

APPENDICES

East Tampa Draft Strategic Action Plan

APPENDIX 1: FLORIDA STATE STATUTE 163.670

Powers; counties and municipalities; community redevelopment agencies

(1) Counties and municipalities may not exercise the power of eminent domain for the purpose of preventing or eliminating a slum area or blighted area as defined in this part; however, counties and municipalities may acquire property by eminent domain within a community redevelopment area, subject to the limitations set forth in ss. 73.013 and 73.014 or other general law.

(2) Every county and municipality shall have all the powers necessary or convenient to carry out and effectuate the purposes and provisions of this part, including the following powers in addition to others herein granted:

- (a) To make and execute contracts and other instruments necessary or convenient to the exercise of its powers under this part.
- (b) To disseminate slum clearance and community redevelopment information.
- (c) To undertake and carry out community redevelopment and related activities within the community redevelopment area, which may include:

1. Acquisition of property within a slum area or a blighted area by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition.
2. Demolition and removal of buildings and improvements.
3. Installation, construction, or reconstruction of streets, utilities, parks, playgrounds, public areas of major hotels that are constructed in support of convention centers, including meeting rooms, banquet facilities, parking garages, lobbies, and passageways, and other improvements necessary for carrying out in the community redevelopment area the community redevelopment objectives of this part in accordance with the community redevelopment plan.
4. Disposition of any property acquired in the community redevelopment area at its fair value as provided in s. 163.380 for uses in accordance with the community redevelopment plan.
5. Carrying out plans for a program of voluntary or compulsory repair and rehabilitation of buildings or other improvements in accordance with the community redevelopment plan.
6. Acquisition by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition of real property in the community redevelopment area which, under the community redevelopment plan, is to be repaired or rehabilitated for dwelling use or related facilities, repair or rehabilitation of the structures for guidance purposes, and resale of the property.
7. Acquisition by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition of any other real property in the community redevelopment area when necessary to eliminate unhealthful, unsanitary, or unsafe conditions; lessen density; eliminate obsolete or other uses detrimental to the public welfare; or otherwise to remove or prevent the spread of blight or deterioration or to provide land for needed public facilities.

8. Acquisition, without regard to any requirement that the area be a slum or blighted area, of air rights in an area consisting principally of land in highways, railway or subway tracks, bridge or tunnel entrances, or other similar facilities which have a blighting influence on the surrounding area and over which air rights sites are to be developed for the elimination of such blighting influences and for the provision of housing (and related facilities and uses) designed specifically for, and limited to, families and individuals of low or moderate income.

9. Acquisition by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition of property in unincorporated enclaves surrounded by the boundaries of a community redevelopment area when it is determined necessary by the agency to accomplish the community redevelopment plan.

10. Construction of foundations and platforms necessary for the provision of air rights sites of housing (and related facilities and uses) designed specifically for, and limited to, families and individuals of low or moderate income.

d) To provide, or to arrange or contract for, the furnishing or repair by any person or agency, public or private, of services, privileges, works, streets, roads, public utilities, or other facilities for or in connection with a community redevelopment; to install, construct, and reconstruct streets, utilities, parks, playgrounds, and other public improvements; and to agree to any conditions that it deems reasonable and appropriate which are attached to federal financial assistance and imposed pursuant to federal law relating to the determination of prevailing salaries or wages or compliance with labor standards, in the undertaking or carrying out of a community redevelopment and related activities, and to include in any contract let in connection with such redevelopment and related activities provisions to fulfill such of the conditions as it deems reasonable and appropriate.

(e) Within the community redevelopment area:

1. To enter into any building or property in any community redevelopment area in order to make inspections, surveys, appraisals, soundings, or test borings and to obtain an order for this purpose from a court of competent jurisdiction in the event entry is denied or resisted.
2. To acquire by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition any personal or real property, together with any improvements thereon.

3. To hold, improve, clear, or prepare for redevelopment any such property.

4. To mortgage, pledge, hypothecate, or otherwise encumber or dispose of any real property.

5. To insure or provide for the insurance of any real or personal property or operations of the county or municipality against any risks or hazards, including the power to pay premiums on any such insurance.

6. To enter into any contracts necessary to effectuate the purposes of this part.

7. To solicit requests for proposals for redevelopment of parcels of real property contemplated by a community redevelopment plan to be acquired for redevelopment purposes by a community redevelopment agency and, as a result of such requests for proposals, to advertise for the disposition of such real property to private persons pursuant to s. 163.380 prior to acquisition of such real property by the community redevelopment agency.

(f) To invest any community redevelopment funds held in reserves or sinking funds or any such funds not required for immediate disbursement in property or securities in which savings banks may legally invest funds subject to their control and to redeem such bonds as have been issued pursuant to s. 163.385 at the redemption price established therein or to purchase such bonds at less than redemption price, all such bonds so redeemed or purchased to be canceled.

(g) To borrow money and to apply for and accept advances, loans, grants, contributions, and any other form of financial assistance from the Federal Government or the state, county, or other public body or from any sources, public or private, for the purposes of this part and to give such security as may be required and to enter into and carry out contracts or agreements in connection therewith; and to include in any contract for financial assistance with the Federal Government for or with respect to community redevelopment and related activities such conditions imposed pursuant to federal laws as the county or municipality deems reasonable and appropriate which are not inconsistent with the purposes of this part.

(h) To make or have made all surveys and plans necessary to the carrying out of the purposes of this part; to contract with any person, public or private, in making and carrying out such plans; and to adopt or approve, modify, and amend such plans, which plans may include, but are not limited to:

1. Plans for carrying out a program of voluntary or compulsory repair and rehabilitation of buildings and improvements.
2. Plans for the enforcement of state and local laws, codes, and regulations relating to the use of land and the use and occupancy of buildings and improvements and to the compulsory repair, rehabilitation, demolition, or removal of buildings and improvements.
3. Appraisals, title searches, surveys, studies, and other plans and work necessary to prepare for the undertaking of community redevelopment and related activities.

(i) To develop, test, and report methods and techniques, and carry out demonstrations and other activities, for the prevention and the elimination of slums and urban blight and developing and demonstrating new or improved means of providing housing for families and persons of low income.

(j) To apply for, accept, and utilize grants of funds from the Federal Government for such purposes.

(k) To prepare plans for and assist in the relocation of persons (including individuals, families, business concerns, nonprofit organizations, and others) displaced from a community redevelopment area and to make relocation payments to or with respect to such persons for moving expenses and losses of property for which reimbursement or compensation is not otherwise made, including the making of such payments financed by the Federal Government.

(l) To appropriate such funds and make such expenditures as are necessary to carry out the purposes of this part; to zone or rezone any part of the county or municipality or make exceptions from building regulations; and to enter into agreements with a housing authority, which agreements may extend over any period, notwithstanding any provision or rule of law to the contrary, respecting action to be taken by such county or municipality pursuant to any of the powers granted by this part.

(m) To close, vacate, plan, or replan streets, roads, sidewalks, ways, or other places and to plan or replan any part of the county or municipality.

(n) To organize, coordinate, and direct the administration of the provisions of this part, as they may apply to such county or municipality, in order that the objective of remedying slum and blighted areas and preventing the causes thereof within such county or municipality may be most effectively promoted and achieved and to establish such new office or offices of the county or municipality or to reorganize existing offices in order to carry out such purpose most effectively.

(o) To develop and implement community policing innovations.

(3) The following projects may not be paid for or financed by increment revenues:

(a) Construction or expansion of administrative buildings for public bodies or police and fire buildings, unless each taxing authority agrees to such method of financing for the construction or expansion, or unless the construction or expansion is contemplated as part of a community policing innovation.

(b) Installation, construction, reconstruction, repair, or alteration of any publicly owned capital improvements or projects if such projects or improvements were scheduled to be installed, constructed, reconstructed, repaired, or altered within 3 years of the approval of the community redevelopment plan by the governing body pursuant to a previously approved public capital improvement or project schedule or plan of the governing body which approved the community redevelopment plan unless and until such projects or improvements have been removed from such schedule or plan of the governing body and 3 years have elapsed since such removal or such projects or improvements were identified in such schedule or plan to be funded, in whole or in part, with funds on deposit within the community redevelopment trust fund.

(c) General government operating expenses unrelated to the planning and carrying out of a community redevelopment plan.

(4) With the approval of the governing body, a community redevelopment agency may:

(a) Prior to approval of a community redevelopment plan or approval of any modifications of the plan, acquire real property in a community redevelopment area by purchase, lease, option, gift, grant, bequest, devise, or other voluntary method of acquisition; demolish and remove any structures on the property; and pay all costs related to the acquisition, demolition, or removal, including any administrative or relocation expenses.

(b) Assume the responsibility to bear any loss that may arise as the result of the exercise of authority under this subsection, in the event that the real property is not made part of the community redevelopment area.

APPENDIX 2: LEGAL DESCRIPTION OF BOUNDARIES

East Tampa Boundaries

"That Part of Sections 1, 12 and 13, Township 29 South, Range 18 East, AND Sections 31, 32 and 33, Township 28 South, Range 19 East AND Sections 4, 5, 6, 7, 8, 9, 10, 16, 17 and 18, Township 29 South, Range 19 East AND Section 36, Township 28 South, Range 18 East, all lying within the City of Tampa, Hillsborough County, Florida, lying within the following described boundaries to wit: Beginning at the intersection of the centerline of Hillsborough Avenue (State Road 600) and the centerline of 50th Street, said intersection also being a point on the Easterly boundary of the corporate limits of the City of Tampa, as established by House Bill 734, approved by the Governor of Florida on, April 28, 1953, filed in the office of the Secretary of the State on, April 29, 1953; thence Southerly along said Easterly boundary of the corporate limits of the City of Tampa, to its intersection with the centerline of Dr. Martin Luther King, Jr. Boulevard (State Road 574); thence Easterly along said centerline of Dr. Martin Luther King, Jr. Boulevard and corporate limits of the City of Tampa, to its intersection with the centerline of 56th Street; thence Southerly along said centerline of 56th Street and corporate limits of the City of Tampa, to its intersection with the centerline of Interstate Highway 4 (State Road 400); thence Southwesterly and Westerly along said centerline of Interstate Highway 4, to its intersection with the centerline of Interstate Highway 275 (State Road 93); thence Northerly along said centerline of Interstate Highway 275, to its intersection with the Westerly projection of the centerline of Mohawk Avenue; thence Easterly along said Westerly projection and centerline of Mohawk Avenue, to its intersection with the centerline of Nebraska Avenue; thence Southerly along said centerline of Nebraska Avenue, to its intersection with the Westerly projection of the Northerly boundary of the Southerly 34.00 feet of the Westerly 150.00 feet of Lot 5, Block 2 of PRESTON'S SUBDIVISION, as recorded in Plat Book 2, Page 80, of the public records of Hillsborough County, Florida; thence Easterly along said Westerly projection and Northerly boundary of the Southerly 34.00 feet, to its intersection with the Westerly boundary of the Easterly 130.00 feet of said Lot 5; thence Northerly along said Westerly boundary, a distance of 50.00 feet, to its intersection with the Northerly boundary of the Easterly 130.00 feet of the Southerly 84.00 feet of said Lot 5; thence Easterly along said Northerly boundary of the Southerly 84.00 feet, and its Easterly projection, to its intersection with the centerline of 9th Street; thence Southerly along said centerline of 9th Street, to its intersection with the centerline of Mohawk Avenue; thence Easterly along said centerline of Mohawk Avenue, to its intersection with the centerline of 15th Street; thence Northerly along said centerline of 15th Street, to its intersection with the centerline of Comanche Avenue; thence Easterly along said centerline of Comanche Avenue, to its intersection with the centerline of 22nd Street; thence Northerly along said centerline of 22nd Street, to its intersection with the centerline of Henry Avenue; thence Easterly along said centerline of Henry Avenue, to its intersection with the centerline of 30th Street; thence Southerly along said centerline of 30th Street, to its intersection with centerline of Comanche Avenue; thence Easterly along said centerline of Comanche Avenue, to its intersection with the centerline of 34th Street; thence Northerly along said centerline of 34th Street, to its intersection with the

centerline of Comanche Avenue; thence Easterly along said centerline of Comanche Avenue, to its intersection with the centerline of 37th Street; thence Northerly along said centerline of 37th Street, to its intersection with the centerline of Deleuil Avenue; thence Easterly along said centerline of Deleuil Avenue, to its intersection with the Westerly boundary of the Southerly 291.00 feet of the Northerly 700.00 feet of the Easterly 500.00 feet of the Southeast $\frac{1}{4}$ of the Southwest $\frac{1}{4}$ of said Section 33, Township 28 South, Range 19 East; thence Northerly along said Westerly boundary, to its intersection with the Westerly projection of the Southerly boundary of, Lot 8 of POWHATAN HILLS, a subdivision of record as recorded in Plat Book 40, Page 98, of the public records of Hillsborough County, Florida; thence Easterly along said Westerly projection and Southerly boundary of Lot 8, to and along the Southerly boundary of Lots 7, 6, 5, 4, 3, 2 and 1 of said POWHATAN HILLS, and its Easterly projection, to its intersection with the centerline of 43rd Street; thence Southerly along said centerline of 43rd Street, to its intersection with the centerline of Deleuil Avenue; thence Easterly along said centerline of Deleuil Avenue, to its intersection with the Easterly boundary of NORTHVIEW TERRACE SUB., a subdivision as recorded in Plat Book 41, Page 12, of the public records of Hillsborough County, Florida, said intersection also being, the Northerly projection of the Westerly boundary of Lot 19, of said NORTHVIEW TERRACE SUB.; thence Southerly along said Northerly projection and Easterly boundary, to and along the Easterly boundary of said Lot 19, to the Southeast corner of said Lot 19, said Southeast corner, also being a point on the Northerly boundary of the following described parcel: Beginning at the intersection of the Lot 60 of PLAT OF FUNK'S HOME PARK SUBDIVISION, as recorded in Plat Book 19, Page 9 of the public records of Hillsborough County, Florida, and the North Right of Way line of Hillsborough Avenue, said point lying 17.00 feet North of the Southwest corner of said Lot 60, thence Northerly along Easterly boundary of vacated alley abutting on the East of Block 2 of REVISED MAP OF RUBENSTEINS SUBDIVISION, as recorded in Plat Book 8, Page 38 of the public records of Hillsborough County, Florida, and the Northerly projection of said boundary, a distance of 532.70 feet, to a point lying 66.00 feet, more or less, Southerly of the Northerly boundary of the Southwest $\frac{1}{4}$ of the Southwest $\frac{1}{4}$ of the Southeast $\frac{1}{4}$ of said Section 33, Township 28 South, Range 19 East, thence Westerly 632.00 feet, thence Southerly to the North Right of Way line of Hillsborough Avenue, thence Easterly 632.00 feet, to the Point of Beginning, of said parcel; thence Easterly along said Northerly boundary, of the above described parcel, to a point on the Westerly boundary of Lot 50 of said, PLAT OF FUNK'S HOME PARK SUBDIVISION; thence Northerly along said Westerly boundary of Lot 50, to and along the Westerly boundary of Lot 49, of said PLAT OF FUNK'S HOME PARK SUBDIVISION, to the Northwest corner of said Lot 49, said Northwest corner, also being a point on the Northerly boundary of said PLAT OF FUNK'S HOME PARK SUBDIVISION; thence Easterly along said Northerly boundary of PLAT OF FUNK'S HOME PARK SUBDIVISION, and its Easterly projection, across the street Right of Way of 47th Street, to and along the Northerly boundary of the South $\frac{1}{2}$ of the Southeast $\frac{1}{4}$ of the Southeast $\frac{1}{4}$ of said Section 33, Township 28 South, Range 19 East, to its intersection with said Easterly boundary of the corporate limits of the City of Tampa, said intersection also being a point on the centerline of said 50th Street; thence Southerly along said Easterly boundary of the corporate limits of the City of Tampa and centerline of 50th street, to its intersection with the centerline of Hillsborough Avenue (State Road 400), said intersection being the Point of Beginning."

APPENDIX 3

COMMUNITY NEEDS ASSESSMENT

A RESIDENT DRIVEN NEEDS ASSESSMENT FOR THE EAST TAMPA COMMUNITY: REPORT



A RESIDENT DRIVEN NEEDS ASSESSMENT FOR THE EAST TAMPA COMMUNITY

Conducted by:

The Health, Education, and Social Services Committee (HESS)
Maxine Woodside, Chairperson of HESS

The East Tampa Community Revitalization Partnership (ETCRP)
Evangeline “Vann” Best, Chairperson

Corporation to Development Communities of Tampa, Inc. (CDC)
Toni Watts, President/CEO

Funding Sources

East Tampa Community Revitalization Partnership (ETCRP)

Children’s Board of Hillsborough County

NeighborWorks America

Partners

USF Health, Central Hillsborough Healthy Start Project

ET NOW, CDC of Tampa, Inc.

The University of South Florida

- College of Education
- Louis de la Parte Florida Mental Health Institute

34th Street Church of God

Corner Stone Ministries

The Miller Group

A RESIDENT DRIVEN NEEDS ASSESSMENT FOR THE EAST TAMPA COMMUNITY

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EXECUTIVE SUMMARY

The purpose of this Resident Driven Needs Assessment was to provide the East Tampa Community and the City of Tampa with pertinent data to improve the health, educational and social services in East Tampa. The goal is to enhance the coordination of health, educational, social services and continued economic revitalization within the community (a system of care and resources) in order to increase the financial/educational success of all residents.

This was a resident-driven project proposed by the Health Education and Social Services (HESS) committee of the East Tampa Community Revitalization Partnership (ETCRP) and the Corporation to Develop Communities (CDC) of Tampa Inc., to conduct a needs assessment in East Tampa. The CDC of Tampa was the fiscal agent providing administrative supports. The management and coordination of project activities was a collaborative effort of the CDC and the HESS subcommittee. Only residents of East Tampa were hired as coordinator/trainers and East Tampa residents to interview other residents. A total of 923 individuals in the various communities within the East Tampa community were interviewed; 823 were administered a standard questionnaire and 100 participated in focus groups. The questionnaire was administered and focus groups were held to answer two questions: 'What are the current demographics of the East Tampa Community?' and 'What does the community need?' The results indicated that the majority of the questionnaire respondents were African Americans (73.1%) and majority female (53%). There is a wide and diverse age group living in the households in the East Tampa community; the majority of questionnaire respondents were between the ages of 40-69, whereas the majority of the residents in the respondents' households were between the ages of 1 to 20 years of age. In regards to income, the majority (44.5%) of the respondents earned \$30,000 or less and the majority had a high school diploma or less education. However, the majority of the respondents (50.6%) lived in and owned a single family home. When questioned about their familiarity and use of social services agencies/organizations, the respondents were not familiar with over half of the agencies in the community. The least familiar and used service was the Community Health Advocacy Partnership, Inc. (CHAP) and organizations in the East Tampa community while the most familiar and frequently used social agency was the Lee Davis Neighborhood Service Center Medical facility.

Of the services used at the social service agencies/organizations, health, substance abuse prevention and social services (Women, Infants and Children Program—WIC, Section 8) were the most frequently used type of services as reported by the respondents. The questionnaire respondents were also asked to rate the types of services and businesses that they felt were needed to improve the quality of the community. Affordable housing was the top type of service identified as a need. And in regards to businesses, the respondents indicated that a supercenter such as Wal-Mart or Target was needed in the community. The themes that emerged from the comments respondents wrote on the questionnaires as well as focus group themes corroborated the findings of the questionnaire.

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INTRODUCTION OVERVIEW

Purpose and Goals

Purpose

The purpose of this project was to collect resident driven needs assessment data, analyze this data, and use this data to inform decision-making pertinent to social services, education and economical infrastructure in East Tampa. The goal is to enhance the coordination of health, educational, social services and continued economic revitalization within the community (a system of care and resources) in order to increase the financial/educational success of all residents. Particularly children/youth and the quality of life of residents across the full life span (infants through elderly citizens) will benefit through the information gathered through this effort

The needs assessment is an update of the prior needs assessment, designed to determine residents' awareness, perception of effectiveness of existing social services in the community and to identify residents' perceptions of needs for other social services and businesses in the community, along with basic demographic characteristics. This needs assessment will provide East Tampa residents an opportunity to give their ideas about how they would like to see things done, created and improved in East Tampa and, to provide the community and City with background information about the current demographics in East Tampa and how to allocate funding to best meet the needs of residents of the area.

This Needs Assessment was conducted to learn from residents how they would like to see things done in East Tampa, what improvements they would like to see in East Tampa, and what they would like created in East Tampa. Twelve years ago a survey was conducted by the CDC of Tampa, Inc. Many of the services that residents then said East Tampa needed in the area were developed. There is now another opportunity to provide input to the East Tampa community and to the City of Tampa's CRA. The input from the Needs Assessment will help shape the development of East Tampa and its future.

Project Goals

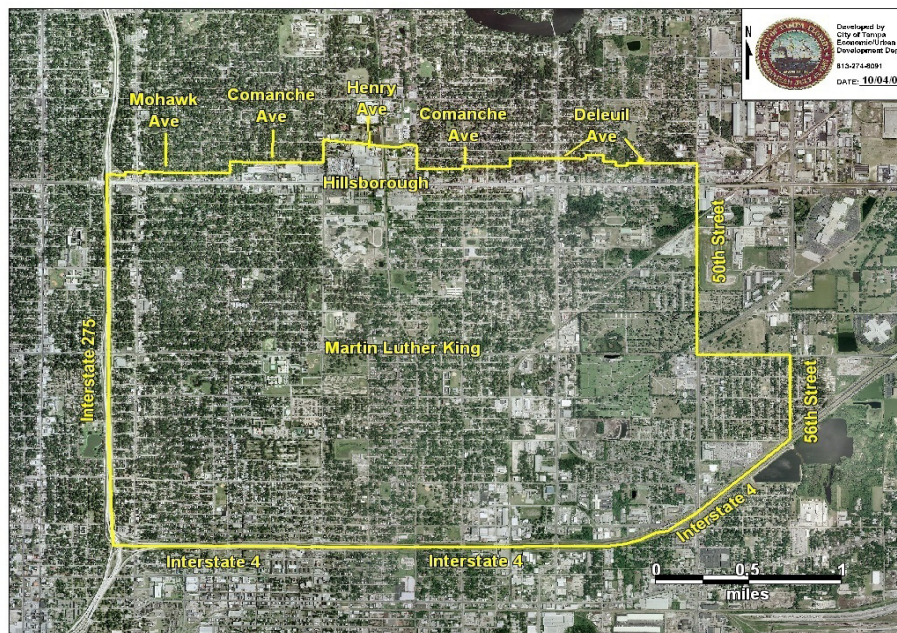
- Provide administrative and management capacity to implement resident needs assessment activities.
- Gather data from a resident-driven needs assessment to inform decision-making pertinent to health, education, economic and social services infrastructure in East Tampa.
- Data analysis of pertinent health, education, social services and financial information in East Tampa.
- Provide written and oral reports that may subsequently be used to inform decision-making pertinent to health, education, economic and social services infrastructure in East Tampa.

Overview East Tampa Community Revitalization Partnership (ETCRP): Boundaries and Maps

East Tampa has been designated by city and county government as a Community Redevelopment Area (CRA), a designation determined by factors of slum and or blight, as defined by Chapter 173, Part III, Florida Statutes.

The CRA designation enables the allocation of Tax Incentive Fund (TIF) monies, which are funds accrued as the difference between the property tax base when an area is identified as a CRA and the current property tax value over a 30-year period.

The East Tampa area is located within the county of Hillsborough, Florida with physical boundaries of Interstate 275 to the west, Hillsborough Ave to the north, 50th Street to the east and Interstate 4 to the south (see Figure 1). There are three primary zip codes in the East Tampa area—33603, 33605 and 33610. There are three zip codes that border the East Tampa area—33602, 33604, and 33619. East Tampa has the following neighborhoods/organizations: Old Seminole Heights, Northeast Association, Live Oaks Square Association, Highland Pines Association, Grant Park Association, Florence Villa Association, East Business Association, WM Ybor Association, Northview Hills Association, Southeast Seminole Heights, Palmetto Association, and College Hill Association. Census track data were developed to be used to select participants randomly while ensuring that participants include residents of each neighborhood in the designated areas.



Need Statement

The intent, within the context of East Tampa, is to improve infrastructure; understand the community demographic make-up; uncover the economic opportunities for redevelopment; study the migration workforce, goods and services currently provided or lacking within the community. Through this, the goal is to improve the delivery and access to services and opportunities for children, their families and the community at large. This information will assist in targeting needs to specific locations and resources that will stimulate private investment and services delivery within the District. The goal is to promote re-generation of the existing tax base form increased TIF availability for expenditure directed to the needs identified from the study. This needs assessment addresses the 10-12 neighborhoods within East Tampa, a designated Community Redevelopment Area.

CDC of Tampa, with support from Children's Board, conducted a needs assessment over 12 years ago, which was limited to the College Hill, Ponce de Leon, and Belmont/Jackson Heights neighborhoods. The results of that needs assessment were used to develop a range program and services and economic development projects that increase the quality of life for residents of East Tampa through job creation, affordable housing, and youth programs. The identification of East Tampa as a CRA creates an opportunity to revisit the assets and needs of the community,

and to provide input to the East Tampa community (via the East Tampa Community Revitalization Partnership, ETCRP) and to the City of Tampa Mayor's Neighborhood redevelopment staff. Budget cuts since the last survey have resulted in many services being dropped or drastically diminished. The Existing Conditions Report (2004), based upon data gathering by the City of Tampa to support the request for Community Redevelopment Area (CRA) status for East Tampa described conditions of slum and blight primarily relating to physical structures in the area. Florida statute specifically excludes consideration of human and social capital in the funding of CRAs. At the same time, community development impacts human capital and the development of human and social capital impacts the success of community development initiatives.

Health Education & Social Services committee (HESS) of the East Tampa Community Revitalization Partnership (ETCRP)

The Mission of HESS, consistent with the mission of ETCRP for sustainable community revitalization and self-sufficiency in East Tampa, is to enhance the educational success and attainment of children/youth and to enhance the quality of life of residents across the full life-span (conception through elderly citizens). Such enhancements require the coordination of educational, social and health services within the community, and the implementation of strategies to maximize the benefits of community development while minimizing the negative impacts of community development on residents and services.

Guiding Principles for HESS

- Involve residents and stakeholders in taking responsibility for our own community.
- Focus on education, social and health services that relate to the full life-span (conception through elderly).
- Address concerns of families in the broadest sense, recognizing that caregivers come in many forms – biological, foster, adoptive, grandparents, extended biological families, neighbors, and friends/partners.
- Use existing resources effectively and creatively.
- Coordination of services, while increasing efficiency, is designed to enhance the quality of services for residents.
- Assessing social impact of community development initiatives is critical to successfully maximizing the benefits and minimizing or eliminating negative outcomes of community development.

This needs assessment, along with related data, the resulting report, and subsequent action plans, is an important part of fulfilling the mission. The HESS committee consists of East Tampa residents, representatives from community agencies, businesses, and schools and partners from USF.

Resident Driven

It was important for this needs assessment that active community resident participation be crucial for this project to accurately reflect the real interests, concerns, and needs of the community. This resident driven approach involved East Tampa community members having primary responsibility for the central decision-making role in prioritizing survey instrument, selecting the behaviors to be addressed in designing the methodology, and in developing the most effective ways to disseminate results. Community participation and control are central principles that guide research

planning, implementation, and data collection activities. It was important to the HESS committee that the needs assessment was led by residents and not be led by the City of Tampa and/or governmental agencies.

This was a resident-driven project proposed by the Health Education and Social Services (HESS) committee of the East Tampa Community Revitalization Partnership and the CDC of Tampa, to conduct a community-driven needs assessment in East Tampa. Only residents of East Tampa were responsible for conducting the needs assessment and hiring East Tampa residents to interview other residents. The CDC of Tampa was the subcontractor for this project, with Toni Watts as Chief Executive Officer, as fiscal agent providing administrative supports. The management and coordination of project activities was a collaborative effort of the CDC and the Health, Education and Social Service Committee, a subcommittee of the ETCRP. Member of HESS were responsible for leading this Needs Assessment in East Tampa.

Since 2003, a collaborative effort has been sustained, involving the USF Collaborative and its Neighborhoods and Communities Working Group, numerous projects supported by the USF Collaborative (both small grants and service learning/action research classes/ projects), and partnering/ collaborating/providing technical assistance. A wide variety of other projects have been conducted in East Tampa with the support of the USF Collaborative, and, as members of the Collaborative. Action research in East Tampa focusing on assets in the health, educational, and social services arenas has found that some residents are not aware of some existing services; express concerns about the quality of some services, express the need for additional services and or express the need for coordination of services. USF faculty (R. Briscoe and H. Keller) and students provided technical assistance and support for the development of the measures, training of interviewers and focus group leaders, ongoing project activities, report writing, recommendations and provided technical assistance in relation to the resulting action plans.

The Miller Group

- Sharon Miller
- Sylvia Carley

The senior partners were residents of the East Tampa community for over 20 years. Partners and staff attended schools or worked in educational institutions that are housed in the East Tampa area. Senior partners have advanced degrees in School Psychology, Sociology and Research and Methods. All have consistently been involved in community development and advocacy.

Funding

Funding for the project came from the City of Tampa Tax Increment Financing (TIF), Children's Board of Hillsborough County, Neighborworks America and in-kind contributions.

Data Collection Methodology: Survey and Focus Groups

The Health Education and Social Services committee, with other community members were charged with the development of all phases of the project from the development of the instruments, outreach, the action plan for conducting the needs assessment, analysis, report writing and recommendations. This committee conducted all decision-making, action plans and subsequent implementation, documentation and tracked over time.

The survey and focus group methodologies represented an attempt to address perceptions of awareness, use, and effectiveness of existing services, and perceived need for new services. In order to make the survey manageable for the community, residents participated in the process of developing, revising, and reducing its length and depth. Once the survey was developed focus group questions were developed to use as means to obtain more in-depth information. The surveys alone cannot get at the critical question of coordination of services.

The survey instrument was planned to administer to a total of 1000 residents via face-to-face interviews and focus groups by paired residents and USF students. An intensive outreach and marketing effort was planned and directed to media and to faith and community organizations in targeted neighborhoods and zip codes. The specific East Tampa neighborhood organizations were contacted and sampled. Census tract data were developed to be used to select participants randomly while ensuring that participants include residents of each neighborhood in the designated East Tampa area.

Needs Assessment: Preparation

Development of Needs Assessment Survey/Interview Instrument

1. Development of purpose & scope of needs assessment with HESS committee, including member partners & Residents
2. Development of items via multiple meetings with HESS committee and community residents
3. Piloted interview schedules with residents
4. Revised items and interview schedule
5. Revised items and interview schedule with input from URS and City of Tampa
6. Revised format with HESS committee and residents

Development of Training Manual for Interviews and Focus Groups

1. Reviewed prior training manuals
2. Adapted and developed training manual to specific interview schedule
3. Piloted training with residents
4. Revised training manual

Developed Grid for survey sample across all neighborhoods within East Tampa, and documentation format

1. Developed survey sample grid to ensure interview/focus group participants from all neighborhoods
2. Developed documentation forms and procedures to ensure accurate records of interviews/focus group participants, accuracy/completion of data entries, and delivery of monies for successful completion of training, and successful completion of interviews/focus groups

Development of marketing materials

1. Developed drafts for media coverage, flyers to recruit interviewers and participants, & information for service agencies

Recruitment efforts

1. Community members attended community events, presented tentative information about upcoming needs assessment, and recruited names and contact information of people interested in becoming interviewers and or participating as interviewees or in focus groups
2. Ads were drafted for coordinators, support staff, interviewers and advertised locally in the Florida Sentinel Bulletin and placed in location throughout East Tampa

Hired

1. Four Project Coordinators
2. Twenty-eight East Resident interviewers

These Project Coordinators were responsible for recruiting, screening, hiring and training interviews of focus groups facilities. The coordinator documented successful completion of interviews/focus groups, and maintained records and completed survey forms

Needs Assessment: Data Collection

- **Orientation**-Applicants were notified to attend orientation at the Thirty-Fourth Street Church of God on January 12, 2008. Twenty-eight East Tampa residents completed the orientation that was facilitated by Drs. Richard Briscoe, Harold Keller and Maxine Woodside. Johnetta Goldsmith and William Wheeler, Program Coordinators, assisted with the orientation, are East Tampa residents.
- **Training**-Training was conducted January 22 and 24 at the Thirty-Fourth Street Church of God. Twenty-three East Tampa residents completed the training and are eligible to work as interviewers for the needs assessment. The training was facilitated by Program Coordinators Terry Tinsley, and Johnetta Goldsmith, William Wheeler and Sharon Niblack assisted.
- **Focus Group #1**-The first focus groups were held on January 19, 2008 at various community agencies. East Tampa residents, neighborhood associations, and community agencies were contacted as part of the recruitment process by the program coordinators and asked to participate in the focus groups. Residents were given the opportunity to attend at The Heart of East Tampa Front Porch office, Corporation to Develop Communities of Tampa, Inc. (CDC), 34th Street Church of God, Belmont Heights Estates and Community Health Advocacy Partnership (CHAP). Forty-seven out

of the fifty-one registered participated. The age range for this group was middle age and senior citizens. These focus groups were facilitated by Drs. Briscoe, Keller and Woodside, Program Coordinators Terry Tinsley, Sharon Niblack, William Wheeler, Johnetta Goldsmith, Ronald Bradford and Toni Watts.

