher amount of retail demand based upon offering new product and redevelopment. Based upon this analysis, there is the potential for between 120,000 and 220,000 square feet of new retail space in the corridor by 2030. This does not take into account any specific project for which the numbers could be higher or lower based upon a site-specific market study. The demand for the corridor is based upon the corridor's overall potential.

Office Market

The US office sector has achieved a modest rebound since the worst of the recession in 2009. The global economy is improving, with job

growth in select domestic markets leading to vacancy reductions and effective rent growth, albeit at a slow pace. Office demand should continue to be driven by traditional factors such as global economic growth and employment growth in key office-using industries. However, recent office market performance has been largely uneven, with certain “pockets of excellence” in markets experiencing strong growth in the technology and energy sectors, compared to underperforming markets plagued by pre-recession overbuilding and weak employment growth. Although the office outlook for 2012 and beyond remains cautiously optimistic, the trend toward less office space per employee represents a major threat to current office owners and developers throughout the country.

Growth in elderly populations and continued employment growth in the healthcare sector should drive medical office demand over the long-term. Domestic markets experiencing growth in aging populations should see increased demand for revamped medical office space to accommodate both the growing population as well as new technologies and services. This could have major implications for various markets in Florida and Tampa Bay, including Pinellas County.

Given these macroeconomic and demographic trends, the most attractive national office opportunities will be focused on Class A properties in central business districts, along with well-located medical office properties. Significant development of new space appears to be far off (into the next real estate up-cycle, most likely) as domestic markets continue to work through existing inventories. While the worst of the office market’s recent troubles appear to have passed, improvement will continue at a slow, methodical pace as growing business confidence leads to steady absorption of global office space.

Similar to retail, the Tampa MSA office market has suffered during the downturn, but like the rest of the country, has seen a modest rebound in office space demand due to a confidence in the economy. In 2011, there was 564,000 square feet of positive net absorption while at the same

time there were no new supply additions, allowing vacancy to drop to 20.6 percent by the end of 2011. In addition, there has been positive rent growth. According to REIS, “the robust performance seen in 2011, due mainly to the strong opening quarter, will be followed by a slower period ahead. Construction remains subdued.”

LOCAL COMPETITIVE MARKET

Despite improving office market indicators in the Tampa MSA overall, the immediate space around the corridor has a long road to recovery. In 2010 and 2011, office vacancy hovered at 30 percent in the North Pinellas Submarket, and, while it is projected to decrease significantly over the next five years, it will still likely remain upwards of 20 percent because there is a substantial amount of vacant space in the submarket that must be absorbed. In the 1990s and early 2000s, the North Pinellas Submarket had a similar vacancy rate to the Tampa MSA, between 10 percent and 15 percent, but now it is almost 10 percent higher than the MSA (at 30 percent as stated earlier, versus 20 percent in the Tampa MSA according to REIS).

Pinellas County has seen a steadily decreasing rental rate for office space (currently at \$17.00 per square foot), whereas the rental rate in the larger North Pinellas Submarket has stayed relatively steady (currently at just under \$18.00 per square foot). After the County rate peaked in the third quarter of 2007 at just over \$20.00, its average rental rate has now fallen to under \$17.00, which is lower than the Tampa MSA or the Submarket sub-area, but its vacancy rate, at about 14 percent, is also lower than either the Tampa MSA or the sub-area. This suggests that brokers/owners in the County have responded to the lack of leasing activity by dropping rental rates, and could explain why many tenants in the US 19 corridor have decided to locate out of the immediate area if they can find a “better deal” in a comparable location. Most of the office space in the corridor was built in the 1980s and 1990s and much of it is outdated and does not meet the current needs of tenants. While there is a total of 1.5 million square feet of office space in the corridor, it is parsed into small, scattered developments, most with buildings under 50,000 square feet.

DEMAND ANALYSIS

To assess the demand opportunity for new office in the County and the corridor, Florida Department of Economic Opportunity's Labor Market Information for Pinellas County employment projections were utilized to determine annual employment change in the County. To determine the amount of office demanded for each new job, several data points were compared. The total office square feet in the Tampa MSA from CB Richard Ellis was compared to total Tampa MSA employment from Moody's Economy.com, which yielded 42 square feet of office per employee. Second, office absorption from REIS versus employment growth from Moody's Economy.com from 1990 to 2010 was analyzed, which yielded 33 square feet of office per employee. Then, the capture in the corridor was determined using the average of the two methods, or 37 square feet of new office demanded per new employee, as well as Esri data regarding the number of employees in the study area versus the number of employees in the County. In addition, an upside potential based upon the corridor capturing a higher number of employees based upon offering new product and redevelopment was determined. Based upon this analysis, there are a potential 13,000 to 30,000 new square feet of office per year in the corridor for a potential total of 300,000 to 435,000 square feet within the corridor by 2030. This does not take into account any specific project for which the numbers could be higher or lower based upon a site-specific market study. The demand for the corridor is based upon the corridor's overall potential.

For-Rent Residential Market

Although the recent recession had a significant negative impact on all asset types, the national apartment sector has experienced a robust recovery, supported by broad economic and demographic trends that suggest significant pent up demand for rental housing. The major drivers for the recovery are robust job recovery in some markets that generates new household growth and release of pent-up demand, a demographic wave of young households in prime renter age groups entering the market, and continued declines in homeownership due to foreclosures

and other distress that may potentially change preferences. Although these trends may be cyclical in nature, the near-term growth in demand for rental housing appears to be the most certain trend in real estate.

A less positive, alternative medium-term economic scenario is possible for apartments if job growth fails to accelerate, or even cools off. Rent and Net Operating Income (NOI) growth projected by many investors may fail to materialize, or may slow, despite recent strong performance. The apartment market may face further challenges as developers bring meaningful supply additions to the market in various regions.

The Tampa MSA apartment market has been in recovery similar to the US. Based upon an increase in demand, development and investor activity has been strong. In 2011, almost 2,800 units were absorbed, with no new market-rate apartments being delivered, helping to decrease vacancy. REIS reports that year end 2011 vacancy was only 6.1 percent. Construction is beginning again with almost 1,500 apartment units expected to be delivered in Tampa MSA in 2012 and 2,250 new units projected for 2013. Rents have been increasing and the average asking monthly rent was \$848 per month at year end 2011. According to REIS, "While construction is on the rise, it is not expected to lose touch with demand; timely absorption of the new units is expected as the market enters a new period of supply-demand balance. Year-end vacancy rates in the neighborhood of 5.5 percent are expected for the foreseeable term. Rent growth rates are projected at 3.1 percent asking and 4.7 percent effective in 2012. Other favorable increases should follow."

LOCAL COMPETITIVE MARKET

The North Pinellas Submarket is performing similarly to the market overall. As of year end 2011, vacancy was at 4.6 percent with an average asking rent of \$888. Thirty-one different rental properties close to and within the corridor study area were considered. Of this set, the average rent was \$1.03 per square foot for apartments within the corridor study area and \$0.95 per square foot outside of the study area. Both of the areas had low vacancies at 5.4 percent. The highest rents in the

submarket are for rental properties located along the Bay. Bayside Arbor Apartments located east of US 19 on Seville Boulevard is able to achieve approximately \$1.30 per square foot, far above the local average, due largely to their location. Most of the properties in the area were built in the 1980s and 1990s, with no new product brought to the market since 2001.

DEMAND ANALYSIS

To assess the demand opportunity for new rental apartments in the County and the corridor, BEBR medium-high projections for Pinellas County released February 2012 were utilized to identify those households that are likely to become and remain renters, based on historical and recent trends on homeownership. To determine the capture in the corridor, the number of renters in the corridor versus the County overall was determined. In addition, an upside potential based upon the corridor capturing a higher number of renters based upon offering new product and redevelopment was determined. Based upon this analysis, there are a potential 50 to 100 new rental units per year in the corridor for a potential total of 500 to 1,200 new units within the corridor by 2030. This does not take into account any specific project for which the numbers could be higher or lower based upon a site-specific market study. The demand for the corridor is based upon the corridor's overall potential.

For-Sale Residential Market

The national for-sale residential market remains depressed following one of the largest housing market crashes in US history. The sector continues to experience oversupply, of both homes and lots, yet absorption has picked up modestly as the economy begins to expand. The persistent weakness of the housing sector is delaying a full recovery, yet increasing household formation and moderate employment growth should improve the demand for ownership housing over the medium-term. In addition, the recent decline in the rate of homeownership in the US represents a correction to the excesses of the boom period, rather than

a new trend line; homeownership in the U. S., including for single-family homes, continues to have appeal, and is primarily waiting for broader recovery to strengthen.

According to the State of the Cities Data Systems (SOCDS) Building Permits Database, permits in the Tampa MSA peaked in 2005 with nearly 35,000 permits pulled, far above the average annual from 1990 to 2010 which was approximately 17,000 permits. Permits bottomed out in 2010 at approximately 6,500, and, according to Moody's Economy.com, are projected to rise to over 10,000 in 2012. Starting in 2013, permits are projected to be back to 15,000, and are projected to reach over 21,000 in 2014, quickly surpassing the average from 1990 to 2010. Given historical trends, this Moody's forecast may be slightly aggressive. From 2006 to 2011, approximately 65 percent of permits were for single-family homes.

Locally, in Pinellas County, permits are not as good an indicator of health in the market, as the area is primarily built out. According to SOCDS Building Permits Database, permits peaked in 2001 at 4,400, and dropped steadily until bottoming out in 2008 at 652. They rose again in 2009, only to drop again in 2010 and reach a low of 358 in 2011. Going forward, permits in the County are projected to increase slightly and level out due to the built-out nature of the County. Since 2000, in the County, approximately 60 percent of permits have been for single-family homes. Sales during this same time have been relatively similar with an average of 40 percent of sales for multi-family and 60 percent for single-family. As of March 2012, the median sales price in Pinellas County was \$110,700, up from \$108,000 in 2011, although well below the peaks of the mid-2000s. Condo median prices are still dropping; in March 2012 the median condo price was \$79,900, whereas in March 2011 it was \$90,000. Single-family median prices are performing better; in March 2012 the median price of a single-family home sold was \$132,900, up 18 percent from the March 2011 price of \$113,000. Of the new sales that have occurred in 2012, the greatest concentration has been under \$300,000, similar to historical trends. Total sales peaked in 2005 with almost 60,000 sales in the County. Sales in 2011 were up to

almost 40,000 from their low of 30,000 in 2007. So, while the new for-sale housing market has stalled, the overall sales in the County are at two-thirds of their peak.

LOCAL COMPETITIVE MARKET

To understand prices and absorptions in the corridor, 11 nearby actively selling communities and compiled information on recent sales in the area directly surrounding the corridor were surveyed. Sales in the corridor also peaked in 2005 at 3,800, almost 5 percent of the County sales. Unlike the County, sales in the corridor have continued to bounce along the bottom, up slightly one year and down slightly the next. At year end 2011, there were 1,221 sales in the corridor. The majority of sales are for homes priced under \$200,000.

New surveyed projects in the City of Clearwater or northern Pinellas County average \$270,000 (\$135 per square foot). However, it should be noted that many of the surveyed projects are located on the beach, where the recovery for new for-sale product appears to be happening sooner. Product in the US 19 corridor would be priced at a significant discount to water-oriented product. For the most part, the projects that are selling are selling slowly and working through existing lot inventory. It will likely be some time before new for-sale residential development occurs in the area.

DEMAND ANALYSIS

To assess the demand opportunity for new homes in the County and the corridor, BEBR medium-high projections for Pinellas County released February 2012 were utilized to identify those households that are likely to become and remain owners, based on historical and recent trends on homeownership. Relative to this pool of buyers, the households that were likely to choose a single-family detached home versus an attached home were determined. Using the corridor's average capture from the Pinellas County Property Appraiser's Office data from January 2000 to February 2012, the total capture in the corridor was determined. In addition, an upside potential dependent upon the corridor achieving

higher sales based upon offering new product and redevelopment was determined. This analysis indicates a potential 40 to 60 sales per year in the corridor for for-sale residential product, with a potential total of 550 to 900 new units within the corridor by 2030. This does not take into account any specific project for which the numbers could be higher or lower based upon a site-specific market study. The demand for the corridor is based upon the corridor's overall potential.

3. MARKET POTENTIAL

Many market opportunities exist within the corridor for redevelopment; however, due to the current economic climate and road construction, the revitalization will take time. Leading investment in the corridor is likely to be residential, not high-end employment, given current market conditions for rental properties compared to other land uses. There are short-term opportunities for smaller-scale, mixed-use commercial uses. These types of opportunities require the correct sites to be identified. There is the potential to create larger-scale projects once a critical mass is created within the corridor. One of the main challenges in the corridor will be identifying sites large enough to create a catalyst for redevelopment or to create the desired job core. A job core cannot stretch for eight miles. There needs to be a sense of place and a definable core.

Due to the current mix of commercial land uses, the US 19 corridor is most similar to a retail core, which is characterized by the predominance of retail uses. Table 4 shows that within the Tampa MSA market, the corridor is most similar to the Brandon Employment Core.

After completing the analysis of each of the land uses within the corridor, the future short- and long-term opportunities, outlook for each land use, and overall functionality of the corridor were identified. Table 5 details the recommendations by land use.

Table 4. US 19 Corridor & Other Regional Job Cores

Core Type	Total Employment	% Office SF	Office SF	% Industrial/Flex SF	Industrial/Flex SF	% Retail SF	Retail SF	Jobs to HH Ratio
US 19 Corridor	32,410	25%	1.6 M	5%	306 K	70%	4.6 M	1.9
Westshore	106,800	57%	15.7 M	17%	4.8 M	26%	7.1 M	5.7
Brandon	25,000	23%	1.9 M	4%	359 K	73%	6.3 M	2.0

Table 5. Market Opportunity by Land Use

	Retail	Office	For-Rent Residential	For-Sale Residential	Short-term Opportunity
<i>Short-Term Opportunity</i>	Limited—oversupplied	Opportunistic—high vacancies, yet limited new product	Strong—vacancy low, limited new product	Limited—market for attached for-sale in weak	Longer-term Opportunity
<i>Longer-Term Opportunity</i>	Moderate—opportunity to consolidate existing	Stronger—need to create location	Strong—challenged by site availability	Stronger—with the correct site	Demand Potential to 2030
<i>Demand Potential to 2030</i>	120,000 to 220,000 sf	300,000 to 435,000 sf	469 to 1,209 units	560 to 885 units	Number of Projects
<i>Number of Projects</i>	1 to 2 centers	6 to 9 50,000 sf buildings	2 to 5 projects	6 to 9 projects	Key Tenants/ Buyers
<i>Key Tenants/Buyers</i>	Lifestyle, destination	Professional services, Finance, Insurance, Real Estate sectors	Young professionals, students, empty nesters, retirees	Young professionals, empty nesters, retirees	

Retail

There is a limited short-term opportunity for retail in the study area. While vacancies have begun to decrease, they are still too high to justify new construction except at the most ideal locations. Rents have also yet to begin to recover from their lows. In addition, the local market is currently oversupplied in nearly every category of retail shopping. Potential retail gaps/leakage in the entire County (not just the corridor) that could be appropriate in the corridor include the following: home furnishings, building and garden supply, clothing stores, book stores,

office supplies, and restaurants. These types of stores would require a strong location that functions as a destination to bring shoppers from farther locations.

The core retail strategy is to consolidate retail into nodes at key intersections. The high traffic counts in the corridor bode well for retail at key intersections. This will allow the strongest retail locations to flourish and command higher rents, while allowing marginal retail locations to transition into more appropriate land uses. There is also an opportunity to create better destinations and mixed-use projects within the corridor.

Likely, projects would be mixed horizontally (e.g., on the same site, but not stacked over each other) rather than vertically (e.g., residential over retail). The right site would be necessary to create this type of development, but there is market demand for it. Table 6 outlines the retail strengths and weaknesses in the corridor.

Office

The market for office in the corridor, as with many places in the US, is currently weak, except for opportunistic projects. Office vacancies are very high, and the space in the corridor is typically outdated. In fact, there is currently over one million square feet of vacant office space in the North Pinellas Submarket. All office buildings in the corridor are under 150,000 square feet, with an average size of 50,000 square feet. In addition, the corridor is perceived as a retail location, and therefore it may be harder to attract office tenants to the area.

While there is quite a significant amount of vacant space in the market, not all of the space is competitive in the current market. There is potential for redevelopment and the opportunity to create new buildings, if the new space better meets tenant preferences. The strongest first opportunity is to focus on the types of businesses that are currently located in the corridor (e.g., services, finance, insurance, real estate, health care), and build upon those. There is also an opportunity to create a mixed-use environment with the correct project. Table 7 lists the office strengths and challenges in the corridor.

For-Rent Residential

The demand in the area is strong for rental product. There are low vacancies, and apartment developers throughout Florida and the nation are looking for locations to construct new apartments. The highest rents in the area average \$1.32 per square foot for product on the water, high enough to justify new construction. Overall rents average over \$1.00 per square foot, still very strong. In addition, all of the apartments in the

corridor were constructed prior to 2001, creating an opportunity for new product.

As with the other land uses, the correct site needs to be located for the development of rental apartments. They would likely be walk-up, garden-style apartments, but there may be the opportunity to develop higher-density product, such as apartments that wrap around internal structured parking (the "Texas donut"), on a parcel that has both site and situational advantages from the perspective of an apartment developer. In addition, apartments would be a good use in a mixed-use project. They would likely be integrated into the project with good walking connections, but without a vertical integration of land uses. The strengths and challenges of rental apartments are laid out in more detail in Table 8.

For-Sale Residential

The short-term economic conditions for both attached and detached for-sale residential have depressed demand, but long-term demand fundamentals are strong within the corridor. The area has a lot of housing, and is well-located relative to services and employment cores. In order to sell residential within the corridor, it would likely be targeted to primary home buyers and be a value alternative to newer, more expensive product in Clearwater Beach or in downtown Tampa (the majority of attached product in study area sold for under \$100,000 in 2011). The target audience for a project within the corridor would likely be a mixture of empty nesters and retirees as well as professionals working in the area. The specific product for for-sale residential would depend upon the identified site, but would likely include some type of attached product such as townhomes, plex products, and condominiums. The strengths and challenges associated with for-sale residential are listed in Table 9.

Table 6. Retail Strengths & Challenges

STRENGTHS	CHALLENGES
High traffic counts in the corridor—certain points have between 75,000 to 100,000 traffic counts daily	Visibility—lack of signage for retailers given new limited-access road
Large population base—over 100,000 households within a five-mile radius from US 19 and SR 580	Uncertainty associated with US 19 construction and transition to limited-access
Existing reputation as a strong retail corridor	Lack of connection of retail to surrounding neighborhoods
Vacated spots available to fill and the chance to consolidate retail into hubs	Oversupply of the market—with a strong retail base, risk of oversupply increases and new retailers need to be strategic Outdated centers with high vacancy drag down rents

Table 8. For-Rent Residential Strengths & Challenges

STRENGTHS	CHALLENGES
Great access to employment cores	Most of the study area is not achieving a high dollar/sf
Well executed projects achieve a 30+ percent premium over the average in the area	Finding a piece of land large enough to allow a developer to create a good size project (250+- units)
Despite some existing product vacancy, the corridor has a high number of renters due to its superior access and could capture turnover from inside the corridor and elsewhere in the MSA	
Draw from both workforce population and 55+ population depending on product type positioning	

Table 7. Office Strengths & Challenges

STRENGTHS	CHALLENGES
Increasing employment across key industries and good regional access to potential employees and businesses	Vacancy rates have a long way to go—average office vacancy is almost 30% in the corridor
Despite decreasing rents and increasing vacancies post-2007, both stabilized in 2010-2011 and are projected to improve through 2016	Land prices and achievable rents in submarket make delivery of office space difficult
High level of services and retail space helps increase office desirability, although hard to access	Parking requirements of tenants versus available space—tenants often desire more spaces than available with the older buildings
Great proximity and connectivity to existing office cores	Competing with new office cores in greenfield locations

Table 9. For-Sale Residential Strengths & Challenges

STRENGTHS	CHALLENGES
An increasing 55+ population in the Tampa MSA and the county and strong in-migration patterns	The market collapse brought prices significantly down and recovery is coming to this area slowly
Little new condo/townhome inventory in the study area or surrounding area	Currently competing with areas that are higher-end or have less construction
Conversions of prime for-rent space possible once the area experiences greater recovery	Numerous mobile home parks and older retail creates a perception of lower quality

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PLANNING CONTEXT

Over the past few years, with the changing market conditions and roadway reconfiguration, the US 19 corridor has evolved. Stretching for 8.4 miles between the city limits at Belleair Boulevard and north of Curlew Road, the study area also includes areas along Gulf to Bay Boulevard and Drew Street between US 19 and McMullen Booth Road as shown in Figure 13. While most of the US 19 corridor study area is within the City of Clearwater, some parcels are located within unincorporated Pinellas County.

