



# THE CITY OF CLEARWATER **EAST GATEWAY DISTRICT** VISION PLAN

JANUARY 2012

**Gensler** + SocialCompact



## ACKNOWLEDGEMENTS

We would like to recognize with deep appreciation everyone who assisted in the development of this **VISION PLAN** for his/her devotion and dedication of personal time, skills and thought leadership to promote this process of community building.

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# INTRODUCTION



# INTRODUCTION

The City of Clearwater, the third largest city in the Tampa Bay region, is a coastal community of approximately 132,000 residents, including the Enclaves. Over the last decade, the City of Clearwater's economic development priorities have focused largely on the redevelopment of the beach and the downtown core. The City and the Community Redevelopment Agency (CRA) have seen success in both of these areas over the last several years. The East Gateway District represents 39 percent of the CRA's area and is one of the CRA's focus areas for improvement.

## PURPOSE

In 2008, faced with continuing neighborhood issues and prospects for positive change through a newly approved Five-Year Action Program, residents, business owners and impacted individuals from adjacent neighborhoods organized under two community

groups to advocate for the implementation of the Five-Year Action Program. These involved stakeholders have expressed general support for redevelopment and other infrastructure investments (such as streetscaping) in the District but are concerned that the East Gateway District Vision and Land Use Plan/ Redevelopment Plan in the Downtown Redevelopment Plan does not reflect community preferences and might not provide for optimal build-out of this downtown district. In June 2009, the East Gateway Stakeholders Advisory Group (the steering committee for the Five-Year Action Program) recommended that the City engage the community in redefining a vision for future development and community character of the East Gateway, with the anticipation of land use and zoning changes indicated by the outcome of the vision process.

On May 31, 2011, the Community Redevelopment Agency (CRA) of the City of Clearwater, a Florida Redevelopment Agency, and M. Arthur Gensler, Jr. and Associates, Inc., with their market/economic consultant, Social Compact, entered into a contract for the East Gateway District Vision Plan.

## GENSLER

Founded in 1965, Gensler is a professional services firm that provides architecture, design, planning and strategic consulting services to clients worldwide. Throughout over 45 years of growth and change, we have fostered a passion for design's power to make a real difference for the organizations and people we serve. We have been pioneers in creating great places that enhance the quality of work and life.

**Placemaking** Gensler's planning and urban design practice area taps into the complementary disciplines of consulting, interior design, architecture and brand design - to transform public spaces into living spaces.

We understand how to plan for the complex balance of elements needed for communities to be successful, sustainable and attractive. That is why our plans consider journey times; access to green spaces; the infrastructure of local shops, employment, schools, transport, health and leisure facilities; as well as the ergonomics, infrastructure and sustainability of a site.

Gensler's strength in economic and business analysis means we can pinpoint emerging opportunities for our

## INTRODUCTION

clients in new business areas and global markets, and help them create planning strategies to capture those opportunities.

The people that shape cities today are amazingly well travelled, with a real desire to learn about the successes and failures of others and do better. Our global planning team allows clients to access that level of knowledge - the more you've seen, the broader your experiences and the better the dialogue about the possibilities of a particular site.

We are helping to shape the future by planning many of the most important developments around the world, from Boca Raton, FL to Dubai, from Chicago to Shanghai. However big or small a project is, our global expertise is an advantage, as it helps us deliver a plan that harnesses the full potential of a site and/or community, informed by the best new ideas and developments worldwide.

### SOCIALCOMPACT

Social Compact is a nonprofit, nonpartisan organization formed by coalition of business leaders from across the country committed to promoting

successful investment in lower-income communities. Working in close partnership with community and corporate leaders over the past decade and a half, Social Compact has pioneered the **DrillDown™**, a methodology to analyze inner-city markets and create accurate, business-oriented profiles of "emerging" neighborhood markets.

Drawing on business disciplines and community strength, these DrillDown profiles have a strong track record of catalyzing sustainable, private investment, benefiting communities and businesses alike. Social Compact's innovative research fills a void in the market: replacing outdated, deficiency-based data on lower-income communities with reliable market analysis to drive better investment decisions in underserved communities. The goal: safe and healthy neighborhoods in which to live and do business.

In addition to its cornerstone research product, the DrillDown, Social Compact staff have expanded the organization's research capabilities to include evaluations and assessments, consumer expenditure and consumer behavior surveys, and technical assistance programs geared toward building capacity

among community groups to use information to guide economic development decisions.

### PROJECT SCOPE

The CRA requested professional services through RFP #15-11 to develop a comprehensive and collaborative neighborhood vision plan that is expected to address three main areas:

- 1) A Neighborhood Market/Economic Analysis that defines the economic base for market-supportable revitalization efforts;
- 2) Community Outreach and Stakeholder Involvement culminating in a Community Design Charrette that provides a strong, clear vision of the area and responds to current and future market opportunities; and
- 3) A Concept Plan and Policy Framework that identify specific implementation actions and tools that help achieve the vision over a 20-year horizon.

# 2

## EXECUTIVE SUMMARY



**VISION:** AS AN “URBAN EDGE” COMMUNITY, THE EAST GATEWAY DISTRICT OFFERS UN-PARALLELED OPPORTUNITIES NOT FOUND ANYWHERE ELSE IN THE GREATER CLEARWATER AREA. THE DISTRICT HAS ALL THE QUALITIES OF TRADITIONAL NEIGHBORHOOD DEVELOPMENT, LIVE/WORK/PLAY & EDUCATE IN A CULTURALLY DIVERSE SETTING, VIGOROUSLY SOUGHT OUT BY A DEMOGRAPHIC OF YOUNG PROFESSIONALS, FAMILIES AND AGING ADULTS. THROUGH THE CLEVELAND STREET AND GULF TO BAY CORRIDOR ENHANCEMENTS, A STRONG OPEN SPACE CONNECTIVITY STRATEGY FOCUSED ON STEVENSON CREEK, AN EXPANDING COMMERCIAL ANCHOR AT MISSOURI AND CLEVELAND AND THE DEVELOPMENT OF AN IDENTIFIABLE CORE “PLACE” TO CONGREGATE AND CELEBRATE, THIS WALKABLE MIXED-USE COMMUNITY WILL BECOME A DESTINATION FOR AN EMERGING MARKET OF RESIDENTS AND VISITORS ALIKE.

## EXECUTIVE SUMMARY

The East Gateway District has all the offerings of a traditional neighborhood development: live, work, play and educate, and is uniquely located on the urban edge of the world-class destination beaches of Clearwater, Florida. Atypical to the surrounding bedroom communities with primarily residential clustering, the East Gateway District has the potential to emerge at the right demographic time when young professionals are returning to the urban mixed-use environment. Creation of a “place” is critical within the community. This place can be created through the development of a brand strategy centered around a walkable destination corridor. Complete community connectivity can be achieved through a revitalized corridor and an open space network created along the Stevenson Creek easement.

### MARKET/ECONOMIC ANALYSIS

The market/economic analysis of the East Gateway District aims to reveal market strengths and opportunities commonly overlooked by traditional market analysis methods.

This market analysis indicates that the area has all of the components to become a more livable community, a neighborhood where residents can work, live and access most of the services and businesses they need. The area is at a transformative point to change the trajectory of the economy and improve quality of life for current and future residents and businesses.

In summary, the market analysis for the East Gateway Community and the Extended Study Area suggests that these areas are, for the most part, sufficiently served with financial services, groceries, and retail/restaurant providers. Nonetheless, there is a very small apparel leakage that could potentially support 5,500 square feet of this type of retail.

In addition, the East Gateway District exhibits several positive trends that merit consideration:

- Stable population growth trend;
- Age and ethnic diversity;
- Higher income density per square mile; and
- High rate of micro-businesses, exhibiting entrepreneurial spirit.

The *Progressive Analytics for Development (PAD)™* has the following principal conclusions or findings within the analysis and research that drive the following recommendations:

- Change perceptions and negative influences that impact community image, attractiveness, safety and redevelopment opportunities;
- Encourage and support restaurant and shopping destinations focusing on local, unique shops, ideally a combination geared towards both City residents’ and tourists’ needs;
- Capture the additional revenue generated by the increased visitors to the area and their increased expenditures;
- Create more foot traffic in the East Gateway (toward a more walkable community).
- Support businesses that make the area a destination area;

## EXECUTIVE SUMMARY

- Consider FrankCrum and UMA as anchor institutions to create additional jobs for the residents and the greater community; and
- Increase residential density (consider establishing affordable housing opportunities for employees and students that work and study in the East Gateway District).

### COMMUNITY INVOLVEMENT

The **Vision Plan Steering Committee** was formed to serve as the conduit to the planning team, both consultants and City staff, and the greater community that they represented to channel information and set direction for integration. Its members included members of the Business and Neighbors Association (BNA), the Stakeholders Advisory Group (SAG), and prominent businesses in the East Gateway District.

The redevelopment of the East Gateway District is a process that brings together a variety of data, information, knowledge and perspectives to create a directive that is factually based in existing and ongoing summation of conditions, as best understood and recorded, within the immediate boundaries and

surrounding areas of influence. Information was distributed in a variety of formats including electronic, printed material within existing newsletters, press releases, door hangers, etc.

The **Focus Group Vision Sessions** allowed us to reveal our preliminary findings of both market feasibility and physical attributes to the community. This setting gave us the opportunity to hear directly from the community and collect the goals, desires, their own personal observations, likes/dislikes and discuss other comparable communities they felt were representative of the environments they would like to see in the East Gateway District. Additionally, City Staff conducted a Focus Group meeting in Spanish for the local Hispanic residents and business owners. During the meeting, they reviewed the scope of work and preliminary findings and received valuable input from the participants.

During the **Charrette/Community Workshops**, we reviewed market data and community goals, discussed “comparable” communities, reviewed development sites and project possibilities, looked at preferred

alternatives for projects, locations, and priorities, and discussed opportunities for marketing and brand positioning.

In addition, we surveyed the employment base at **FrankCrum**, faculty and students at Ultimate Medical Academy (**UMA**) and the parents and staff at **St. Cecelia's Interparochial Catholic School**. We polled these groups on a variety of topics because of their reach across a variety of demographics and the need for outside perspective from people that visit the District but do not live in the study area.

### CONCEPT PLAN

As we looked at the overall development opportunities within the East Gateway, we first mapped the existing development types categorized in general terms as commercial; residential (single-family and multi-family); institutional; and open space. These differ slightly from land-use or zoning maps only to reinforce the communal nature of the District. General issues that are widespread across the District and need to be addressed through community perseverance and policy commitment entail:

# EXECUTIVE SUMMARY

## District Development

### ***Neighborhood Appearance***

Improve street appearance throughout the neighborhoods and the commercial corridor. Street appearance either demonstrates a sense of pride and resurgence or is evidence of a decaying community. Support art and landscaping projects to beautify the area.

### ***Social Services***

The fallout of loitering and the constant presence of the homeless, whether real or perceived, is that the safety and well-being of residents, employees and visitors is at risk. We recommend the continued negotiation for the relocation of certain social service providers to a site outside of the East Gateway District.

### ***Transit and Transportation***

Explore the extension of transportation services like the Jolley Trolley and additional routes from the PSTA to and within the District. This will greatly affect the attractiveness and viability for redevelopment as the East Gateway is adjacent to the Downtown and a few minutes away from the beaches.

## ***Business Assistance***

Encourage the formation of a coalition of various businesses groups (restaurants, legal services, property management, etc.), to assist each other, share resources and form alliances to promote the District as a business-friendly environment and build upon their respective successes.

## ***Safety/Security***

Encourage and enhance community policing to continue improving the crime statistics in the community. Expanded crime watch and similar community programs need to be encouraged in the neighborhoods with an organized reporting/recording process of suspicious activities, however minor. Increased patrolling of known problem areas would deter and possibly drive undesirable activities out of the District. Extended daytime patrolling near the Soup Kitchen and the day-labor centers will further deter the loitering and the presence of undesirable activities. Installation of campus-style emergency call stations at strategic locations throughout the community with a well-publicized security campaign will demonstrate a directive toward a safer and more secure community environment. Although

lighting is relatively good along the major corridors, consistent and continuous coverage throughout the neighborhood streets will offer increased security and a comfort level to the residents and visitors.

Through our research, understanding of the physical context, market analysis, demographic trends and extensive community participation sessions, we identified four zones for focus of redevelopment efforts.

## ***Zone I West Commercial Anchor***

The intersection of Missouri Avenue and Cleveland Street has been recognized as a major entry node in the East Gateway District. We recommend it be developed as such because our market research has indicated that Zone I is an “attractor” from the region for commercial activities. The extension of the Cleveland Streetscape improvements needs to continue east to support development needs and create extended stay and additional commercial interaction for regional customers.

## EXECUTIVE SUMMARY

Ultimate Medical Academy (UMA) and FrankCrum are regional educators and employers adding vitality and an economic base to this Zone and are to be engaged for the area's success and their growth and expansion.

The former Economy Inn site, at approximately 2.2 acres, presents several key opportunities with a development density of .55 (FAR) floor area ratios (52,700 sf), and a residential density of 30 units/acre (66 units), and upon further study it can comfortably support a mix of these entitlements.

### **Zone II Corridor Development**

The opportunity to address the Cleveland Street and Gulf to Bay Boulevard as a development Zone comes through a corridor re-design due to the re-routing of the beach traffic onto Court Street with the opening of the Memorial Causeway Bridge.

Transition from a vehicular-oriented corridor to a pedestrian-oriented corridor changes the dynamic of the community and focuses the marketing and branding of the area as a destination place.

We recommend the immediate initiation of the Cleveland Streetscape Phase III because it is a crucial component of the revitalization process and it will accelerate neighborhood improvements. We also recommend an overlay as an amendment to the existing regulatory documents and utilize the concepts expressed in the existing Clearwater Downtown Redevelopment Plan.

### **Zone III Open Space**

As a community on the "urban edge", the East Gateway has the offering of open space that not only makes it an attractive alternative to the "urban core", but becomes that differentiator that can distinguish a community. The natural amenity of Stevenson Creek running through the literal center of the community has the opportunity to create that differentiator. This open space plan serves as the connector to the peripheral community park amenities of Glen Oaks Park and the Clearwater Country Club.

The Vision Plan reflects the culmination of several goals, desires and opportunities: the transformation of retention ponds into community parks through simple trail/boardwalk and pavilion offerings, community

gardens, and the need for a children's playground within the community to minimize the crossing of high-volume Court Street.

### **Zone IV Festival Core**

Through the transformation of the Cleveland Street and Gulf to Bay corridor, and the creation of a walkable district, the establishment of a core gathering place is essential for community identity, pride and ownership.

The obvious location to create such a place is at the crossroads of major thoroughfares where linkages to the surrounding neighborhoods and the greater community are simple and direct. East Gateway's "main & main" occurs at the intersection of Cleveland, Gulf to Bay and Hillcrest. At this key location an iconic feature can create the "place" that becomes the gathering spot or meeting place.

As Cleveland Street continues eastward, the lane reduction within the existing right-of-way affords an opportunity to increase the edge landscape and develop approximately 1.7 acres for larger events. Alternative event planning, in cooperation with the

## EXECUTIVE SUMMARY

surrounding business community, incorporates the utilization of the surface parking lots and expands the Festival Core.

### POLICY FRAMEWORK

Zoning codes have evolved over the years as urban planning theory has changed, legal constraints have fluctuated and political priorities have shifted. It has also been argued that zoning laws work against economic efficiency and, therefore, hinder development in a free economy. A poor zoning restriction could hinder the optimal efficient usage of a given area.

The proposed Future Land Use and operating policy for the District offers a semblance of uniformity and begins to shape a directive as to the intent of differing development zones for more definitive range of development types.

In our review of the Future Land Use and Existing Zoning District parcels, we can identify several parcels that could better serve the community and possibly the land owners by a change of land use and zoning categories.

The opportunity to create an Overlay District within the community offers several advantages that can work within the existing policies, but allows greater flexibility and focused opportunities within select areas.

The research, community outreach and formation of an appropriate Overlay District for the East Gateway CRA should be a high priority in the near term.

### STRATEGY/RECOMMENDATIONS

#### GOAL: DISTRICT DEVELOPMENT

- Change perception and negative influences that impact the community image, attractiveness, safety and redevelopment opportunities.

#### GOAL: CREATE A VIBRANT MARKET

- Encourage and support restaurant and shopping destinations focusing on local, unique shops, ideally a combination geared towards both city residents' and tourists' needs.
- Create more foot traffic in the East Gateway District (toward a more walkable community).
- Focus on business development to support local institutions.

#### GOAL: CONCEPT PLANNING ZONE I

- Focus development near the Missouri Avenue and Cleveland Street intersection as a commercial anchor through a strategic concentrated development initiative.

## EXECUTIVE SUMMARY

### GOAL: CONCEPT PLANNING ZONE II

- Create a district corridor along Cleveland Street and Gulf to Bay Boulevard as a “complete street” within a redevelopment district promoting walkability, shared resources and edge conditions for a vibrant community destination.

### GOAL: CONCEPT PLANNING ZONE III

- Develop a north-south connectivity axis of open space and community amenities along the Stevenson Creek drainage basin.

### GOAL: CONCEPT PLANNING ZONE IV

- Create a central gathering place where the community can come together for regularly scheduled events and activities, offering a sense of place and a community destination core.

### GOAL: BRANDING STRATEGY

- Create a strategy to rebrand the East Gateway District as a cohesive vibrant destination community to live, work, recreate and educate. As part of this goal, the City should explore the opportunity of renaming Gulf to Bay Boulevard through the branding process.

### GOAL: POLICY/FRAMEWORK

- Modify the existing policy/framework to assist in the redevelopment process and ease some of the restrictive or negative policies that currently are controlling the area's growth. We recommend that the City introduce form-based code as a regulatory tool to assist in the redevelopment process.

We believe that these strategies and recommendations will set forth the implementation tools to initiate the vision plan created by the East Gateway District community.

# 3

## PLANNING PROCESS



## PLANNING PROCESS

To develop a vision that was truly authentic and community-driven, the planning team looked for indicators that emerged through a process of discovery. The personality of the community revealed itself and formed a directive by balancing three major form givers: **Context** (General and Physical), **Data Gathering/Research** and **Community Participation**.

At the onset of the project, Gensler/Social Compact planning staff scheduled a kick-off meeting with City and CRA officials to establish a dialogue, a communication network/directory and facilitate a process for smooth, reliable and consistent interaction. This was the conduit for the planning team and the City of Clearwater for what became a continuous interaction and conveyance of documents and information. The Vision Plan Steering Committee was established with members chosen from the Stakeholders Advisory Group (SAG), leadership of the Business & Neighbors Association (BNA) and

prominent members of the East Gateway business community to act as a sounding board and guiding force when interacting with the community and provide directives to the engagement process.

The team immediately initiated a data gathering process with the City's assistance and other network tools to build a base of knowledge that was broad in scope to allow the team to understand the contextual nature of the East Gateway District. We looked to the Vision Plan Steering Committee and City staff to help us better understand the historical, cultural, environmental and social aspects of the community, as well as the day-to-day views of living, working, commuting and interacting within the City at large.

### GENERAL CONTEXT

The City of Clearwater, the third largest city in the Tampa Bay region, is a coastal community of approximately 132,000 (including the Enclaves). The city is comprised of diverse neighborhoods and businesses that span the Pinellas County peninsula between the Gulf of Mexico and Tampa Bay. As the county seat, Clearwater supports a variety of government offices and businesses in its downtown



central business district. In addition, Clearwater Beach is an international tourist destination bringing millions of visitors to the city each year.

Over the last decade, the City of Clearwater's economic development priorities have focused largely on the redevelopment of the beach and the downtown core. These areas were targeted for improved performance as the City's primary economic generators. The City and the Community Redevelopment Agency (CRA) have seen success in both of these areas over the last several years, with some important projects completed. Activities in this area will continue into the future to build upon the gains made to date and ensure the City receives the "return on investment" sought by its efforts. One of the CRA's focus areas for improvement is the East Gateway District.

The East Gateway District (District) represents 39% of the CRA. Approximately 24 acres of the District are part of the original CRA that was established in 1981. The balance of the District was brought into the CRA through an expansion in 2004.

## PLANNING PROCESS

### PHYSICAL CONTEXT

The 176-acre East Gateway District is a neighborhood located on the eastern end of downtown. The District's southern boundary coincides with SR 60 (Gulf to Bay Boulevard), which is the primary transportation corridor to the downtown and the beach.

The physical context offers the visual and regulatory setting from which the vision plan will reside. The make-up of the variety of uses within the District - residential (both single and multi-family),

commercial/retail/office, right-of-way, open space or public realm - and how they are connected, disjointed or how they interact with each other offers a starting point in the development of a community vision.

The East Gateway District is characterized by a mixed land use pattern. Residential areas are interspersed with pockets of poorly maintained properties, the majority of which are rentals, and underutilized and obsolete strip commercial developments. East Gateway's commercial sector is burdened with a



declining business base, deteriorating infrastructure, a mismatch of uses and vacant storefronts. Platting and development practices from an earlier era are nonconforming to current regulations, creating widespread impediments to redevelopment in the neighborhood. Additional struggles stem from a negative image associated with crime, problematic uses that attract loitering and illicit activities, and a chronically homeless population.

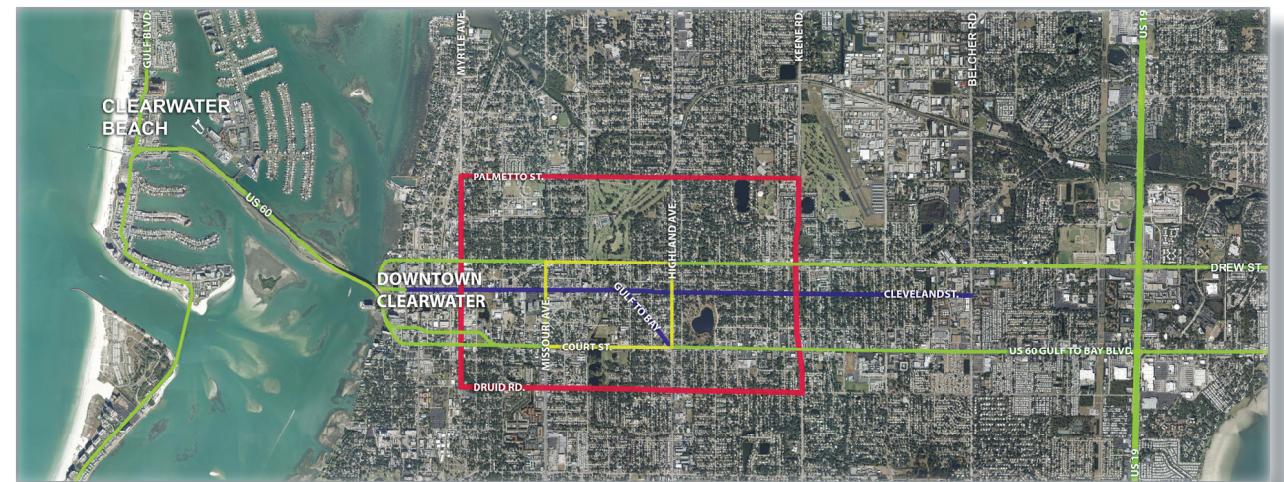
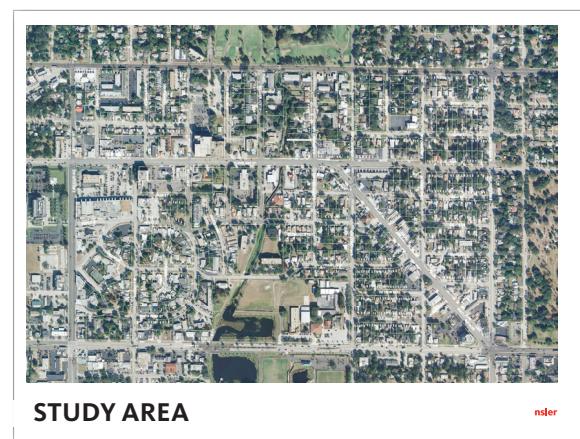


## PLANNING PROCESS

The appearance or condition of the public realm, streetscape or curb appeal often defines a community. The terrain, natural features, street grid and opportunities for distinction can distinguish one community from another and shape its future if nurtured properly.

Changes adjacent to the District can have impacts to a community often unintended and can be capitalized upon if positioned correctly. Communities/ neighborhoods with shared borders are partners in the vision plan and should be viewed as such. The cohesive integration of any planning impacts all.

The East Gateway has the distinction as an “urban edge” community that is surrounded by major park/open space settings (Glen Oaks Park to the south, Crest Lake Park to the east, and the Clearwater Country Club to the north), with a natural spine in the form of Stevenson Creek. State transportation corridors parallel the northern and southern borders of the District (Drew Street and Court Street) and provide both easy vehicular access as well pedestrian impediments.



## PLANNING PROCESS

Completion of the Memorial Causeway Bridge in 2005 and the re-direction of the traffic patterns have had a large physical impact to the core of the East Gateway community through a lesser presence of the automobile. This can be viewed as a loss of sheer volume of potential economic opportunity from drive-by customers. It also offers the opportunity to readdress the street from a vehicular-dominated corridor to a pedestrian-oriented community.

