

Manatee County Florida

March 17–22, 2013



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Economic Prosperity and Strategic Growth

March 17–22, 2013

About the Urban Land Institute

THE MISSION OF THE URBAN LAND INSTITUTE is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. ULI is committed to

- Bringing together leaders from across the fields of real estate and land use policy to exchange best practices and serve community needs;
- Fostering collaboration within and beyond ULI's membership through mentoring, dialogue, and problem solving;
- Exploring issues of urbanization, conservation, regeneration, land use, capital formation, and sustainable development;
- Advancing land use policies and design practices that respect the uniqueness of both built and natural environments;
- Sharing knowledge through education, applied research, publishing, and electronic media; and
- Sustaining a diverse global network of local practice and advisory efforts that address current and future challenges.

Established in 1936, the Institute today has nearly 30,000 members worldwide, representing the entire spectrum of the land use and development disciplines. Professionals represented include developers, builders, property owners, investors, architects, public officials, planners, real estate brokers, appraisers, attorneys, engineers, financiers, academics, students, and librarians.

ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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About ULI Advisory Services

THE GOAL OF ULI'S ADVISORY SERVICES program is to bring the finest expertise in the real estate field to bear on complex land use planning and development projects, programs, and policies. Since 1947, this program has assembled well over 400 ULI-member teams to help sponsors find creative, practical solutions for issues such as downtown redevelopment, land management strategies, evaluation of development potential, growth management, community revitalization, brownfield redevelopment, military base reuse, provision of low-cost and affordable housing, and asset management strategies, among other matters. A wide variety of public, private, and nonprofit organizations have contracted for ULI's advisory services.

Each panel team is composed of highly qualified professionals who volunteer their time to ULI. They are chosen for their knowledge of the panel topic and screened to ensure their objectivity. ULI's interdisciplinary panel teams provide a holistic look at development problems. A respected ULI member who has previous panel experience chairs each panel.

The agenda for a five-day panel assignment is intensive. It includes an in-depth briefing day composed of a tour of the site and meetings with sponsor representatives; a day of hour-long interviews of typically 50 to 75 key community representatives; and two days of formulating recommendations. Long nights of discussion precede the panel's conclusions. On the final day on site, the panel makes an oral presentation of its findings and conclusions to the sponsor. A written report is prepared and published.

Because the sponsoring entities are responsible for significant preparation before the panel's visit, including sending extensive briefing materials to each member and arranging for the panel to meet with key local community members and stakeholders in the project under consideration, participants in ULI's five-day panel assignments are able to make

accurate assessments of a sponsor's issues and to provide recommendations in a compressed amount of time.

A major strength of the program is ULI's unique ability to draw on the knowledge and expertise of its members, including land developers and owners, public officials, academics, representatives of financial institutions, and others. In fulfillment of the mission of the Urban Land Institute, this Advisory Services panel report is intended to provide objective advice that will promote the responsible use of land to enhance the environment.

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Acknowledgments

ON BEHALF OF THE URBAN LAND INSTITUTE, the panel would like to thank the Manatee County Board of County Commissioners for allowing the panel to be a part of the *How Will We Grow?* process. In addition, the panel thanks Ed Hunzeker, John Osborne, Kathleen Thompson, and all of the Manatee County staff involved in planning and executing the panel. The panelists also extend their gratitude to all of the interviewees who contributed time and insights to this process.

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Introduction and the Panel's Assignment

LOCATED ON FLORIDA'S GULF COAST, Manatee County comprises the southern rim of Tampa Bay. The county's land area is predominantly unincorporated and under the unincorporated county government's jurisdiction and management. Six incorporated jurisdictions lie within Manatee County. The cities of Anna Maria, Bradenton Beach, and Holmes Beach and the town of Longboat Key are all located on the Gulf of Mexico's barrier island. Other incorporated areas include the city of Palmetto and the city of Bradenton, the county seat and largest municipality.

The ULI panel was invited by the Manatee County Board of County Commissioners to review and comment on a report titled *How Will We Grow? A Conversation with the Community*. The panel was asked to examine growth patterns with respect to ascertaining strategies that will yield the highest impact and return on investment in light of the county's goals of economic diversity, employment growth, and place making.

Geography and Demographics

Manatee County's total area is 893 square miles, which includes 150 square miles of gulf, bays, streams, rivers, and lakes. Unincorporated Manatee County comprises just over 741 square miles of land area and had a population of approximately 247,309 (out of a total 327,900 population for the entire county) in 2010. Natural resources have long served as important drivers of population growth.

From 2000 to 2010, population growth within the county increased by over 22 percent. This rate surpasses the state of Florida's overall rapid population growth rate during the same period by almost 5 percent. In 2010, Manatee County had 135,729 households, averaging 2.34 persons in size, with the total number of all households growing by 20 percent since 2000—a rate slightly lower

than Florida's as a whole. The difference is attributable to the area's popularity among retirees. Population maps indicate that much of that growth has been concentrated in greenfield developments east of Interstate 75, especially in the Lakewood Ranch area, a master-planned community located near the southern county line shared with Sarasota County.

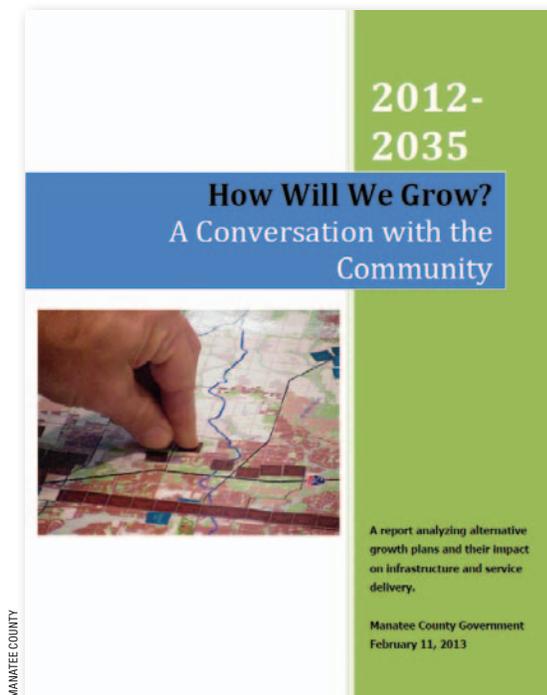
How Will We Grow?

Manatee County, like the other counties in Florida's Tampa Bay region, was hit hard by the 2007–2010 economic downturn. The population growth described previously, coupled with leaner economic times, impelled the board of county commissioners to embark on a regional visioning

Area map.



The Manatee County government released *How Will We Grow?* in February 2013 as the kickoff to a community-wide conversation about growth and the future of the county.



process to create a blueprint from which to focus capital investments and policy direction that will serve to stimulate economic growth and revitalization. The panel was proud to be a part of the *How Will We Grow?* process and hopes its report—which evolved from a series of questions from county leadership about achieving more effectiveness from infrastructure investments and urban development policies in light of budgetary and economic concerns—will help the county achieve its goals.

In the words of the briefing book provided to the panel by county staff, the board of county commissioners “challenged staff to look at land use and infrastructure planning differently—through the eyes of an accountant.” Density appears to be a particularly controversial topic in Manatee County, many of whose citizens have long identified with a suburban or rural lifestyle. In closely examining connectivity, density, and infrastructure investments and their relationship to economic opportunity, county staff has launched a long-term visioning effort that the panel believes will have an enormous positive impact on the future of Manatee County. The panel lauds the detailed professional work that is the basis for *How Will We Grow?*

The three alternatives for growth that are detailed in the report have been discussed in a series of many public meetings that take into account projects already entitled and vacant properties already served by utilities. Alternative 1 is a “business-as-usual” plan that presumes the Comprehensive Plan and the Land Development Code remain essentially “as-is,” with currently entitled projects built out as approved. Alternative 2 seeks to refocus the Comprehensive Plan and Land Development Code to achieve denser growth and infill to derive the most impact from current and future infrastructure investments. This alternative uses the county’s southwest quadrant, with its many existing amenities and attractors, as the focal point for infill and perhaps denser growth. Finally, Alternative 3 takes an activity center approach to growth, focusing new development on already growing areas such as Parrish, Lakewood Ranch, and the area around Port Manatee.

The Panel’s Assignment

In light of the county commission’s desire to take an in-depth look at the *How Will We Grow?* report and the possible implementation steps that will emerge from it, the ULI panel was invited to evaluate the alternatives presented in the report, and to suggest additional issues to consider, if relevant. Specifically, the panel was asked to address the following questions related to future growth and economic sustainability for the county.



At the end of the week, the ULI panelists presented their findings to a group of key county staff, including County Executive Ed Hunzeker, before returning to present the recommendations at a public meeting.

- Based on demographics, land economics, and market projections and trends, which type of “best place” fits for the future of Manatee County and what needs to be done to achieve it?
- What development patterns are successful in increasing the efficiency of infrastructure?
- Are there development patterns and products that better align with trends and economic activities in the region?
- Are there development patterns, types of development, or activities that may complement or encourage targeted industries?
- What incentives for redevelopment should be implemented?

As it spends millions of dollars on infrastructure replacement in areas with dwindling property values, what can the county do to get a better return on the investment in these areas?

Summary of Recommendations

With the parameters of the assignment in mind, the panel has made a series of recommendations that are summarized below and discussed in more detail throughout this report.

- All three alternatives are applicable, in general, with Alternative 2 being the most appropriate to achieve the county’s goals and objectives.
- *How Will We Grow?* is a solid platform from which to create detailed plans, policies, and implementation strategies for each of the county’s four geographic sectors—Southwest/Bradenton, Port Manatee/Palmetto, Parrish, and Lakewood Ranch.
- Partnerships with the Manatee County School Board and area universities should be pursued to improve outcomes and focus curriculum, knowledge, and skills on 21st-century jobs in sports, aviation, medicine, the arts and sciences, and supportive careers.
- The county should invest in detailed market studies to help it identify specific strategies for targeted investment at the K–12 and college levels to align educational opportunities with 21st-century employment, and to focus investment that stimulates reinvestment in existing urban areas.
- IMG Academy’s international reputation should be leveraged to “brand” Manatee County as the sports training capital of America.
- The sports brand should be extended to medicine by attracting specialized sports injury treatment, rehabilitation, and performance enhancement medical practices and facilities.
- Infrastructure investment should be focused in the Southwest/Bradenton sector.
- Immediate action should be taken to consolidate and expand current community redevelopment areas (CRAs) to capture the substantial value that will be created in the Southwest/Bradenton sector.

Generally, the panel strongly encourages following the recommendation of renowned American architect and urban designer Daniel Burnham: “Make no little plans; they have no magic to stir men’s blood.”

Market Analysis

UNDERSTANDING DEMOGRAPHIC and socioeconomic trends affecting growth in Manatee County is critical to understanding and determining how the county will evolve over the next ten to 20 years. Identifying areas and determining the likelihood of potential future growth are also imperative for planners and economic policy makers. Successful urban planning, land use, and development policy can best be described as public action that generates a desirable, widespread, and sustainable private market reaction. Therefore, the following market analysis represents baseline projections of future growth that Manatee County can take steps to improve or impede. In this analysis, the panel began by looking at the larger six-county Tampa Bay Metropolitan Statistical Area (MSA), then isolating Manatee County, and finally subdividing the county into four geographic regions, each of which has its own unique market characteristics.

Tampa MSA Economic Base

Manatee County is part of the six-county Tampa Bay MSA, which consists of Hillsborough, Pasco, Pinellas, Hernando, Manatee, and Sarasota counties. At present, the MSA has a population of approximately 3.5 million living in 1.4 million households. The Tampa region has grown by approximately 54,700 people and 21,800 households annually since 1990, and by 68,700 people and 26,680 households annually since 2000. Seasonal housing units represent approximately 6.7 percent of the total housing stock in the Tampa MSA.

In regard to employment, the Tampa MSA has an employment base of 1.9 million people, and major employers include education, military (MacDill Air Force Base), banking, and health care. Since 1980, the area has added roughly 31,512 jobs annually and since 2002 has added just over 10,000 jobs annually. As mentioned earlier, the

area was hit very hard by the recent recession and lost approximately 191,000 jobs between 2008 and 2010. However, it has begun to recover, adding roughly 41,534 new jobs in 2012. Over the next decade, the six-county area is projected to add about 29,500 new jobs per year through 2023. This increase in employment will fuel population growth of nearly 63,000 and household growth of 24,340 per year through 2023. However, if the projected job growth in the region serves as any indication, the Tampa MSA will not recover to previous historical employment highs (from 2007) for another 4.5 years.