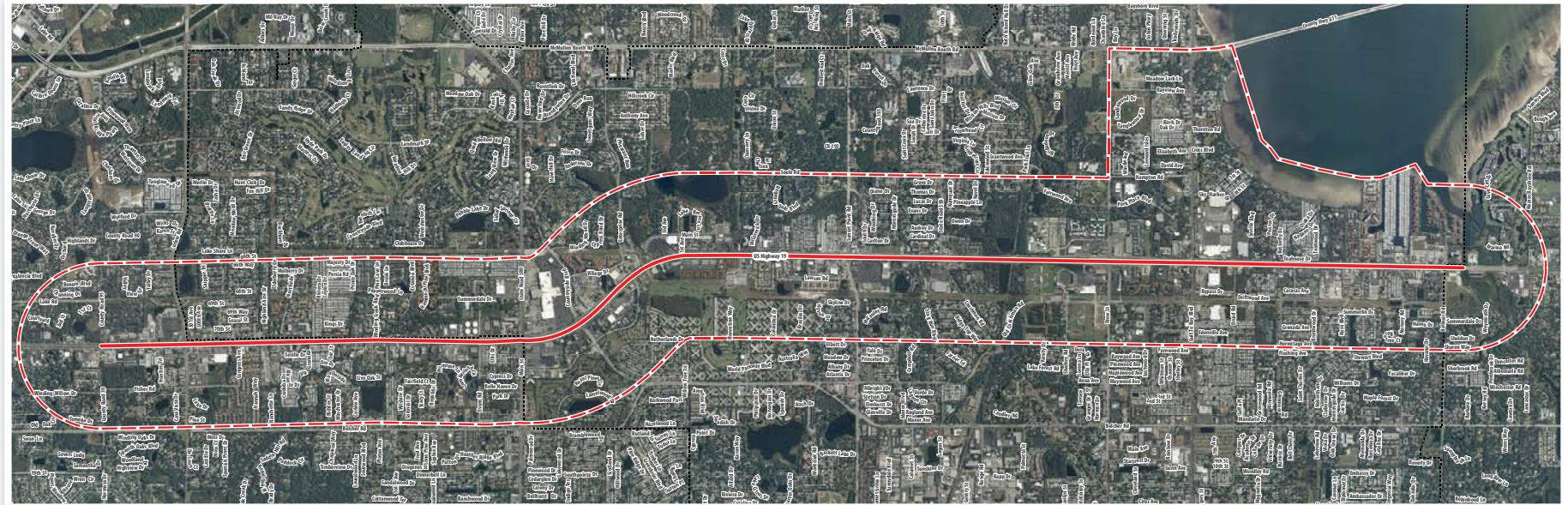
To understand the existing nature of the corridor and the policy and regulatory framework, this section of the US 19 Plan provides the planning and development context for the plan's study area. This

section provides background information regarding existing conditions that affect the future of the corridor organized and is organized by the following broad categories.

- › Land Use & Development;
- › Character & Identity
- › Parks, Trails & Open Space;
- › Planning & Policy Context; and
- › Mobility.

All maps referenced in this section can be found in Appendix A (Planning Context Maps) at the end of this plan.

Figure 13. US 19 Study Area



1. LAND USE & DEVELOPMENT

The following section documents existing land uses in the study area and provides a closer look at conditions with the potential to influence future land use and redevelopment.

Table 10. US 19 Study Area Existing Land Use

Existing Land Use	Acres	Percent
Agricultural	19.2	0.28%
Commercial	945.5	13.79%
Golf Course	155.5	2.27%
Industrial	95.6	1.39%
Institutional	455.7	6.65%
Miscellaneous (utilities, drainage, etc.)	323.0	4.71%
Office	300.5	4.38%
Residential		
Duplex, Triplex, Fourplex	48.1	0.70%
Mobile Home Community (subdivision, condominium)*	1,351.4	19.71%
Mobile Home Park**	157.2	2.29%
Multi-Family (apartments, condominiums)	957.4	13.96%
Other (boarding houses, assisted living facilities)	0.8	0.01%
Single-Family Detached	1,299.8	18.96%
Town House	176.3	2.57%
Parks & Recreation	303.3	4.42%
Vacant	267.5	3.90%
TOTAL	6,856.8	100.00%

*Mobile Home Community includes mobile homes on individual lots in subdivisions.

** Mobile Home Park includes for-rent mobile homes on parcels in single-ownership.

Existing Land Uses

The study area includes over 6,800 acres of land divided into 18,000 individual parcels. As shown in Table 10 and Map 1 (Existing Land Use), residential uses account for almost 60 percent of land uses in the study area and commercial and office uses account for a little over 18 percent. In general, parcels fronting directly on US 19 are in some form of commercial or office use and parcels just off the corridor are in residential use. Exceptions to this general pattern include multi-family apartment and mobile home park projects fronting directly on US 19 and a number of smaller parcels with commercial and office uses lining cross streets like Gulf to Bay Boulevard, Drew Street, Sunset Point Road, Enterprise Road, Countryside Boulevard, and SR 580.

Existing land uses were determined using parcel-based data available from the Pinellas County Property Appraiser's Office (PCPAO). To create the land use map and tables, Florida Department of Revenue (DOR) codes assigned by the PCPAO were evaluated, consolidated into seventeen general use categories, and used as the basis for reporting general land use by parcel. Parcels held in common ownership, such as those controlled by homeowner associations, were categorized to match the use category of the larger properties to which they are associated. For example, open space controlled by a homeowner association in a townhome development was categorized as Town House rather than Parks and Recreation.

Intensity, Value & Age

For a subset of sites in the study area, evaluations were conducted to explore levels of utilization and propensity to change. Factors such as development intensity, land and building value, and age of construction were used to identify areas with the greatest likelihood to experience a change in land use or development form.

This evaluation of utilization and development potential was conducted for an area called the “Corridor Development Area,” shown in Map 2 (Corridor Development Area). The area includes vacant parcels and those in commercial, office, industrial, institutional, mobile home park, multi-family apartments, and miscellaneous uses located immediately adjacent to US 19 and along cross streets with existing or proposed US 19 overpasses. Generally, single-family residential neighborhoods, mobile home communities, and multi-family condominiums located directly along US 19 were excluded from the analysis due to their limited potential for redevelopment. The area does, however, include a few isolated parcels between McMullen Booth Road, Drew Street, Gulf to Bay Boulevard, and US 19 with low-density residential uses, mobile home communities, and mobile home parks.

DEVELOPMENT INTENSITY

The development intensity of parcels was calculated to indicate general levels of utilization. Usually, areas with low levels of utilization are considered to have a higher potential to redevelop and those with higher levels of utilization are considered less likely to experience redevelopment pressure. Development intensities were determined by calculating the floor area ratio (FAR) for parcels in commercial, office, industrial, institutional, and multi-family use. For condominium office developments and larger retail developments with multiple parcels, consolidated FARs were calculated.

On average, development intensities along the corridor are relatively low, falling between 0.20 and 0.30 FAR. Such intensities are generally lower than those permitted under the existing future land use categories but consistent with intensities found along commercial arterials throughout the Tampa Bay region. Typical suburban forms of development like automotive dealerships, shopping centers, in-line strip centers, and stand-alone commercial buildings on pad sites tend to fall into the lower-intensity categories due in part to parking requirements and conventional development practices favoring single-story, single-use forms of development served by surface parking.

Although utilization rates are generally low, the analysis does show pockets where intensities are higher than average. As shown on Map 3 (Corridor Redevelopment Area - Development Intensity), the highest development intensities are concentrated in close proximity to the major crossroads at Countryside Boulevard, Gulf to Bay Boulevard, and Drew Street. The property with the highest intensity along the corridor, at 1.25 FAR, is also one of the only office buildings served by structured parking: Plymouth Plaza on US 19 near Countryside Boulevard. Hotels are another relatively high-intensity land use. Both the Holiday Inn Express at Gulf to Bay Boulevard (0.75 FAR or 42 units per acre) and the Quality Inn near Druid Road (0.63 FAR or 53 units per acre) are constructed at relatively high intensities.

MARKET VALUE

Assessing appraised value on a per-square-foot basis is another way to evaluate the relative performance of individual projects along the corridor. Using PCPAO parcel data, the market value of parcels was analyzed by calculating the value per-parcel-square-footage for commercial, office, industrial, apartments, institutional, and mobile home park uses. A consolidated market value per-parcel-square-footage was calculated for condominium office developments and larger retail developments with multiple parcels.

As shown in Map 4 (Corridor Redevelopment Area - Market Value), parcels with the highest value per-square-foot include the Harbourside office building at Belleair Road (\$72/square foot), Countryside Mall (\$50/square foot), a vacant commercial building on Belleair Road (\$45/square foot), the Holiday Inn Express at Gulf to Bay Boulevard (\$43/square foot), and the Drew Corner Plaza (\$41/square foot). Lower per-square-foot value parcels tended to be clustered in locations between the major cross streets. These sites included older retail strip centers, mobile home parks, and auto dealerships.

Figure 14. Low Intensity Development Along US 19 at Sunset Point Road



LOW MARKET VALUE & INTENSITY

Parcels were also evaluated to determine which have both low market value and low development intensity. Generally, these parcels are considered as having a high potential for redevelopment. As shown on Map 5 (Corridor Redevelopment Area - Low Market Value & Intensity), low value (under \$10/square foot) and low development intensity (less than 0.2 FAR) parcels are located throughout the corridor and include numerous auto dealerships, strip commercial buildings, vacant out-parcel buildings, and one-story office buildings. Other low value/low intensity parcels include Bayview Gardens and a large multi-family parcel south of Gulf to Bay Boulevard, an RV park on Bayview Avenue, and office buildings near Countryside Centre shopping plaza.

BUILDING VALUE PERCENT OF TOTAL PROPERTY VALUE

To further assess patterns of investment and potential for redevelopment, improvement values for parcels were calculated as a percent of total property value. This analysis resulted in a map showing areas with higher and lower levels of investment represented by building values relative to land values.

Areas with building values representing a high proportion of total parcel value include Countryside Mall and the surrounding office and retail parcels, multi-family and office developments along Drew Street and Park Place Boulevard, Bright House Field ballpark, First Baptist Church of Clearwater on McMullen Booth Road, and the Harbourside office building at Belleair Road. Parcels where the land value is a higher percentage of the total parcel value include auto dealerships, strip commercial buildings, mobile home parks, vacant out-parcel buildings, and one-story office buildings, as shown on Map 6 (Corridor Redevelopment Area - Building Value Percent of Total Property Value).

YEAR BUILT

Age of building construction is another factor influencing a property's competitive position and probability of redevelopment. As shown on

Figure 15. Bayview Gardens Redevelopment Site



Figure 16. New Offices at Park Place



Map 7 (Year Built), recent construction along the corridor is concentrated in a few locations. During the 1990s, a number of buildings near the intersection of Gulf to Bay Boulevard and US 19 were constructed, including the large multi-family and office projects along Park Place Boulevard and Sam's Club. More recent investments include the redevelopment of Clearwater Mall, the theater and restaurant additions at Countryside Mall, the condominiums east of the corridor off Belleair Road, and Bright House Field ballpark and training facilities.

As the map also indicates, a great number of buildings along the corridor were constructed in the 1970s and 1980s, including a few of the corridor's larger projects like Cypress Point shopping center, Countryside Centre, and several office buildings along McCormick Road. Without significant reinvestment or major changes in these older properties, such as the recent additions to 1970s era Countryside Mall, attracting

quality tenants and remaining locally- and regionally-competitive may prove difficult. These older properties may also become candidates for redevelopment, thus creating opportunities to improve the corridor's attractiveness, address connectivity and circulation challenges, and strengthen the competitive position of destinations.

(Development intensities and values were evaluated based on data collected and reported by the PCPAO, and consequently, may not reflect development intensities and values reported by the City or others. For example, development intensity for overnight accommodations and multi-family residential uses is regulated by number of units, so FAR is not typically used to report intensity for hotels and apartments, and commercial real estate entities may rely on other data when reporting building area and value. In addition, factors such as right-of-way acquisitions along US 19 and subdivision activities may change how intensities are reported over time.)

2. CHARACTER & IDENTITY

The corridor's character and the way it is viewed by local residents and visitors is strongly influenced by a number of related factors. The architectural design and form of buildings influences how places are perceived. The identity and perception of a place is also influenced by: the relationship among buildings; the size of parcels; the design and placement of parking; the quality of streets, streetscapes, and landscapes; and the quality of connections between destinations.

Although the character of areas along US 19 changes from place to place as discussed below, most areas were developed following conventional suburban models. Typical projects along the corridor include single-use, low-rise buildings set back behind simple landscape strips and one or more bays of parking. Architectural and landscape design treatments are typical of suburban locations throughout the region, streetscape and public space improvements to support pedestrian and transit travel are minimal or non-existent, and individual projects usually are not well connected to adjacent projects or nearby neighborhoods.

The corridor's major retail clusters at Countryside Boulevard and Gulf to Bay Boulevard serve as regional shopping destinations and share the characteristics of similar suburban destinations throughout the Tampa Bay region. Building types include large-format retail buildings, in-line retail strips, and stand-alone retail and office buildings on out-parcels and individual sites. Although both multi-family residential and office uses are in close proximity to retail and restaurants, deep building setbacks, the lack of a local street grid, and limited streetscape and pedestrian amenities make walking from place to place an impractical alternative to driving. The corridor's neighborhood-serving shopping destinations at Curlew Road, Sunset Point Road, and NE Coachman Road also function primarily as auto-oriented destinations. Buildings in these locations also follow conventional suburban forms and patterns

of development with building frontages set back from streets behind multiple bays of parking and stand alone buildings on out-parcels and pad sites.

In the areas located between the regional and local shopping destinations, the character of development is driven partially by parcel size. Over time, the subdivision of commercial sites along US 19 has resulted in a fragmented pattern of smaller sites with individual strip centers, retail buildings, and small offices interspersed among larger sites housing auto dealerships, mobile home parks, and low-rise apartment complexes. On average, sites in the in-between areas are smaller than those found at the cross streets, but suburban building forms and site configurations predominate.

The suburban character of the corridor, the result of both market forces and development codes in effect in the 1970s and 1980s, may limit redevelopment potential, especially in areas with relatively small parcel sizes, fragmented ownership, and that lack an interconnected network of local streets. In these more challenged areas, the form and pattern of development may limit the potential of owners to adapt to changing market conditions and attract investment as access and circulation patterns change along US 19.

The current character and quality of development also makes it difficult to distinguish between subdistricts and destinations within the study area. Due to the absence of gateway treatments signaling entry to the City and subdistricts, the generic quality of many landscape and architectural designs, and the lack of investment in streetscapes and public spaces, the corridor's image is indistinguishable from other suburban corridors in the region. The lack of a unique or compelling "brand" for the Clearwater sections of US 19 may limit the City's ability to attract investment and promote the corridor as a regional destination and attractive market development.

Figure 17. Study Area Commercial & Office Development Examples



3. PARKS, TRAILS & OPEN SPACE

The following section of the reports provides information regarding parks and recreation facilities, natural resources, open spaces, and wildlife habitat within and adjacent to the study area.

Parks, Recreation Facilities & Trails

Several existing public parks and recreation facilities are located within close proximity to the corridor. The following facilities are shown on Map 8 (Parks, Recreation Facilities & Trails):

- › Eddie C. Moore Softball Complex (Drew Street/McMullen Booth Road);
- › Kapok Park (Glen Oak Avenue);
- › Cliff Stevens Park (Fairwood Avenue);
- › Wood Valley Park (Park Trail Lane);
- › Moccasin Lake Nature Park (Park Trail Lane);
- › Joe DiMaggio Sports Complex (Drew Street);
- › Lake Chautauqua Park (Landmark Drive);
- › Enterprise Dog Park (Enterprise Road);
- › Countryside Recreation Center/Park (Sabal Springs Drive);
- › Countryside Sports Complex (McMullen Booth Road); and
- › Forest Run Park (Landmark Drive).

The area is also served by multiple, existing City and County trails and bike lanes, including the east-west Ream Wilson Trail and segments of the north-south Progress Energy Trail running parallel to US 19. Sections of the Progress Energy Trail are complete between the Ream Wilson Trail and Belleair Road and a pedestrian overpass has been constructed over US 19. Additional segments of the Progress Energy Trail and extensions to other existing trails, new trails, or bike lanes are planned within the study area, but are awaiting funding sources.

Figure 18. Joe DiMaggio Sports Complex & Bright House Field



Figure 19. Progress Energy Trail Pedestrian Bridge at US 19



Wetlands

Pockets of wetlands are located throughout the study area, concentrated primarily in areas with low elevation and within the floodplain. This includes areas along Alligator Creek and near Lake Chautauqua. The City of Clearwater's Preservation zoning district includes designated environmentally sensitive wetlands, including those subject to Florida Department of Environmental Protection (DEP) and Southwest Florida Water Management District (SWFWMD) jurisdictional wetland requirements. Wetlands locations are shown on Map 9 (Wetlands).

Wildlife Habitats

The study area also includes several Wildlife Habitats designated by the Florida Fish and Wildlife Conservation Commission (FWC). Map 10 (Wildlife Habitats) shows the following habitats and conservation areas:

- › Hot Spots (Multiple Species Habitat) - Areas representing biological diversity, created by aggregation of predictive habitat maps for wading birds, important natural communities and 44 focal species. It also includes known species and community locations.
- › Priority Wetlands Habitats - Representing wetland species "hot spot" data set created by aggregating predictive habitat maps for 35 listed wetland-dependent taxa.
- › Strategic Habitat Conservation Areas - Representing areas important to flora, fauna, and natural communities based on known occurrence information and recent land use/land cover maps. Also includes proposed lands for conservation management that are necessary to protect viable populations of 44 focal wildlife species and other analyzed elements of biological diversity that include rare plants, rare biological communities, and wetlands important for wading birds. Located along Alligator Creek in Cliff Stevens Park and Kapok Park and adjacent areas.

- › Bald Eagle Nesting Territories - Known bald eagle nesting spots located along US 19 between Harn Boulevard and Belleair Road.

Flood Hazard Areas

As defined by the Federal Emergency Management Agency (FEMA) under the National Flood Insurance Program (NFIP), there are several Special Flood Hazard Areas within the US 19 Corridor. Shown on Map 11 (Flood Hazard Areas), this includes areas along Old Tampa Bay, Alligator Creek, Lake Chautauqua, and Coopers Bayou.

4. PLANNING & POLICY CONTEXT

Future land use and development within the study area is addressed in several City plans and policy documents, most notably the *Clearwater Comprehensive Plan (Comprehensive Plan)*, the *Economic Development Strategic Plan*, and *Clearwater Greenprint*. A review of US 19-specific policies and recommendations from these plans is provided below.

Clearwater Comprehensive Plan

The Future Land Use element of the *Comprehensive Plan* offers guidance on the preferred character, pattern, scale, and density/intensity of development within the City limits. The element includes text and maps describing future land uses by category and location, and defines a citywide design structure that serves as a guide for development and land use decision-making.

FUTURE LAND USE PLAN CLASSIFICATIONS

The Future Land Use plan classifications shown in the *Comprehensive Plan* identify general land uses, maximum densities and intensities of development, and zoning districts in the City. Future land use

classifications for parcels in unincorporated Pinellas County are designated by the *Pinellas County Comprehensive Plan*.

Future Land Use in the study area is shown on Map 12 (Future Land Use). The *Comprehensive Plan* provides for a wide range of land uses fronting US 19, with plan classifications allowing for commercial, industrial, and mixed land uses on the vast majority of sites. The Commercial General classification is applied to the greatest area (633 acres), with Residential/Office/Retail (176 acres), Residential/Office General (159 acres), Commercial Limited (70 acres), Industrial Limited (47 acres), and

Residential/Office Limited (11 acres) accounting for the balance of sites with commercial, industrial, and mixed use classifications.

As shown in Table 11, maximum development intensities in these categories range from 0.65 FAR for the Industrial Limited classifications to 0.40 FAR allowed in Residential/Office/Retail and Residential/Office Limited mixed use classifications. The maximum residential density ranges from 7.5 dwelling units per acre in Residential/Office Limited to 24 units per acre in Commercial General. For overnight accommodations permitted in several of the classifications, the allowable units per acre ranges from a maximum of 30 units per acre in Residential/Office/

Table 11. City of Clearwater Existing Future Land Use Plan Classifications - US 19 Corridor

Plan Classification	Primary Uses per Plan Category	Min. and Max. Intensity	Consistent Zoning Districts
Residential/Office Limited (R/OL)	Low Density	7.5 Dwelling Units/Acre; FAR 0.40	Office (O); Low Medium Density Residential (LMDR)
Residential/Office General (R/OG)	Medium Density Residential/Office	15 Dwelling Units/Acre; FAR 0.50	Office (O); Medium Density Residential (MDR)
Residential/Office/Retail (R/O/R)	Residential; Residential Equivalent; Office; Retail; Overnight Accommodations; Personal/ Business Services	18 Dwelling Units/Acre; FAR 0.40 30 Overnight Accommodations Units/Acre; FAR 0.40	Office (O); Commercial (C); Medium Density Residential (MDR)
Commercial Limited (CL)	Office; Retail; Overnight Accommodations; Personal Services	18 Dwelling Units/Acre; FAR 0.45 30 Overnight Accommodations Units/Acre; FAR 0.45	Commercial (C); Office (O)
Commercial General (CG)	Office; Retail; Personal Services; Overnight Accommodations; Wholesale; Warehouse	24 Dwelling Units/Acre; FAR 0.55 40 Overnight Accommodations Units/Acre; FAR 0.55	Commercial (C); Office (O)
Industrial Limited (IL)	Light Manufacturing; Overnight Accommodations; Research/Development; Wholesale; Warehouse	FAR 0.65 50 Overnight Accommodations Units/Acre; FAR 0.65 (Base)* 75 Overnight Accommodations Units/Acre; FAR 0.65 (Alternative)*	Industrial, Research and Technology (IRT)

*Subject to Master Development Plan requirements in section 2.3.3.61 of the PPC Countywide Plan Rules

Retail and Commercial Limited to 75 units per acre (through the Master Development Plan requirements in the *Countywide Plan Rules*) in Industrial Limited.