To understand all the influences to the East Gateway District, we created three tiers of study that included the Greater Clearwater Area, taking into consideration the Downtown Business District, the beaches and their access, as well as the major corridors that feed into the City. We also defined an Extended Study Area bounded by Keene Road, Palmetto Street, Myrtle Avenue and Druid Road that encompasses the periphery of the District and contributes to the essence of the East Gateway District through market, community and proximity. The Study Area, which is the focus of the vision plan, is within the boundaries of Drew Street to the north; Missouri Ave to the west; Court Street to the south and Highland Avenue to the east.

### DATA GATHERING

#### Existing Data

Various studies, maps and demographics were a part of the holistic image we assembled to give the planning team a sense of history and a starting point for moving forward.

Recognizing both the needs and the potential of the District, in 2002 the CRA initiated a **Findings and Declaration of Necessity Analysis** ("slum and blight" study) for the District, which was officially designated as a redevelopment area in 2004.

#### The Clearwater Downtown Redevelopment Plan

(CDRP) was amended to establish a vision for the District, strategies to resolve neighborhood needs, and policies to guide future redevelopment. Although the CDRP is the principle document for the CRA and is focused on the Downtown, these policies can benefit the western edge of the East Gateway District as well as the Cleveland Street and Gulf to Bay corridor.

#### Economic Development Strategic Plan, 2011

The plan outlines the steps for achieving economic development success and guiding principles that reflect the values of the community. As an economic development plan, this plan developed a set of statements expressing how a community defined economic vitality. Based on the research and analysis, this plan was organized around the core goals of pursuing tax base diversification, higher paying jobs, and business vitality. The need for greater tax base diversification and higher wage jobs is fully supported by the data. Business vitality refers to the city and its economic development partners taking a more active role in helping existing businesses expand and new enterprises form. The guiding principles were recognized as a challenge that can only become a reality if goals are established as pillars to support key proposals.

# PLANNING PROCESS

## Downtown Clearwater Market Study, 2005

As the basis for evaluating the market potentials and opportunities for investment in Downtown Clearwater, Lambert Advisory examined demographic, economic, and real estate market trends and forecasts for several geographic areas (in descending order of geographic size): the Tampa Bay Area, Pinellas County, City of Clearwater, the CRA, and the Downtown retail trade area. The Tampa Bay area, Pinellas County, and the City of Clearwater are profiled to provide economic context for the narrower Downtown retail trade area and the CRA, as well as discuss the Downtown's existing and potential "capture" of economic activity that occurs at the broader geographic area (for example, the proportion of office space in Pinellas County, based on County employment projections, that can be leased in Downtown office buildings).

## East Gateway District Five-Year Action Program, 2008

Given that the area experienced public and private disinvestment, the City/CRA committed resources to stabilize the District. As a result, the East Gateway District Five-Year Action Program for Fiscal Years 2007/08-2011/12 was developed and approved in 2008, setting forth a series of actions to help restore vitality and livability to the area and better integrate local Hispanic residents and businesses into the community.

The four overarching goals of the Five-Year Action Program are:

- Engage residents, businesses and other neighborhood interests in the creation and implementation of the action program;
- Achieve neighborhood stability by addressing the social, economic and physical issues that plague the area;
- Establish a unique and positive identity that instills neighborhood pride and sense of ownership; and
- Revitalize the neighborhood to attract reinvestment in private property.

In 2008, faced with continuing neighborhood issues and prospects for positive change through a newly approved Five-Year Action Program, residents, business owners and impacted individuals from adjacent neighborhoods organized under two community groups to advocate for Action Program implementation. These involved stakeholders have expressed general support for redevelopment and other infrastructure investments (such as streetscaping) in the District but are concerned that the *East Gateway District Vision and Land Use Plan/Redevelopment Plan* in the Downtown Redevelopment Plan does not reflect community preferences and might not provide for optimal build-out of this downtown district.

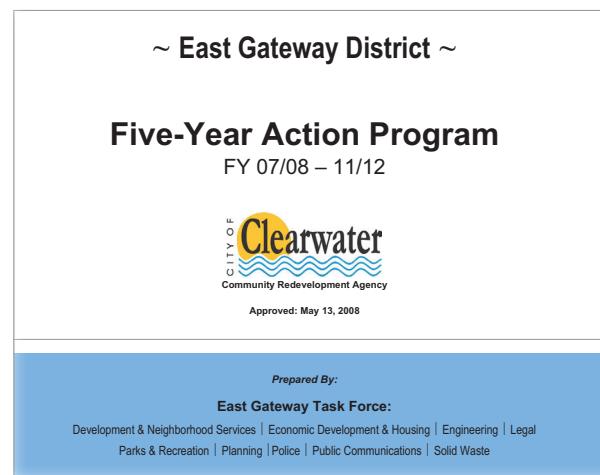
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## PLANNING PROCESS

### Market-Based Research

Working in close partnership with community and corporate leaders over the past decade and a half, Social Compact has pioneered the “DrillDown,” a methodology to analyze inner-city markets and create accurate, business-oriented profiles of “emerging” neighborhood markets. The DrillDown combines numerous data sets, public and private, national and local, in order to build a set of up-to-date community economic indicators tailored to urban markets. These indicators describe the size (population), strength (income and buying power), stability (homeownership and residential investment) and investment opportunity of a given market more accurately than traditionally used datasets.

DrillDown™ profiles combine Social Compact’s many innovative economic and demographic methodologies into a powerful information package unique in scope, breadth and accuracy compared with conventional inner-city economic analyses. These profiles unearth new and previously overlooked investment and development opportunities in underserved urban areas. DrillDown™ profiles have consistently found inner-city communities to be larger, safer and with



far greater buying power than indicated by standard market information sources.

The *DrillDown PAD™* combines demographic and economic profiles with real estate market analytics to provide a robust analysis of both the demographic, economic and land characteristics of a location. The *DrillDown PAD™* utilizes PopStats, a product of Synergos Technologies, as the basis for establishing the demographic & economic profiles. PopStats data

uses an estimation approach that corrects for errors in traditional methodologies and places detailed attention to elevating the accuracy of the estimates themselves. The bottom-up approach is based on the existing relationship between Census household counts and postal delivery counts at the ZIP+4 level to generate the most unbiased estimates possible. A series of checks-and-balances are used to validate estimate results and ensure accuracy. Traditional market data sources are supported by local primary data in the real estate market analysis to understand development activity, trends and opportunities.

The proposed project plan aims to reveal market strengths and opportunities commonly overlooked by traditional market analyses. With adequate, accurate information, the proposed market analysis can assist Clearwater and other local stakeholders to leverage neighborhood assets to attract investment, creating safe and healthy neighborhoods in which to live and do business.

# 4



## MARKET/ECONOMIC ANALYSIS



## **MARKET/ECONOMIC ANALYSIS**

In recent years, inner-city neighborhoods have come to represent billions of dollars in untapped buying power and retail leakage. The ethnic and cultural diversity of urban residents represents myriad opportunities for local entrepreneurs, niche markets and new markets for financial service providers, corporate retailers and other commercial investors. Despite this opportunity, barriers to private investment in underserved neighborhoods persist. As a result, urban residents lack access to basic goods and services at competitive prices, and retailers and developers are unable to capitalize on the fundamental assets of inner-city, urban communities.

Underserved urban neighborhoods are often negatively stereotyped and defined by deficiencies rather than strengths. The reason for this is manifold. First, deficiency-based depictions are necessitated by funding and policy regulations that require a neighborhood to demonstrate need for federal subsidies and social service programs. While these depictions attest to social need, they do little to highlight neighborhood strengths and economic opportunity. Second, excessive media coverage of undesirable characteristics, such as crime, poverty, and blight, perpetuate negative perceptions of these inner-city neighborhoods. Finally, lack of dependable business-oriented data on underserved communities expands the information gap on market trends, disabling potential investors from making informed decisions. Combined, these factors contribute to a cycle of missed opportunities in underserved urban markets.

### **SUMMARY**

This market analysis of the East Gateway District of Clearwater indicates that the area has all of the components to become a more livable community, a neighborhood where residents can work, live and access most of the services and businesses they need. The District is at a transformative point to change the trajectory of the economy and improve quality of life for current and future residents and businesses.

Following are some key findings:

- The population projections indicate a stable growth of about 2-3% trend in the next 5 and 10 years, even though both study areas and the City have lost some population during the last 10 years.
- The density of the East Gateway is twice that of the City and the Extended Study Area. Characteristic of dense communities, the District is diverse with significant Hispanic and Black populations. Capitalizing on the diversity

- of the area, there are opportunities to focus on culturally-specific businesses.
- The Study Area outpaces the city as a whole and the surrounding neighborhoods in the number of children and youth. This points to a direction in which the retail mix of the East Gateway can be augmented to further support the greater community. The above strategy should focus on national retailers and franchise opportunities, as well as entrepreneurial opportunities for existing businesses and residents.
- The income density per square mile of the East Gateway is greater than that of the City and the suburbs, which positions it on par with them to attract retail.
- The existing housing stock is affordable, which contributes to its higher absorption rate of about seven months than neighboring areas with higher-priced homes.

- The Study Area has four grocers with less than 8% of the population considered to be underserved. This study does not evaluate the quality of the grocers, so there may be opportunities to improve the merchandise mix to support the diverse community and/or quality of food.
- The lack of significant retail, grocery and restaurant leakage in the Study Area and Extended Study Area suggests that these are destination areas where people from the “outside” come to shop and eat. This is a strength that should be built on. Further improvements in the retail mix that can support a more walkable environment and attract a larger share of the market, instead of being supported by residents alone, are opportunities. Specifically, the significant visitor population brings over \$1 billion dollars into the greater Clearwater/St. Petersburg area. A focused strategy to brand the East Gateway with unique shops could be a way to attract portion of that income to this area.

- The East Gateway District is home to many entrepreneurs, with 81% of the 201 businesses comprised of micro-businesses employing 0-5 employees. Total revenues are estimated at \$195 million for the East Gateway District, which employs 1,449 people.

### **Recommendations**

The *PAD*<sup>TM</sup> has produced the following principal conclusions/recommendations:

- Focus economic development efforts on increasing the density of the District and establish affordable housing opportunities for people that work and study in the area. The *PAD*<sup>TM</sup> revealed that population density in the East Gateway District translated into concentrated buying power that superseded City figures, even though average household income was comparatively lower. The City should consider options for increasing the Extended Study Area's market size (population and households). These housing developments can be set up as mixed- and multi-use apartment buildings where the first floor can

be planned for retail businesses, the second floor for office spaces (ideally for doctors that can then provide internships to UMA students) and the rest of the development can be geared towards housing.

- Support businesses that will most likely make the area a walkable destination area. Examples of such businesses that are essential to the business mix of the East Gateway District are businesses that generate more frequent traffic (i.e. places that require two visits rather than one, such as dry cleaners for the clothes drop off and pick up), restaurants (particularly ones focusing on unique cuisines and local flavors), and businesses geared towards activities of visitors and residents (i.e. pottery stores that have children classes or coffee shops with wireless internet for UMA students). When thinking about retailers, it is important to note that in the Extended Study Area the retail categories where residents spend most money (other than groceries) are apparel, housekeeping supplies, personal care and restaurants, suggesting that businesses or retailers that have

unique housing supplies, as well as maybe spas or personal care services geared towards the needs of tourists and beach living are likely to do well.

- Capture the additional revenue generated by the increased visitors to the area and their increased expenditures since last year. The study found that there has been a significant increase in the number of visitors to the Clearwater/St. Petersburg area. This is translated to an increase of \$95 million in the past eight months (Jan-Aug 2011). Establishing businesses to attract visitors spending will help to generate new jobs and viable businesses in the area.
- Attract local, unique apparel shops. The market analysis for the East Gateway Community and the Extended Study Area suggests that, given the current residential population, these areas are sufficiently served with financial services, groceries, and retail/restaurant providers. Nonetheless, there is a very small apparel leakage that could potentially support 5,500 square feet of this type of retail. Given the large presence of

national outlet stores in nearby cities and surrounding areas, Social Compact suggests focusing on local, unique apparel shops, ideally a combination of stores geared towards city residents and tourists' needs and wants.

- Consider FrankCrum and UMA as anchor institutions. These organizations have a vested interest in the community and its development. Establishing co-op businesses ready to provide services that are currently used by the anchor institutions but obtained far away will help to generate new jobs and viable businesses in the area while servicing local stakeholders.

#### **BRIDGING THE INFORMATION GAP**

Beginning with the premise that a significant reason for inner-city disinvestment is lack of good market information, Social Compact developed the *Progressive Analytics for Development (PAD)*™ to address key barriers to private investment in and around inner-city neighborhoods.

The *Progressive Analytics for Development (PAD)*<sup>™</sup> combines demographic and economic profiles with real estate market analytics to provide a robust analysis of both the demographic, economic and land characteristics of a location. The *PAD*<sup>™</sup> utilizes PopStats, a product of Synergos Technologies, as the basis for establishing the demographic & economic profiles. PopStats data uses an estimation approach that corrects for errors in traditional methodologies and places detailed attention to elevating the accuracy of the estimates themselves. The bottom-up approach is based on the existing relationship between Census household counts and postal delivery counts at the ZIP+4 level to generate the most unbiased estimates possible. A series of checks-and-balances is used to validate estimate results and ensure accuracy. Traditional market data sources are supported by public transactional data in the real estate market analysis to understand development activity, trends and opportunities. Furthermore, the *PAD*<sup>™</sup> incorporates INFOUSA and AC Nielsen data for the business assessment and Economic Modeling Specialist Inc. (EMSI) data to understand the labor market, as well

as Clearwater Police Department records to understand local safety and security conditions.

*The PAD*<sup>™</sup> fills in the economic and demographic blanks that investors struggle to understand and often dispels negative stereotypes perpetuated by misinformation.

The *PAD*<sup>™</sup> data will also be accessible through Social Compact's CityDNA<sup>™</sup> – an interactive online mapping and data platform designed to host data and serve as a powerful open access tool that will allow different stakeholders to access and visualize all available data at the neighborhood, zip code, and City level.

The *PAD*<sup>™</sup> is meant as a tool for local governments, community organizations and businesses looking to attract investment or to invest in inner cities.

The East Gateway *PAD*<sup>™</sup> provides information for the City of Clearwater<sup>1</sup>, the East Gateway District and the Extended Study Area<sup>2</sup>. The street boundaries for the East Gateway District are Drew

Street to the north, Court Street to the south, Highland Avenue to the east and Missouri Avenue to the west. The street boundaries for the Extended Study Area are Palmetto Street to the north, Druid Road to the south, Keene Road to the east and Myrtle Avenue to the west (see Map 1, page 26)<sup>3</sup>.

<sup>1</sup> For the purpose of the *PAD*<sup>™</sup>, the City of Clearwater includes the City and the Enclaves (see Map 2, page 27). Furthermore, all area definitions are subject to block group boundaries and do not perfectly match street boundaries. The 2011 East Gateway *PAD*<sup>™</sup> uses 2000 Census block group boundaries.

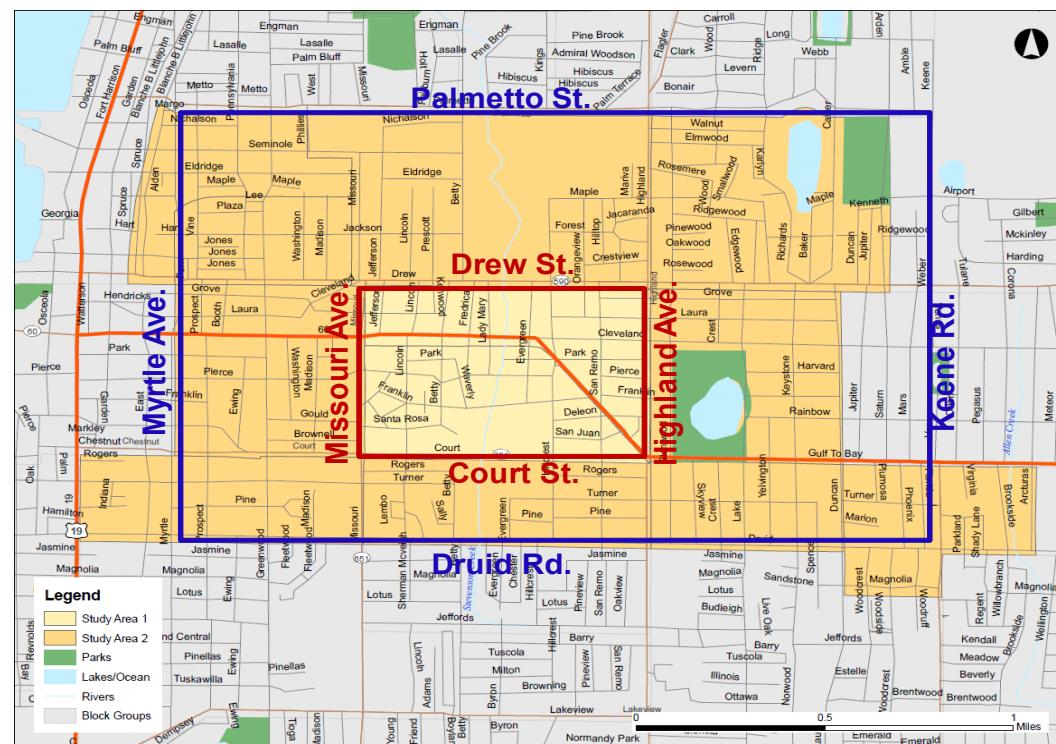
<sup>2</sup> In some instances, information about other geographies will also be provided.

<sup>3</sup> All area definitions are subject to block group boundaries and do not perfectly match street boundaries. The 2011 East Gateway *PAD*<sup>™</sup> uses 2000 Census block group boundaries.

## MARKET SIZE AND DEMOGRAPHICS

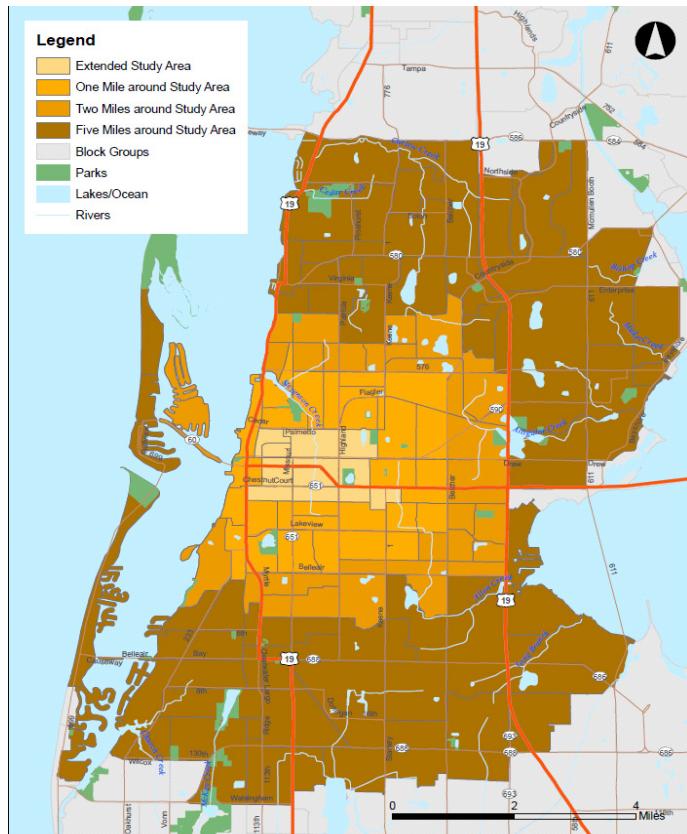
Market size figures indicate a neighborhood's population of residential consumers, effectively describing neighborhood mass and density. Market size is commonly underestimated in inner-city neighborhoods because measurements at the neighborhood level are often outdated or inaccurate. Research has shown that the decennial census is susceptible to undercounting particular areas due to incorrect information, unreturned and incomplete surveys, and missed households and individuals. Population undercounts are more likely to occur in low-income, predominantly minority, urban neighborhoods, where a larger proportion of residents may have language barriers, live in overcrowded housing, and have greater mistrust of government. Accurate measurements of market size underpin assessments of investment and business potential in neighborhoods.

**Map 1. East Gateway District and Extended Study Area**



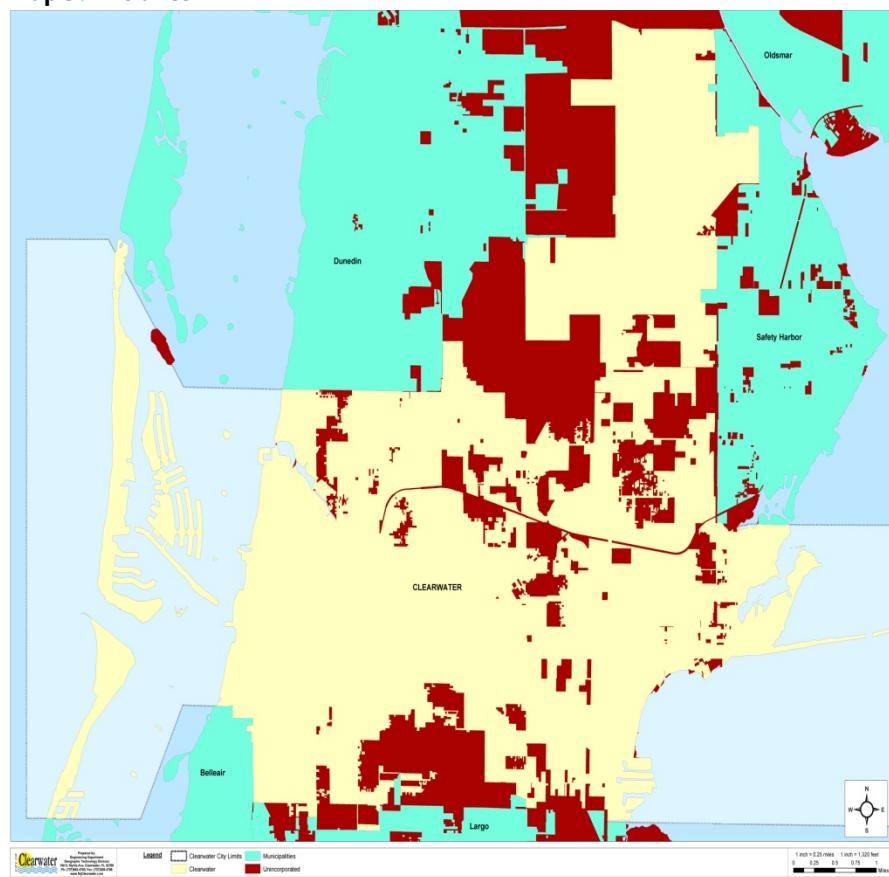
Source: Social Compact, Census 2000 TIGER/Line Files

**Map 2. All Trade Areas**



Source: Social Compact, Census 2000 TIGER/Line Files

**Map 3. Enclaves**



### Population Data

In 2010, population in the City of Clearwater, including the Enclaves<sup>4</sup>, is estimated at 132,645 people and 60,195 households, a small decrease (2%) from 2000 numbers (135,214 people and 61,393 households). Similarly, from 2000 to 2010, there has been a slight decrease in households (-8%) and population size (-2%) in the East Gateway District, also referred to as the Study Area (see Map 4 and Table 1). The Study Area is home to 1,219 households consisting of 2,871 people (2% of the City's population). The Extended Study Area also saw a slight decrease in households from 2000 to 2010 of less than 1%, while population size remained constant during the same time period. The Extended Study Area is home to 4,669 households and 11,703 residents (9% of the City's population).

While the population density in the Study Area is about 7,534 persons per square mile, the densities in the Extended Study Area, the City and the trade areas are about 4,000 persons per square mile.

**Map 4 – East Gateway Study Area**



**Table 1. Population and Households 2010**

Neighborhood	Population	Households
Study area	2,871	1,219
Extended study area	11,703	4,669
City of Clearwater	132,645	60,195
Trade Area (1 mile)	46,551	19,343
Trade area (2 miles)	92,017	40,335
Trade area (5 miles)	285,767	131,957

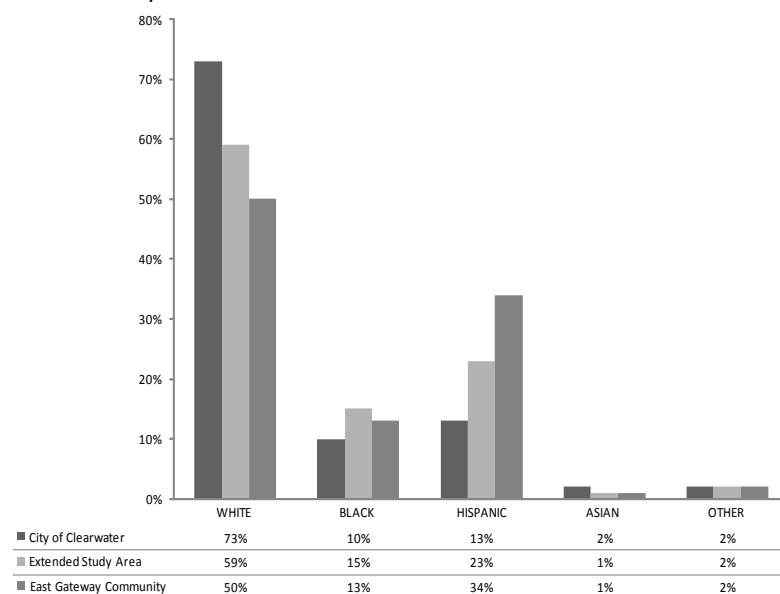
Source: Social Compact, PopStats 2010

In a community like Clearwater where there is a concentration of businesses and natural features that attract tourists, one must also take into account these two additional groups of consumers in order to better understand market size.