Manatee County Economic Base

On the county level, Manatee County has a 2013 population of 331,400 residents living in 139,537 households, representing approximately 9.5 percent of the total six-county population and 9.8 percent of the area's households. Population and household growth in the county has remained relatively steady since 1980, with an average of 5,500 new residents and 2,350 new households per year. Since 2000, the county has had average growth of 5,200 persons and 2,100 households annually. Seasonal housing is slightly higher (on a percentage basis) in Manatee County, as seasonal housing units represent 11.1 percent of the total housing stock in the county.

Employment in Manatee County was also hit hard by the recent recession: the county lost approximately 26,000 jobs between 2008 and 2010, representing 13.6 percent of the total jobs lost in the Tampa MSA (even though the county contains only 8.4 percent of the workforce). The area has started to recover, with a combined 5,000 jobs added in 2011 and 2012. And over the next decade, job growth for Manatee County is projected to total just under 3,000 new jobs annually, which is on par with historical job growth. However, on the basis of these employment

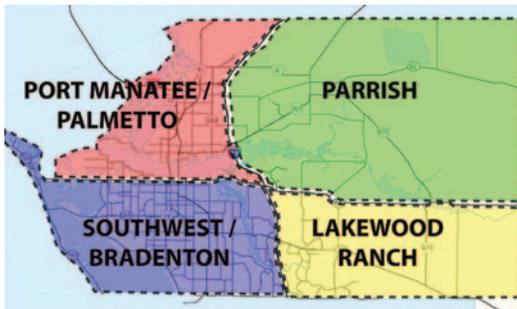


IMG ACADEMIES

projections, it will take the county nearly seven years to return to employment highs that were previously reached in 2007. In regard to industry types, health care is expected to be the largest driver in the local economy, with an additional 715 new health care positions anticipated annually through 2023, representing 24 percent of total employment growth.

Manatee County Market by Submarket

The four submarkets of Manatee County—Port Manatee/Palmetto, Lakewood Ranch, Southwest/Bradenton, and Parrish—have many distinguishing economic characteristics, but they also have many common qualities that, taken together, suggest powerful marketing and branding themes. Individual characteristics identified by the panel are described in this section of the report. Common themes and identities are illustrated in the graphic at the top of the next page.



Manatee County as split into four submarkets: Lakewood Ranch, Parrish, Port Manatee/Palmetto, and Southwest/Bradenton.

Quite importantly, Manatee County, along with adjacent counties (Hillsborough, Pinellas, and Sarasota), is developing a substantial international reputation. The Sarasota-Bradenton International Airport and Port Manatee are obvious contributors to this, though both could be more aggressively marketed and developed. In addition,

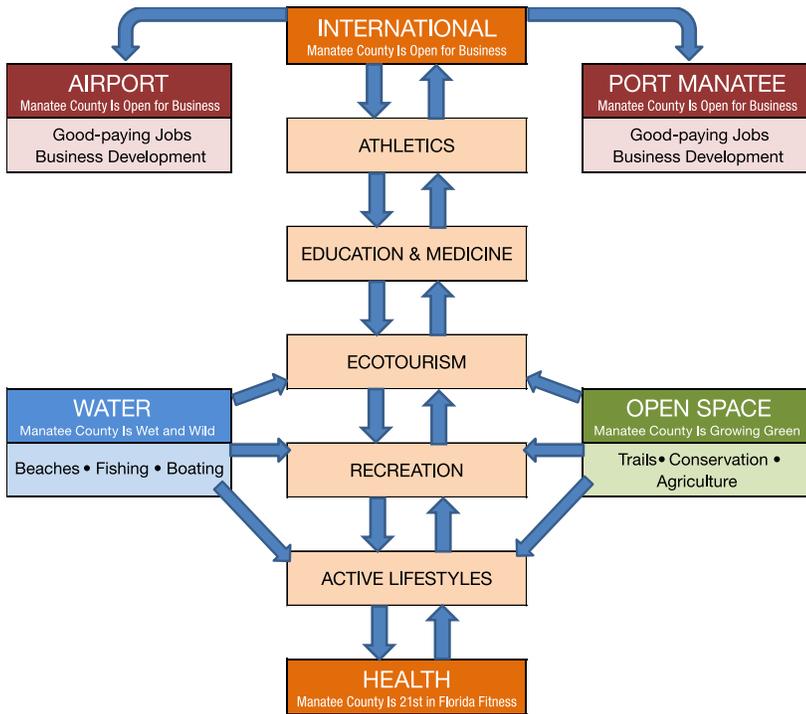
Manatee and Sarasota counties are increasingly part of international athletics, particularly in rowing and related water sports and in sports medicine and training.

The sports medicine and training theme is best represented by the continued growth of IMG Academy, with its intense training, sports injury rehabilitation, and sports medicine programs catering to both professional and amateur athletes from all over the world. As a world-class institution, however, IMG is not isolated. It is situated in an area that also includes the major higher educational institutions of the New College of Florida, the University of South Florida, and the State College of Florida. And all of these coexist virtually alongside the Ringling Museum and the Ringling School of Art and Design and FSU's Asolo Theatre. These give Manatee County not only an international theme, but also a reputation for diverse and commanding advanced education.

Manatee County has long been an attraction for vacationers and retirees because of its astounding waterfronts and beautiful natural areas. These, too, contribute to the county's international importance, but they also represent fundamentals of healthy lifestyles where residents and visitors partake in physical activity that combines an enjoyment of natural features with healthier minds and bodies. Such lifestyles are, of course, consistent with the more intense physical activity represented by IMG, rowing and other water sports, and related athletic endeavors. The ULI panel urges Manatee County to better incorporate the potential for healthier lifestyles into the design and function of its roadway network and related aspects of day-to-day life.

As the diagram on the next page indicates, Manatee County combines international development opportunities with healthy and active lifestyles in an environment that includes diverse water environments (ocean, rivers, bays, lakes) and massive rural and conservation areas. This combination of assets positions Manatee County for greater economic performance, but it also challenges the

Left to right: The Ringling Museum of Art, the Asolo Theatre, and IMG Academy are all significant regional assets for Manatee County.



This diagram illustrates the common themes and identities that emerge from each district, and the county as a whole.

county to develop and redevelop using sustainability practices that protect the natural environment, ensure equal opportunity, and increase per-capita prosperity.

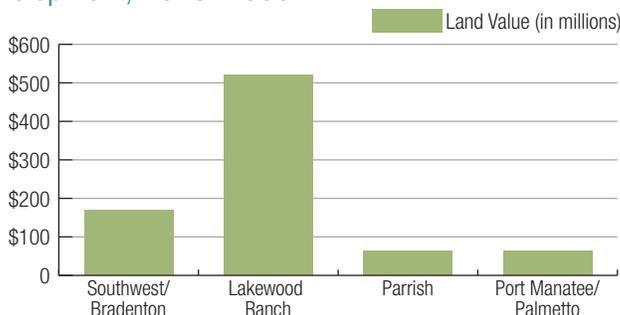
General Real Estate Demand

The panel examined historical growth patterns and projected trends to determine the demand for single-family detached, single-family attached, multifamily rental apartments, office, medical office, retail, industrial/flex/R&D, and hotel uses for the county over the next 20 years. Through 2033, there will be a total demand for:

- 26,388 single-family detached units on 8,795 acres;
- 8,073 single-family attached units on 1,009 acres;
- 13,804 multifamily rental apartments on 920 acres;
- 4.3 million square feet of office space on 331 acres;

By 2033, values in the Lakewood Ranch area will be higher than those in the rest of Manatee County's submarkets combined.

Manatee County Projected Land Values for Real Estate Development, 2013–2033



- 1.5 million square feet of medical office space on 137 acres;
- 3.6 million square feet of retail space on 377 acres;
- 12.2 million square feet of industrial space on 700 acres; and
- 3,056 hotel rooms on roughly 77 acres.

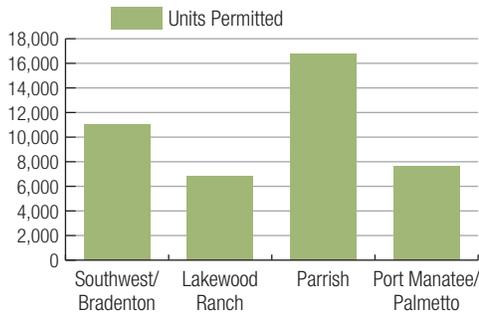
Next, the panel allocated the demand for the county to each of the four submarkets by examining historical growth patterns and synthesizing this with projected growth for each of the four regions. By interviewing local brokers and developers, the panel was then able to obtain current pricing for residential, retail, office, industrial/flex, and hotel land within each of the four submarkets to determine residential land development values for those submarkets.

As shown in the table below, the highest value for real estate development will be generated in the Lakewood Ranch submarket, with a projected development value of \$520 million over the next 20 years. The Southwest/Bradenton submarket will have a projected real estate land development value of \$170 million over the next 20 years, while Parrish and Port Manatee/Palmetto will have a projected development value of \$63.7 million and \$63.5 million, respectively, over the next 20 years. It is important to note that these values are for land development only and do not include the actual building value.

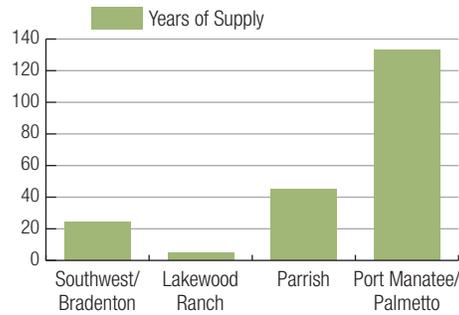
Furthermore, when one compares the amount of approved permits that Manatee County provided for each of the four submarkets with projected residential demand within each submarket, there is a vast oversupply of permits and infrastructure in the Port Manatee/Palmetto submarket. This submarket currently has roughly 7,648 approved residential units; but with a demand for only 60 new units per year, the current permitted supply is approximately 133 years.

In addition, the Lakewood Ranch has a permitted supply of 6,869 residential lots/units; with an annual demand for 1,415 new units, this equates to a 4.9-year supply of units/lots. This is illustrated in the graphs on the facing page.

Manatee County Current Permitted Residential Lots by Submarket



Years of Permitted Residential Supply Given Current Market Conditions



When the number of permitted lots in each submarket is cross-referenced with market conditions, it becomes evident that a mismatch between existing permitted lots and demand may exist.

Countywide Assets

While specific assets of and opportunities for the four submarkets are discussed later in this section of the report, there are a number of assets that are relevant to the entire county and should be treated as such.

Sports. The panel recommends that the county work to brand itself as the sports and recreational capital of Florida. This should be an increasingly easy effort that piggybacks on the expansion of the IMG Academy, the growth of other sports, and the county's status as the winter home of the Pittsburgh Pirates.

The presence of the Pittsburgh Pirates and McKechnie Field should be used for leverage. The county should also consider attracting private companies as well as colleges and universities for baseball training camps in the off-season and during the summer. Working with IMG to develop complementary and like programming that caters to different market segments might also be an option for the county to consider. Development should be focused

surrounding McKechnie Field, with an emphasis on strong connections to downtown hotels, housing, restaurants and services. The panelists also suggest working with private partners to develop dormitories and facilities in under-used and blighted areas surrounding the stadium. On the basis of the resources they saw, the panelists believe the county should actively seek to attract the following sports: baseball, soccer, rowing, sailing, boating, biking, hiking, running, horseback riding, swimming, among others. All of these can or do have a tie-in with IMG and the county's current facilities and natural environment.

All sports should be tied into education, with specific sports training and education beginning in public schools and continuing into college or leading to IMG-level training.

The county's parks department should be encouraged to seek public/private partnerships to help it finance, develop, and maintain a diverse array of specialized sports facilities that build and burnish the brand of "sports capital of Florida."

Sarasota: One of Manatee County's Greatest Assets

Sarasota County has a brand known worldwide. That brand is art, higher education, beautiful beaches, and a casually elegant lifestyle. What is important to understand is that most of the elements that contribute to Sarasota's brand are also located in Manatee County. The Sarasota-Bradenton International Airport is mostly located in Manatee County. Yet during the panel interviews, virtually no one discussed the proximity of the world-class art museum, theater, and renowned training facilities for actors and artists. Thus, the panel recommends that the county actively market its proximity to these assets.



The Ca' d'Zan Mansion is one of Sarasota County's many cultural assets on which Manatee County and the Sarasota-Bradenton International Airport could capitalize.

McKechnie Field, home to the Pittsburgh Pirates' spring training activities, draws tourists and activity to downtown Bradenton.



Likewise, a partnership with IMG and similar entities should exist to create gateways and improvements to roads and neighborhoods with distinct high-quality signage, landscaping, strict code enforcement, and identity of place.

