

Major Employment Center Land Use Study

June 21, 2007

Agenda

- Introductions
- Project Overview
- Major Employment Centers
- County Trends
- Stakeholder Concerns
- Supply/Demand Scenario Analysis
- Vision & Goals
- Preliminary Recommendations

Project Overview



Project Overview

Project Goal:

“Assess assigned land uses in the current MECs to determine whether they are aligned with the County’s economic development goals and projected employment and economic trends and to provide necessary implementation strategies for this future land use designation.”

Project Overview

Project Phases:

I. Inventory/Profile

II. Issues and Opportunities Analysis

III. Major Employment Center Analysis

**IV. Vision Statement and Policy
Development**

V. Implementation and Action Plan

VI. Executive Summary and Final Study

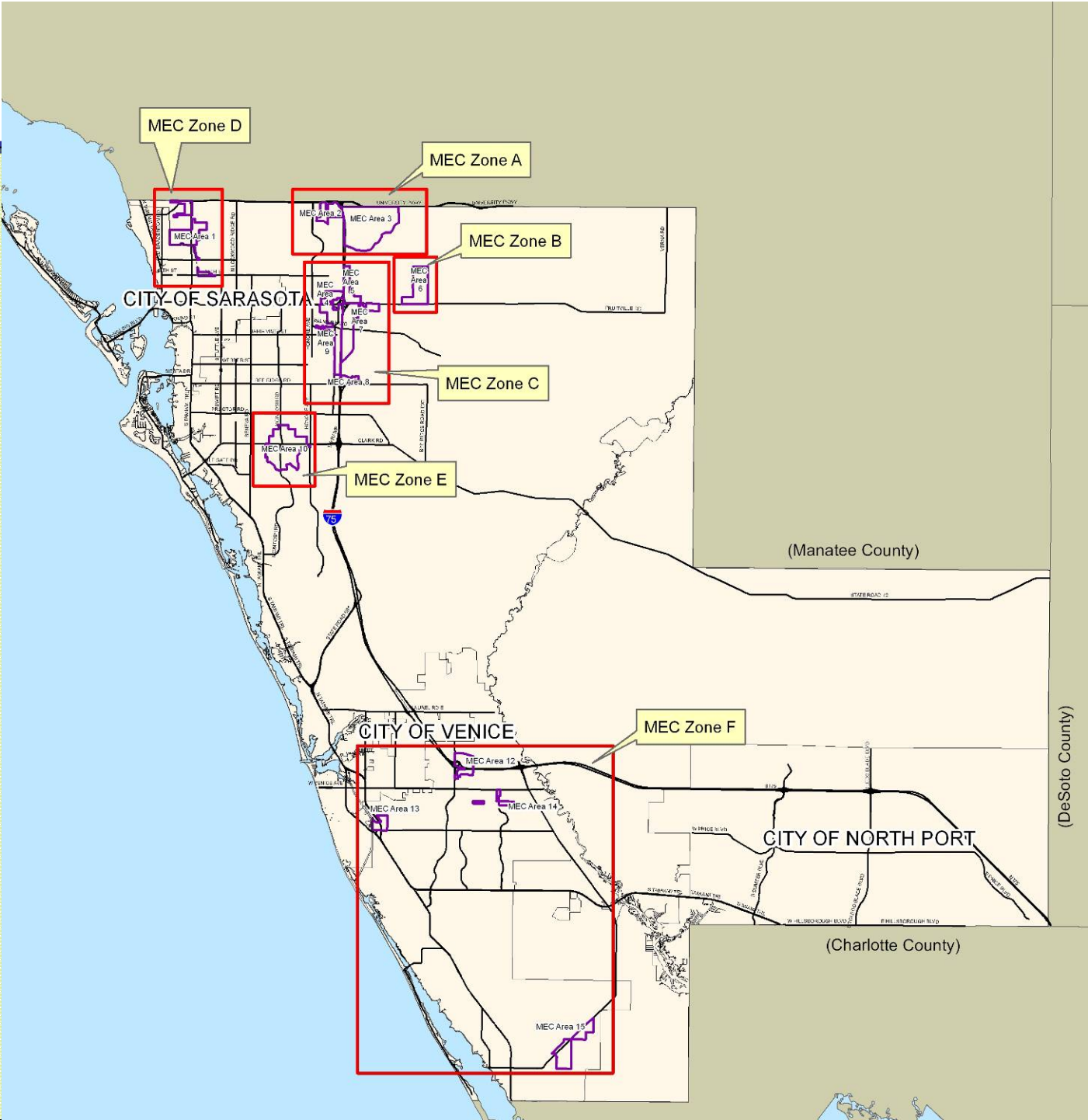
Project Overview

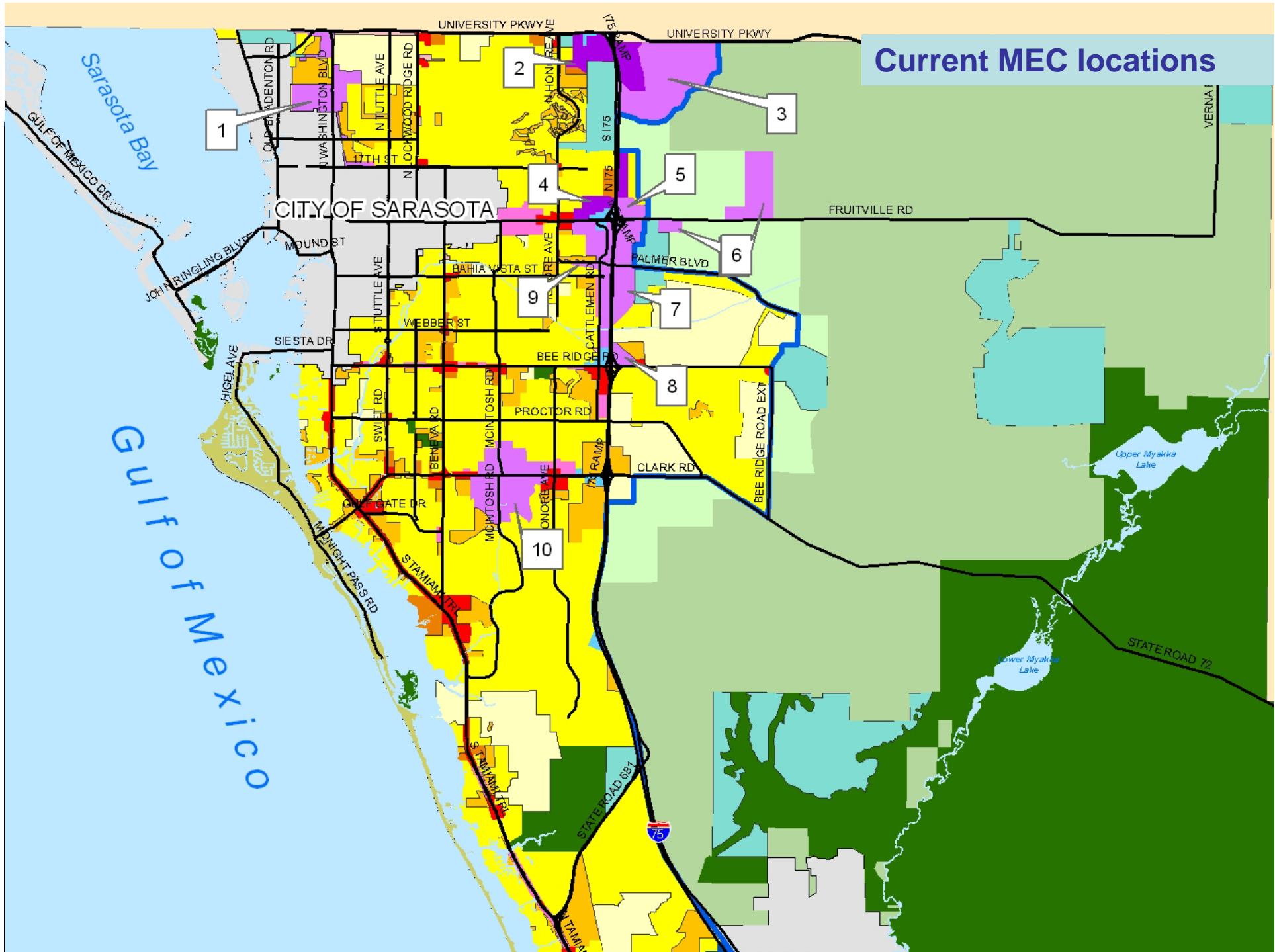
- Work to Date
 - Stakeholder Interviews
 - County Profile
 - Website Development/GIS Mapping
 - Issues and Opportunities
 - MEC core analysis
 - Scenario analysis of supply & demand for office and industrial space
 - Review session with County
 - Proposed Vision
 - Best Practices Review
 - Preliminary Recommendations
 - Web X Presentation with Technical Committee

Major Employment Centers

- What are MECs?
 - Major Employment Centers are planned or existing concentrations of industrial, manufacturing, wholesale, and office employment
 - Large enough to provide separation from surrounding land uses and internal site planning
 - On major transportation routes/accessible to workers
 - Often planned through DRIs