- **Focus Group #2**-The demographics for this group was African American East Tampa males, who are in the prison reform system. Their age range is middle thirty to fifty-five. The focus group, which was held at Abe Brown Prison Ministries on March 13, 2008, consisted of nine participants who live reside in two different group homes. One male was not a part of the prison ministry program. The facilitator was program coordinator, Sharon Niblack and two of her interviewers, Adolphus McMillian and Rhonda Lewis.
- **Focus Group #3**-The demographics was a diverse group of Hillsborough Community College GED students that reside in East Tampa, whose age ranges from 18-25. There were seven participants, and Johnetta Goldsmith and William Wheeler were the facilitators for this March 18, 2008 focus group. Two USF students, Alex Parrow and Michelle Raxter assisted.
- **Focus Group #4**-The demographics for this March 25, 2008 focus group was African American East Tampa males and females attending The Sylvia Kimball Center's GED class. Their age range was 18-25. Two of the instructor also participated for a total of 14. Facilitators for this group were program coordinators Johnetta Goldsmith and William Wheeler, who were assisted by two USF students, Alex Parrow and Brett Mervis.
- **Strategic Planning**-The four program coordinators met on January 31, 2008 at The Heart of East Tampa Front Porch Council, Inc., to plan the assignments for the interviewers. Tampa Police Department grid map and zip code boundaries were used to divide twelve communities into four groups, one per coordinator. Nineteen grids were divided that allowed each team to be responsible for approximately 199 to 202 residents that would be selected randomly by the interviewers. Only two homes per street would be visited in order to include all targeted areas. The interviews began February 1 and ended April 4. A total of 923 residents were interviewed. Other sites where interviews were conducted for no more than two days were the CDC of Tampa's Stepping Stones class and First Baptist Church of College Hill feed the homeless program.
- **Fiscal Agent**-The fiscal agent for the program was the Corporation to Develop Communities of Tampa, Inc. Ronald Bradford, Contracts Manager, received invoices from program coordinators and issued checks on a bi-weekly basis. Distribution of funds for interviewee payments were also issued by Mr. Bradford. Johnetta Goldsmith was the lead person, with the assistance of William Wheeler in this process.
- **Wrap-up**- A chat n'chew awards recognition was held April 17 for the final 12 team members at the Front Porch Office. A post evaluation was distributed. All responses were favorable. All surveys were delivered to Dr. Sharon Miller on April 24 for data analysis

NEEDS ASSESSMENT FINDINGS: THE MILLER GROUP

Survey Respondents

Survey Respondents

From the various zip codes and communities, community workers surveyed 990 residents using a standard questionnaire (n=862) and via six focus groups (n=128). Approximately 568 (66%) of the 862 respondents provided zip code information (see Table 1). Additionally, within the various zip codes, the communities were broken up into grids. Table 2 gives a pictorial representation of the number of surveys (N=862) elicited from the residents in the various neighborhood grids located within the respective zip codes. The community workers who administered the surveys also resided within the various zip codes and communities. A copy of the survey is in Appendix A. It should be noted that some of the respondents did not answer all of the questions on the survey. Consequently, some factors assessed by the questionnaire are uneven in their representations and the total percentages will not equal 100.

Table 1. Number of Respondents by Zip Codes (N=568)

Zip Codes	Number of Respondents
33603	1
33605	110
33608	2
33610	455

There are several communities, civic and business associations located within the East Tampa area: College Hill Civic Association, East Tampa Business and Civic Association, Inc., Belmont Heights Estates, Florence Villa/Beasley/Oak Park Civic Association, Front Porch Florida Community, Grant Park Civic Association, Highland Pines Community Taskforce, Inc., Northeast Community Crime Watch and Civic Association, Inc., Northview Hills Civic Association, Inc., Old Seminole Heights Neighborhood Association, Inc., Southeast Seminole Heights Civic Association, Inc., and VM Ybor Neighborhood Association and Crime Watch.

Table 2. Neighborhoods Grids and Number of Surveys Elicited (N=862)

Neighborhoods	Grids	Number of Surveys
College Hill (Belmont Heights)	98	65
East Tampa Business & Civic	72, 23, 74, 82, 84, 85, 86, 97, & 98	331
Front Porch Florida Community & Florence Villa/Beasley/Oak Park	108, 109, 110	40
Grant	101	5
Highland Pines	100	4
Northeast Crime and Civic & Northview Hills Civic	75 & 78	14
Old Seminole Heights & Southeast Seminole	70, 71, & 83	103
VM Ybor Neighborhood Association	95, 96, & 107	83
Other Community Sites*		219

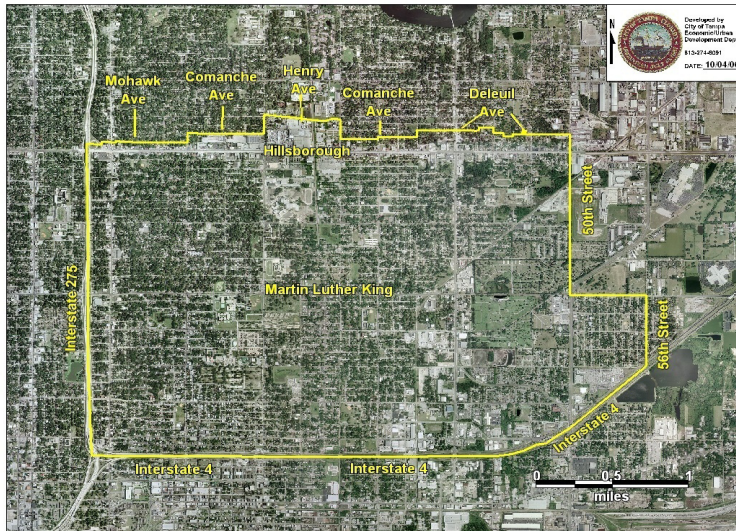
*Note. Other Community Sites include: CDC of Tampa, Mohawk north of Hillsborough, Comanche north of Hillsborough, and Live Oak Association.

Moreover, the questionnaire was administered and focus groups were held to answer the following two questions:

- ‘What are the current demographics of the East Tampa Community?’ and
- ‘What does the community need?’

Based on an analysis of the questionnaire and the focus group materials, a demographic picture of the surveyed respondents and some descriptive aspects of their households are presented. To better understand the respondents' relationship to and interaction with the social service agencies and organizations within the community, the familiarity and use of the current agencies/organizations in the neighborhood are examined. Finally, based on the data from the questionnaires, personal comments and the focus groups, the perceived services and business needs are shared.

Figure 1. Map of East Tampa Community



Demographics

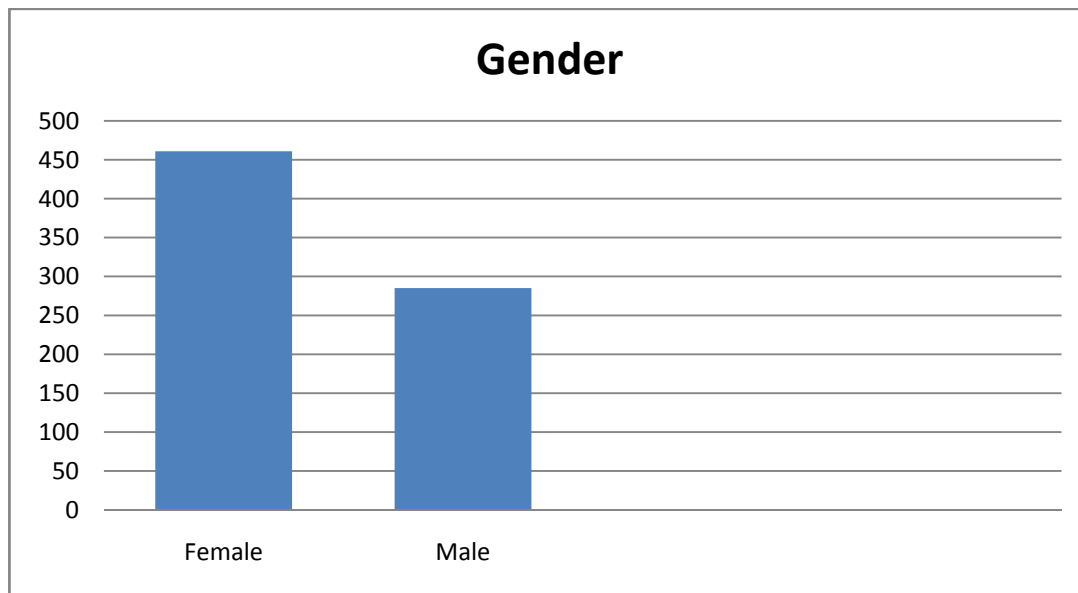
The respondents were asked to provide the following basic demographic information:

- Gender
- Race/Ethnicity
- Age
 - o Respondents
 - o People in Household
- Socio-economic Status/Income
- Education Levels
- Transportation
- Homeownership
- Marital Status

Gender

Of the 862 responding to the questionnaire, the majority were female (53.5%; n=461) while 33.1% (n=285) were males. Figure 2 provides a pictorial representation of the gender demographic. These data proportionately mirror the US Census Bureau (2000) statistics for these communities (33603, 33605 and 33610). That is, as reported by the US Census Bureau, the majority of the residents are female (52%) and a male population of 48%.

Figure 2. Gender of Questionnaire Respondents

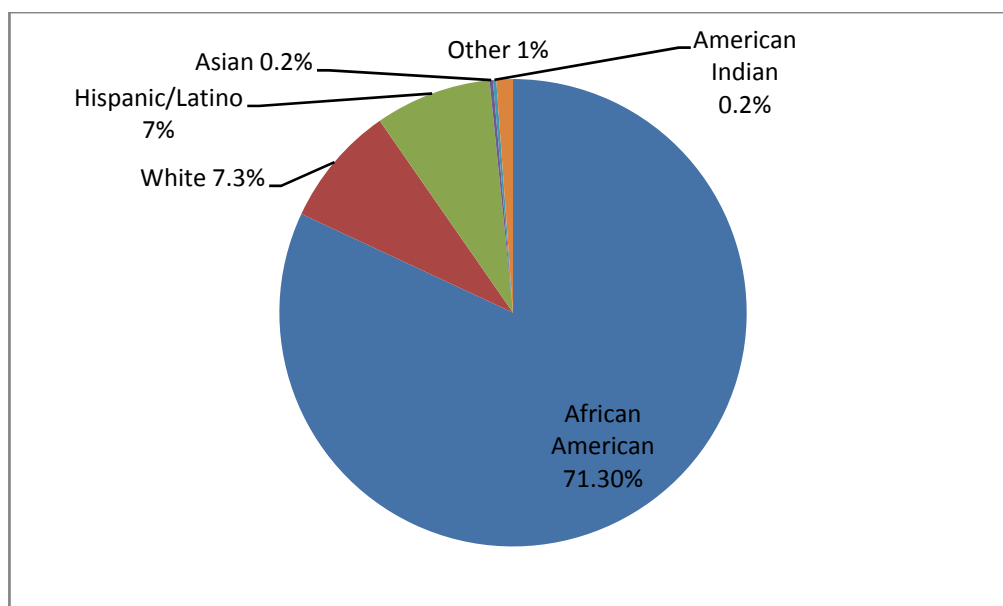


Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Race/Ethnicity

The respondents to the questionnaire are predominately African American. Figure 3 provides a breakdown of all respondents participating in the survey by race/ethnicity. As described in this assessment analysis, the race and ethnicity data appears to be proportionately reflective of the 2000 Census demographics wherein the majority of the residents in the East Tampa area were African American. For example, average percentages for race as presented in the Census Data for the zip codes were: African American – 55%; White – 37%; American Indian or Alaska Native – .4%; Asian – .5%; and Some Other Race – 4.2%. It should be noted that the primary language of the residents of East Tamps is English.

Figure 3. Race/Ethnicity of in the East Tampa Area



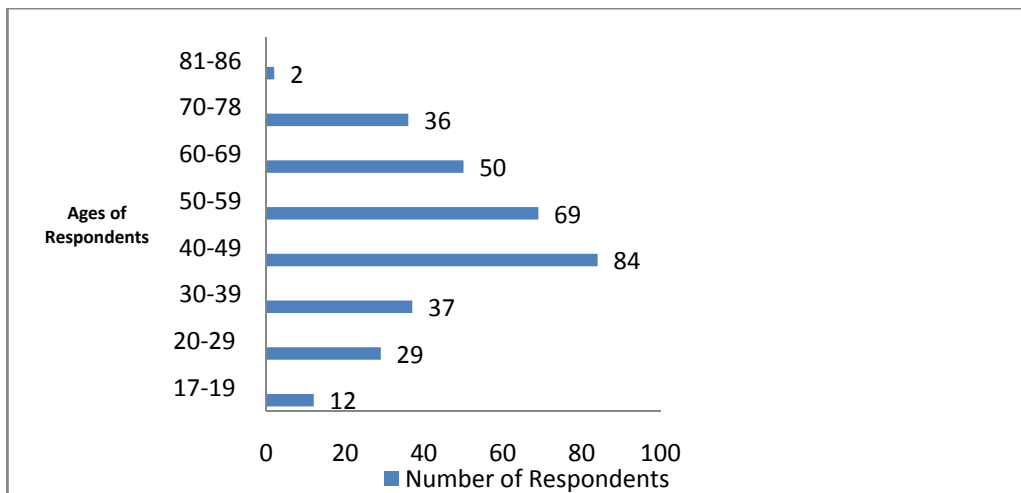
Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

In the survey, the age the survey respondents and age of the members of the household were two different data points (variables assessed).

Survey Respondents

The age range for the individuals responding to the survey ranged from age 17 to 86. More specifically, 64% of the respondents who reported this demographic information were between the ages of 40-69. See Figure 4 for additional information in regards to the ages of the survey respondents.

Figure 4. Ages of Questionnaire Respondents



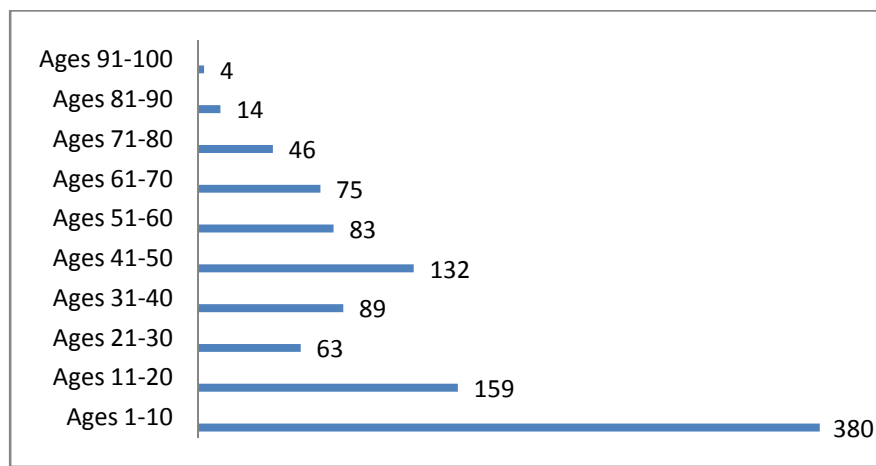
Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Ages of People in Household

Based on the survey results, there appears to be a wide range and a diverse age group living in households in the East Tampa area; the ages range from less than 1 years of age to 94 years of age. More specifically, the majority (51.6%; n=539) of the individuals living in the households were between the ages of 1 to 20 years of age; 31.9% (n=333) were preschool age and 14.3% (n=150) were school age. School age is defined as those individuals between the ages of 6 and 16, and fit into the category of compulsory school attendance. Additionally, the most frequently reported age was 1 year of age or less (n=98), with a medium age of 19 years for all individuals living in the household.

The Census Bureau data (2000) in comparison to the household data from the questionnaire share some similarities but there are differences as well. The Census data reflects a majority population 64 years and younger (average percentage – 79). See Figure 5 for additional information.

Figure 5. Ages of Individuals Living in Household



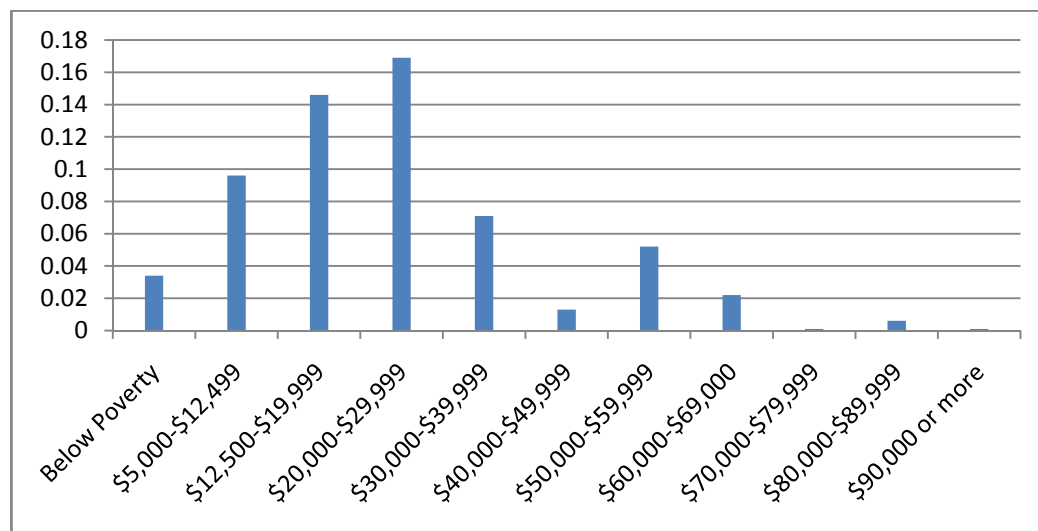
Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Socio-Economic Status

Income

When interviewed 528 or 61.4 per cent of the residents were able to provide the total household income. The total income for 2006 included work and all of the governmental assistance checks. The income level by a majority of the respondents is less \$30,000.

Figure 6. Total Household Income (2006)



Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Public Assistance

Residents were asked if they received any public assistance 461 or 53.5 indicated that they received some form of assistance. In fact, at least 15% receive some type of public assistance (see Table 3). No less than 10% (n=87) of the population received food stamps and 2.1% (n=18) is being served under the Temporary Assistance to Needy Families (TANF).

Table 3. Forms of Public Assistance

Form of Public Assistance	Any Public Assistance	TANF	Food Stamps	Other
Percentage	15.3	2.1	10.1	1.3

Current Employment

In regards to employment, 32.1% (n=277) were employed full-time as compared to 3.5% (n=30) that worked part-time. Most of the respondents were retired, disabled, or unemployed. In fact, 19% (n=164) were retired, 20% (n=172) disabled and 6.6% (n=57) was unemployed. At least (40%) of the respondents worked or attended school. More specifically, 2.7% (n=23) were full-time students while 2.6% (n=22) were in school and employed on a part-time basis.

Moreover, of the respondents gainfully employed and who provided information about their employment status, 3.4% (n=29) worked in a private office while 3.1% (n=27) worked in a school setting. In the category 'other' 8.8% (n=76) indicated that they worked in a setting other than the categories listed on the survey.

Educational Levels

The education levels range from less than high school to the advanced degree; 59% had a high school diploma or less (40% high school diploma or GED; 19% - less than a high school diploma) while 20.6% had some college or technical school training. The remaining 5.3% had a bachelor's to an advanced degree (1.6% - Associate Degree or equivalent; 3.8 – Bachelor's Degree; 1.5% Advanced Degree). See Table 1 for additional information.

Table 4. Educational Levels

Educational Level Completed	Percentage of Respondents
Less than High School	19%
High School Graduate (or GED)	40%
Some College or Technical School	20.6%
Associate's Degree or at least 2 yrs college	1.6%
Bachelor's Degree	3.8%
Advanced Degree	1.5%

Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Transportation

The questionnaire respondents were asked ‘how do you typically get to work/school?’ Based on the responses, the mode of transportation to work or school was primarily by personal car or bus.

Table 5. Mode of Transportation

Mode of Transportation	Walk	Bike	My Own Car	Bus/Van	Carpool	Other
Percentage	1.6	0.2	29.1	10.7	0.6	0.8

Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Homeownership vs. Renting

The data indicated a majority of the respondents live in single family homes and own their homes rather than rent (see Figure 7). Of the 739 respondents, 436 owned their own home and 303 were renters. Most of the renters were currently living in public housing or had previously lived in public housing. Furthermore, 486 (56.4%) have lived in their current location five years or less. On the average most homes have 1 or 2 people in the household.

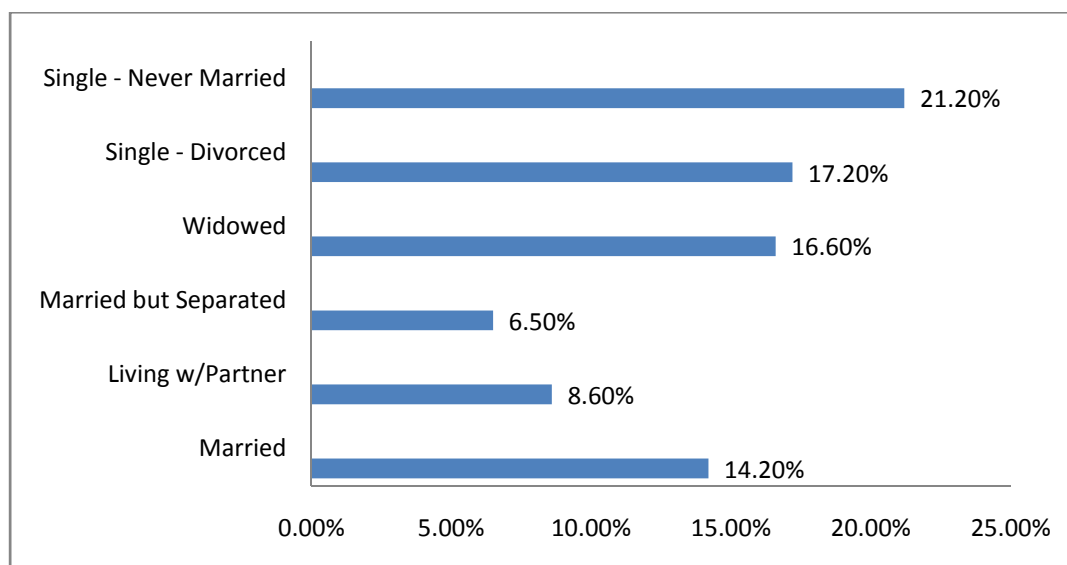
Figure 7. Homeownership

Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Marital Status

Most of the respondents are living in a single status situation. However, a majority (51.2%; n= 461) are married or have been married (i.e., single-divorce, widowed, married but separated, or married). See Figure 8.

Figure 8. Marital Status of Respondents

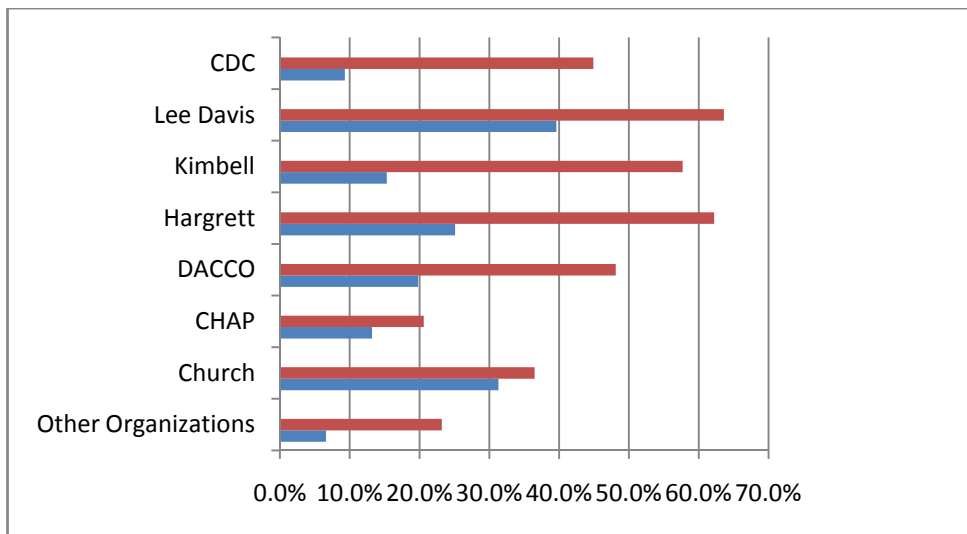


Note. Percentages do not add up to 100 because of missing data; not all respondents provided the requested information.

Respondents' Familiarity with and Use of Existing Community Services

Respondents were asked a series of questions to determine how familiar they were with the services in the East Tampa community, which services did they use, and which of the services were helpful. Figure 9 provides a pictorial view of the respondents' familiarity with and use of existing services within the East Tampa Community. Additionally, immediately following with pictorial representation, an expanded discussion of this section is provided and includes a description of the community agencies/organizations in the East Tampa Community, the frequency of the respondents' familiarity, usage and finally whether the respondents found the services helpful.

Figure 9. Familiarity and Use of Services



The Corporation to Develop Communities of Tampa, Inc (CDC of Tampa)

The CDC of Tampa is a 501c3 community development corporation focused on implementing neighborhood revitalization strategies in East Tampa. The CDC accomplishes its mission by providing programming in workforce development, youth leadership, small business development and affordable housing.

While 44.9% (n=387) of the 851 respondents were familiar with the CDC of Tampa, 89% (n=768) of the 848 had not used nor knew anyone who had used the services.

Respondents most frequently use the open air market and job placement services as noted in the written comments of the questionnaire. More respondents indicated that the services were more helpful than not.

Lee Davis Neighborhood Service Center

The Center provides a wide variety of services and activities that are structured to meet the varied needs of the community through programs offering assistance in the areas of housing employment, financial, medical services. The Center will also assist with deposits to have water, electric and gas utilities turned back on for qualified applicants.

Over 63% (n=548) of the 855 respondents were familiar with the Center while 59% (n=509) of the 850 respondents had used or knew someone who had used the services.

A summary of the comments about the center indicate medical services, payment of utility bills and WIC provisions were the most frequent services used by the respondents. Furthermore, the respondents indicated that the services were helpful. Although some residents felt that the service was too slow.

Kimball Full Service School of Hillsborough County

The Kimball Full Service School is operated by Hillsborough County School District. It is specifically designed to help improve student performance in areas of attendance, behavior, and academic achievement. The school provides a number of services such as the parent resource center, early childhood education, GED instruction, etc.

More than 57.7% (n=497) of the 855 respondents were familiar with the Kimball School, however only 15.3% (n=132) of the 850 respondents had used or knew someone who had used the service.

When commenting in regards to the services, most respondents discussed having utilized the Head Start and GED programs. Although not all respondents indicated that service was helpful, a few indicated that the service was 'good' or 'friendly.'

James Hargrett Building

The James T. Hargrett, Jr. Building was added to the Lee Davis Complex in Tampa as a new service center. The center function was to house a program designed to provide financial assistance and support services to relatives who were caring for children placed with them under chapter 39, F.S., as a result of a departmental determination of child abuse, neglect or abandonment and placement with the relative.

Over 60% (n=536) of the 854 respondents were familiar with the James Hargrett Building. However, only 25% (n=216) of the 850 respondents had used or knew someone who had used the services.

The most frequent service provided was the issuance of food stamps. The services were noted as very helpful and the respondents questioned when will the services return to the community. In fact, a number of respondents ask questions similar to this "The building has been closed for the last 12 months and left without notification, why did they move downtown....?"

Drug Abuse Comprehensive Coordinating Office (DACCO)

DACCO is a non-for profit agency that was founded in 1973 to provide drug abuse planning, coordination and monitoring for local governmental units. Today, DACCO is a major comprehensive community based substance abuse service system that specializes in prevention, intervention and treat programs to primarily Hillsborough County residents.

At least 51% (n=440) of the 855 respondents were not familiar with DACCO. Only 19.8% (n=171) of the 851 respondents had used or knew someone who had used the services of DACCO in the last 12 months.

Through the comments, the respondents related that they had personally or their sons, brothers, grandsons, fathers, other relatives and friends had received services from the organization. And, a number of the comments indicated that the services were helpful.

Community Health Advocacy Partnership, Inc. (CHAP)

The CHAP group was founded in 2003. Its mission is to advocate promote, and protect the health and safety of the community members of Hillsborough County. A particular emphasis is placed on minorities, the uninsured and the underinsured. The group's main strategies for accomplishing its mission include facilitating access to quality health services, integration of community disease prevention, intervention and education, case and self management, advocacy programming and strategic partnerships with public and private entities with a shared vision and mission.

The respondents were not aware of CHAP, in fact only 20.6% (n=178) of the 856 respondents were familiar the services. Only 13.2% (n=114) of the 848 respondents had used the services and most was in the health category (i.e., Diabetes testing).

Some respondents indicated use of CHAP through statements such as “I will go there.”

Churches

The churches in the community offered various services to address the social needs of the residents in the area. The respondents indicate that 36.5% (n=315) of the 847 respondents had received some social services from a church in East Tampa like food, clothing, tutoring or other services.

The service most often provided by the churches was food. Additionally, the churches most frequently cited for providing assistance were Abe Brown Ministries, Metropolitan Ministries and Deeper Life Ministries.

Other Organizations

The organizations in the area such as the COACH Foundation (private not for profit organization founded 1981), East Tampa Business and Civic Association, and Joshua Capital Group, Inc. (JCG) work to transform communities through the social, economic and cultural life of their neighborhoods. COACH works within various neighborhood communities in around Greater Tampa stressing a common sense approach to crime prevention, drug treatment, education, employment, personal awareness, and home ownership.

The data specified that at least 23.2% (n=200) of the 847 respondents received some social services from organizations of this type in East Tampa.

Services by the COACH Foundation were noted as helpful; however, a majority of the respondents were not aware of this group. East Tampa Business and Civic Association were noted in relationship to a crime watch meeting. The Joshua Capital Group, Inc. (JCG) , located in East Tampa, uses the following strategies to help communities consulting and leadership development, strategic planning and feasibility studies, “faith based initiatives” and community development, capital campaigns and annual stewardship programs, nonprofit development, church and nonprofit financing.

Other Support

Respondents were asked to further delineate their support systems, if they had not received services from their churches or other organizations in the East Tampa area. The number one support system cited by the respondents was family.

More specifically, the family unit provided financial assistance to 49% (n=426) of the 862 respondents. Financial help was the primary resource provided by the family.

Overall, the respondents were not as familiar with over half of the agencies in the community. The least familiar service was CHAP and the most familiar social agency was the Lee Davis Neighborhood service Center. The Lee Davis Center was also the most used service. Church familiarity and usage were about equal. The least used services were those presented by other organizations in the East Tampa Community.

Types of Services Used and Frequency

The questionnaire asked respondents to list the types of services either used by them or by someone they knew within each non-profit organization. The respondents were also asked to check whether or not these services were helpful. Respondents either denoted their response with a 'Y' / 'N', or a checkmark. It was unclear as to which part of the question the responses were meant to answer: 'Service used' or 'Was the service helpful?' Therefore, the researcher recorded either a checkmark or a 'Y' as indication that the service was used. The aspect of helpfulness was usually addressed in the comments section at the bottom of each page of the questionnaire.

The list of services to rank was based on those individual services each organization offered. For example, under the Corporation to Develop Communities of Tampa, Inc. (CDC) respondents were asked if they used services like open air markets, the East Tampa business center, and Osborne Landings apartments, to name a few. Generally, respondents were asked if they used health, affordable housing, youth services, life skills, employment, social, financial assistance, public safety, education or counseling services. The following table shows the ranking of the overall top ten services that respondents reported as using.

Table 6. Overall Top Ten Services Used by Respondents

Organization	Type of Service	Percentage of Respondents Who Used This Service
Lee Davis	Health	40.8% (n=352)
DACCO	Substance Abuse Prevention	23.0% (n=198)
Lee Davis	Social Services (WIC, Section 8)	16.6% (n=143)
Church	Other	15.0% (n=129)
Lee Davis	Financial Assistance	14.8% (n=128)
James Hargrett	Other	9.7% (n=84)
CDC	Job Placement	9.6% (n=83)
CDC	Open Air Markets	8.9% (n=77)
Lee Davis	Employment	8.7% (n=75)
Kimball School	Education	8.4% (n=72)

Participants' Perceived Need for Types of Services

Respondents were asked to rate at least forty-seven services in terms of how strongly they were needed in the East Tampa community. The range of personal, advocacy, social, medical and educational services was reviewed by respondents and each was prioritized. Below on Table 7 is the top ten list of perceived service needs for the area. Affordable Housing surfaced as the number one need and at least three of the top ten needs were related to housing. Further review ascertains that advocacy and medical needs were more pronounced as services that would improve the quality of life for the residents of East Tampa. As noted below dental care, disability service, visiting nurses and AIDS education highlight the respondent's medical requests. Additionally, there are three advocacy issues of disability services, affordable legal service and senior citizen programs.

Table 7. Participants' Perceived Need for Types of Services: by Rank Order

Rank Order		
Type of Service	Rating Average	Rank
Affordable Housing	4.68	1
Adult Dental Care	4.59	2
Senior Citizen Housing	4.58	3
Job Training	4.53	4
Senior Citizen Programs	4.52	5
Visiting Nurses	4.52	6
Affordable Legal	4.51	7
Disability (Support, Advocacy, Legal)	4.51	9
Homeless Program	4.51	10

Participants' Perceived Need for Types of Businesses

Each respondent was asked to prioritize the business needs for the East Tampa community. Twenty four business areas were provided and additional space was granted on the questionnaire for the respondents to write their ideas, if different from the list. The top ten businesses as requested by the respondents had an emphasis on retail, medical, and social service needs. Although, though there are retail stores currently in the area, at least four requests for additional stores surfaced in the top ten. The request was that these stores would be new in the neighborhood (i.e., new clothing). In fact, the number one request was for a super center like Wal-Mart or Target to be established in the neighborhood; the respondents did not want additional used clothing or furniture stores in the area. Furthermore, medical facilities and services such as chain drug stores, hospitals and dental care served to underscore the resident's perception of medical deficiencies in the area. Social service needs were identified as well as legal and financial. The actual request was to have more attorneys and have a credit union in the area.

Table 8. Participants' Perceived Need for Types of Businesses: Rank Order

Rank Order		
Type of Business	Rating Average	Rank
Super Center (Target, Wal-Mart)	4.57	1
Dentists	4.52	2
Chain Drug Stores	4.06	3
Clothing Stores-New	4.01	4
Hospital	4.01	5
Furniture Store-New	4.00	6
Hardware Stores-New	3.86	7
Chain Rests/Rest.	3.83	8
Credit Union	3.78	9
Attorneys	3.73	10

Summary of Questionnaire Comments

To further understand the respondents' views regarding services from the community agencies, an analysis of the questionnaire written comments was conducted. Although the verbatim comments from the 862 questionnaires were analyzed, not all questionnaires carried written responses. More specifically, there were two questions that served as stems to prompt the comments that were made by the respondents:

- “Have you or someone you know used the services of.....in the past year (12 months)?”
- “If yes, what services did you (or someone you know) use and were they helpful?”