Medicine. The panel understands that one of the largest job growth sectors in Manatee County over the next ten years will be the medical sector. The panel encourages the county to embrace the medical community and work with it to facilitate the county's expansion of specialty medical services into sports medicine, rehabilitation, and performance enhancement. The panelists also suggest engaging with IMG and the Lake Erie College of Osteopathic Medicine (LECOM) medical schools to develop such treatment centers and become a center for education with local hospitals.

The panel feels that sports medicine should be concentrated in the southwest part of the county to continue to anchor this geographic area and grow a critical mass that will accelerate redevelopment in those areas that offer

Manatee County's many waterways should be thought of as recreational assets that can be strategically used to promote an outdoor lifestyle concept to attract both visitors and new residents.



additional opportunities for infill housing and supportive business.

Creeks, Canals, and Floodplains. The panel applauds the development of Bradenton's Downtown Riverwalk as both a catalyst and a vision that has increased demand for more waterfront access, recreation, and scenic enjoyment. Property values have also increased around this investment.

The panel encourages the county to develop comprehensive plans for the recreational development of all its rivers, creeks, canals, and floodplains into a cohesive system of interconnected linear parks that also have bike and pedestrian paths. If the water's edges are used as parks and paths, the incidence as well as the severity of flooding can be minimized while creating a myriad of opportunities for runners, bikers, walkers, and passive users to enjoy. Likewise, preservation of these areas as waterways maintains wildlife habitat and the natural systems where flooding naturally occurs. This approach minimizes costs from flooding, lowers insurance premiums, and generally drives down the cost of doing business in Manatee County—all while enhancing economic development opportunities and quality of life.

The panel encourages the county to develop policies and practices that allow for uninterrupted public access to and use of the waterfront on the ocean, bays, and rivers. Although Manatee County is surrounded, bisected, and penetrated by water across all its areas, there is scant access to water frontage for recreation and enjoyment. The county has a once-in-a-lifetime opportunity to do what other communities wish they had done—aggressively—to obtain as much public access to water frontage as possible. This can be achieved through barter, trade, purchase, lease donation, and other nonmonetary means. A comprehensive strategy, detailed plan, and funding mechanism should be developed. Special emphasis should be given to developing access to currently developed areas so as to ensure that all areas are linked and accessible.

Port Manatee/Palmetto Area

The northeast submarket—which the panel has dubbed “Port Manatee/Palmetto”—has two substantial assets that are included in that name.

Palmetto is a long-established city that is subject to its own planning and development regulations, but which also has the governance and economic structure to adapt to new and changing socioeconomic opportunities. Assets like its riverfront are already being exploited for higher density and attractive housing and visitor facilities. In many ways, Palmetto’s increasingly aggressive approach to economic development serves as an example to other parts of the county. Its challenge is to ensure that the natural assets of the city—particularly the riverfront—are made available for everyone, even as private development is encouraged to maximize profits and create career-type jobs.

Port Manatee is, in the opinion of the panel, a diamond in the rough positioned to become a crown jewel. It is the nearest deepwater American port to the expanding Panama Canal, which will allow larger ships from Asia and other points west to reach the eastern United States more easily. According to 2006 data from Wilbur Smith Associates, the port already has direct and indirect economic impacts of \$1.4 billion annually in the county economy alone and supports 14,200 direct and indirect jobs in the county. (Impacts statewide are \$2.4 billion in economic activity and 20,000 jobs.) These impacts can only increase.

Port Manatee is one of Florida’s 14 deepwater seaports, but it is the only one with significant amounts of land for development that can support port operations, workers, passengers, and goods. An estimated 4,000 acres of land to the east of the port, which extends to and surrounds Interstate 75, coupled with direct, Class A rail service (CSX), gives the port a huge opportunity for attracting high-value economic development serving a vast area of the southeast United States. Moreover, proximity to Interstate 275 readily links the port to the rest of Manatee County and to Pinellas and Hillsborough counties to the north.



Port Manatee is strategically positioned as the closest U.S. deepwater port to the Panama Canal.

Port Manatee is already a designated Foreign Trade Zone (FTZ 169), which is a substantial incentive for both foreign and domestic companies that convert imported goods to higher-value products for reexport while avoiding tariffs. The proximity of the port to Panama and South America, along with its tremendous land development capacity, has already piqued the interest of the federal government, which wants to support further port growth in the United States.

This does not mean, however, that the port is without challenges. To help ensure long-term economic sustainability, it is important for port officials to gain sufficient control of the land to the east so that inappropriate or incompatible land uses can be prevented. Residential development, for instance, would discourage industrial and office development that would support port, rail, and highway access. That said, some retail and hospitality uses should be encouraged. As the port continues to evolve in support of more passenger ships, land-side shopping, dining, and hospitality uses will be needed. These uses can also be supportive of ship crews and to other travelers to Manatee County.



While Port Manatee sees a fair amount of traffic for a facility of its size, the challenge of attracting additional ships remains.

Of course, the biggest challenge—at least at present—is to attract more ships to the port. The panel, however, is quite impressed with the apparent quality and aggressive marketing of the port under current management. Many overseas relationships are being created and expanded to ensure that international private industry considers Port Manatee an excellent place to conduct business. The panel is also impressed with the recent refinancing of debt obligations of the port, which strengthens its ability to make necessary infrastructure investments to attract more growth.

The port, however, remains a central responsibility of Manatee County's government. Elected county commissioners also serve as the County Port Authority with ownership and management responsibilities for Port Manatee. While the panel applauds and supports local oversight of the port, it also insists that running a major international port should not be a task for elected political leaders. Their job should be to set policy for a wide range of county governance issues and, therefore, should relinquish a great deal of ownership and management responsibilities to the private sector (i.e., a private sector board of directors and stockholders). The port is, after all, a business enterprise. Though their intent is not to cast aspersions on Manatee County, the panelists feel that governments ought not to be in the business of business.

Nonetheless, Manatee County should not remove itself from the port entirely. Indeed, it is recommended that only the business operations of the port become dominated by private sector motivations, not the port or its land. The latter can and should remain assets of the county government. They help diversify the tax base and other sources of income for county government, and the county can maintain ultimate control over the disposition and use of the land and water.

The panel strongly urges county officials to pursue other ownership options with private sector investors through a range of possible public/private partnerships. This will help release taxpayers from many of the liabilities of port operations and will help increase economic incentives for

private sector growth, all while preserving appropriate government control of the physical assets.

Port Manatee offers a major opportunity for the county to reinforce its reputation as an international destination. It is a crucial link between the Pacific Rim and the U.S. Eastern Seaboard. But the port is also a crucial link to South and Central America as well as to many nations of Europe and Africa that do not need to use the Panama Canal. It should be fully exploited over the coming decades to increase Manatee County's economic base while contributing to the nation's global economic capacity.

Parrish Area

The northeast submarket, or the Parrish area, is appropriately described by residents as bucolic. In many ways, it represents the early days of settlement in Manatee County. Rural, green, low-density surroundings attracted farmers and, eventually, the railroad. The railroad remains both an important symbol of and attraction for the village center of Parrish. There is much local support for maintaining the Parrish area as a countrified alternative to the hustle and bustle of, say, southwest Manatee County.

This is not an easy task, however. In addition to much development already in place, Parrish has residential lot entitlements numbering more than 16,700. If all these lots are used for homes, at least 40,000 more residents would populate Parrish. Very clearly, residential developers recognize Parrish as a desirable and marketable place. As these entitlements are fulfilled, there is and will be pressure on local utility and road networks to serve the expanding population. Indeed, the planned Fort Hamer Bridge over the Manatee River to connect the north and south parts of the county with a road that parallels I-75 will help growth in Parrish. Because of this, the number of vehicles using roads in Parrish from south of the river may increase opportunities for commercial and retail development, which is in short supply.

Fortunately, special overlay zoning regulations attempt to protect the rural character of the area—at least in the public realm outside residential subdivisions. As one interviewee told the panel, “The overlay regulations are



Parrish, located in the eastern part of Manatee County, has seen a large amount of new development over the past 20 years. However, it also has a unique "Old Florida" character that residents would like to see preserved.



not meant to control what happens inside a subdivision, but they are meant to preserve the open space, trees, and natural look and feel of the roadway corridors outside the subdivisions." That, of course, continues to give Parrish a very appealing aesthetic, which, in turn, creates market demand for more high-quality residences. Good schools further contribute to this demand, especially from families with children.

The outside world encroaches in other ways, too. Economic development is one way. Manatee County's growing reputation as a superb training and competition locale for rowing sports is partly attributable to the quality of the river at Fort Hamer Park, where a major rowing facility is located with intentions to grow. This is putting pressure on the private market to provide more support facilities such as hotels and restaurants. But such uses also need more diverse market sources, like more vehicular traffic, higher-density residential communities, and economic development. Otherwise, support services may be forced to locate relatively long distances from, for instance, Fort Hamer Park, which could contribute to its inconvenience as a major training center.

At present, the road network in Parrish is considered by the panel to be completely adequate for the low density of most development and the relatively low intensity of traffic.

Continued growth—and probably heavier traffic using the new bridge—may quickly decrease that adequacy, however. Costs for additional road and utility capacity, and the maintenance of those networks, will become increasingly difficult to meet if residents must pay such costs based on their proportionate occupancy of the land, or in other words, density.

The panel also expresses its regard for the Parrish Civic Association. As a maturing organization, it is increasingly prepared to represent Parrish's economic and resident interests within the complex of county government. Short of incorporating Parrish as a municipality, strong and consensus-driven representation through such groups as the civic association is essential to preserve the quality of life in Parrish in the face of certain population expansion.

Low density and enforced rural-scale roadway corridors create seemingly undisturbed settings, but that also means that most kinds of retail businesses will not be attracted. This is not because buying power is insufficient in Parrish; it is because there isn't sufficient concentration of that buying power, especially near large roadway intersections. This means that Parrish residents generally have to drive considerable distances for most shopping, dining, and entertainment choices. While this is a lifestyle choice, there is evidence of growing market pressure for more convenient choices in the area. Retailers and restaurateurs, however, simply will not be interested without other market-based considerations like higher densities and high-traffic locations such as an I-75 interchange or a more densely developed urban center.

A particular challenge for Parrish is the aesthetics and landfall geometrics of the coming Fort Hamer Bridge. While the bridge is necessary as a reliever corridor for I-75 and to support continued growth in Parrish, sensitivity about the bridge's design over, and on the banks of, the picturesque Manatee River is an important consideration for preserving Parrish's character.

In many ways, Parrish is a welcome reprieve from the more intense economic development activities in southwest Manatee County and, increasingly, the Lakewood

The planners and developers of Lakewood Ranch have taken care to create natural preserve areas throughout the community.

Ranch area. But Parrish remains an integral part of the county and will have to bear its fair share of infrastructure improvements to accommodate certain residential, economic, and tax base growth in the county. A willingness to absorb many of the costs of such improvements can decrease pressures for more intense development patterns (which can more readily support infrastructure costs per capita). The Parrish Civic Association should also work to increase its reputation as a consensus-builder so that it remains a strong and persuasive force in county governance matters.

Lakewood Ranch

Lakewood Ranch has successfully created a sense of place—something that has not been achieved elsewhere in the county thus far—through a true live/work/play environment. Its regional retail and office centers complement the county's first mixed-use Main Street development with residential uses located over retail space. Lakewood Ranch has received a high level of positive community and regional recognition, and is an asset to Manatee County as a whole.

In addition, Lakewood Ranch contains the Premier Sports Campus, which is able to host a variety of sporting events. Lakewood Ranch is also adjacent to Nathan Benderson Park, which will host rowing and other water sport events, and will directly benefit from its success. Both of these venues draw participants and spectators from around the world. Lakewood Ranch is also accessible to large areas of open space—which provides opportunity for more



recreation, including biking, equestrian activities, and even ecotourism.

Even with these great strengths, this area faces challenges in its efforts to retain its strong market while also contributing to the success of the county as a whole. The area's success has shifted market focus and investment away from existing areas. In addition, a strong concentration of buying power exists here that is not being captured elsewhere in the county. However, this is primarily because there is no other community as successful as Lakewood Ranch elsewhere in the county.

The continued expansion in the use of the new facilities, along with supporting lodging, dining, recreation, and retail uses, will provide Lakewood Ranch with an opportunity to continue its strong market trajectory. There are also opportunities for the residents of Lakewood Ranch to have stronger connections to the rest of the county, as other areas become places that have a “there” there.

Southwest Quadrant

The southwest quadrant has several assets with which to leverage growth potential—an enormous amount, particularly for an area that has seen less development than other parts of the county in recent years.