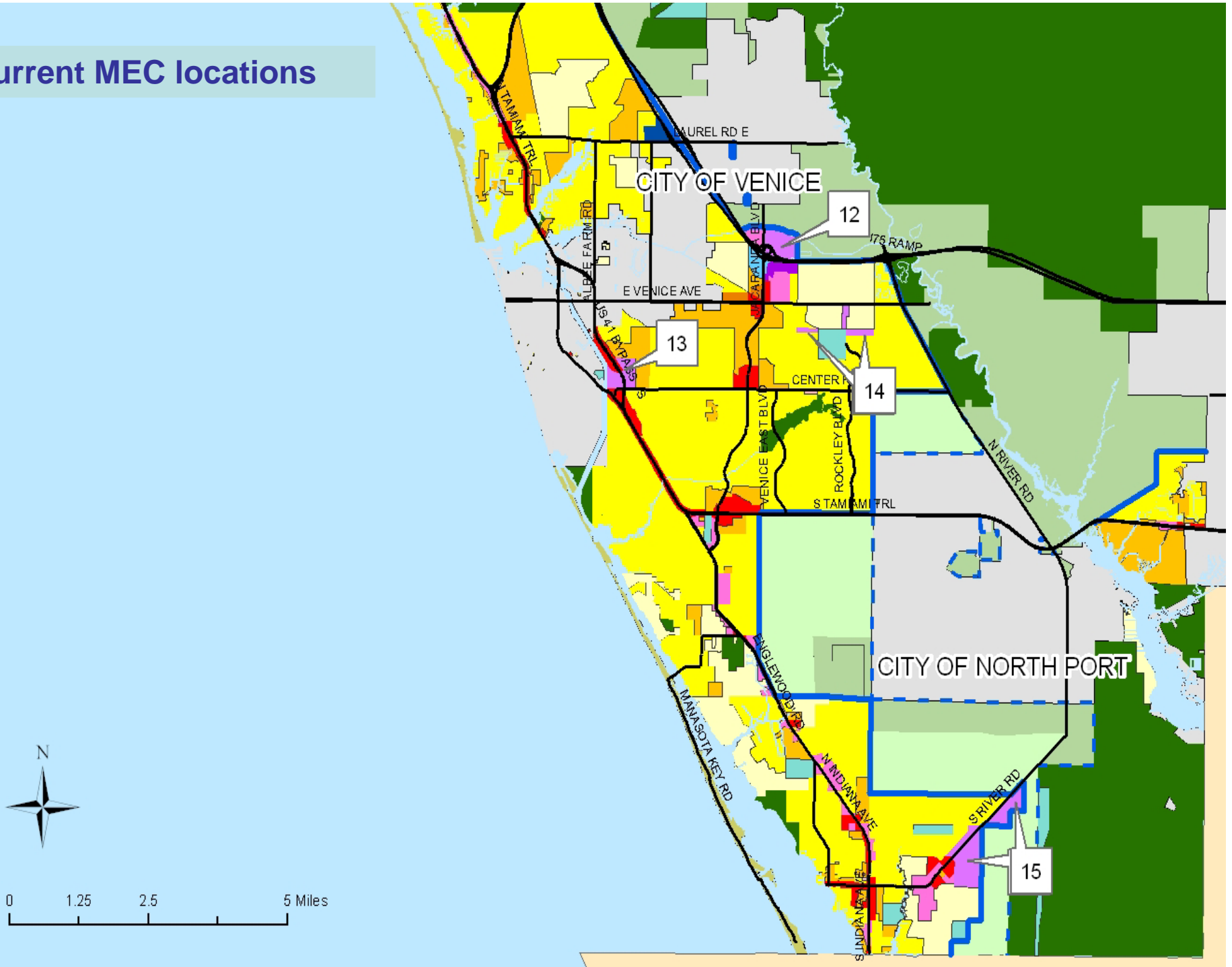
MEC Location Map





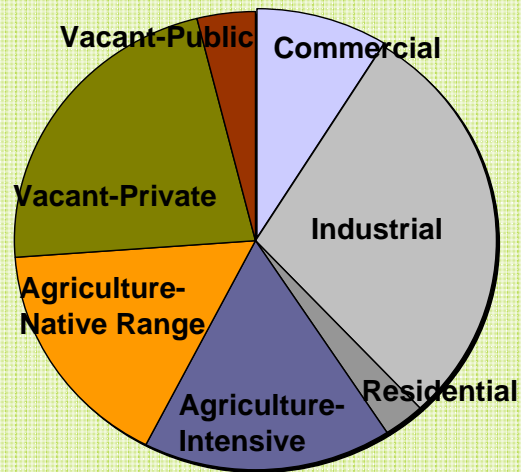
Current MEC locations

Current MEC locations

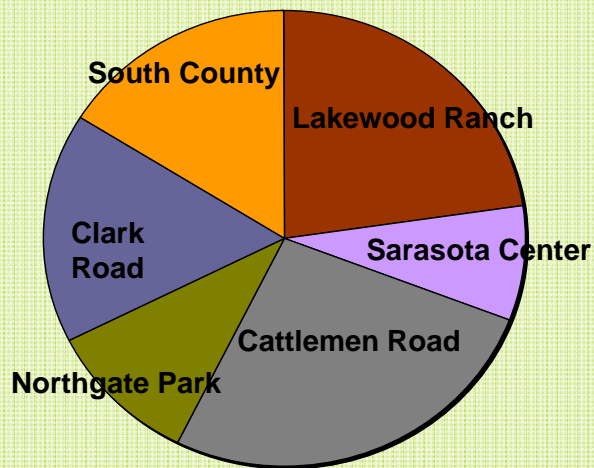


MEC Land Use Summary

MEC Acreage - by Use



MEC Acreage - by MEC Zone



- 15 MECs across Sarasota County, with the highest concentration in North County
- MECs contain 6,300 gross acres
 - 4,400 *net* acres of usable land
 - 2,400 acres of vacant land