The City of Clearwater is more monolithic than the East Gateway District and the Extended Study Area, with Whites representing the majority of the population (73%), followed by Hispanics (13%) and Blacks (10%). The East Gateway District is the most diverse of the areas under analysis although still predominantly White (50%), followed by Hispanics (34%) and Blacks (13%). The Extended Study Area shows the same patterns, however, the presence of the White population (59%) is higher and that of the Hispanic (23%) and the Black population (15%) is much more limited when compared to the East Gateway District (see Chart 1, page 29).

<sup>4</sup> The City of Clearwater does not have a continuous city boundary. However, for the purpose of this study, a continuous city boundary is drawn that includes the Enclaves. The Enclaves are the non-city areas located within the City boundary and they do not match with the block group boundaries (see Map 3, page 27).

Chart 1. Ethnic Composition



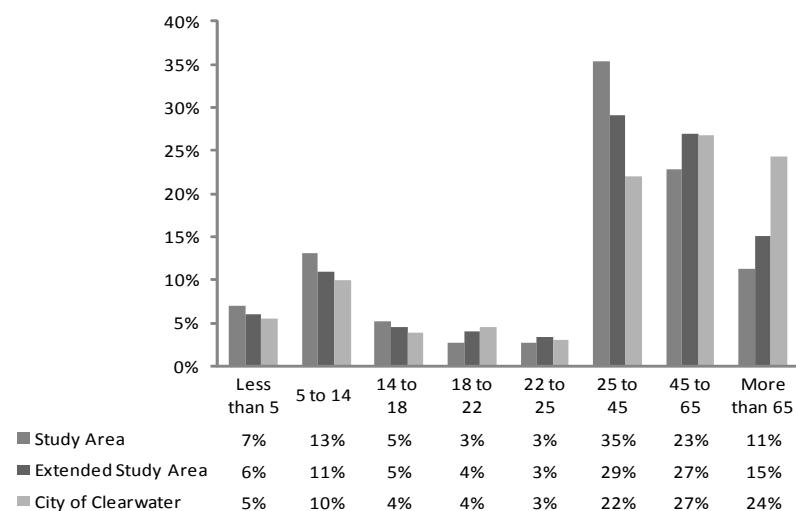
Children comprise the second largest group in the Study Area, which points to opportunities in the types of businesses that support that population. In the City of Clearwater there are a total of 7,254 children under the age of 5 (5% of the City's population). An estimated 698 of these children live in the Extended Study Area, comprising 6% of the Extended Study Area's population.

The proportion of people ages 18 to 22, 22 to 25, and 45 to 65 in the City of Clearwater and the Extended Study Area is identical (see Chart 2, page 30). The big differences regarding age composition in these two geographies are apparent with people aged 25 to 45 (22% of the City's population compared to 29% of the Extended Study Area's population) and people 65 years and older (24% of the City's population compared to 15% of

the Extended Study Area's population). This data suggests that the Extended Study Area is home to an overall younger population.

A large portion of the population in the two study areas has working-age residents, while the suburbs are home to the 60-plus aged population. Also, the two focus areas outpaced the suburbs in the number of children and teenagers. The 18-25 age cohort may indicate future demand for certain types of housing product (e.g., rental) and retail/entertainment geared toward newly created households. The high percentages of 45-65 age group in its peak earnings may indicate future demand for differentiated retail and housing products.

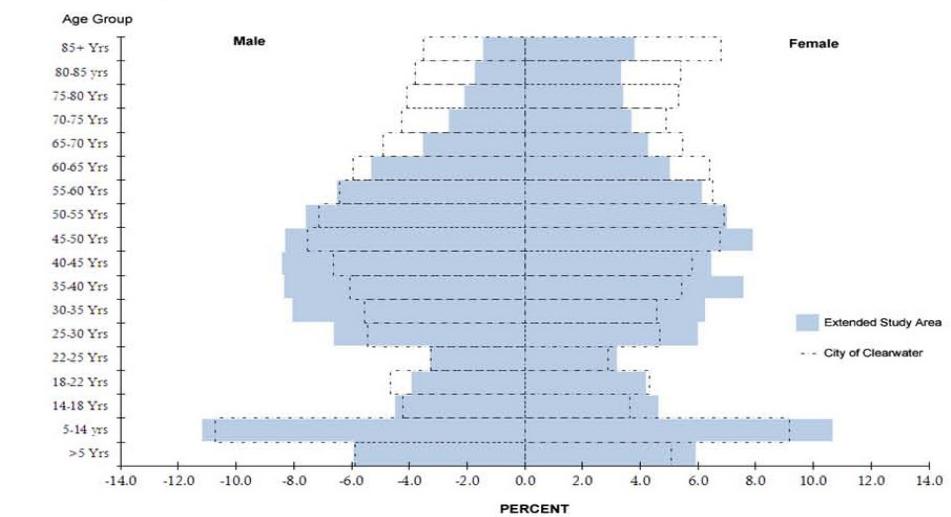
The female-to-male ratio in the City is about 100:91 while the national ratio is at 100:97. However, the Extended Study Area has a ratio of 100:104. The female-to-male ratio and the Age-Sex pyramid indicate that the Extended Study Area is working-male-dominated and signify future demand for

**Chart 2. Age Composition**

Source: Social Compact, PopStats 2010

businesses and services targeting working-age men (see Chart 3).

In addition to natural increase (birth rate outpacing death rate), migration is a key driver of population growth. Migration in this study is defined as

**Chart 3. Age-Sex Pyramid**

Source: Social Compact, PopStats 2010

population movement between the City of Clearwater and other locations within the United States. There are two components of net migration: in-migrants that move into the city and out-migrants who move to other cities and/or states.

Florida has historically attracted large numbers of migrants, particularly retirees, from Northeastern and Midwestern states. The west coast of Florida has historically attracted the highest numbers of in-migrants from Midwestern States (Downtown Clearwater Market Study, 2005). The Downtown

Clearwater Market Study conducted by Lambert Advisory in August 2005 found that the net migration for Pinellas County was highest among any of the south Florida counties. However, the most recent demographics for the study areas and the trade areas show that, with the exception of the 5-mile trade area (0.08%), they all lost their population to other areas. Per Table 2, the net migration in the past 12 months is more severe in the two study areas (-2.58% in the Study Area and -4.79% in the Extended Study Area).

**Table 2: Net Migrations in the past 12 months (2010)**

NHOOD	Year (2000-2010)	Year (2010-2015)	Year (2015-2020)
Study Area	-2.58%	0.77%	1.56%
Extended Study Area	-4.79%	1.59%	1.93%
City of Clearwater	-0.72%	3.05%	2.84%
Trade Area (1 mile)	-0.75%	2.27%	2.38%
Trade Area (2 miles)	-0.77%	3.07%	2.81%
Trade Area (5 miles)	0.08%	3.28%	2.98%

Source: Social Compact, PopStats 2010

The relatively higher rate of out-migration in the Extended Study Area suggests that residents are moving from the central city to the suburbs and other parts of the county.

Although both focus areas and the city have lost their population during the last 10 years, the population projections indicate a positive growth trend in the next 5 and 10 years (see Table 3 and Chart 4). The City is expected to grow at about 3.0% in the next five years and about 2.8% in the next 10 years. The projected growth rate in the two focus areas is under 2%.

**Table 3. Population Projections**

NHOOD	Year (2000-2010)	Year (2010-2015)	Year (2015-2020)
Study area	-2.41%	0.77%	1.56%
Extended study area	-0.12%	1.59%	1.93%
City of Clearwater	-1.90%	3.05%	2.84%
Trade area (1 mile)	-2.15%	2.27%	2.38%
Trade area (2 miles)	-1.16%	3.07%	2.81%
Trade area (5 miles)	-0.82%	3.28%	2.98%

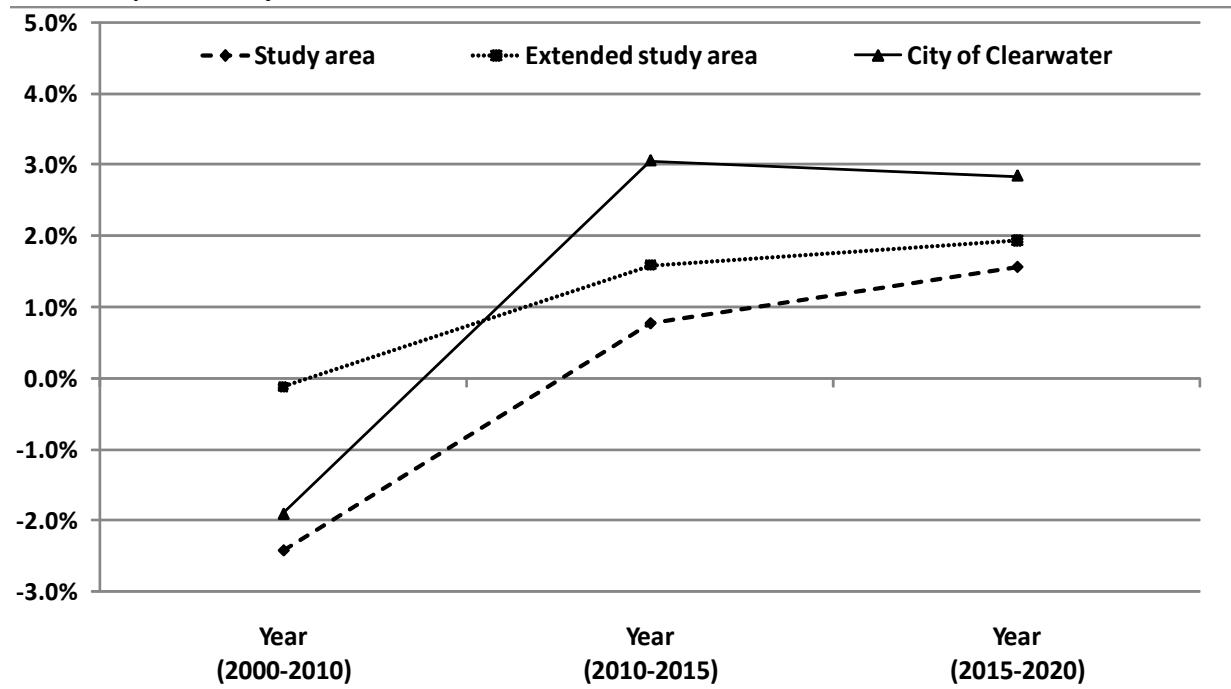
Source: Social Compact, PopStats 2010

### MARKET STRENGTH/BUYING POWER

Market strength and buying power figures address the population's consumer potential, gauging purchasing power by estimating aggregate income and income density. Higher population density in inner-city neighborhoods translates into concentrated buying power that supersedes their suburban counterparts, even in cases where average household incomes are comparatively lower. Accurate measurements of a community's economic activity may attract new investment and assist policy makers in identifying those barriers that prevent small and medium enterprises from entering the formal market.

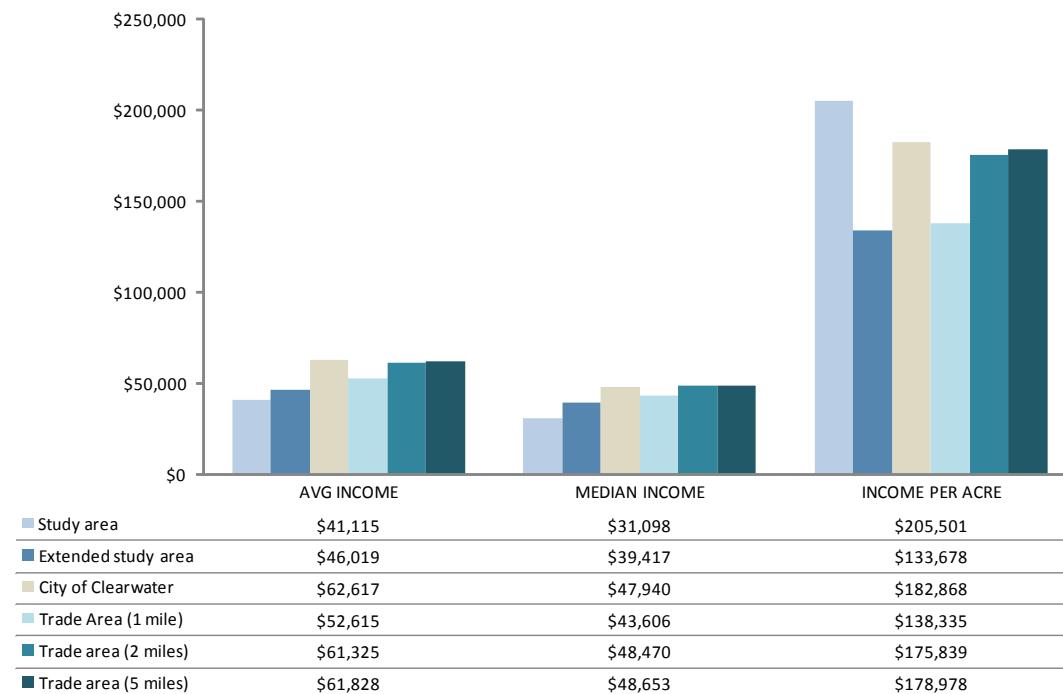
Average and median household income in the East Gateway District and the Extended Study Area is lower than the City of Clearwater's estimates. However, due to high population density in the East Gateway District, income per acre (\$205,501) is higher than that of the City of Clearwater and Extended Study Area estimates, (\$182,868 per acre and \$133,678 per acre respectively).

**Chart 4. Population Projections**



Source: Social Compact, PopStats 2010

Average household income in the East Gateway District (\$41,115) is slightly less than the Extended Study Area's estimate (\$46,019), but a much smaller amount than the City of Clearwater's (\$62,617). Average household income in the East Gateway District has increased by 23% compared to 2000 Census figures. Similarly, average household income in the Extended Study Area and the City of Clearwater have increased respectively by 26%, compared to 2000 Census figures. Median household incomes, estimated at \$31,098 (East Gateway District), \$39,417 (Extended Study Area), and \$47,940 (City of Clearwater) show a respective increase of 21%, 25% and 27% compared to 2000 Census numbers (see Chart 5).

**Chart 5. Incomes**

Source: Social Compact, PopStats 2010

The income of new homebuyers is an indicator of the changes that are happening in an area, as it reveals information regarding the purchasing power of new area residents. The average income of new home buyers in the East Gateway District, Extended Study Area and the City of Clearwater reached its peak in 2007. In the Extended Study Area, the average income of new homebuyers in 2007 was estimated at \$79,293 or 117% above 2000 Census figures, while in 2009 the average income of new homebuyers was estimated at about the same as 2010 average income, \$46,280. In the City of Clearwater, the average income of new homebuyers in 2009 is significantly higher, estimated at \$93,770 or 88% higher than the 2010 average household income estimate (see Chart 6).

**Chart 6. Income of New Home Buyers\***



\* 2010 Home Mortgage Disclosure Act data is not available at this time

Source: Social Compact, HMDA 2009

Table 4 includes visitors to the Clearwater/St. Petersburg area that visited the downtown area, the beaches (including hotel visitors, day trippers, people visiting friends and relatives, and business visitors), as well as institutional visitors (including visitors to the City, County, religious institutions, and Morton Plant Hospital). Starting January until August of this year (2011), the Clearwater/St. Petersburg area had about 3.9 million visitors. This number includes both those who stayed in hotels, motels, condos and campgrounds, as well as those who stayed at friend/relative homes. This represents a 3.5% increase compared to those that visited the previous year.

**Table 4. Visitors in Clearwater/ St. Petersburg (in Thousands)**

	(Jan-Aug) 2010	(Jan-Aug) 2011	Percent Change 2010-2011
H/M/C/C Visitors*	1,912.1	2,022.9	5.79%
V F/R**	1,877.2	1,897.5	1.08%
Total Visitors	3,789.3	3,920.4	3.46%

\* Visitors who stayed at Hotels, Motels, Condos or Camp Grounds

\*\* Visitors who stayed with relatives and friends

Source: Social Compact, Pinellas County Tourist Development Council

Although there has been an overall increase in the number of visitors to the area, a survey conducted by Research Data Services revealed that there was a 2.5% decrease in the number of first-time visitors to the Clearwater/St. Petersburg area. With the proximity to Orlando's International airport, the visitors to the area were mostly day-trippers who stayed the night in Orlando.

The expenditure demand estimate is based on number of visitors and their average spending from Research Data Services from the St.

Petersburg/Clearwater Area Convention & Visitors Bureau. The capture rates increased from 2005 to 2010. Dividing the potential gross spending figures by annual sales per square foot estimates yields the square footage implied by visitor demand for retail – approximately 27,000 square feet total in 2005 and 66,000 square feet total in 2010, approximately 4% and 8% of total retail space, respectively.

**Table 5. Visitor Expenditures in Clearwater/ St. Petersburg (in Millions)**

	(Jan-Aug) 2010	(Jan-Aug) 2011	Percent Change 2010-2011
H/M/C/C Exp.	1,424.5	1,548.7	8.72%
V F/R Exp.	988.4	1,006.0	1.78%
Total Exp.	2,412.9	2,554.7	5.88%

Source: Social Compact, Pinellas County Tourist Development Council 2010-2011

Average per person expenditure of the visitors who stayed at hotels, motels, condos, or campgrounds (\$766) was about 44% higher than that of the visitors who stayed with relatives and friends (\$530).

The total visitor expenditure was about \$142 million (5.9%) higher than last year's visitor expenditure in the Clearwater/St. Petersburg area.

Increase in visitors who stayed at hotels, motels, condos, or campgrounds resulted in a 5% increase in the total 'room nights'.

The Clearwater/ St. Petersburg area continues to attract more visitors to the region. About 5.79% more visitors stayed either in hotels, motels condos or campgrounds in the Clearwater/St. Petersburg area since January 2011 (see Table 4, page 35). Additionally, each visitor spent an additional 8.72% during his/her stay, which translated to about \$95.6 million (see Table 5, page 35).

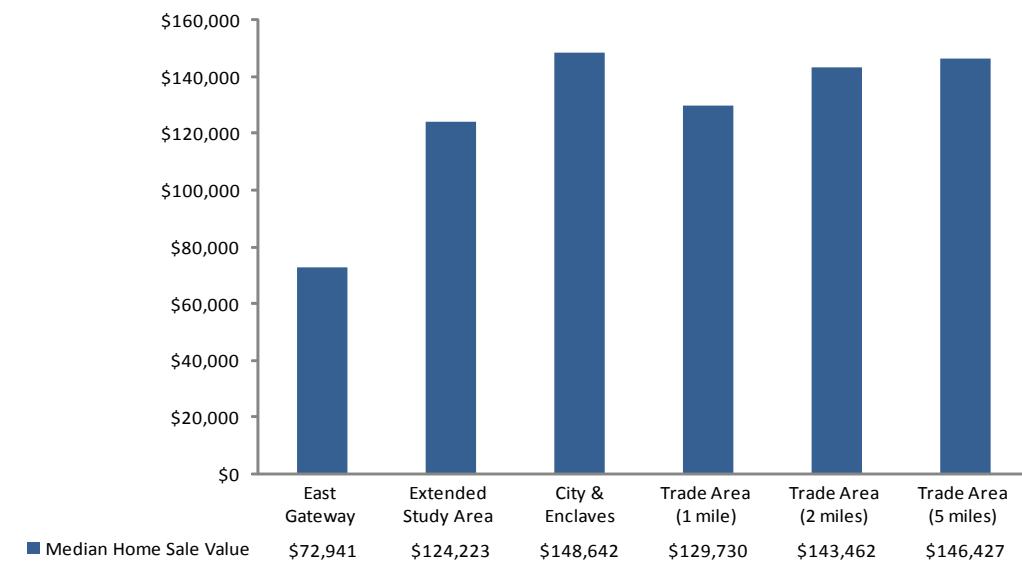
### MARKET STABILITY AND RISK

Market Stability indicators further gauge the viability of business investment in a neighborhood by assessing the presence of community stakeholders and demonstrating trends in real estate property values, housing investments and safety.

### Real Estate Data

Per Chart 7, median home sale values are significantly higher in the City of Clearwater (\$148,642) when compared to the Extended Study Area (\$124,223) and the East Gateway District (\$72,941).

**Chart 7. Median Home Sale Values**



Source: Social Compact, HMDA 2009

In addition to observing home values, the PAD™ analyzed real estate absorption rates (the rate at which the inventory of homes is sold) for the City of Clearwater in order to understand current and future market conditions. This figure helps to assess how long it will take to sell a home and how aggressive a seller should be to reach a timing goal to sell his/her home. In other words, it is the number of months that the market will need to exhaust the current supply of homes for the foreseeable future. For instance, an absorption rate of 8 means that, if the market stays as it is, the real estate market has all the homes for sale that it needs for the next 8 months. The rate is simply calculated by measuring the number of sales in a time period (i.e. 1 month, 1 week) by the number of active listings. In general terms, the real estate community considers that an area with 1 to 4 months supply of homes is a sellers' market, an area with 5 to 6 months supply of homes is a neutral market, and an area with more than 6 months supply of homes is a buyers' market.

These distinctions are important because in a sellers' market, the seller can set the price while in a buyers' market the seller will need to offer the buyer incentives (i.e. home warranties).

Absorption rate tells how long it takes to sell the present for-sale housing inventory. In the City of Clearwater, the overall absorption rate is estimated at 7.67 (about 8 months, in other words), which is considered a buyers' market. When looking at properties of different values, it is apparent that more expensive homes have poor absorption rates. For instance, for homes priced between \$250,000 and \$500,000, the absorption rate is estimated at 10.35 months.

For homes priced over \$500,000 but less than \$1 million, the absorption time is about 18 months. It would take more than three years to sell those homes priced over \$1 million. For homes of all values, the City of Clearwater is a buyers' market (see Table 6).

The City of Clearwater is home to all income groups. This is evident from the number of active rental listings on Realtor.com. About 24% of the total rental listings are priced under \$800 and about 19% of the listings are over market, \$2,000.

**Table 6. Absorption Rates\***

Price Range	Active Listings	Sales in the past 6 months	Sales per month	Absorption Rate
\$10,000 - \$100,000	669	629	104.8	6.38
\$100,000 - \$250,000	533	444	74.0	7.20
\$250,000 - \$500,000	219	127	21.2	10.35
\$500,000 - \$1,000,000	116	40	6.7	17.40
> \$1,000,000	59	9	1.5	39.33
Total	1,596	1,249	208.2	7.67

\* Absorption rates calculated based on home sales in the last 6 months

Source: Social Compact, [www.Realtor.com](http://www.Realtor.com) (Mar.-Sep.) 2011

## Housing Investments

New residential constructions and rehabilitations (additions, alterations, and repairs) are important indicators of residential investments in a community.

Using the City's building permit data<sup>5</sup>, the PAD™ compared investments made citywide with those made in the Extended Study Area. Using building activity over time (from October 1, 2005 through September 30, 2010) one of the goals was to capture trends in residential construction and renovation (the presence of upward trends would be indicative of a vibrant housing market).

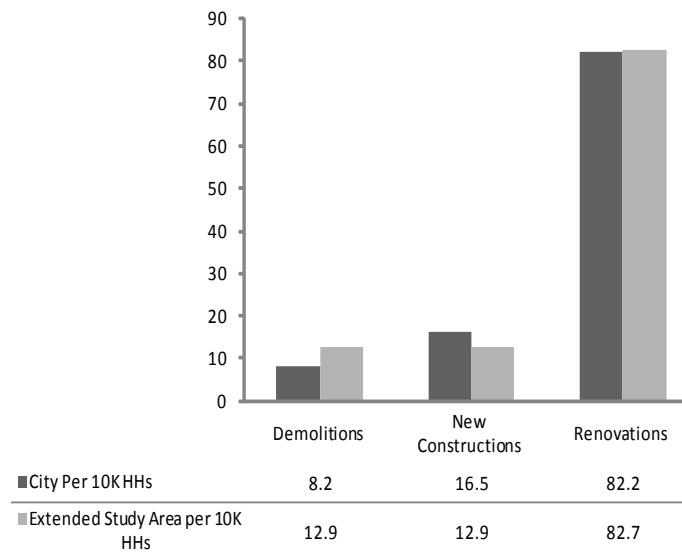
The number of demolitions, new constructions, and renovations per 10,000 households between October 1, 2005 and September 30, 2010 revealed the following findings (see Chart 8):

- There were, proportionally, more demolitions in the Extended Study Area (12.9 per 10,000 households) than in the city (8.2 per 10,000 households);

- There were, proportionally, more new constructions in the City of Clearwater (16.5 per 10,000 households) than in the Extended Study Area (12.9 per 10,000 households); and

- The number of renovations was, proportionally, the same in the City of Clearwater (82.2 per 10,000 households) and the Extended Study Area (82.7).