Airport. Sarasota-Bradenton International Airport (SRQ) is a key driver of and economic engine for the county's future property and economic growth. Aviation may have the potential to become a strong driver of well-paying skilled jobs that can effectively grow the county's economic base. To capture that opportunity requires the county to aggressively pursue a clear vision that is supported politically with consistent funding and deep community-wide commitment.

The county should empower the airport to expand its business model as the regional low-cost alternative to access



Lakewood Ranch has a variety of housing types, including single-family (pictured here) and apartments.

Arts amenities near the water, whether in Manatee County or Sarasota County, should be thought of as elements that could drive the revitalization of the southwest quadrant.

Florida's west coast. The airport should be empowered and financed to more fully use its current passenger and cargo capacity. The airport should seek to develop a strong private/executive aviation business in partnership with the private sector on airport property. It also should actively recruit light and heavy maintenance and parts suppliers with low-cost facilities that attract skilled talent from the state's aviation schools. The airport should evaluate the feasibility of working with the Manatee County School District to establish an aviation program that feeds skilled workers into industry jobs at SRQ. The George T. Baker Aviation School run by the Miami-Dade County Public Schools could be a model. The State College of Florida should also be engaged to partner with the public schools to provide post-high school skills and knowledge training.

Aviation careers offer stable, long-term, well-paying employment that requires a college degree. At the time of the panel's visit, reports reviewed indicated that the average airline employee earned in the range of \$50,000, with similarly high wages for specialty machinists and mechanics.

The airport should be tasked with undertaking a feasibility study to understand whether it could develop or capture a larger share of the regional air cargo business. If so, the airport should be tasked with leading the planning and development of adjacent industrial-zoned property to accommodate both that use and other aviation-related industrial uses, such as aircraft and engine maintenance and modification as well as airline ground schools with simulators.

Higher Education/Cultural Center. The University of South Florida (USF), New College, the Ringling Museum, and Florida State University's Asolo Theatre create a concentration of educational and cultural attractions that are a unified district on paper, but not yet on the ground. Some of these institutions are in Sarasota County, but the concentration is there to be built upon by Manatee County. Of greatest importance, it is a district on the water—a connection that is not yet emphasized enough in the county.

Downtown Bradenton. Just by virtue of its existing urban fabric, downtown Bradenton is an asset, but additional



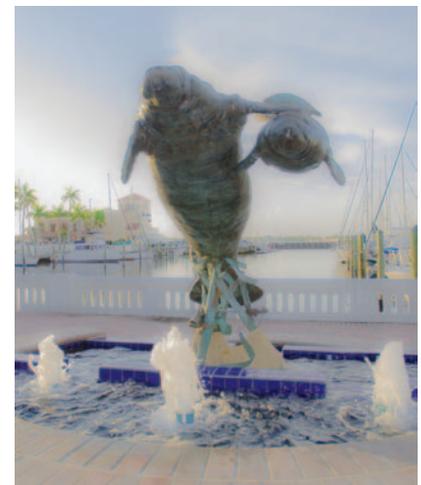
factors make it a special place. Downtown appears to have made an enormous leap forward with the new Performing Arts Center, a linear public space along the Manatee River. It has opened up the water as an amenity, established a new local and regional destination, and created one more recreational opportunity in the county. McKechnie Field, the site of spring training for the Pittsburgh Pirates baseball team, brings in 6,000 people per Pirates game. With 17 games over a two-month period, a total of 102,000 people come to and sometimes stay in downtown. In addition, relatively new waterfront condominiums are a great step toward creating a live/work/play environment.

DeSoto Square Mall. This locally accessible, regional-level shopping attraction has seen better days, but its recent purchase shows investment interest in this area. The panel understands that one of the new owner's plans is to open up the center and connect it with the surrounding community, which would be an asset to the area.

IMG Sports Academy. IMG already has a global reputation and draw, and is planning to nearly triple in size from 700 students to more than 2,000. The facility recently expanded by 110 acres. Users of this facility require many spin-off amenities, both hospitality and sports related. As the number of users increases, so will the demand for these amenities.

Bradenton's Riverwalk has been a great success in attracting visitors to downtown and serving as a catalyst for residential development along the river.

Downtown Bradenton is home to county government offices along with many restaurants and bars.



ROBERT NEFF

Manatee Fruit Company. The approximately 1,300-acre site located on Sarasota Bay is owned by the Manatee Fruit Company, and has a number of conceptual plans associated with it. Development of this site as mixed-use development with new types of retail and housing products would be a game-changer for the county.

Challenges in this area of the county are more than offset by the great potential of the assets it has to leverage. Despite congestion created by the current street configuration and lack of transportation alternatives, this area could thrive with key infrastructure investments. The southwest quadrant also faces challenges related to its older housing stock without substantial rehabilitation potential, and neighborhoods with some of the highest density in the county but without amenities like sidewalks and transit. These challenges stem from a lack of investment in the area rather than inherent deficiencies.

Planning and Design

AS DISCUSSED in the previous section, the population of Manatee County is expected to grow to 416,300 by 2030—an increase of 88,400, or 21 percent. Growth is happening and will continue to happen. Thus, planning to accommodate growth is essential for the county to focus its investments.

The panel recommends that the county approach decision making for infrastructure and other public/private investments on the basis of immediate and long-term impact that can be linked to leveraging additional public and private investment. The panel suggests that this focus be primarily in existing and emerging communities in order to create “critical mass” in the marketplace that stimulates substantial private investment and that leverages existing investments.

The panel’s findings indicate that the county needs to accommodate an increased demand for 2,300 additional housing units annually for the next 15 years. Providing a diverse range of locations for a variety of housing types with a broad spectrum of price points is essential to support and sustain projected growth. Moreover, the panel recommends that the county focus its infrastructure investments in a manner that both supports and stimulates the private housing market as well as enhances the quality of life for existing and new residents in ways that create outstanding places, improve and expand options and modes of transportation, provide more parks and open spaces, and enhance opportunities for logical, sustainable economic development.

The county’s *How Will We Grow?* planning document lays out three alternatives for growth strategies to address the planned increase in population. The panel assessed each strategy and determined that all had the potential to sustain projected growth and that all were generally viable

relative to appropriate submarkets. The panel recommends that the county place the most emphasis on Alternative 2, which has the potential to obtain the greatest return on public investment, both immediately and over time.

Key Issues and Opportunities

While all areas of Manatee County require investment and focus, the panel recommends that the county concentrate its efforts on those areas or submarkets requiring immediate investment in order to stabilize values and stimulate private property investments. Existing, unincorporated urbanized areas are considered the highest priorities for immediate and intensive focus and investment. Those areas fall in the following priority order: the Southwest/Bradenton submarket; the river area; and the Palmetto/Parrish areas. All have significant potential for redevelopment, but land uses, transportation, and open space are the key issues affecting the areas.

Moreover, the panel found three general areas that required focus, planning, and an improvement plan. These general areas are most applicable to the existing urbanized areas west of I-75—in particular, the southwest quadrant and the river quadrant on both sides of the Manatee River. The panel found that those areas, as well as other parts of the county, lacked a defined sense of place. That is to say, “there is no ‘there’ there,” which means these places are indistinguishable from other parts of the county or other places on Florida’s west coast that lack a sense of place.

On the basis of this overarching observation, the panel recommends that the county strive to create individually defined places that reflect the nature, traditions, and times of those places and their people. To create those places requires the county to look at those areas’ primary problems, which consist of the following: land use development

patterns and investment/disinvestment; transportation and connectivity or the lack thereof; and open spaces that organize and shape the character of those places.

Following are the issues that the panel recommends be explored in greater detail.

Transportation

Throughout the county, there is a need to better interconnect the north–south and east–west traffic and non-vehicular traffic network to reduce and ease congestion and make connections to the central and island portions of Manatee County easier and smoother to access. At present, only four roads provide access to and from the eastern portion of the county and the rapidly growing Lakewood Ranch area to Bradenton’s core, the airport, or the beaches. North–south connectors are similarly constrained, with access now concentrated either on I-75 far east of existing urbanized areas or on US 41/19, which funnels traffic into central Bradenton in order to cross the congested connections across the Manatee River. The current traffic pattern serves to congest cross-county traffic. But, the panel found there is ample existing road network, so the vehicular network requires redistribution, not expansion.

Following their theme of getting more than one outcome from a single investment, the panelists recommend that the county use funding to focus on better connections for traffic while at the same time draft policies that create equal status for cyclists and pedestrians. Along with the panel’s recommendation that the county seek to follow

healthy-community guidelines of more sidewalks and bike lanes, other innovative solutions should be considered that will help build the county’s brand as a sports place with bike lanes and sidewalks that create truly viable transit alternatives.

Discussion of how targeted transportation investment can create a sense of place and identity as well as smooth out and connect traffic follows in the later discussion of Central Park.

Land Use

Auto-oriented land uses determined the development patterns in the Southwest/Bradenton submarket. These decisions were made over 50 years ago and have shaped development patterns ever since. To change development patterns now—and for the next 50 years—the county’s focus on creating logical land use through development and zoning codes must be a high priority.

The panel found that although the majority of the county’s existing urbanized areas were “fully” developed in decades past, the patterns established are very low density, on smaller parcels, and not connected to adjacent neighborhoods or commercial areas. Current development patterns have created silo neighborhoods where services are not within walking distance and street walls are set too far from the right-of-way. This pattern of low-density development has made the use of vehicles necessary and created undesired traffic congestion. Couple the lack of connection with high vacancy rates, and the result has been blighted conditions, particularly in the southwestern quadrant and other older urban areas.

With the current development pattern being single-use and auto-oriented, it is noteworthy that the development preference stated by many of those interviewed by the panel is for walkable, connected neighborhoods, similar to those being developed in the core of Lakewood Ranch. The panel recommends that the county investigate the use of form-based codes, including zoning that fosters the development of sustainable, walkable neighborhoods easily connected by pedestrian and bike paths to retail, services, and recreational opportunities. Walkable, connected



COMPLETESTREETS COALITION

Even streets designed to carry large volumes of vehicular traffic can be adjusted to safely accommodate bicyclists and pedestrians.

neighborhoods are healthy neighborhoods and achieve superior returns on investment with lower costs of health care and higher values for property.

Achieving land use patterns that meet these goals requires a comprehensive and integrated approach to the comprehensive plan process, with the zoning code matched to the capital improvement plans for transportation, recreation, and other infrastructure.

To organize and create a funding mechanism that will effectively and quickly implement the desired changes in land uses, the panel recommends that the county consider revising the existing CRAs in the southwestern quadrant. A sample vision for those organizations would be to merge the two entities into one, expanding the boundaries to include all unincorporated areas from the bay to near I-75 on the west and from the Bradenton city limit south to the Sarasota County line. Such a revision to the existing CRAs (or alternatively, the extension of a tax increment finance district only) would produce a solid revenue stream and be capable of effectively dealing with land use issues and infrastructure investment in a coordinated and comprehensive manner.

The existing development patterns throughout the county indicate substantial areas where infill development could and should logically occur. A focus on infill and revitalization maximizes the return on existing investment and reduces the need for new basic infrastructure. Since existing urban areas have services, the focus should be on repositioning smaller parcels to facilitate higher-density development. While there are myriad problems associated with development patterns that mix single-family houses with mobile homes and commercial strip shopping plazas on arterials, only a comprehensive approach that embraces these problems will solve them. Again, getting more bang per investment buck should be the vision.

Open Space

Manatee County is blessed with abundant open and natural space. About one-third of the county is water—river, bays, estuaries, and the Gulf of Mexico. Most urbanized parts of the county are surrounded by water, and were ur-

banized because of this relationship to water. The eastern portion of the county is essentially rural and open, with farms and ranches as well as parks and preserved lands. As currently developed, most urbanized parts of the county have little connection to the water or open spaces. The panel feels that with such exceptional natural features, the county has an opportunity to create a vision that can help brand Manatee and leverage the creation of a large open space system.

Citing the mantra of getting more return on investment, the panel encourages Manatee County to create and implement a cutting-edge open space plan that seeks to link and provide multiple opportunities to connect citizens with water, estuaries, and open space. The panelists encourage the county to look to areas such as flood control and water management as immediate means to assemble a connected system of paths, greenways, and recreational trails linking all parts of the county. Moreover, the panel feels that such a connected countywide system would also enhance the county's ability to attract more sports training businesses and athletes as well as provide a catalyst to create a healthy community. It is opportunities such as these that the county is encouraged to pursue as immediate and long-term economic generators as well as solutions to flooding, and expanding pedestrian and bike paths.