In conjunction with the two stem statements, the statement that specifically requested comments from the respondents was: *Write any comments below, indicating service type by number when comments relate to a specific service type.*

The residents were definitive in regard to the comments made about the social and business needs of the community. The questionnaires revealed expressions that involved all aspects and encompassed needs of all age groups in the community. However, a repeated trend of thought for the social milieu was health services and the physical environment of the community. In addition to the social trends, a thematic expression of caring for others (e.g., homes for the homeless, care for AIDS patients, help for the elderly, the need for doctors and medical services) was also observed in the comments.

Moreover, the comments from the respondents indicated that the types of services the residents accessed within the community were directly related to the basic necessities of life—food, shelter, clothing and medical services.

Most of the comments (37%; n=333) centered on the support the residents received from their families followed by services received from Lee Davis Neighborhood medical services (23%; n=194), the various community churches (21%; n=178), and the James Hargrett Center (16%; n=137). Additionally, the support received from their families ranged from financial assistance to housing. Further review indicated that the agency most known and frequented in the community was the Lee Davis Center. From this agency, residents sought on the majority medical services. The James Hargrett Center appeared to have been the food stamp office for the community, for the majority of the comments about the center were about obtaining food stamps. However, comments by the respondents indicated

that the Hargrett Center is now closed. Churches primarily provided the residents with access to food and clothing. Several churches were consistently mentioned in the questionnaire comments as providing food and clothing—

1. Metropolitan Ministries,
2. Abe Brown Ministries,
3. First Baptist of Hill (church pastor founded the Abe Brown Ministries), and
4. Deeper Life Ministry.

As there were agencies with higher use ratings, there were several agencies with lower usage ratings. For example, residents accessed services from DACCO more frequently when compared to the remaining service agencies/ community organizations (13%; n=110) followed by services received from the CDC (11%; n=92) which focused primarily on use of the open air market, business plans and job placement, and educational services received from the Kimball Center (8%; n=70). CHAP and Community Organizations were least used by the residents (4%; n=37 and 38%; n=38). CHAP provides preventive medical services to the community while the community organizations such as the Coach Foundation provide support services to the residents.

Several statements were made involving the physical environment of the East Tampa community. Respondents indicated a need for parks in the neighborhood, paved roads, sidewalks, stop signs, and speed bumps. Respondents also questioned the lack of completion of various projects in the area. For example, one resident asked “when will they finish the Palm Park in front of 3415 E. Ellicott. It is sore eye for the community and disappointment.” A general comment was observed, “I would like to live in a nice clean area and have everything close by.”

Respondents also wanted increased security by having police surveillance to ensure safety. Locations were identified as providing issues related to negative environment for family life. Suggestions by the respondents range from removing the prostitutes at the car wash station to closing the local bar.

From a business perspective, the respondents identified the following businesses needed to improve the area:

1. stores;
2. restaurants;
3. entertainment; and
4. medical facilities.

Over 34% of the 116 comments indicated the need or desire for some type of store. Overwhelmingly the proposals were for a grocery store and in particular a full service grocery store such as Publix, Winn Dixie or super centers such as Wal-Mart or Target. Furthermore, comments were made regarding the need for the stores to be economical, yet maintain a quality level. This finding was also corroborated in the service ratings section of the questionnaire analysis. Within the top five rankings of businesses needed for the community, dentists ranked number two, drug stores number three, clothing stores number four, and furniture stores number five; superstores were number one.

Several other types of stores were also suggested such as auto and shoe repair, air conditioning, fabric, thrift, pet, shoe (better quality than Payless) and children's clothing. Restaurants represented at least 12% of the responses as to the type of businesses needed in the area. Respondents indicated a preference for the chain type restaurants such as Longhorn Steakhouse, Joe's Crab Shack or restaurants that would cater to family activity such as 'mom and pop' style (i.e., Buddy Freddy's), entertainment and programs for youth were also a high priority. The residents of the community indicated a desire for skating rinks, bowling alleys, gaming rooms, and movie theaters, etc. It should be noted that youth programs were not ranked in the top 10 priority items in the Service Rating portion of the questionnaire; Youth Centers (i.e., YMCA,) ranked 12 and Youth programs ranked 13.

The growth of new businesses in the area would contribute to the economic vitality of the East Tampa community by creating new jobs and allowing access to a wide range of goods and services. Moreover, in at least 8-10% of the comments denoted the advantage that new businesses would be in providing jobs and training for youth and young adults in the neighborhood.

Table 9. Questionnaire Comments Themes

Category	Supporting Statements
Physical Environment and Safety	<ul style="list-style-type: none"> • Residents expressed a need for <ul style="list-style-type: none"> ○ Paved Roads ○ Sidewalks ○ Clean Neighborhoods ○ Speed Bumps ○ More Police Protection ○ Removal of Night Club from area ○ Removal of Prostitutes
Medical	<ul style="list-style-type: none"> • Physicians who care for the <ul style="list-style-type: none"> ○ Eyes ○ Elderly ○ AIDS patients • Dentists • Walk-in Medical Clinic
Cultural/Social	<ul style="list-style-type: none"> • Movie Theater • Bookstores • Places for the elderly • Social outlets for youth <ul style="list-style-type: none"> ○ Game Room ○ Skating Rink
Businesses	<ul style="list-style-type: none"> • Grocery Stores • Super Centers • Malls/Department Stores • Restaurants • Repair Shop Services (Auto, A/C, Shoes, etc.) • Jobs

Focus Group Summary

The purpose of the focus groups was to provide the East Tampa citizens with an opportunity to state in their own words information about their community affairs. This process allowed residents of East Tampa an occasion to share their ideas about the needs, resource deficiencies, and lack of services in the neighborhood and to provide insight into what improvements should be established that would enhance the quality of living in the East Tampa area. They were also encouraged to prioritize needs according to their perceptions.

The focus groups process was held in the catchment area at the same time as the individual written surveys were being administered in the community. The focus groups were held for approximately two hours each session and each session was audio taped. This report summarizes the results of the comments that were expressed in the focus groups.

The focus groups consisted of a diverse population by location of interview, age, gender, and life circumstance. Over 100 respondents were interviewed in various settings such as churches, colleges, educational facilities, and community agencies. The ages range from young adults to senior citizens (18 to over 55 years of age). Some of the participants were from the prison reform system, students in GED programs, students in the community college system, and members of neighborhood associations.

The groups were asked standard questions and given opportunities to share their information, thoughts, and suggestions after each of the questions. This method was used to conduct a broader scan of the East Tampa Community and served to overcome the limitations of the pre-determined written questionnaire. Additionally, this method yielded insightful and in-depth results. For example, opinions and the insights of the residents obtained offered a greater understanding of their motivations and their beliefs. The assessment study used six focus groups from the East Tampa zip codes.

In review of the focus groups documents, several themes emerged as issues of concern such as communication, church roles and responsibilities, safety, employment and health. Additionally, citizens were aware of some of the services in the community, but unable to officially identify them. Furthermore most of the group participants were unable to describe services offered through the Corporation to Develop Communities of Tampa, Inc., CHAP, and the Sylvia Kimball Center. More citizens were aware of and had used the Lee Davis Neighborhood Service Center medical component than any other services.

Table 10 on the following page provides a more succinct summary of the themes that emerged from the focus group documents and a summary of the findings associated with the themes.

Table 10. Focus Group Themes

Themes	Summary Statements
<p>Social Services</p> <p>Primary</p> <ul style="list-style-type: none"> • Health • Education • Youth Programs <p>Secondary</p> <ul style="list-style-type: none"> • Safety • Code Enforcement • Police Harassment 	<p>Primary</p> <ul style="list-style-type: none"> • The respondents were interested in health issues (e.g., nutrition, exercise, and wellness). • Early childhood education /computer access & training • Wholesome programs and places for youth. <p>Secondary</p> <ul style="list-style-type: none"> • There was concerned expressed in regards to safety in the community for children and families. One respondent stated that there were 25 predators in the neighborhood on one street. • Citizens were concerned about the lack of efforts to clean the area i.e., vacant lots. • Indicated a need for advocacy on the behalf of juveniles and concerns with interactions with the local police force; citizens in the East Tampa Community have the perceptions that they are targeted for stops more often than citizens in other communities.
<p>Businesses</p> <p>Primary</p> <ul style="list-style-type: none"> • Supercenter • Family Restaurant • Dental/Hospital <p>Secondary</p> <ul style="list-style-type: none"> • Job Training • Job Placement 	<p>Primary</p> <ul style="list-style-type: none"> • The comments from the business survey revealed that hotels were a low priority for the community as compared to high desire for a Super Center in the community. Increase the number and quality of stores available to citizens in the East Tampa Community. • Family restaurant (i.e., Buddy Freddy's, Pizza service, etc.) • Lack of and current reduction of dental services for adults in the area. <p>Secondary</p> <ul style="list-style-type: none"> • Training for various jobs and businesses where they can be hired as a result of the training.
<p>Supportive Services</p> <p>Primary</p> <ul style="list-style-type: none"> • Transition Services for Inmates <p>Secondary</p> <ul style="list-style-type: none"> • Battered women • Legal services 	<p>Primary</p> <ul style="list-style-type: none"> • A number of individuals have been incarcerated which makes it difficult for them to acquire skills and even more difficult for them to find above poverty level wage jobs. <p>Secondary</p> <ul style="list-style-type: none"> • Although not mentioned by a number of respondents, there was a concern that women in the distress did not have a location for assistance • Younger respondents were interested in credit repair and the lack of quality legal assistance

Conclusions

The Corporation to Develop Communities of Tampa, Inc. through a partnership with the University of South Florida conducted a survey of the East Tampa community. The purpose of the study was to present the residents of East Tampa an opportunity to provide the community and City of Tampa with suggestions in regards to desired improvements in their community and how to best use funding resources to achieve them. Community workers from the East Tampa area were used to interview 993 respondents from the East Tampa neighborhoods as identified through zip codes.

Discussion

The needs assessment survey process consisted of both quantitative and qualitative measures. Community workers interviewed through a written questionnaire (quantitative) 862 respondents and 128 participated in seven different focus groups (qualitative). With both measures, the questions centered on the resident's awareness of current services and their perceptions of the service and business needs for the enhancement of the community.

The results from the survey (quantitative) are as follows:

- Overall the respondents were not as familiar with over half of the agencies currently providing services in the community. The Lee Davis Neighborhood Service Center was the most familiar and the most used agency. The Community Health Advocacy Partnership, Inc. was not only the least familiar; it was also the least used agency.
- The services most used by the respondents were related to health or social services. In particular, the top three services used were health, substance abuse prevention and social services related.
- The respondents' perceived housing as the number one service need in the community. In fact, three of the top ten related to housing conditions i.e., affordable housing, senior citizen housing and the homeless. Adult dental care was the second most requested service.
- Survey data indicated that the respondents' perceived super center stores as the number one type of business followed by the need for dentists in the area. The themes from the respondents' comments corroborated the service rating section of the questionnaire. More specifically, within the top five rankings of the business needs for the community, the comments and ratings suggested stores are needed, especially super stores such as Wal-Mart, Target, chain drug stores, and clothing stores that sell new items. Additionally, dentists were cited as one of the top five business needs for the area. A specific consideration was requested that the stores sell new rather than old products; no thrift stores.
- One of the most significant findings indicated that the family was the number one support system in the community.

The themes derived from the focus groups were consistent with the findings of the questionnaire. The focus groups (qualitative measure) themes as did the questionnaire, addressed social, business, and services areas. The primary themes that emerged from the focus groups were:

- The respondents were concerned about health, education and youth programs.
- The respondents were also concerned about their physical environment and safety in the neighborhoods. They often expressed desires to have clean neighborhoods and more police protection for safety.

- The respondents expressed a desire for family style restaurants (e.g., mom and pop or chain—Buddy Freddy’s).
- The respondents perceived that bringing new businesses into the community would also translate into job training and employment opportunities.
- Finally assistance was desired for women in distress as well as transition services for recently released inmates and legal/credit repair services.

Study Limitations

The focus group was used to conduct a broader scan of the East Tampa Community and served to overcome the limitations of the pre-determined written questionnaire. However, the focus group respondents were asked the same questions that appeared on the written questionnaire. Open ended and not predetermined questions should be used to offer a clearer perspective of the respondents’ ideas without the guidance of the written questionnaire and/or the focus group leader(s). Additionally, another limitation of the study was the request for the respondents’ perception of others’ usage of services in the community. For example, respondents were asked if they knew someone who had used a service if they themselves had not, and were asked to rate the usefulness of the service used by individuals other than themselves. In essence the respondents were asked to respond on the behalf of others. The manner in which the respondents were asked to rate the usefulness of the service was not clear. For example, the respondents were asked to check on the questionnaire whether the services received by them or others were helpful. They denoted their responses with a ‘Y’/‘N’, or check mark. It was unclear as to which part of the question the responses were meant to answer: ‘Service used’ or ‘Was the service helpful.’ Moreover, all questions on the survey were not answered and in some cases the instructions for administering the questionnaire were not clearly followed, leaving the individual administering the questionnaire to their own interpretation.

R ECOMMENDATIONS

The City of Tampa Existing Conditions Report (2004) indicates that high crime rates and poverty are major weakness creating feelings of “hopelessness,” lack of communications and cohesiveness between community organizations, and “disconnect caused by interstate and dead end road.” The community reported numerous service providers and nonprofits which are not coordinated in East Tampa. Strengths reported in this report were the existence of infrastructure of schools, churches, and social services, leadership and the existing population working towards solutions within neighborhood groups.

The HESS committee will recommend to the overall ETCRP that this Needs Assessment is the beginning effort to develop a comprehensive strategy with governmental agencies, city, county, state and national, along with local service agencies, non-profit groups and local residents to address a comprehensive approach for developing a system of services in the East Tampa area. We propose that governmental agencies work with HESS to establish a planning team that will ensure coordination, monitoring, an accountability of programs and services in the East Tampa area. HESS proposes to use the input and feedback from this Needs Assessment to guide existing community agencies, programs and services to support existing resources for developing and implementing a comprehensive and coordinated system of services. HESS proposes a need to develop and establish an East Tampa health, education and social services collaborative partnerships with existing community agencies, programs, services and participating residents to provide a mechanism for a community networking strategy. Together, families and stakeholders will develop a community networking strategy that will support existing resources, develop and implement a comprehensive and coordinated system of services families. An immediate action is to construct an action plan written by a collaboration of stakeholders. This action plan will provide the foundation for addressing a goal of HESS; enhance the quality of life of residents for sustainable community revitalization and self-sufficiency in East Tampa.

This Needs Assessment will assist HESS in directing the mission and guiding principles.

Recommendations

Planning

1. Develop a community profile of health, educational and social service disparities that will direct program services and impact
2. Develop a process of engagement with planning, policies, services, and advocacy for East Tampa residents. Through this engagement of the residents, a determination of how human services and human capital can be integrated with community and economic development will complete the enhancement of the area.
3. Develop better communication strategies to inform residents of agencies in and their services to the community. Given the fluctuating funding for services, it is important that such communication be dynamic.

4. Enhance the collaborative efforts between social service agencies, churches, civic and business associations and the residents of the East Tampa area to address improvements in the physical environment and safety concerns in the community.
5. Engage residents in a participatory process with planning, services, advocacy and policies for East Tampa, determining how human services and human capital development can be integrated with community and economic development.
6. Orient local service programs to the HESS committee and ETCRP to promote coordination and improve service delivery in the East Tampa area.
7. Create and establish a neighborhood technology center working with local community supports including neighborhood associations, faith-based intuitions and existing agencies to improve service delivery in the East Tampa area.

Services

8. Review the medical services at the Lee Davis Neighborhood Service Center to examine the possibility of including dental services for adults.

Businesses

9. Further develop a plan to attract businesses to increase job training and employment opportunities in the East Tampa area.
10. Conduct a feasibility study to determine the viability of a superstore for the area.

Housing

11. Review existing affordable housing availability and conduct a feasibility study to address housing for the elderly and homeless.



APPENDICES

Appendix A:

East Tampa Community Needs Assessment Informed Consent

We are conducting a survey because we want to learn from you about how you would like to see things done in East Tampa, what improvements you would like to see in East Tampa, and what you would like created in East Tampa. Twelve years ago we conducted a survey like this through the CDC of Tampa, Inc. Many of the services that residents then said East Tampa needed in the area were developed. There is now another opportunity to provide input to the East Tampa community and to the City of Tampa Mayor. We believe your input will help shape the development of East Tampa and its future.

We are asking you to participate in this survey because you are a resident of the community, and you have knowledge about the community, its services and businesses. Your views are valued. We will ask you questions about current services, possible future services and possible future businesses in the area. The survey will take about 20 minutes to complete.

We will record your answers and comments about services; type them up without any names or identifying information. Your opinions and information will remain anonymous. The information will be analyzed by representatives from the University of South Florida. The results will be given to the East Tampa Community Revitalization Partnership, each of the governing Boards of agencies mentioned in this survey and a copy to the Mayor's office.

Your participation is completely voluntary. If you agree to participate, the information you provide will not be connected in any way with your name or anyone else's. The summary report will not contain any of the names of people who answered the survey, and there will be no way to identify who said what in these surveys.

By signing this form, you are providing consent or permission to participate in this survey. You are consenting for your comments to be used, and for a summary report to be shared with the Partnership, agencies, and Mayor. The signed sheets will be kept separate from the report and never shared with others.

If you have any questions about this survey, please contact Maxine Woodside (248-6548, ext. 223) or Harold Keller (974-6709).

Your consent – by signing this form I agree that:

- I have fully read or have had read and explained to me this informed consent form describing a survey.
- I have had the opportunity to question one of the persons in charge of this project and have received satisfactory answers.

- I understand that I am being asked to participate in a survey. I understand the risks and benefits, and I freely give my consent to participate in the project outlined in this form, under the conditions indicated in it.
- I have been given a signed copy of this informed consent form, which is mine to keep.

Signature of Participant

Date

Print Name

Appendix B:
QUESTIONNAIRE

Needs Assessment for the East Tampa Community

Conducted by the Health, Education, and Social Services Committee
Of the East Tampa Community Revitalization Partnership (ETCRP),
In Partnership with ET NOW, CDC of Tampa, Inc. (an affiliate of Neighbor Works, Healthy Start and The
University of South Florida

The purpose of this survey is to give you an opportunity to give your ideas about how you would like to see things done and created and improved in East Tampa and to provide the community and City with background information about the current demographics in East Tampa and how to allocate funding to best meet the needs of residents of the area. Your opinions and information will remain **completely anonymous**. The information will be analyzed by representatives from the University of South Florida. The results will be given to the East Tampa Community Revitalization Partnership, each of the governing Boards of agencies mentioned in this survey and a copy to the Mayor's office.

I am going to ask you about various non-profit organizations that provide social services in East Tampa. For each organization, I will ask you whether you are familiar with the non-profit and what it does. If you are aware of the organization, then I will ask you if you have gotten any services from that organization, and, if so, which services and how effective they were.

We are asking you to participate in this survey because you are a resident of the East Tampa community, and you have knowledge about the community, its services and businesses. Your views are valued. We will ask you questions about current services, possible future services and possible future businesses in the area. The survey will take about 20 minutes to complete.

We will record your answers and comments about services; type them up without any names or identifying information. Your opinions and information will remain anonymous. Your participation is completely voluntary. When you complete the survey, we will give you information brochures about many of the agencies in East Tampa and \$10 as a token of our appreciation for your time and opinions.

Questions & Probes	Answers
<p>1) Are you familiar with the Corporation to Develop Communities (or CDC) of Tampa? It is located at 2631 E. Lake Avenue. Have you or someone you know used the services of CDC in the past year (last 12 months)?</p> <p>If yes, What services did you (or someone you know) use and were they helpful?</p> <p>If no, mention a few of the categories of services to see if that helps the person remember any of the services.</p> <p>If still not familiar with any services with this agency, go on to the next agency.</p>	<p>Familiar? ____ Yes ____ No</p> <p>Used? ____ Yes ____ No</p> <p>Check service type & check Helpful Y/N:</p> <p>1) Markets _____</p> <p>2) Affordable Housing _____</p> <p>3) Youth Services _____</p> <p>4) ET Business Center (Incubator) _____</p> <p>5) Job Placement _____</p> <p>6) Apartments (Osborne Landings) _____</p> <p>7) Small Business Training _____</p> <p>8) Banking _____</p> <p>9) Taxes _____</p> <p>10) Other _____</p> <p>Write any comments below, indicating service type by number when comments relate to a specific service.</p>

Questions & Probes	Answers
<p>2) Are you familiar with the Lee Davis Neighborhood Service Center? It is located at 3402 N. 22nd St. Have you or someone you know used the services of Lee Davis Center in the past year (last 12 months)?</p> <p>If yes, What services did you (or someone you know) use and were they helpful?</p> <p>If no, mention a few of the categories of services to see if that helps the person remember any of the services.</p> <p>[During training, get names of programs and connect them with numbers on right]</p> <p>If still not familiar with any services with this agency, go on to the next agency.</p>	<p>Familiar? ____ Yes ____ No</p> <p>Used? ____ Yes ____ No</p> <p>Check service type & check Helpful Y/N:</p> <p>1) Health Services _____</p> <p>2) Affordable Housing, Apartments _____</p> <p>3) Youth Services _____</p> <p>4) Life Skills _____</p> <p>5) Employment Services _____</p> <p>6) Social Services (WIC, Section 8) _____</p> <p>7) Financial Assistance _____</p> <p>8) Public Safety _____</p> <p>10) Other _____</p> <p>Write any comments below, indicating service type by number when comments relate to a specific service.</p>

Questions & Probes	Answers
<p>3) Are you familiar with the Kimball Full Service School of Hillsborough County Public Schools? It is located at 2100 E. 26th Ave. Have you or someone you know used the services of Kimball School in the past year (last 12 months)? If yes, What services did you (or someone you know) use and were they helpful?</p> <p>If no, mention a few of the categories of services to see if that helps the person remember any of the services. [During training, get names of programs and connect them with numbers on right]</p> <p>If still not familiar with any services with this agency, go on to the next agency.</p>	<p>Familiar? ____ Yes ____ No</p> <p>Used? ____ Yes ____ No</p> <p>Check service type & check Helpful Y/N:</p> <p>1) Health Services ____</p> <p>2) Affordable Housing, Apartments ____</p> <p>3) Youth Services ____</p> <p>4) Life Skills ____</p> <p>5) Employment Services ____</p> <p>6) Social Services (WIC, Section 8) ____</p> <p>7) Financial Assistance ____</p> <p>8) Public Safety ____</p> <p>9) Education Services ____</p> <p>10) Homeless Families w/ Children ____</p> <p>11) Other ____</p> <p>Write any comments below, indicating service type by number when comments relate to a specific service.</p>
Questions & Probes	Answers

If still not familiar with any services with this agency, go on to the next agency.

Write any comments below, indicating service type by number when comments relate to a specific service.

Questions & Probes	Answers
<p>5) Are you familiar with the Drug Abuse Comprehensive Coordinating Office, Inc (DACCO)? It is located at 4422 E. Columbus Drive. Have you or someone you know used the services of DACCO in the past year (last 12 months)?</p> <p>If yes, What services did you (or someone you know) use and were they helpful?</p> <p>If no, mention a few of the categories of services to see if that helps the person remember any of the services.</p> <p>[During training, get names of programs and connect them with numbers on right]</p> <p>If still not familiar with any services with this agency, go on to the next agency.</p>	<p>Familiar? ____ Yes ____ No</p> <p>Used? ____ Yes ____ No</p> <p>Check service type & check Helpful Y/N:</p> <p>1) Health Services _____</p> <p>2) Affordable Housing, Apartments _____</p> <p>3) Youth Services _____</p> <p>4) Life Skills _____</p> <p>5) Employment Services _____</p> <p>6) Social Services (WIC, Section 8) _____</p> <p>7) Financial Assistance _____</p> <p>8) Public Safety _____</p> <p>9) Substance Abuse prevention/outreach _____</p> <p>10) Other _____</p> <p>Write any comments below, indicating service type by number when comments relate to a specific service.</p>
Questions & Probes	Answers

<p>7) Have you received any social services from a church in East Tampa, like food, clothing, tutoring, or other services like I have mentioned for the other agencies?</p> <p>If yes, What church and what services did you (or someone you know) use and were they helpful?</p> <p>7a) Have you received any social services from a non-profit organization in East Tampa, like ET Civic Organization, Coach Foundation, or Joshua Capital?</p> <p>If yes, What organization and what services did you (or someone you know) use and were they helpful?</p> <p>If no, mention a few of the categories of services to see if that helps the person remember any of the services.</p> <p>If still not familiar with any services with this agency, go on to the next questions.</p>	<p>Familiar? ____ Yes ____ No</p> <p>Used? ____ Yes ____ No</p> <p>Check service type & check Helpful Y/N:</p> <table style="width: 100%;"> <tr> <td>1) Health Services</td> <td>_____</td> </tr> <tr> <td>2) Affordable Housing, Apartments</td> <td>_____</td> </tr> <tr> <td>3) Youth Services</td> <td>_____</td> </tr> <tr> <td>4) Life Skills</td> <td>_____</td> </tr> <tr> <td>5) Employment Services</td> <td>_____</td> </tr> <tr> <td>6) Social Services (WIC, Section 8)</td> <td>_____</td> </tr> <tr> <td>7) Financial Assistance</td> <td>_____</td> </tr> <tr> <td>8) Public Safety</td> <td>_____</td> </tr> <tr> <td>10) Other</td> <td>_____</td> </tr> </table> <p>Write any comments below, indicating service type by number when comments relate to a specific service. Identify Church or Organization, if person gives name or location:</p> <hr/>	1) Health Services	_____	2) Affordable Housing, Apartments	_____	3) Youth Services	_____	4) Life Skills	_____	5) Employment Services	_____	6) Social Services (WIC, Section 8)	_____	7) Financial Assistance	_____	8) Public Safety	_____	10) Other	_____
1) Health Services	_____																		
2) Affordable Housing, Apartments	_____																		
3) Youth Services	_____																		
4) Life Skills	_____																		
5) Employment Services	_____																		
6) Social Services (WIC, Section 8)	_____																		
7) Financial Assistance	_____																		
8) Public Safety	_____																		
10) Other	_____																		

Please rate each of the following services in terms of how strongly you believe they are needed in the East Tampa community: 5 = Highest Priority; 3 = Middle Level Priority; 1 = Needed, but Low Priority
0 = Not needed at all

[Interviewer: Note any comments by number on back]

Priority Rating

- | | | |
|-----|-----|--------------------------------------------------------------------------------|
| ___ | 1) | Adult Dental Care Services |
| ___ | 2) | Adult Education Services |
| ___ | 3) | Affordable Childcare |
| ___ | 4) | Affordable Housing |
| ___ | 5) | Affordable Legal Service |
| ___ | 6) | After School/education Programs |
| ___ | 7) | Additional School Service/Educational Programs |
| ___ | 8) | Community Based Affordable Women's Programs |
| ___ | 9) | Community Information/Referral Center |
| ___ | 10) | Community Input to Decisions about East Tampa |
| ___ | 11) | Computer Training |
| ___ | 12) | Convalescent Homes |
| ___ | 13) | Credit Repair Programs |
| ___ | 14) | Mental Health Counseling (Culturally Appropriate) |
| ___ | 15) | Disability Services (Support, Advocacy, Legal) |
| ___ | 16) | Drug/Alcohol Rehabilitation Centers |
| ___ | 17) | Faith Based Programs |
| ___ | 18) | Family Activity Centers |
| ___ | 19) | Health Care Advocacy |
| ___ | 20) | Home Buying Workshops |
| ___ | 21) | Homeless Program |
| ___ | 22) | Housing Outreach |
| ___ | 23) | Job Training |
| ___ | 24) | Job Placement Center |
| ___ | 25) | Juvenile Rehabilitation Center |
| ___ | 26) | Marriage, Couples & Family Counseling Services |
| ___ | 27) | Meeting Space (e.g., schools, Kimball, Hargrett, Churches, new Police Station) |
| ___ | 28) | Mentoring Program |
| ___ | 29) | Neighborhood Charter Schools |
| ___ | 30) | Parent Advocacy Groups for Schools |
| ___ | 31) | Parks/Recreation |
| ___ | 32) | Political Education & Ongoing Voter Registration |
| ___ | 33) | Preschool Education Programs |
| ___ | 34) | Business Recruitment for Economic Development of ET |
| ___ | 35) | Satellite Medical Personnel |

- ___ 36) Senior Citizen Housing
- ___ 37) Senior Citizen Programs
- ___ 38) Swimming Pools
- ___ 39) Teenage Parenting Class
- ___ 41) Transition Services for Former Inmates
- ___ 42) Visiting Nurses Services
- ___ 43) Youth Activity Centers (YMCA)
- ___ 44) Youth Programs
- ___ 45) AIDS Education (Tampa AIDS Network)
- ___ 46) Child Care (Information/Referral)
- ___ 47) Truancy Prevention Center

Please rate each of the following businesses in terms of how strongly you believe they are needed in the East Tampa community: 5 = Highest Priority; 3 = Middle Level Priority; 1 = Needed, but Low Priority
0 = Not needed at all. [Interviewer: Note any comments by number below or on back]

Priority Rating

- ___ 1) Air Condition Repair Centers
- ___ 2) Appliance Stores (New)
- ___ 3) Attorneys
- ___ 4) Auto Repair Shops
- ___ 5) Bakeries
- ___ 6) Banks
- ___ 7) Chain Drug Stores
- ___ 8) Chain Restaurants/Restaurants
- ___ 9) Clothing Stores (New)
- ___ 10) Copy Centers
- ___ 11) Credit Union
- ___ 12) Dentists
- ___ 13) Furniture Stores (new)
- ___ 14) Hardware Stores (new)
- ___ 15) Hospital
- ___ 16) Hotels
- ___ 17) Ice Cream Shops
- ___ 18) Insurance Companies
- ___ 19) Mortgage Companies
- ___ 20) Panera Bread
- ___ 21) Pizza Parlors
- ___ 22) Shoe Stores (new)
- ___ 23) Starbucks Coffee
- ___ 24) Super Center (Target, Wal-Mart)

[illegible]

To be answered only by a household member above the age of 18

- 1) Gender
☐ Male
☐ Female
- 2) How do you classify your race (indicate one or more)?
☐ American Indian
☐ Asian/Pacific Islander
☐ Black or African American
☐ Hispanic/Latino
☐ White non-Hispanic
☐ Other
- 3) What is your current living situation?
☐ Married
☐ Living with a partner
☐ Married but separated
☐ Widowed
☐ Single, divorced
☐ Single, never married
- 4) Where do you live?
☐ Single Family Home
☐ Apartment/Condo Building
☐ Trailer
☐ Temporary Shelter/Homeless
☐ Group Home/Assisted Living Facility

____ With a friend or family member in their place, temporarily

5) Do you own or rent your home?

____ Own

____ Rent

If you are a renter, do you have a Section 8 voucher/certificate?

If you are a renter, have you previously lived in public housing during the past 10 years?

6) Do you currently live in public housing?

____ Yes

____ No

7) Including yourself, how many people are in your household? (circle one)

1 2 3 4 5 6 7 8 9 or more

8) What are the ages of people who live in your household?

Yourself _____

Other person #1: _____

Other person #2: _____

Through Other person #9:

1 2 3 4 5 6 7 8 9 or more

9) How long have you lived in your current home?

____ Less than 3 months

____ 3 months to 1 year

____ 1-3 years

____ 3-5 years

____ 6-10 years

____ 10+ years

10) What is your zip code? _____

What was the zip code of the home where you lived immediately prior to your current home?

11) How long did you live in that home?

____ Less than 3 months

- ☐ 3 months to 1 year
- ☐ 1-3 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 10+ years

12) What is the principal language you speak at home?

- ☐ English
- ☐ Spanish
- ☐ Other

13) What is the highest level of education you have completed??

- ☐ Less than high school
- ☐ High School graduate or GED
- ☐ Some college or technical school
- ☐ Associate degree (AA, AS, CAN, LPN) or at least 2 years of college
- ☐ College Bachelor's degree (BA, BS, RN)
- ☐ Advanced Degree

14) What is your current employment status?

- ☐ In school full time/not employed
- ☐ In school part time /employed
- ☐ Work full time
- ☐ Work part time
- ☐ Retired
- ☐ Disabled
- ☐ Unemployed/Don't Work

15) If you work, what is the zip code of your place of work?

Do you work in a...?

- ☐ Private Office
- ☐ Retail Store
- ☐ Factory
- ☐ School
- ☐ Government agency
- Other

16) How do you typically get to work/school?

☐ Walk
☐ Bike
☐ My own car
☐ Bus/van
☐ Car Pool
☐ Taxi
Other

17) What was your total household income for 2006, including work and all government assistance checks? (check one, best guess if necessary)

☐ Below whatever the current poverty rate is
☐ \$5,000 - \$12,499
☐ \$12,500 - \$19,999
☐ \$20,000 - \$29,999
☐ \$30,000 - \$39,999
☐ \$40,000 - \$49,999
☐ \$50,000 - \$59,999
☐ \$60,000 - \$69,999
☐ \$70,000 - \$79,999
☐ \$80,000 - \$89,999
☐ \$90,000 or more

18) Do you currently receive any public assistance?

☐ No
☐ Yes

If yes, please list all that apply

TANIF

Food Stamps

others

Thank you very much for your help in this important survey. We anticipate that the results of these surveys will be very informative and helpful to the community development of East Tampa.



East Tampa Needs Assessment Training Manual

Prepared by:
Terry Tinsley



PURPOSE STATEMENT

We are conducting a survey because we want to learn from you about how you would like to see things done in East Tampa, what improvements you would like to see in East Tampa, and what you would like created in East Tampa.

Twelve year ago, we conducted a survey like this through the CDC of Tampa, Inc. Many of the services that residents then said East Tampa needed in the area were developed. There is now another opportunity to provide input to the East Tampa community and to the City of Tampa Mayor. We believe your input will help shape the development of East Tampa and its future.

We are asking you to participate in this survey because you are a resident of the community and you have knowledge about the community, its services and businesses. Your views are valued. We will ask you questions about current services, possible future services and possible future businesses in the area. The survey will take about 20 minutes to complete.