**Chart 8. Demolitions, New Construction and Renovations per 10,000 households**



Source: Social Compact, City of Clearwater's Building Permits 2005-2010

Looking at the building permit data that has information for the entire fiscal year (2005, 2006, 2007, 2008, 2009 and 2010), a downward trend in residential new constructions is evident in both the City of Clearwater and the Extended Study Area. In the City of Clearwater in 2006, there were 327 residential new constructions, compared to 208 in 2007, 133 in 2008, and 38 in 2009. Similarly, in the Extended Study Area, 2006 was the year with the most residential new constructions (34), followed by 15 in 2007, 6 in 2008 and 0 in 2009 (see Table 7, page 39).

<sup>5</sup> Building Permits were provided for the City proper and do not include the Enclaves.

**Table 7. Residential New Construction and Renovations**

RESIDENTIAL NEW CONSTRUCTIONS					
	2005	2006	2007	2008	2009
Clearwater	37	327	208	133	38
Extended	2	34	15	6	0
RESIDENTIAL RENOVATIONS					
	2005	2006	2007	2008	2009
Clearwater	419	1,230	878	510	496
Extended	37	131	89	43	49

Source: Social Compact, City of Clearwater's Building Permits 2005-2010

Similar patterns are observed for the residential renovations with the exception of a 14% increase in the number of renovations in the Extended Study Area in 2009. Per Table 7, in the City of Clearwater, 2006 was the year when more residential renovations took place (1,230) followed by 2007 (878), 2008 (510), and 2009 (496). In the Extended Study Area, the number of renovations decreased by 62% from 131 in 2006 to 49 in 2009.

exacerbating existing stereotypes. The type of crime which is most influential to a retailer is property crime because it is an indication of crime that could directly impact the retailer.

Using data obtained from the Clearwater Police Department records (January 1, 2008 through December 31, 2010), Social Compact employed the Federal Bureau of Investigation's (FBI) Uniform Criminal Report (UCR) coding to define property, community and violent crime<sup>6</sup>.

### Safety

In a national survey, 'crime and perceptions of crime' was identified as the most important factor influencing retailers' decision to locate in an underserved market. 93% of the respondents viewed crime as a significant or very significant factor in their location decisions.

Popular media plays a crucial role in shaping perceptions of inner city neighborhoods by disproportionately reporting incidents of crime and

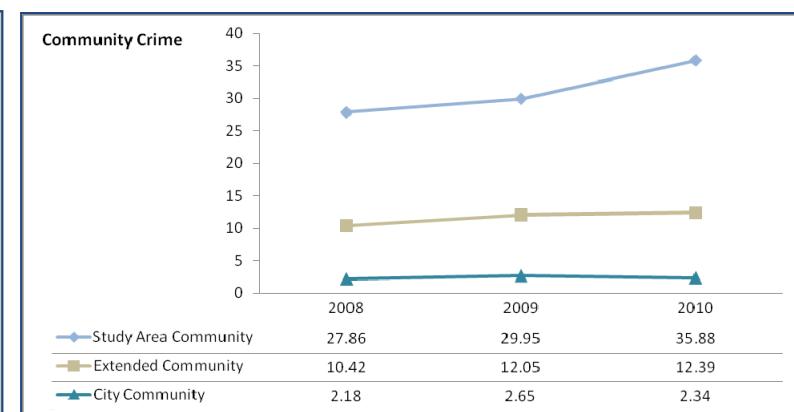
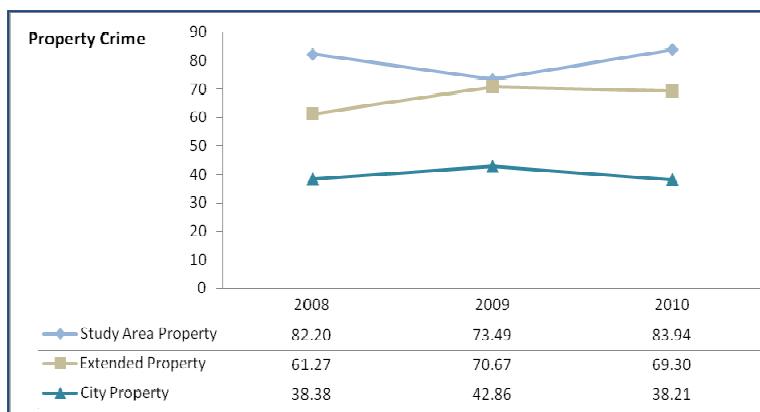
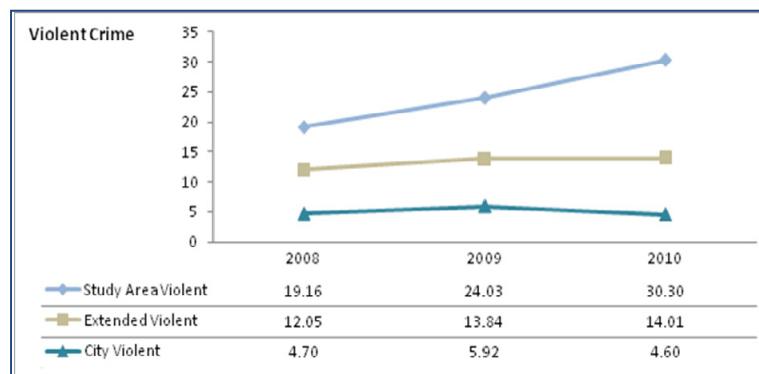
Across the three years, 84% percent of crimes are categorized as property crime, 11% as violent crime and 5% as community crime (see Chart 9, page 40).

Overall, the City did not experience a significant change in crime between 2008 and 2010. Crime within the City fell 12.2% between 2009 and 2010, after experiencing a 13.6% increase between 2008 and 2009. A similar pattern occurred across all three categories of crime for the City of Clearwater.

The Study Area and Extended Study Area experienced an overall increase in the number of reported crimes between 2008 and 2010 (a 16.2% increase in the Study Area and 14.3% in the Extended Study Area). The rise in property crime was less dramatic, with the Study Area experiencing a small 2.1% increase.

Relative to the City, the Study Area and Extended Study Area have a higher incidence of recorded crime per capita in each of the three categories.

<sup>6</sup> Property crime includes reported incidents of arson, burglary, larceny/theft, and motor vehicle theft. In addition, Social Compact designed an indicator, community crime, to assess visible incidents of crime that, although not typically included in many official crime statistics, may be of particular interest to the business community. Community crime includes reported incidents of blighted properties, disorderly conduct, littering, loitering, prostitution, trespassing and vandalism. Violent crime includes reported incidents of murder, forcible rape, robbery, and aggravated assault.

**Chart 9. Safety per 1,000 people**

Source: Social Compact, Clearwater City Police Department Records 2008-2010

Per capita property crimes in the Study Area are just over twice the City rate, with 83.9 property crimes reported per ten thousand residents in 2010. This compares to 69.3 in the Extended Study Area and 38.2 in the City. The disparity in violent crimes is even larger.

#### **MARKET POTENTIAL**

Market potential is characterized by market anomalies, such as high incomes coupled with inadequate financial services and unmet retail demand. While these anomalies may be known intuitively by business leaders in a community, Social Compact's data provides a more accurate foundation for devising business attraction strategies.

Access to traditional financial services and fresh food are essential components of comprehensive community development, yet many mainstream financial institutions and supermarkets tend not to invest in the inner city as they are largely unaware of the economic potential. As a result, many inner city neighborhoods have fewer traditional financial

institutions and grocery stores per capita when compared to suburban neighborhoods.

#### **Access to Financial Services**

The PAD™ provides information on the presence of traditional financial institutions, such as banks and credit unions, to determine the degree of financial service access within the community. These measures are compared with indicators of nontraditional financial services, such as check cashiers and payday lenders. The measurement of institutions per 10,000 households is used simply to provide a frame of reference for understanding this indicator and should not be interpreted as a measurement of industry patterns.

Access to financial services is significantly better in the Extended Study Area and the East Gateway District in comparison to the city. There is 1 traditional financial institution (1 credit union) in the Study Area, 7 traditional financial institutions (5 banks and 2 credit unions) in the Extended Study Area, and 59 traditional financial institutions (54 banks and 5 credit unions) in the City of Clearwater.

Traditional financial institutions in the Extended Study Area represent 12% of traditional financial institutions citywide.

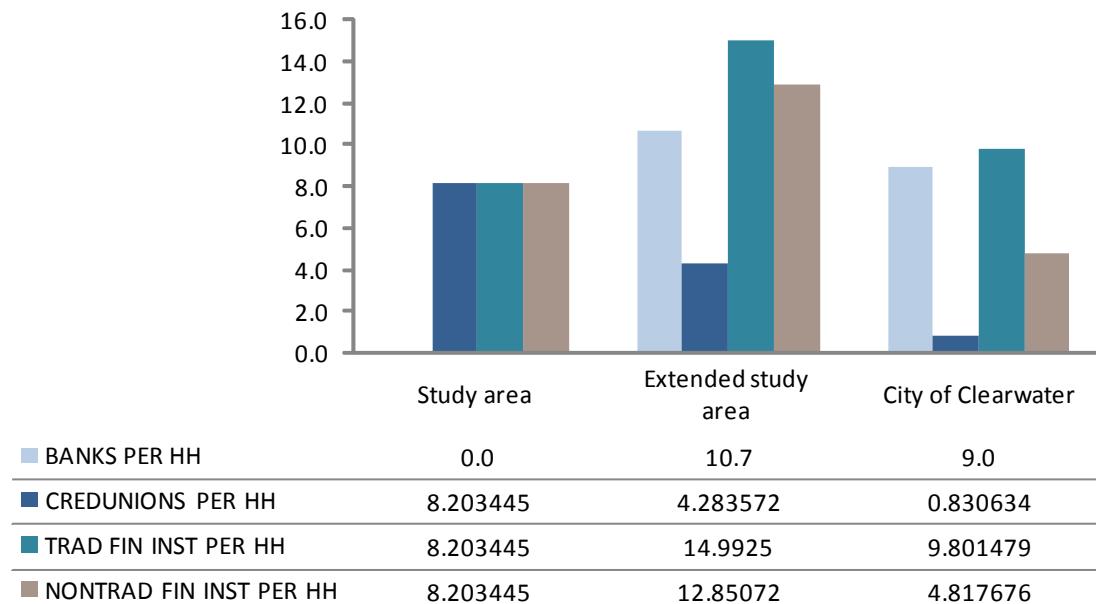
Meanwhile, the East Gateway District is home to 1 nontraditional financial institution<sup>7</sup>, while there are 6 nontraditional financial institutions in the Extended Study Area and 29 in the city.

The presence of nontraditional financial institutions can be one indicator of a population that has limited banking relationships, and may further indicate a sub-set of the population that is loosely connected to the formal economy, or in other words paid under the table through the informal economy. Measuring informal economic activity in neighborhoods through proxies such as nontraditional banking institutions and other indicators or through direct surveys is important to understand the real dollar value that circulates in the community. Further analysis is required to capture the value of informal economy activity in the East Gateway District.

<sup>7</sup> In most instances, the number of nontraditional financial services is an underestimation of the presence of predatory lending institutions as it only includes enterprises that are identified as Payday lenders, check cashers and pawn shops; nonetheless, there are other establishments that provide predatory lending services and are not identified as a business that pertains to one of these categories.

Per Chart 10, in the East Gateway District there are 8.2 traditional and nontraditional financial services for every 10,000 households, while the Extended Study Area and the City of Clearwater are, respectively, home to 15.0 and 9.8 traditional financial institutions and 12.9 and 4.8 nontraditional financial institutions for every 10,000 households.

**Chart 10. Financial Institutions\* per 10,000 Households**



\*A nontraditional financial institution is a predatory lender such as a check cashier or payday lender.  
Credit Unions and Banks are both traditional financial institutions.

Source: Social Compact, FDIC, National Credit Union Administration (NCUA) 2010

On average, East Gateway District residents travel 0.51 miles to the nearest bank, 0.45 miles to the nearest credit union and 0.30 miles to the nearest nontraditional financial institution. Extended Study Area residents travel 0.43 miles to the nearest bank, 0.61 miles to the nearest credit union and 0.29 miles to the nearest nontraditional financial institution. Meanwhile, city residents travel 0.63 miles to the nearest bank, 1.43 miles to the nearest credit union and 0.71 miles to the nearest nontraditional financial institution. In cases when a traditional financial service institution is located on or just beyond area boundaries, this indicator serves as a more accurate determinant of residents' access to these services (see Chart 11).

**Chart 11. Average Distance to Nearest Financial Institution**



Source: Social Compact, FDIC, National Credit Union Administration (NCUA) 2010

### Grocery Access

An absence of affordable, quality food does not necessarily result from lack of market demand and can lead to demonstrable health complications such as obesity, diabetes and hypertension.

Understanding the demand for groceries in communities is essential to development professionals and legislators as many urban areas have begun crafting incentives for grocers to locate in their communities. The PAD™, through the implementation of the Grocery Gap Analysis, quantifies unmet market demand as the difference between grocery store revenue and estimated expenditures. Realizing that one of the full-service grocery stores in the area (Nature's Food Patch) is an organic grocery store and can be interpreted as a specialty kind of grocer, Social Compact implemented the Grocery Gap analysis both with and without Nature's Food Patch included. In both instances, the analysis reveals no grocery leakage, suggesting that the Extended Study Area is a destination area for grocery shoppers outside the Study Area. Extended Study Area and Study Area

residents are found to have adequate grocery store access.

In the Extended Study area, there are 3 full-service grocers, an average of 6.4 full-service grocers per 10,000 households, which provide, on average, 4.06 square feet of grocery retail space per capita (see Table 8). Compared to an industry standard of 3 square feet per person, Extended Study Area residents are well-served regarding groceries. When taking out Nature's Food Patch, the number of full-service grocers in the Extended Study Area is reduced to 2, which amounts to 4.28 full-service grocers per 10,000 households that provide, on average, 3.59 square feet of grocery retail space per capita.

**Table 8. Grocery Gap Indicators**

GROCERY INDICATORS	EXTENDED STUDY AREA	NO NATURE'S FP
Full Service Grocers	3	2
Full Service Grocers per HH	6.43	4.28
Average Distance	0.56	0.85
Grocery Expenditures	\$5.9 Million	\$5.9 Million
Full Grocers Revenue	\$17.0 Million	\$15.6 Million
Grocery sq. ft. per Capita	4.06	3.59

Source: Social Compact, AC Nielsen 2010

On average, residents in the Extended Study Area travel 0.56 miles to reach the nearest full-service grocer. When Nature's Food Patch is not included in the analysis, the average distance that resident's travel for the same purpose is 0.85 miles.

As mentioned above, the Grocery Gap findings for the Extended Study Area suggest that the 2-mile trade area for the Extended Study Area serves as a grocery retail destination - an estimated \$126 million in grocery spending can be attributed to visitors from beyond the Extended Study Area boundary. In the 2-mile trade area, about 8.3% of area residents (or 968 people) live in "critical food access areas" - areas considered to be underserved when compared to the 2-mile study area as a whole. When Nature's Food Patch is not included in the analysis, the percentage of the area population that lives in critical food access areas is estimated at 39.5% (4,617 people).

### Retail and Restaurant Analysis

The market analysis for retail and restaurants reveals that there is no leakage for either of these industries in the Extended Study Area. Retail and restaurant revenues in the East Gateway District are estimated at \$27.7 and \$4.2 million respectively.

Retail and restaurant revenues in the Extended Study area are estimated at \$151.5 and \$15.5 million respectively. Residents in Extended Study Area spend an estimated \$29.1 and \$4.4 million on retail and restaurants, respectively. Household retail expenditures per acre are estimated at \$29,647 in the East Gateway District and \$18,115 in the Extended Study Area.

Retail and restaurant revenues in the Extended Study Area represent, respectively, 9% and 6% of citywide revenues for the same business categories. The lack of retail, grocery and restaurant leakage in the Study Area and the Extended Study Area suggests that these are destination areas where people from the “outside” come to shop and eat; consequently, this is probably an area that

generates significant traffic to attract other businesses. Apparel is the one business category where the market analysis reveals leakage, estimated at \$330,364 in the East Gateway District and \$1.8 million in the Extended Study Area.

Overall, what the market analysis reveals is that the East Gateway District has all of the components to become a livable community, a neighborhood where residents can work, live and access most of the services and businesses they need.

### Business Sector Analysis

**Table 9. Top 20 Businesses in the City of Clearwater based on Employment**

BUSINESS SECTORS	Employees	Sales Volumes	Top Businesses
Other Service (Not Public)	10,786	\$46.0 Million	5 Religious Organizations
Retail Trade	6,750	\$1.5 Billion	9 Supermarket & Grocery Stores, 3 New Car Dealers
Manufacturing	4,402	\$806.9 Million	4 Surgical and Medical Instrument Manufacturing, All Other Plastic Products Manufacturing, 3 Broadcast & Wireless Communications Equipment Manufacturing
Accommodation and Food Services	2,638	\$94.9 Million	9 Full-Service Restaurants, 7 Limited-Service Restaurants
HealthCare and Social Assistance	3,309	\$242.9 Million	6 Nursing Facilities, 3 General & Medical Surgical Hospitals

Source: Social Compact, InfoUSA 2010

An analysis of the City of Clearwater's businesses reveals that the 5 sectors that employ the largest number of people are Other Services (except public), Retail Trade, Manufacturing, Accommodation and Food Services, and Healthcare and Social Assistance. Per Table 9, the “Other Services” sector employs a total of 10,786 people and generates total revenues estimated at \$46 million. Amongst these 20 businesses there are 5 religious organizations.

The Healthcare and Social Assistance sector employs a total of 3,309 people and generates total revenues estimated at \$243 million. Amongst these establishments, there is a concentration of six nursing facilities and three general and medical surgical hospitals.

The East Gateway District is home to 201 businesses, 163 of which are micro businesses (0 to 5 employees), 34 small businesses (6 to 50 employees), and 4 large businesses (51 or more employees). The Extended Study Area is home to 803 businesses, 571 of which are micro businesses (0 to 5 employees), 213 small businesses (6 to 50 employees), and 15 large businesses (51 or more employees). The City of Clearwater is home to 6,360 businesses, 4,193 of which are micro businesses (0 to 5 employees), 1,923 small businesses (6 to 50 employees), and 186 large businesses (51 or more employees). The East Gateway District and the Extended Study Area businesses represent, respectively, 3 and 13 percent of citywide businesses. The proportion of micro businesses in the East Gateway District (4%) and the Extended Study Area (14%) is slightly higher, signaling the presence of a more entrepreneurial population than in the rest of the City. Businesses in the East Gateway District, in total, employ 1,449 people and have estimated annual earnings totaling \$195 million.

Businesses in the Extended Study Area, in total, employ 6,018 people and have estimated annual earnings totaling \$990 million (see Table 10). Businesses citywide, in total, employ 74,639 people and have estimated annual earnings totaling \$9.9 billion.

**Table 10. Extended Area Businesses**

SECTOR	BUSINESSES	SALES VOLUME	EMPLOYEES
Professional, Scientific & Technical Services	162	\$133.8 Million	791
Other Services Except Public Administration	103	\$20.7 Million	357
Health Care and Social Assistance	91	\$99.3 Million	891
Retail Trade	90	\$174.9 Million	814
Finance and Insurance	58	\$63.2 Million	339
Real Estate and Rental Leasing	47	\$29.5 Million	181
Accommodation and Food Services	43	\$21.8 Million	494
Administrative and Support Waste Management	37	\$74.9 Million	624
Construction	33	\$109.1 Million	298
Manufacturing	29	\$40.5 Million	128
Wholesale Trade	21	\$165.3 Million	164
Information	17	\$29.7 Million	104
Entertainment and Recreation	15	\$10.6 Million	68
Educational Services	12	\$1.3 Million	213
Non Classified Establishments	11	.	34
Transportation and Warehousing	11	\$11.9 Million	116
Public Administration	11	.	362
Utilities	1	\$3.1 Million	10
Management of Companies and Enterprises	1	.	30

Source: Social Compact, InfoUSA 2010

## Health Care

In response to community and City interests, the East Gateway PAD™ includes a Labor Market Analysis for the health care sector. The analysis begins by looking at the number of jobs that were available in health care occupations in 2006 and how they compare to 2011 both in the City of Clearwater and the Extended Study Area (Table 11, abbreviated as ESA).

In the City of Clearwater in 2006, there were a total of 11,468 health care jobs. The number of jobs in this sector in the City has not experienced a significant change from then until 2011, with an estimated 11,501 health care jobs. In the Extended Study Area, the number of health care jobs decreased by 10%, from 5,400 in 2006 to 4,874 in 2011. In both the City of Clearwater and the Extended Study Area, the health care occupation that employs the largest number of people is registered nurses. In 2011, there were a total of 2,318 jobs for registered nurses in the City of Clearwater, more than half of which (1,216) were jobs located in the Extended Study Area.

**Table 11. Health Care Occupation Openings**

OCCUPATIONS	City Openings	ESA Openings
<b>TOTAL HEALTH CARE OCCUPATIONS</b>	<b>1,957</b>	<b>553</b>
Registered nurses	330	113
Nursing aides, orderlies, and attendants	208	41
Licensed practical and licensed vocational nurses	186	59
Home health aides	260	12
Physicians and surgeons	161	81
Medical assistants	83	34
Pharmacy technicians	48	14
Pharmacists	30	10
Physical therapists	33	5
Dental assistants	24	5
Radiologic technologists and technicians	21	9
Medical records and health information technicians	29	10
Healthcare support workers, all other	43	5
Speech-language pathologists	23	7
Medical transcriptionists	22	3
Medical and clinical laboratory technologists	28	10
Medical and clinical laboratory technicians	33	8
Emergency medical technicians and paramedics	10	6
Respiratory therapists	12	5
Psychiatric technicians	14	8
Other occupations with less than 14 openings	359	108

Source: Social Compact, EMSI's occupational data (3rd Quarter) 2011

However, the number of registered nurses jobs both in the city and the Extended Study Area has decreased from 2006 to 2011.

Registered nurse jobs are followed by jobs for nursing aides, orderlies, and attendants. In 2011, there were, respectively, 1,732 and 696 such jobs in the city and the Extended Study Area. Again, there has been a decrease in the number of jobs in this occupation in both the city and the Extended Study Area.

In the City of Clearwater, there were a total of 1,957 health care jobs available in September 2011. Per Table 11, of these occupations, the largest demand was for registered nurses (330 in the City of Clearwater and 113 in the Extended Study Area), home health aides (260 in the City of Clearwater and 12 in the Extended Study Area), and

licensed practical and licensed vocational nurses (186 in the City of Clearwater and 59 in the Extended Study Area).

The average hourly earnings for health care occupations vary significantly from occupation to occupation. There is also some variance in certain instances between average hourly earnings in the City of Clearwater and the Extended Study Area. On average, hourly earnings for health care occupations in the City of Clearwater and the Extended Study Area are estimated at, respectively, \$23.62 and \$25.67 (see Table 12). The highest-paid occupations in both the City of Clearwater and the Extended Study Area are physicians and surgeons (\$74 per hour), pharmacists (\$50 per hour) and physical therapists (\$34 per hour). The lowest-paid health care occupations in both geographies are emergency medical technicians and paramedics (\$10.49 per hour), medical transcriptionists (\$10.39 per hour) and home health aides (\$10.22 per hour).

**Table 12. Health Care Average Hourly Earnings\***

OCCUPATIONS	City Earnings	ESA Earnings
TOTAL HEALTH CARE OCCUPATIONS	\$23.62	\$25.67
Physicians and surgeons	\$73.73	\$73.73
Pharmacists	\$50.26	\$50.26
Physical therapists	\$34.13	\$34.13
Registered nurses	\$27.87	\$27.87
Radiologic technologists and technicians	\$25.55	\$25.55
Speech-language pathologists	\$25.34	\$25.34
Medical and clinical laboratory technologists	\$25.30	\$25.30
Respiratory therapists	\$22.60	\$22.60
Licensed practical and licensed vocational nurses	\$18.44	\$18.44
Dental assistants	\$17.16	\$17.16
Medical and clinical laboratory technicians	\$14.44	\$14.44
Medical assistants	\$13.35	\$13.35
Medical records and health information technicians	\$12.86	\$12.86
Pharmacy technicians	\$12.64	\$12.64
Healthcare support workers, all other	\$12.49	\$12.49
Psychiatric technicians	\$11.34	\$11.34
Nursing aides, orderlies, and attendants	\$10.66	\$10.66
Emergency medical technicians and paramedics	\$10.49	\$10.49
Medical transcriptionists	\$10.39	\$10.39
Home health aides	\$10.22	\$10.22

\* Estimated data for the city & Extended Study Area

Source: Social Compact, American Community Survey 2005-2009

## **CONCLUSION**

The market analysis for the East Gateway District and the Extended Study Area suggests that these areas are, for the most part, sufficiently served with financial services, groceries, and retail/restaurant providers. Nonetheless, there is a very small apparel leakage that could potential support 5,500 square feet of this type of retail. Given the large presence of national outlet stores in nearby cities and surrounding areas, Social Compact suggests focusing on local, unique apparel shops, ideally a combination of stores geared towards city residents' and tourists' needs and wants.

The PAD™ reveals that population density in the East Gateway District translates into concentrated buying power that supersedes city figures, even though average household income is comparatively lower. The City should begin by considering options for increasing the Extended Study Area's market size (population and households). Some of the largest stakeholders in the Study Area include FrankCrum, Ultimate Medical Academy (UMA), and Nature's Food Patch. Establishing affordable

housing opportunities for employees and students that work and study in these organizations is a potential way in which the area's market size can increase. These housing developments can be set up as mixed and multi-use apartment buildings, where the first floor can be planned for retail businesses, the second floor for office spaces (ideally for doctors that can then provide internships to UMA students), and the rest of the development can be geared towards housing.