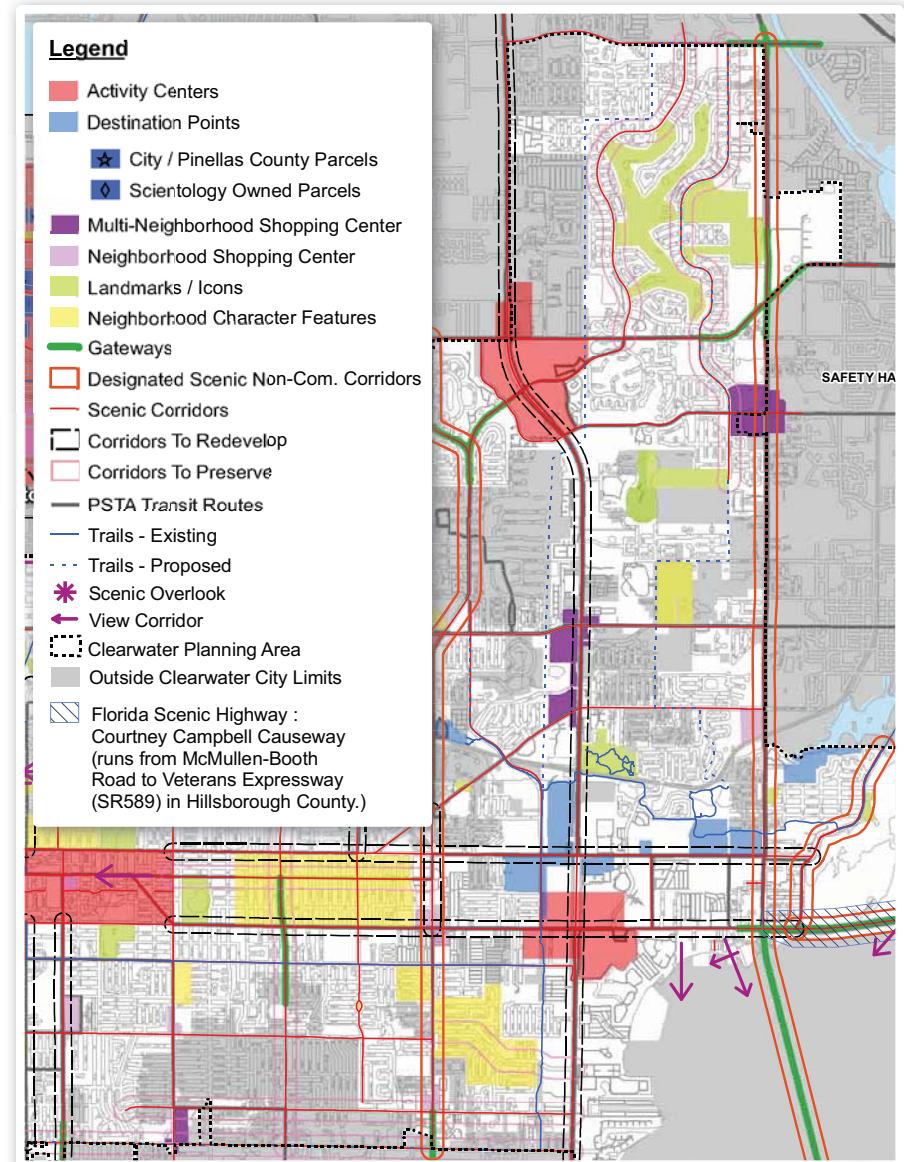
In between the major cross roads, residential and recreation/open space plan classifications are applied to a few locations, but account for a relatively small percentage of the total number of sites fronting directly on US 19. Off the corridor, plan classifications include a range of residential categories, from Residential High and Medium to lower density categories applied to existing single-family neighborhoods.

CITYWIDE DESIGN STRUCTURE

As part of the *Comprehensive Plan*, the City of Clearwater established a Citywide Design Structure comprised of a hierarchy of places and linkages, as shown in Figure 20. This design structure serves as a guide to development and land use decisions and provides policy guidance regarding the future of destinations. The following places and corridors in the study area have been designated as part of this design structure:

- › Activity Center (Countryside Mall, Clearwater Mall) - High-intensity, high-density multi-use areas designated as appropriate for intensive growth and routinely provide service to a significant number of citizens of more than one county. Activity Centers are proximate and accessible to interstate or major arterial roadways, and are composed of multiple destination points, landmarks, and neighborhood centers and character features.
- › Destination Point (Bright House Field, Eddie C. Moore Softball Complex, St. Petersburg College-Clearwater Campus and surrounding area) - Active, man-made features that create community-wide interest in an area and draw people to them.
- › Multi-Neighborhood Shopping Center (Sunset Point Plaza and Walmart Shopping Area) - Commercial establishments that serve more than one neighborhood and these can be pedestrian friendly or automobile oriented.

Figure 20. Citywide Design Structure Map



City of Clearwater Comprehensive Plan - 2008

- › Landmarks (“Natural” Landmarks: Moccasin Lake Nature Park, Countryside Country Club, Lake Chautauqua and Chautauqua Park South)- Passive natural or man-made features that are prominent or well-known objects in a particular landscape, as well as features and facilities that build pride in local residents.
- › Gateways (US 19 at Belleair Road, Courtney Campbell Causeway) - Entryways to the City of Clearwater;
- › Trails (existing and proposed trails discussed in the previous section) - Paved bicycle/pedestrian corridors designated and restricted to non-motorized traffic, built to standards that provide a high degree of safety, efficiency and comfort for the user, while reflecting the unique circumstances of the trail’s location.
- › Scenic Corridors (Primary Corridors include Gulf to Bay Boulevard and US 19; Secondary Corridors include Belleair Road, Countryside Boulevard, Curlew Road, Drew Street, Enterprise Road, Nursery Road, Old Coachman Road, SR 590, and Sunset Point Road) - Corridors which have particular significance, in terms of tourism, economic development, or community character, and should have enhanced and differentiated landscaping requirements.
- › Preservation Corridors (Belleair Road, Harn Boulevard, and Nursery Road) - Corridors or portions of corridors that need to be preserved for their unique character.
- › Redevelopment Corridors (Drew Street, Gulf to Bay Boulevard, US 19) - Corridors or portions of corridors that need a character change or restoration to a better condition.

Table 12. City of Clearwater Transit-Oriented Development (TOD) Future Land Use Plan Classifications

Plan Classification	Primary Uses per Plan Category	Min. and Max. Intensity *	Consistent Zoning Districts
Transit Oriented Development (TOD)			
Transit Station Area Type I: Urban Center Downtown	Residential; Office; Retail; Institutional; Public/Semi-Public	FAR 3.0-10.0 (40-100 Dwelling Units Per Acre) within 1/8 mile radius of the transit station FAR 1.5-7.0 (40-100 Dwelling Units Per Acre) between 1/8 mile radius of the transit station and the station area boundary	Transit Oriented Development**
Transit Station Area Type II: Suburban Center	Residential; Office; Retail; Institutional; Public/Semi-Public	FAR 0.5-5.0 (30-50 Dwelling Units Per Acre)	Transit Oriented Development**
Transit Station Area Type III: Neighborhood Center	Residential; Office; Retail; Institutional; Public/Semi-Public	FAR 0.5-3.0 (10-20 Dwelling Units Per Acre)	Transit Oriented Development**
Transit Station Area Type IV: Complete Street Corridor	Residential; Office; Retail; Institutional; Public/Semi-Public	FAR 0.5-2.0 (10-20 Dwelling Units Per Acre)	Transit Oriented Development**

*The Transit Oriented Development (TOD) categories are assigned a minimum and maximum intensity standards measured in terms of floor area ratio (FAR) and inclusive of residential and non-residential square footage. If a development has a residential component, the residential use shall be limited to the dwelling units per acre ranges specified for each TOD category. Development intensity shall be greatest within a core of approximately 1/8th mile from the center of the transit station area and transition to lower intensities with increasing distance from the center.

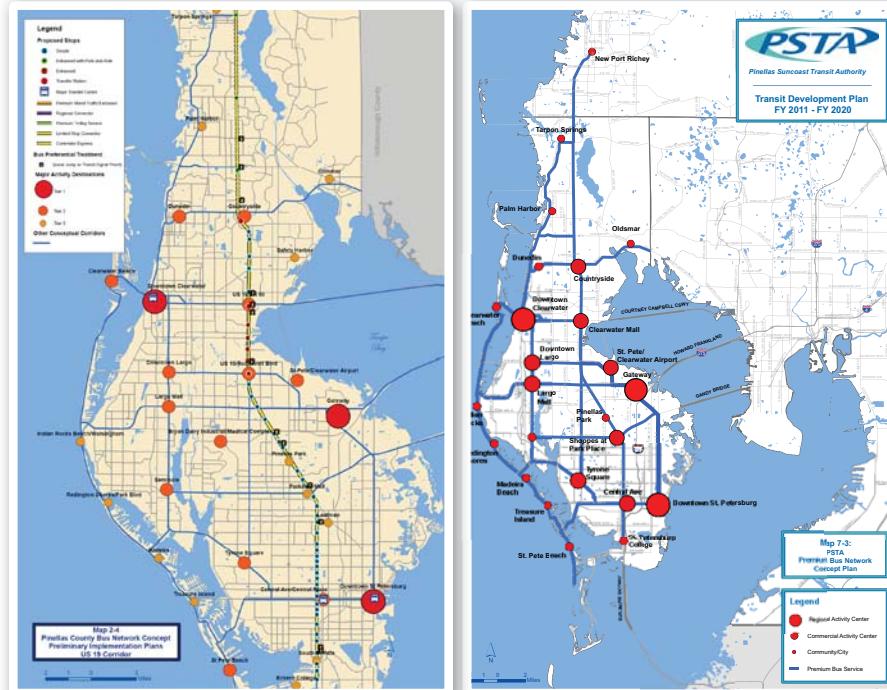
** The general term for the zoning district “Transit Oriented Development” will be used until the station locations are determined and transit station area plans are developed, at which time the zoning district will be specific to the geographic location of the transit station area.

TRANSIT-ORIENTED DEVELOPMENT

In 2010, the City amended the *Comprehensive Plan* to include policies for transit-oriented development (TOD). These policies are based on Tampa Bay Area Regional Transportation Authority (TBARTA) guiding principles and Pinellas Planning Council (PPC) Countywide Future Land Use Plan Categories and *Countywide Plan Rules*. Table 12 provides an overview of the City's new plan classification categories for TOD including uses, intensity standards, and consistent zoning districts.

According to the City's *Comprehensive Plan* policy A.6.10.1, these TOD categories will guide planning for transit stations that are part of a

Figure 21. Pinellas County Secondary Transit Corridors



Left: Pinellas County Bus Network Concept Preliminary Implementation Plans - US 19 Corridor. Right: PSTA Premium Bus Network Concept Plan.

rail or fixed guideway system as established in the Pinellas County Metropolitan Planning Organization (Pinellas MPO) 2035 *Long Range Transportation Plan* (LRTP). Specific station locations and typologies will be determined at the conclusion of the Pinellas Alternatives Analysis (AA). According to PPC *Countywide Plan Rules*, TOD plan classifications can be used for two types of transit corridors: Primary Transit Corridors are defined as the Locally Preferred Alternative (LPA) adopted by the Pinellas MPO LRTP and Secondary Transit Corridors are those designated by the Pinellas MPO *Countywide Bus Rapid Transit Concept Plan* (BRT Concept Plan) prepared in March 2009 or the Pinellas Suncoast Transit Authority (PSTA) *Transit Development Plan Major Update FY 2011-2020* (TDP). The City can amend the *Comprehensive Plan* to include transit station area planning for Secondary Corridors, including US 19.

Zoning

Land development and zoning within the study area is controlled by the City of Clearwater *Community Development Code* for parcels within the City limits or the Pinellas County Land Development Code for parcels within unincorporated Pinellas County.

As shown in Map 13 (City of Clearwater Zoning), the majority of City of Clearwater parcels within the study area, with direct frontage on US 19 or Gulf to Bay Boulevard, are within the City's Commercial (C) Zoning District. Other City zoning districts within the study area include:

- › High Density Residential (HDR);
- › Industrial (IRT);
- › Institutional (I);
- › Medium Density Residential (MDR);
- › Medium High Density Residential (MHDR);
- › Mobile Home Park (MHP);
- › Office (O);
- › Open Space & Recreation (OSR);
- › Preservation (P); and
- › Tourist (T).

For unincorporated portions of the study area located north of SR 580/Main Street, land development and zoning are controlled by the Pinellas County *Land Development Code*. The primary County zoning district for parcels directly on US 19 is Commercial Parkway (CP-1 or CP-2). Pockets of industrial parcels are within the Light Manufacturing and Industry (M-1) district and mobile home residential parcels are within the Residential, Mobile Home Parks and Subdivisions (R-6) or Rural Residential (R-R) districts.

Economic Development Strategic Plan

In August 2011, the City approved the *Economic Development Strategic Plan* to evaluate the economic challenges facing Clearwater, evaluate opportunities, and establish guiding principles, goals, and priority strategies to best position the City for future investment. One of the City's goals is to "encourage the development of sites and buildings needed to accommodate higher intensity employment opportunities."

Since two-thirds of the City's property tax base is from residential development, the City understands the importance of encouraging employment uses to help diversify the tax base and ensure long-term vitality. Promoting higher intensity employment uses will be difficult given increased regional competition, the existing stock of commercial and industrial buildings in Clearwater, and lack of available greenfield sites, but adjustments to the City's land development policies and regulations could set the stage to attract target industries and higher income jobs.

To accomplish this goal, the *Economic Development Strategic Plan* included a policy to "establish an employment center overlay to encourage higher-wage employment in strategic locations." The plan references the US 19 and Gulf to Bay Boulevard corridors as logical places for the creation of a regional employment center given their access and existing professional office developments. However, existing barriers to the creation of an employment district in this area, including some

aspects of the current zoning such as height restrictions and existing commercial retail development pattern need to be addressed. The plan recommends the creation of a fixed overlay district to encourage redevelopment and infill along the US 19 corridor. Specific actions outlined as part of this strategy include:

- › Establish a new overlay district to encourage new Class A office developments along US 19;
- › Consider applying the employment center overlay to the areas between Gulf to Bay Boulevard and Drew Street appropriate for higher intensity commercial office development;
- › Utilize the overlay district to encourage commercial office development on sites currently occupied by strip center retail, RV parks, and mobile home parks; and
- › Collaborate with neighboring jurisdictions on commissioning a US 19 corridor study.

Clearwater Greenprint

Prepared as the community's sustainability plan, *Clearwater Greenprint* identifies a series of tangible actions across eight topic areas that have the potential to reduce energy consumption, pollution and greenhouse gas (GHG) emissions, while stimulating the local economy and improving the quality of life. Approved in December 2011, the plan was developed by the City of Clearwater with grant funding from the US Department of Energy. As the framework plan to guide local government, resident, and business actions, the plan's recommended strategies provide a foundation for addressing sustainability issues for the next 25 years.

Clearwater Greenprint includes measurable, achievable strategies that the City and local residents can take to help accomplish major goals such as lessening the amount of GHG emissions, making buildings and transportation systems more energy-efficient, expanding mobility choices, maintaining a healthy economy, creating "green" jobs, reducing

waste generated by residents and businesses, and encouraging locally-grown foods. Some of the *Clearwater Greenprint* strategies will result in policy changes to the City's *Comprehensive Plan* and Community Development Code, and many of the strategies directly relate to US 19 and the area surrounding it.

According to the *Clearwater Greenprint*, the "ability to easily and affordably travel within the City using multiple forms of transportation is essential to a healthy local and regional economy." Transportation is an important consideration in the effort to create a sustainable city. As one of the major thoroughfares in the City with many important destinations, transportation-related strategies that directly relate to US 19 include:

- › Adoption of a Complete Streets policy that establishes transit, walking, and biking as priority policies;
- › Continue to support the improvement and expansion of the PSTA system; and
- › Continue to plan for and implement congestion management activities and other improvements to increase the operational efficiency of the transportation system.

Clearwater Greenprint identifies commercial corridors and existing activity centers among the best opportunity locations to accommodate new growth. The study area includes many of the City's primary commercial corridors and activity centers. To accomplish anticipated growth and redevelopment in the study area and other similar areas in the City, one of the land use and urban form-related strategies identified in the plan calls for the development of incentives for energy-efficient infill development and redevelopment in activity centers and commercial corridors. This could be accomplished by completing the following specific actions:

- › Update the *Comprehensive Plan* to define the US 19 from Countryside Boulevard to Belleair Road as an Energy Conservation

Corridor and the areas around the Countryside Mall and Clearwater Mall as an Energy Conservation Area.

- › Update the *Community Development Code* to establish policies and regulations for these areas related to permitted uses for localized energy production (i.e., solar installations), food production, landscape requirements, transportation facilities, site lighting, and parking requirements. The City will consider creating a zoning district overlay with additional site development standards, density and intensity requirements, energy-efficiency and conservation measures for new construction and substantial renovation, parking requirements, and level of service standards for sidewalks, bicycle facilities and transit.
- › Continue to provide for mixed-use development in livable, transit-oriented neighborhoods in the *Comprehensive Plan* and *Community Development Code*; and
- › Build on TOD policies in *Comprehensive Plan* and provide clear design standards for TOD in station areas and transit service corridors.

Other land use and urban form strategies directly related to the US 19 plan include:

- › Transform vacant and other underutilized properties from liabilities to assets that provide long-term economic, social, and environmental benefits;
- › Create policies and strategies to improve the citywide balance of housing to jobs and encourage the development of housing to enable residents to remain in the city as their housing needs change; and
- › Increase the amount of urban greenspace, natural areas, and tree canopy through planting, preservation, community education, and outreach programs.

5. MOBILITY

While the redesign of US 19 over the next few years will bring improved regional access to many locations along the corridor, residents, businesses, and property owners within the study area are faced with numerous challenges associated with ongoing construction and changing access and circulation patterns.

This redesign will create access challenges, especially for "in-between" properties on US 19 that are not located at a major crossing point. The existing street network adjacent to US 19 is fragmented and there is poor connectivity between parcels. Additional challenges include minimal existing accommodations for bicycle and pedestrian movement along and across US 19, poor connections between US 19 properties and adjacent neighborhoods, and poor connections between transit stops and destinations along the corridor. The following

Figure 22. US 19 South of Enterprise Road

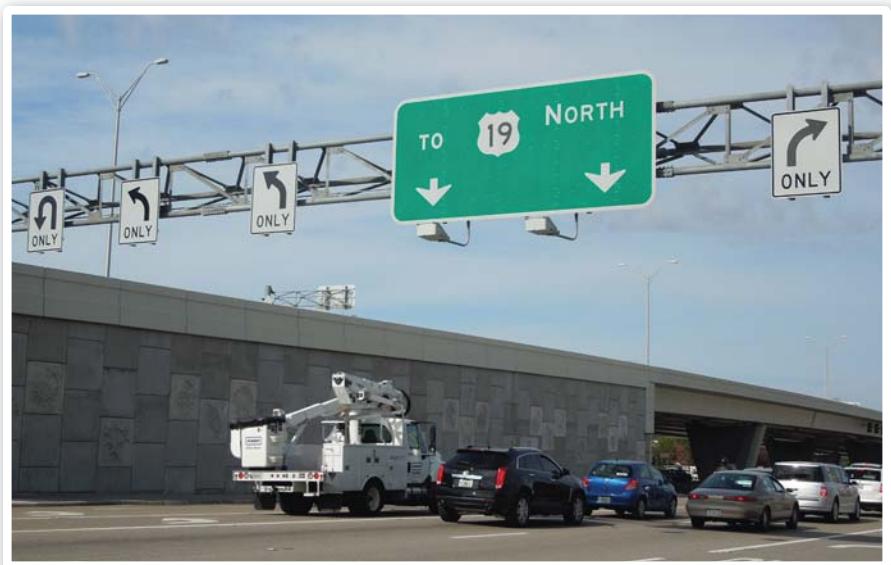


section provides a review of existing and planned vehicle connectivity, the condition of existing public rights-of-ways, bicycle and pedestrian accommodations, and the existing and plan transit network.