We will record your answers and comments about services and type them up without any names or identifying information. Your opinions and information will **remain anonymous**. The information will be analyzed by representatives from the University of South Florida. The results will be given to the East Tampa Community Revitalization Partnership, each of the governing Boards of agencies mentioned in this survey and a copy to the Mayor's office.

Your participation is completely voluntary. If you agree to participate, the information you provide will not be connected in any way with your name or anyone else's. The summary report will not contain any of the names of people who answered the survey, and there will be no way to identify who said what in these surveys.

By signing this form, you are providing consent or permission to participate in this survey. You are consenting for your comments to be used, and for a summary report to be shared with the Partnership, agencies, and Mayor. The signed sheets will be kept separate from the report and never shared with others.

If you have questions about this survey, please contact Maxine Woodside (248-6548, ext. 223) or Harold Keller (974-6709).

LOCATION & HOURS OF OPERATION

The office is located at Cornerstone Family Ministries (formerly the Wolff Center), 2801 N. 17th St. Tampa, FL 33605, Telephone number 248-6259 Ext. 223. The building operate with flexible hours to allow personnel to gather and turn in material, receive supplies, make telephone calls, and receive payments.

Interviewers **may not** be able to conduct surveys during normal office hours due to homeowners/renters work schedules. As such, work hours are flexible.



GETTING STARTED



There are a few strategies in successfully conducting interviews and surveys for residents of East Tampa. The materials used for the training sessions and in the field are user friendly. Our first goal is to alert residents to our presence in the area and inform them of our purpose.

There are approximately 800 interviews to be conducted. Many will take place in the field while others will be conducted through focus groups. Interviewers are required to work within an assigned grid area. You will be given maps, door tags, and all necessary material to complete the surveys.

Program Coordinators will work with neighborhood associations/organizations to compile listings of residential household to be interviewed. From this list, the interviewer will attempt to successfully complete the survey. If the resident is not home, leave a “Sorry I Missed You” door tag with your Program Coordinator’s name and contact number. The coordinator will receive phone calls and schedule return visits.

Read over the material concerning the East Tampa Revitalization Partnership and know the purpose of conducting the survey. Be prepared to be asked questions. If the resident make inquiries, please answer them courteously and honestly. It is also important to **stress** that the interviews are **voluntary and their responses will be kept confidential**. Residents will be watching from behind the curtains, so be mindful of your actions.

While in the field, you may run into University of South Florida volunteer students. They will be passing out information about the Partnership.

EMPLOYEE RESPONSIBILITIES

*As you go out into the neighborhood to conduct the surveys, please remember that you represent the East Tampa Community Revitalization Partnership, various governing agencies, the City of Tampa Mayor and YOU. **Someone is always watching - - - you may not see them, but they will see you! Be courteous and professional.***

Program Coordinator

Program Coordinators are responsible for issuing surveys and assigning grid numbers. They will also verify that you have completed the surveys satisfactorily. Your coordinator will make arrangements with their interviewers to pay residents completing the survey. They are also responsible for ensuring that the tasks remain on schedule. You are required to meet as determined by your coordinator. The Program Coordinator will work with the Program Administrator to gather or disseminate information to staff.



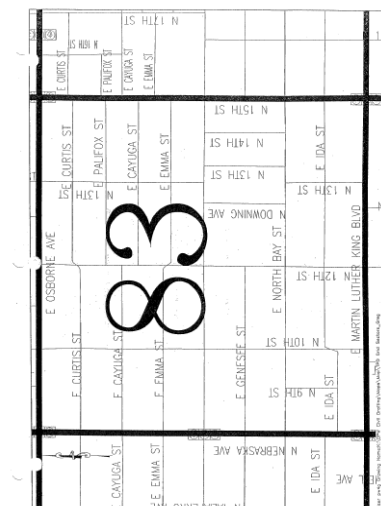
Interviewer

The interviewer is expected to promote the East Tampa Revitalization Partnership when conducting interviews. You will meet with your coordinator as required, however, you **must** meet at least once a week to gather or turn in material. You may be asked to make payment to the interviewee. If this is the case, you will be required to sign receipts for any money distributed and have the residents acknowledge receipt of payment.

MATERIAL ISSUE

Each interviewer will be issued the following material:

- Identification badges
- Surveys (amount/numbers to be determined by Program Coordinator)
- Grid Maps
- Door tags (Sorry We Missed You)
- Clipboard
- Pens, Markers, Pencils



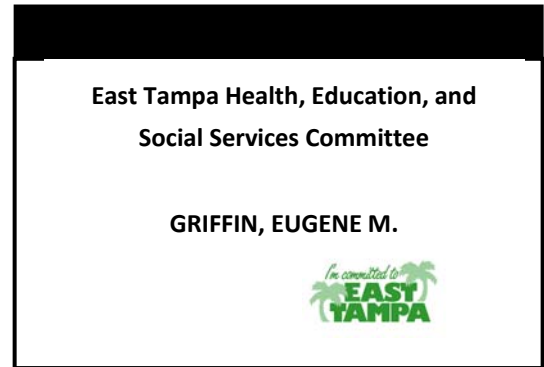
DRESS CODE

Each interviewer is expected to wear:



- Identification badge
- Jeans or slacks

As representatives of the Partnership, employees are required to wear clean attire in the department of their duties.



SAFETY FIRST

Safety in conducting the surveys in the field is ***extremely important!***

In order to ensure the safety of residents of East Tampa, you are **required to wear your “I am Committed to East Tampa” identification badge. Failure to do so will result in your immediate termination (all lost or stolen items to your program coordinator before returning to the field).**



We are asking East Tampa residents to open their doors and speak with you. After an extensive advertisement campaign, residents will be looking for you to come into their neighborhoods. This also means that **criminals will also be looking for an opportunity to take advantage of residents willing to open their doors.** Surely, you don't want *your* negligence to result in potential harm to residents. **BE ALERT, BE PROFESSIONAL, BE IN UNIFORM.** This will reduce the risk of threat of criminal activity.

For your safety and protection, interviewers **may decide** to work in teams when in the field. The minimum distance from your partner should **not exceed 50 yards** (sight or hearing range). You are allowed to work on opposite ends of a street or parallel to your partner.

Below is a list of conditions in which you will be required to record the address of households you were unable to survey. Your coordinator will periodically spot

check the address provided and verify the residence as unsafe or unable to survey.

Keep the following situations in mind as you prepare for field duty:

- **Never enter a residence alone!** If resident is insistent, explain that it's against company policy.
- Do not approach a residence that does not 'feel' right to you; instead, record the address and leave a notification tag with contact information.
- Do not approach fenced in properties with animals; instead, leave a notification tag on mailbox with contact information.
- If ordered to vacate the property, do so immediately!



WHAT TO EXPECT

Working in the field requires patience and excellent communication skills. Listed below are some of the things you will experience when conducting the surveys:

- Expect residents to be hesitant in responding to you.
- Expect residents to not want to disclose personal information.
- Expect that **some** residents **will** be rude.
- Expect **some** profanity/hostility from residents.
- Expect **some** residents who miss conversations to prolong the interview.
- Expect **not** to be invited into **most** residential homes.
- Residents expect honesty (tell how long the survey will take).
- Residents are busy and don't want to be bothered with the survey.

SCRIPTS/TIPS FOR CONDUCTING THE SURVEY

SCENARIO #1

Interviewer:

"Good evening, my name is _____, and I am here on behalf of the East Tampa Health, Education, and Social Service Committee. May I please

Speak with you for two minutes? **I'm not here to sell anything, I just need your opinion on East Tampa services.**

Resident:

"I'm not interested".

Interviewer:

Okay, **ONE MINUTE.** If I don't get you interested in one minute, I promise I'll leave. Surely, you have one minute.

Resident:

"I'm not interested."

"I'm on the phone."

"I'm busy."

*******They are turning away and closing the door. *******

Interviewer:

*******Speak a little louder (don't shout)! *******

Did you know a portion of your tax dollars are being set aside to bring those services the majority of East Tampa residents would like to see? If you won't tell us what you want, somebody else will make the decision for you.

Or

"You don't struggle with health expenses?"

"You're not curious about what going on in East Tampa?"

"You're not interested in a possible job opportunity for yourself or family?"

"Do you know where to find assistance for 'all' of your needs?"

*******They are still listening.... You have a sell! Make your pitch. *******

In June 2006, the City of Tampa and Hillsborough County passed a revitalization act to improve the living conditions of this community. I am here conducting a

survey to find out if you know of the services that are available in the community and what services you would like to see in East Tampa as far as health, education, and social services. The survey will take approximately 20 minutes to complete. You don't have to answer any questions you don't like and all of your answers will be kept confidential.

MAY WE GET STARTED.....

SCENARIO #2

Interviewer:

"Good evening, my name is _____, and I am here on behalf of the East Tampa Health, Education, and Social Service Committee. May I please speak with you for two minutes? **I'm not here to sell anything, I just need your opinion on East Tampa services.**"

Resident:

"Two minutes?"

Interviewer:

"Two minutes to explain the purpose of the survey and what's happening in East Tampa. The actual survey takes about twenty minutes to complete."

Resident:

"What kind of stuff do you want to know?"



Interviewer:

“Well let’s see. How about ... **proceed with conducting the interview.**”

SCENARIO #3

Interviewer:

“Good evening, my name is _____, and I am here on behalf of the East Tampa Health, Education, and Social Service Committee. May I please speak with you for two minutes? **I’m not here to sell anything, I just need your opinion on East Tampa services.**”

Resident:

“I ain’t working right now, I ain’t got no money, my house is dirty so I can’t invite you in right now.”

Interviewer:

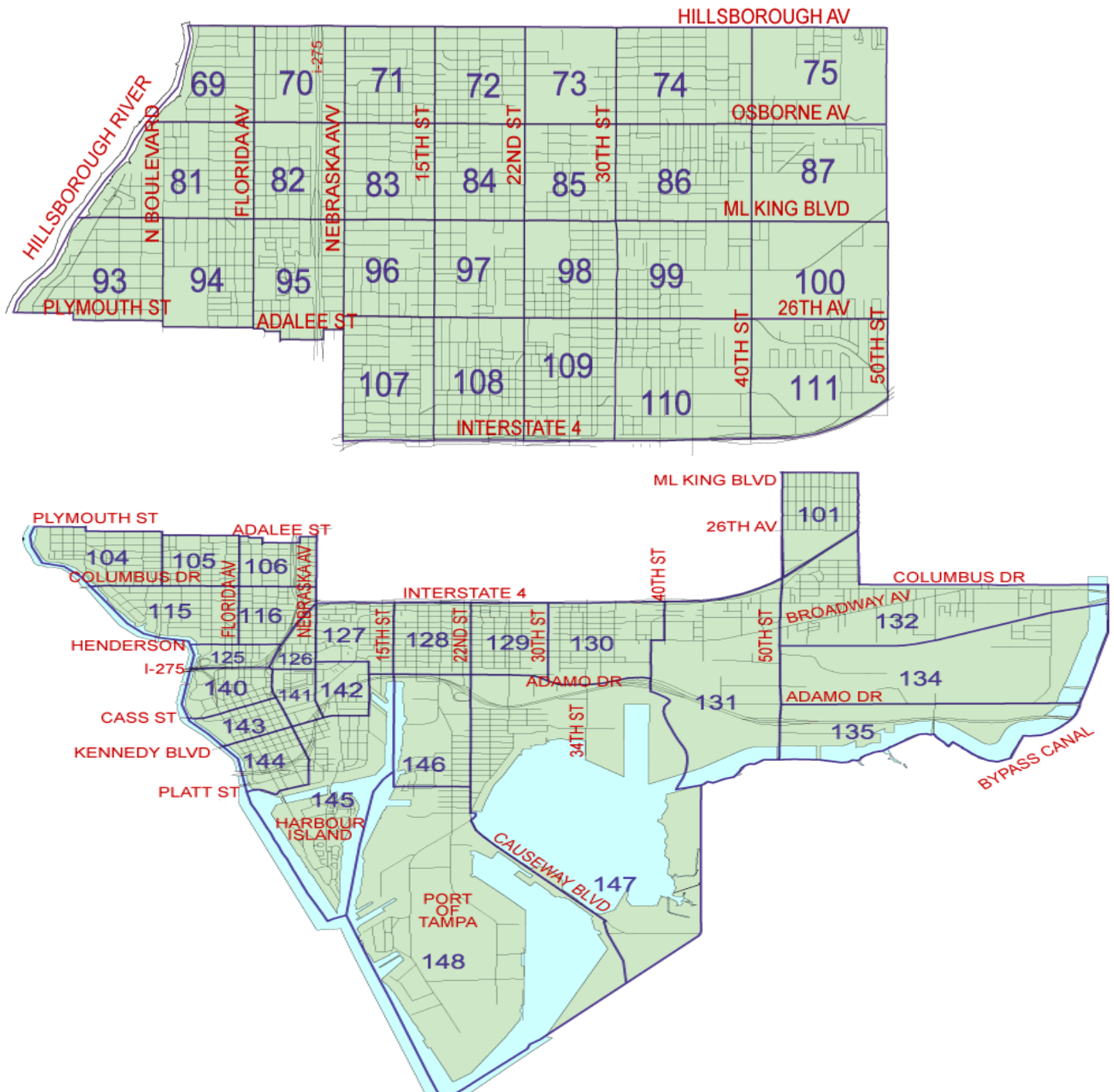
“That’s okay. It’s not necessary for you to be employed and I’m not selling anything. If you don’t mind, we can stand out here on the porch for a few minutes. It sounds to me like you’d be perfect for this survey. It’ll only take you about twenty minutes (depending on your answers) and I’m sure we will both learn something today.

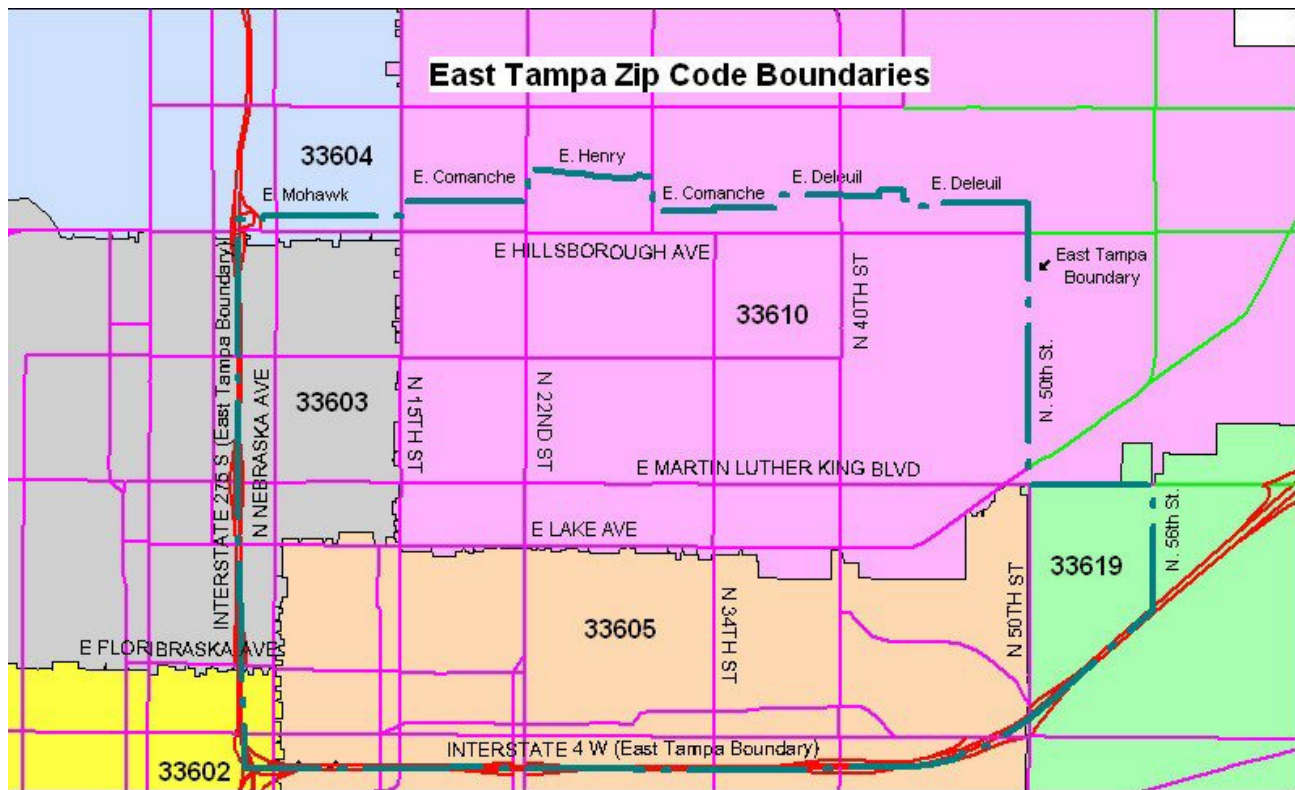
I’m not trying to get too much personal information from you. Just answer the questions you feel comfortable with. Are you ready? Okay then, lets start with your name and a good contact number in case they verify I was really here.

*******You proceed with the interview when you hear a baby crying in the background*******


You ask if they need to check on the baby. This will often make people relax and give you more information. Another opportunity just opened for you to inquire if they would like to participate in a focus group study.

EAST TAMPA GRID MAP





EMPLOYEE IDENTIFICATION BADGE

Employee Identification	
East Tampa Health, Education, and Social Services Committee	
GRIFFIN, EUGENE M.	
1910 E. Hillsborough Ave. Tampa, FL 33610	

EAST TAMPA NEEDS ASSESSMENT SURVEY – 2008
CONTROL LOG

Section I - Interviewer

Batch 01 - 20	Assigned Survey Numbers	Date Accepted Surveys	Assigned Grid Number(s)
	1 - 20	2/01/08	83

I acknowledge receipt of the above numbered surveys and agree to return the completed surveys no later than one week from date of assignment. If I am unable to complete the surveys in the time given, I understand I must contact my Program Coordinator and request additional time. I also understand that I am not allowed to work outside of my assigned grid and that I will not be given additional surveys until I have turned in satisfactorily completed surveys to my Program Coordinator. Failure to comply with the established guidelines may result in my termination.

Interviewer's Name _____ Signature _____

Section II – Program Coordinator/Training Coordinator

Batch 01 - 20	Completed Survey Numbers	Date Accepted Surveys	Assigned Grid Number(s)
	1 – 12, 14-20 #13 Vacant	2/09/08	83

I confirm the surveys listed have been satisfactorily completed and that I am required to forward the surveys to the Program Director at least twice a week. I also attest that I have exhausted all efforts to clear the assigned grid in an effort to reduce duplication of services. I understand that the director must approve grid assignments and that **only** the director may authorize concurrent grid assignments. Failure to comply with the established guidelines may result in my termination.

Program Coordinator's Name _____ Signature _____

Section II – Certification

Privacy Act Notice – All information given or provided will be treated in accordance with the Privacy Act of 1974. No information will be released except as authorized by the Act.

Program Director's Certification – I certify that I have reviewed the entries made and they appear to be consistent and accurate.

Subcommittee Chairperson's Certification – I certify that the information on this form is true and accurate to the best of my knowledge.

Signature

Date

Signature

Date

East Tampa Business & Civic Association, Inc.

Marc Hamburg, President flreamarc@aol.com

102 East Dr. Martin Luther King, Jr. Boulevard

Tampa, Florida 33603

North Boundary: E. Hillsborough Avenue

East Boundary: N. 40th Street - I4 to Ellicott/N. 50th Street - Ellicott to Hillsborough Avenue

South Boundary: I4

West Boundary: N. 15th Street

TPD Grid(s) 72, 73, 74, 84, 85, 86, 97, and 99

98 (divided by Lake Ave.)

Belmont Heights Estates (Phase I – III included)

Florence Villa/Beasley/Oak Park Civic Association

Valerie Washington, President valeriedasa@aol.com

3010 North 56th Street

Tampa, Florida 33619

North Boundary: E. 26th Avenue

East Boundary: N. 56th Street

South Boundary: E. Columbus Drive

West Boundary: N. 50th Street

Front Porch Florida Community

North Boundary: E. 26th Avenue

East Boundary: N. 22nd Street

South Boundary: E. 15th Avenue

West Boundary: N. 29th Street

TPD Grid(s) 108, 109, and 110

Grant Park Civic Association

Ralph Johnson, President Ralphj0103@yahoo.com

5703 30th Avenue

Tampa, Florida 33619

North Boundary: E. Martin Luther King, Jr. Boulevard

East Boundary: N. 56th Street

South Boundary: E. 26th Avenue

West Boundary: N. 50th Street

TPD Grid(s) 101

Highland Pines Community Task Force, Inc.

Betty Bell, President bellsystem5@yahoo.com

3003 Star Street

Tampa, Florida 33605

North Boundary: E. Lake Avenue

East Boundary: N. 50th Street

South Boundary: I4

West Boundary: N. 40th Street

TPD Grid(s) 100 and 111

Northeast Community Crimewatch & Civic Association, Inc.

Joel Barnum, President jbarnum@tampabay.rr.com

4008 East Henry Avenue

Tampa, Florida 33610

North Boundary: Hillsborough River

East Boundary: N. 43rd Street - Henry to 50th Street/N. 50th Street - Henry to Hillsborough Avenue

South Boundary: E. Hillsborough Avenue

West Boundary: N. 40th Street

Northview Hills Civic Association, Inc.

Frank Reddick, President far9155@aol.com

P.O. Box 310364

Tampa, Florida 33680

North Boundary: E. Ellicott Street

East Boundary: N. 50th Street

South Boundary: E. Chelsea Street

West Boundary: N. 40th Street

TPD Grid(s) 75 and 87

Old Seminole Heights Neighborhood Association, Inc.

Susan Long, President swlong29@verizon.net

921 E. Broad Street

Tampa, Florida 33604

www.oldseminoleheights.com

North Boundary: Hillsborough River

East Boundary: N. 22nd Street/Hillsborough River to Hillsborough Avenue/I275 - Hillsborough Avenue to MLK, Jr. Boulevard

South Boundary: W. Hillsborough Avenue - Hillsborough River to Florida/E. MLK, Jr. Boulevard - Florida to I275/E. Hillsborough Avenue –

West Boundary: W. Hillsborough Avenue - Hillsborough River to Florida Avenue/E. MLK, Jr. Boulevard – Florida Avenue to I275/E. Hillsborough Avenue

Southeast Seminole Heights Civic Association, Inc.

Sherry Genovar-Simons, President silversund@aol.com

911 East Shadowlawn Avenue

Tampa, Florida 33603

www.SESHCA.com

North Boundary: E. Hillsborough Avenue

East Boundary: N. 15th Street

South Boundary: E. MLK Jr., Boulevard

West Boundary: I275

TPD Grid(s) 70, 71 and 83

VM Ybor Neighborhood Association & Crimewatch

Christina Gesmundo, President christina.gesmundo@gmail.com

1309 E. 17th Avenue

Tampa, Florida 33605

North Boundary: E. 26th Street

East Boundary: N. 15th Street

South Boundary: I4

West Boundary: I275

TPD Grid 95 (partial), 96, and 107

East Tampa Initiative

University of South Florida (USF)

USF – City of Tampa- County
East Tampa Initiative
USF President and Mayor of Tampa

East Tampa Community Revitalization Partnership
(ETCRP)
Evageline Best
237-0601

Education and Social Service Committee
Dr. Maxine Woodside
249-6548 X223

Aesthetics & Beautification Committee
Denese Meteye-James

Economic Development Committee
Ernest Coney
248-9738

Housing Committee
Charles T. Dabney
247-5210

Land Use Committee
Carol Josephs-Marshall

Public Safety Committee
Rosa Cambridge



EAST TAMPA



APPENDIX 4:

EAST TAMPA MARKET ANALYSIS

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Appendix: Retail Trade Model

Summary of Conclusions & Recommendations

Lambert Advisory was engaged by URS Corporation (URS) to prepare a market study for the East Tampa CRA (ETCRA), with a primary focus to:

1. Identify the CRA's existing economic base;
2. Identify the market potential for future redevelopment within the CRA;
3. Assist in conceptualizing a market-based redevelopment strategy during both the short term (1 to 5 years) and long term (6 to 10 years) identifying strategic locations/nodes within the corridor that best serve a strategic vision; and,
4. Make additional recommendations and delineate next steps based on the baseline data collected.

This report includes our assessment of market conditions and trends impacting development and investment within the East Tampa CRA and surrounding market area (as defined within Section 1 of this study), as well as provide estimates of market potential for future development within the study area. Importantly, the market based conclusions, findings, and/or programmatic recommendations will be utilized as the basis for creating a strategic (financial) action plan completed within subsequent phases of the East Tampa CRA strategic redevelopment plan.

The summary herein provides an overview of the major conclusions and findings in the body of the report, and details our recommendations as to how the City, CRA, and URS, in conjunction with the resident and business community can promote revitalization within ETCRA and throughout the broader area.

The following three principal findings of our analysis and research drive our recommendations.

- ⇒ Existing market demand and growth for the foreseeable future is adequate to support an improved climate for the potential development of new for-sale and rental housing, as well as new office, industrial and retail space.
- ⇒ The City of Tampa and the East Tampa CRA needs to commit to a level of notable investment in utility services, streetscape, and corridor/transportation infrastructure improvements that serve as the foundation for the area's redevelopment although given the relative size of the CRA area, it is important to continue to make these improvements in specific market opportunity nodes in order to have a significant impact.
- ⇒ Despite recent investment and community involvement in improving the East Tampa CRA to date, there continue to be impediments to investment in the area; some based on perceptions of East Tampa, some financial in nature, and others principally requiring a refocus of existing resources. The CRA can play a role in mitigating a number of these impediments.

The remainder of this summary provides an overview of conclusions associated with the underlying market conditions and support for strategic redevelopment, as well as recommendations based on these findings and conclusions.

Principal Market Conclusions and Demand Estimates

- **Population Trends:** The population of the East Tampa CRA is nearly 31,000 in 11,000 households, which represents 8.9 percent of the City of Tampa population. While the CRA population grew more slowly than that of the broader region (e.g., 2.8 percent annual growth for the County and 1.9 percent annual growth for the City) over the last seven years, the stable 1.0 percent growth rate represents a recovery from its marked population loss (more than 11%) between the 1990 and 2000 Decennial Censuses. Further, CRA population growth is projected to slightly outpace growth in both the City and County over the next five years, adding roughly 1,900 persons and 700 households during the period.
- **Income Trends:** The current median household income in the CRA is approximately \$27,800, two-thirds of the City median of \$40,800. Median income is projected to increase approximately two percent annually through 2012. In 2000, more than a third of CRA households made less than \$15,000; that proportion is projected to a quarter of households by 2012. However, with a successful redevelopment effort, particularly targeting new residential development within the market area that is selling at price points that serve households at considerably higher income levels, the market area household income base should strengthen.
- **Residential (For-Sale):** Hillsborough County experienced one of the strongest housing booms in recent history. Within the new single family housing market, closing activity increased steadily from 6,114 units in 2001 to 7,606 units in 2005. More important, average sale prices increased from \$189,300 to \$301,400 during the period. Following this period of tremendous growth, the market has pulled back considerably in terms of volume with 5,476 closings in 2006; however, average pricing has remained robust at \$352,000. In spite of the region's recent housing boom, there has been limited new for-sale housing development within the ETCRA during the past several years. Though single family closings within East Tampa (and surrounding submarkets) increased from 62 units to 133 units from 2001 to 2006, this level of activity is marginal in terms of the area coverage. Moreover, in spite of single family average price increases from \$85,900 to \$166,800 during the period, it remains well below half that of the broader market.

In terms of resale activity within the ETCRA boundary, there has been a strong increase in sales volume and price during the past several years. Among the single family properties, the average re-sale price for the market area in 2006 was approximately \$139,000, or roughly \$125 per square foot. While this represents a 13.1 percent annual increase over single family re-sale value in 2000, existing home values in East Tampa remain well below that of the \$275,000± existing home sale price in the Tampa Bay region. As for multi-family (e.g., townhome, villa and condominium) resale activity, there has been limited activity within the CRA boundary. However, just to the south and north of the ETCRA, the market in

aggregate (including the two notable conversion properties), reported an average sale price of \$186,700 or \$187 per square foot.

Considering household growth projections, homeownership rates, current sales performance within the comparable/competitive market and potential impact of new development, we estimate net new demand for for-sale housing in East Tampa to be in the range of 450 to 600 units during the next five years, which includes approximately 87 for-sale units proposed within the market area (based upon information provided by the City's planning department as of October 2006). This would indicate an opportunity for the East Tampa CRA to capture slightly more than its "fair share" of household growth attributed to induced demand from the redevelopment initiative. However, we also conclude that price and demand sensitivities would require new home prices within most areas of the district to be at the entry level or slightly higher – a range of \$150,000 to \$225,000, depending on the product type.

- **Residential (Rental):** Overall, the rental apartment market in Hillsborough County is strong. As a result of rising land and construction costs, coupled with the inordinate amount of condominium conversion activity from 2003 to 2005, rental demand has outpaced supply. This is illustrated by the fact that occupancy levels in Hillsborough increased from the low 90 percent range in the early 2000's, to nearly 98 percent presently. Rental housing throughout the East Tampa CRA is generally characterized as small, older rental complexes. To that, the only new or sizable rental development in and around East Tampa has been largely bond-financed, income-restricted projects or otherwise affordable rental projects for seniors and low-income households. While the fundamental market for rental housing is strong in the broader region (Hillsborough County and more specifically central Hillsborough County) with average rental rates for newer, quality product in excess of \$1,000 per month and occupancies greater than 96 percent, average rental rates in central Hillsborough County are \$725, which is roughly 25 to 30 percent below the level that is considered to support new construction. Therefore, the same land and construction cost conditions that drive prices in the for-sale market essentially preclude the development of rental product in East Tampa.

While we believe there should be a strong push to promote homeownership within the East Tampa district, given population/household growth projections, there should still be demand for 250 to 350 traditional market rate rental units in the market during the next three to five years, which would include non-assisted senior housing communities. However, to support this level of demand, average rental rate cannot exceed \$900 per month, which is well below the rate to support new construction and is clearly the limiting factor in the area's ability to support new market development. Therefore, to support the development of rental housing, the City/CRA will need to provide "gap" funding assistance (which may be in the form of construction (subsidy) financing or land contribution).

- **Retail Market:** There is more 23 million square feet of shopping center retail space in Hillsborough County. The County added approximately 1.0 million square feet of new shopping center retail space between 2002 and 2006, or $\pm 250,000$ square feet per year on average during the period. The East Tampa CRA is situated in the

Central Tampa submarket, which also includes downtown Tampa, Ybor City, and areas north to Busch Boulevard. The total inventory of shopping center space in the submarket is estimated to be 1.63 million square feet (not including small stand-alone convenience and local stores less than 5,000 square feet). Of this total, ±442,000 square feet is in two entertainment specialty retail centers located in the Downtown/Channelside District and Ybor City. Though the Central Tampa submarket is reporting very low vacancy rates (in the range of 5 percent), average lease rates are among the lowest of all submarkets at \$13.50 per square foot, or roughly 20 percent below the County average of \$16.10 per square foot. In Central Tampa, the market absorbed 166,970 square feet of retail space between 2001 and 2006, equal to 33,400 square feet per year, on average over the five years.

The East Tampa CRA is estimated to comprise in the range of 400,000 to 450,000 square feet of total retail space. This includes the two only major shopping centers totaling nearly 300,000 square feet, as well as most small, local retail/convenience stores. Based upon the Lambert Advisory Retail Trade Model, the East Tampa CRA currently has demand for roughly 425,000 to 475,000 square feet of retail, which comprises most non-auto retail categories. Based upon these estimates of supply and demand, there appears to be a relative balance within the district retail market. However, in spite of this correlation, it is clearly evident that the East Tampa CRA is heavily supplied by lower-quality retail, the extent to which will make the retention of local demand and the attraction of outside retail increasingly difficult in the future. During the next 5 years, from population and income growth alone, there is projected to be an additional 55,000 to 75,000 square feet of net new retail demand in the East Tampa CRA – keeping all retention and inflow factors constant. However, through repositioning and/or improvement of existing retail supply within the area, the retention and “inflow” factors may be considerably enhanced, with an opportunity to capture 120,000 to 160,000 square feet of net new retail demand the next five year period.

We believe the retail component to the redevelopment effort in East Tampa is best served by at least exploring potential large and/or recognized regional and national tenants that may be encouraged to participate in the districts future growth. For this, a “retail” void analysis was completed to identify retail opportunities by showing where key retailers already are operating. In all, a principal opportunity in the East Tampa market is for additional stores catering to the immediate everyday needs of the populace, mainly supermarkets and pharmacies, along with thrift stores and discounters. Select corridors such as of 22nd Street, and sections of Hillsborough Boulevard may serve these uses well within either stand-alone facilities, mid-sized shopping centers, or part of a mixed use redevelopment program. One particular redevelopment strategy may be to build on existing commercial strips where fast food establishments are concentrated. Improved traffic and regional access can help such retailers to succeed while providing additional exposure to the community.

Given the size of the study area there may be several places for convenience retail. Thrift shops and dollar stores are important in these secondary retail nodes. These should adequately serve the study area and its immediate environs. Many of these shoppers will rely heavily upon them for staples (such as shampoo, towels, etc.).

Nationally recognized Thrift stores, which are not currently proximate to the market area, may be positioned to serve the community and surrounding areas.

Lastly, there should be an opportunity for many redevelopment programs within the area to serve as incubator locations for homegrown entrepreneurs. Many chains will be reluctant to enter the market (even though we increasingly see retailers at least talking about an "urban strategy"), but a healthy collection of independent stores operating at professional standards will garner attention.

In most cases, whether the redevelopment plan targets a national anchor, local operator, or combination thereof, the City will most likely be required to participate; either to entice the national operators with incentives and/or support the local retailers (which may be provided through development subsidy to provide for reduced rental rates). The extent to which the City is able to participate in the retail redevelopment effort will have a significant impact on the magnitude and quality of retail that may be introduced to the East Tampa CRA.