A comprehensive plan for open space and greenways that effectively connect and link with roadways, parks, culture, shopping, and business districts should be a significant component of *How Will We Grow?* Land prices are at a low ebb in the market cycle. The opportunity to acquire critical links should be aggressively pursued. It is through an



LLOYD RICHESTER

Open space can be used to connect nodes throughout Manatee County while promoting active lifestyles.

Downtown Bradenton's Riverwalk has become a magnet for visitors and residents alike. Continuing this amenity on both sides of the river and connecting it to other open space assets would highlight the Manatee River as an identifying feature of the county.

organized system of open spaces that effectively knits the community together that substantial and immediate value are added to the county.

Investment in public open space is currently dedicated to the vehicle, where the majority of funding is available. The panel recommends that these funds be viewed differently. Rather than continuing to view these resources as strictly to expand automobile movements, the county is encouraged to think how those funds can be used to enhance bike transit and create more sidewalks and alternative transit modes that help mitigate the need for more traffic investment.

The panel recommends a focus on functional and aesthetic improvements to roadways that effectively link and connect the open space system with streets, including dedicated bike lanes. A five-year county park master plan should be studied to determine deficiencies in amenities and park locations.

Transportation, land uses, and open space are key issues affecting redevelopment in the Southwest/Bradenton submarket. Improving key issues may begin by leveraging existing community assets, which include soft assets, hard assets, and opportunities for an expanded green network.

Soft Assets and Opportunities

Soft assets are vital to community development and include things such as culture, safety, education, the environment, history, and even local or regional athletics. Soft assets play a major role in how attractive a neighborhood may be to live in. For example, a neighborhood may have proper police coverage, but have a perception of crime. In addition, schools may exist, but they receive poor scores. Though difficult to map, soft assets are essential to the perception of a viable neighborhood, enhancement of property values, and attractiveness to future investors and residents.

The panelists understand the wealth of soft assets that Manatee County has in place. They also understand that the county has not yet effectively marshaled those assets as tools that illustrate what the county has to offer to resi-



BILL ROGERS

dents and business. The panel focused on how the existing assets of Manatee County could be exploited better to build its brand, leverage development and redevelopment, and serve as the basis for marketing and brand enhancement.

As discussed previously, there are ample soft assets within the county from which to create opportunities. History and culture especially play important roles in this opportunity. Historic sites such as the Ringling home and museum; the old towns of Palmetto and Bradenton; and other places are ideal “frames” in which to create unique and interesting places. The riverfronts on the north and south shores of the Manatee River are likewise outstanding opportunities to leverage more than one outcome, as shown by Bradenton's exceptional new downtown Riverwalk. By providing access, connectivity, and activities that promote healthy lifestyles, Bradenton's riverfront has become a magnet for new residential options, attracting people to the area, which had previously been in decline.

The Riverwalk has likewise breathed new life and opportunity into the emerging entertainment businesses on historic Main Street, which were not thriving prior to the Riverwalk's completion. The panelists encourage the county to ponder the following scenario: If the Riverwalk were part of an overall pedestrian system that connected cultural assets such as the library and art museums with food and drink establishments as well as with the recreational activities offered by McKechnie Field, IMG, the university/college center, and the Ringling cultural zone, it would be a model to be expanded countywide. It is not simply having such resources, but rather how they are integrated into

the community that makes them effective tools to enhance both quality of life and economic development.

The panel sought to highlight soft assets to illustrate the points about defining and creating character. Soft assets often serve to define a neighborhood or part of town. Well-known buildings such as the Ringling Museum and Asolo Theatre, for example, inspire design within their neighborhood, influencing New College and USF architecture and planning. Soft assets can be thought of as attractants for similar activities that can foster clustering and ultimately the creation of an entire area known for such activities, which is also a draw for those people engaged in that activity or for those who want reside there.

Hard or Physical Assets and Opportunities

A number of physical assets are important in the redevelopment of the Southwest/Bradenton submarket. The following are examples of existing physical features that are important for such redevelopment:

- the airport
- the port
- IMG
- McKechnie Field
- USF, New College, and State College of Florida
- Libraries and schools
- the Bradenton Riverwalk
- the Ringling Cultural Center
- the Bradenton Cultural Center/Old Town

These physical assets represent interests such as sports and recreation, education, and cultural amenities and also are potential job creators. Rather than creating ordinary projects, the county is encouraged to leverage the interest generated by local assets to create places that are unique, vivid, and exciting that can be found nowhere but in Manatee County. The result is a destination-driven redevelopment; places are created where people want to be.

The panel also recommends that the county invest in a gateway study and implementation. The study should determine the best locations for signage and wayfinding that let visitors and residents alike know where they are and why is it special. The implemented gateways would function as important hard assets, becoming unique landmarks in the county.

Green Network Opportunities

The figure below showing existing parks and green space in the county reveals an opportunity along the US 41 corridor for an expanded green network. Connecting northern Bradenton with the southern edge of the county is a bold vision that may catalyze development. Additional parks, alternative transit routes, and an improved public realm are catalytic for redevelopment.

The panel recommends the addition of parks and green space along the redeveloped US 41 corridor. Parks are economic generators as well as important community gathering spots, and as such are key in the redevelopment of southwest Bradenton. Accessible parks increase social and physical activity as well as alleviate flooding that has been problematic for areas along the corridor.

To connect new parks along the US 41 corridor, the panel recommends an alternative transit strategy and focusing on improving infrastructure and public realm amenities in the corridor. A trolley system running north–south would connect the region and reduce the number of single-occupant vehicles on the roadway, relieving stress on roadway

Existing open space in Manatee County.



infrastructure. The public realm adjacent to the trolley would function as a linear park as well, providing safe bicycle and pedestrian routes where none had previously existed. In addition to alternative transit routes, existing public rights-of-way should be enhanced. The panel recommends the investment in the public realm, with improvements including but not limited to wide sidewalks, buried or hidden utility lines, reduction of curb cuts, crosswalks, and separated bicycle routes. The panel also recommends the implementation of the complete-streets initiative as a way to improve public realm transportation corridors.

Integrate Sectors for Economic Opportunity

Through multiple cross-sector investments and specific planned actions, the county can begin to integrate its different sectors—both geographic and economic. Regional connections and gateways and the creation of “places” rather than projects will support the continued and renewed development of sports, recreation, technology, and industry, including Port Manatee, as the country’s key economic sectors.

Create Multimodal Connectivity

Infrastructure and environmental assets will also play an important role in supporting the development of local destinations and economic activity. Transportation investments should be targeted and coordinated.

At the heart of growth lies the solution, which is transportation. Connectivity around the county is important, and will become even more so. The county’s overall vitality requires a reexamination of transportation’s role, function, and purpose. In carrying out this work, the leadership of Manatee County has the capacity and the opportunity to rethink its priorities so that transportation becomes a means of driving quality of life, and growth in high-quality jobs.

Market research has shown that people increasingly want to live in walkable neighborhoods with a variety of transportation options. The county must rethink its business-as-usual approach to transportation planning and investment to integrate systems and amenities critical to its residents. Connected parks and trails that support

bikes and pedestrians and expand access to recreation opportunities can also serve as flood relief areas and create a countywide green network. This is a core component in the creation of healthy communities that also hold and create economic value.

In addition to the concept of a green network, the roadway system should be considered in a new light to integrate bike, pedestrian, and transit infrastructure. Certain corridors, such as the Tamiami Trail, could be designated as “complete streets” and include clearly delineated bike paths, wider sidewalks to enhance pedestrian safety, and dedicated bus lanes in high-traffic-volume areas. Increased transit service via bus or even trolley could also lessen the need to engage in costly road expansion projects.

Create a Countywide Vision for Investment

A compelling vision can provide focus for the public and private sectors. Manatee County contains many unique places that can be preserved and enhanced. Creating a countywide vision could bring together the distinctive assets and character of the county, and illustrate a competitive business proposition for attracting more private investment, while providing a prioritized framework for focusing public improvements.

Manatee County can be thought of as having a number of unique districts. The panel has begun to sketch out what those might be in the map to the right. Rather than a one-size-fits-all approach to infrastructure investments and a nonstrategic approach to development approvals, the regulatory and decision-making structure should treat each of these districts as having a distinct character. Each should each be given a name and a “story” that identifies how it stands apart—in other words, a brand and character.

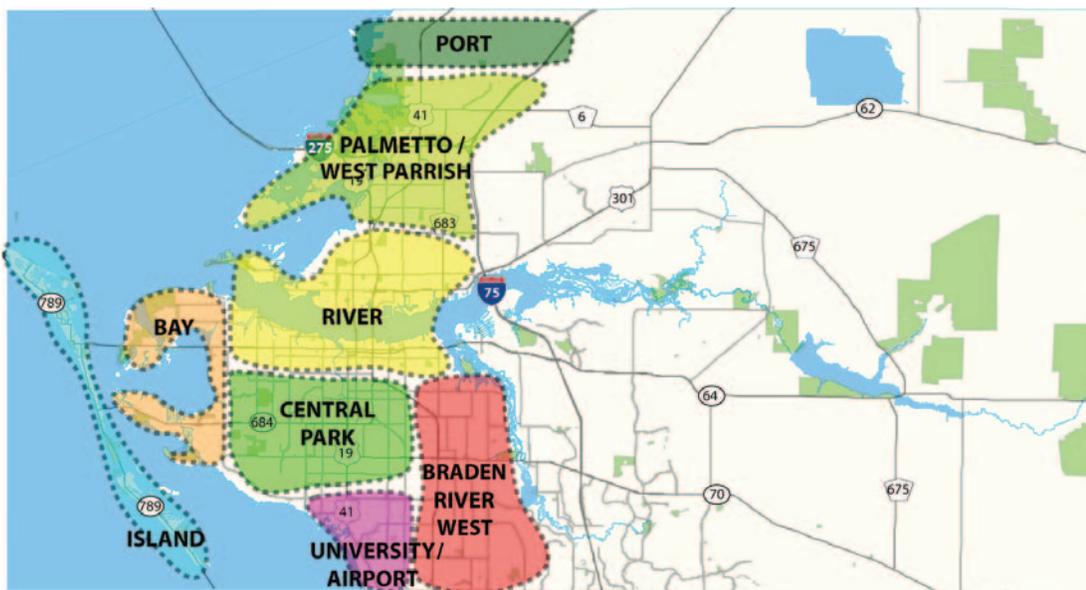
By pulling out each of the districts, the county and local planning agencies can identify the key value areas in each district that can be enhanced and leveraged to attract new investment, while identifying critical improvements that are needed to attract more development. In addition, each dis-

trict should be distinctive enough to be marketed uniquely. The panel identified a series of districts that could be used for further definition:

- **Island.** This area is already being strongly marketed with Longboat Key and other memorable beach destinations.
- **Palma Sola Bay.** This is a semicircular bay that presents a natural setting and opens to the gulf waters. The bay offers spectacular views and could be home to a number of spectacles that can be created on the water or on the perimeter of the bay, including an extended boardwalk, water sports, and landmark elements.
- **River.** The river area is already becoming a place with a mix of uses and a memorable Riverwalk on the south side. Additional large-scale opportunities could include an island-type structure being created in the middle of the river, between the Palmetto side and the Bradenton side. This island could be connected to the existing bridge or be part of a future north–south bridge connection, and provide a distinctive destination with views of the city, water, and gulf.
- **Central Park.** Encircled by the Palma Sola Bay, the Manatee River, and the university district lies the historic heart of Manatee County. This district contains the afore-

mentioned Tamiami Trail and distinct architecture and community character. A bold vision for this district could include the enhancement of the trail, and the introduction of new park spaces that provide community open space as well as new development opportunities.

- **Tamiami Trail.** The historic trail is a strong north–south spine along the west coast of the county. There are many underused land uses along the corridor; however, the corridor has rich character in some locations, including mid-century–designed buildings and parks that could aid in the preparation of an enhanced vision. Re-envisioning the corridor should be bold and allow for many levels of investment and redevelopment. For instance, within the historic trail corridor, a linear park could be created and could stretch from the university to north of the river. This linear park could be home to many new destinations and places in the west county, and include many different types of park spaces and public buildings, such as libraries and museums, and private destinations, such as theaters, retail, and other event locations.
- **Braden River West.** This district is unique by virtue of the fingers of wetlands and tributaries that edge the Braden River as it turns south, west of I-75. This district



Manatee County districts.



The red stars indicate suggested locations for gateway and landmark features.

contains rich water amenities and is adjacent to the rich, open lands and agriculture of central Florida.