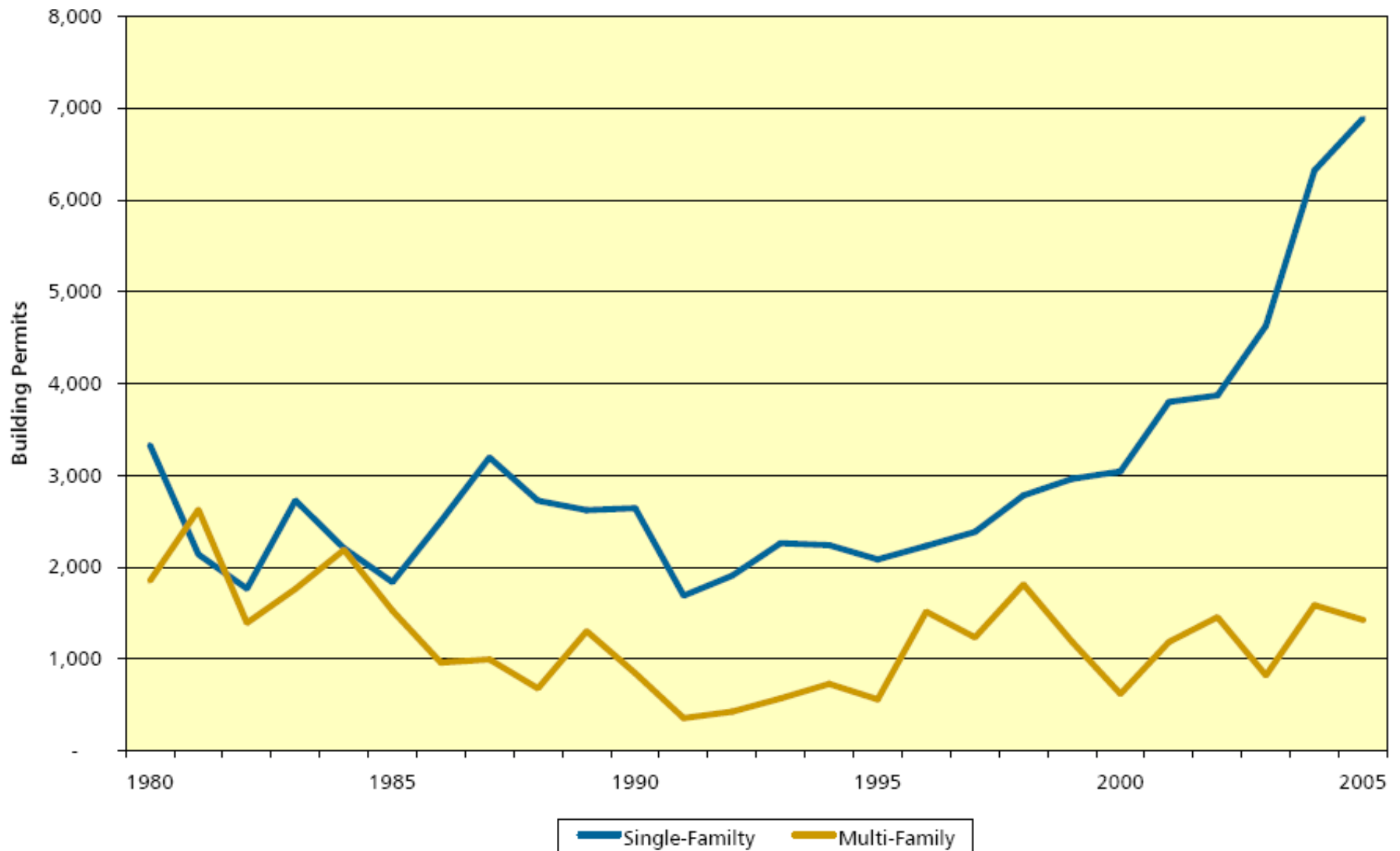
Demographic & Economic Trends



Demographic Trends

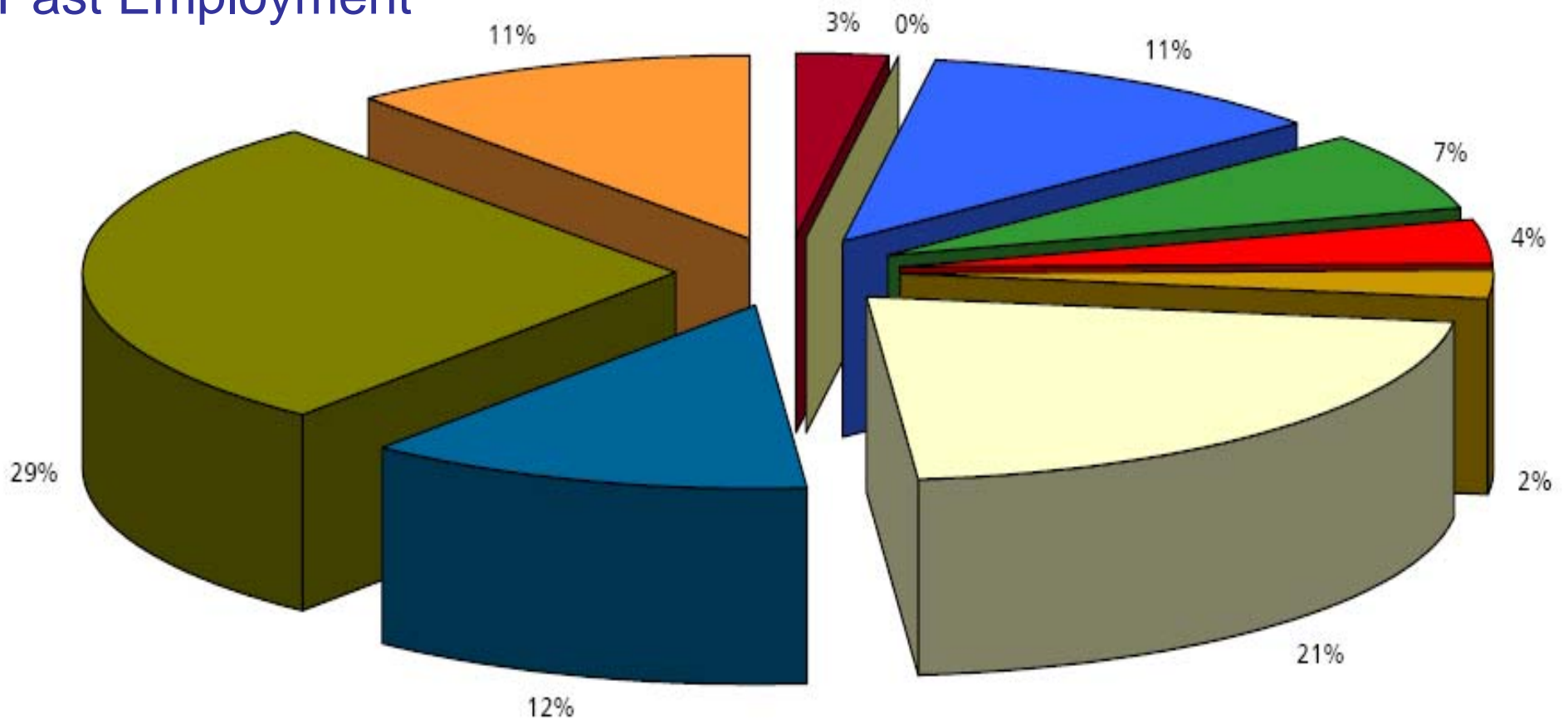
- 4,400 housing starts annually since 1980
- *Fastest* growth in South County
- These trends create significant pressure for MEC conversion to residential use