- **Office Market:** From a broader market perspective, the Hillsborough County office market, which comprises more than 30 million square feet of space, strengthened considerably during the past five years. Occupancy levels declined from a high of 19.5 percent in 2003 to a low of 10.5 in 2006, with a slight up-tick to 11 percent recorded in early 2007. Average lease rates increased from \$17.90 per square foot in 2002 to approximately \$20.50 currently. The East Tampa CRA is situated within the Central Tampa office submarket, which comprises a total 884,000 square feet, or roughly 3 percent of the regional market. Rental rates in the Central Tampa office submarket are currently \$16.31 per square foot (full service), which is the lowest of all submarkets and roughly 20 percent below that of the County's average rate. The lower rental rates in the Central Tampa submarket is largely attributed to two factors: most of the office buildings are less than 20,000 square feet, were built before 1990, and categorized as Class "B" or "C" quality product.

Based upon an analysis of office employment growth and demand capture estimates, the East Tampa CRA is estimated to demand between 60,000 to 100,000. However, as is the case with the rental housing market, solid demand does not immediately translate into the development of new office buildings, given trends in construction costs, land values, and the availability of suburban sites in and surrounding the East Tampa CRA (which allows for lower density/lower construction cost development of office space that is more financially viable given current gross rental rates in the market). While there is no compelling reason many local professional businesses that choose to locate in Central Tampa need to locate in the CRA, there is an opportunity to integrate professional office space within select redevelopment opportunities.

- **Industrial Market:** The Hillsborough County industrial market, which has a total of nearly 90 million square feet, improved steadily since 2002 with the absorption of 3.6 million square feet during the period. The market-wide vacancy rates declined to a historical low 3.7 percent with rate reaching \$6.10 per square foot. The East Tampa CRA is part of the East Tampa industrial submarket (as defined by a

combination of industrial market analysts), which comprises a fairly large geographic area with a total 21 million square feet. The market is experiencing vacancy of less than 4 percent, and lease rates of \$6.40 per square foot for warehouse space and \$11.00 per square foot (semi-gross) for flex space, both of which are slightly higher than the County overall. The East Tampa CRA is estimated to comprise approximately 1.0 million square feet of industrial space, with vacancy and rates comparable to its broader submarket.

Based upon economic and employment growth trends set forth above, we believe that industrial development growth and absorption within the East Tampa industrial market will remain solid during the next few years, in-line with historical trends. With that, East Tampa CRA should be in a position to capture some of this demand; suffice it to say, the district has a limited amount of sizeable parcels that could accommodate industrial development (or cluster) of critical mass. Nonetheless, we see an opportunity to build stand-alone industrial buildings within select smaller infill sites along the western fringes of the CRA (single or multi-tenant) in the range of 30,000 to 40,000 square feet located. Or, if a more aggressive redevelopment initiative to promote industrial development is undertaken (e.g., business relocation), the opportunity to build a small professional industrial park with up to 120,000 square feet may be warranted. The opportunity for industrial uses would most likely require a targeted industries initiative to attract a few larger businesses to anchor a specific program.

As summarized above and as detailed within the body of this report, Figure 1 below shows net new demand, by real estate use, in East Tampa in the near term (five years).

Figure 1: East Tampa CRA – Estimated Net New Demand by Use, Near Term (5 Years)

Real Estate Use	Net New Demand
Residential	
<i>For-Sale</i>	450 to 600 Units
<i>Rental</i>	250 to 350 Units
Total	700 to 950 Units
Office	60,000 to 100,000 sq.ft.
Retail	55,000 to 75,000 sq.ft.*
Industrial	
Total	30,000 to 120,000 sq.ft.

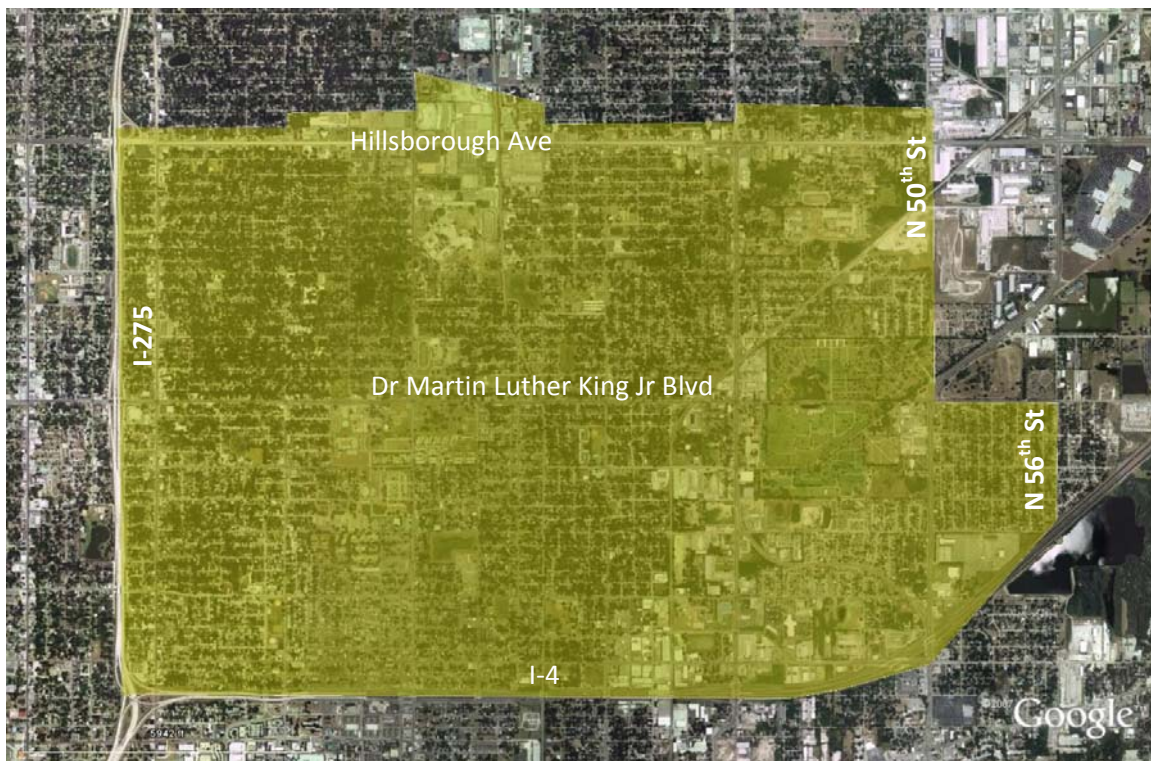
* Refer to summary narrative in Retail section above.

Section 1: Market Area Profile

Definition of Market Area

As the basis for evaluating the real estate market potential and redevelopment opportunities in East Tampa, Lambert Advisory (Lambert) examined demographic, economic, and real estate market trends and forecasts for several geographic areas (in descending order of geographic size): the Tampa Bay Region, Hillsborough County, City of Tampa, the East Tampa CRA, Zip Codes 33605 and 33610 (for residential resale statistics), and selected “competitive market” areas (for new housing, retail, office, and industrial statistics). The Tampa Bay Region and Hillsborough County are profiled to provide economic context for the narrower City of Tampa and East Tampa market and to discuss the CRA’s (and its corresponding market area) existing and potential “capture” of economic activity that occurs at the broader geographic levels – that is, for example, the proportion of industrial space in Hillsborough County that can be leased in buildings in East Tampa.

Figure 2: East Tampa CRA



Section 2: Demographic & Economic Profile

This demographic and economic profile focuses on those variables that “drive” demand for various real estate uses (e.g., housing, office), including population and household growth trends, household income growth, and employment trends and forecasts. For the purposes of this analysis, Lambert examined trends and forecasts for the East Tampa CRA, City of Tampa, Hillsborough County, and the Tampa Bay Region. The Tampa Bay Region consists of Pasco, Citrus, Hernando, Polk, Hillsborough, Pinellas, Manatee, and Sarasota counties.

The figures for 2000 reflect the US decennial Census data; 2007 and 2012 figures are based on population estimates and projections prepared by Hillsborough City-County Planning Commission. The Planning Commission publishes only population projections, so Claritas data is used to estimate the number of households, and for demographics such as age, race and income.

2A – Population & Households

As illustrated in Figure 2, the population of the East Tampa CRA is nearly 31,000 in 11,000 households, which represents 8.9 percent of the City of Tampa population. The County population is nearly 350,000 in 144,000 households. While the CRA population grew more slowly than that of the broader region over the last seven years, the stable 1.0 percent growth rate represents a recovery from its marked population loss (more than 11%) between the 1990 and 2000 Decennial Censuses. Further, CRA population growth is projected to slightly outpace growth in both the City and County over the next five years. The projections below indicate the addition of nearly 57,000 new Hillsborough County residents in 25,000 households through 2012. City of Tampa is projected to capture a third of those new households. This could have a number of positive implications for the East Tampa CRA, including enhanced demand for housing and retail space.

Figure 3: Population and Households, 2000-2012

Sources: Hillsborough City-County Planning Commission, Claritas, Lambert Advisory

	East Tampa CRA	City of Tampa	Hillsborough County
Population			
2000	28,768	303,447	998,948
2007	30,874	346,264	1,212,629
2012	32,789	362,045	1,269,586
Rate 00-07	1.0%	1.9%	2.8%
Rate 07-12	1.2%	0.9%	0.9%
Households			
2000	10,015	124,594	391,424
2007	10,857	143,621	479,974
2012	11,572	150,819	504,827
Rate 00-07	1.2%	2.1%	3.0%
Rate 07-12	1.3%	1.0%	1.0%

2B – Migration

In addition to natural increase (birth rate outpacing death rate), migration is a key driver of population growth. Migration is defined as population movement between Hillsborough County and other locations within and outside the United States. There are two components of net migration: in-migrants that move into Hillsborough and out-migrants who move to other counties, states, or countries.

More people make short-distance moves than long-distance ones, so it is not surprising that the highest numbers of in-migrants to Hillsborough County come from other Tampa Bay counties. Florida has historically attracted large numbers of migrants, particularly retirees, from Northeastern and Midwestern states. The west coast of Florida has historically attracted the highest numbers of in-migrants from Midwestern States, but in recent years, Northeastern states – especially New York, New Jersey, and Pennsylvania – have figured prominently in population growth due to migration.

Net migration accounted for the addition of more than 76,000 residents to the Tampa Bay Region in 2004, representing nearly a quarter of the state's migration. Domestic migration accounted for approximately 85 percent of this increase. Of the Tampa Bay counties, Pasco County had the largest number of domestic immigrants (nearly 20,500), accounting for 23.2 percent and 6.0 percent, respectively, of total migration to the Tampa Bay Region and Florida. Hillsborough County led the region in net international migration, accounting for more than 41 percent of the total.

Figure 4: Net Migration, 2004

Sources: Tampa Bay Partnership, Lambert Advisory

	Net Migration	% of FL's Total Net Migration
Hillsborough	18,335	6%
Tampa Bay Region	76,002	24%
Florida	310,571	100%

2C – Age

Lambert examined population by age cohort, which is a key barometer of demand for various retail uses and housing products, for the East Tampa CRA, City of Tampa, and Hillsborough County – illustrated in detail in Figure 4.

The current median age in East Tampa (33.2) is younger than that of both the City of Tampa (35.6) and Hillsborough County (36.2). Accordingly, although the age profile of East Tampa is very similar to that of the City and County, the 17 and under category represents a larger proportion (nearly a third) of the East Tampa CRA. The category represents a quarter of both the City and County populations. At all three geographic levels, the 65 and over cohort is the fastest growing; the category is projected to grow 2 percent annually in the CRA, nearly 3 percent annually in the City, and over 4 percent annually in the County. The second-fastest growing cohort for all three geographies is that of the 45 to 64 year-olds, the group in its peak earning years. The size and growth of these groups may indicate future demand for differentiated retail and housing products, which has implications for strategic redevelopment within the CRA.

Figure 5: Age in the CRA, City, and County, 2000-2012

Source: Claritas, Lambert Advisory

	East Tampa CRA	City of Tampa	Hillsborough County
Age (2000)			
17 and under	31%	25%	25%
18-44	35%	42%	41%
45-64	21%	21%	22%
Over 65	13%	13%	12%
Median Age	34.0	34.7	35.1
Age (2007)			
17 and under	30%	25%	25%
18-44	35%	39%	38%
45-64	23%	24%	25%
Over 65	13%	12%	12%
Median Age	33.2	35.6	36.2
Age (2012)			
17 and under	29%	24%	25%
18-44	35%	37%	36%
45-64	23%	26%	27%
Over 65	13%	12%	13%
Median Age	33.4	36.9	37.4
Projected Growth 07-12			
17 and under	0.3%	0.8%	1.4%
18-44	1.1%	0.3%	0.8%
45-64	1.3%	2.7%	3.1%
Over 65	2.0%	2.8%	4.2%

2D – Race

The racial composition of the East Tampa CRA varies widely from that of the broader City and County. Both the City and County have a higher proportion of non-Hispanic whites (45% and 58%, respectively) than the CRA (10%). The percentage of black/African-American residents (68%) in the CRA is nearly triple that of the City (26%) and more than 4.5 times that of the County (15%).

As shown in Figure 5, the population is projected to become increasingly diverse over the next five years. Generally, the presence and growth of diversity in the population indicate dynamic interests and demand for a wide range of services, which can encourage investment in the region.

Figure 6: Race in the CRA, City, and County, 2000-2012

Source: Claritas, Lambert Advisory

	East Tampa CRA	City of Tampa	Hillsborough County
Population by Single Race Classification (2000)			
White Alone	13%	51%	63%
Black or African American Alone	68%	25%	14%
Other, including two or more races	2%	4%	4%
Hispanic or Latino, of any race (2000)	16%	19%	18%
Population by Single Race Classification (2007)			
White Alone	10%	45%	58%
Black or African American Alone	68%	26%	15%
Other, including two or more races	2%	6%	5%
Hispanic or Latino, of any race (2007)	19%	23%	22%
Population by Single Race Classification (2012)			
White Alone	8%	41%	53%
Black or African American Alone	67%	27%	16%
Other, including two or more races	3%	7%	6%
Hispanic or Latino, of any race (2012)	22%	25%	25%
Projected Growth 07-12			
White Alone	-3.6%	-0.7%	0.2%
Black or African American Alone	0.9%	1.8%	2.9%
Other, including two or more races	3.3%	4.7%	5.0%
Hispanic or Latino, of any race	3.3%	3.7%	4.8%

2E – Household Incomes

As part of our demographic and economic profile, Lambert analyzed household income, which represents a critical element of retail and housing demand, as it indicates the amount and nature of expenditure potential in a given market. The current median household income in the CRA is approximately \$27,800, two-thirds of the City median of \$40,800. As shown in Figure 6, that median will increase approximately two percent annually through 2012. Substantial growth is projected in the higher income cohorts at all three geographies: in 2000, only 20 percent of households county-wide had incomes in excess of \$75,000; by 2012, a third of all households will fall into that category. In 2000, more than a third of CRA households made less than \$15,000; that proportion is projected to a quarter of households by 2012.

Figure 7: Household Income in the East Tampa CRA, 2000-2012

Source: Claritas, Lambert Advisory

	East Tampa CRA	City of Tampa	Hillsborough County
Household Income (2000)			
Less than \$15,000	34%	21%	15%
\$15,000 to \$24,999	20%	15%	13%
\$25,000 to \$34,999	15%	14%	14%
\$35,000-\$49,999	15%	16%	17%
\$50,000-\$74,999	9%	16%	19%
\$75,000-\$99,999	4%	7%	9%
\$100,000-\$149,999	2%	5%	7%
\$150,000 or more	1%	5%	4%
Median	\$22,802	\$34,538	\$41,309
Household Income (2007)			
Less than \$15,000	28%	18%	12%
\$15,000 to \$24,999	18%	13%	11%
\$25,000 to \$34,999	15%	13%	12%
\$35,000-\$49,999	17%	16%	17%
\$50,000-\$74,999	13%	17%	20%
\$75,000-\$99,999	5%	9%	11%
\$100,000-\$149,999	4%	8%	11%
\$150,000 or more	2%	6%	6%
Median	\$27,887	\$40,800	\$48,159
Household Income (2012)			
Less than \$15,000	26%	16%	11%
\$15,000 to \$24,999	17%	12%	10%
\$25,000 to \$34,999	14%	12%	11%
\$35,000-\$49,999	16%	16%	16%
\$50,000-\$74,999	15%	17%	20%
\$75,000-\$99,999	5%	10%	12%
\$100,000-\$149,999	5%	9%	13%
\$150,000 or more	2%	8%	8%
Median	\$30,281	\$44,438	\$53,288

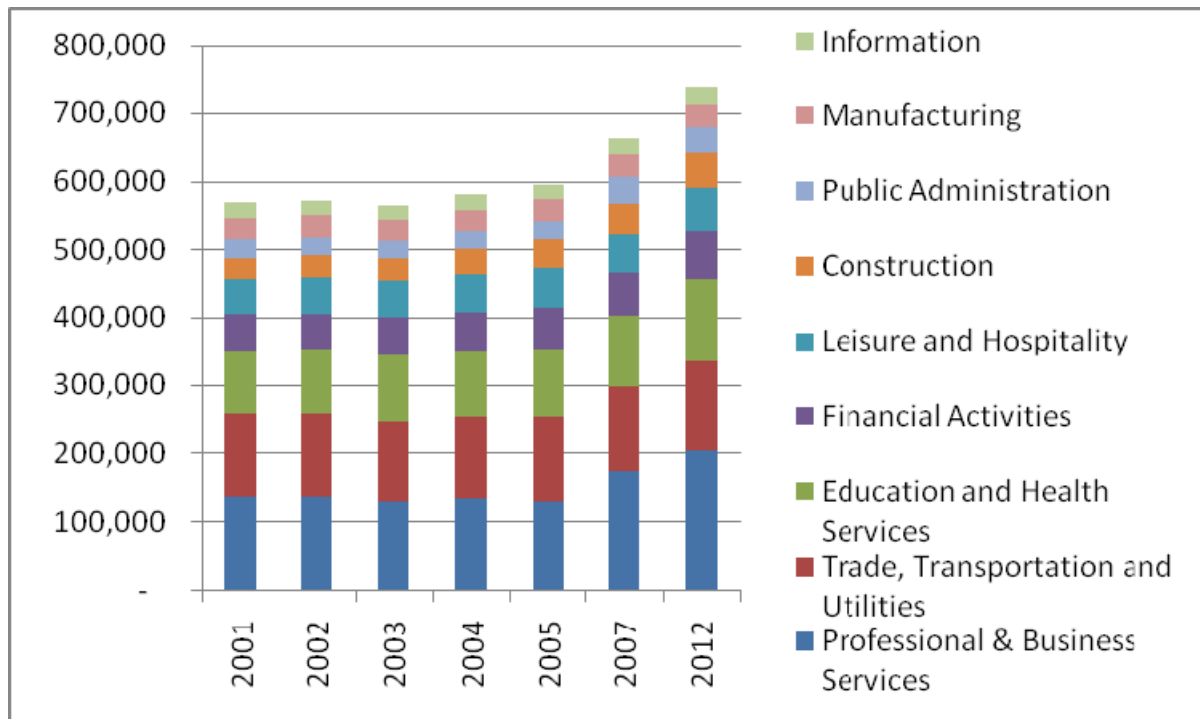
2F – Employment and Wages

Employment growth is a major driver of demand for real estate, including office, industrial, and residential uses. As illustrated in Figure 7, Hillsborough County added more than 97,000 jobs over the last five years. The workforce consists of nearly 700,000 persons, 87 percent of whom are employed in services-providing (versus goods-producing) industries. The proportion of services-providing jobs has gradually decreased each of the last five years due to the extremely high growth rate (9% per annum) of the construction industry.

Other than the growth in Construction, the strongest growth has occurred in the Other Services (which includes industrial and household repair and maintenance services, personal care services, and laundry and dry cleaning services) and Leisure and Hospitality sectors. The Professional and Business Services sector is the largest industry in the region, accounting for more than a quarter of all jobs (175,000). Over the 2007-2012 period, the highest growth rate is projected in the Professional and Business Services sector. Employment for the nine largest industries is shown in Figure 6.

Figure 8: Hillsborough County Employment, 2001-2012, Selected Industries

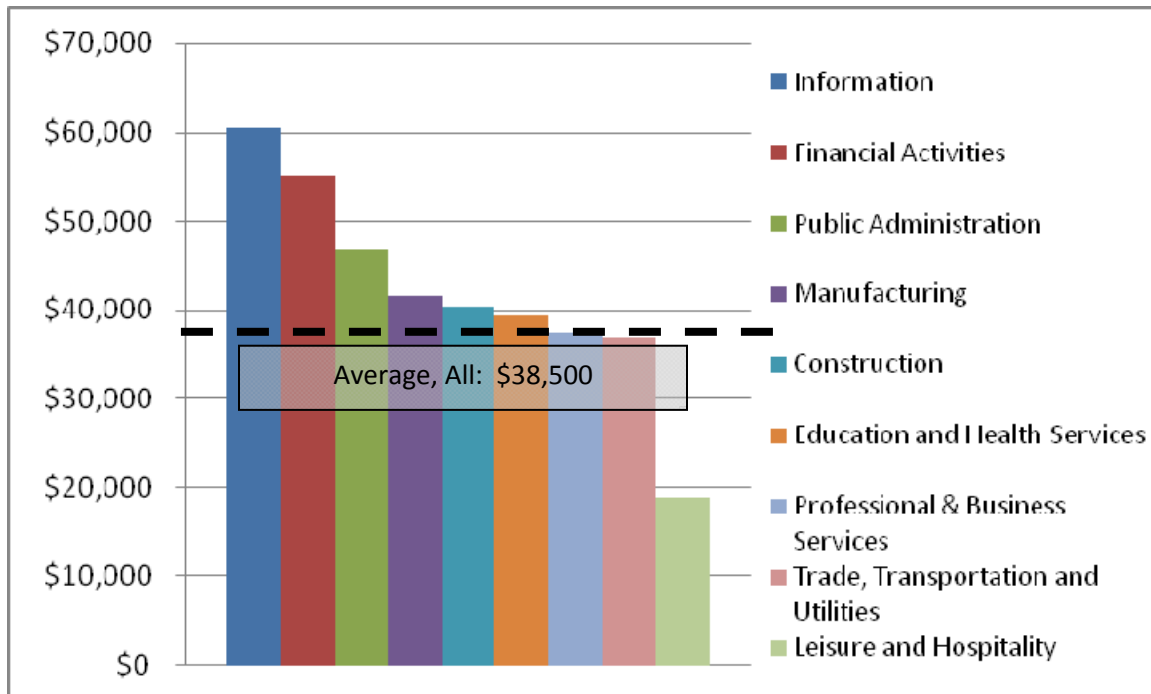
Source: Florida Agency for Workforce Innovation, Occupational Employment Projections Unit, Lambert Advisory



The most recent wage data available (charted in Figure 8) shows the average across all industries at \$38,500. The highest paying industries in Hillsborough County are Information (\$61,000), Financial Activities (\$55,000), and Public Administration (\$47,000).

Figure 9: Hillsborough County Wages by Industry, 2005

Source: Florida Agency for Workforce Innovation, ES-202 Data, Lambert Advisory



Section 3: Residential Market

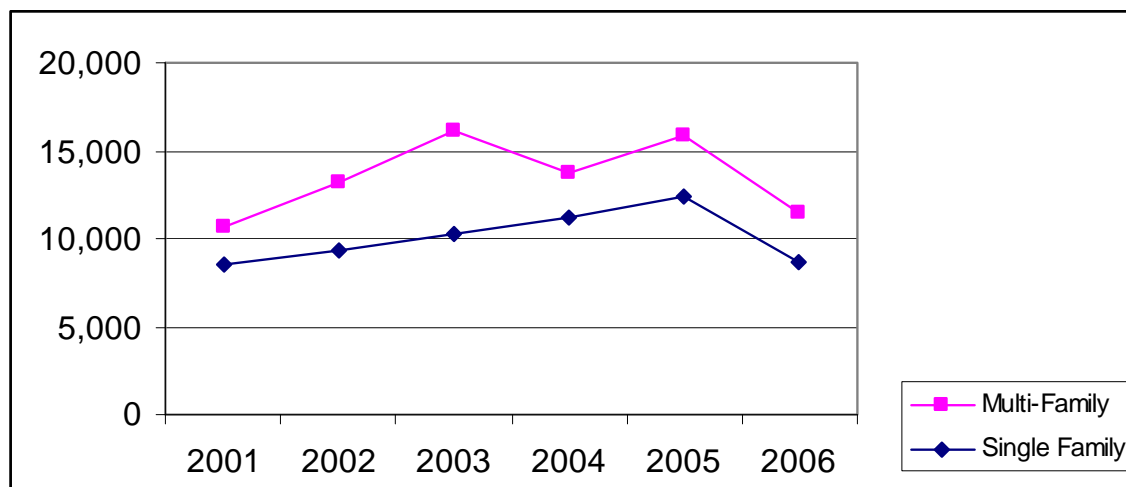
A key element to the redevelopment effort and economic improvement of the East Tampa CRA will be derived from the introduction of new housing to the market. This includes both for-sale and rental housing. Presently, the City of Tampa's housing inventory is made up of approximately 56 percent homeownership (owner-occupied) units and 44 percent rental units. This varies somewhat from the State's homeownership/rental mix which has a homeownership rate closer to 68 percent homeownership, with rental units at 32 percent.¹ Nonetheless, we believe opportunities for both homeownership and rental housing development will be instrumental in the redevelopment of East Tampa CRA, perhaps with a stepped-up effort to increase homeownership. In order to understand the potential demand and impact that housing (for-sale and rental) may have on East Tampa's redevelopment effort, Lambert Advisory completed a residential supply and demand analysis, including an assessment of new homes sale trends, re-sales and competitive rental housing activity in the local area and surrounding market.

3A – For-Sale and Rental Housing Permit Activity

The meteoric growth of the housing market in Hillsborough County is well documented. Hillsborough has had record setting years in housing starts (permits), closings and price increases almost every year since 2001. The chart below shows trends in the number of residential building permits issued annually in Hillsborough County between 2000 and 2006.

Figure 10: Hillsborough County Residential Building Permits Issued, 2001-2006

Source: Hillsborough County, Lambert Advisory



¹ US Census Bureau

From 2001 to 2005, single family residential permit activity in Hillsborough County increased steadily from 8,477 units to 12,450. By year-end 2006, however, the number of single family permits issued in the County declined by 31 percent from the prior year to 8,639.

The number of new single family permits issued annually in the East Tampa area since 2001 is more sporadic, reflecting the availability of in-fill/tear-down lots in any given year. As illustrated in the table below, there were 114 single family permits issued in the East Tampa area in 2001, with this number declining to 100 in 2002, 63 in 2003, and 43 in 2004. By 2005, the number of single family permits increased to 79 and then registered the highest number issued over the reporting period at 135 in 2006.

The number of multi-family permits issued in Hillsborough County between 2000 and 2006 fluctuates from a high of 5,856 (in 2003) to a low of 2,144 (in 2001). The fluctuation in multifamily permit activity is partly attributed to spikes in higher density for-sale and rental housing development as opposed to lower density townhome development, which has been a popular housing product during the past two to three years.

Figure 11: East Tampa Market Area Residential Building Permits Issued, 2001-2006

Source: Hillsborough County, Lambert Advisory

Year	Single Family Detached			Single Family Attached (1)			Apartments			Total		
	Permits	Tear Downs	Total	Permits	Tear Downs	Total	Permits	Tear Downs	Total	Permits	Tear Downs	Total
2001	114	(13)	101	24	(2)	22	44	(906)	(862)	182	(921)	(739)
2002	100	(6)	94	6	(4)	2	0	(8)	(8)	106	(18)	88
2003	63	(35)	28	124	0	124	84	0	84	271	(35)	236
2004	43	(5)	38	280	0	280	100	0	100	423	(5)	418
2005	79	(5)	74	26	(2)	24	0	0	0	105	(7)	98
2006	135	(3)	132	75	(2)	73	244	0	244	454	(5)	449

(1) Includes Duplexes, Townhomes, Condominiums

The East Tampa area has also had a significant number of multi-family permits issued for townhomes and condominiums since 2001. However, the overwhelming majority of these permits have been issued for projects in Ybor City south of I-4. Based on the number of permits issued vis-à-vis "tear-downs," East Tampa has had a net loss of (442 rental apartment units since 2001).

3B – New Housing Market Profile

The Hillsborough County market closed 6,114 new single family homes in 2001 at an average price of \$189,935. By year-end 2005 the number of new homes closed increased to 7,606 with the average price skyrocketing 59 percent to \$301,420.

In spite of this tremendous growth, the fourth quarter of 2005 marked the end of the real estate boom for the Tampa Bay Region and Hillsborough County. Due to considerable market momentum and lag time, the magnitude of the current slowdown was not fully reflected in permits and closings until the second half of 2006.

By year-end 2006 the market had closed 5,472 new single family homes, down 28 percent from 2005. However, and again as a result of momentum and lag time, the average price of a new single family home at year-end 2006 increased by 17 percent to \$352,333. A significant number of these closings were for sales made in 2005. Thus, many of the new builders we contacted indicated new home sales are down by 30 to 40 percent in the second half of 2006 compared to the same time period in 2005.

In the East Tampa area, new single family home closings are generally limited to in-fill housing on single lots or a group of lots. Many of the homes in East Tampa and the surrounding neighborhood areas (Belmont Heights, Jackson Heights, Grant Park, Seminole Heights, and Ybor City) are built as “affordable” or “workforce” units and priced well below (typically \$100,000 to \$150,000 under) the market average for the county. Active builders in the area include New Millennial Homes, American Housing Corp., Accent Development, and Ybor City Homes.

A profile of new single family home sales in East Tampa and surrounding neighborhoods shows an average price of \$85,970 in 2001, with annual increases of 8 percent to \$93,200 in 2002, and 6 percent to \$98,550 in 2003. In the 2004 to 2006 period, it appears the same factors impacting the new home market in the broader Hillsborough County had a similar impact in East Tampa. Thus, increasing land and construction costs, coupled with an investor and speculative buying frenzy driven largely by a favorable capital/lending environment, drove home prices in East Tampa up by an average of nearly 20 percent a year for the three-year period 2004 to 2006. As of year-end 2006 the average price of a new single family home in East Tampa was estimated at \$166,980 – a price that still is less than half that of the broader market.

The following table displays the number of new home closings and average prices for Hillsborough County and the East Tampa area, between 2001 and 2006.

Figure 12: Hillsborough County and East Tampa Residential Closings and Prices, 2001-2005

Source: Rose Residential; Lambert Advisory

	2001	2002	2003	2004	2005	2006
Single Family Closings						
Hillsborough	6,114	6,331	7,573	7,419	7,606	5,472
East Tampa (1)	62	46	103	108	129	133
Single Family Average Price						
Hillsborough	\$189,935	\$199,052	\$211,396	\$246,200	\$301,420	\$352,333
East Tampa (1)	\$85,970	\$93,200	\$98,550	\$114,280	\$136,630	\$166,890
Multi-family Closings						
Hillsborough	1,554	1,691	1,696	2,558	6,237	8,260
East Tampa (2)	42	38	63	98	187	124
Multi-family Average Price						
Hillsborough	\$161,466	\$164,100	\$162,100	\$169,640	\$197,250	\$193,742
East Tampa (2)	\$96,000	\$96,670	\$107,950	\$136,380	\$159,960	\$193,300

(1) Include East Tampa and Surrounding Neighborhoods (e.g., Belmont/Jackson Heights and Grant Park to the east, Portions of Seminole Heights to the north and west, and YBOR City south of I-4 to the south)

(2) Multi-family closings were mostly limited to Ybor City south of I-4, and included new construction townhomes and condominiums as well as condo conversions.

Multi-family home closings, including townhomes and condominiums, in Hillsborough County have historically averaged between $\pm 1,500$ and $\pm 1,700$ units per year. In 2004, the number of new multi-family home closings jumped 51 percent to 2,558 units, before more than doubling to 6,237 units in 2005. The number of multi-family closings jumped another 32 percent to 8,260 in 2006. The rise in new condominium closings over the past three years is largely attributable to the extraordinary number of condominium conversions in Hillsborough County, estimated at 15,000 since 2003. The surge in condominium conversions in the county not only affected the number of new condominium closings in the county over the past several years, it also had the impact of lowering the average price of new condominium units, since condominium conversion units typically range between \$100,000 and \$200,000, compared to a range of \$300,000 to over \$1.0 million for new construction condominiums, most of which have been or are being built along the Bayshore or the downtown Tampa/Channelside District.

The condo conversion craze was not as evident in the East Tampa CRA market area, although there is a ± 450 unit condo conversion project immediately south of I-4 at East Palm Avenue in Ybor City – the Quarters at Ybor is closed 282 units in 2005 and 2006, combined, at an average price of \$183,130. Approximately 80 percent of the buyers at the Quarters have reportedly been investors.

Other than the Quarters at Ybor, new multi-family home sales have almost exclusively been for small new construction projects south of I-4. Two exceptions include a six-unit townhome project under construction on the north side of Columbus Drive at Owen Street. The project is being built by Chase Dream Homes and marketed by Pantheon Real Estate. Reportedly five of the six units have sold (but not closed) at an average price of \$260,000 (\$160/sq. ft.) for 1,620 square feet of living area. Additionally, Ybor

City Homes is planning a 10-unit condominium project on the NE corner of 15th Avenue and 16th Street, one block south of Columbus Drive. The 10-unit project will feature one- and two-bedroom floor plans ranging between 700 and 1,000 square feet and priced from ±\$160,000 (±\$229/sq. ft.) to ±\$200,000 (±\$200/sq. ft.).

The table below provides a summary of unit size and pricing characteristics for several new multi-family projects in East Tampa and south of I-4 in Ybor City.