Vehicle Access & Circulation

As shown in Map 14 (Vehicle Access & Circulation), besides US 19, there are 23 roadways that are functionally classified as minor collectors or higher-level facilities within the study area. Currently, 19 of these roadways intersect or cross US 19. The eventual redesign of the highway will eliminate many of the east-west connections across US 19. Once completed, east-west connections across US 19 will continue at Curlew Road, SR 580/Main Street, Countryside Boulevard, Sunset Point Road, SR 590/NE Coachman Road, Drew Street, Gulf to Bay Boulevard, Seville Boulevard, and Belleair Road. An additional u-turn is planned between Curlew Road and SR 580/Main Street. Continuous frontage roads are planned for the length of the corridor with a break between

Figure 23. US 19 Frontage Road



SR 590/NE Coachman Road and Drew Street as US 19 elevates over a railroad crossing and Alligator Creek.

Within the study area, US 19, Gulf to Bay Boulevard, SR 580/Main Street, and McMullen Booth Road are the principal arterials that provide regional connections. SR 590/NE Coachman Road, Sunset Point Road, Belleair Road, and Curlew Road are minor arterials that intersect with US 19 and will continue to provide east-west connections within the City and surrounding area. Other roadways that provide east-west connection across the study area include several major collectors that will continue to provide access when US 19 improvements are complete: Old Coachman Road, Countryside Boulevard, and Drew Street. Other major collectors that will not provide an east-west connection in the future include: Enterprise Road, Northside Drive, Druid Road, Harn Boulevard, and Nursery Road.

Currently, the average existing spacing of functionally classified roadways is approximately one-half mile, which is too sparse to provide the infrastructure that is typically required to support a successful transit-oriented development. Further, only a handful of roadways are available within one-half mile to the east and west of US 19 to collect traffic parallel to US 19. As such, the study area is heavily reliant on a limited number of roadways to facilitate traffic flow within the area. This has resulted in wider roads with higher traffic volumes, which do not provide welcoming or efficient environments for transit service, pedestrians, or bicyclists. As traffic volumes continue to increase over time, the small number of roadways will see a continued decrease in performance and worsening roadway level of service (LOS) across the network.

Road Network Level of Service (LOS)

Map 15 (Road Network Existing Level of Service - 2011) shows the existing roadway LOS for arterial and collector level roadways based on available traffic count data as reported in the Pinellas MPO 2011

Level of Service Report adopted September 14, 2011. As shown, much of US 19 is currently operating at LOS F. Some sections that have already been improved to partially controlled access are operating at LOS D. Two cross streets in the study area are currently operating at LOS F (SR 60/Gulf to Bay Boulevard east of US 19, and NE Coachman Road west of US 19), while one cross street segment is operating at LOS E (SR 60/Gulf to Bay Boulevard west of US 19). In addition, three cross streets are currently operating at LOS D (Belleair Road, Drew Street, and Sunset Point Road, all west of US 19).

Bicycle & Pedestrian Circulation

Bicycle and pedestrian circulation along US 19 and in the adjacent area is challenging for several reasons as discussed below.

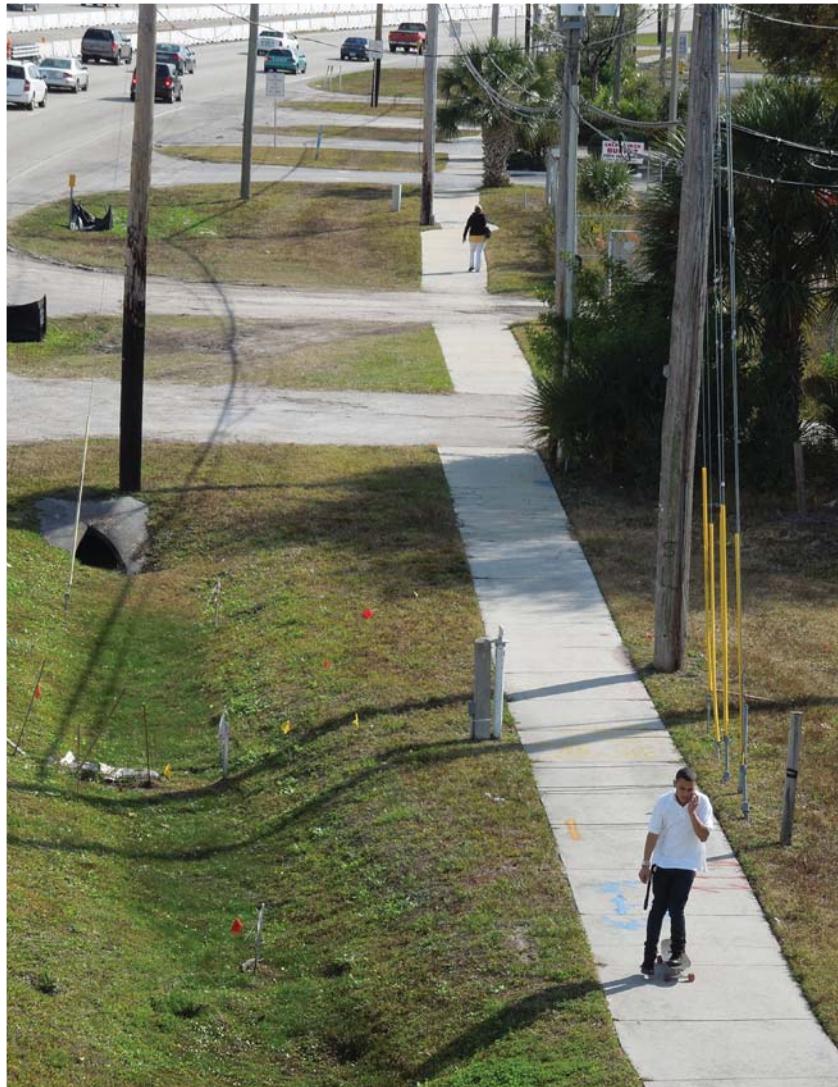
BARRIER TO TRAVEL

US 19 is a high-speed, wide, urban freeway that presents an intimidating barrier to travel by foot or by bike. There are limited crossing opportunities, and where crossing opportunities are provided, the intersections are large and typically have heavy traffic volumes. With the proposed ultimate configuration of US 19 as a partially controlled access road, there will only be ten locations available for vehicle, bicycle, and pedestrian movements to cross US 19 over a 7.8-mile distance between Belleair Road and Curlew Road—an average of one crossing point every 0.9 mile. The long distances between available crossing points makes walking between properties on opposite sides of the corridor impractical. It also makes transit usage inefficient. Frequently, a pedestrian may have to ride transit in the "wrong" direction in order to reach a crossing point and then walk across to the opposite side of US 19 to travel on transit in the desired direction.

SIDEWALKS ON MAJOR ROADWAYS

While sidewalks exist along both sides of nearly all of US 19 within the study area today, in the proposed ultimate configuration, the vast

Figure 24. Examples of Pedestrian Conditions Along US 19 Corridor



majority of the sidewalks are located at the immediate back of curb alongside the US 19 frontage roads. This is not the preferred sidewalk placement to provide a comfortable, welcoming, and safe walking environment with amenities such as shade trees and benches and a sense of separation for pedestrians from high-speed drive lanes. Map 16 (Existing Sidewalk Network) shows the existing coverage of sidewalks within the study area. Most arterial and collector classified cross-streets along the US 19 corridor have sidewalks on both sides, but there are gaps in the sidewalk network in a number of locations on these streets including:

- › Belleair Road, west of US 19 on the south side;
- › Nursery Road, in the southwest corner of the US 19 intersection;
- › Seville Boulevard, east of US 19 on both sides, except a short segment on the south side of the road;
- › NE Coachman Road, in the southwest corner of the US 19 intersection;
- › Enterprise Road, south of SR 580 on both sides (the east side has an approximate 600-foot gap, and the west side has an approximate 1,300-foot gap);
- › Republic Drive, west of US 19 on the south side (although the gap exists only for one parcel west of US 19);
- › 298th Avenue North, east of US 19 on both sides;
- › CR 95, east of US 19 on both sides; and
- › CR 39, west of US 19 on the south side beyond the first parcel.

SIDEWALKS ON LOCAL ROADWAYS

As shown on Map 16, a large percentage of local streets that connect to or are located within one-half mile of US 19 are missing sidewalks or they are discontinuous.

BICYCLE FACILITIES

Exclusive bicycle facilities are few and far between. Without bicycle facilities, bicyclists either have to share busy travel lanes with vehicle traffic or share narrow sidewalks with pedestrians. US 19 is proposed to have bicycle lanes along the frontage roads along most of the corridor. However, most sections that have been completed to date do not have bicycle lanes or have discontinuous facilities. Further, only three cross streets have bicycle lanes (Drew Street in the immediate vicinity of the US 19 interchange; Sunset Point Road both east and west of US 19; and Curlew Road west of US 19, although the eastbound lanes currently end at Fisher Road). While there are numerous off-street trails that are planned to connect to and across the study area, there are only a few completed sections today. These include portions of the Progress Energy Extension of the Pinellas Trail, including the existing overpass just south of Enterprise Road, and the Ream Wilson Clearwater Trail. Map 8 (Parks, Recreation Facilities & Trails) shows the existing and proposed on-street bicycle lanes and off-street trails within the study area.

Existing & Proposed Transit Network

The study area is served by several existing PSTA bus routes with numerous stops located along the corridor and major roadways that cross US 19. As shown on Map 17 (Existing & Proposed Transit Service), an existing HART express bus route connecting Clearwater to Tampa serves the southern half of the study area with stops along the corridor's two Park and Ride locations on Drew Street and Gulf to Bay Boulevard.

Expanded transit service is planned for the study area. As shown in the Pinellas MPO LRTP, enhanced bus service is planned for several major roadways within the study area, including US 19, Gulf to Bay Boulevard, McMullen Booth Road, SR 580/Main Street, and Curlew Road. The 2009 *Countywide Bus Rapid Transit (BRT) Concept Plan* calls for a north-south

Figure 25. PSTA Bus Service on US 19



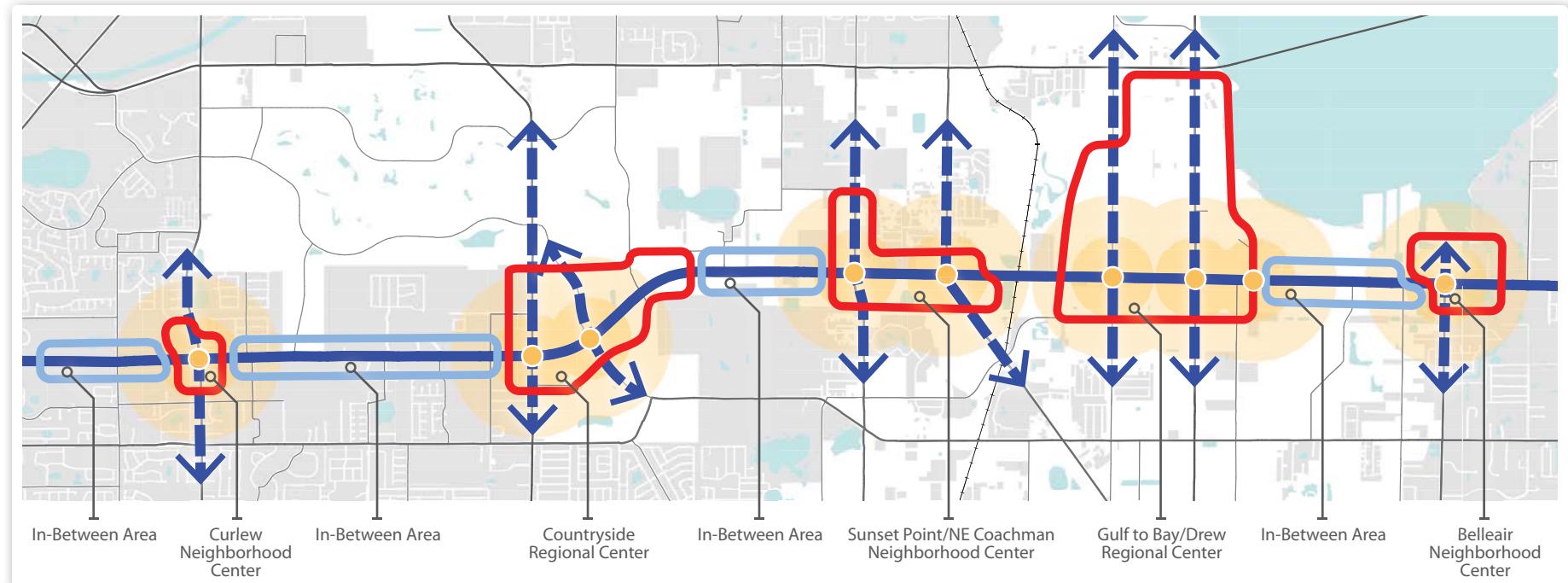
regional BRT service along US 19 with several stop locations at key intersections along the corridor (Curlew Road, Countryside Boulevard, 1st Avenue North, 3rd Avenue North, Sunset Point Road, SR590/NE Coachman Road, Drew Street, Gulf to Bay Boulevard, Harn Boulevard, Belleair Road). Two different types of service are called for along the corridor: Limited Stop Connector south of Countryside Boulevard and Commuter Express north of Countryside Boulevard:

- › Limited Stop Connector. Daytime service (6:30 am to 7:30 pm) with 20-minute peak-hour frequency and 30-minute non-peak frequency, and
- › Commuter Express. Peak-hour service with 30-minute peak-hour frequency.

FRAMEWORK PLAN & CONCEPTS

This section of the plan describes the long-term vision and objectives for development and redevelopment along the US 19 corridor. The section includes a Framework Plan defining three types of revitalization areas—Regional Centers, Neighborhood Centers, and In-Between Areas—and a series of Concept Studies illustrating development and redevelopment potential at key locations. Together, the Framework Plan and Concept Studies communicate important planning ideas and design principles, and serve as a guide for decision-makers, property owners, tenants, and residents.

Figure 26. Plan Framework Map



1. FRAMEWORK PLAN

As shown in Figure 26, the Plan Framework Map identifies three types of revitalization areas—Regional Centers, Neighborhood Centers, and In-Between Areas—and offers guidance regarding the appropriate intensity, form, and character of development for each. The areas were defined based on a review of conditions affecting development potential, including existing land use, regional and local accessibility, and planned improvements for regional roadways and transit service.

Table 13. Framework Plan Place Types

Place Type	Use Mix	Building Form & Character	Connectivity & Mobility	Floor Area Ratio (Max.)	Dwelling Units/Acre (Max.)
Regional Centers	Regionally-significant clusters of mixed-used development with an emphasis on employment-intensive and transit-supportive uses.	Urban forms of development with buildings placed to define pedestrian-friendly streetscapes and parking in mid-block locations.	Destinations with multiple points of access to US 19 served by enhanced transit service and interconnected networks of walkable streets and drives.	2.5	50
Neighborhood Centers	Centers of neighborhood activity with neighborhood-serving retail and professional service, higher-density residential, and office uses.	Buildings with active ground-level uses aligned along pedestrian-friendly streetscapes. Parking and auto-oriented facilities located to the side and rear of buildings.	Destinations with strong connections to local street networks served by enhanced transit service and better connections to surrounding neighborhoods.	1.5	50
In-Between Areas	Areas transforming from strip commercial to a wider range of land uses, with office and other employment-intensive uses favored over smaller-scale retail uses.	Buildings oriented toward US 19 with modest front setbacks to accommodate landscaping and no more than a single bay of parking. Parking and auto-oriented facilities like drive-through windows located to the side and rear of buildings.	Improved cross-parcel movement and connections to local street network. Potential for circulator service connecting these areas to Regional Centers, Neighborhood Centers, and planned BRT stations.	1.5	30

Generally, the areas incorporate commercial and multi-family residential developments fronting US 19 and major crossroads, and include sites identified as having long-term potential for development or redevelopment. Residential single-family developments, residential projects in condominium ownership, and larger-scale natural areas are not identified as revitalization areas.

Provided below and summarized in Table 13 is a brief description of each area along with general recommendations regarding future land use, development potential, and mobility enhancements.

Regional Centers

The Plan Framework Map identifies two areas as Regional Centers—the area between SR 580 and Enterprise Drive and the area between Drew Street and Gulf to Bay Boulevard. These areas, with regionally-recognized clusters of retail destinations, emerging concentrations of office uses, and a variety of housing types, share several important characteristics. Each area is particularly well served by road networks, benefits from multiple points of access to US 19, and includes several large sites in single-ownership, an important factor affecting the long-term potential for development and redevelopment.

Figure 27. Regional Center Character Images



Regional Centers

As redevelopment and intensification occurs along the corridor, areas designated as Regional Centers will take on a more urban character, with taller, mixed-use buildings aligned along pedestrian-friendly streets and public spaces. Complete street designs, better connections among destinations, and the integration of enhanced transit service will increase the potential for internal trip capture and reductions in vehicle miles traveled.

These areas should be positioned as favored locations for high-intensity office, residential, retail, institutional, and sports and entertainment uses. Through increased intensities and densities, the implementation of standards requiring urban forms of development, and public investment in streetscape and transit service, these areas have the greatest potential to serve as attractive, regionally-competitive, mixed-use destinations.

USE MIX & INTENSITY

Regional Centers are appropriate for mixed-use development with an emphasis on employment-intensive and transit-supportive uses including office, retail, higher-density residential, and lodging uses. To support revitalization and redevelopment, development intensities of up to 2.5 FAR for office/commercial uses and densities of up to 50 dwelling units per acre for residential uses may be permitted.

BUILDING FORMS & CHARACTER

Regional Centers are appropriate for a variety of building types with taller buildings up to eight-stories located along US 19 and lower buildings located near adjacent residential areas. To define the pedestrian realm and create a distinctive sense of place, buildings should be placed along site and block perimeters with modest or no setbacks and heights should be generally consistent along street frontages and across streets. Surface and structured parking should be located in mid-block and rear yard locations to avoid negative impacts on pedestrian streets and public spaces.

CONNECTIVITY & MOBILITY

To improve regional access, the City should continue to support efforts to improve existing transit service, complete plans for BRT service, and explore the potential for a circulator service connecting the two centers. To improve connections within the centers, the City should explore the potential to create an interconnected network of local streets, drives, and pedestrian ways. Wayfinding signage should play a role in helping visitors travel to and from local destinations.

Neighborhood Centers

The Plan Framework Map identifies three areas as Neighborhood Centers—the area at the intersection of US 19 and Belleair Road, the area between NE Coachman and Sunset Point Roads, and the area at the intersection of US 19 and Curlew Road. Under the plan, these areas will continue to function as important local shopping and employment destinations, and through redevelopment and the incremental improvement of existing properties, will evolve into more attractive, walkable, and connected places.

Though not planned for the intensity of development as recommended for the Regional Centers, densities and intensities in these areas may be increased to take advantage of access to US 19, local cross streets, and planned transit enhancements. These areas should be planned for neighborhood-serving retail and professional services, for-sale and for-rent residential, and smaller office uses. Through improvements and reinvestment in existing properties, modest increases in densities and intensities, and public investment in streetscape and transit improvements, these centers can become attractive, vital centers of neighborhood activity.

USE MIX & INTENSITY

Neighborhood Centers are appropriate for mixed-use development with an emphasis on employment-intensive and transit-supportive uses such as office, neighborhood-serving retail and professional services, higher density residential, and lodging uses. To support revitalization and redevelopment objectives, development intensities of up to 1.5 FAR for office/commercial uses and densities of up to 50 dwelling units per acre for residential uses may be permitted.

BUILDING FORMS & CHARACTER

Neighborhood Centers are appropriate for a variety of building types with typical heights between one and four stories and slightly

Figure 28. Neighborhood Center Character Images



Neighborhood Centers

Areas along US 19 designated as Neighborhood Centers are planned as local shopping destinations, places for small-scale office and professional service uses, and community gathering spaces. Street and streetscapes enhancements will be designed to improve local access, connect nearby neighborhoods to destinations, and better accommodate pedestrians, cyclists, and transit service.

Figure 29. In-Between Area Character Images



The In-Between Areas

Areas along the corridor located between the Regional and Neighborhood Centers will transform over time to accommodate more employment-intensive office, technology, and research and development uses and higher-density residential uses. Recommendations for improved connectivity and greater consistency in front setbacks and landscaping will enhance attractiveness and improve marketability.

taller buildings allowed with appropriate transitions to surrounding neighborhoods. Buildings should be placed to define streets and public spaces, with active street-level uses, including retail and restaurant uses, located along streets designed to support higher levels of pedestrian travel. Parking and auto-oriented facilities like drive-through facilities should be located to the side and rear of buildings and designed to minimize negative impacts on pedestrian movement and public spaces.

CONNECTIVITY & MOBILITY

To improve regional access, the City should continue to support efforts to improve existing transit service, plan for BRT service, and explore the potential for circulator service connecting the two centers. To improve connections within the centers, the City should explore the potential to create an interconnected network of local streets, drives, and pedestrian ways. Wayfinding signage should play a role in helping visitors travel to and from local destinations.