The study found that there has been a significant increase in the number of visitors to the Clearwater/St. Petersburg area that translated to an increase of \$95 million in the past eight months (Jan-Aug 2011). This will likely generate business to local hotels/motels/campgrounds, as well as restaurants. Establishing businesses to attract visitor spending will help to generate new jobs and viable businesses in the area.

In regards to the kinds of businesses that are more likely to make the East Gateway a walkable destination area, businesses that generate more

frequent traffic (i.e. places that require two visits rather than one, such as dry cleaners for the clothes drop off and pick up), restaurants (particularly ones focusing on unique cuisines and local flavors), and businesses geared towards activities of visitors and residents (i.e. pottery stores that have children classes or coffee shops with wireless internet for UMA students) should be considered as essential of this business mix for the area. When thinking about retailers, it is important to note that in the Extended Study Area the retail categories where residents spend most money (other than groceries) are apparel, housekeeping supplies, personal care and restaurants, suggesting that businesses or retailers that have unique housing supplies, as well as maybe spas or personal care services geared towards the needs of tourists and beach living, are likely to do well.

The large number of hotels with affordable prices on the beach and surrounding areas indicates that the hotel industry is not an area where investments should happen in the East Gateway District and the Extended Study Area.

what path the city, residents and stakeholders would like to take in its economic development efforts for the East Gateway District and the Extended Study Area.

While the creation of a destination area or a vibrant market neighborhood is an option, it is not the only option available for the area's development. For instance, another available option is to consider FrankCrum and UMA as anchor institutions as these organizations have a vested interest in the community and its development. Establishing co-op businesses ready to provide services that are currently used by the anchor institutions but obtained far away will help generate new jobs and viable businesses in the area while servicing local stakeholders.

Ultimately, what the PAD™ reveals is that at this point there are no apparent market gaps so any economic development efforts should be based on

# 5



## COMMUNITY INVOLVEMENT



## COMMUNITY INVOLVEMENT

Critical to the community planning process is the engagement of a committed and concerned citizenry. Ownership of the **VISION** is instrumental to the short-term political initiation/acceptance, as well as the long-term implementation. The dynamics of a **community-fostered plan** are what germinate its authenticity and set the groundwork for true placemaking as only can be found in the East Gateway Community.

### FOCUS GROUPS: BNA/SAG/STEERING COMMITTEE

The redevelopment of the East Gateway District is a process that brings together a variety of data, information, knowledge and perspectives to create a directive that is factually based in existing and ongoing summation of conditions, as best understood and recorded, within the immediate boundaries and surrounding areas of influence.

The "community visioning" sessions were initiated into varying levels: neighborhood or association groups (East Gateway Business & Neighbors Association – BNA); and organizations (East Gateway Stakeholders Advisory Group - SAG). These sessions were coordinated in conjunction with the East Gateway Task Force, the CRA and the City. We looked to City staff as to their understanding of the participant groups, timing and locations.

Early in the project, as part of the Data Gathering, Community Involvement and Project Understanding, we attended BNA and SAG meetings as observers to become acquainted with the participants and allow the participants to meet our team. After several meetings discussing the visioning process, schedule and responding to questions and concerns, a Vision Plan Steering Committee was organized, in conjunction with City staff, to serve as the intermediary to the larger community, the BNA/SAG organizations, as well as a sounding board to the City and planning team throughout the project. This allowed for a broader reach-through with direct community representatives.

### EAST GATEWAY VISION PLAN STEERING COMMITTEE

October 3, 2011

Mr. William Horne  
City Manager  
City of Clearwater  
112 S. Osceola Avenue  
Clearwater, FL 33756

Dear Mr. Horne:

The undersigned, members of the East Gateway Vision Plan Steering Committee, wish to inform you of our **enthusiastic support of the visioning process** currently underway for the East Gateway District.

We believe that Gensler, in concert with Social Compact, has **demonstrated an understanding of the business and resident needs/vision** to redevelop the study area into a desirable and vibrant community. We also ask that key actions, such as acceleration of the Cleveland Streetscape Phase III project be supported by the City Council and Staff. It is imperative that potential developers be given a sense of commitment by the City to the plan, which begins with the "bones" of the project - the Gulf to Bay / Cleveland Street corridor. We are all eager to **help the City move forward with these proposed improvements.**

We acknowledge that not every member of the Steering Committee or community may be as supportive of the current effort; however, we believe the majority view this as a very positive action.

**We ask for your continued support** of this undertaking to make the East Gateway redevelopment a reality.

Sincerely,

Maryce Garber, member of the SAG and the BNA  
Dr. Gilbert Janelli, property owner and member of the SAG  
Sam Karas, property/business owner  
Shelley Kuroghlian, President of Clearwater Neighborhoods Coalition and member of the SAG  
Donna Maxa, property/business owner and member of the SAG  
Elvira Morgan, member of the SAG and Secretary of the EGBNA  
Gary Payne, General Manager at Nature's Food Patch  
Mary Beth Scanlon, Principal at St. Cecilia's Interparochial Catholic School  
JoAnna Siskin, member of the SAG and the EGBNA  
Julie Thompson, President of the BNA

CC: Frank Hibbard, Mayor  
George Cretakos, Vice Mayor  
John Doran, Councilmember  
Paul Gibson, Councilmember  
Bill Jonson, Councilmember  
Bill Horne, City Manager  
Rod Irwin, Assistant City Manager  
Geri Campos Lopez, Director of Economic Development and Housing Department  
Ekaterini Gerakios, Community Development Coordinator  
Keith Greninger, Project Manager at Gensler

# COMMUNITY INVOLVEMENT

## Outreach Programs

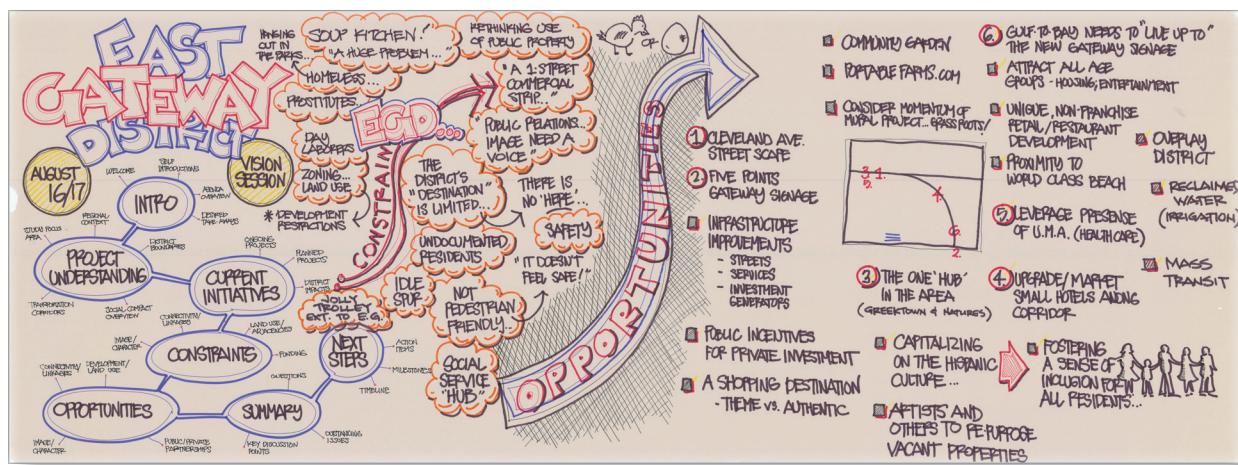
Announcements and distribution of information regarding designated Vision Sessions or Focus Group meetings were coordinated with the City & the Steering Committee, as well as other leadership groups (BNA/SAG), educational institutions (St. Cecilia's Interparochial Catholic School and UMA) and larger district employment groups (FrankCrum), to garner the largest pool for attendance. Information was distributed in a variety of formats including electronic, newsletters, bulletins, door hangers, etc.

## FOCUS GROUP MEETINGS

The Focus Group meetings allowed us to reveal our preliminary findings of both the market feasibility and the physical attributes to the community. This setting gave us the opportunity to hear directly from the community and collect the goals, desires, their own personal observations, likes/dislikes and discuss other comparable communities they feel are representative of the environments they would like to see in the East Gateway District. From those who participated from the neighborhoods



and the business and community, as well as through continued work with the City and various contributing organizations, we got a sense of where the community needed assistance, what kind of community was desired, and how to build upon the data collected to create that Vision. Additionally, City Staff conducted a Focus Group Meeting in Spanish for the local Hispanic residents and business owners. During the meeting, they reviewed the scope of work, preliminary findings, and received valuable input from the participants.



The goal is to address opportunities and strengths of the District and the main objectives through a series of tools or exercises. These exercises will flush out any weaknesses, concerns, misunderstandings, or oversights, so the directives we initiate will enable improvements through the concept plan, policy framework and recommendations. Based upon the findings of all three resources (market feasibility, physical attributes and community goals), we began the creative response of the strengths, weaknesses, and opportunities to achieve the highest and best use of all resources.

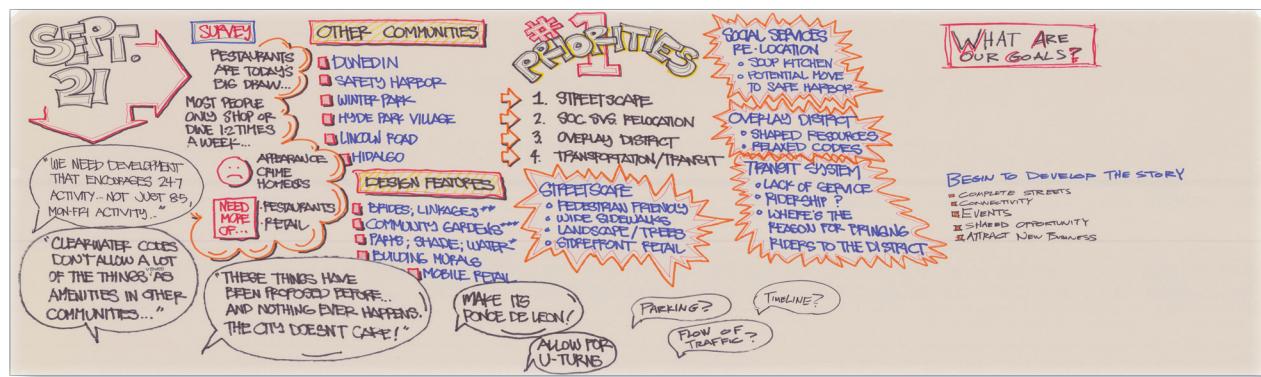
# COMMUNITY INVOLVEMENT

## CHARRETTE/COMMUNITY WORKSHOP: DAY ONE

To brief the community on activities leading up to the workshop, the team made a series of quick summarizations of activities taken to date. A review of plans, maps, meetings and Steering Group directives were presented. We introduced the planning process and review of terminology such as demographic areas, Greater City, Extended Study Area, Study Area, and phrases like market “attractors” and “leakage” for the participants to understand the context of influences that are shaping the decision-making process.

## Market Analysis Report

Social Compact presented their findings in a statistical format to graphically depict the District in comparison to the other Clearwater demographic areas. The essence of the findings and reporting shown to the community formed the underpinnings on the development directives the community could build upon to create short- and long-term opportunities. The report in all cases referenced back to the Study Area in general terms such as population (2% of the City), ethnicity (34% Hispanic vs. 17% of the City), etc.



Usted es invitado a participar en la creación de un plan para el futuro de nuestra comunidad

La Ciudad de Clearwater desea su participación en ideas para mejorar el Distrito del East Gateway. Para realizar eso, estamos planeando una serie de talleres abiertos al público para desarrollar una visión para la comunidad del East Gateway, y como juntos podemos hacer esa visión una realidad.

## TALLERES COMUNITARIOS ABIERTOS

Venga a cualquier hora, quédese por el tiempo disponible. Se proveerán comida ligera (snacks). Para más información, hable con Ekaterini Gerakios al 562-4047 o por correo electrónico Ekaterini.gerakios@myclearwater.com

Miércoles, 21 de Sept., 4 a 7 p.m., Greektown Grille, 1230 Cleveland St.

- Repasar información de compra-venta de locales
- Discutir y comparar comunidades similares
- Generar ideas en grupo
- Identificar proyectos

Jueves, 22 de Sept.

- Revisar locales para desarrollo
- Revisar desafíos y oportunidades
- Revisar alternativas
- Discutir sobre el desarrollo de un nuevo diseño para la marca



You're invited to help us envision the future of the East Gateway Community.

The City of Clearwater wants your input on ways to breathe new life into the East Gateway District. To do that, we're planning a series of drop-in public workshops to help build a vision of what the East Gateway community can become, and decide how together we can make the vision a reality.

## DROP-IN WORKSHOPS

Come any time, stay as long as you like. Refreshments will be provided. For information, contact Ekaterini Gerakios at (727) 562-4047 or email Ekaterini.Gerakios@myclearwater.com

Wednesday, Sept. 21, 4 – 7 p.m., Greektown Grille, 1230 Cleveland St.

- Review market data, real estate opportunities and community goals
- Discuss and compare similar communities
- Generate ways to spur development
- Identify projects and set priorities

Thursday, Sept. 22, 4 – 7 p.m., Greektown Grille, 1230 Cleveland St.

- Review development sites and project possibilities
- Review land use constraints and opportunities
- Look at preferred alternatives for projects, locations and priorities
- Discuss marketing: improve the East Gateway's image, nurture a new focus and develop a strategy to create a neighborhood brand



## COMMUNITY INVOLVEMENT

Other community snapshots synthesized in the presentation touched on several topics:

**Education:** St. Cecilia's Interparochial Catholic School, UMA and providers, and general statistical population trends.

**Income Levels:** Average household, per capita, and an interesting revelation of "Revenue Density" as a product of per capita income over population demographics that indicate a concentration of income within the East Gateway District.

**Financial Services:** Within the Extended Study Area, there is great overall access to financial institutions (5 banks and 2 credit unions).

**Grocery:** There is one full-service grocer in the Study Area (Nature's Food Patch) and three within the Extended Study Area. This offers very good ratios for the population base with minimal travel distance of less than 0.56 mile to grocery services.

**Retail & Restaurants:** Within the overall study of revenues for the city across a variety of sources, the statistics had shown that the East Gateway represents over 5% of the revenue for retail & restaurants. With only 2% of the population, this indicates that the District is an "attractor" for this market segment and suggests that destination development around this market can generate significant traffic for other businesses.

**Expenditures:** The apparel market within the Study Area is significantly lower and appears there is "leakage" to other districts or areas. Due to the large presence of outlets and national apparel retailers nearby, the opportunity for this market is minimal. We recommended a focus on local, unique apparel shops, ideally a combination of stores geared towards Clearwater residents as well as tourists looking for unique clothing options.

**Crime:** Statistical data shows that the District is one of the highest crime areas in the City. Continued efforts by the police and community groups to curtail these activities should be supported.

It should be noted that the community perception of the social services offered within the District greatly add or contribute to the concentration of crime data. This has been a long standing concern of the community and ranks very high on the Community Goals Desires and Priorities.

### DrillDown PAD: Clearwater

Findings

Social Compact. Inform < Apply < Impact

Clearwater, FL

Catalyzing Investment for the  
Common Good

September, 2011

SocialCompact 1

**Q4: What are the most important factors that discourage you from doing more activities in the East Gateway?**

## COMMUNITY INVOLVEMENT

### COMMUNITY SURVEY

To reach the largest concentration of user groups that frequent the District on a regular basis we surveyed the employment base at FrankCrum, faculty and students at UMA and the parents and staff at St. Cecelia's Interparochial Catholic School. We polled them on a variety of general access and engagement issues.

Some of the more significant statistics that were derived from the survey are: 67% come to the District for employment; over 60% travel five miles or greater to reach the District; 63% visit restaurants; 41% grocery shop and 33% do some form of retailing while in the District. The attractions to the District and general downtown area are company sponsored events, farmer's market and jazz festivals.

The overwhelming percent of issues of concern were related to community appearance, crime and homelessness. This was strong evidence of areas to concentrate our efforts and match many of the resident and community goals (see survey results in the Appendix).

	MOST IMPORTANT	SOMEWHAT IMPORTANT	NOT AS IMPORTANT
Neighborhood Appearance	71%	18%	7%
Crime	81%	10%	8%
Homeless Population	74%	15%	11%
Availability of Parking	25%	33%	28%
Availability of Restaurants	41%	36%	12%
Availability of Retail Options	47%	33%	11%
Variety of Service Providers	28%	37%	17%

## COMMUNITY INVOLVEMENT

### COMPARABLE COMMUNITIES

Throughout our engagement with the community, participants often referred to other communities or settings where they had memorable or enjoyable experiences. At these meetings and specifically through the Focus Group and Steering Committee meetings, we polled attendees of desirable and complimentary communities or places they recommend we study. We identified six communities:

**Dunedin, FL**

**Safety Harbor, FL**

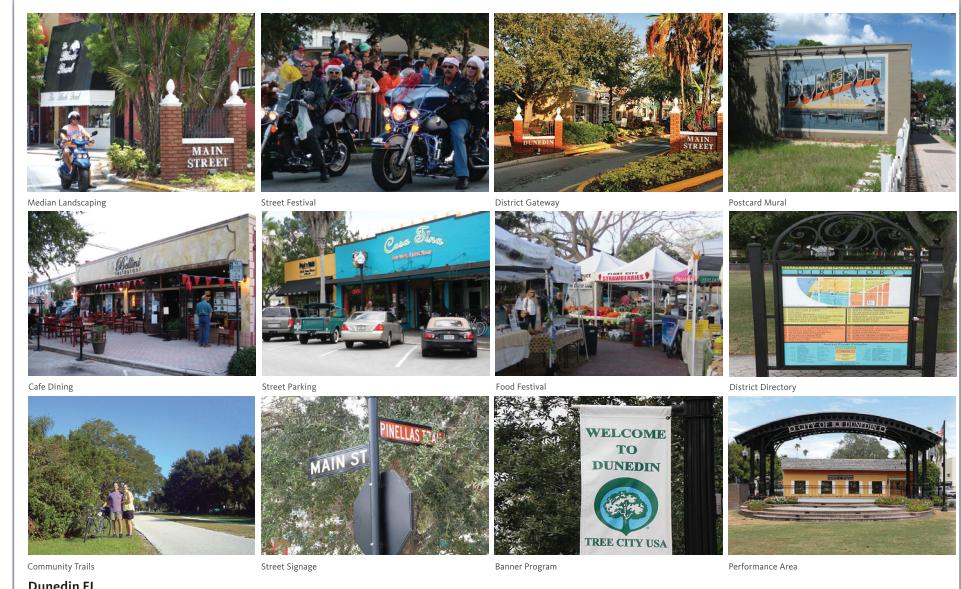
**Winter Park, FL**

**Hyde Park, Tampa, FL**

**Hidalgo, Mexico, and**

**Lincoln Road, Miami Beach, FL**

We then asked the community workshop attendees to identify, through a visual preferencing exercise, the attributes/settings they found most appealing.



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Safety Harbor FL

City of Clearwater | East Gateway District

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## COMMUNITY INVOLVEMENT

### IDEAS AND FEATURES

As another exercise through visual preferencing, we again asked the attendees to identify features or offerings they would like to see within the community. They were asked to identify not necessarily a town, neighborhood or communities as demonstrated in the previous exercise, but ideas, activities and events that would lead us to some of the functional aspects of the redevelopment plan.

The community identified several preferred features that included community gardens, shade structures, pedestrian bridges and a possible art contribution of architectural murals the Verizon building facades (see Community Involvement section of the Appendix).

The collage includes:

- Plot Layouts:** A grid of raised garden beds.
- Raised Gardens:** A view of several wooden raised garden beds.
- Mature Garden:** A lush, well-maintained garden with various plants.
- Harvest Time:** People sitting at tables outdoors, eating a meal prepared from harvested produce.
- Produce:** A variety of colorful bell peppers (red, green, orange, yellow, purple).
- Floral Gardens:** Pink hyacinth flowers in bloom.
- Floral Trellis:** A yellow rose growing on a trellis.
- Vegetables:** A bowl of green beans and other vegetables.
- Community Bonds:** A group of diverse people standing together in a garden.
- Sweat Equity:** Children working in a garden with adults.
- School Programs:** A group of students and adults posing in front of a garden.
- Development Plans:** A circular diagram titled "COMMUNITY GARDENS essential infrastructure" with various components listed around it.

**Community Gardens**  
City of Clearwater | East Gateway District

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The collage includes:

- Water Curtain:** A large metal frame structure over water.
- Water Projection Art:** Silhouettes of people and animals projected onto a water surface.
- Water Sculpture:** A person walking through a fountain.
- Water Curtain Color:** A stage with a large water curtain illuminated with bright lights.
- Banner Shades:** A red and white striped canopy over a park area.
- Tent Structure:** A large white tent-like structure at night.
- Shade Structure:** A modern shade structure on a grassy hillside.
- Urban Arbor:** A tall, multi-trunk tree structure supporting a walkway.
- Park Signage:** A sign for "PROSPECT LAKE PARK CITY OF CLEARWATER".
- Viewing Deck:** A wooden deck overlooking a park area.
- Water Fountains:** A large fountain in a park.
- Seating Area:** A paved seating area near a lake.

**Parks - Shade - Water**

City of Clearwater | East Gateway District

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## COMMUNITY INVOLVEMENT

### COMMUNITY GOALS AND DESIRES

After the participants identified visual options of what they perceived as desirable opportunities for their community, the planning team led a discussion on what the development drivers (or impediments) might be for these goals. The list expanded and all who had an opinion or thought contributed to the discussion. The Community Goals (Mind Mapping document on this page) captures all of the goals that the community identified as most important during the Focus Group meetings.

To achieve consensus, or at least a more unified understanding of what the development drivers represent, we engaged in a methodology called “mind-mapping”. As part of the mind-mapping exercise, each topic was discussed openly within the overall group to funnel the thoughts and ideas of each of the development drivers more narrowly.

As a result of these exercises, we consolidated the community goals with an acceptable understanding of what the goals represent and have established a Development Checklist as directives to be incorporated into the Vision Plan.

### COMMUNITY GOALS – MIND MAPPING

<b>Activities</b>	Children / Young Adults
<b>Brand Identity/Strategy</b>	Unique / Authentic / Cultural
<b>Business Incentives</b>	Funding Alternatives / Façade program
<b>Code Enforcement</b>	Dumpster Enclosures
<b>Community Gardens</b>	Vegetable/Floral
<b>Events</b>	Festivals / Outdoor Market
<b>Leverage District Partners</b>	Medical/Technology Cluster Retailing
<b>Mural Program</b>	Additional Site Opportunities Funding and Tour Program
<b>Overlay District</b>	Land Use / Zoning Shared Resources
<b>Parking Solutions/Availability</b>	Public / Private
<b>Parks, Trails and Boardwalks</b>	Stevens Creek
<b>Police Presence</b>	Community Policing / Hot Spots
<b>Sidewalk Construction</b>	Connectivity/Continuity / Safety
<b>Social Services Relocation</b>	Soup Kitchen / Transitional Housing
<b>Streetsape Phase III</b>	Cleveland thru Gulf to Bay
<b>Transportation / Transit</b>	Trolley Extension / PSTA

## COMMUNITY INVOLVEMENT

### CHARRETTE/COMMUNITY WORKSHOP: DAY TWO

As a manner of housekeeping and to brief any attendees who could not make to the Day One Workshop, as well as summarize for those who did, we opened with a brief review of the exercises undertaken the evening before. This allowed for questions regarding the entire process and briefings by both the planning team and City Staff.



### EAST GATEWAY VISION PLAN COMMUNITY WORKSHOPS AGENDA

#### Thursday, September 22, 2011

##### Workshop Goals and Expectations

##### Review of:

- Goals and Priorities
- Development Evaluation Checklists
- Development Zones and Project Opportunities
- Concept Planning
- Preferred Alternatives
  - Alignment with Evaluation Checklist
  - Projects, Locations, Prioritization

##### "Brand Strategy" and "Community Image Development":

- Create New Focus and Direction for the East Gateway

## DESIRSES AND PRIORITIES

The Development Checklist was an all-consuming description of issues to be addressed. We asked the participants to prioritize what was necessary and critical to achieve through the community redevelopment vision. The team stressed that all issues would be included and that "nothing was off the table." However, setting priorities, understanding potential sequencing of goals and creating funding mechanisms and various regulatory processes would have to be in place for implementation to occur. The community members in attendance ranked and defined their preferences for redevelopment activities.

The document on this page captures the final ranking of all previously identified community goals. Streetscape Phase III received the most votes, Social Services was the second most popular and the concept of an Overlay District was the third most popular choice.