- **Port Manatee.** The port area has a bold vision and could support a range of businesses and jobs, including skilled labor, manufacturing, and logistics. As discussed previously, this location has many competitive advantages compared to surrounding port locations. The port district could be developed as one of the largest employment areas in the north part of the county and a regional attractor for new investment.
- **Palmetto/West Parrish.** This area is strategically located along the gulf, with the port district (future employment center) to the north and the river district (entertainment) to the south. While the low densities within some areas of this district should be increased at nodal areas, it provides a rural setting and living conditions that are very attractive. Increased densities at logical nodes could support housing and community support services for new job growth surrounding the port.
- **University/Airport.** This district could support large businesses and job growth as discussed previously in this report. New businesses could grow north and east to form a large technology, research, and aviation nexus and provide a range of higher-than-average-paying jobs.

This district could be viewed as the southwest business center for Manatee County, while the port district could be viewed as the northwest business center.

Each district's character should be linked with lifestyle and market sectors. A market research consultant should be engaged to identify and define the markets in each area,

including lifestyle sectors and emerging demographic characteristics. On the basis of these delineations, individual district plans and design guidelines can be created by the county, and the Capital Improvement Plan (CIP) should be in alignment with them. The research should be publicized to provide credibility for the planning process and to help county staff work with developers. The plan should outline, in detail, the overall vision for the district, what types of development are desired where and in what time frame, as well as built-in incentives available for complying with the plan.

Gateways and landmarks also are an important piece of the character district concept. These elements are vital to creating image and brand. For example, the installation announcing one's arrival into St. Petersburg at the end of the Sunshine Skyway Bridge announces one's arrival into the community and in some ways serves as both a gateway and a landmark. In the figures above, the panel has made recommendations regarding the general location of future gateways and landmarks.

These elements can be as simple as unique branded signage, or as complex as a large public art installation, but they should always be dramatic visual statements.

Leverage Current Development Momentum

Manatee County is fortunate to have multiple areas of current development and investment. The panel recommends that these areas be the focus for new improvements and joint development partnerships in initiatives where the public will benefit.

Riverfront

With new development along the riverfront, it will be important to create new opportunities for investment that can enhance the riverfront as an entertainment place. Suggested uses should build on existing strengths based on market demand and include hospitality, residential, recreation, entertainment, and retail.

Manatee Fruit Company

This is a large landholding with premium gulf views and access. The area is envisioned for higher-end development and provides good roadway connectivity to Highway 41 and Highway 684 to Anna Maria Island. To take advantage of water views and the urban location, it will be important that this area not be developed in the low-density suburban model. Rather, the panel recommends that densities be increased along the water and around well-designed places within the development that are interconnected. In addition, the waterfront should be designed as a series of public places that could serve as destinations within the county, as well as amenities for the residents and surrounding neighborhoods.

Lakewood Ranch

The continued development at Lakewood Ranch has created a regional place in Manatee County for southwest Florida. Its location along I-75, and adjacent to the Braden River, provides convenient access for new business locations that are supported by new, desired neighborhoods with regional and local community services. This area has already been identified for competitive sports and training facilities. The panel recommends that the continued buildout of this area incorporate more distinctive regional destinations and places, supported by a fine-grain interconnected street network with walkable block sizes not to exceed 600 feet deep. Suggested uses include satellite educational campuses, medical facilities, technology uses, and office space, all supported by a diversity of for-sale and rental housing, including small-lot single-family houses, townhomes, multifamily residences, and apartments.

Port Manatee

The current vision for the port area creates a strong east–west development corridor connecting the port to I-75 with new businesses, distribution facilities, and manufacturing. These opportunities should be expanded to include additional businesses in the logistics and technology sectors. Additional infrastructure may be needed to create intermodal connections for marine, rail, and highway distribution. As this area is also envisioned to be a center for job growth, it will be important for the area to provide a range of housing and essential community support services, such as schools, local shopping, and recreation, for residents of all income levels.

Framework for a Big Idea

The redevelopment of the southwest quadrant can be an organizing principle for central Manatee County. The panel proposes the development of a “Central Park” along the Tamiami Trail that will create a strong central place in the county and will begin to stitch the four quadrants together. Such a park will connect neighborhoods to community assets—downtown Bradenton, the airport, and the cultural core, among others—in addition to serving as the framework for the central core of the county.

Transportation along the Central Park Spine

Principles of complete streets and multimodal transportation planning should be the focus in this area to create a truly great place. The pedestrian experience must be comfortable and safe and allow for easy access to transit service and activities that line the park.

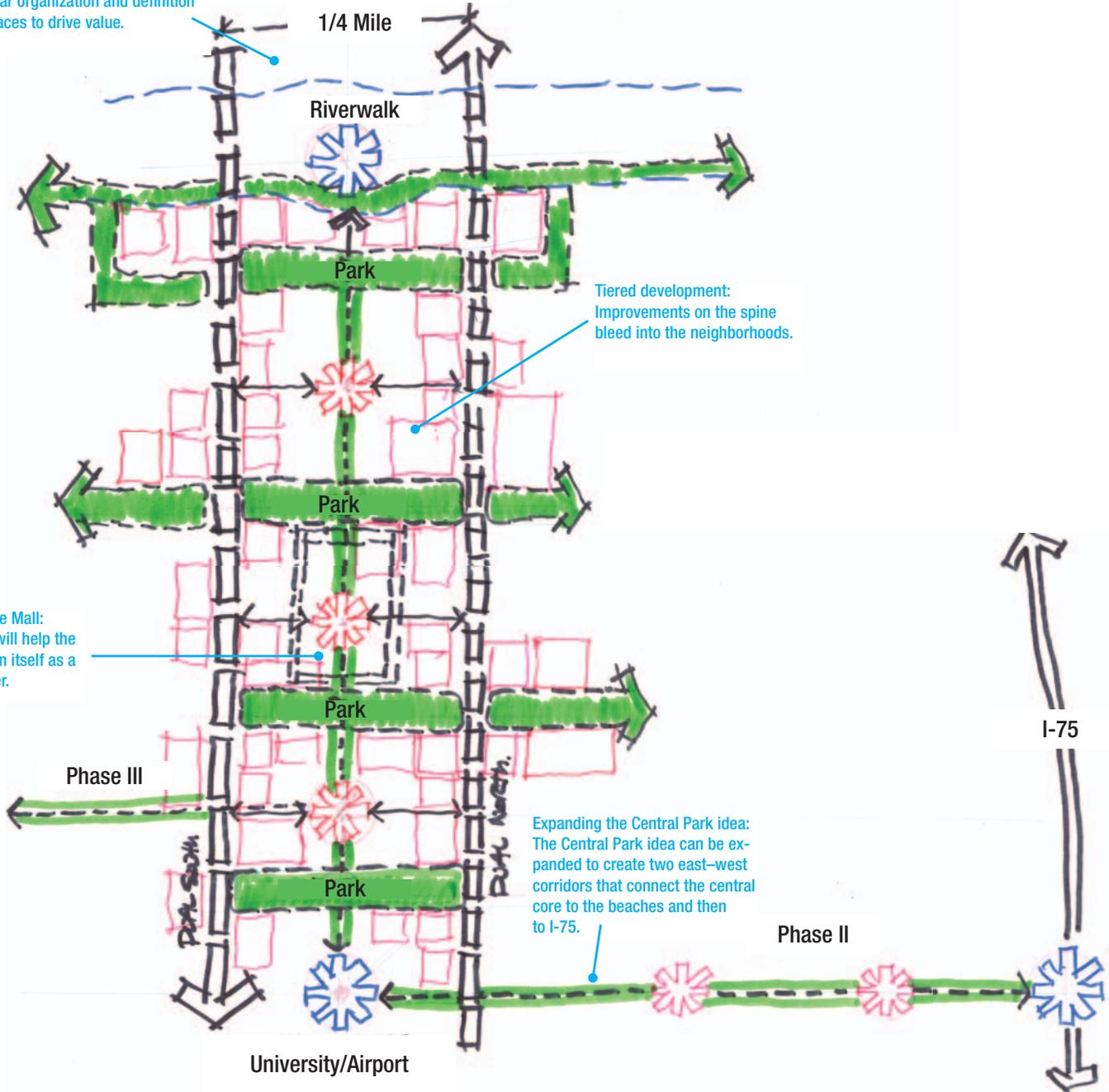
Traffic management should work to smoothen and simplify east–west connections with logical pathways of access. These pathways should be planned to eventually work seamlessly with trolley or light-rail service along the corridor. A framework for this future investment can be created through the use of dedicated bus lanes that can be converted into light-rail transit or trolley rights-of-way in the future.

Phase I

Tamiami Trail Corridor

This illustration shows how the Tamiami Trail corridor—a strong north-south spine along the west coast of Manatee County—can be re-envisioned to allow for many levels of investment and redevelopment, resulting in new destinations and uses.

Historic community on north side of river: The north side of the river can also benefit from a similar organization and definition of urban spaces to drive value.



Getting There: Implementation

THE PANEL COMMENDS Manatee County's leadership for assessing and taking preliminary steps to validate its comprehensive plan with *How Will We Grow?* Understanding how current policies have shaped the county provides a starting point to reset the community's thinking as to where it should focus its resources if achievement of expressed goals that focus on return on investment, economic growth, and creation of a strong jobs base is to occur. Achieving goals requires digging deeper and setting a course with a bold vision that inextricably binds existing assets to their maximal potential.

For the county, the heart of the opportunity lies in revising its policies so that they execute a unified vision that moves forward with the implementation of individual projects over time.

Current Policies

The panel found a “disconnect” between the county's expressed goals of achieving higher and better “return on investment” and its current policy codified in the comprehensive plan. Simply put, the county's current policy appears to be a one-size-fits-all approach for investment and regulation. Such an approach does not address and has not addressed the unique needs of the county's differing urban and suburban neighborhoods and communities.

The panel encourages the county to move away from the perpetuation of its current policies and plans that encourage and financially support costly sprawl to the detriment of existing urban communities. The panel found that supporting “anticipated growth” over continual reinvestment and improvement in existing areas has encouraged sprawl and led to unsustainable cost structures that support continued low-density expansion. While that is not the intent, it is the consequence.

The existing policies grant infrastructure credits to “new” development—an incentive that provides a cost advantage over reinvestment in areas with existing infrastructure. The panel recommends that this policy be reversed to refocus the community's investment on existing developed areas and remove incentives from greenfield development areas.

The metrics of such a policy change would enable the county to very quickly achieve its goal of obtaining the highest returns on its investments while accomplishing the revitalization of the county's urban core neighborhoods and communities. Moreover, the panel feels that implementing such a policy change will give the county the ability to focus on building true characters and identities for currently developed areas that give them great value as places, as well as the abilities and strengths to attract new private investment that accelerates the county's return on investment.

Economic Drivers

There are specific types and clusters of development that encourage job growth in targeted industries. The panel recommends that Manatee County begin by undertaking a detailed market analysis in order to understand what jobs the county can reasonably expect to attract. From that research and analysis, it can then invest in land use, infrastructure, and education, resulting in attracting and nurturing those industries. Each of the four quadrants should be analyzed as a discrete area, with the county as a whole also being analyzed. The goal is to attract and create high-quality jobs. That requires real estate development to become a functional tool for economic development.

Port Manatee

The port is currently a key driver for the region's economy, and the potential exists for substantial growth if certain

steps are taken. First, a port overlay district should be established similar to the airport overlay district. While the development of a more direct connection to the highway is laudable, what is needed first is an infusion of capital into port operations.

While they were impressed with the energy and direction of the current leadership, the panelists feel that the port's current capacity and administrative structure will not exploit its full potential. Leadership should build on the existing foundation with a public/private partnership (PPP). If this is pursued, the PPP options that should be considered include: 1) a long-term lease based on oversight terms and conditions, allowing for a maximum upfront payment to the county; 2) formation of a joint venture with provisions for an infusion of private sector equity; and 3) a lease-management agreement. As a final note on PPPs, as part of the need for improved regional dialogue, greater coordination with the adjacent towns of Bradenton and Palmetto can only support the port.

Implementation Strategy for Economic Development

As the economy begins to improve, the county needs to incorporate a review of the comprehensive plan into its current development assessment, and bring forward specific recommendations to the county commission. There needs to be further development of "torchbearers" with political will and policy capacity for this to move forward to completion. While the plans may take years or even decades to come to fruition, starting today to examine the specific and necessary changes to the comprehensive plan better positions the county in relation to positive changes in the economy and inevitable population growth. The question ahead is where does the growth want to go and what can leadership do to guide it?

Changes to the comprehensive plan should focus on neighborhood redevelopment and increasing urban density west of Interstate 75 and fully budgeting and modulating the new development east of Interstate 75. Transportation sections should be realigned so that the investments

can and will be made in the amenities that will create the sense of community, identity, and location the county is striving for. These amenities include but are not limited to gateways, bike paths, pedestrian walkways, and greenways and their relationships to the economic drivers.