In-Between Areas

For areas along US 19 located between designated Regional and Neighborhood Centers, new policies and incentives will be implemented to expand opportunities and promote reinvestment and redevelopment of vacant and underutilized property. As direct access to sites in the In-Between Areas has been limited by US 19 improvements, strip commercial and smaller-scale retail uses have struggled. At the same time, the US 19 roadway project has resulted in better connections to north and south Pinellas communities, thus bringing a larger area of the region into commuting range of sites along the corridor. Over the long term, this change in access is expected to remain a challenge for smaller retail businesses but improve market conditions for office and employment-intensive uses. For offices and other uses that function as regional destinations with lower volumes of customer traffic, direct access to a US 19 interchange is less critical to success than it is for a retail business. While these uses benefit from high levels of visibility, proximity to mixed-use centers, and indirect access to US 19, the high

level of direct access required for strip commercial uses is not required for success.

The anticipated transformation from strip commercial to more employment-intensive uses in the In-Between Areas can be supported in several ways—by expanding the list of permitted uses, facilitating permitting processes, and promoting a more consistent quality and character of development along the roadway.

USE MIX & INTENSITY

Sites in the In-Between Areas are appropriate for a wide range of land uses, with office and other employment-intensive uses favored over smaller-scale retail uses. The City will explore the potential to broaden the range of permitted uses by adding research, technology, laboratory, and other flex/tech use categories to the list of permitted uses and targeted incentives for the incorporation of these more employment intensive uses. To support revitalization and redevelopment, development intensities of up to 1.5 FAR for office/commercial uses and densities of up to 30 dwelling units per acre for residential uses may be permitted.

BUILDING FORMS & CHARACTER

The In-Between Areas are appropriate for a wide range of building types with typical heights between one and four stories. Buildings should be oriented toward US 19, with modest front setbacks to accommodate landscaping and no more than a single bay of parking between buildings and the frontage road. Parking and auto-oriented facilities like drive-through windows should be located in side and rear yard locations to avoid negative impacts on pedestrian streets and public spaces.

CONNECTIVITY & MOBILITY

To improve regional access, the City should continue to support efforts to improve existing transit service and explore the potential for circulator service connecting the In-Between Areas to the Centers and planned

BRT stations. To improve connections along the corridor, the City should require interconnected parking lots and driveways, and, where possible, support creation of new local streets, street extensions, and pedestrian connection to link adjacent uses.

Corridor-wide

Overall, the corridor has the potential to benefit from improved regional access once US 19 improvements are complete. Site, building, and landscape enhancements on individual sites will increase attractiveness and marketability, and strategic public investment in transit service, gateway and streetscape improvements, and local roadway and pedestrian facilities are designed to further enhance the corridor's competitive position in the City and Tampa Bay Region. Further supporting the corridor's transformation are a series of economic development, permitting, and organizational development initiatives presented in the following chapter of the Plan.

2. CONCEPT STUDIES

Several Concept Studies were prepared to illustrate development and redevelopment potential at key locations along the corridor. Studies prepared for five strategically-located areas show how locations with auto-oriented forms of development, fragmented ownership, and disconnected uses can become more attractive, competitive, and mixed-use destinations. The locations chosen for the concept studies include:

- › the Bayview Gardens site and surrounding properties south of Gulf to Bay Boulevard, east of Clearwater Mall;
- › the vacant former shopping center site on the east side of US 19, north of Belleair Road;
- › the mobile home parks and an storage facility at the northeast quadrant of the Sunset Point Road and US 19 intersection; and

- › the general area around the Countryside Mall and Cypress Point Shopping Center properties.

The sketches on the following pages demonstrate the potential for transformation of these areas by illustrating the following benefits of coordinated planning and development:

- › consolidation of ownership and coordinated planning allows for better access, circulation, and the potential for shared parking;
- › access to US 19 and major cross streets can be leveraged by extending existing and constructed new streets and drives;
- › provisions for safe and convenient connections to planned transit stations can be addressed in long-term phasing plans;
- › through coordinated planning, individual projects can contribute to the creation of shared stormwater management systems and area-wide low impact development strategies;
- › higher levels of consistency in setbacks, building frontage conditions, and landscape treatments can reinforce the corridor's regional identity and sense of place; and
- › new public squares and greens can be designed to serve as focal points for destinations.

Like the mixed-use projects highlighted in Appendix B (Case Studies), the design concepts illustrated on the following pages could be realized over time, consistent with long-term development and phasing plans. Projects could be designed with early phases served by surface parking and modest infrastructure investment, and later phases with higher densities and intensities served by structured parking. Such an approach could permit owners and developers to make early investments while still allowing them to take full advantage of improving market conditions and better regional connectivity in future project phases.

Figure 30. Bayview Gardens Concept Study

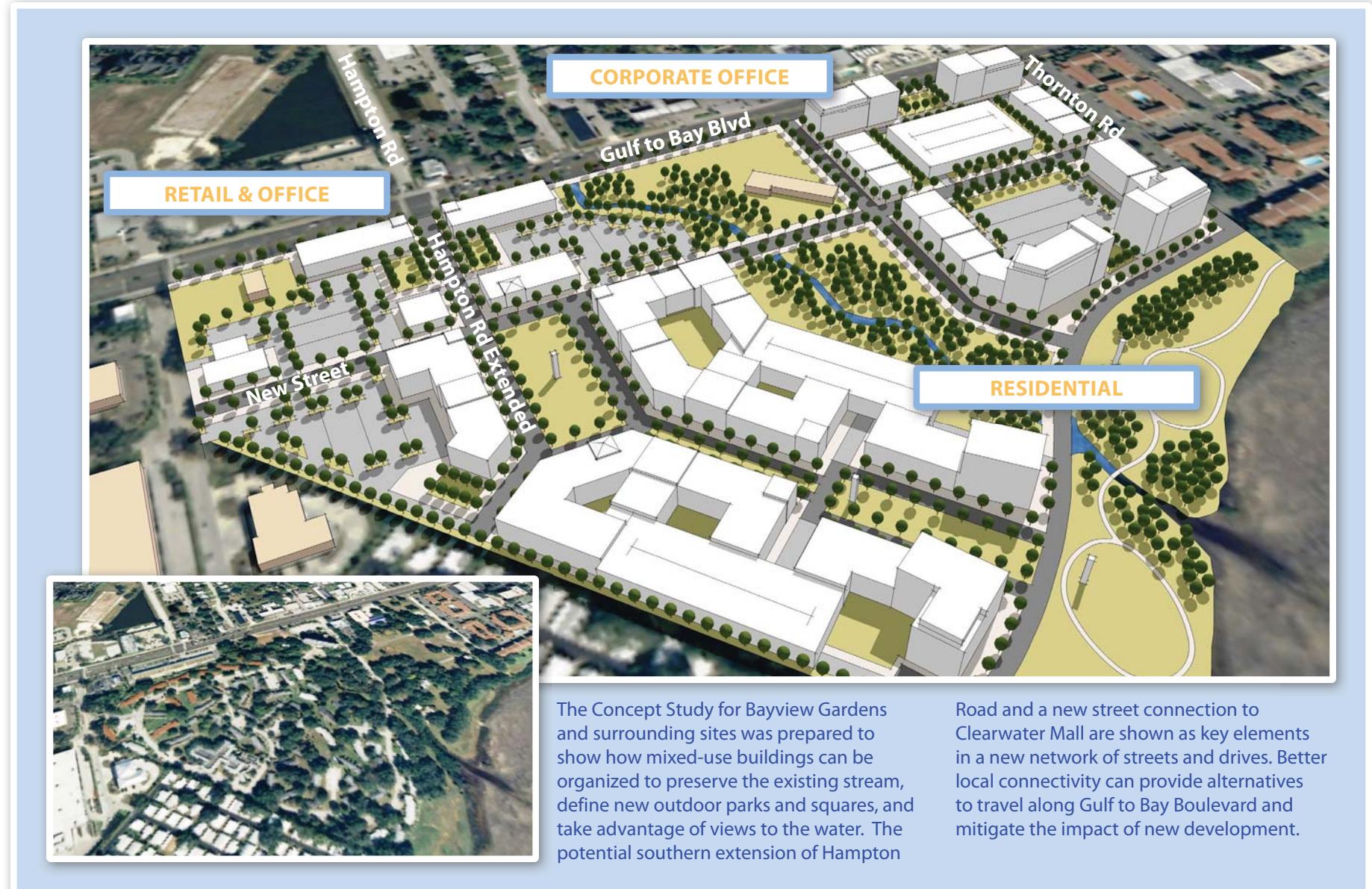


Figure 31. Belleair Concept Study



The Concept Study for the Belleair Road area was prepared to show how the shopping center site could become a new mixed-use destination. The sketch shows new retail and small office uses near the intersection of Belleair Road and US 19, larger-scale office buildings along the US 19 frontage, and

multi-family residential to the east side of the site serving as a transition to existing residential uses. Redevelopment could start with residential, retail, and smaller office buildings, with the larger-scale, corporate office buildings coming on-line in future project phases.

Figure 32. Sunset Point Concept Study



Figure 33. Countryside North Concept Study



The Concept Study for the Countryside Mall site and surrounding properties was prepared to show how office, residential and a wider range of retail offerings could contribute to the area's success as a regionally-competitive destination. By adding structured parking and new buildings on

existing surface parking lots, future phases of development can take full advantage of the area's improved accessibility. In addition, walkability and transit-orientation could be enhanced with new buildings aligned along streets and public spaces.

Figure 34. Countryside South Concept Study



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PLAN STRATEGIES

This section outlines strategies and actions the City should undertake to support the corridor's revitalization and redevelopment, improve access and mobility, and enhance its competitive position in the Tampa Bay Region. Strategies are presented in four major categories—Revitalization & Redevelopment, Competitiveness, Mobility & Connectivity, and Sustainability—and provide a guide for local and regional officials as important decisions are made regarding land use, economic development, and public investment.

1. REVITALIZATION & REDEVELOPMENT

Revitalization and redevelopment strategies for the US 19 corridor are presented under the following broad categories:

- › Plan for Land Use Intensification;
- › Apply a New Zoning Overlay District;
- › Draft New Design Standards; and
- › Encourage Employment-Intensive & Transit-Intensive Uses.

The strategies focus on the long-term retrofit and redevelopment of sites in the corridor's Regional and Neighborhood Centers and the ongoing transformation and improvement of the In-Between Areas. Strategies are designed to position Regional and Neighborhood Centers as favored locations for reinvestment and support their long-term development as more attractive, vital destinations. For the In-Between Areas, strategies are designed to enhance the competitiveness of existing sites and buildings, and encourage redevelopment to incorporate a wider range of employment-intensive uses.

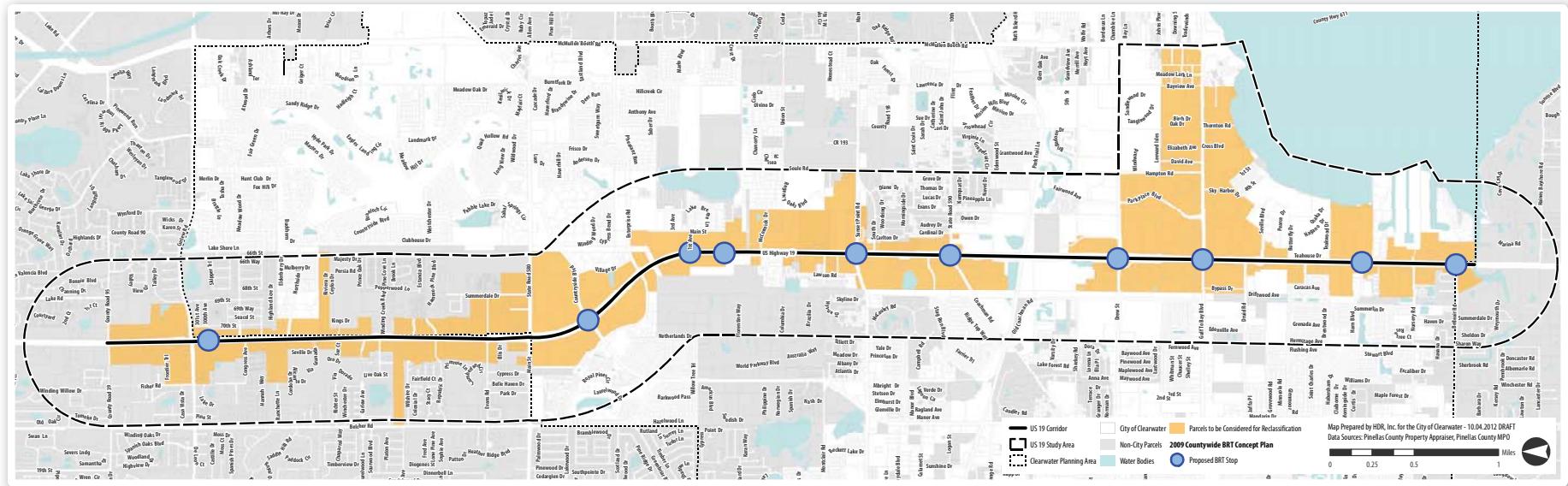
Recommendations in this section set the stage for the City to allow higher development intensities and densities and call for continued collaboration among local and regional planning entities to ensure land use and transportation plans support the corridor's long-term potential for transformation. Recommendations also identify actions the City can take to promote sustainable, pedestrian-friendly forms and patterns of development.

Recommendations also describe ways the City should promote projects with mixed land uses, interconnected networks of streets, quality streetscapes and pedestrian connections, shared parking, and accessible public spaces. For larger sites, the City should support plans and designs that encourage consolidation and long-term phasing, thus allowing for land use intensification and connectivity improvements over time as market conditions improve.

Strategy 1.1 - Plan for Land Use Intensification

To achieve goals for reinvestment and redevelopment, allowable densities and intensities for sites along the corridor must be increased beyond what is currently allowed by the *Countywide Plan Rules*, as governed by the PPC. As described in the previous chapter, sites in Regional Centers require a maximum 2.5 FAR and 50 dwelling units per acre, sites in Neighborhood Centers require a maximum 1.5 FAR and 50 dwelling units per acre, and sites in In-Between Areas require a maximum 1.5 FAR and 30 dwelling units per acre. To allow these densities and intensities of development, the City may pursue one of two options outlined below.

Figure 35. Area Targeted for Land Use Reclassification



OPTION 1: INCORPORATE NEW DENSITIES/INTENSITIES INTO COUNTYWIDE PLAN RULES & COUNTYWIDE FUTURE LAND USE PLAN MAP

The preferred approach to achieving goals for reinvestment and redevelopment involves working with the PPC as it develops the *Countywide Plan Rules* and *Countywide Future Land Use Plan Map* to allow for greater densities, intensities, and uses by applying new future land use classifications to the area identified in Figure 35.

The PPC is currently creating new *Countywide Plan Rules* to create a more future-oriented Countywide Plan Map defining areas of growth and areas of stability. Areas of growth are places where increased density and intensity will be encouraged, and areas of stability are places where growth would be limited because it is neither desired nor supported by the necessary infrastructure and transit. The new rules and map will set allowable densities, intensities, and uses with which the City's development regulations would need to be consistent.

The City is involved as a stakeholder in the process of developing the new *Countywide Plan Rules* and will continue to advocate for the creation of new rules and plan classifications consistent with recommendations in this plan. The City will work with the PPC to ensure desired densities and intensities are allowed either as of right or through a more simplified planning process than is required to apply transit-oriented development (TOD) land use classifications.

Should this not remain a viable option, the City will pursue Option 2 as outlined below.

OPTION 2: AMEND COMPREHENSIVE PLAN TO APPLY TOD CLASSIFICATIONS

The second approach would involve amending the *Comprehensive Plan* to apply the greater intensities and densities of development allowed for areas designated as TODs. To use this option, the City would first have to work with the PPC to change rules to allow municipalities to

apply TOD provisions along “Secondary Transit Corridors” in advance of adoption by the MPO of a Locally Preferred Alternative for future transit service in the MPO LRTP and completion of applicable environmental impact studies. Once the PPC rules are amended, the City would need to amend the *Comprehensive Plan* to define US 19 as a “Secondary Transit Corridor,” change references to transit service to include BRT service, and add language allowing application of the TOD future land use plan classification provided under the *Countywide Plan Rules*. (The term “Secondary Transit Corridor” in the *Countywide Plan Rules* refers to transit corridors like US 19 which have been identified in PSTA’s *Enhanced Bus Network Plan*.)

Once the initial *Comprehensive Plan* changes are complete, the City would need to take steps to apply the TOD future land use plan classification. Initially, the City could apply the TOD plan classification as a planning overlay and take advantage of basic mixed-use provisions provided for in the *Countywide Plan Rules*—according to the rules, the planning overlay doesn’t change existing future land use categories, but allows the City to permit the maximum number of units per acre and maximum nonresidential FAR of the underlying category on the same land area. Next, the City would need to complete a corridor-wide station area plan that 1) shows how transit station area future land use subclassifications will be applied along the corridor; 2) identifies policies and development standards consistent with recommendations in TBARTA’s *Transit-Oriented Development Guiding Principles* and the PPC’s *Countywide Plan Position Statements and Strategies* (see Figure 36); and 3) is consistent with TOD provisions in the *Comprehensive Plan*. Through the application of the TOD subclassifications, the City may allow increases in development intensities, as long as projects are designed consistent with standards that address the mix and intensity of land uses, the form and pattern of development, and the design character of building, streets, streetscapes, and public spaces.

The City anticipates designating Regional and Neighborhood Centers along the corridor as Transit Station Areas Type II: Suburban Centers

Figure 36. Excerpts from *Countywide Plan Position Statements & Strategies*

COUNTYWIDE PLAN POSITION STATEMENTS RELATED TO TOD

Position Statement 4.2: Transit Station Area Planning. Concentrate a mix of complementary, well-integrated land uses within walking distance ($\frac{1}{2}$ mile) of transit stations, and in an area of influence up to one mile around the stations.

Position Statement 4.3: Densities and Intensities to Support Transit. Encourage higher densities for new development in transit station areas, concentrating the highest densities closest to the transit station, and transitioning to lower densities at the edges of the station area, especially when adjacent to existing lower-density development such as single-family neighborhoods.

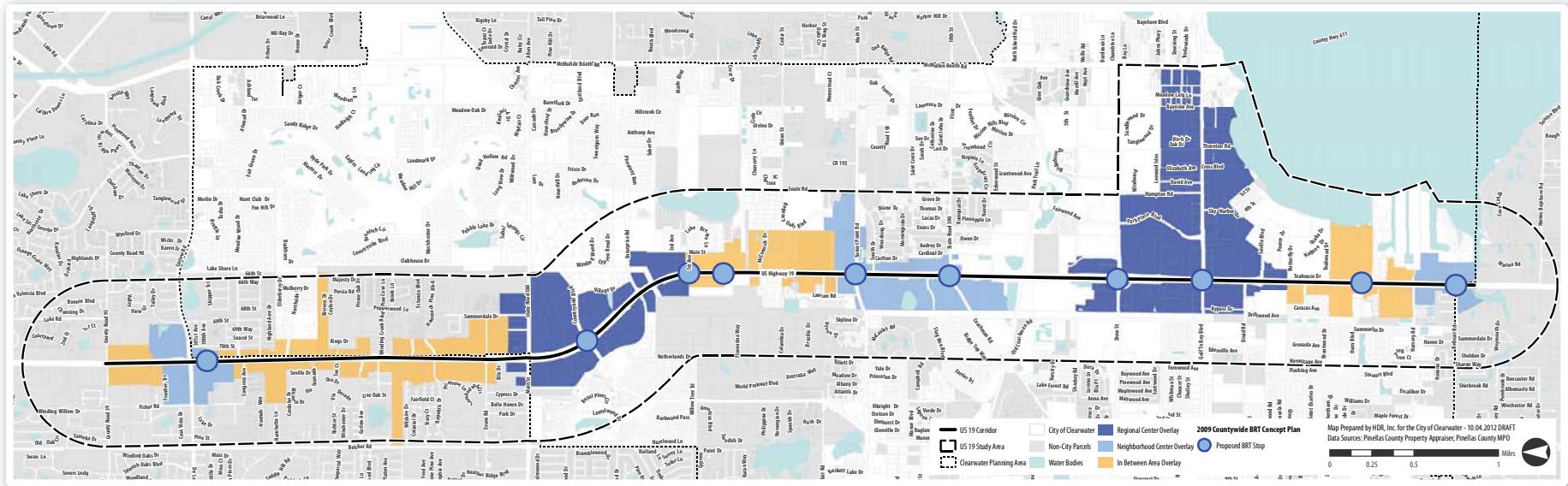
Position Statement 4.4: Building and Site Design in Transit Station Areas. Use urban design to enhance the community identity of transit station areas and to make them attractive, safe and convenient places.

Position Statement 4.5: Streetscapes in Transit Station Areas. Require that streetscapes in transit station areas be designed to encourage pedestrian activity.

Position Statement 4.6: Open Space in Transit Areas. Require the creation of open spaces around transit stations, to act as development catalysts and serve as gathering spaces and focal points for the public.

and the In-Between Areas as Transit Station Area Type III: Neighborhood Centers. Such designations would allow the highest intensity, mixed-use development to occur at major crossroad locations that would be served by BRT stops. Less intense development would be located in areas along the corridor at a slightly greater distance from potential BRT stop locations.