Figure 13: East Tampa Market Area – Comparable/Competitive Housing Profile

Source: Rose Residential; Lambert Advisory

Name of Project	Number of Units	Location	Unit Sizes- Range (Sq. Ft. of Living Area)	Range of Average Base Price	Range of Average Base Price/Sq. Ft.	Absorption	Comments
Townhomes							
Citilofts/Townhomes of Ybor	12	1400 Block of East 4th Avenue, Ybor City	1,298-1,676	\$181,300-\$298,000	\$140-\$179	±2 units/month	Sold-out
Citilofts Fifth Avenue Townhomes	6	1500 Block of East 5th Avenue, Ybor City	1,768	\$263,100-\$302,800	\$149-\$171	±3 units/month	Pre-construction prices at \$205,000 equal to \$116/sq.ft.
Columbus Drive Townhomes	6-UC	Columbus Drive & Owens Street, East Tampa	1,620	\$260,000	\$160	±1 unit/month	Units UC, no closings to date
Condominiums							
Quarter at Ybor (condo conversion)	454	East Palm Ave, just south of I-4, YborCity	635-1,146	\$154,000-\$245,000+	\$214-\$243	±12 units/month	Have sold less than 3 units per month in 2007. 80% of buyers are investors
Ybor Village Lofts	N/A	1900 Block of East 5th Avenue, Ybor City	903-1,369	\$155,000-\$249,9000	\$172-\$183	±2 units/month	Over 50% investors
15th Ave. Condos	10-PC	NE Corner of 15th Ave. and 16th Street, 1 block south of Columbus, East	700-1,000	\$160,000-\$200,000	\$200-\$228	Planned	-

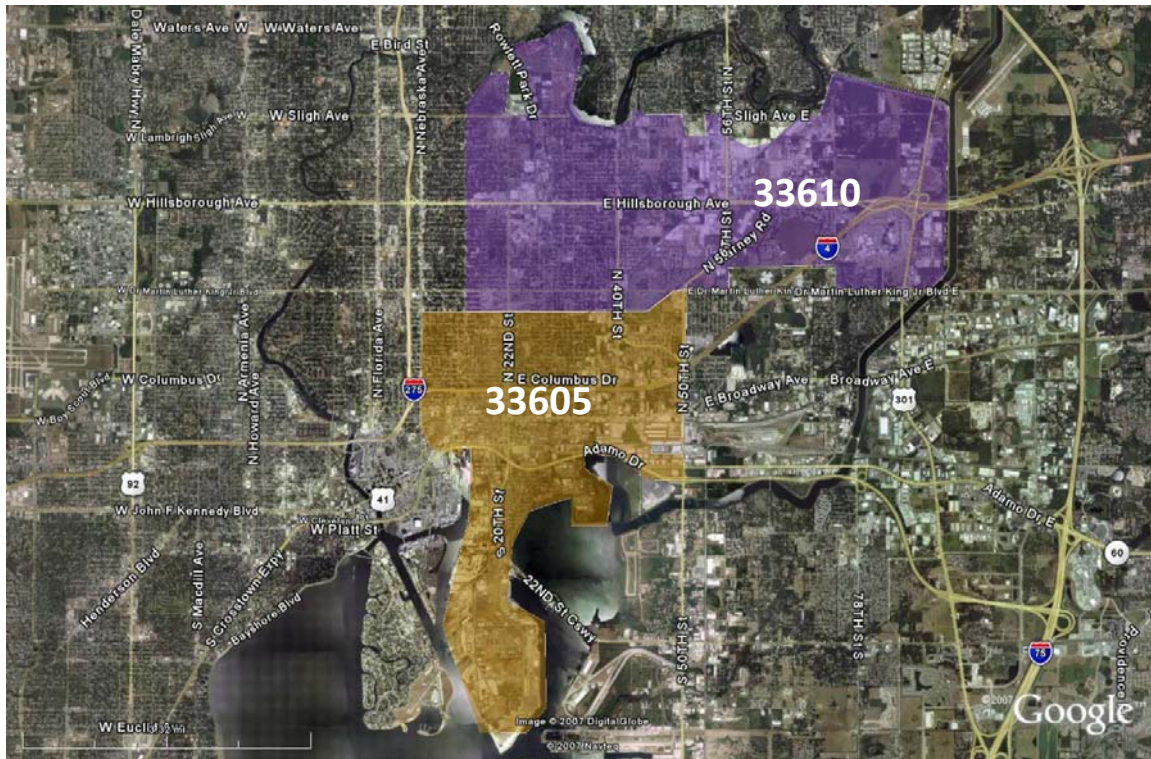
UC- Under Construction

PC- Planned Construction

3C – Residential Re-Sale Market

This “snapshot” profile of single family and condominium re-sale activity provides an understanding of existing residential housing trends impacting the local market. The Residential Market Area (RMA) is comprised of two Zip Codes (33605 and 33610), and is outlined in the map below.

Figure 14: East Tampa CRA – Residential Resale Profile - Zip Code Map



As illustrated above, the two specified Zip Codes encompass areas outside the CRA boundaries. This is due in part to the fact that data utilized to analyze housing resale trends (purchased through a third-party service that accesses data directly from Hillsborough County public records), is provided by Zip Code and extrapolating individual home sales that fit within the CRA boundaries is extremely difficult given the volume of data. Nonetheless, the Zip Codes collectively comprise roughly 75± percent of the East Tampa CRA area and are determined to provide adequate representation of home resale activity within the East Tampa CRA.

As summarized in Figure 14 below, there were 10 total single family re-sales recorded within the RMA in the fourth quarter (Q4) of 1994. In Q4 2000, the resale volume increased to approximately 133 total single family re-sales, and increased to 245 re-sales in Q4 2006.

Figure 15: East Tampa CRA - RMA Single Family Resale Profile
Fourth Quarter 1994, 2000 & 2006

Source: DataQuick; Lambert Advisory

	RMA		
	1994	2000	2006
Single Family			
Number of Sales	10	133	245
Average Sale Price ¹	\$32,429	\$66,512	\$138,890
Average Price/Sq.Ft.	\$28.50	\$54.70	\$125.58
% Ann. Growth			
Average Sale Price		12.7%	13.1%
Average Price/Sq.Ft.		11.5%	14.9%

Among the single family properties, the average re-sale price for the market area in 2006 was approximately \$139,000, or roughly \$125 per square foot. While this represents a 13.1 percent annual increase over single family re-sale value in 2000, existing home values in East Tampa remain well below that of the \$275,000± existing home sale price in the Tampa Bay region.

In 1994 and 2000, there were virtually no multi-family condominium sales recorded within the RMA. However, in 2006, there were approximately 56 sales recorded in the fourth quarter, slightly less than half of which were in two developments, located on Ashburn Lake Drive and Palm Drive. Both developments were built in 2005, just outside the actual East Tampa CRA boundary. These developments reported sales as shown in Figure 15, which also includes a summary of all other condominium sales in the market area.

Figure 16: Condominium Profile, 2006

Source: DataQuick; Lambert Advisory

Location	Avg. Size (SF)	Avg. Sale Price	Avg. Sale/SF
Ashford Lake Drive	N/A	\$169,700	N/A
Palm Avenue	875 SF	\$211,100	\$240
Avg. All Other Properties	N/A	\$190,500	N/A
All Condominium Units	996 SF	\$186,700	\$187

As indicated above, Palm Avenue represents the highest priced condominium product in the market at \$211,100, with sales generally ranging from \$146,000 to \$273,000. The market in aggregate, including the two featured properties along with all other sales, reported an average sale price of \$186,700 or \$187 per square foot. The analysis clearly indicates a relatively tight range of pricing for multi-family product in this market.

3D – Summary of Findings & Estimate of For-Sale Demand

As highlighted in the demographic analysis in Section 2 above, the East Tampa CRA is expected to add roughly 1,900 residents, or 700± households, from 2007 to 2012. Though the City (and presumably the East Tampa CRA) has a fairly balanced mix of homeownership and rental housing, we believe that a slightly stronger effort to

encourage homeownership will be important to the redevelopment process. This would indicate that roughly 65 percent of the estimated new housing demand in East Tampa will be homeownership (for-sale) product.

There are a number of potential sites within the East Tampa CRA that could accommodate new for-sale housing development. While it is evident that there is market demand potential for either single or multi-family product, we believe a primary focus of new housing development should be multi-family product, which would allow for development of critical mass. Multi-family product would include attached townhomes/villas and condominium flats, either in the way of four-plex carriage homes or mid-rise condominiums.

In an effort to maximize redevelopment of various sites, the opportunity to build low-to-mid-density product (assumed to be 4 to 8 units per acre) is recommended. While low-to very low-density development (namely single family product) is compatible with the surrounding market, and demand for new single family homes exists, most of the potential (existing) site's do not allow for (or promote) a development of critical mass. Furthermore, it is increasingly difficult to off-set high land acquisition and improvement cost with low-density development. Conversely, the market demand for mid- to higher-density condominium product (20+ units per acre) in this location is marginal – the vast majority of non-water (or infill) for-sale development within the market is low-density housing (either single family, townhome or carriage house).

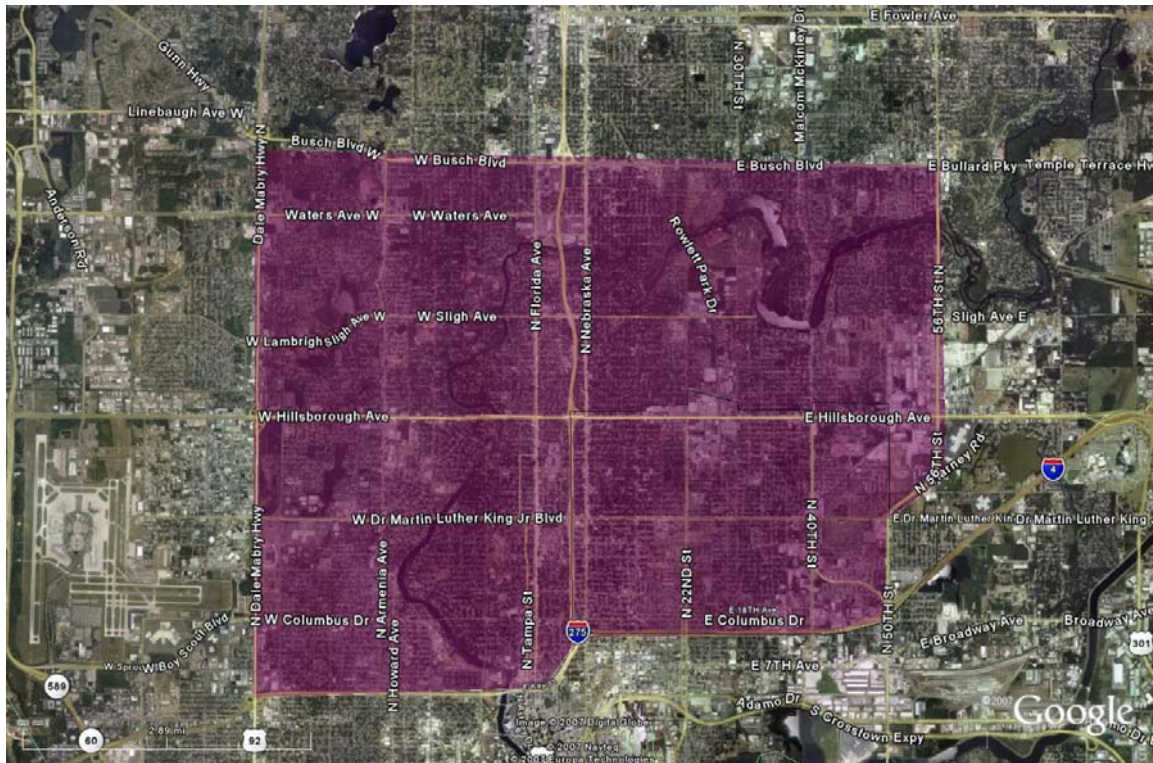
Considering household growth projections, homeownership rates, current sales performance within the comparable/competitive market, and potential impact of new development, we estimate net new demand for for-sale housing in East Tampa to be in the range of 450 to 600 units during the next five years, which includes approximately 87 for-sale units proposed within the market area (based upon information provided by the City's planning department as of October 2006). This would indicate an opportunity for the East Tampa CRA to capture slightly more than its "fair share" of household growth attributed to induced demand from the redevelopment initiative. However, we also conclude that price and demand sensitivities would require new home prices within most areas of the district to be at the entry level or slightly higher – a range of \$150,000 to \$225,000, depending on the product type. This pricing would most likely require land to be contributed at a marginal value, given current construction costs.

3E – Rental Apartment Market

Overall, the rental apartment market in Hillsborough County is strong. As a result of rising land and construction costs, coupled with the inordinate amount of condominium conversion activity from 2003 to 2005, rental demand has considerably outpaced supply. This is illustrated by the fact that occupancy levels in Hillsborough increased from the low 90 percent range in the early 2000's, to nearly 98 percent presently. Accordingly, rents have increased by three to five percent on average over the past several years and industry professionals indicate this trend should continue during the next 12 to 24 months.

The relatively tight rental market conditions within the broader market generally apply to the Central Hillsborough submarket, within which the East Tampa CRA falls.

Figure 17: Central Hillsborough Submarket



Though the Central submarket has not been a target for condominium conversions, the market is registering a low 2.5 percent vacancy. However, the bulk of rental development in and around East Tampa is dominated by bond-financed, income-restricted projects or otherwise affordable rental projects for seniors and low-income households.

Figure 18: Apartment Market Profile, Hillsborough County and Central Hillsborough Submarket

Source: Bay Area Apartment Assoc.; Lambert Advisory

Market Area	Number of Rental Communities	Total Number of units	Avg.Size (Sq.Ft.Living Area)	Avg. Rent	Avg. Rent/ Sq.Ft.	Occupancy
Hillsborough County	393	91,769	935	\$855	\$0.91	97.2%
East Tampa (and Surrounding Neighborhoods)	56	12,158	826	\$718	\$0.87	97.6%
Units Built after 1990						
Hillsborough County	116	27,246	1,076	\$1,050	\$0.98	97.0%
East Tampa (and Surrounding Neighborhoods)	3	604	904	\$683	\$0.76	98.6%
Units Built before 1990						
Hillsborough County	277	64,523	862	\$760	\$0.88	97.3%
East Tampa (and Surrounding Neighborhoods)	53	11,554	812	\$726	\$0.89	97.6%

The table above shows inventory, vacancy rates, average unit size and rent for Hillsborough County and the Central Hillsborough submarket. This includes a summary of rental inventory for units built prior to and after 1990. While occupancy in the Central submarket matches that of the broader region, average rental rates are more than 15 percent lower. Moreover, in stark contrast to the broader Hillsborough market, average rental rates for developments built prior to 1990 in the Central submarket are considerably lower than rental rates in new (post-1990) development. This is largely attributed to the relative high concentration of affordable rental housing communities in the area.

As a matter of fact, two of the newest rental apartment projects in Hillsborough County are located in the East Tampa submarket. Both are bond-financed developments with income restrictions at 60 percent of median household income. One of the projects, Meridian Point, located at 2450 East Hillsborough, was developed in 2005. The project consists of 360 units and is reportedly over 90 percent leased. Around the corner and south of Meridian Pointe at 5029 N. 40th Street is Brandywine, a bond-financed development that is under construction and will offer one-, two-, three-, and four-bedroom units. Unit sizes and rental rates have not yet been made available.

Following is a summary of average unit sizes, rates, and occupancy by unit type in the Central Hillsborough County submarket. A summary of comparable/competitive rental developments in the East Tampa CRA (and surrounding market area) is included as an attachment.

Figure 19: East Tampa Apartment Market Profile – By Unit Type

Source: Rose Residential Reports, Lambert Advisory

Unit Class	Number of Units (1)	Avg. Size (Sq.Ft. Living Area)	Avg. Rent	Avg. Rent/ Sq.Ft.	Occupancy
Efficiency	702	435	\$550	\$1.26	95.9%
1 Bdr/1Bath	4,752	666	\$646	\$0.97	98.3%
2 Bdr/1, 1.5 Bath	1,634	900	\$716	\$0.80	97.8%
2 Bdr/2 Bath	2,130	1,006	\$838	\$0.83	96.5%
3 Bdr/2 Bath	392	1,284	\$916	\$0.71	95.0%
Four BDR	52	1,451	\$1,032	\$0.71	100.0%
All Units	9,662	826	\$718	\$0.87	97.7%

(1) Only includes communities reporting unit mix

3F – Estimate of Rental Demand

The East Tampa CRA has a number of potential sites for rental development. Though there is a need to focus intently on homeownership within the district, given population/household growth projections, rental housing demand in this market is estimated to be in the range of 250 to 350 units for traditional market rate rental housing during the next three to five years, which would include non-assisted senior housing communities. However, to support this level of demand, average rental rate cannot exceed \$950 per month, which is well below the rate to support new construction and is clearly the limiting factor in the area's ability to support new market development. Therefore, to support the development of rental housing, the City/CRA will need to provide "gap" funding assistance (which may be in the form of construction (subsidy) financing or land contribution).

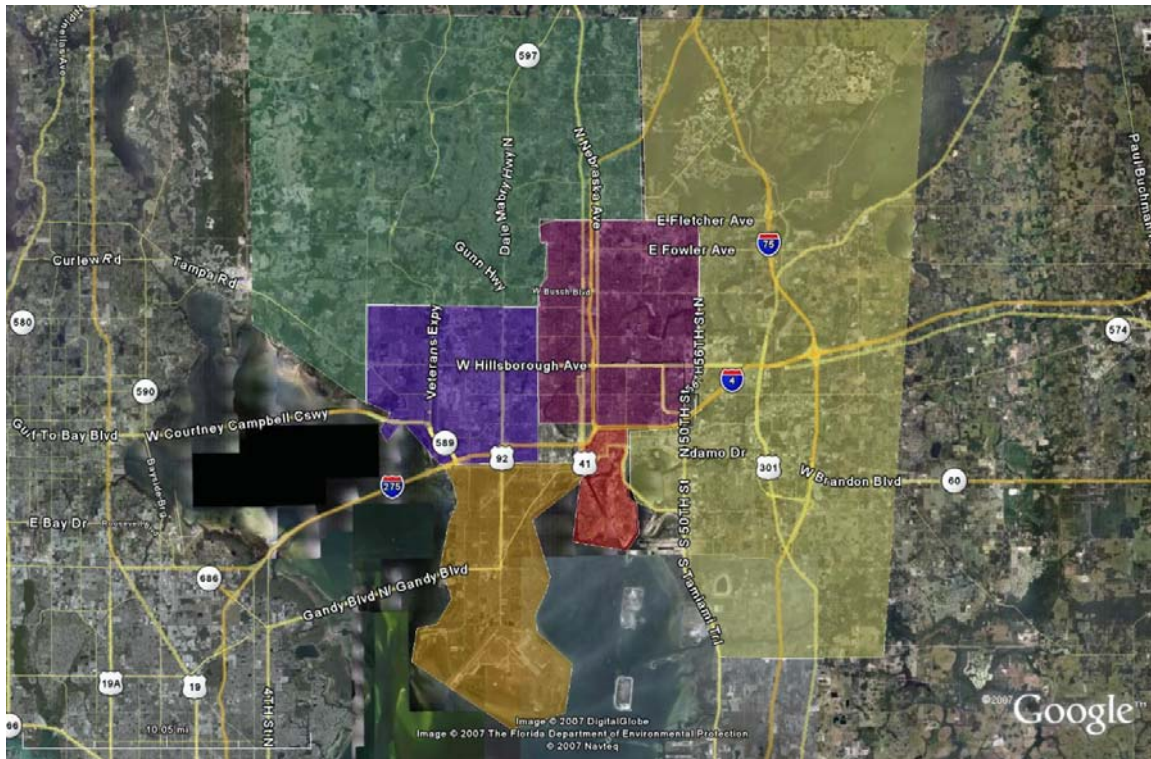
Section 4: Office Market

4A – Office Market Trends

The Hillsborough County office market has more than 30 million square feet of office space (not including government offices). Most office development in the county is located in three prominent submarkets including Westshore, downtown Tampa and the I-75 corridor in east Hillsborough. The Westshore District, with an inventory of 12 million square feet, is by far the largest office submarket in Hillsborough County comprising over one-third of the total inventory of office space. There is 7.4 million square feet of office space along the I-75 Corridor, the second largest submarket, and 6.8 million in the downtown Tampa CBD.

Figure 20: Hillsborough County Office Submarkets

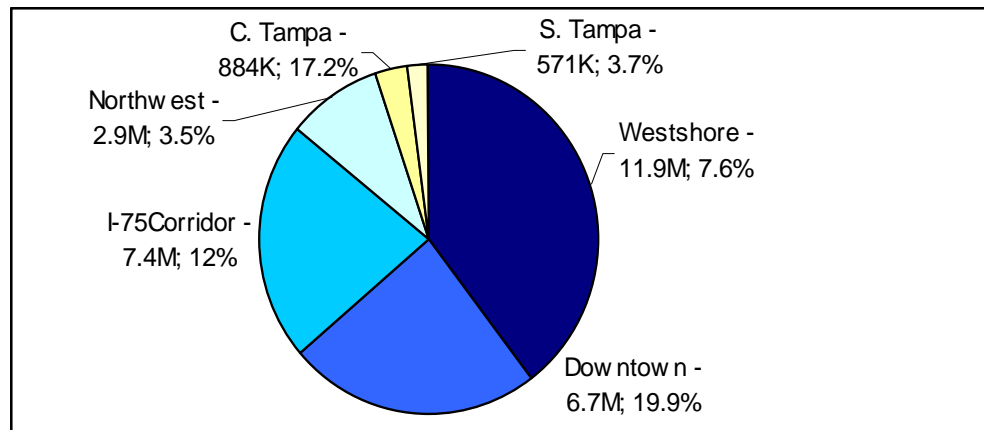
Source: Maddux Report, Lambert Advisory



The Hillsborough County market has added approximately ± 2.0 million square feet of new office space to the total inventory since 2002, or $\pm 500,000$ square feet per year, on average, for the four years ending in 2006. During this time, the biggest gains of new space were in the I-75 Corridor, which added over 1.0 million square feet of new office space, and the Westshore District, which added $\pm 620,000$ square feet.

Figure 21: Hillsborough County Office Profile (by Submarket) – Inventory; Vacancy

Source: Maddux Report; Black's Guide; Lambert Advisory



The East Tampa CRA lies within the Central Tampa submarket, which extends east from Armenia Avenue to 56th Street on the east, and north of Columbus Drive to Fletcher Avenue on the north. The total inventory of office space in this submarket is estimated at 884,140 square feet. There has not been any significant new office development (greater than 20,000 square feet) in this submarket over the past five years, with most "new" speculative office space limited to small strip center/professional office space or conversion of single family homes to office space along commercial corridors where zoning allows for this type of conversion. Of note, though, Hillsborough County School Board is currently building a 100,000± square foot administrative office building on the west side of 40th Street at 19th Avenue.

The Hillsborough County office market has steadily improved since 2001/2002, when the impact of 9/11 and the slowdown in the financial market led to higher vacancy rates and a decline in rents in 2002/2003. Since 2003, the office vacancy rate in Hillsborough has steadily declined from a high of 19.5 percent in that year, to 10.4 percent at the end of 2006. However, the market-wide vacancy rate pushed back up to 11.5 percent as of the 1st Quarter 2007.

Vacancy rates in the Central Tampa submarket also trended down during this time; however, this submarket historically has higher vacancy rates than other submarkets in Hillsborough County. This changed somewhat recently, as vacancy in the Central submarket was actually lower than that of the downtown CBD (17.2 percent versus 19.9 percent, respectively).

Figure 22: Hillsborough County Office Profile (by Submarket) – Rates & Absorption

Source: Maddux Report; Black's Guide; Lambert Advisory

Submarkets	2002	2003	2004	2005	2006	1Q 2007
Average Rental Rates (Full Service)						
Westshore	\$19.87	\$19.85	\$20.28	\$20.62	\$22.33	\$22.97
Downtown	\$19.32	\$18.62	\$19.44	\$19.87	\$20.54	\$20.57
South Tampa	\$16.17	\$16.86	\$18.70	\$18.56	\$18.94	\$19.21
Central Tampa	\$15.14	\$14.95	\$15.13	\$15.40	\$16.26	\$16.31
Northwest	\$14.39	\$14.18	\$15.47	\$16.59	\$17.42	\$18.57
I-75 Corridor	\$15.91	\$15.37	\$15.56	\$15.34	\$17.02	\$17.44
Total	\$18.28	\$17.91	\$18.59	\$18.70	\$20.00	\$20.47
Absorption Square Feet						
Westshore	166,740	(245,920)	443,800	551,710	354,000	(52,310)
Downtown	(162,340)	(105,800)	43,690	36,530	2,860	(85,190)
South Tampa	18,570	4,780	(7,830)	23,570	13,850	2,850
Central Tampa	49,410	(6,970)	(1,490)	23,570	38,620	14,250
Northwest	138,750	122,320	(38,160)	62,660	105,030	22,560
I-75 Corridor	112,600	(48,005)	428,250	765,900	222,590	(27,990)
Total	323,730	(279,595)	868,260	1,463,940	736,950	(125,830)

In spite of vacancy rate fluctuation within the broader market during the past few years, rental rates for office space in Hillsborough County reached an all time high of \$20.47 per square foot (full service) as of the 1st Quarter 2007. This represents an increase of 14 percent (3.4 percent annual average) since 2003. Gross rents for office space in suburban locations are closer to \$18.00 per square foot, though asking rates per square foot for new space has pushed over \$20.00 and as high as \$30.00± for new, premium office development. Rental rates for office space in the Central Tampa submarket were estimated at \$16.31 per square foot (full service) as of the 1st Quarter 2007, which is the lowest of all submarkets and roughly 20 percent below that of the County's average rate. The lower rental rates in the Central Tampa submarket is largely attributed to two factors: most of the office space is older (pre-1990), and most is Class "B" of "C" quality product.

Overall, the Hillsborough County office market absorbed 3.11 million square feet of office space (net) over the five years from 2001 through 2006. This equates to an average of ±622,700 square feet of office space absorbed per year over the five-year reporting period. The biggest demand year was 2005, when the market absorbed 1.46 million square feet; and the weakest was 2003, when the market had a net loss 279,595 square feet. There was also a net loss of 122,785 square feet of office space in Hillsborough in the 1st Quarter of 2007.

During the five-year period from 2001 through 2006, the Central Tampa submarket had a net absorption of 103,140 square feet of office space (20,628 square feet per year, on average). The high mark during this time was in 2002, when the submarket absorbed 49,410 square feet, before a net loss of 6,970 and 1,490 square feet in 2003 and 2004, respectively. The submarket has had positive net absorption since 2004, and was one of three submarkets in the county showing a positive net absorption of space in the 1st

Quarter of 2007 at 14,250 square feet. The table below presents a representative sample of office projects in and around the East Tampa redevelopment area.

Figure 23: East Tampa (Submarket) – Comparable/Competitive Office Profile

Source: Maddux Report; Black's Guide; Lambert Advisory

Name of Project	Location	Year Built	Class	Total Sq. Ft. Rentable Space	Vacant Sq. Ft. Rentable Space	Max./Min Sq. Ft. Available	Rent/ Sq. Ft.(1)
Projects Located in East Tampa Study Area							
Bank of American Building	1933 E. Hillsborough Ave.	N/A	C	27,842	12,627	12,627/12,627	\$13.50 (N)
East Tampa Office	3702 East 21st Street	1972	C	7,854	1,122	1,122	\$14.00
Sanchez & Hayes Building	1601 E. Columbus Drive	1910	B	14,858	14,858	Neg	Neg
Subtotals/Avg.	-	-	-	50,554	28,607	12,627/1,122	\$13.54
Projects Located in Surrounding Neighborhoods							
Corporate Square	7402 N. 56th Street	1974	C	120,000	5,529	3,781/660	\$14.00
LeTourneau Executive	5118 N 56th Street	1977	B	48,243	18,700	8,500/425	\$13.50
Net Park @ Tampa Bay	5701 East Hillsborough	1976	B	939,679	114,613	114,613/2,165	\$16.00
North 59th Street Building	5421 N. 59th Street	1984	B	4,215	4,215	Neg	\$17.50
Tampa Heights - Suites	308 East Oak Street	1907	B	2,520	500	500/150	\$17.00
6606 N. 56th Street	6607 N. 56th Street	1970	C	31,407	1,665	1,665	\$12.00
Ybor City Offices	1602 N. 21st Street	1980	B	8,712	3,175	3,175/1,375	\$16.50
Ybor Professional Center	2109 East Palm Ave.	2006	A	13,250	9,250	8,000/1,250	\$18.50
Ybor Square	1510 E. Palm Ave.	1975	A	86,000	31,146	9,989/4,419	\$17.00-\$19.00
Subtotals/Avg.	-	-	-	1,254,026	188,793	114,613/150	\$15.79
Totals/Avg.	-	-	-	1,304,580	217,400	114,613/150	\$15.70

(1) Rents are Full Service unless otherwise noted

4B – Estimate of Office Demand

In an effort to project potential office demand for the East Tampa CRA, we first analyze employment and office development trends for the broader region (Hillsborough County) and assume that a sub-market "captures" its fair share (or more than, or less than) of on-going growth within the broader region. Based upon this analysis, Lambert has prepared an estimate of office space demand for the East Tampa CRA market area over the next five years. This considers key assumptions including:

- Hillsborough County total employment is projected to increase more than 75,000 during the next 5 years, of which an estimated 20 percent of all new employment is in office jobs (or 15,000 office jobs)².

² Estimate based upon calculations from report employment growth report prepared by Lusk Center for Real Estate (University of Southern California).

- Based upon total office inventory, the Central Tampa submarket comprises approximately 3± percent of the County's total office inventory. However, based upon historical office market capture trends, Central Tampa submarket has captured more than its fair share (as much as 8 percent) of net office absorption during the past few years. Therefore, for purposes of this analysis, we assume the Central Tampa submarket will capture roughly 4 to 6 percent of the County's office employment demand during the next five years.
- The Building Owners and Managers Association (BOMA) estimate of office space per employee (200 to 250 SF per employees), based on a survey of office developments in Florida.

Figure 21: East Tampa Office Demand Estimate

Source: Lambert Advisory

Net New Office Employment - Hillsborough County (5 years):		15,000 sq.ft.
<i>Estimated Office Sq.ft. per Worker</i>		225 sq.ft.
Net New Office Space Demanded - Hillborough County (5 years):		3,375,000 sq.ft.
% Capture - Central Tampa Submarket @:	4.0%	135,000 sq.ft.
% Capture - Central Tampa Submarket @:	6.0%	202,500 sq.ft.
East Tampa Office Demand - % Capture of Central Submarket		
<i>Moderate</i>		60,000 sq.ft.
<i>Aggressive:</i>		100,000 sq.ft.

Given the baseline assumptions for office demand growth and capture as set forth above, we have prepared estimates of office demand for the East Tampa CRA market area assuming: 1) growth remains relatively stable during the next few years (moderate growth) and, therefore, capture percentages are in line with historical trends; and 2) the City and/or the East Tampa CRA market area has an ability to capture more than its overall fair share of the broader submarket during the next few years, which may require some level of induced demand (e.g., public participation). As such, the East Tampa CRA market area is projected to have total demand for between 60,000 and 100,000 square feet of office space over the next five years. Note, estimates of net demand assumes that some of the existing vacant space in the market is absorbed and also that the 2011 market will maintain some level of vacancy – albeit lower than the current 17.2 percent level. Importantly, this does not necessarily mean that the East Tampa CRA market area will capture all of this demand since development costs for new office space may be prohibitive given current rental rates in the submarket; therefore, some of this demand may have to shift to area's outside of the district where land and cost to build is not as high.

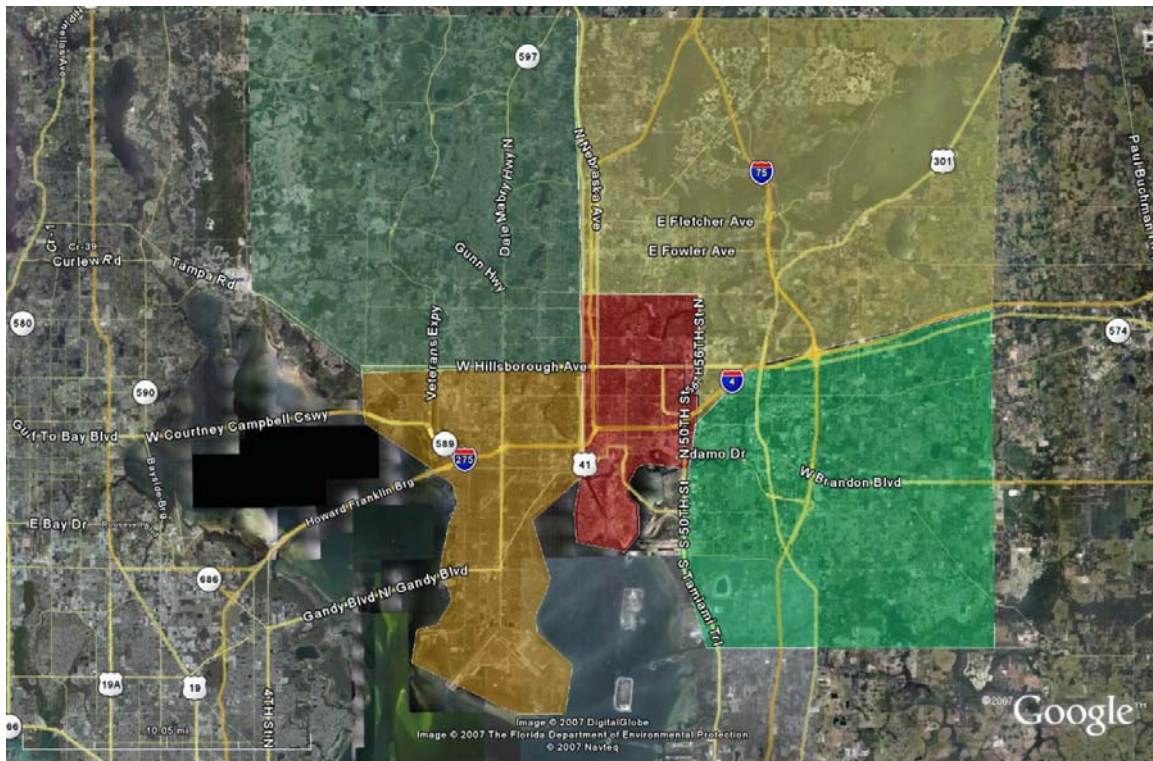
Section 5: Retail Market

5A – Retail Market Trends

As of year-end 2006, there was more 23.53 million square feet of shopping center retail space in Hillsborough County. The largest inventory of space, equal to 8.3 million square feet, is in Northwest Hillsborough, which includes three regional malls. The County added approximately 1.0 million square feet of new shopping center retail space between 2002 and 2006, equal to $\pm 250,000$ square feet per year, on average over the last four years. Most new shopping center development over the past four to five years has been in Northwest and Southeast Hillsborough County, corresponding with a proliferation of new residential development in those areas since 2000.