### East Gateway Vision Plan Community Workshop

Wed. Sept 21, 2011

#### Community Goals

##### Desires and Priorities

##### Voting Results

#### 1. Streetscape Phase III

- Cleveland thru Gulf to Bay
- Median Design (U-Turns possible)
- Cross Street Access
- Destination Development
- Safe, Secure Pedestrian Zones
- Lighting & Landscaping
- Service & Delivery Truck Accessible
- Parking Solutions

#### 2. Social Services

- Soup Kitchen Relocation
- Rid Homelessness/Drugs & Prostitution
- Safe Harbor location option
- City Manager & Organization Discussion Meetings

#### 3. Overlay District

- Land Use/Zoning
- Code Development
- Shared Resources
- Signage Regulation
- Building Placement

#### 4. Transportation/Transit

- PSTA Routes & Shelters
- Trolley Extension to District
- Bicycles
- Other Mobility Vehicles

#### Business Incentives

- Police Presence
- Brand Identity/Strategy
- Parks, Trails & Boardwalks
- Leverage District Partners
- Parking Solutions/Availability
- Sidewalk Construction

#### Code Enforcement

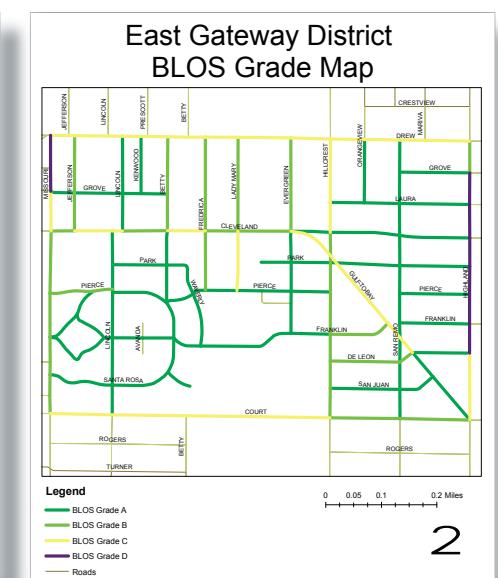
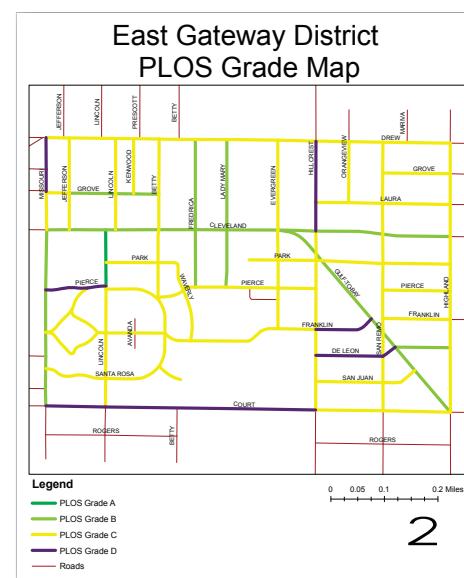
- Community Gardens
- Events
- Mural Program

## COMMUNITY INVOLVEMENT

### DEVELOPMENT OPPORTUNITIES

The planning team, armed with information gathered across all basis of the form-givers [Context (General and Physical), Data Gathering/Research and Community Participation], embarked on the formulation of the physical realization of where and how the various development drivers contribute to the transformation of the District.

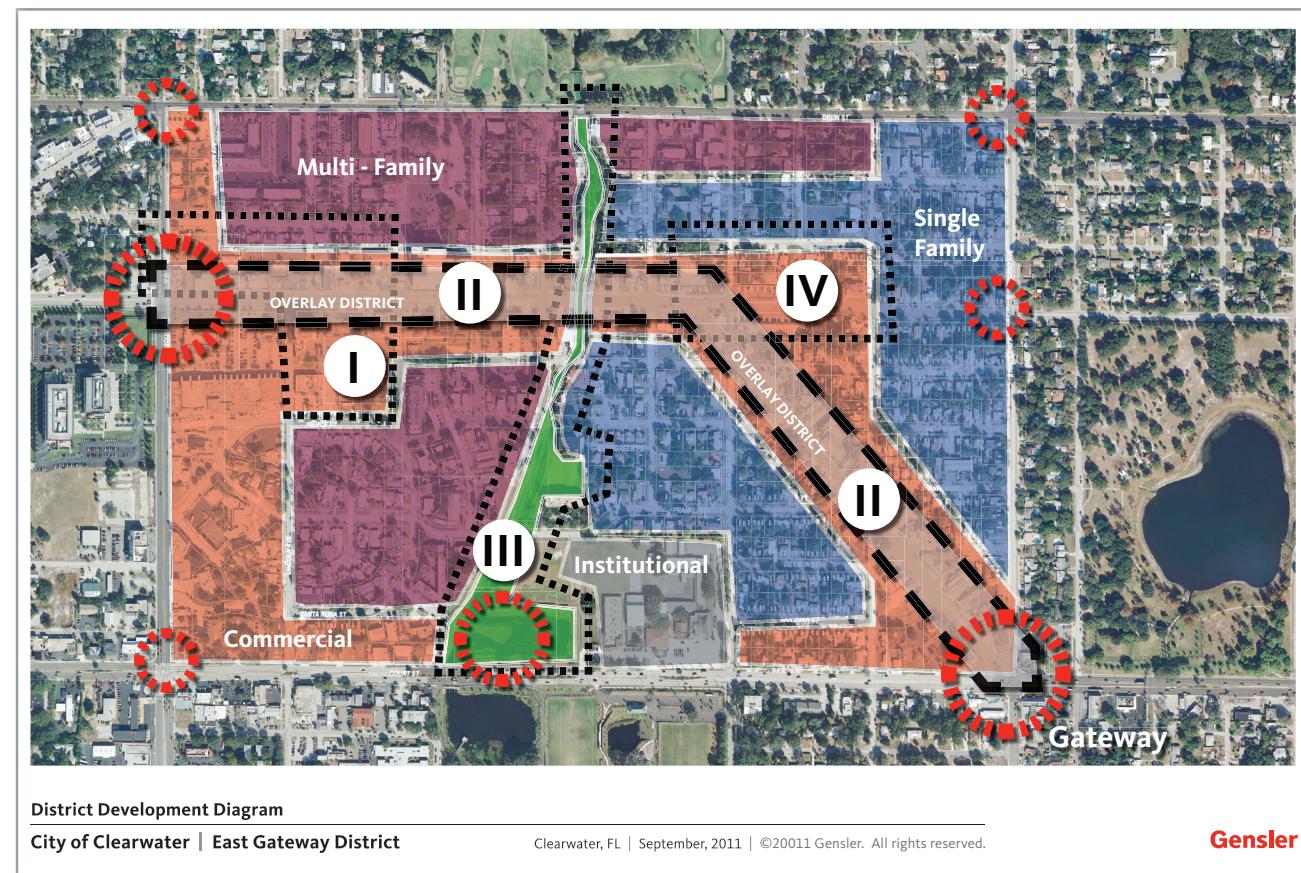
We generated a strategy that focused on the various development types, rather than the strict definition of the zoning or land use types that currently exist within the District. This helped to better understand the connectivity to, and within, each of the identified development types.



## COMMUNITY INVOLVEMENT

Building upon strategies currently underway (Gulf to Bay/Highland Intersection Improvements), Cleveland Streetscape design, as well as programs like the Facade & Building Lot Improvement Program, new sidewalk construction and the City's code enforcement activities for eroding derelict sites and neighborhood dumpster visual blight, the planning team identified four zones or initiatives that addressed differing desires taken from the community goals. **Development Zone**

**I** to assist with redevelopment opportunities and economic growth utilizing City-owned real estate (former Economy Inn site) around the community attractors of UMA, Nature's Food Patch and the Greektown Grille; **Zone II** to further the streetscape initiative along Cleveland Street and Gulf to Bay Boulevard and development of an Overlay strategy easing the regulatory process; **Zone III** to capitalize on the natural offerings of the community with recreation and community open space; and **Zone IV** to create the "core," or central gathering place, that is transformative for a variety of community-building events and activities.



## COMMUNITY INVOLVEMENT

### BRAND STRATEGY

As a finale to the Community Workshops, the Planning Team introduced the concept of a Branding Strategy to be undertaken to assist in the transformation of the community. The “idea” of the East Gateway and the re-positioning of the District as a destination with a sense of place is to be captured and made real through a local, culturally driven, authentic, community engaging process. Redevelopment occurs through a recognized process of community vision, infrastructure investment and marketing.

The development of a brand is a methodical community self-discovery that creates a memorable experience with the participants, both residents and visitors.

We encourage the City to engage in this discovery and assist in the redevelopment process that will transform a community and the lives of its participants.

“Brand is not inventing what you should be but rather uncovering the potential of what you are.”

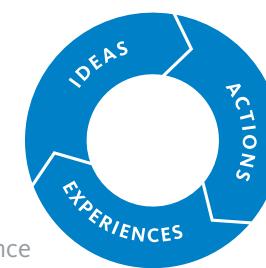
What does a brand do?

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Differentiate

Deliver Value

Create Preference



# 6

## CONCEPT PLAN



## EAST GATEWAY DISTRICT DEVELOPMENT

As we looked at the overall development opportunities within the East Gateway District, we first mapped the existing development types categorized in general terms: commercial, residential (both single family and multi-family), institutional, and open space. These differ slightly from land-use or zoning maps only to reinforce the communal nature of the District.

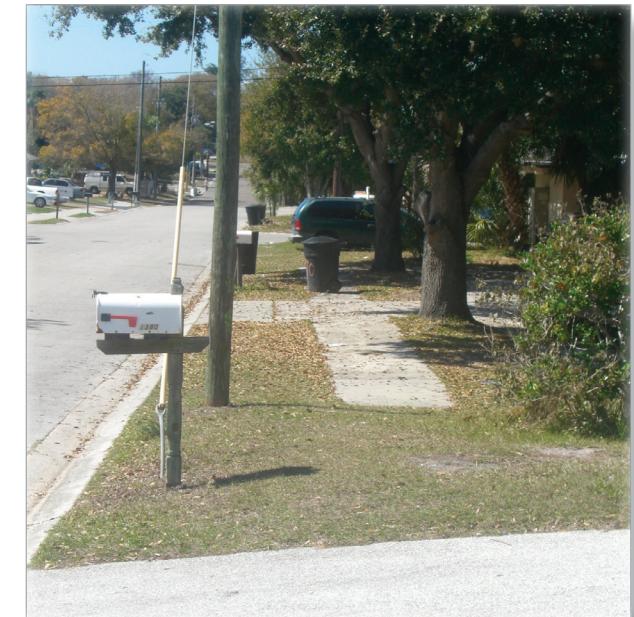
We also offered locations of community thresholds as potential gateways or entry markers at various scales to continually reinforce the District as a community and support a future branding strategy.

General issues that are common place across the District and need to be addressed through community perseverance and policy commitment entail:

### DISTRICT DEVELOPMENT

#### Neighborhood Appearance

Street appearance throughout the neighborhoods, either single-family or multi-family, either offers a sense of pride and resurgence or is evidence of a decaying community. The overwhelming presence of dumpsters at the curbs within the East Gateway community is threatening to a neighborhood trying to rebound. Unmaintained properties, shoddy facades and inconsistent sidewalk patterns are resolvable issues that can dramatically impact and promote the turnaround of a community, block by block.



#### Social Services

Consistently throughout our interaction with the community and explicitly through our community survey, the negative impacts of the less fortunate inhabitants subscribing to the services offered at the soup kitchen and the day labor establishments are of major concern. The fallout of loitering and the constant presence of the homeless, whether real or perceived, is that the safety and well-being of district residents, employees and visitors is at risk at that area. The City Administration is encouraged by the East Gateway community to continue to strive for a resolution for an alternative location for these services.

## EAST GATEWAY DISTRICT DEVELOPMENT

### Transit and Transportation

With proximity to Downtown Clearwater and on route to our world-class beaches, the extension of transportation services like the Jolley Trolley and additional routes from PSTA to and within the District, will greatly affect the viability for redevelopment. With the strong patronage by UMA students and the local Hispanic community and the potential of a growing urban business core to utilize these transportation options for expanded food and beverage options, the East Gateway District will benefit and assist to sustain their operation.

### Business Assistance

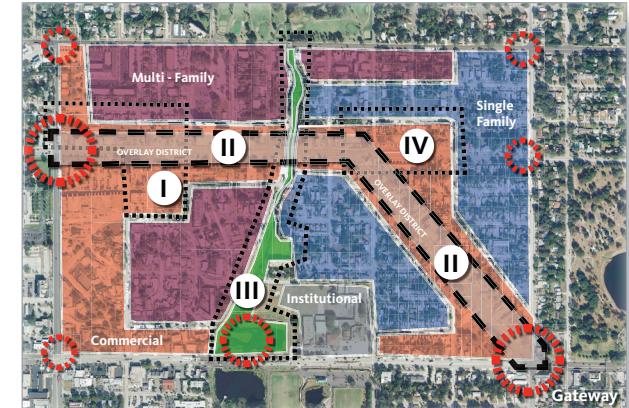
Above and beyond the great opportunities afforded by such programs as the Façade and Site Improvement, additional assistance to established and potential businesses looking to locate within the District could provide a variety of services. Coalitions of various business groups (restaurants, legal services, property management, etc.) to assist each other, share resources and form alliances to promote the District as a business-friendly environment and build upon their respective successes are critical and very important.

### Safety/Security

Increase security through upgraded lighting program, greater police presence and introduction of campus-style call or alarm stations distributed throughout the District.

### Branding

Market repositioning of the District will be an essential tool to attract redevelopment. Creating a thorough brand strategy for the District will initiate the public relations campaign for District revitalization.



Through our research, understanding of the physical context, market analysis, demographic trends and extensive community participation sessions, we identified four zones for focus of future redevelopment efforts.

The redevelopment zones address differing needs ranging from targeted industry incentive zones, stronger commercial “attractors” with supporting development, embellished natural features with community-driven open space programming, an identified “destination core” for community gatherings and “sense of place,” and an enhanced corridor through continuing efforts west of the District with scheduled intersection improvements, coupled with opportunities of a “corridor overlay district” to stimulate reinvestment, coordination among property owners for mutual gain and regulatory adjustments strengthening the attractiveness of the area.



## DEVELOPMENT ZONE I – WEST COMMERCIAL ANCHOR

The intersection of Missouri Avenue and Cleveland Street has been recognized as a major entry node in the East Gateway District, and we recommend it be developed as such. We propose the continued extension of the Cleveland Street improvement project to extend minimally to Betty Avenue, inclusive of the former Economy Inn site, for recognition of community and City investment and support for private investment. The streetscape improvements will add capacity to the district parking count, expand pedestrian café opportunities and create traffic calming attributes to encourage a walkable environment.

Our market research has indicated that Zone I is an “attractor” from the region for commercial activities and needs to be reinforced in order to create extended

stay and additional commercial interaction for those regional customers. Nature's Food Patch, the Greektown Grille, and Los Mayas Mexican Restaurant contribute to the “attractor” status, they are models for additional commercial activities in this Zone, and they can be the base of a cluster of businesses to serve a wider range of consumers.

Ultimate Medical Academy (UMA) and FrankCrum are large regional educators and employers adding vitality and an economic base to this Zone. UMA offers a unique opportunity to attract additional users to this Zone through partnerships of medical and technology clustering building upon UMA's “externship” and job placement strategies. UMA trains students for careers in the allied health field (medical technicians, dental assistants & hygienists, laboratory assistants, etc.) and can be a source of interns and future employees through a revolving resource in an attractive location recognized by consumers as a “destination.” Continued support of UMA's growth and facility needs at their location, associated industry development and parking demands can potentially have the largest impact to the redevelopment of the District.



## DEVELOPMENT ZONE I – WEST COMMERCIAL ANCHOR

To facilitate the educator/employer relationship in the East Gateway District, we have identified the former Economy Inn site as a prime opportunity to create a mixed-use real estate development serving the medical/technology industry supported by the UMA externships and graduates, the residential and consumer needs of those employees, as well as the Clearwater Strategic Plan.

The former Economy Inn site, at approximately 2.2 acres has a development density of .55 (FAR) floor area ratios (52,700 sf), and a residential density of 30 units per acre (66 units), can comfortably support a mix of these entitlements. Redevelopment opportunities to match needs orchestrated through research of the current and potential partnerships of UMA and commercial expansion and housing demographics can be accommodated and contribute immensely to the 24/7 dynamic livability of Zone I.

Regulatory incentives to assist this Zone and the overall Cleveland & Gulf to Bay corridor enhancement can be realized through an Overlay District supplement to the existing land development codes specific to the recognized needs of the District.



## DEVELOPMENT ZONE II - CORRIDOR DEVELOPMENT

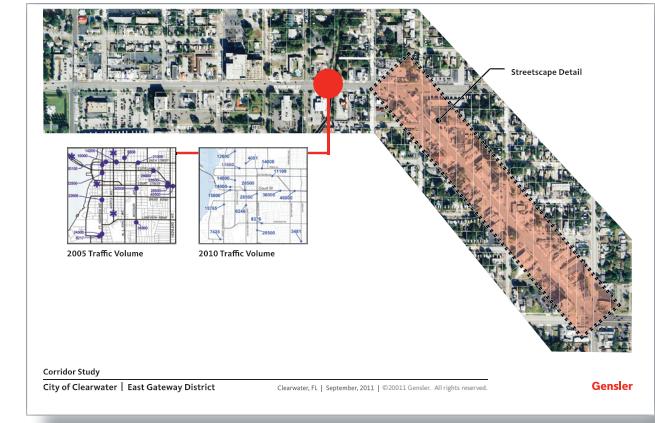
The essence of this Zone derives from the previously mentioned Cleveland Streetscape standards that have occurred currently west of Missouri Avenue. Zone I initiates this concept of the streetscape through the East Gateway District, and we show here the Gulf to Bay opportunities, culminating on the east at the "Five-Points" Intersection located at the corners of Gulf to Bay Boulevard, Court Street, and Highland Avenue.



Zone II completes the overall corridor by linking the downtown with the Five-Points intersection.

The opportunity to readdress the corridor design comes through the rerouting of the beach traffic onto Court Street with the opening of the new Memorial Causeway Bridge. The traffic counts along the Gulf to Bay and Cleveland Street corridor, as documented by the Pinellas County Metropolitan Planning Organization (MPO), reduced from a high of approximately 26,000 trips per day in 2005 to slightly over 11,000 trips per day in 2010.

This allows for traffic lane reductions and a redistribution of the right-of way width to develop what is commonly referred to as "complete streets." The public realm program of activities for the corridor balances vehicular needs with pedestrian needs, accommodates bicycle paths, landscape, café and street retailing, parking opportunities and creates a human comfort through calming devices separating the vehicular and pedestrian conflict.



Transition from a vehicular-oriented corridor to a pedestrian-oriented corridor changes the dynamic of the community and focuses the marketing and branding of the area as a destination and place, as opposed to previous strategies as a drive-by attraction dependent upon a "happenstance" economy.

The evolution of the District is tied to a number of existing and proposed strategies.

The immediate initiation of Phase III of the Cleveland Street Streetscape improvements continuing east past Missouri Avenue will be catalytic to the corridor transformation. Improved pedestrian zones, landscaping and additional parallel parking will attract development interest and investment.

The Façade and Building Lot Improvement grant program offered through the CRA can assist commercial property owners with improving the appearance of their properties and transforming the "look and feel" of the corridor.

## DEVELOPMENT ZONE II - CORRIDOR DEVELOPMENT

Acquisition of the CarPro site as an investment parcel was strategic along this redevelopment corridor. Current opportunities are fairly limited, but as a central site to a larger development strategy through consolidation of adjacent parcels, this site offers a premier development opportunity as other investments and the corridor improvements proceed through the District.

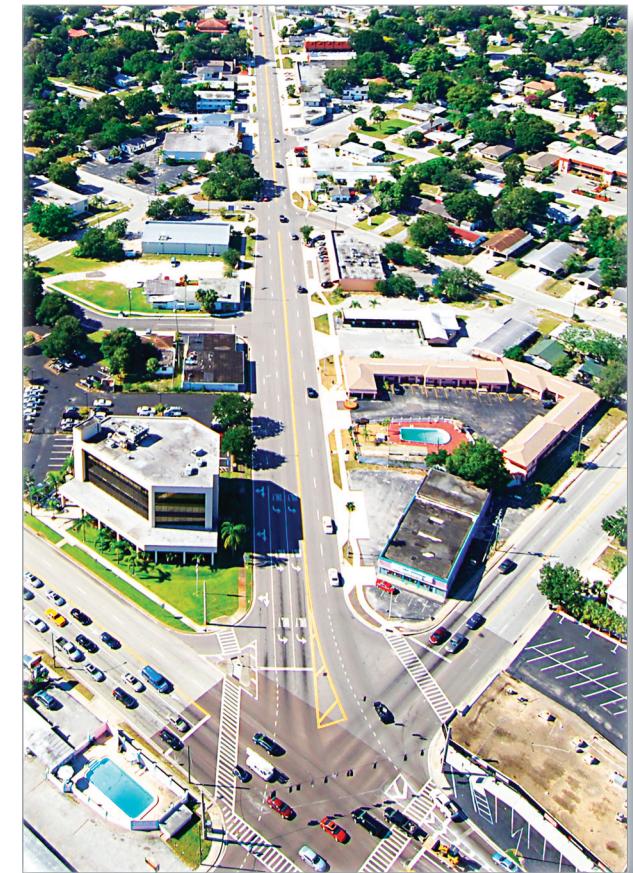
The proposed improvements at the Highland Avenue, Gulf to Bay and Court Street intersections, also known as "Five-Points," will create an attractive announcement to the current high volume traffic counts on Court Street that there is a "destination district" at the new gateway. Construction for this project began in December 2011.

We recommend the development of a specific Overlay District tailored to the specific needs and desires of the community for the corridor. Overlay Districts are special zones that lie on top of existing zones and they enhance or replace existing regulations. The overlay will be an amendment to the existing regulatory documents and will utilize the concepts expressed in the existing Downtown Development Guidelines. As the community and the City define the objectives of the overlay, these will be added to the guidelines.

Thus, the boundary of a proposed Overlay District would facilitate the coalescing of the regulatory policy. Further research and community involvement will be required to fully develop the range of standards to be formulated and adopted to embrace the physical context, development demand, market conditions and social change to achieve the desired outcome.

Several suggested policies to be considered for an Overlay District are:

- Reduced Parking Requirements
- Street Parking Standards
- Shared Parking



- Parking Partnerships
- Lot Line Development Placement
- Shared Stormwater Retention
- Open Space Standards
- Café Dining Standards
- Operating Hours
- Transitional Use
- Mixed-Use Development
- Signage Standards

## DEVELOPMENT ZONE II - CORRIDOR DEVELOPMENT

The proposed plan illustrates a variety of the concepts mentioned here as well as goals and desires revealed at several of the community meetings. The plan is a concept plan to stimulate the community interest and demonstrate the opportunities the corridor could

unveil. We met with staff from the City's Planning & Development and Legal Departments and reviewed the concept for potential issues. All concluded that the ideas were well within the jurisdiction of their departments to pursue as an objective. The plan, as an



idea in nature, would stimulate a series of additional studies to satisfy engineering requirements, meet community needs, and create the overlay language to fully execute the concept presented here.



Development Zone II - Overlay District - Gulf to Bay Streetscape

City of Clearwater | East Gateway District

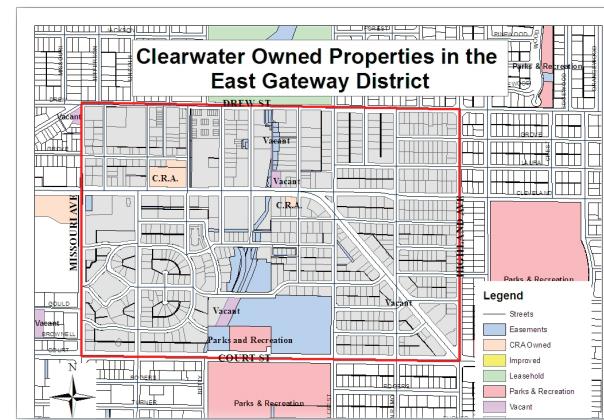
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## DEVELOPMENT ZONE III – OPEN SPACE

Community connectivity is so important to the vitality and livability for its inhabitants. As a community on the “urban edge”, the offering of open space not only makes it an attractive alternative to the “urban core”, but it becomes that differentiator that can distinguish a community.

The natural amenity of Stevenson Creek running through the physical center of the community has the opportunity to create that differentiator, as well as serve as the connector to the peripheral open space amenities of Glen Oaks Park to the south across Court Street, and the Clearwater Country Club across Drew Street to the north. Many residents currently make these ties on a regular basis. This plan proposes to formalize those connections in a safe and responsive way.



Through the community involvement process of this engagement, we learned of the community's desire to take advantage of the outdoor environment. Several meetings began to shape the opportunities expressed by East Gateway residents of other comparable community settings or offerings that formulated the programmatic basis of events and activities desired in their neighborhoods.