Figure 37. Potential Limits of Overlay District with Subareas Identified



Although the *Countywide Plan Rules* permit communities to apply development intensities of up to 5.0 FAR for Type II areas and up to 3.0 FAR for Type III areas, this plan recommends intensities be capped at 2.5 FAR in Type II areas and 1.5 FAR in Type III areas. These intensities are more consistent with the intensities of development in existing suburban and neighborhood centers in the region and may be more appropriate for the scale of development anticipated along US 19.

Strategy 1.2 - Apply a New Zoning Overlay District

To advance the community's place-making, economic development, mobility, and sustainability goals for the corridor, the City should develop new zoning tools to ensure individual projects contribute to the creation of more attractive and competitive local and regional destinations. The City should prepare and apply a zoning overlay district that is consistent with the increases in density and intensity

outlined in Strategy 1.1 and with those recommended in the Framework Plan chapter, while requiring projects to meet specific standards for development in each of the corridor's three types of development areas—Regional Centers, Neighborhood Centers, and In-Between Areas.

The overlay district for the corridor, the preliminary boundaries of which are shown on Figure 37, would be designed to supplement standards under the existing zoning districts and introduce corridor-specific standards to accomplish the following:

- › reinforce and improve regional and neighborhood shopping and employment destinations;
 - › attract employment-intensive and transit-supportive land uses;
 - › create an interconnected network of streets and drives designed to disperse traffic, reduce vehicle miles traveled, provide for cross-parcel vehicular and pedestrian connections and convenient routes for pedestrians and bicyclists;

- › promote building and site designs that contribute to the creation of attractive streetscapes, screen parking and service areas, and incorporate low impact development (LID) and other sustainable development strategies; and
- › encourage consolidation of ownership and coordinated planning; and
- › promote master planning of larger sites and with multiple buildings and the potential for future phases of development and improvement.

Such an overlay district could also be designed to provide incentives for certain types of projects. For example, the overlay could be designed to allow projects to achieve the highest densities and intensities if certain public benefits were included in the project. Maximum densities and intensities could be achieved for projects with the following features or qualities:

- › inclusion of affordable housing;
- › dedication of rights-of-way for local street extensions;
- › completion of street, streetscape, or transit improvements;
- › inclusion of employment-intensive or transit-supportive land uses;
- › provision of open space in the form of public parks, plazas, or squares;
- › incorporation of innovative sustainable building and site designs;
- › master planning to indicate how intensification may be achieved in future project phases; and
- › other features or qualities defined as providing important benefits to the community.

Strategy 1.3 - Draft New Design Standards

The City should establish new guidelines and standards to ensure individual projects along the corridor contribute to the creation of more

compact, accessible, and attractive pedestrian- and transit-friendly destinations. A review of topics to be addressed in the new guidelines and standards follows.

PROJECT TYPES

Guidelines should be designed to address two general types of projects—Infill Projects and Planned Projects—and offer guidance regarding the preferred form and pattern of development.

- › **Infill Projects.** Projects on sites up to five acres along the US 19 frontage roads or fronting an existing collector or arterial should be designed to contribute to the corridor's long-term transformation into a more attractive and pedestrian-friendly destination. Buildings should be oriented toward public rights-of-way with minimal setbacks, cross-parcel pedestrian ways and vehicular circulation easements should be provided, and parking should be located in rear and side yard locations. Where appropriate, connections to planned transit stops should be provided and auto-oriented facilities like loading docks, service yards, and drive-through windows and bays should be located to the rear of buildings.
- › **Planned Projects.** Projects calling for new development or the redevelopment and reuse of strip centers, shopping centers, and other properties greater than five acres should be required to create a more urban pattern of development with buildings oriented to existing and new streets, parking in mid-block and rear yard locations, accommodations for cross-parcel circulation, pedestrian connections to surrounding sites, and accommodations for transit. For projects with the potential for multiple buildings and phased development, the City should require the submittal of plans indicating how improvements, including connectivity enhancements, will be phased over time.

Figure 38. Mall Redevelopment with Street Network & Walkable Streetscapes



STREET & BLOCK PATTERNS

For projects on sites greater than ten acres within designated Regional and Neighborhood Centers, standards should require that buildings be arranged on development blocks served by accessible, attractive, pedestrian-friendly streets and internal drives designed to serve diverse access and mobility needs, provide numerous direct and indirect routes linking destinations, and improve connections with surrounding neighborhoods where feasible. For projects in In-Between Areas, standards should focus on creating effective cross-parcel circulation routes and the realization of street and drive extensions where feasible.

The following guidelines and standards should be followed for projects in Regional and Neighborhood Centers to encourage the division of large sites into development blocks served by networks of walkable streets and drives.

- › **Block Structure.** Larger sites should be divided into development blocks scaled to accommodate a mix of land uses, building types, and off-street parking and service areas. Development plans should define the limits of individual development blocks and, where necessary, show how proposed blocks may be divided into building lots. Typical perimeter block dimensions should average 1,600 linear feet with maximum allowances of 2,000 linear feet as measured along the perimeter property line of a proposed development block. Perimeter block dimensions up to 3,000 linear feet may be permitted for blocks that contain mid-block parking structures or attached public spaces. Blocks need not be regular in form as long as guidelines for the creation of an interconnected network of streets and drives are met.
- › **Street Networks.** Projects should be designed to provide a fine-grained network of publicly accessible, pedestrian-friendly streets designed to support local vehicle traffic, cyclists, transit service, and connections to surrounding neighborhoods and destinations.

- › **Street & Drive Extensions.** The extension of existing public streets and private access drives should be encouraged to distribute traffic and improve access. Street stubs and rights-of-way should be provided to allow for connections to future development or redevelopment on adjacent sites. The provision of a pedestrian passage within a provided public right-of-way may be permitted where the extension of an existing street is not possible.
- › **Street & Streetscape Design.** Existing and new streets and drives should be designed to serve as both local movement corridors and important extensions of the community's public realm. Streets and drives within and adjacent to Centers should be designed to provide for the safe, convenient, and comfortable movement of pedestrians. Existing and new streets and drives should provide quality environments for walking, convenient connections to neighborhoods, and comfortable and safe connections between proximate destinations. While the design of individual streets and drives may vary considerably depending on their place within the larger street network, their intended character as active, attractive, and accessible public spaces should not be compromised.

MIX & DISTRIBUTION OF USES

New guidelines and standards should also require that new development and redevelopment along the corridor include a mix and intensity/density of land uses which help achieve the following goals:

- › concentrate office and other employment-intensive uses in places with easy access to US 19;
- › provide for retail, entertainment, and other uses that serve the needs of surrounding neighborhoods;
- › promote high-intensity uses in close proximity to planned transit stops to support more intensive use of transit;
- › lessen demands on local and regional street network by maximizing opportunities for the localization of work, shopping, and leisure trips;

Figure 39. Buildings Defining Streets & Public Spaces



Figure 40. Pedestrian-Friendly Frontages



- › support shared parking and “park once” trips;
- › promote active lifestyles by encouraging walking and biking as convenient alternatives to automobile travel; and
- › contribute to street-level pedestrian activity and the informal surveillance of public spaces.

Guidelines and standards should encourage higher-intensity uses to locate near planned transit stops and away from existing lower-density residential neighborhoods, and ensure that parking for higher-intensity uses is easily accessed from the regional road network. Mixed-use

projects that provide for a range of housing options with convenient access to services and amenities should be encouraged.

Centers should include a balanced mix of uses that supports the creation of active, pedestrian-friendly streets and public spaces. Retail and other active uses should be located to maximize walkability along streets planned for the highest levels of pedestrian use, and in these areas, auto-oriented uses should be discouraged.

BUILDING FORM & CHARACTER

New guidelines and standards should promote development with quality urban buildings designed to use resources efficiently and contribute to the creation of safe, comfortable, and attractive destinations. With careful design, uses that traditionally occupy strip commercial shopping centers can be fully integrated into more compact, pedestrian-friendly settings.

The following text describes preferences for the placement, form, and design of new buildings along the corridor.

- › **Building Placement.** To define streets, drives, and sidewalks and minimize the visual impact of large expanses of parking, buildings should be oriented toward public streets and spaces with minimal to no setback in Regional and Neighborhood Centers and slightly greater setbacks in the In-Between Areas. In Neighborhood and Regional Centers, buildings façades should be aligned along property lines with primary entries opening directly onto public sidewalks and public spaces. In the In-Between Areas, buildings may be setback behind a landscape area and a single bay of parking but greater setbacks are discouraged. Setbacks should remain generally consistent along street and drive frontages with modest variations allowed for visual interest.
- › **Building Form.** Buildings along the corridor may range in height from one to eight stories with two- to four-story buildings typical.

Taller buildings may be permitted in locations where sufficient transitions in height may be achieved between taller development and surrounding residential neighborhoods. Generally, buildings above four stories should be located along the US 19 frontage and in the center of projects in the Regional Centers. Building designs should acknowledge the scale and proximity of adjacent residential neighborhoods through height reductions and tapering, increased stepbacks above street-level façades, and other means to ensure effective transitions.

- › **Pedestrian-Friendly Frontages.** In Neighborhood and Regional Centers, the street level façades of buildings located along streets designed for high levels of pedestrian use should be designed as storefronts with generous display windows, high levels of transparency, and multiple entries to individual tenant spaces. Upper-story multi-family units and office space should be accessed

from common lobbies opening directly onto sidewalks. Expanses of blank walls along such frontages should be prohibited.

- › **Large-Scale Retail.** The presence of large-scale retail uses, such as big box retailers and grocery stores, may be essential to the vitality of a project, but their large footprints, blank rear and side walls, and expansive service and loading areas can create visual and functional challenges. Poor integration also can compromise a destination's economic performance and "fit" within the surrounding community. Large-scale retail uses should be fully integrated into a project's pattern of streets and blocks, with primary entries opening onto sidewalks, active "liner" buildings along important pedestrian streets, and service and loading areas in mid-block locations. Blank walls and loading docks should be located away from streets and drives with active retail frontages and public spaces.

Figure 41. Large-Scale Retail with Liner Buildings

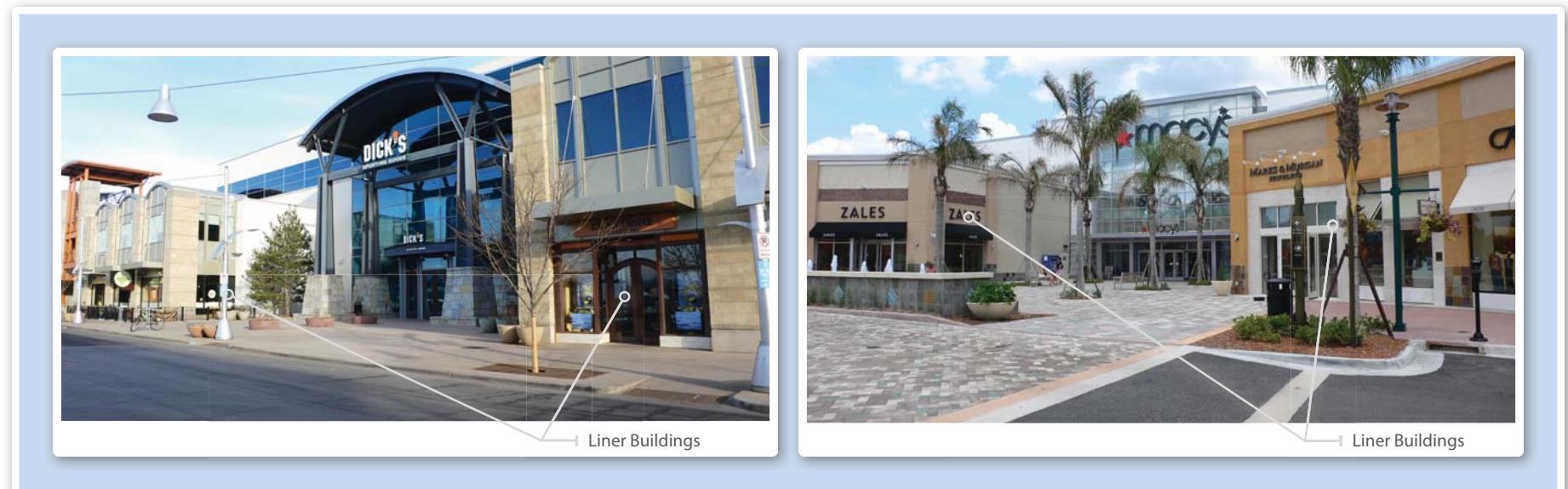
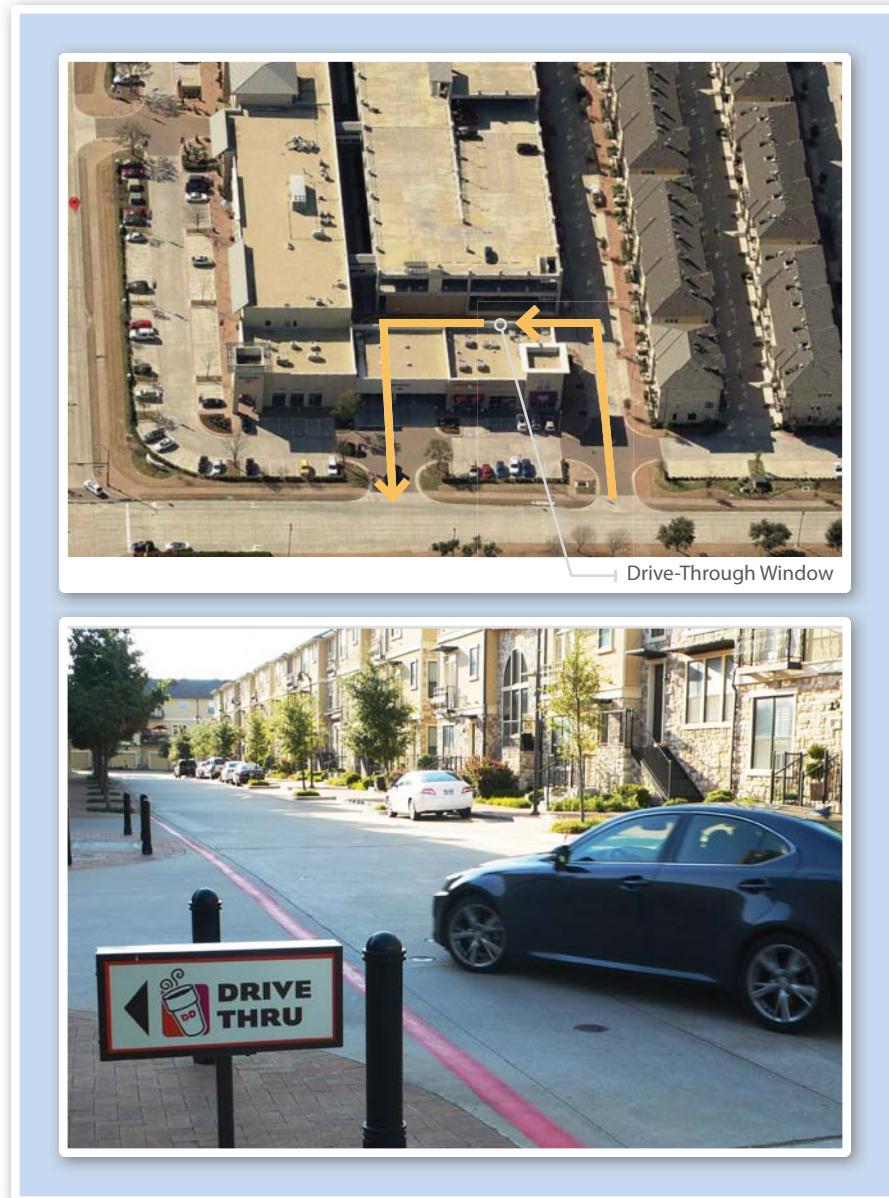


Figure 42. Drive-Through Facilities Integrated into a Town Center Project



- › **Parking & Service Locations.** Off-street parking lots and structures, loading docks, service areas, drive-through windows, and dumpsters should be located behind buildings in mid-block locations and screened from public view. Drives to access mid-block parking and service areas may occur only where access from an avenue, side street, or alley is not feasible.
- › **Drive-Through Facilities.** Although Regional and Neighborhood Centers are generally not appropriate locations for drive-through facilities serving restaurants, banks, pharmacies, and other retail uses, new standards may allow these facilities so long as they are sited behind front building façades, are not accessed from pedestrian streets, and pedestrian circulation is not impeded by drive-through traffic.

PUBLIC SPACES

Well-designed outdoor public spaces play pivotal roles in shaping a place's attractiveness, livability, and economic vitality. When designed to support a variety of activities, public squares, plazas, and greens provide important places for informal gathering, relaxation, and play. They can also serve as sites for artistic and cultural expression and settings for community events and activities.

New guidelines and standards should provide that public spaces within Regional and Neighborhood Centers be easily accessible; visible from adjacent streets, sidewalks, and buildings; and specifically designated for public use. As a general rule of thumb, a minimum of 10 percent of the land area of each Regional and Neighborhood Center should be dedicated as public space and be designed as either a central gathering space or a series of smaller scale squares and greens. Such spaces should generally be between 20,000 and 60,000 square feet and located at the intersection of important pedestrian streets, and their design should include hardscape areas with seating, shade structures, public art, water features, and other amenities designed to support active use and facilitate special events and activities. Smaller spaces, between 5,000

and 40,000 square feet, should be designed with a mix of hardscape and landscape areas with seating, shade structures, play equipment, and amenities designed to support passive uses and small-scale active uses.

To ensure access, comfort, and adaptability, all proposed public spaces should be designed as extensions of the public streetscape environment and include adequate seating, shade, landscaping, and open spaces for informal gathering and planned events. Clear lines of site should be provided to allow for the formal and informal surveillance of the space. The grade of hardscape areas, lawn panels, and planting beds within public spaces should generally match adjacent sidewalks.

PARKING

Within Regional and Neighborhood Centers, the need for automobile parking should be balanced with the objectives for the creation of active urban environments. New guidelines and standards should promote creative parking solutions, including a mix of on-street parking and off-street parking, the use of shared parking, provisions for generous landscaping, and LID design features for managing stormwater runoff.

New guidelines and standards for projects along the corridor should call for parking areas designed to allow easy access, pleasant and safe pedestrian movement, and convenient connections to on-site and adjacent destinations. Where possible, off-street parking areas, either surface parking or structured parking, should be located to the rear of buildings and designed to reduce the number of curb cuts on US 19 frontage roads and local streets. Cross-lot easements or shared parking lots should be encouraged on multi-parcel projects, with shared parking, shared driveways, and cross access between adjacent parcels to minimize driveways on the street. Where structured parking is provided, the parking structure, whether freestanding, attached, or integrated into a building, should relate architecturally to the surrounding buildings and contribute positively to the overall character of the project.

Figure 43. Public Squares & Greens



Strategy 1.4 - Encourage Employment-Intensive and Transit-Supportive Land Uses

The City should explore opportunities to promote a broader range of employment-intensive and transit-supportive uses along the corridor. The City should continue working to ensure existing and new future land use classifications and zoning districts allow research and development, laboratory, and light manufacturing uses, as well as uses like office and educational facilities that may generate higher demand for transit trips. These policy and regulatory provisions could be designed to accelerate the transition from retail to other uses in the In-Between Areas of the corridor as well as provide for a wider range of uses to support the redevelopment and adaptive reuse of older commercial properties.

The City should also identify a preferred list of employment-intensive land uses that may be approved administratively as long as specific minimum design and development criteria (i.e., landscaping, setbacks, buffering, and parking) are met. Such uses should include office, lodging, and other uses identified as having a positive fiscal impact and helping improve the City's job-housing balance.

2. COMPETITIVENESS

Public expenditures on infrastructure and economic development programs, the implementation of development regulations and review processes, and the levy of fees and taxes all have a powerful effect on the pace and pattern of private investment. To maximize its potential to spark reinvestment and redevelopment along US 19, the City should realign actions and programs affecting the corridor's competitive position. Organized around the following broad categories, these strategies are designed to help accelerate the pace of improvement along the corridor as US 19 improvements continue and national and regional economic conditions improve.

The competitiveness strategies for the US 19 corridor are organized around the following broad categories:

- › Expand Development Incentives;
- › Facilitate Review Processes;
- › Create a Corridor Improvement Organization;
- › Install Wayfinding Signs;
- › Strengthen Brand Identity; and
- › Enhance Gateways, Landscapes & Streetscapes.

Strategy 2.1 - Expand Development Incentives

The City should expand the current list of direct and indirect assistance available to projects that advance local economic development goals and improve the corridor's competitive position in the Tampa Bay Region. Specifically, the City should explore the potential to reduce permit fees, provide local economic development tax exemptions using the authority approved by voters in November 2012, and offer other direct or indirect financial incentives for projects along US 19 that advance economic development objectives in the *Economic Development Strategic Plan* (2011).

The City should also work with local stakeholders to identify strategies and funding sources to support individual property owner efforts to fix-up and clean-up existing sites and buildings, or, where reinvestment may be infeasible, remove older buildings. Such a program could be modeled after the existing programs in Downtown Clearwater. Through the downtown Façade Improvement Program, the City of Clearwater Community Redevelopment Agency (CRA) seeks to help improve the attractiveness of buildings and the overall attractiveness of Downtown by providing financial assistance for façade design services and the completion of improvement projects. Under the program, owners can access up to \$3,000 of design assistance from local architects and up to \$10,000 of grant and \$25,000 of loan funds.