Figure 24: Retail Submarkets

Source: Maddux Report, Lambert Advisory



As outlined above, The East Tampa CRA is situated in the Central Tampa submarket, which also includes downtown Tampa, Ybor City, and the area north of I-4 between Florida Avenue (US Highway 41) on the west and 56th Street on the east and extending north to Busch Boulevard. The total inventory of shopping center space in this submarket is estimated to be 1.63 million square feet. Of this total, $\pm 442,000$ square feet is in two entertainment specialty retail centers located in the Downtown/Channelside District and Ybor City. The Channelside Bay Mall is a 230,000 square feet entertainment specialty that is 97 percent occupied. Centro Ybor, in Ybor City, is 212,000 square feet and is 89 percent occupied. Asking rents at both centers

range between \$20.00 and \$30.00 per square foot, net. However, both centers have struggled with tenant turnover, and are having a difficult time solidifying the critical mass needed to generate retail sales in support of asking rents.

Figure 25: Hillsborough County Retail Profile (by Submarket) – Inventory and Vacancy

Source: Maddux Report; Loop Net; Lambert Advisory

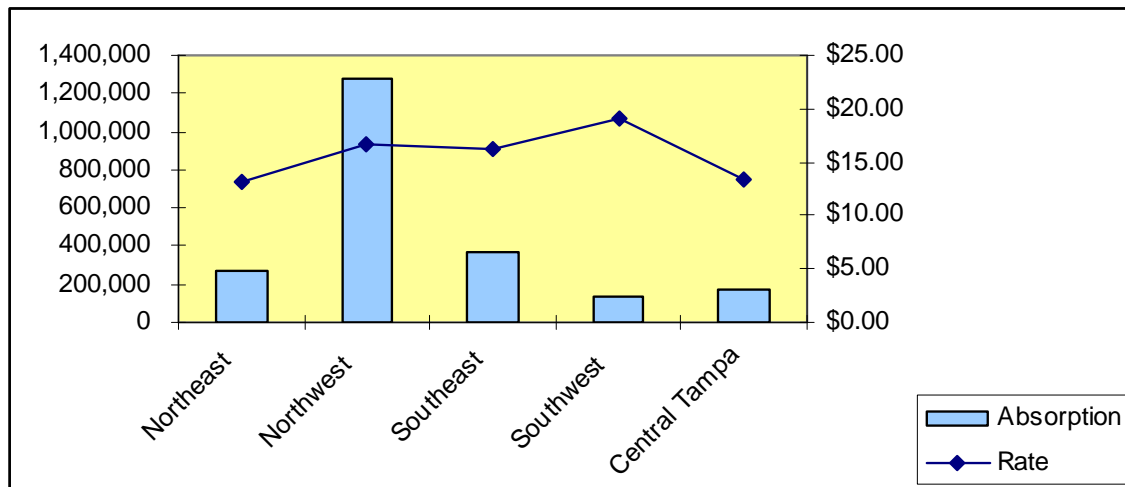
Submarkets	2002	2003	2004	2005	2006
Existing Leasable Space Square Feet					
Northeast	3,935,750	3,999,100	4,054,100	4,194,900	4,194,900
Northwest	8,068,400	8,136,400	8,136,400	8,136,400	8,272,400
Southeast	6,398,750	6,487,750	6,548,750	6,656,750	6,918,000
Southwest	2,470,000	2,470,000	2,470,000	2,513,800	2,513,800
Central Tampa	1,632,300	1,632,300	1,632,300	1,632,300	1,632,300
Total	22,505,200	22,725,550	22,841,550	23,134,150	23,531,400
Vacancy Rate					
Northeast	6.4%	6.2%	8.1%	10.6%	11.4%
Northwest	3.2%	3.9%	4.6%	4.2%	3.4%
Southeast	6.1%	5.2%	5.6%	5.1%	6.0%
Southwest	6.1%	3.9%	2.9%	4.2%	4.2%
Central Tampa	13.7%	11.9%	6.7%	7.2%	4.7%
Total	5.1%	4.8%	5.4%	5.7%	5.9%

There has not been any new significant shopping center development in the Central Tampa submarket since 2000, when Channelside Bay Mall and Centro Ybor were delivered to the market. Most shopping centers in the Central Tampa market were developed in the 1970s and 1980s. Within the immediate East Tampa redevelopment area there are only two significant neighborhood shopping centers including: the Tampa Festival Center, with 131,553 square feet of GLA and the Eastgate Shopping Center with 168,817 square feet of GLA. There is a standalone (renovated) Sweetbay Supermarket on Dr. Martin Luther King Jr. Boulevard, just west of Nebraska Avenue, and a K-Mart anchored discount center (Tampa Plaza), on Florida Avenue (U.S. Highway 41) two miles north of Hillsborough Avenue.

The market-wide vacancy rate for retail space was at a relatively low 5.9 percent at the end of 2006. In the Central Tampa submarket it was 4.7 percent, compared to 7.2 percent at the end of 2005, with the leasing of 45,740 square feet of space at Channelside Bay Mall in the 4th Quarter of 2006 being the primary contributing factor. The Eastgate Shopping Center, in the East Tampa redevelopment area, is 100 percent occupied and the Tampa Festival Center 98 percent occupied.

Figure 26: Hillsborough County Retail Profile (by Submarket)
Current Rate & Net Absorption (5 years)

Source: Maddux Report; Loop Net; Lambert Advisory



Average rental rates for shopping center space in Hillsborough County have trended upward since 2002, increasing six percent, from \$15.16 to \$16.06 per square foot, between 2005 and 2006. This same trend holds true for each of the submarkets. In the Central Tampa submarket, the average rental rate registered \$13.38 per square foot at the end of 2006, an 11 percent increase from 2005 when the average rental rate was at \$12.09. Even with the higher annual increase, the average rental rate for retail space in the Central Tampa submarket is lower than the market-wide average and, as it has been historically, among the lowest in the County. Take away the higher rental rates (\$20 to \$30 per square foot) at Channelside and Centro Ybor, and the average rental rate for shopping center space in Central Tampa would fall below \$13.00 per square foot, or roughly 20 percent below the County's average. Notably, though, the current rental rate for non-anchor retail space at both Tampa Festival Center and the Eastgate Shopping Center is at \$15.00 per square foot, which is more in line with the County average.

The Hillsborough County retail market absorbed 2.2 million square feet of space between 2002 and 2006, equal to an average of 443,600 square feet per year during the period. This number is inflated due to the absorption of 1.17 million square feet of regional mall space (the International Mall) in the Westshore District of Northwest Tampa in 2001/2002. If the mall space is excluded, annual absorption of retail space in the county would be in the range of 1 million square feet, or 200,000 square feet per annum.

In Central Tampa, the market absorbed 166,970 square feet of retail space between 2001 and 2006, equal to 33,400 square feet per year, on average over the five years.

The table below presents a representative sample of office projects in and around the East Tampa redevelopment area.

Figure 27: East Tampa (Submarket) – Comparable/Competitive Retail Profile

Source: Maddux Report; Black's Guide; Lambert Advisory

Name of Project and Location	Year Built	Type Center and Anchor(s)	Total Sq. Ft. Rentable Space	Vacant Sq. Ft. Rentable Space	Rent/ Sq. Ft.	CAM
Projects Located in East Tampa Study Area						
Tampa Festival Center 2525 East Hillsborough Ave.	N/A	Neighborhood/ SaveRite Supermarket, Family Dollar	131,553	2,600	\$15.00	\$4.50
Eastgate Shopping Center SEC of 22nd Street and East Hillsborough Avenue	1970s	Discount, Ross Dress for Less	168,817	0	\$15.00	\$4.00
Subtotals/Avg.	-	-	300,370	2,600	\$15.00	\$4.25
Projects Located in Surrounding Neighborhoods						
East Lake Center 6201 East Hillsborough Ave.	1988	Strip Center	18,953	6,235	\$11.00	\$3.00
Northgate Shopping Center Florida Ave. & Busch Blvd.	1960s	Community Discount	281,075	0	\$10.00	\$2.00
Tampa Plaza 8223 N. Florida Avenue	1968	Community Discount/ K-Mart, Payless Shoes	150,210	10,500	\$10.00	\$2.00
Terrace Shopping Center 56th Street & Busch Blvd.	1987/R	Neighborhood/ Save-A-Lot Supermarket, CVS Drugs	59,217	2,000	\$18.00	\$4.00
Fast Food Restaurant Site 5805 N. 56th Street	1976	Free Standing, Fast Food	2,725	2,725	\$19.80	N/A
Convenience Store Site, 106 W. Columbus	1986	Free Standing Convenience Store	2,072	2,072	\$12.75	N/A
Subtotals/Avg.	-	-	514,252	23,532	\$11.00	\$2.30
Totals/Avg.	-	-	814,622	26,132	\$12.47	\$3.05

R - Renovated

5B – Retail Demand & “Void” Analysis

In most cases, determining the magnitude and type of retail demand that exists within a defined area, a retail trade analysis is prepared to identify variations in retail supply and demand which may then be the focus for creating strategic retail (re)development initiatives. Typically, a Retail Trade Area is defined by using a loosely defined radius to approximate behavioral boundaries based on prospective retail patrons' propensity to travel beyond certain distances, as well as the amount and type of supply within a given area. These behavioral boundaries/physical elements are generally based both on distance and access to the market (trade) area, as well as distance and access to competitive retail inventory in the area. The trade area is the primary area from which area businesses may draw resident expenditure.

There is an inherent assumption in the delineation of a specific trade area that the area could be the location of certain types of retailers, such as a large discount store, or a small- to mid-size lifestyle centers (or open air, main-street type facilities with higher

architecture and a focus on certain retail sectors and/or mixed uses). If this should happen, the trade area would begin to see a lot of significant growth in other ancillary types of businesses. Further, the trade area represents the area from which local businesses may potentially draw patrons for food and beverage establishments, local stores and boutiques, small entertainment venues, and specialty businesses (e.g., fresh and prepared foods grocer, music store), on a regular basis. Furthermore, the trade area analysis takes into account expenditures by residents outside the defined area by utilizing inflow factors, and incorporates expenditures (to a minimal extent) by office employees in and visitors to the Trade Area.

As it pertains to the East Tampa CRA, application of a standard retail trade analysis is limited to an extent – namely, that existing retail supply in the study area is limited in quality. In other words, we would generally conclude that given our assessment of existing retail options (discussed in further detail below) the study area is in need of higher quality retail, but as we know the demographics are not attractive to many retailer providers. Therefore, our approach to the retail strategy herein is twofold: first, we want to get a general idea of the amount of retail (by type) that is supported within the study area, in light of population, income and inflow/outflow factors (Lambert Advisory's Retail Trade Model); and, second, identify certain retail opportunities (by type) that may be attracted to the area in light of the presence of existing stores and outlets already existing within the trade area and surrounding "competitive" market (referred herein the Retail Void Analysis).

Retail Trade Model (Estimate of Retail Demand)

As detailed within Section 2 outlining populations and households in the study area, following is a summary of primary characteristics utilized to support assumptions within the retail trade model:

Population and Households: According to Hillsborough County Planning Commission, population in the ETCRA is currently estimated at 30,874 (increasing to 32,789 by 2012).

Income: The current median household income in the CRA is approximately \$27,800, two-thirds of the City median of \$40,800. Median income is projected to increase approximately two percent annually through 2012. Regardless, for retail trade model purposes, we utilize per capita income, which for the market area is estimated to be \$13,707 (2007), and for which we project to increase to 2.5 annually during the next few years.

Utilizing a variety of data sources, we have built a series of models that estimates expenditures by each of these groups and translates it into square feet of retail space. Although it combines large amounts of information from a variety of sources, the way the *Retail Trade Model* (the full detail of which appears as an appendix to this report) derives the estimated demand for retail space is actually quite simple. The methodology is described in detail below.

- **Total Personal Income** – There are approximately 30,874 residents in the East Tampa CRA Retail Trade Area with per capita income of approximately \$13,800 which yields \$425 million in total personal income.
- **Total Non-Auto Retail Expenditure** – An estimate of non-automobile retail expenditure for the trade area is made by multiplying the Total Income by the percent of income that is spent on non-auto retail purchases in a given year. The percentage of household income (34.8%) spent on non-auto retail purchases was derived from the Department of Commerce 2003 Consumer Expenditure Survey, which is both region- and income cohort-specific.
- **Expenditure by Store Type** – Non-auto expenditure by store type for the market area is derived using the percentage of total non-auto store sales by store type for the Tampa-St. Petersburg-Clearwater, FL Metropolitan Statistical Area (as a proportion of total non-auto sales) based on an analysis of the 2002 Economic Census.
- **Primary Market Area Retention** – This is estimated based upon fieldwork, interviews, and location of competitive retail centers and is an estimate of the amount of retail purchases made by residents of the Retail Trade Area which is made inside the Retail Trade Area, by store type. Certain merchandise categories such as grocery or pharmacy have higher retention rates, in certain instances as high as 90 percent, because people typically shop for these goods and services close to home. For goods such as furniture and home furnishings, the trade area retention rate is lower (in the range of 20 to 30 percent) because people will typically travel further to make these purchases since they are made less frequently, and/or because other areas have a greater concentration of a particular type of retailer. For most categories, we have assumed this retention rate will be somewhat higher in the longer term than it is today, due to an improved corridor and increased retailer variety.
- **Percent Sales Inflow from Secondary Market** – While there is resident expenditure leakage from the trade area there is also inflow from residents who live outside the bounds of the trade area, as well as from seasonal residents not otherwise captured in statistical profiles. These inflow rates vary by type of merchandise, considering existing and potential trade area retailers. Presently, we assume this is relatively low; however, it is presumed to increase over time as improved retail options are made available.
- **Sales per Square Foot** – The sales per square foot figures are estimated average sales per square foot figures for stores, by merchandise category, in the trade area based on interviews and other sources of information, including the Urban Land Institute's 2002 Dollars & Cents of Shopping Centers.
- **Warranted Square Feet** – Is calculated using the following formula:

Net Sales Potential (by category) / Sales per Square Foot (by category)

Based upon the methodology outlined above, we have estimated demand for the current year, and projected it for the short term (or next 5 years). A summary of implied demand for retail space, by category, from residents is as follows.

Figure 28: Supportable East Tampa Retail Trade Area Space by Market Segment

Source: Lambert Advisory

	Current	Year 5	Change (5 Yrs.)
Estimated Population	30,874	32,789	1,915
Per Capita Income	\$13,707	\$15,508	1,801
Total Retail Expenditure Potential	\$147,434,144	\$177,154,697	\$29,720,553
Expenditure Potential by Category			
Food Services & Drinking Places	\$18,194,489	\$21,862,230	\$3,667,741
Shoppers Goods	\$51,343,590	\$61,693,702	\$10,350,112
Convenience Goods	\$47,243,237	\$55,309,987	\$8,066,750
Sales per Square Foot by Category			
Food Services & Drinking Places	\$350	\$350	
Shoppers Goods	\$261	\$261	
Convenience Goods	\$315	\$315	
Supportable Square Footage by Category			
Food Services & Drinking Places	51,984	62,464	10,479
Shoppers Goods	196,916	236,612	39,695
Convenience Goods	151,606	182,168	30,562
Building Material, Garden	43,995	52,863	8,869
Total Supportable Retail Space	444,501	534,106	89,605

As summarized above, the East Tampa CRA currently has demand for roughly 425,000 to 475,000 square feet of retail, which comprises most non-auto retail categories. Considering the two largest existing retail centers in the market area, which total approximately 300,000 square feet, along with the small local retail/convenience stores and shops, there appears to be a relative balance in retail supply and demand within the district. However, in spite of this correlation, it is evident that the East Tampa CRA is over-supplied by lower-quality retail. This will continue to have a negative impact on retention and “inflow” demand capture in the future, demand that is critical to supporting the redevelopment effort. As a matter of fact, from population and income growth alone during the next few years, there is projected net new demand for an additional 65,000 to 95,000 square feet of retail space in the East Tampa CRA – keeping all retention and inflow factors constant. Importantly, though, any repositioning and/or improvement in retail supply within the area would enhance retention and “inflow” factors and we estimate potential net new retail demand could be in the range of 120,000 to 160,000 square feet of retail during the next five year period.

Retail Void Analysis

We believe the retail component to the redevelopment effort in East Tampa is best served by at least exploring potential large and/or recognized regional and national tenants that may be encouraged to participate in the district's future growth. Therefore, a necessary exercise in designing a retail strategy (and more specifically a merchandising strategy) is to identify which retailers already serve the area, with particular emphasis on those actually located within the study area. This "retail void analysis" allows the identification of retail opportunities by showing where key retailers already are operating.

Naturally, the mere identification of retailer locations is not in and of itself enough to provide a list of retail opportunities. Each retailer has its own discrete set of location guidelines. Demographic and psychographic characteristics are important considerations when a retailer selects a new site, but often this provides just the first cut. Retailers also have firm ideas as to the image of a suitable retail district or project. They seek locations that reinforce the image they seek to project. One way they evaluate this is to identify what retailers either already are located in the subject retail district, or that have committed to locate there in the future. This is called "retail co-tenancy," and it is an important element in retail "locational" analysis. In other words, while it may seem plausible that a retailer may be attracted by a competitor's absence from a market, they may just as easily conclude that the competitor's absence is a "red flag" indicating that the market is not all it could be.

Most retailers are in a battle for market share, and locational decisions rely very heavily on the location of the existing competition. Usually the location and quality of competition is as important as market demographics when a retailer is evaluating a site. In some cases the effort to increase or maintain market share may overrule all other considerations. A case in point involves Home Depot in Annapolis, Maryland, where The Home Depot located a duplicate store directly across the highway from an existing store just to keep Lowe's out of the market. Any potential cannibalization of the original store's sales was deemed secondary to losing market share to Lowe's. Of course, the market must be large enough to support two stores, which is the case in this particular instance.

Conversely, a thin market may only be able to support one of a particular type of store, and whoever is first into a market may have this market to themselves for a long time. Wal-Mart has shown themselves adept at this, opening stores in many markets too small to support a competitor's store. Even more canny on Wal-Mart's part is their willingness to replace their original stores with larger ones as the market grows, thus assuring that competition is pre-empted.

All this is to say that a retail void analysis is essential in designing a merchandising and leasing strategy, but it is less effective unless there is an understanding of the locational criteria of the retailers under study. Retailers do not automatically locate new stores in markets where they currently are absent. Often this absence is intentional as retailers decide against particular locations for one or more of the reasons described above.

Those attempting to lease a retail property must understand these factors when promoting their site to retailers. The quality of the market and the quality/location of the competition go hand in hand and are inseparable elements in the process of choosing where a retailer will build a new store.

In the end, a retail void analysis is foundational when designing merchandising and leasing strategies. Once this is completed the list of absent retailers can be winnowed and prioritized based upon knowledge of each retailer's locational requirements.

In our retail void analyses we begin with a long list of retailers that typically drive the development or redevelopment of retail projects. These fall into several categories:

- Department stores and discount department stores like JC Penney's or Wal-Mart
- Off price stores like Burlington Coat, Marshalls or Ross Dress for Less
- Big Boxes like Bed Bath and Beyond, Best Buy, Circuit City or Dick's Sporting Goods
- Supermarkets, including conventional stores like Publix and specialty stores like Whole Foods
- New large format pharmacies like Walgreens and CVS
- Multi-plex cinemas
- Mini-anchors like Ethan Allen, Jared's, or Linens n' Things, and Old Navy
- Lifestyle mini-anchors like Barnes and Noble, Pottery Barn, or Design Within Reach
- Specialty stores that are larger space users like Mens Wearhouse, Pier 1 or The Room Store
- Health clubs like L.A. Fitness and Gold's Gym
- Specialty stores considered lead tenants like Ann Taylor, Talbots, and Chico's
- Chain restaurants (called QSR's, or Quick Service Restaurants) like Chili's, Applebee's, Red Lobster and Outback Steakhouse
- Other retailers appropriate to the specific project in question, in this case Dollar stores and thrift stores

In the case of East Tampa we did not include retailers like Crate and Barrel, Whole Foods, Banana Republic, Chico's, or Brooks Brothers, stores geared toward an upscale and high-income market that is largely absent from the East Tampa study area. We likewise did not include department stores and stores that focus on suburban locations like Barbeques Galore, Babies R Us, and Bass Pro. We did include stores that may arguably be inappropriate in the study area like Best Buy and Kohl's. We are safe in excluding stores like West Elm from consideration, but we have seen retailers like Lowe's go into urban markets and we did not want to dismiss any retailers out of hand that could conceivably be targeted for an East Tampa location; particularly if there is potential for inducement through economic subsistence.

The fact is that the overriding pattern of retail in East Tampa can be simply expressed: few major retailers are located here at the present time. Three main retail concentrations surround East Tampa.

- *Dale Mabry Highway:* Situated to the west, this is a lengthy retail and commercial corridor. Except for upscale retailers, nearly all major retailers have

identified Dale Mabry as one of Tampa's most important retail corridors. It thus is home to a formidable retail aggregation. Dale Mabry is 5 to 9 miles away from the study area, depending on where on Dale Mabry the stores are located

- *Brandon:* located approximately 5-6 miles to the east, has emerged as a key suburban retail district. Most retailers that are located on Dale Mabry are located in Brandon as well centering on Brandon Town Center.
- *Busch Boulevard and Fowler Avenue:* These corridors are located to the north along with several other nearby commercial streets. This is clearly of secondary importance within the market, though it is prominent as a restaurant location as opposed to big boxes and specialty retail space.

Major chain retailers located within or adjacent to the study area are few. Ross Dress for Less is the only conventional retail chain located in the market. The Sav Rite division of Winn Dixie is the major supermarket chain located within the study area. Kash and Karry is located, as is Publix. Walgreens operates two stores in the area. Among the chain restaurants we find Denny's along with numerous fast food places either located within or adjacent to the study area: Arby's, Burger King (2), Church's Chicken (4), KFC (2), McDonald's (3), Taco Bell and Wendy's (2). There should be opportunities to expand the food outlet options in the East Tampa market such as an Appleby's or Chili's – presuming potential economic subsidy may be required to attract certain national chains.

We also identified for several stores commonly serving moderate income neighborhoods including three (3) Family Dollar stores. The various "\$1 stores" are located elsewhere, as are the Goodwill and Salvation Army thrift stores.

5C – Retail Findings and Conclusions

The principal opportunity in the East Tampa market is for additional stores catering to the immediate everyday needs of the populace, mainly supermarkets and pharmacies, along with thrift stores and discounters. Select corridors such as of 22nd Street, and sections of Hillsborough Boulevard may serve these uses well within either stand-alone facilities, mid-sized shopping centers, or part of a mixed use redevelopment program. Obtaining retailers to dovetail with a store such as Ross Dress for Less seems a suitable opportunity as well, along with additional food uses in the established retail and commercial corridors. Wal-Mart is obviously well adept at serving the cost-conscious shopper, and has been opening stores in urban neighborhoods and can serve several of these target uses at once with their strong grocery and pharmacy departments. They also will provide numerous other merchandise lines that area residents now must obtain elsewhere. Wal-Mart has experienced success in such markets since they often find that many other retailers have been reluctant to locate in such markets.

One particular redevelopment strategy is to build on existing commercial strips where the fast food establishments are concentrated. Improved traffic and regional access can help such retailers to succeed while providing additional exposure to the community.

Given the size of the study area there are several places for convenience retail. Thrift shops and dollar stores are important in these secondary retail nodes. These should adequately serve the study area and its immediate environs. Many of these shoppers will rely heavily upon them for staples (such as shampoo, towels, etc.). Furthermore, stores such as the Salvation Army and Goodwill, which are situated quite a distance from the market area, may be positioned to serve the community and surrounding areas.

Lastly, there should be an opportunity for many redevelopment programs within the area to serve as incubator locations for homegrown entrepreneurs. Many chains will be reluctant to enter the market (even though we increasingly see retailers at least talking about an "urban strategy"), but a healthy collection of independent stores operating at professional standards will garner attention.

In all, whether the redevelopment plan is targets a national anchor, local operator, or combination thereof, the City will most likely be required to participate; either to entice the national operators and/or support the local retailers.

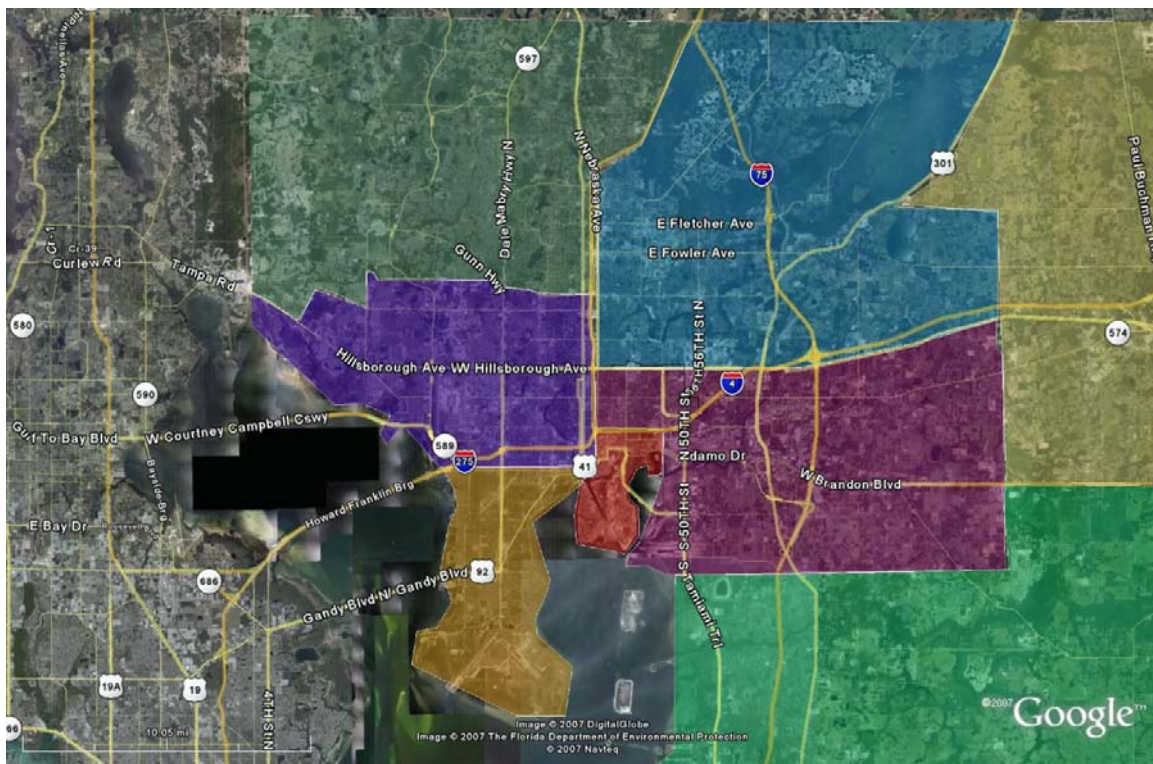
Section 6: Industrial Market

6A – Industrial Market Trends

The total inventory of industrial space in Hillsborough County is estimated at 87.0 million square feet. There are eight submarkets, including three that are west of I-275 and are generally influenced by Tampa International Airport; and five submarkets east of I-275 that are generally influenced by the Port of Tampa and the I-75 corridor in eastern Hillsborough.

Figure 29: Hillsborough County Industrial Submarkets

Source: Maddux Report, Lambert Advisory

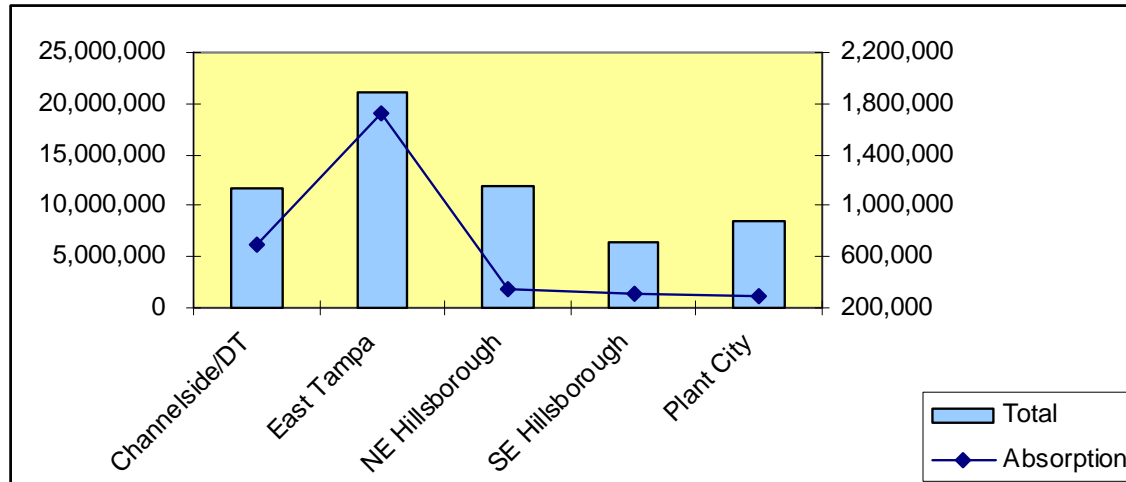


The Westshore/Airport submarket, west of I-275, and the East Tampa submarket, east of I-275, are the largest submarkets in the county, with an inventory of 18.8 million and 21.2 million square feet, respectively.

The Hillsborough County industrial market has steadily improved since 2002. The market delivered 1.5 million square feet of new industrial space between 2002 and 2006 and absorbed 3.6 million square feet during this same time period. As a result, the market-wide vacancy rates declined to an historical low 3.7 percent at year-end 2006.

Figure 30: Hillsborough County Industrial Profile (by Submarket) – Inventory

Source: Maddux Report; Black's Guide; Lambert Advisory



Tight market conditions coupled with increases in property taxes and insurance have led to a shift in leasing strategies and rent structures for industrial space in the market. Rents for warehouse space, which traditionally were charged out as gross rents that included most expenses with the exception of a small common area maintenance (CAM) charge of \$0.50 to \$1.00 per square foot, are now being assigned as triple net rents, so that tenants pay base rent plus all expenses (taxes, insurance, utilities, and CAM) typically ranging between \$3.00 and \$3.50 per square foot.

The East Tampa industrial submarket comprises a fairly large geographic area and includes the area east of I-275 and north of Columbus Drive, extending east along I-4 to the Dover area of east Hillsborough and south of I-4 to Bloomingdale Avenue, south of Brandon, and then west again to Hillsborough Bay.

Figure 31: Hillsborough County Industrial Profile (Markets East of I-275) – Rental Rates

Source: Maddux Report; Black's Guide; Lambert Advisory

Average Rental Rates (1) East of I-275					
Downtown/Channelside - WH	\$4.00	\$4.25	\$4.86	\$6.01	\$6.65
East Tampa - WH	\$4.75	\$4.92	\$5.63	\$5.78	\$6.40
East Tampa - Flex	\$9.25	\$9.62	\$9.79	\$10.84	\$11.01
Northeast Hillsborough - WH	\$4.31	\$4.75	\$5.19	\$5.43	\$5.75
Northeast Hillsborough - Flex	\$8.90	\$9.26	\$9.45	\$10.16	\$10.78
Southeast Hillsborough - WH	\$4.90	\$5.25	\$6.01	\$5.65	\$6.25
Southeast Hillsborough - Flex	\$9.46	\$9.65	\$9.83	\$10.57	\$10.82
Plant City - WH	\$3.25	\$3.50	\$4.00	\$4.34	\$4.80
Subtotal East of I-275 - WH	\$4.24	\$4.53	\$5.14	\$5.44	\$5.97
Subtotal East of I-275 - Flex	\$9.20	\$9.51	\$9.69	\$10.52	\$10.87

(1) Rents are industrial gross for warehouse and triple net for flex space

The vacancy level in the East Tampa submarket registered 3.7 percent at the end of 2006. This figure is down from 6.5 percent recorded in 2002 and reflects the strong leasing activity that has occurred in this submarket since 2002.

The average rental rate for warehouse space in the East Tampa submarket at the end of 2006 was estimated at \$6.40 per square foot and at \$11.01 per square foot for office service center/flex space, both figures higher than market-wide averages.

The strength of the East Tampa submarket over the past five years is underscored by absorption levels there since 2002. As previously referenced, the Hillsborough County industrial market absorbed 3.65 million square feet of space between 2002 and year-end 2006, equal to 730,400 square feet per year, on average, over the period. Over this same five-year period, the East Tampa submarket accounted for 47 percent of total demand for industrial space in the county, equal to a total of 1.7 million square feet or 365,000 square feet per year, on average.

Specific to the East Tampa CRA, the industrial market is largely concentrated along Columbus Drive east of 34th Street to 50th Street. Tenants/businesses in the area include marine repair and supplies, truck rental storage and sales, air conditioning supplies, and dairy product storage and distribution. Otherwise there are scattered sites along 40th Street and Hillsborough Avenue. There is also a concentration of industrial development to the east of the redevelopment area, including a major Anheuser Busch distribution campus on the east side of 50th Street at Chelsea Street. The Hillsborough County Area Regional Transit Authority's (HART) Central Operations Facility is also located in the area at 21st Avenue. In all, we estimate total industrial development within the corridor to be roughly 1.0 million square feet, or 5 percent of the East Tampa industrial submarket.

Most of the industrial space in the East Tampa CRA is older Class C warehouse space. Existing rents generally range between \$4.00 and \$4.50 per square foot, with expense passthrough of \$1.00 per square foot. However, given the tight market conditions for industrial space in the East Tampa submarket, asking rents have been higher, averaging over \$6.50 per square foot.

The following table provides a sampling of market characteristics of several industrial projects/buildings in the East Tampa CRA.