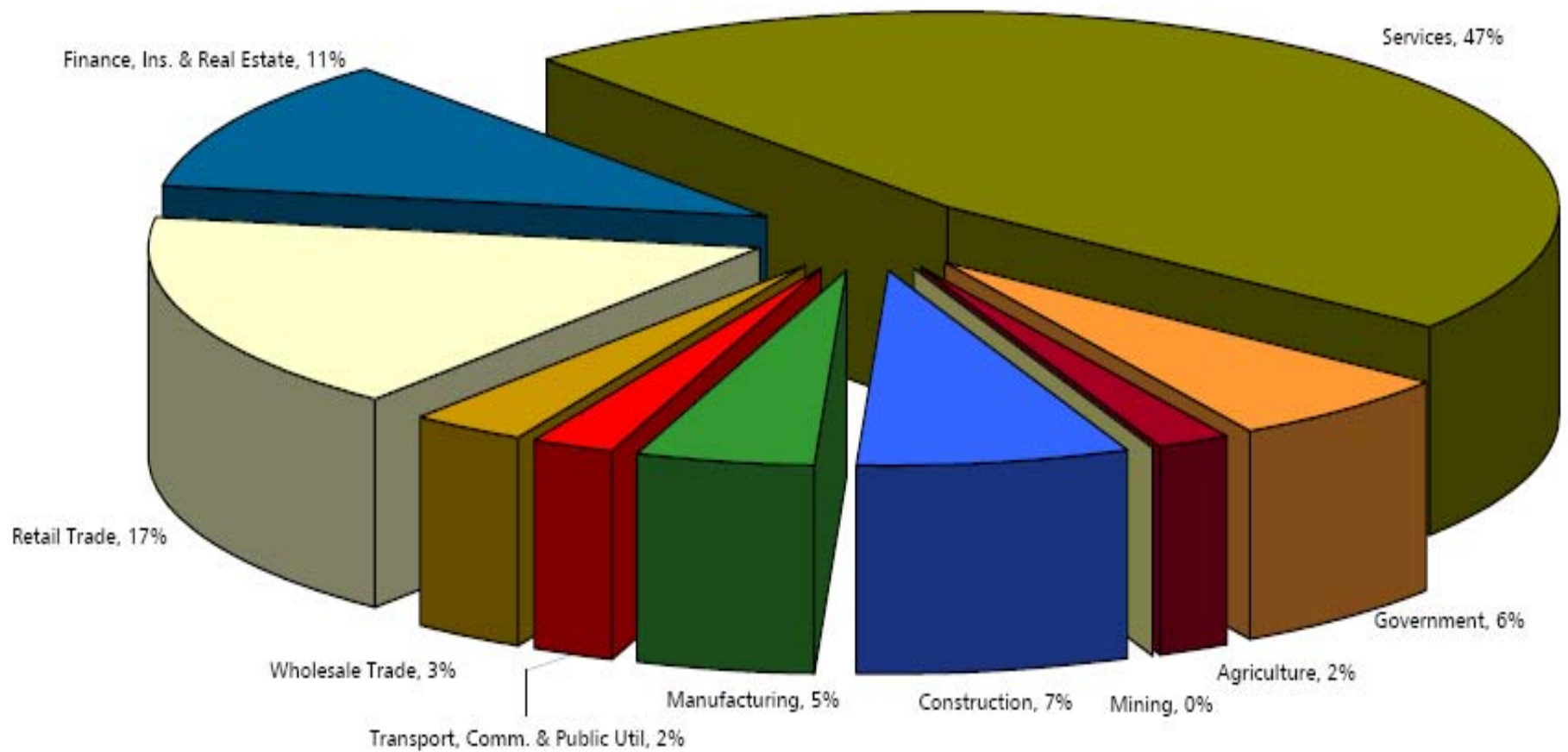
Demographic Trends



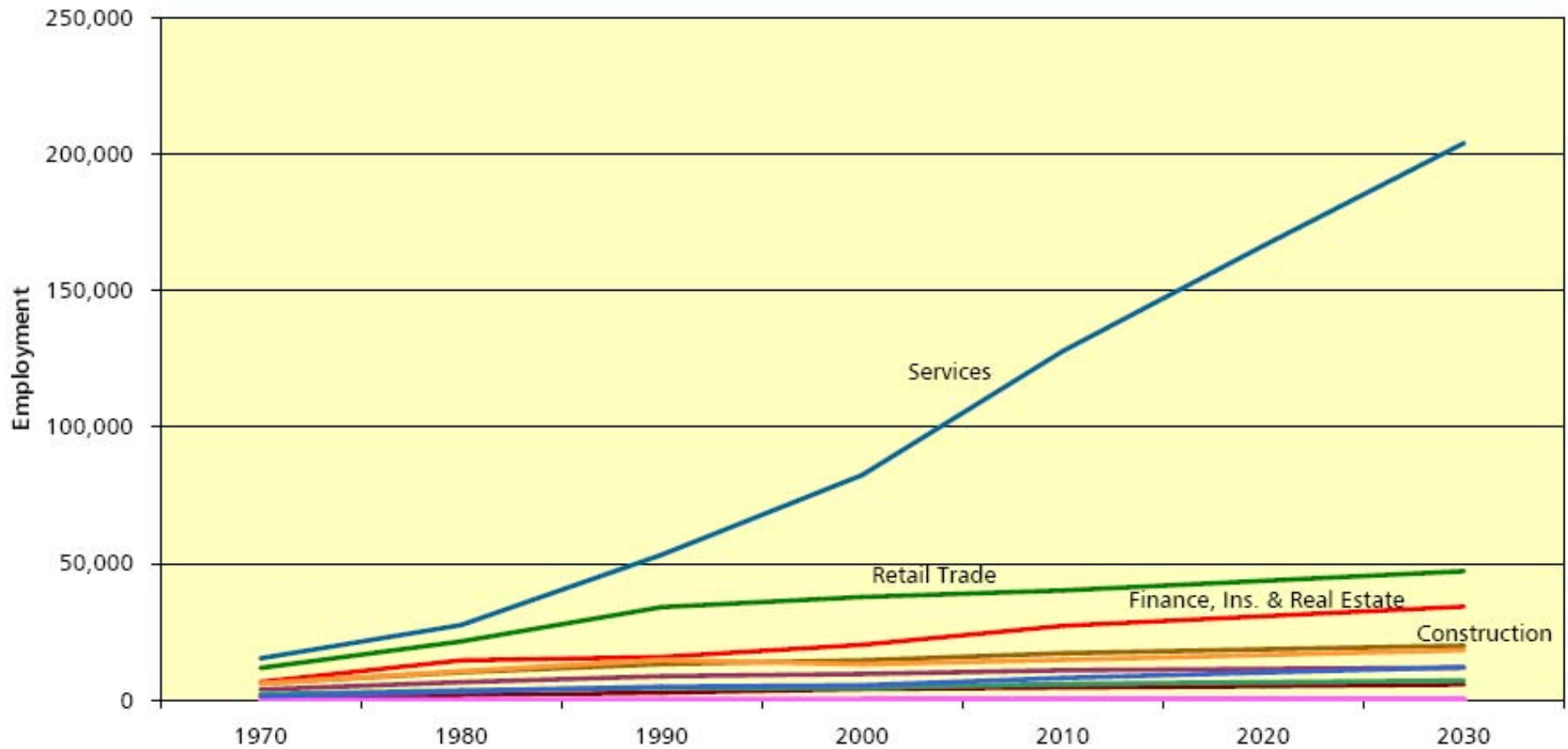
Employment Trends

Past Employment





Employment Trends



Long-term Economic Vitality

- Many of the County's largest employers are public sector institutions & hospitals
- Disconnect: jobs (North) vs. households (South)
- Few linkages, limited depth among industries related to high-technology fields
- No immediate economic "engine" like major university or research facility to generate spin-off jobs
- In "ED", County is competing with its neighbors *and* jurisdictions in other states

Stakeholder Input



The Big Ideas

1. Land Use & Character

- What types of land uses in and around the MECs ?
- What type of character in the MECs (scale & style)?

2. Location

- Where should the MECs be located?

3. Economic Vitality – Employment Opportunity

- Where we are now?
- What types of jobs do we want in our community?
- How do we achieve this job growth?

The Big Ideas

1. Land Use & Character

- a) Industrial land uses cannot compete with most other land uses for the same land on a cost basis.
- b) Holding the line on the Urban Service Area creates demand for all types of land uses. This demand could potentially be met through encouraging redevelopment and infill, but little redevelopment and infill is actually being approved.