As part of these efforts, the panel recommends implementation of a form-based code for the county, moving incrementally and beginning with its southwest district. A form-based code avoids the micromanagement of traditional zoning and focuses on addressing the relationship of the building form and facade with the street and public realm. The panel believes that a form-based code will encourage innovative solutions and design that respond to the individual needs of each district. For example, if properly implemented, form-based codes can expedite the development process while supporting historic neighborhoods and pedestrian safety.

In order to better achieve that goal, sequenced development—including allowing higher densities in certain old-growth areas as shown in *How Will We Grow?*—will generate higher tax revenues while protecting the overall quality of life. And in order to avoid decay and the burgeoning pattern of lack of investment, action can and needs to be taken now in the areas where the infrastructure exists to strengthen already strong neighborhoods and actively reverse the downward slide in others. This can take place through land use regulations, form-based codes, development projects, and strategic public improvements. The county should deepen the analysis begun in *How Will We Grow?* and place the strongest focus on the areas of greatest new opportunity. These areas should incorporate the activity centers with the greatest disinvestment. While these activities are being carried out, care must be taken to ensure that progress is made in such a way that expresses the unique character of each neighborhood.

At present, the county's approach to transportation challenges is reactionary in practice, supporting only the movement of vehicles from one area of residential growth to another. Instead, it must be seen as a facilitator of economic growth, improving the health and vitality

of residents, and reducing the medical costs that drive the county budget. This type of strategic transportation investment framework can also function as an attractor for young professionals seeking an active quality of life.

Districts and CRA Expansion

The county can strengthen its existing assets, preserve its way of life, and progressively build its economy. The panelists have identified more areas of development opportunity and job creation that can occur throughout the county. In dividing the county up into four sections for the purpose of analysis, the panel also feels that each section has to be actively managed by the county, but with different and distinct tools for each. The county government should begin to think about fulfilling the role of master developer, like a symphony conductor bringing each section of the orchestra into overall harmony, with each maintaining its integrity, role, and voice, providing a high-quality place in which to live, work, and play. In the eastern portion of Manatee County, the panelists feel that development east of I-75 will happen without inducement, and instead requires a reevaluation of the impact fees and a modulated pace. West of I-75, however, redevelopment must take place instead.

The panel thinks that the one-size-fits-all regulatory environment must be cast aside in favor of individual standards for each section of the county. The varied existing development patterns call for individual responses. The comprehensive plan must be refined for each district, just as the impact fees and zoning must be refined and respond to the existing infrastructure and condition of development.

The easy work of developing east of the highway will take care of itself, and if impact fees are properly modified, will help with the challenging work of revitalizing the older core neighborhood. It is left to the government to do the big things and the difficult things, and the panel feels that the leadership of this community is up to that challenge.

Implementing the vision need not be the hurried task of a day, a month, or even a year. It may take a decade, but by moving step by step, the possibilities become real and

closer to achievement. Each firm development move will generate its own interest and private sector investment.

The panel foresees more opportunities for managed growth to take place, which will end unsustainable development in one area of the county and a cycle of disinvestment in another.

Southwest

An examination of an expansion of the South County CRA should be undertaken in order to provide upgrades to each neighborhood and help property owners upgrade their operations and assist if needed in the acquisition of parcels for development. In order to be as effective as possible, the CRA needs to be expanded to include commercial properties and parcels with the greatest development potential, and needs to be available to assist when needed with the recommended transportation improvements.

Since the creation of the South County CRA, land values have plummeted; thus, the time to expand it is now. The best time to undertake an expansion is when values are low so that the increment captured can be reinvested and put to the best use. In this area, the panel recommends that the county focus on the development of high-quality infill housing before taking any action, which may be necessary to remove any blight.

In addition, the existing neighborhoods need to meet or exceed the standard public amenities provided in Lakewood Ranch. In order for property values to be stabilized and for neighborhoods to be able to compete, investments in sidewalks, street trees, and streetlights are needed. Neighborhood residents have asked for these improvements and they should be provided. Such improvements should be paid for on a first-come-first-served basis at first, with the county inviting neighborhoods to create a special assessment district. The county would then match the funds raised in order to make the necessary public realm improvements.

In addition to making improvements in the public realm, the county should consider site-specific improvements—particularly to existing or potential housing sites. These

can be financed through a variety of means, but principal among them are housing tax credits, which will be described in more detail in the financing section at right.

Using an expanded CRA, Manatee County would be positioned to provide appropriate incentives, including reduced permitting costs, increased product quality, and reduced infrastructure costs. So, through a form-based code and a CRA, the county can provide the necessary level of incentives to ensure high-quality development.

Riverfront/Bradenton

In order for success to be achieved in the riverfront areas, regional planning and communication are critical. As the county examines density, partnerships with the incorporated areas will become increasingly important. The panel recommends an examination of the 14th Street West CRA, specifically a potential merger with the South County CRA. Both the county and Palmetto CRA districts north of the river do not have the same potential for growth due to the lack of identified large-scale greenfield development sites.

Parrish

At present, the county has over 43,000 entitled parcels—enough to fulfill more than 45 years of growth. In order to manage, mitigate, and afford this growth east of Interstate 75, a need exists to closely regulate the timing of expansion, the financing, the impact on the existing infrastructure, and the extension of infrastructure and utilities. Without such controls, development will be problematic financially, operationally, and economically. This development pattern will not successfully increase the efficiency of the infrastructure. While remaining market-friendly, the county needs to ensure that measured growth supports the remainder of the county and regulate the timing.

Financing

In general, the panel feels an opportunity exists to look at the county's planning and implementation structure through a lens or focus on economic development. Such an approach would ensure that county investment would be driven by its impact and benefit on Manatee County's

economy. A new approach in governance, such a structure has the potential to quantify returns on investment and show which investments have the potential to deliver the greatest immediate and long-term impact and return.

Moving in the desired direction requires turning a corner and embarking on a different path that leads toward the desired goals. There is no faster or more effective manner to do so than with putting a financial plan in place that moves that process forward. On the basis of their findings, the panelists recommend the following first steps to moving forward.

Actively Compete for National and State Workforce and Assisted Housing Tax Credits

Federal tax credits are awarded each year by the state, in denominations of 4 percent and 9 percent (the more competitive variant). These credits provide equity that can be used for ten consecutive years in the development of a variety of housing types that are needed now in Manatee County. While income restrictions apply to about 20 percent of the units as set-asides for families earning 50 percent of the area median income, or roughly \$30,000 per year, the panel believes that tax credits would be a highly effectively source of equity to rebuild parts of southwest and northwest Manatee with badly needed new workforce housing.

Examination of Impact Fees

The panel suggests expanding a countywide parkland impact fee on all nonresidential uses west of I-75 to increase access to and the acquisition of parks and open space for recreation of all kinds, especially in the existing urban areas.

In addition, the panel recommends reexamination of the current impact fee structure. Similar to the varying of densities between the character districts described in this report, impact fee levels should be set based on actual need, length of time for ROI, and intensity of direct and indirect impacts on the targeted neighborhood or community. In other words, as part of the district focus recommended by the panel, Manatee County should examine the existing

impact fee structure based on the cost of infrastructure upgrades required for that district area.

Economic Development Incentive Grant Program and Other Tools to Encourage Small Business

The panel recommends reviewing the current Economic Development Incentive Grant Program and refining it to target and ensure specific outcomes that benefit the entire county. One direction recommended is to expand the program to allocate a portion for small, high-growth companies requiring upfront dollars for business incubation and acceleration. Resources for this target require peer review and mentoring on a set schedule coupled with a grant or loan. At the same time, it would behoove the county to focus on providing the infrastructure required for and vital to emerging entrepreneurs. As an initial step, the panel recommends gathering existing local entrepreneurs, through a partnership with the Economic Development Corporation and chamber groups throughout the county, to lead new entrepreneurs in identifying service providers for this economic sector including lawyers, accountants, and tradesmen.

Pop-Up Stores. Successful pop-up store programs—such as those in Pittsburgh; Chattanooga, Tennessee; and New Haven, Connecticut—partner a county or city with local property owners to fill empty storefronts by awarding grants, generally between \$1,000 and \$15,000, for a three- to six-month occupancy. This type of program not only focuses on filling those empty storefronts and generating opportunities for local artists and retailers, but also helps build the network of relations and transactions that will bolster the long-term viability of the downtown.

Entitlements

The panel endorses the county leadership's adoption of a "pay-to-play" policy relative to the extension of expiring entitlements. Extension of entitlements from any original expiration date should require the reduction or elimination of impact fee credits. This is especially true when the extension of infrastructure is in areas with limited infrastructure and services.

Special Assessment Districts and CRAs

The panel recommends an overhaul and refocusing of the two existing county CRAs. The panel suggests that the current CRAs in the southwestern quadrant be combined into one CRA whose area generally encompasses the entirety of southwestern Manatee County from the Bradenton city limits to the bay on the west, to the Sarasota County line on the south, and near I-75 to the west, as well as other investment concepts.

Such reorganization will enable the county to make targeted investments for necessary infrastructure improvements without raising new taxes or fees in that area. Also, such a restructuring would immediately enable the county to capture the current low valuation of real estate in that area and reinvest the totality of the increment gained as the area revives. Moreover, such revival will be accelerated because of the county's focus on reinvestment.

As a part of the revisions to the CRAs, the panel recommends that Manatee County seek to remove impact fees from any investment in the CRA. The reason is simple and logical: All services—water, sewer, roads, libraries, and the like—are already there and do not require new connections to or extension of lines or new capacities to be developed. Rather, the panel suggests the county look at reverse fees that pay developers for "new" connections that more efficiently use existing resources—like the power company paying consumers to acquire energy-efficient appliances.

Infrastructure Bank

The panel recommends the creation of an infrastructure bank funded through a half-cent sales tax. Such a bank would have the ability to raise substantial funds for projects that generate an immediate impact and result in stimulating extensive private sector investment. The Riverwalk is an outstanding example of how such a bank could be used in a very meaningful way.

Public/Private Partnership for Port Manatee

The port, while a vital engine for the county's economy, is a drag on the county's balance sheet. The panel suggests

creating a public/private partnership to operate and invest in the port. Many international companies successfully manage public ports around the world. Most of these partnerships require the private managers to invest their capital and to create financial structures that reduce the public's liability while expanding the public's balance sheet capacity. Such a system would continue to require the county to have its own staff and management working with its selected partner.

Federal Grants for Specific Transportation Investments

The port has been successful in its use of federal Transportation Investment Generating Economic Recovery (TIGER) funds—and should continue using them. The panel encourages the port to focus on federal funding—both TIGER transportation funding and sustainable-communities funding—as it becomes available.

Conclusion

MANATEE COUNTY FINDS ITSELF at a crossroads, and the panel believes that the community's choices at this time about growth, density, and place making will have a significant impact far into the future. As the panel previously iterated, the *How Will We Grow?* report is a crucial first step for the county's leadership and citizens in learning how to make strategic decisions about land use and infrastructure investment, but there are many steps beyond that which must be taken.

The panelists' recommendations focus on leveraging Manatee County's existing assets with new or more robust tools. As articulated throughout this report, the county possesses a number of assets that set it apart from its neighbors. The key is to use those unique features to guide future growth in a way that serves the diverse needs of the county's residents, while simultaneously creating a sense of place that will drive market demand and reputation into the future.

About the Panel

Michael Maxwell

Panel Chair

Miami, Florida

Nationally recognized for achievements in urban development, complex workouts, and real estate education, Michael Maxwell has acquired, developed, or restructured nearly \$1 billion in real estate assets in Florida, the Caribbean, and Latin America.

Maxwell's real estate career encompasses executive, operational, financial, and construction management roles. A skilled and effective communicator, he serves as a state and federal expert witness on real estate issues. His work has been honored with awards for innovation, historic preservation, and regenerative urban redevelopment, including the Urban Land Institute's 2011 Robert M. O'Donnell Award and a national 2013 NAIOP Distinguished Fellowship.

Maxwell began his career with a homebuilder, subsequently holding progressively responsible public and private sector positions in development, finance, construction, and workouts. As vice president of Codina Development, he led the development of 1 million square feet of Class A product, creating the innovative and award-winning Beacon Center, a \$400 million, 200-acre business park in Miami.

In 1992, Maxwell founded the development and advisory firm MAXWELL+Partners LLC. As developers, his team orchestrated the successful acquisition, development, and restructuring of nearly \$1 billion of office, industrial, retail, residential, and resort properties. As advisers, the firm serves lenders, investors, and other clients with strategy, due diligence, development completion, workouts, and expert witness services. A licensed real estate professional,

Maxwell holds the prestigious AICP designation from the American Institute of Certified Planners.