Resources to support programs could be generated through a corridor-specific assessment district or redevelopment district as discussed in following sections of the plan.

Strategy 2.2 - Facilitate Review Processes

The City should identify ways to simplify and streamline development review processes. The City should develop a preferred list of land uses and project types that may be eligible to follow an administrative approval process whereby approvals could be granted by the City's Development Review Committee (DRC). Eligible projects may include those involving consolidation of ownership, provision of public streets or spaces, or other features advancing the City's long-term objectives for the corridor and the local economy. The City should also assign a dedicated team of planners to work with applicants through development review and building permit review processes. Such a team could assist in educating prospective applicants about corridor-specific processes and standards and ensure effective communications throughout the review process.

Strategy 2.3 - Create a Corridor Improvement Organization

In partnership with the Clearwater Regional Chamber, Pinellas County Economic Development, and major land holders along the corridor, the City should engage corridor stakeholders in an effort to explore alternatives for the creation of a corridor improvement association or organization. Such an organization could serve several important and interrelated functions, including:

- › providing a consistent voice for the concerns of corridor property owners and stakeholders;
- › advocating for regulatory or policy changes to promote investment and redevelopment;

- › planning and raising revenue for marketing campaigns, wayfinding programs, or gateway or landscape projects; and
- › serving as a liaison between local property owners, surrounding neighborhoods, and public entities like the City, County, and FDOT.

To start the process, a summit could be organized to bring together property owners and other stakeholders to evaluate organizational models and revenue generation options. During this initial dialogue, the following models for a new organization should be evaluated.

BUSINESS IMPROVEMENT DISTRICT

A Business Improvement District (BID) offers a potential organizational model for application along the US 19 corridor. BIDs are organizations formed to provide enhanced services and complete improvements within a defined area using funding generated through a self-assessed, non ad-valorem tax on property. Under the Special District provisions of Florida law (Chapter 189) and subject to legislative approval, a BID in a Florida community may be organized to provide all or a combination of the following services, generally considered to be above and beyond what the local government can reasonably provide:

- › clean and safe programs;
- › planning and programming for special events;
- › marketing, communications, and partnership services;
- › business retention and attraction support; and
- › landscape, gateway, and public space improvements.

BIDs are typically organized as not-for-profit, 501(c)6 or non-profit, 501(c)3 entities governed by a board of directors comprised of representative property owners.

The Special Services District established to fund projects in Downtown Tampa serves as a good local example of a BID designed to support reinvestment and revitalization in a geographically-defined district.

Figure 44. Example Communications from a Membership-Based Partnership

The screenshot shows the homepage of the Clearwater Downtown Partnership. At the top, there is a navigation bar with links for VISION, BUSINESSES, PLAY, EVENTS, NEWS, MULTIMEDIA, and CONTACT. To the right of the navigation bar are two buttons: 'JOIN THE CDP (\$50 off)' and 'Subscribe to our newsletter'. Below the navigation bar is a large banner image of a waterfront cityscape. Overlaid on the banner is a text box containing the following text:

The Clearwater Downtown Partnership is an independent voice of business and property owners in Downtown Clearwater. It brings stakeholders together to develop, advocate and implement policies that build an exciting, vibrant and diverse downtown.
It plays an essential role in keeping the business community educated, informed and involved in the continued success of the downtown.

Below the banner, there is a section titled 'Comprised of downtown property owners, developers, concerned citizens and civic groups, the Downtown Partnership is a not for profit organization whose goal is to promote and foster the economic redevelopment of our downtown.' followed by a 'Learn More' link. On the left side of the page, there is a sidebar with three sections: 'Vision – The Power of Seeing', 'What do you think of when you think of a vibrant and economically thriving downtown?', and 'History', 'Executive', and 'Advisory' sections. The 'History' section is highlighted with an orange background.

MEMBERSHIP-BASED PARTNERSHIP

The City and corridor stakeholders could alternatively consider forming a membership-based organization like the Clearwater Downtown Partnership. A membership organization operating as a not-for-profit could raise funds from members and seek additional grant funding to support a modest set of initiatives, most likely focusing on advocacy, public education, and marketing. Such an organization could act as an arm of an existing organization like the Clearwater Regional Chamber, as an extension of an organization like a BID as occurs with the Tampa Downtown Partnership, or as an independent entity. Although resources would be limited if solely supported by membership dues and grants, the organization could serve as an important education and advocacy platform for corridor stakeholders.

COMMUNITY REDEVELOPMENT AREA

Establishment of a Community Redevelopment Area (CRA) is another option that should be evaluated by the City and corridor stakeholders. Under Florida law (Chapter 163, Part III), local governments may designate CRAs within which a portion of tax revenues generated in the district may be reinvested in streetscapes and roadway improvements; sewer, water or stormwater improvements; building renovations; and parking improvements, or on assistance programs like a site or façade improvement program. CRAs have been established by a number of Florida cities to support the revitalization of popular destinations like Downtown Clearwater, Church Street in Orlando, and Ybor City in Tampa. Although typically used as a tool to revitalize downtown and main street districts, CRAs have been established to help attract private investment in older suburban commercial corridors and industrial districts, including the Drew Park district east of Tampa International Airport.

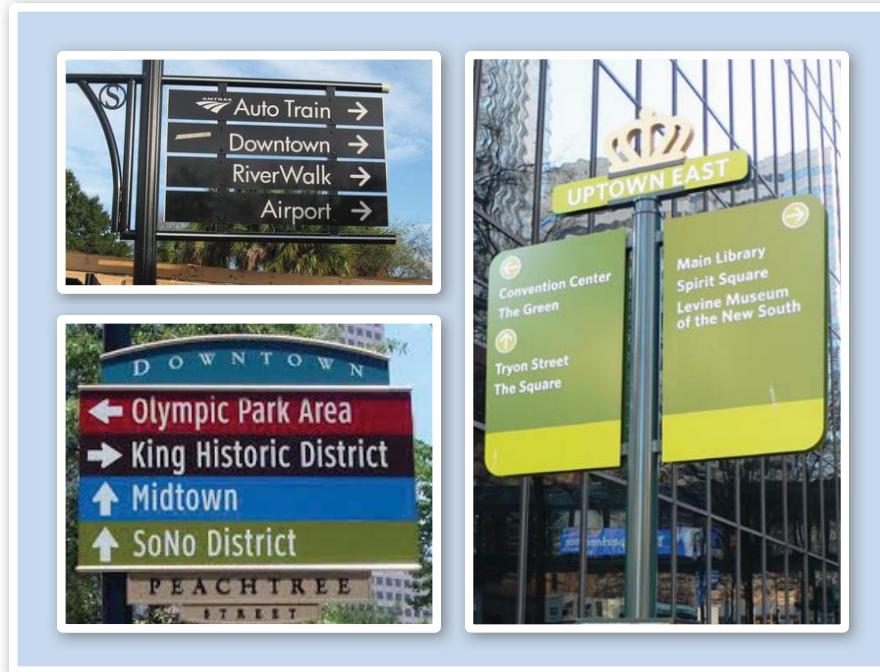
Strategy 2.4 - Install Wayfinding Signs

To guide locals and visitors to destinations along the corridor, the City, working with a BID or other stakeholder advocacy group, should prepare and implement a plan for a wayfinding program. Through a system of navigation signs and maps, the system could help guide people from US 19 to local streets, improve inter-district and district-to-district connections, and reinforce a consistent identify for the corridor.

A comprehensive system—designed to be phased and possibly scalable to the entire City—should address commercial district identity and wayfinding signage first, gateway signage and landscaping second, and additional trailblazing signs, wayfinding kiosks (perhaps installed at high pedestrian traffic locations), and other elements as later phases.

The City should consider using the Countryside area as the location for a pilot project. With the closing of the Enterprise Drive intersection with

Figure 45. Examples of Wayfinding Signage



US 19, drivers with destinations along Enterprise Drive face significant difficulties. To address these challenges, a simple wayfinding signage system could include directional signage at the following locations:

- › on US 19 north of SR 580 directing southbound drivers to use the SR 580 exit to access destinations on Enterprise Drive;
- › at the intersections of the US 19 frontage road and Countryside Boulevard directing travelers to the west to Enterprise Drive or to the east to Enterprise Drive via Village Drive; and
- › at the intersection of Countryside Boulevard and Village Drive directing travelers south on Village Drive to Enterprise Drive.

Figure 46. Examples of Gateway Treatments



Strategy 2.5 - Strengthen Brand Identity

To identify destinations along the corridor, a simple place-naming system should be established and reinforced through wayfinding and marketing programs. District names should be distinctive, easy to remember, unique to the area, and build on place names already in common use. As a starting point, the following place names should be considered: Countryside, Sunset Point, Belleair, and Gulf to Bay.

Strategy 2.6 - Enhance Gateways & Streetscapes

The City should undertake a series of gateway improvements and landscape/streetscape enhancement projects to improve the corridor's identity and enhance the experience of traveling from place to place. The City should prepare plans for gateway improvements at Gulf to Bay Boulevard and McMullen Booth Road, Belleair Road and US 19, and SR 580 and US 19. Gateway improvements at each major entry could include welcome signage, decorative lighting, and special landscape improvements. The City should also identify street segments where landscape and streetscape improvements would have the greatest potential to improve the corridor's image. A BID, CRA, membership-based partnership, or other stakeholder organization could play a strong role in planning, prioritizing, funding, and possibly completing gateway, landscape, streetscape, and other projects designed to improve the corridor's attractiveness and competitive position.

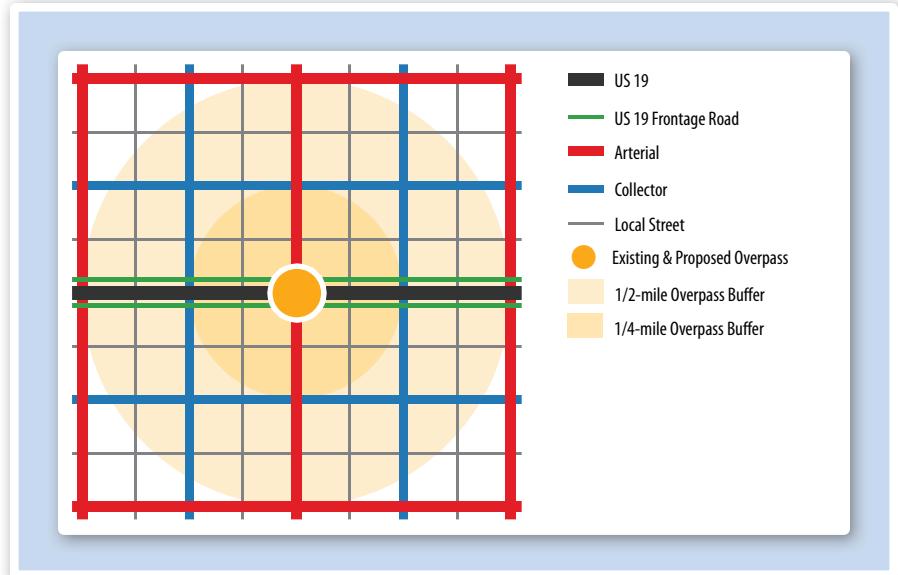
3. MOBILITY & CONNECTIVITY

Improving mobility and accessibility along the US 19 corridor is critical to achieving the City's long-term goals for redevelopment and revitalization. Making it easier to travel from place to place, enhancing transit service, and providing better facilities and amenities for pedestrians and bicyclists are all important to making places along the corridor more livable and competitive.

The mobility and connectivity strategies for the US 19 corridor are organized around the following broad categories:

- › Create Interconnected Street Networks;
- › Improve Conditions for Pedestrians & Cyclists;
- › Advocate for Enhanced Transit Service; and
- › Plan for Circulator Service.

Figure 47. Ideal Street Network

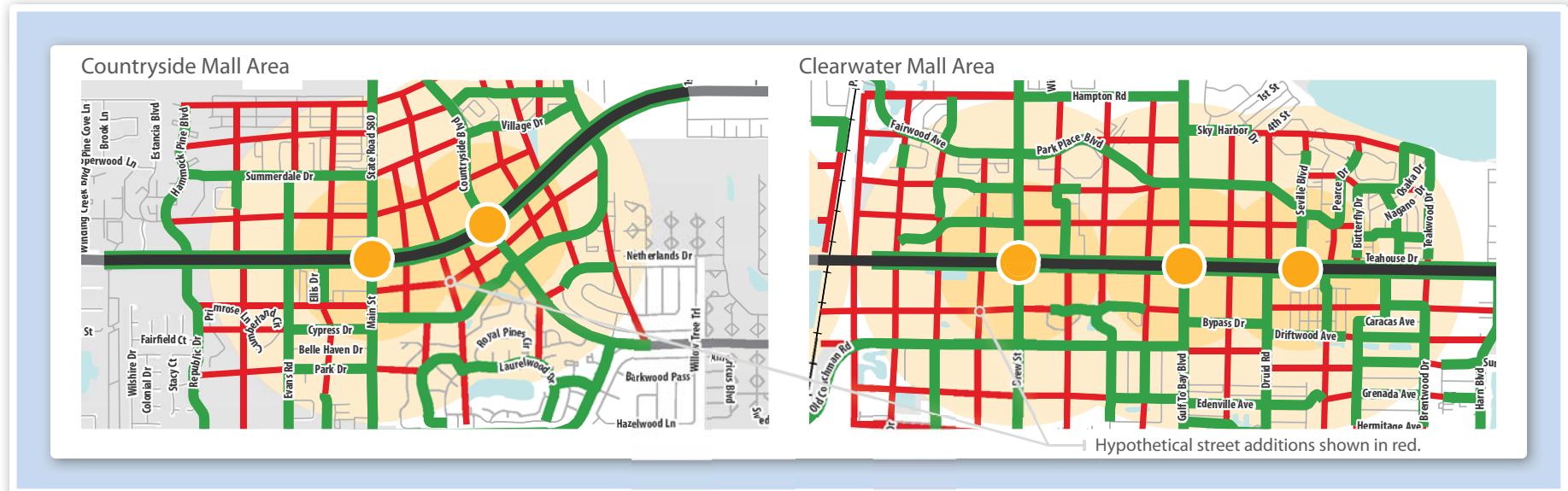


Strategy 3.1 - Create Interconnected Street Networks

Interconnected networks of local streets can serve as the foundation for the creation of successful mixed-use, transit-supportive districts. Ideally, continuous arterial roadways should be spaced at no more than one-half mile intervals to ensure efficient traffic flow, multiple and direct routes to destinations, and ease of use for all modes, including transit, pedestrians, and bicyclists. Collector roadways can be spaced at one-quarter or even one-eighth mile intervals to ensure appropriate network connectivity and appropriate access to destinations. This ideal level of roadway spacing is at least two times as dense as the existing network within the study area.

Effective grid roadway networks with more frequent spacing of collector and arterial roadways as described above provide shorter trip lengths, more route choices, and disperse traffic onto many roadways rather

Figure 48. Ideal Street Network Concepts Applied to Areas along US 19



than concentrating them on just a few roadways. The closer spacing of roadways allows them to be more compact with fewer lanes and lower traffic volumes, and therefore friendlier to pedestrians and bicyclists, compared to a few, wide, high speed roadways with heavy traffic volumes. Grid road networks are also transit-friendly as they allow transit vehicles to avoid backtracking and offer users direct access to transit stops. The cities considered to be the most pedestrian-friendly and transit-friendly in the world all have dense, web-like street networks.

In the roadway network example shown in Figure 47, arterials (shown in red) are spaced at one-half mile intervals, collector roadways (shown in blue) are spaced at one-quarter mile intervals between the arterials, and local streets (shown in green) are spaced at one-eighth mile intervals between the collectors. Based on a grid network with this spacing, each US 19 crossing point would have up to ten collector and higher-level roadways within a one-half mile radius of the node.

In comparison, the sparseness of the road network in the areas within one-half mile of crossing points along US 19 is demonstrated by the small number of collector and higher-level facilities, as shown in Map 15 in Appendix A, as follows:

- › The Countryside Mall area has five collector and higher-level roadways within one-half mile of the US 19 crossings at SR 580 and Countryside Boulevard, as well as one additional minor collector just outside of one-half mile radius; and
- › The area near the Clearwater Mall, consisting of the section of US 19 from Drew Street to Seville Boulevard, has five collector and higher-level roadways within a one-half mile radius of US 19.

Figures 47 and 48 provide a comparison between the existing and ideal local street network for the areas near Countryside Mall and Clearwater Mall. Existing roadways that could serve as part of a denser grid network

are shown in green, while the red lines indicate existing gaps in the roadway network needed to complete the ideal grid network. The ideal network reflects local or collector level roadways on one-eighth mile spacing. Based on the extent of existing gaps shown in red on Figure 48, it can be concluded that the existing roadway network around these nodes is insufficient to support good traffic circulation and transit-oriented development potential, and significant changes are required to achieve ideal levels of access and connectivity.

Although several factors may limit the potential to achieve the ideal network given fragmented ownership, limited rights-of-way, and the limited number of US 19 crossings, improvements to the existing network can be achieved incrementally. As individual projects and improvements are completed, elements of an idealized network can be incorporated. For example, should the site of the former shopping center at US 19 and Belleair Road be redeveloped, new investment could be organized around new streets and drives that provide for a more transit- and pedestrian-friendly environment and allow future extension to sites to the north.

To begin working toward long-term goals for the creation of an interconnected network of local streets, the City should undertake the following actions:

- › The City should work with local property owners to identify locations where local streets may be extended or new streets constructed to improve access and more effectively distribute traffic as long as such improvements do not result in significant increases of traffic on existing neighborhood streets.
- › The City should ensure new projects are designed to provide rights-of-way or easements to allow for effective cross-parcel circulation and extensions to access adjacent properties with development or redevelopment potential.

- › The City should identify locations within Regional and Neighborhood Centers with road rights-of-way with potential for improved sidewalks and transit stops, enhanced pedestrian crossings, improved landscaping, and the placement of wayfinding signage.

Strategy 3.2 - Improve Conditions for Pedestrian & Cyclists

The City, in partnership with the County and FDOT, should prepare plans to improve the condition, continuity, and attractiveness of facilities and amenities serving pedestrians and bicyclists. Current conditions along the corridor make non-motorized and transit travel especially uninviting—the poor quality, lack of continuity, and absence of amenities make it especially difficult to support walking, biking, and transit use as alternatives to driving, even for short trips between nearby destinations. Yet despite these barriers, demand for bicycle parking has increased in key locations, including Countryside Mall, and residents of neighborhoods along the corridor are asking for better walking and biking connections to sites along the corridor.

By improving facilities serving bicyclists and pedestrians, the City can make progress on a number of important objectives, including making transit use a more practical and attractive alternative to driving, reducing the number and length of vehicle trips on local roadways, increasing physical activity and promoting more healthy lifestyles, and improving mobility for non-driving residents.

To address deficiencies and challenges, the City should take the following actions:

- › The City should identify “Pedestrian Priority Areas” in future updates to the *Comprehensive Plan* and prioritize capital expenditures for streetscape and pedestrian improvements in

Figure 49. Pedestrian and Bicycle Crossing Best Practices

ENHANCING PEDESTRIAN & BICYCLE CROSSINGS

The following recommendations provide a starting point for the preparation of improvement and enhancement plans for pedestrian and bicycle crossings of major intersections.

- › Crossing designs should incorporate medians and median noses extending beyond marked crosswalks and use appropriately narrow travel lanes.
- › Crossing designs should incorporate smaller corner radii, which greatly benefits pedestrians by reducing the distance they have to cross while still accommodating heavy truck movements. They also benefit motorists by reducing the pedestrian signal clearance time needed, thereby providing more green time to the appropriate vehicle movements.
- › Crossing improvements at underpasses should include enhanced paving treatments, even lighting levels along sidewalks, and generous landscaping.
- › Future intersection designs should incorporate channelizing islands for left and right turning movements rather than just striping. Appropriate channelization design provides tighter angles, better pedestrian visibility and crossing safety, and improved motorist sightlines. Pedestrian crossings to right turn channelized islands can be supplemented with raised pedestrian crossings to emphasize the pedestrian movement, increase yielding to pedestrians, and slow turning vehicles down to appropriate speeds.

Raised Crosswalks at Right Turn Islands



Raised crosswalks at right turn islands improve safety by slowing turning movements and increasing motorist yielding to crosswalk occupants.

Channelizing Islands & Tight Angles



Channelizing Islands and tighter turning angles at intersections improve the visibility of pedestrians, slows turning speeds, and improves sight angles for motorists.

Center Medians & Refuge



Center medians can be designed to provide refuges for crossing pedestrians and median noses help control the speed of left turning vehicles.

High Visibility Crosswalks



High visibility crosswalks help raise motorist awareness of pedestrians and crossing locations.