- c) Each existing MEC is in a unique surrounding context and needs to be planned to be compatible with surrounding land uses. There is no one-blueprint-fits-all for MEC development.

The Big Ideas

2. Location

- a) Major employment land uses cannot be planned in isolation from the regional context. Land use plans for Sarasota County's cities and adjacent counties are relevant to the study.
- b) It may make sense to identify locations for future MECs in advance of development trends and infrastructure provision while land costs are lower. There are current opportunities to do this in central and south Sarasota County.

3. Economic Vitality – Employment Opportunity

- a) Sarasota's quality of life is the main engine for its economic development, but land and labor expenses must be reasonable to allow new companies to relocate to the county.

Supply & Demand Analysis

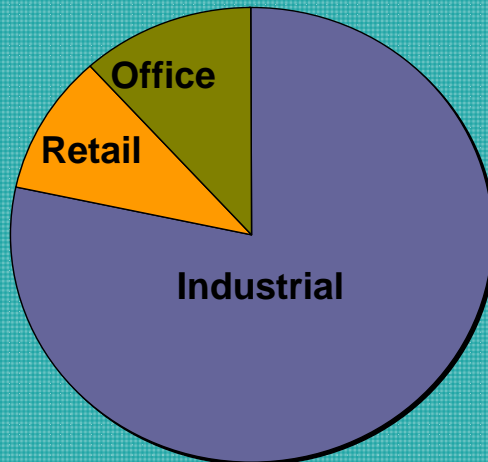


Office & Industrial Demand

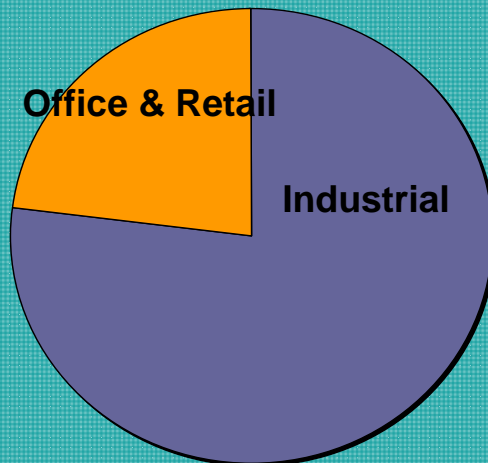
- Employment Growth from 1990 to 2006 generated 80,000 new jobs county-wide
- Forecasts suggest an additional 123,000 jobs through 2030
- 392,000 SF of annual demand from new Office employment
 - 40% of employment from office demand at an average of ~200 SF per employee
- 273,500 SF of annual demand from new industrial employment
 - 20% of employment from industrial demand at an average of 475 SF per employee