Appointed in 2010 as lead faculty and director of the Nova Southeastern University (NSU) graduate real estate development program, Maxwell led two student teams to first place in both the 2010 and 2012 South Florida NAIOP Collegiate Challenges. Previously, he served as adjunct professor of real estate at NSU's and Florida International University's programs and as a visiting lecturer at other universities.

A full member of the Urban Land Institute, Maxwell has served since 2002 on the Florida/Caribbean District Council Advisory Committee; co-vice chaired the Institute's 2008 Fall Meeting in Miami; and led or served on ten national ULI advisory panels. He is a board member of NAIOP's south Florida chapter and a national 2013 NAIOP Distinguished Fellow. He served ten years as founding chairman of the Greater Miami Urban League's housing arm, New Urban Development LLC. His community leadership includes the following: Leadership Miami, Miami Country Day School, Bonnet House Museum, Dade Heritage Trust, the Florida Trust for Historic Preservation, historic Gusman Theater, and the University of Virginia South Florida Alumni Association.

Maxwell earned a master's degree in real estate development and urban design from the University of Virginia and a bachelor of arts degree in city planning from the University of Texas at Austin.

Thomas Hester

Tempe, Arizona

Thomas Hester is a regional place-making manager and the urban design practice leader for Parsons Brinckerhoff.

Hester has earned a national reputation for his ability to help public and private sector clients strategically position community and development projects, and improve their overall performance and viability. His strong leadership and management skills have helped diverse groups build consensus and attain project goals. Hester brings effective skills in architecture, urban design, community planning, transportation planning, real estate finance and development, public and private partnerships, zoning, and design guidelines to his projects. Throughout his career, he has been a speaker at professional conferences, lectured at universities, and published articles in professional journals.

Hester has taught architecture, planning, and design at California State Polytechnic University at Pomona and Otis College of Art and Design, and is a member of the Urban Land Institute, where he has participated in a number of forums and Advisory Services panels as well as taught at its Real Estate School.

At present, Hester is designing great places with communities in Oklahoma City, Salt Lake City, Wichita, Kansas City, and Lewisville and McKinney in Texas. In Oklahoma City, he is helping the community design a “great street” created from the relocation of Interstate 40 outside of the downtown core. The new Cross-town Boulevard will be Oklahoma City’s most iconic street and connect downtown to a new Hargreaves-designed Central Park.

Hester earned a master of architecture in urban design from Harvard University’s Graduate School of Design, where he earned top honors for leadership and academic studies, and a bachelor of architecture from California State Polytechnic University in Pomona.

Anita Kramer

Washington, D.C.

Anita Kramer is vice president, ULI, for Capital Markets and Real Estate. In this position, she wrote the monthly “U.S. Real Estate Business Barometer,” an analysis of 90 leading indicators of the economy, real estate capital markets, housing, and commercial/multifamily properties.

She directs the annual *China City Survey* and the *Emerging Trends: Asia Pacific* reports. She also contributes to ULI’s quarterly *Metro Area Real Estate Business Barometer*, as well as a quarterly survey of leading real estate economists.

Kramer joined ULI as senior director, retail and mixed-use development. In this position, she directed research, education, and programs in the area of retail and mixed-use development and was responsible for the biannual *Dollars & Cents of Shopping Centers*, the *Retail Development Handbook*, *Retrofitting Office Buildings to Be Green and Energy Efficient*, and for other research programs: *Retail Opens Up! The Shape of Today’s Open-Air Retail Centers* and *Residential Over Retail: How to Make It Work*. Kramer also coproduced ULI’s annual Reinventing Retail conference in Beverly Hills, California, and was responsible for responding to media inquiries.

Prior to joining the staff of ULI, Kramer was a consultant for 28 years, performing economic and financial analyses for both private and public clients involved in development and land use strategies. This work emphasized market research, links between market findings and financial or fiscal options, economic development strategies, and impact analyses. She founded Anita Kramer & Associates in 1992, following her position as vice president of the Natelson Company in Los Angeles.

Kramer’s consulting work included the following: economic development analysis of the North Tryon, Freedom Drive, West Trade/Beatties Ford Road, and Independence Boulevard corridors in Charlotte, North Carolina; feasibility analysis of infill housing in downtown Pittsburgh; an economic development strategy for an underserved area of Landover, Maryland, which focused on retail, office, entertainment, industrial, and conference center markets; market analysis of infill housing in downtown and close-in neighborhoods of Tucson, Arizona; retail market analysis of the aging commercial center of Annandale in Fairfax County, Virginia; market analysis of rehab potential of commercial properties for second-story residential use in Allentown, Pennsylvania; market reconnaissance for

residential development in a traditional neighborhood design in North Augusta, South Carolina; a feasibility study for a town center concept in Mashpee, Massachusetts, that incorporates retail, office, and hospitality development; and residential and commercial market analysis for the Columbia Pike Corridor in Arlington County, Virginia, to identify the area's potential to participate in the general affluence of the rest of the county.

Kramer holds a master's degree in city and regional planning from Harvard University, where she specialized in housing and community development. She received her BA *cum laude* in economics and urban studies from the University of Rochester.

Bob Lewis

St. Louis, Missouri

Bob Lewis directs redevelopment planning, economic planning, market analysis, and implementation assignments at Development Strategies, based in St. Louis. He was part of the team that created Development Strategies in 1988 after ten years with Team Four and two years with the St. Louis County Department of Planning. Lewis was named president in 2000.

The focus of his professional work is analyzing the market and economic and organizational forces that influence urban planning, economic growth, and real estate development. The clients for his consulting services include local governments, private property owners, corporations, government agencies, nonprofit organizations, and institutions around the country. Development Strategies has served clients in 42 states since 1988.

Lewis is a certified economic developer (CEcD) within the International Economic Development Council (IEDC) and a member of the American Institute of Certified Planners (AICP) of the American Planning Association (APA). He is also a former president of the APA's Missouri chapter and is immediate past chair of the economic development division of the APA. Lewis teaches the real estate redevelopment and reuse certification class for the IEDC

each year. He has also served on four previous ULI Advisory Services panels and chaired a ULI St. Louis technical advisory panel in 2011.

A native of Glencoe, Illinois, Lewis holds a master's degree in city and regional planning from Southern Illinois University at Edwardsville (1976) and a bachelor's degree in business economics from Miami University in Oxford, Ohio (1973). He is a member of the Leadership St. Louis class of 1986–1987.

Daniel Liggett

Indianapolis, Indiana

Daniel Liggett is an urban designer and landscape architect graduate at Indianapolis-based Rundell Ernstberger Associates (REA). REA is a land planning, urban design, and landscape architecture firm with works completed throughout the Midwest. Since joining the firm in 2010, Liggett has participated in all phases of design, including master planning, site design, construction documentation, and graphic design.

His recent work includes contributing toward site design projects, most notably the Indianapolis Cultural Trail, an urban bicycle and walking trail that connects the cultural districts of Indianapolis.

Liggett's academic research focused on framework master planning, increasing livability in cities, and housing development typologies. He is a guest reviewer at Ball State University in both the urban design and landscape architecture programs. A member of the Young Leaders Group in Indiana, Liggett serves as an associate member at large on the executive committee of the Indiana chapter of the American Society of Landscape Architects. He is active in various initiatives that promote the importance of design and landscape architecture at a local level.

A LEED-accredited professional, Liggett received a master of urban design degree in 2011 and a bachelor of landscape architecture degree in 2010, both from Ball State University.

David Panagore

New Haven, Connecticut

David Panagore is the executive director of the New Haven Parking Authority. He has 20 years of experience managing major municipalities and city development organizations.

Previously, Panagore was the chief administrative officer for the city of Hartford, Connecticut, where he managed more than 2,200 staff members and the city's \$554 million budget. He led the city through a significant mayoral transition period. Upon his leaving the city, the *Hartford Courant* called him "an urbanist with vision." Panagore also served as chief development officer, a position in which he led the city through a community-driven comprehensive planning process called "One City, One Plan." He was also instrumental in launching the iQuilt arts-based place-making strategy. His efforts at art-based economic development in Hartford were recognized by the National Community Development Association with the Audrey Nelson Community Development Award. During his tenure, he structured three major public/private partnership transactions involving several major Hartford landmark properties.

Prior to Hartford, Panagore was the chief development officer for the city of Springfield, Massachusetts, where he spearheaded a number of development projects and corridor initiatives. He arrived in Springfield as the deputy executive director serving as the state's overseer as part of Springfield's state receivership.

Panagore has also led major development projects in San Jose, California, and Boston. In San Jose, he worked for the San Jose Redevelopment Agency, a position in which he managed the Story & King Retail Revitalization Project, a \$150 million, 275,000-square-foot development on 24 acres. He managed the North San Pedro Project, which involved 14 development sites on 9.3 acres slated for roughly 750 market-rate and affordable homes; retail and grocery uses; and \$14 million in public improvements. Other duties included the San Jose Performance and Event

Center Study, and also project management of the first luxury housing development downtown.

While working for the Boston Redevelopment Authority, Panagore served as the project director for the new Boston Convention and Exposition Center, a \$700 million, 1.9 million-square-foot project with a 1,200-room hotel. Related actions include the following: 68-acre site acquisition, 92 business relocations, and demolition of 30-plus structures. Duties included asset management of 1 million square feet of space; state and local development permitting; community relations; urban design; transportation and infrastructure oversight; and financial management.

David S. Pandoli

Charlotte, North Carolina

David Pandoli is a land planner and principal at Woolpert Inc., a 700-person international architecture and engineering firm. He is responsible for large-scale master-planning services for the Southeast division of the firm's planning and development service line. He has extensive experience in leading multidisciplinary design teams, directing them in the preparation and implementation of large-scale master-planning efforts.

Pandoli's responsibilities include directing the firm's hospitality planning and development practice areas. He also has experience with community development projects, recreation and resort development projects, and mixed-use planning and development projects. Pandoli has completed numerous design and construction projects in the southeastern United States and in the Caribbean as well as several assignments in the Middle East. He has more than 33 years of experience in representing development clients, providing a wide range of product deliverables and services.

Pandoli is an active member of ULI, having served on multiple ULI Advisory Services panels, and in project analysis sessions. He is a past member of the Small-Scale Development Council, has served on the Community Development Council, and is a member of the Recreational

Design Council. He is also an active member of NAIOP, the Design-Build Institute of America (DBIA), the Construction Specifiers Institute (CSI), and the American Society of Landscape Architects (ASLA).

Prior to joining Woolpert, Pandoli served as the assistant director of planning and development for the city of Sunrise, Florida, a role in which he was responsible for the design and implementation of the five-year, citywide \$150 million capital improvement program.

Pandoli is a past vice president of Edward D. Stone Jr. and Associates (EDSA), where he managed multiple large-scale recreational and resort projects throughout the Caribbean over a 15-year period.

He is a graduate of Ohio State University, where he received a bachelor of science degree in landscape architecture.

Jon C. Suddarth

Aurora, Colorado

Jon Suddarth is a senior real estate market analyst specializing in real estate development and market/financial analysis. Suddarth specializes in profiling the socioeconomic characteristics of various markets and asset types to determine the real estate demand for a trade area and, more specifically, a subject area/subject site. He specializes in the calculation and Excel modeling of financial-related real estate analysis, and has programmed and modeled economic feasibility and discounted cash flow analyses regarding a variety of real estate (and non-real estate) uses.

In March 2005, Suddarth joined THK Associates Inc. as a market analyst and has worked in numerous markets and on a variety of projects throughout the United States and internationally. Projects of note include the Roosevelt Lofts bankruptcy litigation case in Los Angeles; strategic repositioning and downtown revitalization efforts for the downtown district in Boulder, Colorado; analytical research for a portfolio of loans for convenience stores in various locations along the Eastern Seaboard; a strategic develop-

ment plan for the Dar Al Arkan real estate development in Riyadh, Saudi Arabia; the Villas del Este master-planned community near San Juan, Puerto Rico; the University of Colorado Medical Center and strategic redevelopment in Denver; multifamily market analysis and growth strategy for a national multifamily real estate investment trust (REIT) in metro Phoenix and Tucson, Arizona; the Conroe Regional Medical Center Office Plaza near Houston; the economic development and growth strategy for the city of Battle Creek, Michigan; and the 1,287-acre Denver International Airport commercial development parcel.

He is a member of ULI's Young Leaders of Colorado, the NAIOP Developing Leaders Program, and the University of Denver Real Estate Roundtable.

Suddarth has a master of science in real estate and business administration from the University of Denver and a bachelor of business administration with a concentration in international business from the University of Kansas.