Figure 50. BRT Vehicle and Stop Improvements



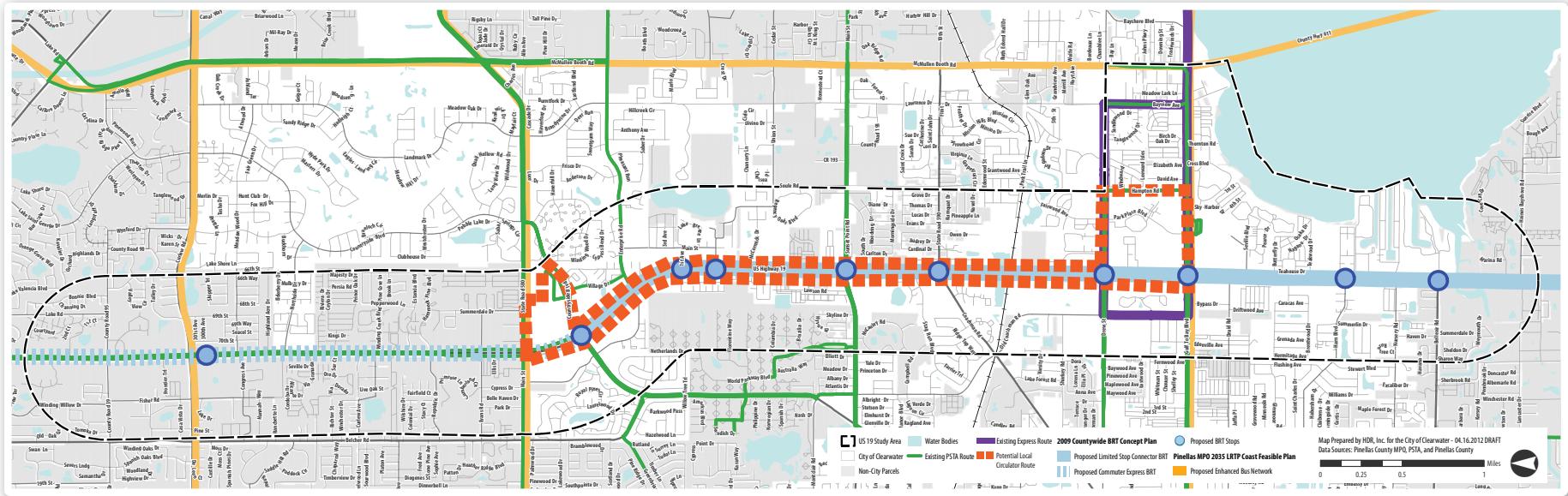
these areas. Along US 19, such areas would include the Regional and Neighborhood Centers and areas surrounding planned transit stops.

- › Working with the County and FDOT, the City should plan to provide continuous sidewalks and bike lanes. An example of an existing discontinuous facility is along the northbound US 19 frontage road, north of Drew Street, where the undesignated on-street bicycle lane exits to the access road, which does not provide a connection that continues further north. As such, bicycle traffic must either leave the undesignated lane and weave across the exit ramp, or must transition onto the sidewalk to continue north.
- › The City should establish corridor-specific design standards for new pedestrian and bicycle facilities. Standards should address the design of improvements within public rights-of-way and provide

minimum dimensions and locational requirements for new and improved sidewalks, crosswalks, and driveway crossings; design requirements for pedestrian amenities like pedestrian-scaled lighting, street furnishings, and transit stops; and standards for landscaping along local streets. The standards should also address pedestrian and bicycle facilities on private sites and provide guidance for cross-parcel pedestrian circulation, pedestrian connections between sidewalks and pedestrian entries to buildings, and bicycle access and parking (See Figure 49).

- › Working with FDOT, the City should prepare plans to upgrade and enhance existing pedestrian crossing locations, with the goal of exceeding minimum design standards for pedestrian and bicycle accommodations. With very limited opportunities for pedestrian and bicycle crossings on US 19 and major crossroads like Gulf to Bay Boulevard, Drew Street, Countryside Drive, and SR 580, it is essential that intersections are designed to be as compact as possible, keeping exposed crossing distances short through channelization, designing for slow-speed turning movements rather than high-speed free flow movements, and providing adequate lighting of crossing areas.
- › Policy and standards should be prepared to ensure street crossings are designed to be convenient and direct—pedestrians should not be required to cross multiple intersection legs when a more direct route is possible. Numerous locations currently have pedestrian crossings that are inconvenient. For example, the northbound US 19 frontage road intersection at Drew Street, where pedestrians desiring to cross the intersection from north to south or vice-versa are required to cross three legs instead of just one based on the existing placement of crosswalks. This creates extra delay for pedestrians who have to wait through three signal cycles to cross the intersection legally, and encourages pedestrians to cross the roadway away from the intersection.

Figure 51. Potential US 19 Local Circulator



- › The City should prepare plans to improve pedestrian connections from sidewalks and trails to adjacent land uses, consistent with the *Pinellas County Pedestrian Safety Action Plan* prepared in August 2009, which offers recommendations regarding pedestrian-friendly connections to commercial uses, driveway designs, and lighting. For sites with frontage on the Progress Energy and Ream Wilson Trails, the City should require property owners to provide cross-parcel easements and construct improvements to allow pedestrian connections from local streets and sidewalks.

Strategy 3.3 - Advocate for Enhanced Transit Service

The City should continue to work with PSTA, the County, and the local business community to promote higher levels of transit use and make transit a more attractive and convenient means to travel. Plans should

be prepared for the improvement of service levels, the enhancement of facilities and amenities, and the improvement of connections between destinations and transit stops. To accomplish this, the City should take the following actions:

- › The City should work with PSTA to examine the potential to increase headways for service on top corridor routes (especially routes on US 19 and SR 60) by reducing the number of stops that may be replaced or supplemented by a local circulator. Reducing the number of stops will produce travel time savings which can be used to increase service frequency and attract additional riders.
- › The City should evaluate existing and planned park-and-ride facilities to ensure convenient access to BRT and commuter express stops; evaluate the potential to allow park-and-ride spaces to count toward meeting parking requirements; and require that

such park-and-ride spaces be located near stops and include necessary amenities like lighting, shelters, bike racks, and waste receptacles.

- › Working with PSTA, the City should prepare plans for improvement of essential infrastructure, such as high-quality buses, shelters, and customer information. The City should incorporate transit-supportive infrastructure requirements with site development/redevelopment, such as sidewalk connections from the street to front of building, pedestrian-scale lighting, and landscape and streetscape to enhance pedestrian connections to transit.
- › When coordinating with the County and FDOT on sidewalk improvement plans and projects, the City should place an emphasis on access to bus stops and connections between bus stops and major destinations. Specific attention should be given to planning and providing bicycle and pedestrian systems around transit stop locations such that new stops do not disrupt or impact these systems.
- › The City should evaluate the impacts of parking policies on public transportation and the potential for encouraging transit use through parking disincentives (e.g., cost and availability) and examine reduction of parking requirements for transit-served sites that contribute infrastructure (e.g., park-and-ride spaces or sidewalk and streetscape improvements) to enhance transit.
- › The City should work with PSTA to explore the potential to expand partnerships with the business community to help pay for existing and expanded transit services. As part of the process, the City should explore the potential to use a tax increment or other benefit assessment mechanism to leverage local tax revenue generated from the appreciated value of transit-served development in proportion to the benefits the transit service provides.

Strategy 3.4 - Plan for Circulator Service

The City should work with PSTA to explore the feasibility of establishing a local circulator service connecting the Countryside and Gulf to Bay/Drew Regional Centers and enhancing accessibility around major transit centers and BRT stations. As called for by PSTA in the current *Transit Development Plan* (TDP), expanded circulator services should be implemented in key locations to enhance accessibility around major transit centers and BRT stations. Neither the TDP nor the Pinellas MPO's *Long-Range Transportation Plan* (LRTP) recognize the US 19 corridor for this expanded circulator service.

In light of the redevelopment potential for mixed-use dense development in current areas of high activity such as the Clearwater Mall and Countryside Mall, a local circulator in this area could greatly enhance BRT and fixed-route service as well as reduce local automobile trips for "choice" riders. As shown in Figure 51, a service operating between the anchors of the Countryside and Clearwater Malls and serving development from the frontage roads along US 19 could enable BRT riders to gain greater access to shopping and employment opportunities. This initial service concept is intended to supplement existing transit services; however, realignment of existing service to minimize duplication of routes may provide cost-savings from existing service that help make the circulator feasible. A local circulator should function as a development amenity and help to brand the corridor. As such, the service may be developed through various assessment or tax increment finance options.

4. SUSTAINABILITY

The sustainability goals and strategies presented in *Clearwater Greenprint* provide important guidance for future planning and development along US 19. *Clearwater Greenprint* goals for lessening the amount of greenhouse gas (GHG) emissions, making buildings and transportation systems more energy-efficient, expanding mobility choices, maintaining a healthy economy, reducing waste, and conserving sensitive resources serve as a foundation for this plan's recommendations for redevelopment and revitalization, land use intensification, economic development, and the promotion of walking, biking and transit use.

In addition to the land use, mobility, and economic development recommendations presented in above, the following strategies offer recommendations to achieve *Clearwater Greenprint*'s goals of promoting more sustainable design practices in public and private projects and achieving more energy- and resource-efficient kinds of development.

Sustainability strategies for the corridor are organized around the following categories:

- › Expand Green Street Program and Initiatives;
- › Encourage Low Impact Development for Sites and Buildings; and
- › Promote Energy and Water Efficiency.

Strategy 4.1 - Expand Green Streets Program & Initiatives

Working in collaboration with FDOT and Pinellas County, the City should explore the potential to implement Green Streets programs and initiatives to incorporate the use of innovative stormwater management techniques and features in the design of new and redesign of existing streets, streetscapes, and rights-of-way. A Green Streets approach to the improvement of roadways and streetscapes can be used to manage

Figure 52. Green Street Designs to Manage Stormwater Runoff

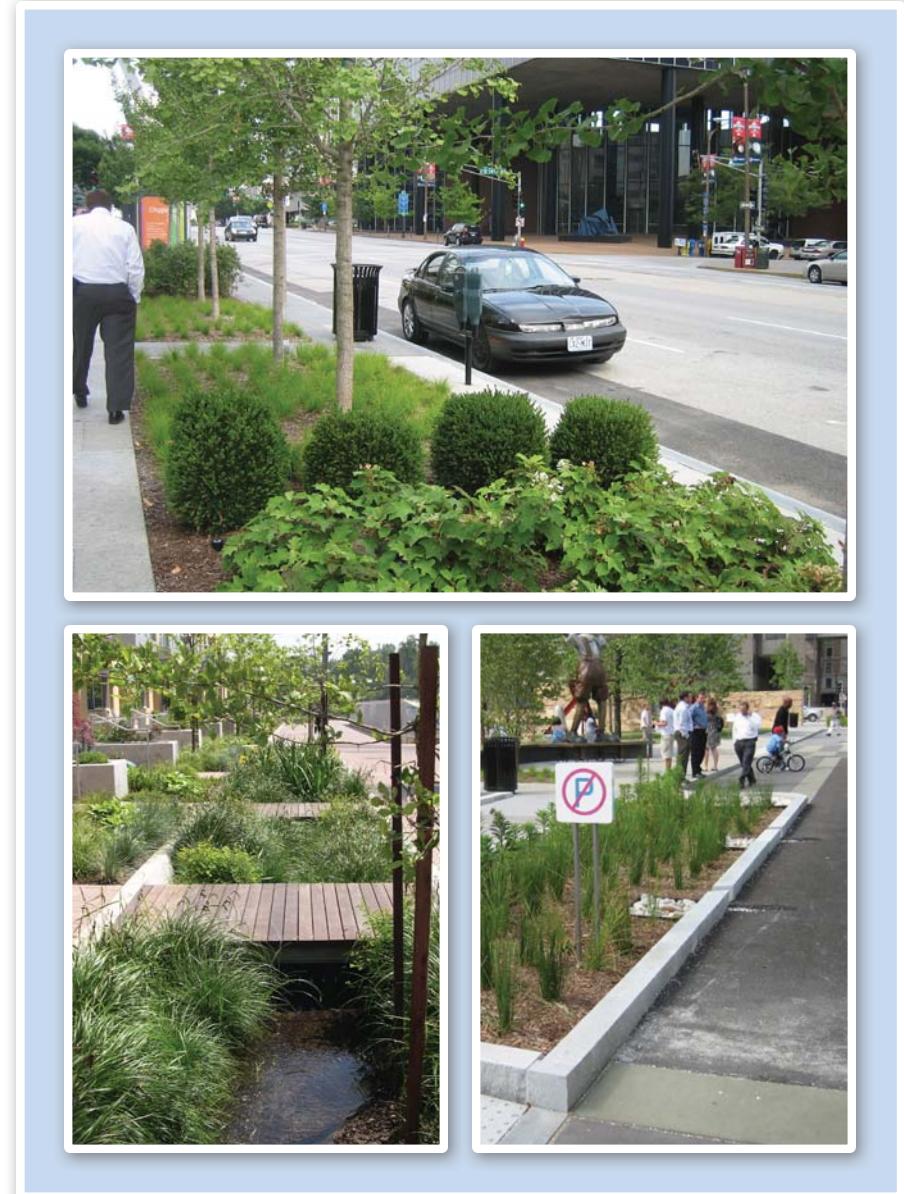


Figure 53. Features of Green Streets and Low Impact Development

FEATURES OF GREEN STREETS & LOW IMPACT DEVELOPMENT

Vegetated Swales. Vegetated swales are shallow, open-channel drainage ways designed to accept runoff from street surfaces and convey the runoff across landscaped areas in a broad shallow flow. Swales are used to reduce stormwater volume through infiltration, improve water quality through vegetative and soil filtration, and reduce flow velocity by increasing channel roughness. Additional benefit can be attained through more complex forms of swales, such as those with amended soils, bioretention soils, gravel storage areas, underdrains, weirs, and thick diverse vegetation. Within rights-of-way, swales are typically located in the landscape area between the sidewalk and the edge of on-street parking or travel lanes.

Rain Garden Curb Extensions, Medians, and Infiltration Planters. Rain gardens are a form of bioretention that be incorporated into the design of sidewalk planter areas, roadway medians, and curb extensions. Rain gardens are designed to support infiltration and storage of stormwater runoff, attenuation of peak flows, and stormwater filtration through through vegetation and soil. Where street trees are included in sidewalk planting areas, the use of larger tree boxes or structural soils, root paths, or

“silva cells” can be used to expand root zones and extend the benefits of incorporating rain gardens in streetscape design.

Permeable Pavement. Permeable pavement comes in four basic forms: permeable concrete, permeable asphalt, permeable interlocking concrete pavers, and grid pavers. Permeable concrete and asphalt are similar to their impervious counterparts but are open graded and typically have a special binder added. Methods for pouring, setting, and curing these permeable pavements also differ from the impervious versions. The concrete and grid pavers are modular systems. Concrete pavers are installed with gaps between them that allow water to pass through to the base. Grid pavers are typically a durable plastic matrix that can be filled with gravel or vegetation. All of the permeable pavement systems have an aggregate base in common which provides structural support, runoff storage, and pollutant removal through filtering and adsorption. To maintain long-term permeability, many systems will require surface cleaning to remove organic materials (leaves, for example) and periodic vacuuming and low-pressure washing to clear out voids.

Adapted from the Low Impact Development Center’s Green Streets website (<http://www.lowimpactdevelopment.org/greenstreets/background.htm>).

stormwater on site through use of vegetated facilities designed to intercept and infiltrate rainwater before it enters the public storm system thereby reducing the need to dig up and upsize the existing piped infrastructure. Green Streets projects can provide water quality benefits and replenish groundwater as well as create attractive streetscapes that enhance the pedestrian environment and introduce park-like elements into development and redevelopment projects.

Research conducted by the Environmental Protection Agency and communities across the United States has shown that Green Streets

projects have the potential to deliver a range of benefits, including the following:

- › improved water quality by reducing the volume of polluted stormwater entering wetlands, streams, and bays;
- › reduced impervious surface so stormwater can infiltrate to recharge groundwater and surface water;
- › increased urban green space;
- › improved air quality and reduced air temperatures;
- › reduced demand on stormwater management systems; and

- › assist the City in addressing requirements of federal and state regulations designed to protect watershed health.

To implement Green Streets programs and initiatives along the US 19 corridor, the City should take the following actions:

- › Prepare Green Streets standards for use in the design of public space, street, and streetscape projects along the US 19 corridor. Example standards, including design drawings and specifications, in use by other communities may serve as a starting point for the development of standards for use by the City.
- › Work with the County and FDOT to identify locations for Green Streets demonstration projects.
- › Continue coordination between City, County and State entities to encourage consideration of watershed health and improved water quality through use of Green Streets practices as part of the planning and design of publicly-funded roadway, streetscape, bicycle/pedestrian, transit, and stormwater management projects.
- › Plan for use of Green Streets projects as a means of better connecting destinations along US 19 with the Progress Energy and Ream Wilson Trails and surrounding neighborhoods.
- › Develop standards and incentives (such as financial and technical resources, or facilitated permit review) for Green Streets projects that can be permitted and implemented by the private sector. These standards and incentives should be designed to encourage incorporation of Green Streets designs into private development and redevelopment projects.
- › Develop a predictable and sustainable means of funding implementation, evaluation, and maintenance.

Strategy 4.2 - Promote LID for Sites & Buildings

The City should continue working with Pinellas County and the Southwest Florida Water Management District to complete and implement LID standards for public and private development.

LID is an ecologically friendly approach to site development and storm water management that aims to mitigate development impacts to land, water, and air. The approach, gaining rapid acceptance in communities as a way to meet regulatory stormwater requirements and resource protection goals, emphasizes the integration of site design and planning techniques that conserve natural systems and hydrologic functions on a site. Specifically, LID projects and practices in built environments aim to:

- › prevent degradation of water quality and natural resources;
- › manage storm water more efficiently and cost effectively; and
- › maximize the potential for stormwater reuse.

A LID system employs various devices that filter water and allow water infiltration into the ground and thus differ from conventional stormwater systems as they promote the use of land forms, landscape areas, and built structures to both distribute stormwater and collect rainwater. LID designs encompass the use of structural devices (engineered systems) and non-structural devices (vegetated, natural systems) used in combination to maintain or restore the natural hydrologic functions on a site with the goal of reducing the impact of development.

LID site design strategies address the arrangement of buildings, roads, parking areas, site features, and elements of the stormwater management system. LID designs build on conventional stormwater design strategies by using site and building surfaces to retain, detain, store, change the timing of, or filter runoff in a number of different

Figure 54. Sketches of Low Impact Development Design Strategies



configurations and combinations. An overview of prevalent site design techniques follows:

- › reducing imperviousness by reducing street widths and by using permeable paving or landscaping to break up expanses of impervious surfaces;
- › directing runoff into or across vegetated areas to help filter runoff and encourage groundwater recharge;
- › preserving or designing naturally vegetated areas in close proximity to parking areas, buildings, and other impervious expanses to slow runoff, filter out pollutants, and facilitate infiltration;
- › removing curbs and gutters from streets and reducing curb cuts, parking areas, and parking islands to allow storm water sheet flow into vegetated areas;
- › using devices such as rain gardens, vegetated swales, infiltration trenches, and underground dry wells to increase storage volume and facilitate infiltration;
- › grading parking and landscaped areas to lengthen flow paths and increase runoff travel times;
- › maintaining natural drainage divides to keep flow paths dispersed;
- › disconnecting roof downspouts from drainage systems and redirecting stormwater into vegetated areas or water collection devices;
- › installing vegetated roofs or garden roofs;
- › using native plants (or adaptable species) to establish an adaptable and low-maintenance landscape that requires less irrigation and is appropriate for the climatic conditions; and
- › using naturally occurring bio-chemical processes in plants located in vegetated swales and rain gardens.

LID designs can also be designed to achieve on-site reuse of rainwater and water conservation. By using above-ground LID devices to channel and collect rainwater from roofs and using sub-surface facilities to treat

and collect runoff from roads and sidewalks, stormwater and runoff can be recycled and used for irrigation and other non-potable purposes. Disconnected roof drains, cisterns, sub-surface stormwater retention facilities (below parking lots), rooftop channels, and rain barrels are used in combination to capture, store, and reuse rainwater.

In planning for the capture, storage, and reuse of stormwater several important factors must be considered: 1) the City's current regulations addressing the use of greywater systems must be revised; 2) owners must carefully assess the costs and long term operation and maintenance of systems; and 3) designs should account for issues associated with the collection and storage during peak summer rainfall so reuse is possible during peak water demand times in winter and spring.

Strategy 4.3 - Improve Energy & Water Efficiency

As called for in *Clearwater Greenprint*, the City should continue to explore ways to incentivize and promote the use of energy and water conservation in the design of new and the retrofit of existing buildings. Specifically relevant to the US 19 corridor are *Clearwater Greenprint* recommendations calling for the creation of new Community Development Code provisions related to localized energy production through the installation of solar panels or compact wind turbines and energy efficiency and conservation measures for new construction and substantial renovation.

The City also should explore regulatory strategies to minimize the use of irrigation, incentivize the use of reclaimed water where available, and promote the on-site capture and reuse of rainwater for irrigation. Indoor water efficiency efforts should promote the use of efficient toilets, urinals, and rinsing and cleaning facilities. The City should also explore techniques to use heating, ventilating, and cooling (HVAC) system condensate as on-site alternative water supply for use in toilets and landscaping.

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