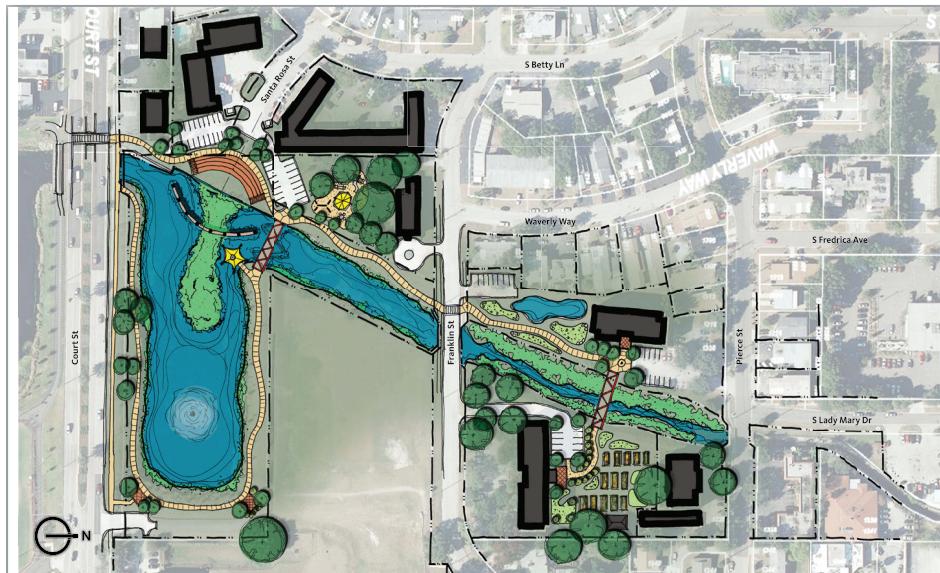
## DEVELOPMENT ZONE III – OPEN SPACE

As we studied the Stevenson Creek drainage canal, learned of its edges easements, experienced its natural beauty and history, and engaged in conversations of potential partnerships with adjacent property owners, we recognized this as a unique opportunity to transform an underutilized piece of infrastructure, as a drainage canal, into a unifying source of community pride and feature.

The plan reflects the culmination of several goals, desires and opportunities: the previous experiences of transformation of retention ponds into community parks through simple trail and pavilion offerings similar to Prospect Lake Park, community input on desire to initiate community garden development through a partnership on the vacant land of the Creekside Manor residences in exchange for a connecting pedestrian



bridge across Stevenson Creek; an understanding of the community ethnic heritage of Hildago, Mexico and potential visual icons to create an identity and a gathering place, the need for a children's playground within the community to minimize the dangerous crossing of high-volume Court Street, etc.



## DEVELOPMENT ZONE IV – FESTIVAL CORE

Through the transformation of the Cleveland Street and Gulf to Bay corridor and the creation of a walkable district, the establishment of a core gathering place is essential for community identity, pride and ownership. This “place” is for continual community interaction, whether a formal activity such as an art festival, book fair, fresh market, or cultural event, or a simple place to rest, read a newspaper, and stroll to after a nice meal. It will be known “the place” where the community assembles.

These are ideas, goals and desires that surfaced out of the community focus sessions, the market study, and our experience in placemaking and community building. The obvious location to create such a place is at the crossroads of major thoroughfares where linkages to the surrounding neighborhoods and the greater community are simple and direct. East

Gateway’s “main & main” occurs at the intersection of Cleveland Street & Gulf to Bay Boulevard.

These two corridors intersecting at an oblique angle create a visual terminus that can be recognized through the length of each corridor. At this key location an iconic feature can create that “place” that becomes the gathering spot or meeting place. Cultural significance, branding and community input to the shaping of the space is critical to create pride, ownership and the authenticity of place that makes it unique and memorable.



As Cleveland Street continues eastward, the lane reduction within the existing right-of-way affords an opportunity to increase the edge landscape and develop infrastructure zones for power, data, lighting, and structural connections for shade, advertising and visual stimulation. The development of this Festival Core with the proper infrastructure facilitates the ease of event planning, options to a variety of events and minimizes the disruption of day-to-day activities. Transportation planning can be orchestrated to allow street closures so as not to impact access to the surrounding businesses.

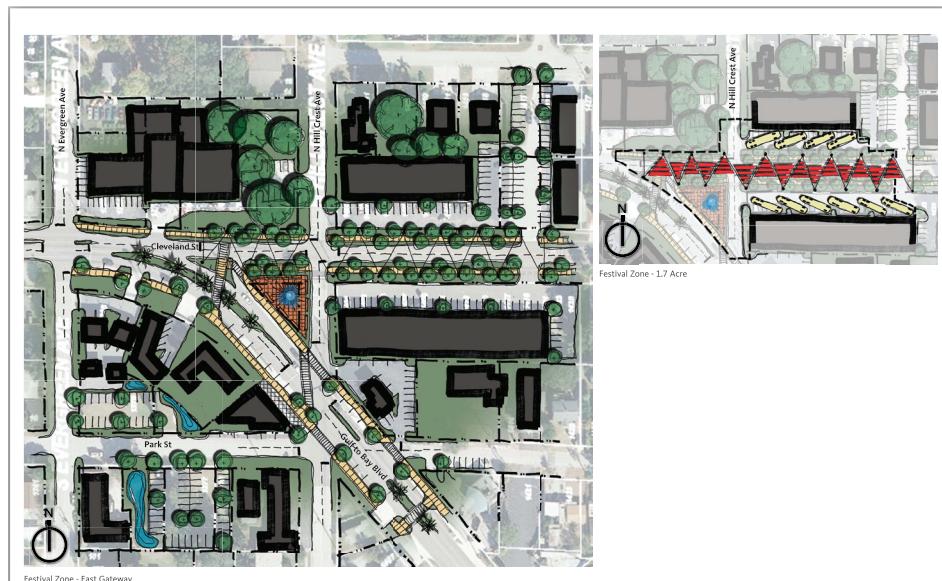
This redevelopment area can be accomplished as an alternate to the streetscape corridor improvements, or offered as a separate redevelopment strategy scheduled and budgeted as funding becomes available. There may also be opportunities available through research for grants and awards for public places or urban open space development within the Community Redevelopment Agency (CRA).

## DEVELOPMENT ZONE IV – FESTIVAL CORE

Alternative event planning, in cooperation with the surrounding business community, incorporates the utilization of the surface parking lots and expands the Festival Core to approximately 1.7 acres that can be used for larger events. The opportunity to use these surface lots for “mobile retailing” (a recently new

concept made popular with the “food truck” concept), allows retailers to come into the community and test the market by establishing a demand for their products and hopefully, start working with Economic Development, to migrate to an available storefront within the district corridor.

Community cooperation, streetscaping and utilization of nearby vacant parcels to add additional parking for these special events will be necessary for the success of future events. These strategies can be realized through the incorporation and adoption of an Overlay District supporting these concepts.



Development Zone IV - Festival Core

City of Clearwater | East Gateway District

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Gensler





# BRAND POSITIONING



## BRAND POSITIONING

Creating a great destination is about unlocking the potential of a place and telling a powerful story that connects with guests at an emotional level, where they will notice, listen, buy, and believe. Brand identity should complement and enhance the vision created in the master plan.

### VISION

It all starts with a community vision. The East Gateway has already taken forward plans to develop the corridor along Cleveland Street and Gulf to Bay by engaging the community in the visioning process. There is a strong core group of passionate residents that, along with City officials, are already making great strides in creating a vision for the East Gateway District.

### APPROACH

We use a holistic approach of architecture, brand strategy, graphic communications, and environmental design. Throughout the master planning process we

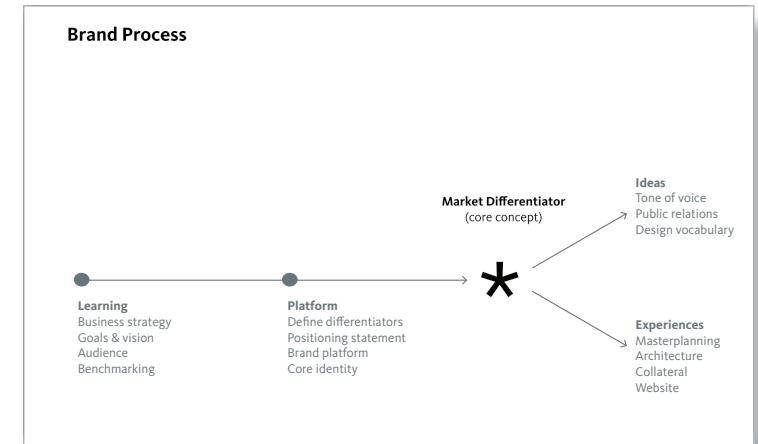
have learned many great stories and have come to understand the community's interests and needs. The community is energized and ready to make changes that will allow the East Gateway District to become a place that people seek out.

### PLACEMAKING

Placemaking is the art and science of creating memorable moments through physical environments. Great places are destinations which have strong identity and deliver desired experiences.

Placemaking starts with the following:

- Pride of place;
- Stewardship of the land;
- Catalyst for change;
- Connectivity;
- Authentic experience;
- Innovative & memorable design; and
- Brand identity



### STORY

We believe that great experiences are based on a series of moments that, when put together, resonate with visitors in a meaningful way. We will create a brand story that tells the complete East Gateway story, provides cohesiveness and is seamless with your vision for the built environment. Our brand story will tell the East Gateway District story in the most engaging, relevant, and memorable way.

We will begin this process by identifying issues unique to the East Gateway so that the story connects with the community. Some areas of interest include the experiences of those from Hidalgo, Mexico, the healthy environment that is promoted from being near the beach, opportunity and stability that can be created with greater business activity, and the prevalence of green space, local events, and the good bones of the building and architectural fabric.

# 8

## POLICY FRAMEWORK



## POLICY FRAMEWORK

Zoning codes have evolved over the years as urban planning theory has changed, legal constraints have fluctuated, and political priorities have shifted. The various approaches to zoning can be divided into four broad categories:

- Euclidean
- Performance
- Incentive
- Form-Based

**Euclidean zoning** codes are the most prevalent in the United States. Euclidean zoning is characterized by the segregation of land uses into specified geographic districts and dimensional standards stipulating limitations on development activity within each type of district. Advantages include relative effectiveness, ease of implementation, long-established legal precedent, and familiarity. However, Euclidean zoning has received criticism for its lack of flexibility and institutionalization of now-outdated planning theories.

The East Gateway District currently operates under the Euclidean form of codes and may not best serve the community during its transitional development and long-term goals. Modification, adoption and/or additions to the Downtown Design Guidelines from the 2004 Clearwater Downtown Redevelopment Plan may assist in the redevelopment process and ease some of the restrictive policies currently controlling the East Gateway District.

**Performance zoning**, also known as “effects-based planning”, uses performance-based, or goal-oriented criteria, to establish review parameters for proposed development projects. Performance zoning is intended to provide flexibility, rationality, transparency and accountability, avoiding the arbitrariness of the Euclidean approach and better accommodating market principles and private property rights with environmental protection. Difficulties include a requirement for a high-level of discretionary activity on the part of the supervising authority. Performance zoning has not been widely adopted in the USA.

**Incentive zoning**, first implemented in Chicago and New York City, is intended to provide a reward-based system to encourage development that meets established urban development goals. The method establishes a base level of limitations and a reward scale to entice developers to incorporate the desired development criteria. Incentive zoning allows a high degree of flexibility but can be complex to administer.

**Form-Based codes** offer considerably more flexibility in building uses than Euclidean codes do. Form-based zoning regulates not the type of land use, but the form that the land use may take. For instance, form-based zoning in a dense area may insist on low setbacks, high density, and pedestrian accessibility.

### CRITICISM OF ZONING LAWS

Much criticism of zoning laws comes from those who see the restrictions as a violation of property rights. It has been argued that zoning boards and city councils can too easily strip property owners of their right to unencumbered use of their land.

## POLICY FRAMEWORK

It has also been argued that zoning laws work against economic efficiency and therefore hinder development in a free economy. A poor zoning restriction could hinder the optimal efficient usage of a given area. Even without any zoning restrictions, a landfill, for example, would likely gravitate to cheaper land rather than being placed in a residential area.

Also, strict zoning laws can get in the way of creative developments, like mixed-use buildings, and can even stop harmless activities like yard sales, community gardens, food truck events and “pop-up” mobile retailing opportunities.

### FORM-BASED CODING

Form-based codes foster predictable built results and a high-quality public realm by using physical form (rather than separation of uses) as the organizing principle for the code. They are regulations, not mere guidelines, adopted into city or county law. Form-based codes offer a powerful alternative to conventional zoning.

Form-based codes address the relationship between building facades and the public realm, the form and mass of buildings in relation to one another,

and the scale and types of streets and blocks. The regulations and standards in form-based codes are presented in both words and clearly drawn diagrams and other visuals. They reference to a regulating plan that designates the appropriate form and scale (and therefore, character) of development, rather than only distinctions in land-use types.

This approach contrasts with conventional zoning's focus on the micro-management and segregation of land uses, and the control of development intensity through abstract and uncoordinated parameters (e.g., FAR, dwellings per acre, setbacks, parking ratios, traffic LOS). Not to be confused with design guidelines or general statements of policy, form-based codes are regulatory, not advisory. They are drafted to implement a community plan. They try to achieve a community vision based on time-tested forms of urbanism. Ultimately, a form-based code is a tool; the quality of development outcomes depends on the quality and objectives of the community plan that a code implements.

### ELEMENTS OF A FORM-BASED CODE

**Regulating Plan:** A plan or map of the regulated area designating the locations where different building form standards apply, based on clear community intentions regarding the physical character of the area being coded.

**Public Space Standards:** Specifications for the elements within the public realm (e.g., sidewalks, travel lanes, on-street parking, street trees, street furniture, etc.)

**Building Form Standards:** Regulations controlling the configuration, features, and functions of buildings that define and shape the public realm.

**Administration:** A clearly defined application and project review process.

**Definitions:** A glossary to ensure the precise use of technical terms.

**Architectural Standards:** Regulations controlling external architectural materials and quality.

## POLICY FRAMEWORK

**Landscaping Standards:** Regulations controlling landscape design and plant materials on private property as they impact public spaces (e.g. regulations about parking lot screening and shading, maintaining sight lines, ensuring unobstructed pedestrian movement, etc.).

**Signage Standards:** Regulations controlling allowable signage sizes, materials, illumination, and placement.

**Environmental Resource Standards:** Regulations controlling issues such as storm water drainage and infiltration, development of slopes, tree protection, solar access, etc.

**Annotation:** Text and illustrations explaining the intentions of specific code provisions.

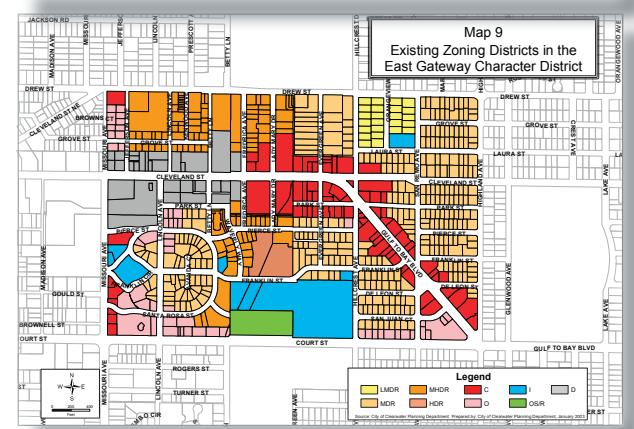
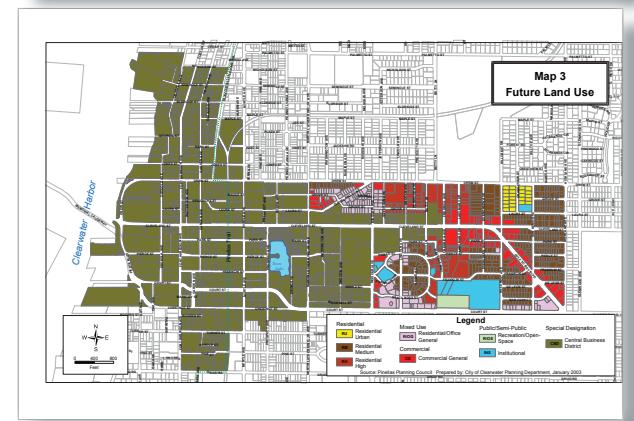
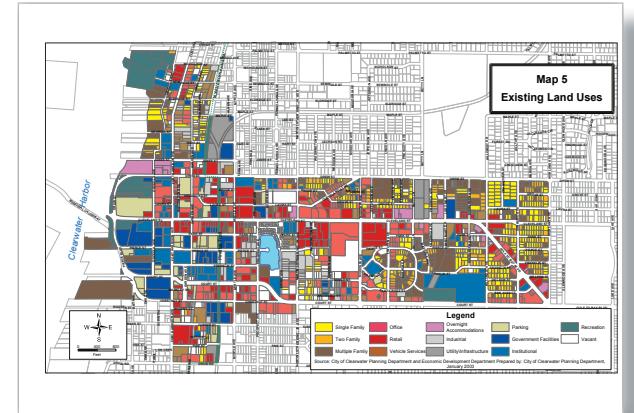
### CURRENT EAST GATEWAY REGULATORY POLICY

In general, the Existing Land Uses for the East Gateway District (see Map 5) are too prescriptive and varied to offer a clear direction as to the vision of the community. The proposed Future Land Use (see Map 3) and operating policy for the District, offers a semblance of uniformity and begins to shape

a directive as to the intent of differing development zones for more definitive range of development types. Still, there are limiting factors to these land uses that may inhibit or deter perspective development opportunities to embark upon the revitalization process, especially over longer periods of time and transitional economies.

The Existing Zoning Districts (see Map 9) reinforce the Future Land Uses (Map 3) in location, geography and parcel designation, and begin to further define the development zones, but also can become restrictive to a broader base of potential opportunities for a struggling economy.

The opportunity to create an Overlay District within the community offers several advantages that can work within the existing policies, but allows greater flexibility and focused opportunities within select areas. The range of policy issues can vary greatly based upon community desires, market conditions, physical opportunities, civic will and administrative resources.



## POLICY FRAMEWORK

Jurisdictional boundaries, or edges, of an Overlay District should be crafted carefully to reflect the greatest potential for opportunity as well as recognize the adjacent properties and their impact or contribution to the overlay. It would be highly recommended, where feasible, that changes in land use, zoning or overlay have separation by right-of-way or green space for transition. One tool to ease the transition from uses, zoning or overlay is the incorporation of form-based regulations.

In our review of the Future Land Use and Existing Zoning District parcels, we identified approximately a dozen parcels that could better serve the community, and possibly the land owners, through a change of land use and zoning categories. Parcels that are of contrary use from the majority of the block configuration or are adjacent to or affronting another use designation could be candidates for change. This comes as a means to “align” uses and parcels to have a clear demarcation of transitions and contribute to the placemaking goals of the community.

Thus, the boundary of a proposed Overlay District would facilitate the coalescing of the regulatory policy. Further research and community involvement will be required to fully develop the range of standards to be formulated and adopted to embrace the physical context, development demand, market conditions and social change to achieve the desired outcome.

### Several policies to be considered for an Overlay District:

**Reduced Parking Requirements:** Based upon a walkable environment, individual developments will be evaluated on a project-by-project basis and proximity. Re-establish parking requirements based upon development needs (i.e. restaurant, retail, office, etc.), and contextual options for other sources for parking (i.e. street parking and community-shared spaces).

**Street Parking Standards:** Through the redevelopment of the streetscape within the district, added parallel or diagonal parking spaces within the public realm will assist in overall parking demands.

**Shared Parking:** Use-associated (business vs. entertainment, daytime vs. nighttime, weekday vs. weekend, etc).

**Parking Partnerships:** Adjacent landowners can work out efficient parking layouts bounded by structured district agreements through an incentive program.

**District Community Parking Contributions:** Business ownership can contribute to a community parking fund to provide off-site resources within walkable proximity (+/- 1000’ – 1350’, less than a 5-minute walk) of their commercial business.

**Lot Line Development Placement:** Designation of minimum and maximum setbacks to primary and secondary streets, as well as side yard requirements for new development.

**Shared Stormwater Retention:** Shared opportunities to have district wide stormwater collection system and real estate set aside for on-site requirements (if required) to create community amenity. (i.e. Town Lake Regional Stormwater District).

## POLICY FRAMEWORK

**Open Space Standards:** With regard to new development, a percentage of open space beyond parking and landscape requirements to create a series or contribution to a series of open space amenities (parks/plaza/courtyards/etc) with the District.

**Café Dining Standards:** Outdoor dining and social gathering standards to enable street activity and ambiance. These standards can include: physical encroachment standards, egress standards, alcohol sales, lighting, landscape, sound, etc.

**District Operating Hours:** Hours of operation; street cleaning; trash pick-up; repairs and maintenance; etc., based on community drivers.

**Transitional Use:** Allowing operating uses to transition throughout the day/week/year in order to capture varying markets segments and seasonal opportunities (i.e. daily: pottery coffee shop-afterschool youth art classes-evening social mixer for gallery showing; seasonal: ice cream shop to pumpkin and Christmas tree sales).

**Mixed-Use Development:** Vertically or horizontally integrated uses that offer greater development advantages as well as expanded daily use timeframes (i.e. ground floor retail, second floor office, third floor residential). Height compatibility to be reviewed as part of context (see elements of form-based codes).

The research, community outreach and formation of an appropriate Corridor Overlay District for the East Gateway CRA should be a high priority in the near-term. The City should take immediate steps to contract with a professional consulting team to work with the City's Planning & Economic Development departments to create a regulatory code for the ease and predictability of a development process designed to incentivize private sector investments within the District. These investments should be compact and clustered where possible to reduce parking and support a walkable pedestrian environment.

# 9



## STRATEGY/RECOMMENDATIONS



**VISION:** AS AN “URBAN EDGE” COMMUNITY, THE EAST GATEWAY DISTRICT OFFERS UN-PARALLELED OPPORTUNITIES NOT FOUND ANYWHERE ELSE IN THE GREATER CLEARWATER AREA. THE DISTRICT HAS ALL THE QUALITIES OF TRADITIONAL NEIGHBORHOOD DEVELOPMENT, LIVE/WORK/PLAY & EDUCATE IN A CULTURALLY DIVERSE SETTING, VIGOROUSLY SOUGHT OUT BY A DEMOGRAPHIC OF YOUNG PROFESSIONALS, FAMILIES AND AGING ADULTS. THROUGH THE CLEVELAND STREET AND GULF TO BAY CORRIDOR ENHANCEMENTS, A STRONG OPEN SPACE CONNECTIVITY STRATEGY FOCUSED ON STEVENSON CREEK, AN EXPANDING COMMERCIAL ANCHOR AT MISSOURI AND CLEVELAND AND THE DEVELOPMENT OF AN IDENTIFIABLE CORE “PLACE” TO CONGREGATE AND CELEBRATE, THIS WALKABLE MIXED-USE COMMUNITY WILL BECOME A DESTINATION FOR AN EMERGING MARKET OF RESIDENTS AND VISITORS ALIKE.

## STRATEGY/RECOMMENDATIONS

The opportunities for the redevelopment of the East Gateway District have been explored, vetted and documented within this Vision Plan. Our recommendations span across several initiatives and geographic areas. These include:

- District Development;
- Create a Vibrant Market;
- Concept Planning Zone I – West Commercial Anchor;
- Concept Planning Zone II – Corridor Development;
- Concept Planning Zone III – Open Space;
- Concept Planning Zone IV – Festival Core;
- Brand Positioning; and
- Policy/Framework

### Process-Driven Results

Throughout this process of research and data collection to understand the existing conditions of the neighborhood, as well as the infrastructure and physical attributes of the District, we came to know the community offerings. Through several meetings with different stakeholder groups, area employer organizations and interested citizens, we gained a sense of the community's aspirations. This revealed that the community strongly endorses the relocation of the social service providers that have been residing within the District for decades. Without this overwhelmingly desired strategy, it is believed that the opportunity for the East Gateway District to become an attractive environment for businesses and residential expansion will be severely hampered. Furthermore, through market data combined with demographic statistics, we learned of opportunities and needs to shape an economic strategy to provide a directive for potential prosperity. We tested and explored planning concepts and ideas to provide a vision of what the community could become. We identified where regulatory enhancements and potential framework policy modifications could create more inviting development conditions to assist

interested parties. All of these strategies, with a targeted re-positioning of the community, can create a brand focused on its potential and its newly identified assets.

The following goals, through a methodical series of strategies and actions implemented over time, can create the environment for community revitalization.

## STRATEGY/RECOMMENDATIONS

### GOAL: DISTRICT DEVELOPMENT

- Change perception and negative influences that impact the community image, attractiveness, safety and redevelopment opportunities.

### GOAL: CREATE A VIBRANT MARKET

- Encourage and support restaurant and shopping destinations focusing on local, unique shops, ideally a combination geared towards both city residents' and tourists' needs.
- Create more foot traffic in the East Gateway District (toward a more walkable community).
- Focus on business development to support local institutions.

## STRATEGY/RECOMMENDATIONS

### GOAL: CONCEPT PLANNING ZONE I

- Focus development near the Missouri Avenue and Cleveland Street intersection as a commercial anchor through a strategic concentrated development initiative.

### GOAL: CONCEPT PLANNING ZONE II

- Create a district corridor along Cleveland Street and Gulf to Bay Boulevard as a “complete street” within a redevelopment district promoting walkability, shared resources and edge conditions for a vibrant community destination.

### GOAL: CONCEPT PLANNING ZONE III

- Develop a north-south connectivity axis of open space and community amenities along the Stevenson Creek drainage basin.

### GOAL: CONCEPT PLANNING ZONE IV

- Create a central gathering place where the community can come together for regularly scheduled events and activities, offering a sense of place and a community destination core.