MEC Summary - Uses

**MEC Commercial Use
by Square Feet**



**MEC Commercial Use
by Acres**



- MECs contain 15.6 million SF of “workplace” uses (office, industrial, retail)
- Estimated overall densities are quite *low*
 - 6% floor area ratio (FAR)
- 12.2 million SF of industrial
- 1.6 million SF of office
- 1.8 million SF of retail

Development Scenarios

- Scenario 1
 - Develop the available vacant land at current densities
 - Includes all non-public undeveloped land in the MECs (agricultural, native range, and vacant-private)
- Scenario 2
 - Develop vacant land at higher densities (average 30% FAR)
- Scenario 3
 - Redevelop appropriate parcels at higher densities (average 30% FAR)
- Scenario 4
 - Develop vacant land at higher densities and redevelop appropriate parcels at higher densities

Redevelopment Opportunity



MEC Zones	Office - Class C or Below (%)	Industrial - Below Class C (%)
MEC A	3.8%	10.0%
MEC B	7.1%	15.0%
MEC C	6.1%	17.8%
MEC D	26.7%	30.2%
MEC E	41.4%	20.3%
MEC F	75.0%	9.7%

Source: CoStar Property Research; Economics Research Associates, 2007

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Scenario 1 - Summary

Market demand for office space (2000-2030)

11,760,000 SF

Office space accommodated by Scenario 1

6,175,000 SF

Additional space required to accommodate growth

5,585,000 SF

Market demand for industrial space (2000-2030)

8,205,000 SF

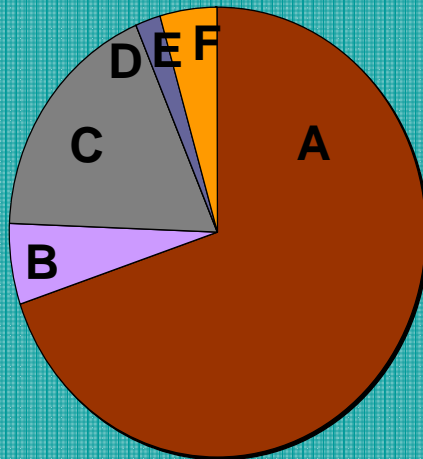
Industrial space accommodated by Scenario 1

11,433,000 SF

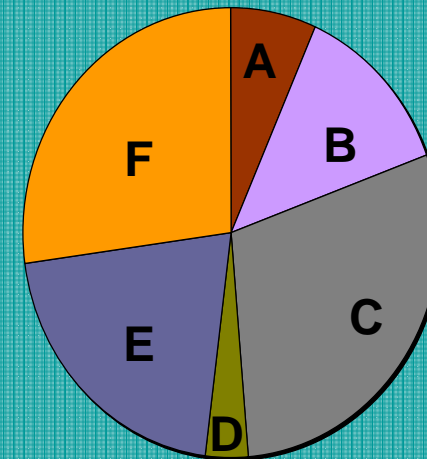
Additional space required to accommodate growth

(3,228,000) SF

Where can growth be accommodated?



Where can growth be accommodated?



Total additional demand for space

2,357,000 SF @ .15 FAR

361 Acres

Scenario 2 - Summary

Market Demand for office space (2000-2030)

11,760,000 SF

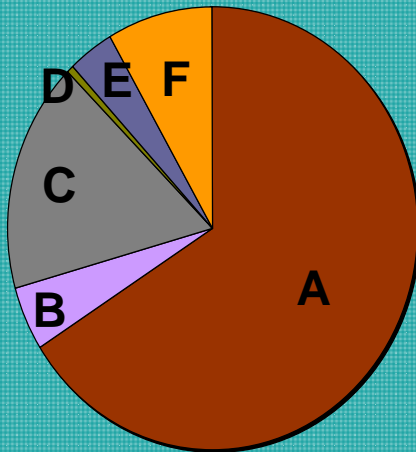
Office space accommodated by Scenario 2

13,090,000 SF

Additional space required to accommodate growth

(1,330,000) SF

Where can growth be accommodated?



Market demand for industrial space (2000-2030)

8,205,000 SF

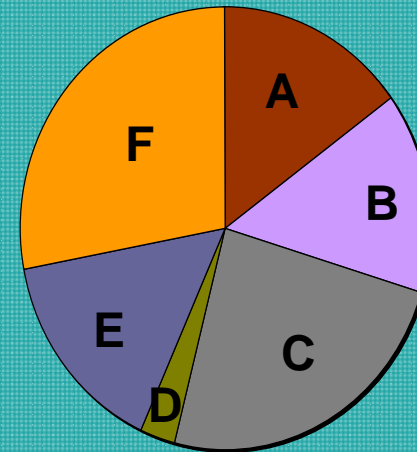
Industrial space accommodated by Scenario 2

16,815,000 SF

Additional space required to accommodate growth

(8,610,000) SF

Where can growth be accommodated?