### GOAL: BRANDING STRATEGY

- Create a strategy to rebrand the East Gateway District as a cohesive vibrant destination community to live, work, recreate and educate. Explore the opportunity of renaming Gulf to Bay Boulevard through the branding process.

### GOAL: POLICY/FRAMEWORK

- Modify to the existing policy/framework to assist in the redevelopment process and ease some of the restrictive or negative policies that currently are controlling the area's growth. Introduce form-based code as a regulatory tool to assist in the redevelopment process.

We believe that these strategies and recommendations will set forth the implementation tools to initiate the Vision plan created by the East Gateway District community.

## STRATEGY/RECOMMENDATIONS DISTRICT DEVELOPMENT

**GOAL:** CHANGE PERCEPTIONS AND NEGATIVE INFLUENCES THAT IMPACT COMMUNITY IMAGE, ATTRACTIVENESS, SAFETY AND REDEVELOPMENT OPPORTUNITIES

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: CONTINUE EFFORTS AND EXPAND OPPORTUNITIES TO ASSIST IN PUBLIC REALM (STREETS AND OPEN SPACE) IMPROVEMENTS</b>					
Action 1: Complete sidewalk program through the residential and commercial zones	City of Clearwater	X			
Action 2: Increase code enforcement sweeps/inspection/activities	City of Clearwater Code Enforcement	X			X
Action 3: Hold a community forum on property maintenance to inform and educate on standards and regulations	City of Clearwater and BNA	X			
Action 4: Relocate dumpsters from streets, offer assistance with enclosure costs and research alternative collection methodology	City of Clearwater Solid Waste		X		
Action 5: Increase penalties and shorten compliance times for code infractions	City of Clearwater Code Enforcement	X	X		

<b>STRATEGY 2: RELOCATION OF SOCIAL SERVICE PROGRAMS TO CONSOLIDATED COUNTYWIDE LOCATION AND ELIMINATION OF TRANSIENT EMPLOYMENT CENTERS</b>					
Action 1: Continue City Administration negotiations with existing social service providers for alternative solutions and locations	City of Clearwater	X			
Action 2: Continue civic persistence working with City Administration to resolve issues in a timely and short-term timeframe	City of Clearwater/BNA	X			
Action 3: Create alliance of day labor employment organizations with the construction industry and other resource industries for alternative locations that support specific trade activities, (i.e. industrial land use locations, etc.)	City of Clearwater	X			

## STRATEGY/RECOMMENDATIONS DISTRICT DEVELOPMENT

**GOAL:** CHANGE PERCEPTIONS AND NEGATIVE INFLUENCES THAT IMPACT COMMUNITY IMAGE, ATTRACTIVENESS, SAFETY AND REDEVELOPMENT OPPORTUNITIES

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: ENCOURAGE AND SUPPORT EXPANDED TRANSIT OPTIONS TO THE DISTRICT</b>					
Action 1: Coordinate potential ridership groups with PSTA officials to determine needs, schedule and stop location options for increased patronage	City of Clearwater and PSTA/Pinellas County	X	X		
Action 2: Create Jolley Trolley ridership programs/incentives for patrons from the downtown business core and the beach to East Gateway attractors (retail and restaurants)	City of Clearwater, Jolley Trolley and BNA	X	X		
Action 3: Coordinate transit opportunities/locations into Cleveland corridor streetscape development for appropriate and attractive integration	City of Clearwater and PSTA/Pinellas County		X		

<b>STRATEGY 4: CREATE BUSINESS-FRIENDLY AND PROFESSIONAL AFFILIATIONS SPECIFICALLY ORIENTED TO EAST GATEWAY OPPORTUNITIES</b>					
Action 1: Form coalition of "like-minded" business alliances to support growth and influence objectives	City of Clearwater and BNA	X			
Action 2: Continue coordination between Economic Development and Housing (EDH) and Planning and Development departments to address and implement development needs/concerns/issues impeding or advancing business objectives	City of Clearwater	X			
Action 3: Research potential revenue sources (dues/fees/assessments) from membership organizations/individuals to fund initiatives and objectives	City of Clearwater and BNA		X		

## STRATEGY/RECOMMENDATIONS DISTRICT DEVELOPMENT

**GOAL:** CHANGE PERCEPTIONS AND NEGATIVE INFLUENCES THAT IMPACT COMMUNITY IMAGE, ATTRACTIVENESS, SAFETY AND REDEVELOPMENT OPPORTUNITIES

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 5: CREATE AND MAINTAIN A SAFE &amp; SECURE ENVIRONMENT THROUGHOUT THE CORRIDOR DEVELOPMENT, NEIGHBORHOODS AND ACTIVITY AREAS</b>					
Action 1: Improve street lighting standards for greater coverage, added safety, and improved appearance	City of Clearwater	X			X
Action 2: Expand crime watch and other community programs	City of Clearwater PD and BNA	X			X
Action 3: Increase patrolling of known problem areas	City of Clearwater and BNA	X			X
Action 4: Installation of campus-style emergency call station at strategic locations	City of Clearwater	X			

## STRATEGY/RECOMMENDATIONS CREATE A VIBRANT MARKET

**GOAL:** ENCOURAGE AND SUPPORT RESTAURANT AND SHOPPING DESTINATIONS FOCUSING ON LOCAL, UNIQUE SHOPS, IDEALLY A COMBINATION GEARED TOWARDS BOTH CITY RESIDENTS' AND TOURISTS' NEEDS

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: ESTABLISH NEW OR IMPROVE RECREATIONAL AREA/ATTRACTI</b> ONS TO CAPTURE INCREASED SPENDING. PLAN TO CAPTURE REASONABLE INCREMENT OF THE \$13.3 MILLION SPENDING IN RETAIL.					
Action 1: Create a customer intercept survey to better understand the existing retail base	City of Clearwater and Chambers of Commerce	X			
Action 2: Conduct further analysis of visitor demand	City of Clearwater	X			
Action 3: Focus brand marketing on those segments identified	Consultant	X			
Action 4: Extend the transportation from the beach to the East Gateway	City of Clearwater, Pinellas County, Jolley Trolley	X	X		

## STRATEGY/RECOMMENDATIONS CREATE A VIBRANT MARKET

### GOAL: CREATE MORE FOOT TRAFFIC IN THE EAST GATEWAY (TOWARD A MORE WALKABLE COMMUNITY)

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: SUPPORT THE ESTABLISHMENT OF BUSINESSES THAT GENERATE FREQUENT VISITS, SUCH AS DRY CLEANERS, RESTAURANTS (PARTICULARLY FOCUSING ON UNIQUE CUISINES AND LOCAL FLAVORS); BUSINESSES GEARED TOWARDS ACTIVITIES OF BOTH VISITORS AND RESIDENTS (I.E. POTTERY STORES THAT HAVE CHILDREN CLASSES OR COFFEE SHOPS WITH WIRELESS INTERNET FOR UMA STUDENTS) SHOULD BE CONSIDERED AS ESSENTIAL TO THE BUSINESS MIX FOR THE AREA</b>					
Action 1: Consolidate/reconcile all demographic/retail data into an online database that can be accessed easily by partners, retailers and brokers via a branded website	City of Clearwater	X			
Action 2: Develop relationships with local and national brokers/tenant reps (via outbound contact and in person at retail industry shows	City of Clearwater	X			
Action 3: Put together a campaign that shows all available (or soon-to-be-available) locations	City of Clearwater, Brokers	X			
Action 4: Develop a schedule of city improvements including schedule for streetscape improvements, gateway, clean and green programs, other infrastructure improvements, façade programs, etc. to provide a basis of momentum that can be used in developing plans by business owners	City of Clearwater	X			
Action 5: Expansion and/or recruitment of restaurants (ie. cafes, outdoor meeting areas, etc.); when possible, include an incentive/program, such as a façade grant or assistance with outdoor furniture and seating space	City of Clearwater	X			X

## STRATEGY/RECOMMENDATIONS CREATE A VIBRANT MARKET

### GOAL: FOCUS ON BUSINESS DEVELOPMENT TO SUPPORT LOCAL INSTITUTIONS

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: ESTABLISHING CO-OP BUSINESSES READY TO PROVIDE SERVICES THAT ARE CURRENTLY USED BY THE ANCHOR INSTITUTIONS BUT OBTAINED FAR AWAY WILL HELP TO GENERATE NEW JOBS AND VIABLE BUSINESSES IN THE AREA WHILE SERVICING LOCAL STAKEHOLDERS</b>					
Action 1: Identify business opportunities within the supply chain of anchor institutions	City of Clearwater	X			
Action 2: Consider the formation of a Main Street program, business or merchant association to support activities	City of Clearwater, Businesses		X		
Action 3: Promote entrepreneurship by publicizing the existing Small Business Development Center; utilize the nonprofit business support organization SCORE ( <a href="http://www.score.org">www.score.org</a> ) to support programming on business development	City of Clearwater,	X			

### GOAL: INCREASE RESIDENTIAL DENSITY

<b>STRATEGY 1: BUILD ON THE TRENDS TOWARD DOWNTOWN LIVING AND THE NEED FOR AFFORDABLE HOUSING TO CREATE WORKFORCE HOUSING OPPORTUNITIES</b>					
Action 1: Work with existing anchor institutions to research and coordinate housing needs	City of Clearwater	X			
Action 2: Promote the financing opportunities offered by the Florida Housing Finance Corporation	City of Clearwater	X			
Action 3: Market the East Gateway District to the development community for urban village housing	City of Clearwater	X			

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE I

**GOAL:** FOCUS REDEVELOPMENT NEAR THE MISSOURI AVENUE AND CLEVELAND STREET INTERSECTION AS A COMMERCIAL ANCHOR THROUGH A STRATEGIC CONCENTRATED DEVELOPMENT INITIATIVE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing

### STRATEGY 1: ACTIVELY SEEK DEVELOPMENT PARTNERSHIPS FOR UTILIZATION OF THE FORMER ECONOMY INN SITE

Action 1: Coordinate with UMA long-term needs regarding real estate/parking/program growth	City of Clearwater	X			
Action 2: Seek development interest in Vision Study market report of retail "leakage", housing opportunities and medical/technology partnerships	City of Clearwater	X			
Action 3: Research market competitors of Nature's Food Patch (Whole Foods/Publix Greenwise/etc.) for support business types for infill opportunities	City of Clearwater and Nature's Food Patch	X			
Action 4: Recruit technology-focused firms to accomplish strategic plan recommendations	City of Clearwater	X			

### STRATEGY 2: DEVELOP ALTERNATE PARKING SCENARIOS FOR SHORT-TERM AND LONG-TERM PARKING STRATEGIES

Action 1: Revise and define short-term and long-term parking opportunities and regulation/design standards	City of Clearwater	X	X	X	
Action 2: Create community (shared) parking program for district participants	City of Clearwater		X		
Action 3: Review and potentially revise parking requirements for "walkable" communities (+/- 1000'-1300' proximity for offsite parking)	City of Clearwater		X		

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE I

**GOAL:** FOCUS REDEVELOPMENT NEAR THE MISSOURI AVENUE AND CLEVELAND STREET INTERSECTION AS A COMMERCIAL ANCHOR THROUGH A STRATEGIC CONCENTRATED DEVELOPMENT INITIATIVE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: PROPERTY ASSEMBLAGE FOR EASE OF DEVELOPMENT FOR UMA CAMPUS OPPORTUNITIES/MAJOR DISTRICT PARKING FACILITY</b>					
Action 1: Assemble current block property owners to discuss current and future utilization, leases, and tenant opportunities	City of Clearwater and property owners	X			
Action 2: Conduct forum w/ development community for interest in UMA "externship" and job placement program to encourage business/industry development and relocation opportunities within the District	City of Clearwater and Developer Industry	X			
Action 3: Acquire parcels as available (or needed) to support redevelopment	City of Clearwater or Interested Developer		X		X

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE II

**GOAL:** CREATION OF A DISTRICT CORRIDOR ALONG CLEVELAND STREET AND GULF TO BAY BOULEVARD AS A “COMPLETE STREET” WITHIN A REDEVELOPMENT DISTRICT PROMOTING WALKABILITY, SHARED RESOURCES, AND EDGE CONDITIONS FOR A VIBRANT COMMUNITY DESTINATION

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: CREATION OF A REGULATORY OVERLAY DISTRICT</b>					
Action 1: Define edges and property boundaries to be included within the Overlay District	City of Clearwater	X			
Action 2: Coordinate for development of the overlay program	City of Clearwater or Planning Consultant	X			
Action 3: Conduct public meeting(s) for community input on desired characteristics of the overlay regulations	City of Clearwater and BNA/SAG	X			
Action 4: Develop shared parking strategies for more efficient parking utilization	City of Clearwater		X		
<b>STRATEGY 2: DEVELOP ALTERNATE SCENARIOS FOR SHORT-TERM PARKING NEEDS</b>					
Action 1: Revise and define short-term parking opportunities and regulation/design standards	City of Clearwater	X			
Action 2: Create community (shared) parking program for district participants	City of Clearwater		X		
Action 3: Review (reduce) parking requirements to accommodate and promote a “walkable” community	City of Clearwater		X		

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE II

**GOAL:** CREATION OF A DISTRICT CORRIDOR ALONG CLEVELAND STREET AND GULF TO BAY BOULEVARD AS A “COMPLETE STREET” WITHIN A REDEVELOPMENT DISTRICT PROMOTING WALKABILITY, SHARED RESOURCES, AND EDGE CONDITIONS FOR A VIBRANT COMMUNITY DESTINATION

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: PROMOTE INFILL DEVELOPMENT FOR DOUBLE-LOADED CORRIDOR (DEVELOPMENT ON BOTH SIDES OF THE STREET)</b>					
Action 1: Concentrate development to complete block development through incentives programs	City of Clearwater		X		
Action 2: Promote adjacent development to expand or share common areas	City of Clearwater		X		
Action 3: Create activity areas such as small plazas, parks or open space as edge enforcement to block development	City of Clearwater		X		
<b>STRATEGY 4: INITIATE CORRIDOR STREETScape PHASE III AND DEVELOP THE MISSOURI AVE. AND CLEVELAND STREET INTERSECTION AS A DISTRICT GATEWAY FEATURE</b>					
Action 1: Appropriate funding as part of the Cleveland Streetscape Phase III prior to 2017 schedule	City of Clearwater	X	X		
Action 2: Conduct public meeting(s) for community input on aesthetics/function/workability	City of Clearwater, BNA/SAG	X	X		
Action 3: Conduct right-of-way survey to determine frontage parcel impacts to parking and other access issues	City of Clearwater Planning/Engineering/Legal	X	X		
Action 4: Engage the Engineering Department for streetscape design	City of Clearwater	X	X		

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE III

**GOAL:** DEVELOPMENT OF A NORTH-SOUTH CONNECTIVITY AXIS OF OPEN SPACE AND COMMUNITY AMENITIES ALONG THE STEVENSON CREEK DRAINAGE BASIN

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: SURVEY AND DOCUMENT THE EASEMENT JURISDICTION, CAPACITY, ACCESS AND LIMITS, AS WELL AS OPPORTUNITIES FOR ENHANCEMENT</b>					
Action 1: Engage consultant or City staff to analyze of basin	City of Clearwater and/ or Planning Consultant	X			

<b>STRATEGY 2: DEVELOP AND COORDINATE THE EAST GATEWAY OPEN SPACE MASTER PLAN TASKS TO PROGRAM, DESIGN AND CONSTRUCT PHASES OVER PREDICATED SCHEDULE</b>					
Action 1: Conduct public involvement forum(s) to thoroughly develop programmatic opportunities and activities desired to be included in the open space network (i.e. community gardens, playground, public art and pedestrian bridges)	City of Clearwater, BNA/SAG, Consultant	X			
Action 2: Develop partnerships with property owners adjacent to the canal to develop mutual benefit understandings and enhance connectivity and shared resources	City of Clearwater, Legal, BNA/SAG		X		
Action 3: Develop operational, maintenance understanding and funding sources for dedicated uses and programming	City of Clearwater, Legal and BNA/SAG		X		
Action 4: Develop implementation schedule for planning, funding and construction for open space program	City of Clearwater, Consultant			X	

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE III

**GOAL:** DEVELOPMENT OF A NORTH-SOUTH CONNECTIVITY AXIS OF OPEN SPACE AND COMMUNITY AMENITIES ALONG THE STEVENSON CREEK DRAINAGE BASIN

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: WORK WITH FLORIDA DEPARTMENT OF TRANSPORTATION FOR COURT AND DREW STREET PEDESTRIAN CROSSINGS FOR SAFE CONNECTIVITY BEYOND THE DISTRICT BORDERS</b>					
Action 1: Identify southern connection from the District to Glen Oaks Park	City of Clearwater FDOT and/or Consultant		X		
Action 2: Identify northern connection from the District onto Drew Street	City of Clearwater FDOT and/or Consultant		X		

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE IV

**GOAL:** CREATION OF A CENTRAL GATHERING PLACE WHERE THE COMMUNITY CAN  
COME TOGETHER FOR REGULARLY SCHEDULED EVENTS AND ACTIVITIES  
OFFERING A SENSE OF PLACE AND A COMMUNITY DESTINATION CORE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: REAPPROPRIATION OF THE RIGHT-OF-WAY ON CLEVELAND STREET EAST OF GULF TO BAY INTERSECTION BASED UPON TRAFFIC COUNT REDUCTIONS</b>					
<b>Action 1:</b> Survey public realm to determine City ownership boundaries and frontage parcel impacts to parking and other access issues	City of Clearwater and/or consultant	X			
<b>Action 2:</b> Assist adjacent property owners with parking lot planning through an incentive program	City of Clearwater and/or Consultant		X		
<b>Action 3:</b> Provide additional access to Cleveland as new city right-of-way assisting in access/egress to festival area	City of Clearwater Traffic, Legal, and/or consultant		X		

<b>STRATEGY 2: STREETSCAPE DESIGN BASED UPON DISTRICT NEEDS AND REDUCED TRAFFIC REQUIREMENTS</b>					
<b>Action 1:</b> Seek consultant or City-developed design	City of Clearwater and/or Consultant		X		
<b>Action 2:</b> Develop public involvement strategy to assist in programming of events and activities	City of Clearwater, BNA/SAG, and/or Consultant		X		
<b>Action 3:</b> Plan redevelopment with adequate infrastructure to support community events with power, structure, communications sound and support for minimal disruption and ease of event preparation	City of Clearwater and/or Consultant		X		

## STRATEGY/RECOMMENDATIONS CONCEPT PLANNING ZONE IV

**GOAL:** CREATION OF A CENTRAL GATHERING PLACE WHERE THE COMMUNITY CAN  
COME TOGETHER FOR REGULARLY SCHEDULED EVENTS AND ACTIVITIES  
OFFERING A SENSE OF PLACE AND A COMMUNITY DESTINATION CORE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: ACQUIRE TRIANGULAR CAR RENTAL PROPERTY AS FOCAL POINT AT CROSSROADS FOR COMMUNITY ICONIC FEATURE</b>					
Action 1: Purchase real estate for public amenity through TIF sources or other funding	City of Clearwater		X		
Action 2: Seek Request for Proposals for public art resource for development of iconic feature	City of Clearwater		X		

STRATEGY 4: DEVELOP APPROPRIATE REGULATORY SUPPORT TO ALLOW THE GREATEST VARIETY OF EVENTS AND ACTIVITIES FOR COMMUNITY INTERACTION AND ECONOMIC OPPORTUNITY					
Action 1: Identify multiple use options, street closures, timeframes and scheduling for greatest flexibility		City of Clearwater			
Action 2: Identify nearby vacant parcels for festival/event parking		City of Clearwater		X	
Action 3: Identify funding sources (grants, endowments, naming rights, etc.) to sustain activity, events, operations and management		City of Clearwater		X	

## STRATEGY/RECOMMENDATIONS BRAND STRATEGY

**GOAL:** CREATION OF A STRATEGY TO RE-BRAND EAST GATEWAY DISTRICT  
AS A COHESIVE VIBRANT DESTINATION COMMUNITY TO LIVE,  
WORK, RECREATE AND EDUCATE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: CREATION OF A BRANDING VISION TO UNLOCK THE POTENTIAL OF THE EAST GATEWAY DISTRICT</b>					
Action 1: Solicit and contract with a Branding Design consultant to create strategy, approach and graphics	City of Clearwater	X	X		
Action 2: Engage the community in the branding process	BNA/SAG and Consultant	X	X		
Action 3: Complement and enhance the vision created in the master plan	BNA/SAG and Consultant	X	X		

<b>STRATEGY 2: DEVELOP A "PLACEMAKING" STRATEGY BY CREATING MEMORABLE MOMENTS THROUGH PHYSICAL ENVIRONMENTS</b>					
Action 1: Discover those community destinations which have strong identity and deliver desired experiences	BNA/SAG and Consultant		X		
Action 2: Develop opportunity and stability that can be created with greater business activity	BNA/SAG and Consultant		X		
Action 3: Promote stewardship of the environment, both natural and man-made	BNA/SAG and Code Enforcement	X			

## STRATEGY/RECOMMENDATIONS BRAND STRATEGY

**GOAL:** CREATION OF A STRATEGY TO RE-BRAND EAST GATEWAY DISTRICT  
AS A COHESIVE VIBRANT DESTINATION COMMUNITY TO LIVE,  
WORK, RECREATE AND EDUCATE

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: DEVELOP A BRAND STORY THAT TELLS THE EAST GATEWAY DISTRICT STORY IN THE MOST ENGAGING, RELEVANT, AND MEMORABLE WAY</b>					
Action 1: Identify issues and opportunities unique to the East Gateway that connect with the community	BNA/SAG and Consultant	X			
Action 2: Develop storylines around great experiences that are based on a series of moments that when put together resonate with VISITORS in a meaningful way.	BNA/SAG and Consultant	X			

<b>STRATEGY 4: CHANGE OF IDENTITY TO SUPPORT THE BRAND THROUGH MORE APPROPRIATE NAMING OF STREETS, PLACES, AREAS AND NEIGHBORHOODS</b>					
Action 1: Develop community support for identification of designated changes (i.e. place, street, area, etc.)	BNA/SAG and Consultant	X			
Action 2: Naming concepts that reflect brand, place, community and core values that emerge through the branding strategy	BNA/SAG and Consultant	X			

## STRATEGY/RECOMMENDATIONS POLICY/FRAMEWORK

**GOAL: POLICY/FRAMEWORK MODIFICATIONS TO ASSIST IN THE REDEVELOPMENT PROCESS TO EASE SOME OF THE RESTRICTIVE OR NEGATIVE POLICIES CURRENTLY CONTROLLING THE AREA**

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 1: THOROUGH REVIEW OF THE POLICIES AND PROCEDURES GOVERNING THE EAST GATEWAY DISTRICT FOR RECOMMENDED CHANGES</b>					
Action 1: Delete the language of CDRP* East Gateway Policy #3 and Strategy #28 which supports the expansion of the CHIP facility as a campus	City of Clearwater	X			
Action 2: Encourage the implementation of CDRP* East Gateway Policy #9 to expand Commercial and Downtown zoning to Cleveland Street and Gulf to Bay Boulevard	City of Clearwater	X			
Action 3: Discourage the development and use of any of the public right-of-way for perpendicular parking where stalls have direct access to the travel lanes	City of Clearwater	X			

\*Clearwater Downtown Redevelopment Plan

<b>STRATEGY 2: MORE APPROPRIATE REGULATORY FRAMEWORK TO IMPLEMENT AN OVERLAY DISTRICT TO SERVE THE REDEVELOPMENT PROCESS ALONG THE CLEVELAND STREET AND GULF TO BAY CORRIDORS</b>					
Action 1: Research best practices and policies beneficial to the East Gateway community, as well as serve in the redevelopment process	City of Clearwater	X			
Action 2: Solicit the consultation of appropriate professionals (City or consultant) to draft overlay amendments for the corridor	City of Clearwater		X		
Action 3: Craft edges of an Overlay District to reflect the greatest potential for development opportunity and study the adjacent properties and their impact or contribution to the overlay	City of Clearwater and/or consultant		X		
Action 4: Review potential of the CDRP* with modifications to extend to serve the East Gateway District corridor development	City of Clearwater		X		
Action 5: Implement code revisions/modifications to support appropriate signage and display graphics	City of Clearwater		X		

## STRATEGY/RECOMMENDATIONS POLICY/FRAMEWORK

**GOAL:** POLICY/FRAMEWORK MODIFICATIONS TO ASSIST IN THE REDEVELOPMENT PROCESS TO EASE SOME OF THE RESTRICTIVE OR NEGATIVE POLICIES CURRENTLY CONTROLLING THE AREA

Actions	Responsible Parties	Timeframe			
		Short-Term (1-3 years)	Mid-Term (4-7 years)	Long-Term (7+ years)	Ongoing
<b>STRATEGY 3: INVESTIGATE THE OPTION OF A FORM-BASED CODE FOR THE EAST GATEWAY DISTRICT TO EASE RESTRICTIONS OF USE-ORIENTED POLICIES AND SUPPORT A WIDER BASE FOR ECONOMIC OPPORTUNITY</b>					
Action 1: Address the relationship between building facades and the public realm, the form and mass of buildings in relation to one another, and the scale and types of streets and blocks	City of Clearwater and/or consultant			X	
Action 2: Require regulations and standards in form-based codes are presented in both words and clearly drawn diagrams and other visuals	City of Clearwater and/or consultant			X	

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## APPENDIX

SEE DOCUMENT II