Total Additional Demand for space

(9,940,000) SF @ .30 FAR

0 Acres

Scenario 3 - Summary

Market Demand for office space (2000-2030)

11,760,000 SF

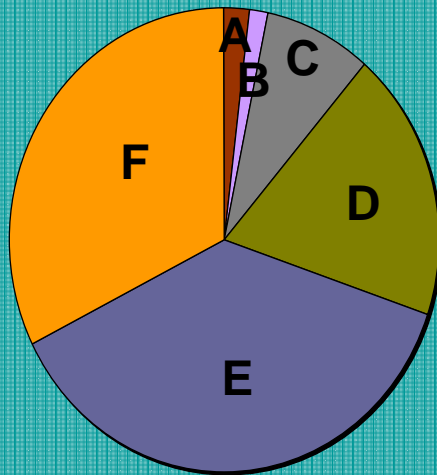
Office space accommodated by Scenario 3

723,000 SF

Additional space required to accommodate growth

11,037,000 SF

Where can growth be accommodated?



Market Demand for industrial space (2000-2030)

8,205,000 SF

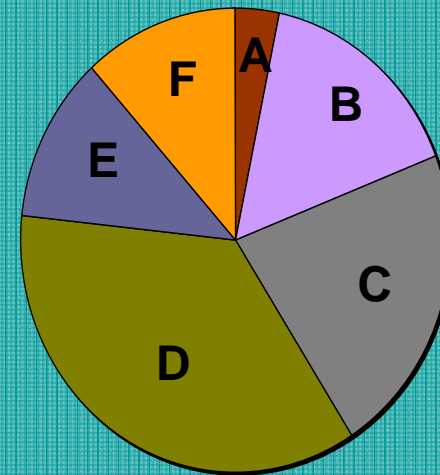
Industrial space accommodated by Scenario 3

528,000 SF

Additional space required to accommodate growth

7,677,000 SF

Where can growth be accommodated?



Total additional demand for space*

18,714,000SF @ .30 FAR

1,432 Acres

**(does not include development of vacant land, only redevelopment of some existing parcels)*

Recommended Scenario

Scenario 4 – Redevelop + Infill in MECs

- Forecasts indicate sufficient land to accommodate office and industrial development within existing MEC lands
- Develop vacant land at higher densities and redevelop appropriate parcels at higher densities
- Pay attention not just to acreage, but also to transportation, location, cost, and parcel size
- Focus on redevelopment of more urban MECs
- Identify new locations for South County MECs and potentially expand of MEC 12

Project Vision



Project Vision

Project Vision:

A balanced land use pattern which promotes a diversity of employment, business, and economic growth throughout the county in such a way that protects the quality of life of Sarasota's residents and increases the sustainability of its activity patterns.

Project Goals

1. Promote the economic development goals of the county, including a diversified economic base
2. Provide adequate land for the retention and growth of the existing employers
3. Make the most efficient use of limited land within the urban growth boundary
4. Increase the sustainability of land development patterns and reduce the strain on the roadway system, which is subject to limited funding
5. Seek new opportunities for incorporating workforce housing
6. Make the most efficient use of county funds for promoting economic development

Preliminary Recommendations



Best Practices

Sources for Best Practices:

1. Pinellas County, FL
2. King County, WA
3. Washington County, OR
4. City of San Diego, CA
5. City of Riverside, CA
6. Fairfax County, VA
7. Industrial Real Estate Development, 3rd Ed.

Create Exclusive Industrial Districts

- Industrial land uses cannot compete with other land uses for price of land
- Large parcels are often needed for certain industrial functions
- The viability of industrial land degrades when it is encroached by sensitive land uses such as residential
- Establish Prime Industrial designation to increase barriers to non-industrial development in certain areas
- Prepare lands for industrial development through “Ready for Growth” relocation planning
- Establish infrastructure incentives for industrial development

Require Balanced Mixed Use Centers

- Promote **mixed-use, transit-oriented, pedestrian-oriented** centers, which reduce roadway demand and increase sustainability
- Office employment, retail, housing, and institutional land uses can be compatible and developed in a pedestrian oriented framework much like **form base codes** prescribe
- Encourage **workforce housing** within walking distance of employment
- Develop **recommended ratios** of workplace, retail, and residential uses in Mixed-Use Centers
- Limit the retail in each Mixed-Use Center so that it serves the local community and not the entire region, also to encourage a **proper balance of land uses**

Increase Densities of Existing MECs

- Current land is being used inefficiently – 6% FAR
- Use limited MEC land **more efficiently** – require higher density
- Encourage employment-intensive land uses (i.e. not warehousing and distribution)
- Work to mitigate development ceilings in **DRI agreements**
 - Mixed use development – better balance of land uses
 - Increase internal trip capture
 - Promote increase transit use / create minimum transit ridership share for new developments

Redevelop Existing MECs

- Create a long term strategy to transition from a greenfield development to **redevelopment**
- Create detailed plans for key redevelopment districts with special values, i.e. near the airport
- **Monitor** amount of redevelopment occurring as well as the amount of obsolete industrial buildings
- Consider waiving specific impact fees associated with redevelopment
- Provide public financing and/or tax credits for demolition and land preparation associated with redevelopment
- Allow greater density & regulatory flexibility for redeveloped sites

Use Limited MEC Land More Efficiently

- Decrease open space requirements for specific MECs
- Encourage **greater flexibility on height requirements/** stormwater requirements
- Require equal setbacks for the residential side as for the industrial side of adjacent land uses

Distribute Employment Centers throughout the County

- Divide county into districts and seek to meet the daily needs of each community for employment, shopping, and public services
- Strive for jobs/housing balance in each community within the county
- Set aside adequate land for different types of employment in each geographic community
- Create **new MECs in south county** in coordination with Venice and North Port

Next Steps



Next Steps

- Obtain input from County officials
- Refine details on recommended policies
- Final presentation to Board of Commissioners
 - September 26, 2007
- Regular Website Updates
 - <http://scgov.net/MEC>

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