Figure 32: East Tampa CRA – Comparable/Competitive Industrial Profile

Source: Maddux Report; Black's Guide; Lambert Advisory

Industrial/ Business Park or Building Name and Location	Year Built	Type of Space	Total Rentable Sq. Ft.	Vacant/ Avail. Sq. Ft.	Percent Office	Ceiling Height	Loading	Rental Rate (1)
McBerry Street 2908 E. McBerry St.	1973	Warehouse (refrigerated)	14,035	14,035	N/A	18'	Dock High	\$7.00
Columbus Drive Warehouse 4501 Columbus Drive	1982	Warehouse	12,000	6,000	25%	9'	Grade Level	\$7.00
IMF Business Park 5107 N. 22nd Street	1985	Warehouse	75,000	75,000	N/A	N/A	Grade Level	\$5.50 (NNN)
2814 N. 36th Street (also for sale @ \$2,000,000)	1966	Warehouse	34,452	34,452	5%	24'	Dock High	3.95 (N)
4511 East Osborne Avenue (also for sale @ \$2,550,000)	1958	Warehouse	50,000	50,000	5%	30'	Grade Level	\$5.00 (NNN)
4001 East Lake Avenue	1979	Warehouse	50,000	45,000	10%	28'	Grade Level	\$4.25
Subtotals/Avg.	-	-	235,487	224,487	5-25%	9'-30'	-	±\$6.55

6B – Estimate of Industrial Demand

The East Tampa industrial submarket is the largest submarket in Hillsborough County at 21 million square feet of existing space. Accordingly, it has been among the most active in terms of absorption with nearly 365,000 square feet absorbed per annum. The East Tampa CRA represents a marginal amount of total space within the East Tampa industrial submarket, and has experienced very limited net absorption during the past five years. Nonetheless, in spite of the submarket's relative sub-par conditions and recent performance, there are scattered sites within East Tampa CRA that represent strong potential for new warehouse and/or flex development.

Similar to office demand, demand for industrial development is largely dependent upon employment growth, and specific to industrial development, considers the on-going success and growth of the port and airport. Based upon economic and employment growth trends set forth above, we believe that industrial development growth and absorption within the East Tampa industrial market will remain solid during the next few years, in line with historical trends. East Tampa CRA should be in a position to capture some of this demand, but the district has a limited amount of sizeable parcels that could accommodate industrial development (or cluster) of critical mass.

Nonetheless, we see an opportunity to build stand-alone industrial buildings in the range of 30,000 to 40,000 square feet (single or multi-tenant) on selected, smaller infill sites along the western fringes of the CRA. Or, if a more aggressive redevelopment initiative to promote industrial development is undertaken (e.g., business relocation), the opportunity to build a small professional industrial park with up to 120,000 square feet may be warranted. The opportunity for industrial uses would most likely require a targeted industries initiative to attract a few larger businesses to anchor a specific program.

APPENDIX: Retail Trade Model

Resident Expenditure Estimate, By Major Retail Category, East Tampa CRA Study Area
Five Year

	Current	Year 1	Year 2	Year 3	Year 4	Year 5
Total Population	30,874	31,257	31,563	31,809	32,005	32,789
Per Capita Income	\$13,707	\$14,050	\$14,401	\$14,761	\$15,130	\$15,508
Total Income	\$423,189,918	\$439,150,691	\$454,541,900	\$469,523,649	\$484,228,665	\$508,498,776
% of Total Income Expended on Non-Auto Retail Expenditure	34.84%	34.84%	34.84%	34.84%	34.84%	34.84%
Total Non-Auto Retail Expenditure	\$147,434,144	\$152,994,680	\$158,356,787	\$163,576,243	\$168,699,290	\$177,154,697
Distribution by Store Type - 2002 Census; WPB Metro Area						
General merchandise stores	21.35%	21.35%	21.35%	21.35%	21.35%	21.35%
Department stores	11.41%	11.41%	11.41%	11.41%	11.41%	11.41%
Other general merchandise stores	9.94%	9.94%	9.94%	9.94%	9.94%	9.94%
Clothing & clothing accessories stores	7.29%	7.29%	7.29%	7.29%	7.29%	7.29%
Clothing stores	5.28%	5.28%	5.28%	5.28%	5.28%	5.28%
Men's clothing stores	0.26%	0.26%	0.26%	0.26%	0.26%	0.26%
Women's clothing stores	1.07%	1.07%	1.07%	1.07%	1.07%	1.07%
Children's & infants' clothing stores	0.23%	0.23%	0.23%	0.23%	0.23%	0.23%
Family clothing stores	3.15%	3.15%	3.15%	3.15%	3.15%	3.15%
Clothing accessories stores	0.11%	0.11%	0.11%	0.11%	0.11%	0.11%
Other clothing stores	0.45%	0.45%	0.45%	0.45%	0.45%	0.45%
Shoe stores	0.84%	0.84%	0.84%	0.84%	0.84%	0.84%
Jewelry, luggage, & leather goods stores	2.15%	2.15%	2.15%	2.15%	2.15%	2.15%
Jewelry stores	1.09%	1.09%	1.09%	1.09%	1.09%	1.09%
Luggage & leather goods stores	0.08%	0.08%	0.08%	0.08%	0.08%	0.08%
Furniture & home furnishings stores	4.45%	4.45%	4.45%	4.45%	4.45%	4.45%
Furniture stores	2.69%	2.69%	2.69%	2.69%	2.69%	2.69%
Home furnishings stores	1.76%	1.76%	1.76%	1.76%	1.76%	1.76%
Floor covering stores	0.71%	0.71%	0.71%	0.71%	0.71%	0.71%
Other home furnishings stores	1.05%	1.05%	1.05%	1.05%	1.05%	1.05%
Electronics & appliance stores	3.86%	3.86%	3.86%	3.86%	3.86%	3.86%
Appliance, television, & other electronics stores	3.10%	3.10%	3.10%	3.10%	3.10%	3.10%
Computer & software stores (D)	0.69%	0.69%	0.69%	0.69%	0.69%	0.69%
Camera & photographic supplies stores (D)	0.07%	0.07%	0.07%	0.07%	0.07%	0.07%
Sporting goods, hobby, book, & music stores	2.70%	2.70%	2.70%	2.70%	2.70%	2.70%
Sporting goods, hobby, & musical instrument stores	1.95%	1.95%	1.95%	1.95%	1.95%	1.95%
Sporting goods stores	0.88%	0.88%	0.88%	0.88%	0.88%	0.88%
Hobby, toy, & game stores	0.65%	0.65%	0.65%	0.65%	0.65%	0.65%
Sewing, needlework, & piece goods stores	0.20%	0.20%	0.20%	0.20%	0.20%	0.20%
Musical instrument & supplies stores	0.22%	0.22%	0.22%	0.22%	0.22%	0.22%
Book, periodical, & music stores	0.74%	0.74%	0.74%	0.74%	0.74%	0.74%
Book stores & news dealers	0.56%	0.56%	0.56%	0.56%	0.56%	0.56%
Prerecorded tape, compact disc, & record stores	0.19%	0.19%	0.19%	0.19%	0.19%	0.19%
Home Centers, Paint & wallpaper stores, Hardware Stores (D)	1.50%	1.50%	1.50%	1.50%	1.50%	1.50%
Miscellaneous store retailers	4.16%	4.16%	4.16%	4.16%	4.16%	4.16%
Florists	0.27%	0.27%	0.27%	0.27%	0.27%	0.27%
Office supplies, stationery, & gift stores	1.71%	1.71%	1.71%	1.71%	1.71%	1.71%
Office supplies & stationery stores	1.08%	1.08%	1.08%	1.08%	1.08%	1.08%
Gift, novelty, & souvenir stores	0.63%	0.63%	0.63%	0.63%	0.63%	0.63%
Used merchandise stores	0.32%	0.32%	0.32%	0.32%	0.32%	0.32%
Other miscellaneous store retailers	1.86%	1.86%	1.86%	1.86%	1.86%	1.86%
Pet & pet supplies stores	0.39%	0.39%	0.39%	0.39%	0.39%	0.39%
Art dealers	0.05%	0.05%	0.05%	0.05%	0.05%	0.05%
All other miscellaneous store retailers	0.92%	0.92%	0.92%	0.92%	0.92%	0.92%
Food & beverage stores	22.31%	22.31%	22.31%	22.31%	22.31%	22.31%
Grocery stores	21.07%	21.07%	21.07%	21.07%	21.07%	21.07%
Supermarkets & other grocery (except convenience) stores	20.12%	20.12%	20.12%	20.12%	20.12%	20.12%
Convenience stores	0.95%	0.95%	0.95%	0.95%	0.95%	0.95%
Specialty food stores	0.46%	0.46%	0.46%	0.46%	0.46%	0.46%
Beer, wine, & liquor stores	0.77%	0.77%	0.77%	0.77%	0.77%	0.77%
Food services & drinking places	14.31%	14.31%	14.31%	14.31%	14.31%	14.31%
Full-service restaurants	7.22%	7.22%	7.22%	7.22%	7.22%	7.22%
Limited-service eating places	5.05%	5.05%	5.05%	5.05%	5.05%	5.05%
Drinking places	0.58%	0.58%	0.58%	0.58%	0.58%	0.58%
Health & personal care stores	9.63%	9.63%	9.63%	9.63%	9.63%	9.63%
Pharmacies & drug stores	8.23%	8.23%	8.23%	8.23%	8.23%	8.23%
Cosmetics, beauty supplies, & perfume stores	0.24%	0.24%	0.24%	0.24%	0.24%	0.24%
Optical goods stores	0.44%	0.44%	0.44%	0.44%	0.44%	0.44%
Other health & personal care stores	0.72%	0.72%	0.72%	0.72%	0.72%	0.72%
Building material & garden equipment & supplies dealers	9.95%	9.95%	9.95%	9.95%	9.95%	9.95%
Other building material dealers	2.96%	2.96%	2.96%	2.96%	2.96%	2.96%
Lawn & garden equipment & supplies stores	0.41%	0.41%	0.41%	0.41%	0.41%	0.41%
Outdoor power equipment stores	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%
Nursery, garden center, & farm supply stores	0.25%	0.25%	0.25%	0.25%	0.25%	0.25%
Expenditure by Store Type - Detail						
General merchandise stores	\$ 31,476,191	\$ 32,663,328	\$ 33,808,102	\$ 34,922,420	\$ 36,016,156	\$ 37,821,328
Department stores	\$ 16,828,214	\$ 17,462,897	\$ 18,074,931	\$ 18,670,683	\$ 19,255,430	\$ 20,220,535
Other general merchandise stores	\$ 14,647,977	\$ 15,200,431	\$ 15,733,171	\$ 16,251,738	\$ 16,760,726	\$ 17,600,794
Clothing & clothing accessories stores	\$ 10,743,356	\$ 11,148,546	\$ 11,539,277	\$ 11,919,612	\$ 12,292,923	\$ 12,909,059
Clothing stores	\$ 7,779,926	\$ 8,073,349	\$ 8,356,301	\$ 8,631,725	\$ 8,902,062	\$ 9,348,244
Men's clothing stores	\$ 378,096	\$ 392,356	\$ 406,107	\$ 419,493	\$ 432,631	\$ 454,315
Women's clothing stores	\$ 1,579,123	\$ 1,638,680	\$ 1,696,112	\$ 1,752,016	\$ 1,806,888	\$ 1,897,451
Children's & infants' clothing stores	\$ 345,454	\$ 358,483	\$ 371,047	\$ 383,277	\$ 395,281	\$ 415,093
Family clothing stores	\$ 4,643,350	\$ 4,818,476	\$ 4,987,353	\$ 5,151,736	\$ 5,313,084	\$ 5,579,382
Clothing accessories stores	\$ 168,554	\$ 174,912	\$ 181,042	\$ 187,009	\$ 192,866	\$ 202,533
Other clothing stores	\$ 665,347	\$ 690,441	\$ 714,640	\$ 738,194	\$ 761,314	\$ 799,472
Shoe stores	\$ 1,240,184	\$ 1,286,958	\$ 1,332,063	\$ 1,375,968	\$ 1,419,062	\$ 1,490,187
Jewelry, luggage, & leather goods stores	\$ 3,162,747	\$ 3,282,031	\$ 3,397,059	\$ 3,509,026	\$ 3,618,926	\$ 3,800,310
Jewelry stores	\$ 1,608,861	\$ 1,669,540	\$ 1,728,053	\$ 1,785,010	\$ 1,840,915	\$ 1,933,184
Luggage & leather goods stores	\$ 114,385	\$ 118,699	\$ 122,859	\$ 126,909	\$ 130,883	\$ 137,443

Resident Expenditure Estimate, By Major Retail Category, East Tampa CRA Study Area

	Five Year							
Furniture & home furnishings stores	\$ 6,565,557	\$ 6,813,180	\$ 7,051,966	\$ 7,284,399	\$ 7,512,539	\$ 7,889,077		
Furniture stores	\$ 3,972,347	\$ 4,122,165	\$ 4,266,638	\$ 4,407,266	\$ 4,545,298	\$ 4,773,113		
Home furnishings stores	\$ 2,593,210	\$ 2,691,014	\$ 2,785,328	\$ 2,877,133	\$ 2,967,242	\$ 3,115,963		
Floor covering stores	\$ 1,040,731	\$ 1,079,982	\$ 1,117,833	\$ 1,154,677	\$ 1,190,840	\$ 1,250,526		
Other home furnishings stores	\$ 1,552,480	\$ 1,611,032	\$ 1,667,495	\$ 1,722,456	\$ 1,776,402	\$ 1,865,437		
Electronics & appliance stores	\$ 5,695,760	\$ 5,910,578	\$ 6,117,730	\$ 6,319,371	\$ 6,517,287	\$ 6,843,941		
Appliance, television, & other electronics stores	\$ 4,572,450	\$ 4,744,902	\$ 4,911,200	\$ 5,073,074	\$ 5,231,957	\$ 5,494,189		
Computer & software stores	\$ 1,023,045	\$ 1,061,630	\$ 1,098,838	\$ 1,135,055	\$ 1,170,604	\$ 1,229,276		
Camera & photographic supplies stores	\$ 100,264	\$ 104,045	\$ 107,692	\$ 111,242	\$ 114,725	\$ 120,476		
Sporting goods, hobby, book, & music stores	\$ 3,974,542	\$ 4,124,444	\$ 4,268,996	\$ 4,409,703	\$ 4,547,810	\$ 4,775,752		
Sporting goods, hobby, & musical instrument stores	\$ 2,876,460	\$ 2,984,947	\$ 3,089,562	\$ 3,191,395	\$ 3,291,346	\$ 3,456,312		
Sporting goods stores	\$ 1,296,844	\$ 1,345,755	\$ 1,392,920	\$ 1,438,831	\$ 1,483,894	\$ 1,558,269		
Hobby, toy, & game stores	\$ 951,652	\$ 987,544	\$ 1,022,155	\$ 1,055,846	\$ 1,088,914	\$ 1,143,491		
Sewing, needlework, & piece goods stores	\$ 297,808	\$ 309,040	\$ 319,872	\$ 330,415	\$ 340,763	\$ 357,842		
Musical instrument & supplies stores	\$ 330,156	\$ 342,608	\$ 354,615	\$ 366,303	\$ 377,776	\$ 396,710		
Book, periodical, & music stores	\$ 1,098,082	\$ 1,139,497	\$ 1,179,433	\$ 1,218,308	\$ 1,256,464	\$ 1,319,439		
Book stores & news dealers	\$ 822,565	\$ 853,589	\$ 883,505	\$ 912,625	\$ 941,208	\$ 988,382		
Prerecorded tape, compact disc, & record stores	\$ 275,517	\$ 285,908	\$ 295,929	\$ 305,682	\$ 315,256	\$ 331,057		
Home Centers, Paint & wallpaper stores, Hardware Stores	\$ 2,211,512	\$ 2,294,920	\$ 2,375,352	\$ 2,453,644	\$ 2,530,489	\$ 2,657,320		
Miscellaneous store retailers	\$ 6,128,399	\$ 6,359,534	\$ 6,582,421	\$ 6,799,378	\$ 7,012,328	\$ 7,363,794		
Florists	\$ 393,522	\$ 408,364	\$ 422,676	\$ 436,607	\$ 450,281	\$ 472,850		
Office supplies, stationery, & gift stores	\$ 2,523,639	\$ 2,618,819	\$ 2,710,603	\$ 2,799,944	\$ 2,887,636	\$ 3,032,368		
Office supplies & stationery stores	\$ 1,595,456	\$ 1,655,629	\$ 1,713,655	\$ 1,770,137	\$ 1,825,576	\$ 1,917,076		
Gift, novelty, & souvenir stores	\$ 928,183	\$ 963,190	\$ 996,948	\$ 1,029,807	\$ 1,062,060	\$ 1,115,291		
Used merchandise stores	\$ 466,562	\$ 484,158	\$ 501,127	\$ 517,644	\$ 533,856	\$ 560,614		
Other miscellaneous store retailers	\$ 2,744,676	\$ 2,848,193	\$ 2,948,015	\$ 3,045,182	\$ 3,140,554	\$ 3,297,963		
Pet & pet supplies stores	\$ 571,838	\$ 593,405	\$ 614,202	\$ 634,446	\$ 654,317	\$ 687,112		
Art dealers	\$ 77,352	\$ 80,269	\$ 83,083	\$ 85,821	\$ 88,509	\$ 92,945		
All other miscellaneous store retailers	\$ 1,360,568	\$ 1,411,882	\$ 1,461,365	\$ 1,509,532	\$ 1,556,809	\$ 1,634,838		
Food & beverage stores	\$ 32,885,726	\$ 34,126,024	\$ 35,322,061	\$ 36,486,280	\$ 37,628,995	\$ 39,515,004		
Grocery stores	\$ 31,067,657	\$ 32,239,386	\$ 33,369,302	\$ 34,469,157	\$ 35,548,697	\$ 37,330,440		
Supermarkets & other grocery (except convenience) stores	\$ 29,660,351	\$ 30,779,002	\$ 31,857,735	\$ 32,907,769	\$ 33,938,408	\$ 35,639,441		
Convenience stores	\$ 1,137,120	\$ 1,460,384	\$ 1,511,567	\$ 1,561,388	\$ 1,610,290	\$ 1,690,999		
Specialty food stores	\$ 680,948	\$ 706,630	\$ 731,396	\$ 755,503	\$ 779,165	\$ 818,217		
Beer, wine, & liquor stores	\$ 1,137,120	\$ 1,180,007	\$ 1,221,364	\$ 1,261,620	\$ 1,301,132	\$ 1,366,347		
Food services & drinking places	\$ 21,095,060	\$ 21,890,668	\$ 22,657,885	\$ 23,404,692	\$ 24,137,703	\$ 25,347,513		
Full-service restaurants	\$ 10,642,050	\$ 11,043,419	\$ 11,430,465	\$ 11,807,215	\$ 12,177,005	\$ 12,787,331		
Limited-service eating places	\$ 7,448,465	\$ 7,729,387	\$ 8,000,284	\$ 8,263,974	\$ 8,522,794	\$ 8,949,966		
Drinking places	\$ 855,064	\$ 887,313	\$ 918,411	\$ 948,682	\$ 978,394	\$ 1,027,432		
Health & personal care stores	\$ 14,204,653	\$ 14,740,388	\$ 15,257,004	\$ 15,759,876	\$ 16,253,460	\$ 17,068,102		
Pharmacies & drug stores	\$ 12,133,551	\$ 12,591,172	\$ 13,032,463	\$ 13,462,015	\$ 13,883,632	\$ 14,579,496		
Cosmetics, beauty supplies, & perfume stores	\$ 358,064	\$ 371,568	\$ 384,591	\$ 397,267	\$ 409,709	\$ 430,244		
Optical goods stores	\$ 651,091	\$ 675,647	\$ 699,327	\$ 722,377	\$ 745,001	\$ 782,341		
Other health & personal care stores	\$ 1,061,948	\$ 1,102,000	\$ 1,140,622	\$ 1,178,217	\$ 1,215,118	\$ 1,276,021		
Building material & garden equipment & supplies dealers	\$ 14,664,899	\$ 15,217,991	\$ 15,751,346	\$ 16,270,512	\$ 16,780,088	\$ 17,621,126		
Other building material dealers	\$ 4,370,451	\$ 4,535,284	\$ 4,694,235	\$ 4,848,958	\$ 5,000,822	\$ 5,251,469		
Lawn & garden equipment & supplies stores	\$ 598,115	\$ 620,673	\$ 642,426	\$ 663,601	\$ 684,384	\$ 718,686		
Outdoor power equipment stores	\$ 229,279	\$ 237,927	\$ 246,265	\$ 254,382	\$ 262,349	\$ 275,499		
Nursery, garden center, & farm supply stores	\$ 368,836	\$ 382,746	\$ 396,161	\$ 409,218	\$ 422,035	\$ 443,188		

Resident Expenditure Estimate, By Major Retail Category, East Tampa CRA Study Area

	Five Year					
Expenditure by Store Type - Summary	Current	Year 1	Year 2	Year 3	Year 4	Year 5
General merchandise stores	\$ 31,476,191	\$ 32,663,328	\$ 33,808,102	\$ 34,922,420	\$ 36,016,156	\$ 37,821,328
Clothing & clothing accessories stores	\$ 10,743,356	\$ 11,148,546	\$ 11,539,277	\$ 11,919,612	\$ 12,292,923	\$ 12,909,059
Furniture & home furnishings stores	\$ 6,565,557	\$ 6,813,180	\$ 7,051,966	\$ 7,284,399	\$ 7,512,539	\$ 7,889,077
Electronics & appliance stores	\$ 5,695,760	\$ 5,910,578	\$ 6,117,730	\$ 6,319,371	\$ 6,517,287	\$ 6,843,941
Sporting goods, hobby, book, & music stores	\$ 3,974,542	\$ 4,124,444	\$ 4,268,996	\$ 4,409,703	\$ 4,547,810	\$ 4,775,752
Home Centers, Paint & wallpaper stores, Hardware Stores	\$ 2,211,512	\$ 2,294,920	\$ 2,375,352	\$ 2,453,644	\$ 2,530,489	\$ 2,657,320
Miscellaneous store retailers	\$ 6,128,399	\$ 6,359,534	\$ 6,582,421	\$ 6,799,378	\$ 7,012,328	\$ 7,363,794
Shoppers Goods Subtotal	\$ 66,795,318	\$ 69,314,530	\$ 71,743,842	\$ 74,108,527	\$ 76,429,533	\$ 80,260,271
Food & beverage stores	\$ 32,885,726	\$ 34,126,024	\$ 35,322,061	\$ 36,486,280	\$ 37,628,995	\$ 39,515,004
Food services & drinking places	\$ 21,095,060	\$ 21,890,668	\$ 22,657,885	\$ 23,404,692	\$ 24,137,703	\$ 25,347,513
Health & personal care stores	\$ 14,204,653	\$ 14,740,388	\$ 15,257,004	\$ 15,759,876	\$ 16,253,460	\$ 17,068,102
Convenience Goods Subtotal	\$ 68,185,439	\$ 70,757,080	\$ 73,236,951	\$ 75,650,848	\$ 78,020,158	\$ 81,930,620
Building material & garden equipment	\$ 14,664,899	\$ 15,217,991	\$ 15,751,346	\$ 16,270,512	\$ 16,780,088	\$ 17,621,126
Primary Market Area Retention						
General merchandise stores	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
Clothing & clothing accessories stores	60.00%	60.00%	60.00%	60.00%	60.00%	60.00%
Furniture & home furnishings stores	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%
Electronics & appliance stores	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%
Sporting goods, hobby, book, & music stores	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%
Home Centers, Paint & wallpaper stores, Hardware Stores	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
Miscellaneous store retailers	65.00%	65.00%	65.00%	65.00%	65.00%	65.00%
Food & beverage stores	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%
Food services & drinking places	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
Health & personal care stores	85.00%	85.00%	85.00%	85.00%	85.00%	85.00%
Building material & garden equipment	30.00%	30.00%	30.00%	30.00%	30.00%	30.00%
Inflow from Secondary Market						
General merchandise stores	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%
Clothing & clothing accessories stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Furniture & home furnishings stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Electronics & appliance stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Sporting goods, hobby, book, & music stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Home Centers, Paint & wallpaper stores, Hardware Stores	20.00%	20.00%	20.00%	20.00%	20.00%	20.00%
Miscellaneous store retailers	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%
Food & beverage stores	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Food services & drinking places	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Health & personal care stores	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Building material & garden equipment	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Net Sales Potential						
General merchandise stores	\$29,508,929	\$30,621,870	\$31,695,095	\$32,739,769	\$33,765,146	\$35,457,495
Clothing & clothing accessories stores	\$7,735,216	\$8,026,953	\$8,308,279	\$8,582,121	\$8,850,904	\$9,294,522
Furniture & home furnishings stores	\$3,151,467	\$3,270,326	\$3,384,944	\$3,496,512	\$3,606,019	\$3,786,757
Electronics & appliance stores	\$2,733,965	\$2,837,077	\$2,936,510	\$3,033,298	\$3,128,298	\$3,285,092
Sporting goods, hobby, book, & music stores	\$1,907,780	\$1,979,733	\$2,049,118	\$2,116,657	\$2,182,949	\$2,292,361
Home Centers, Paint & wallpaper stores, Hardware Stores	\$1,326,907	\$1,376,952	\$1,425,211	\$1,472,186	\$1,518,294	\$1,594,392
Miscellaneous store retailers	\$4,979,324	\$5,167,121	\$5,348,217	\$5,524,495	\$5,697,516	\$5,983,083
Shoppers Goods Subtotal	\$51,343,590	\$53,280,033	\$55,147,374	\$56,965,038	\$58,749,126	\$61,693,702
Food & beverage stores	\$32,145,797	\$33,358,188	\$34,527,315	\$35,665,339	\$36,782,342	\$38,625,916
Food services & drinking places	\$18,194,489	\$18,880,701	\$19,542,426	\$20,186,547	\$20,818,769	\$21,862,230
Health & personal care stores	\$13,885,049	\$14,408,729	\$14,913,721	\$15,405,279	\$15,887,757	\$16,684,070
Convenience Goods Subtotal	\$64,225,335	\$66,647,619	\$68,983,462	\$71,257,165	\$73,488,868	\$77,172,217
Building material & garden equipment	\$5,059,390	\$5,250,207	\$5,434,214	\$5,613,327	\$5,789,131	\$6,079,289

Resident Expenditure Estimate, By Major Retail Category, East Tampa CRA Study Area

Sales Per Square Foot	Five Year					Year 5
	Current	Year 1	Year 2	Year 3	Year 4	
General merchandise stores	\$250	\$250	\$250	\$250	\$250	\$250
Clothing & clothing accessories stores	\$300	\$300	\$300	\$300	\$300	\$300
Furniture & home furnishings stores	\$225	\$225	\$225	\$225	\$225	\$225
Electronics & appliance stores	\$300	\$300	\$300	\$300	\$300	\$300
Sporting goods, hobby, book, & music stores	\$255	\$255	\$255	\$255	\$255	\$255
Home Centers, Paint & wallpaper stores, Hardware Stores	\$225	\$225	\$225	\$225	\$225	\$225
Miscellaneous store retailers	\$300	\$300	\$300	\$300	\$300	\$300
Shoppers Goods Subtotal	\$261	\$261	\$261	\$261	\$261	\$261
Food & beverage stores	\$275	\$275	\$275	\$275	\$275	\$275
Food services & drinking places	\$350	\$350	\$350	\$350	\$350	\$350
Health & personal care stores	\$400	\$400	\$400	\$400	\$400	\$400
Convenience Goods Subtotal	\$315	\$315	\$315	\$315	\$315	\$315
Building material & garden equipment	\$115	\$115	\$115	\$115	\$115	\$115
Average Per Square Foot Sales	\$271	\$271	\$271	\$271	\$271	\$271
Warranted Square Feet						
General merchandise stores	118,036	122,487	126,780	130,959	135,061	141,830
Clothing & clothing accessories stores	25,784	26,757	27,694	28,607	29,503	30,982
Furniture & home furnishings stores	14,007	14,535	15,044	15,540	16,027	16,830
Electronics & appliance stores	9,113	9,457	9,788	10,111	10,428	10,950
Sporting goods, hobby, book, & music stores	7,481	7,764	8,036	8,301	8,561	8,990
Home Centers, Paint & wallpaper stores, Hardware Stores	5,897	6,120	6,334	6,543	6,748	7,086
Miscellaneous store retailers	16,598	17,224	17,827	18,415	18,992	19,944
Shoppers Goods Subtotal	196,916	204,343	211,505	218,476	225,318	236,612
Food & beverage stores	116,894	121,303	125,554	129,692	133,754	140,458
Food services & drinking places	51,984	53,945	55,836	57,676	59,482	62,464
Health & personal care stores	34,713	36,022	37,284	38,513	39,719	41,710
Convenience Goods Subtotal	203,591	211,269	218,674	225,881	232,956	244,632
Building material & garden equipment	43,995	45,654	47,254	48,812	50,340	52,863
Total Warranted Retail Space	444,501	461,266	477,432	493,169	508,614	534,106
Non-Retail Space (Services)	66,675	69,190	71,615	73,975	76,292	80,116
Non-Retail Percent	15.00%	15.00%	15.00%	15.00%	15.00%	15.00%
Total	511,177	530,456	549,047	567,144	584,906	614,222
Annual Net New Demand	18,591	19,279	18,591	18,097	17,762	29,316
Cumulative Net New Demand	0	19,279	37,871	55,967	73,730	103,046

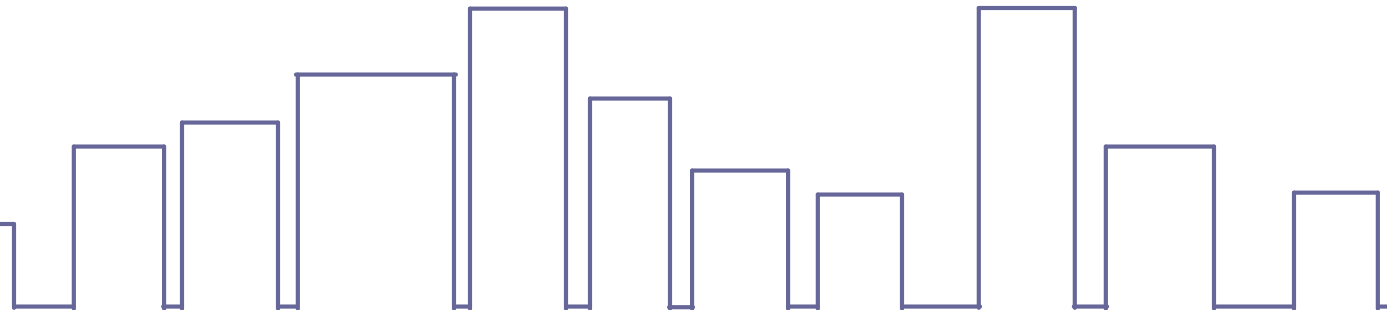
APPENDIX 5

CITY OF TAMPA NEIGHBORHOOD MARKET DRILLDOWN



City of Tampa Neighborhood Market DrillDown

Catalyzing Business Investment in Inner-City Neighborhoods



September 2008



About Social Compact

Social Compact is a national not-for-profit corporation led by a board of business leaders whose mission is to help strengthen neighborhoods by stimulating private market investment in underserved communities. Social Compact accomplishes this through its Neighborhood Market DrillDown analytic tool, developed to accurately measure community economic indicators, and provides this information as a resource to community organizations, government decision makers and the private sector. Social Compact is at the forefront of identifying the market potential of underserved neighborhoods and promotes public private partnership involving community members and leveraging private investment as the most sustainable form of community economic development.

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Acknowledgments

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Social Compact gratefully acknowledges the crucial support of the City of Tampa Department of Economic and Urban Development and Ed Johnson at the East Tampa Community Redevelopment Area, for serving as the principal partners in the DrillDown process, and whose local insights and expertise were integral to the project's success.

Social Compact would also like to recognize the Citi Foundation whose generous financial contributions made this work possible. Thanks are also due to: First American CoreLogic, for spearheading the Tampa DrillDown; SAS Institute Inc.; and ESRI for invaluable contributions of data, software, and expertise.

Additional thanks go to the following city; county; and state agencies for their collaboration and municipal data contributions: The City of Tampa Mayor's Office ; the Tampa Community Redevelopment Areas (CRAs); Tampa City Council; Tampa Department of Code Enforcement and Business Tax; Tampa Department of Growth Management and Development Services; Tampa Police Department; Tampa Department of Public Works; Tampa Department of Revenue and Finance; Tampa Department of Technology and Innovation; Tampa Water Department; Hillsborough County Property Appraiser; Hillsborough County Public Schools District; Hillsborough Area Regional Transit (HART); State of Florida Agency for Workforce Innovation.

Finally, this work would not have been possible without the continued leadership and support of Social Compact's dedicated Board of Directors.

Background

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

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

THE DRILLDOWN: BRIDGING THE INFORMATION GAP

Beginning with the premise that a significant reason for inner-city disinvestment is lack of good market information, Social Compact developed the Neighborhood Market DrillDown to address key barriers to private investment in and around inner-city neighborhoods. Social Compact offers its neighborhood market analyses to local governments, community organizations and businesses looking to attract investment or to invest in inner cities. These analyses provide alternative assessments of population, income and housing that do not rely on outdated and potentially inaccurate decennial census data.

The DrillDown was established to provide up-to-date profiles of market strength, stability and opportunity for small, dense, and rapidly changing urban geographies. The DrillDown builds on current, finely sieved market information drawn from a wide spectrum of commercial, proprietary and local government sources (e.g. tax assessor, building permit, and commercial credit companies). Rather than relying on any one information set, DrillDown findings surface from a combined body of data. These findings, tested against supplemental data and the intuitive knowledge of local market leaders, serve as the foundation for an objective, systematic analysis of business attributes.

Project Overview

In partnership with the City of Tampa Department of Economic and Urban Development, Social Compact applied its Neighborhood Market DrillDown analysis citywide with a particular emphasis on Tampa's Community Redevelopment Areas (CRAs). The 2008 Tampa DrillDown serves as an additional information source that can aid local government, community and business leaders to uncover market strengths and opportunities in the City's underserved neighborhoods, attract investment to these areas and inform the City's comprehensive economic development agenda going forward.

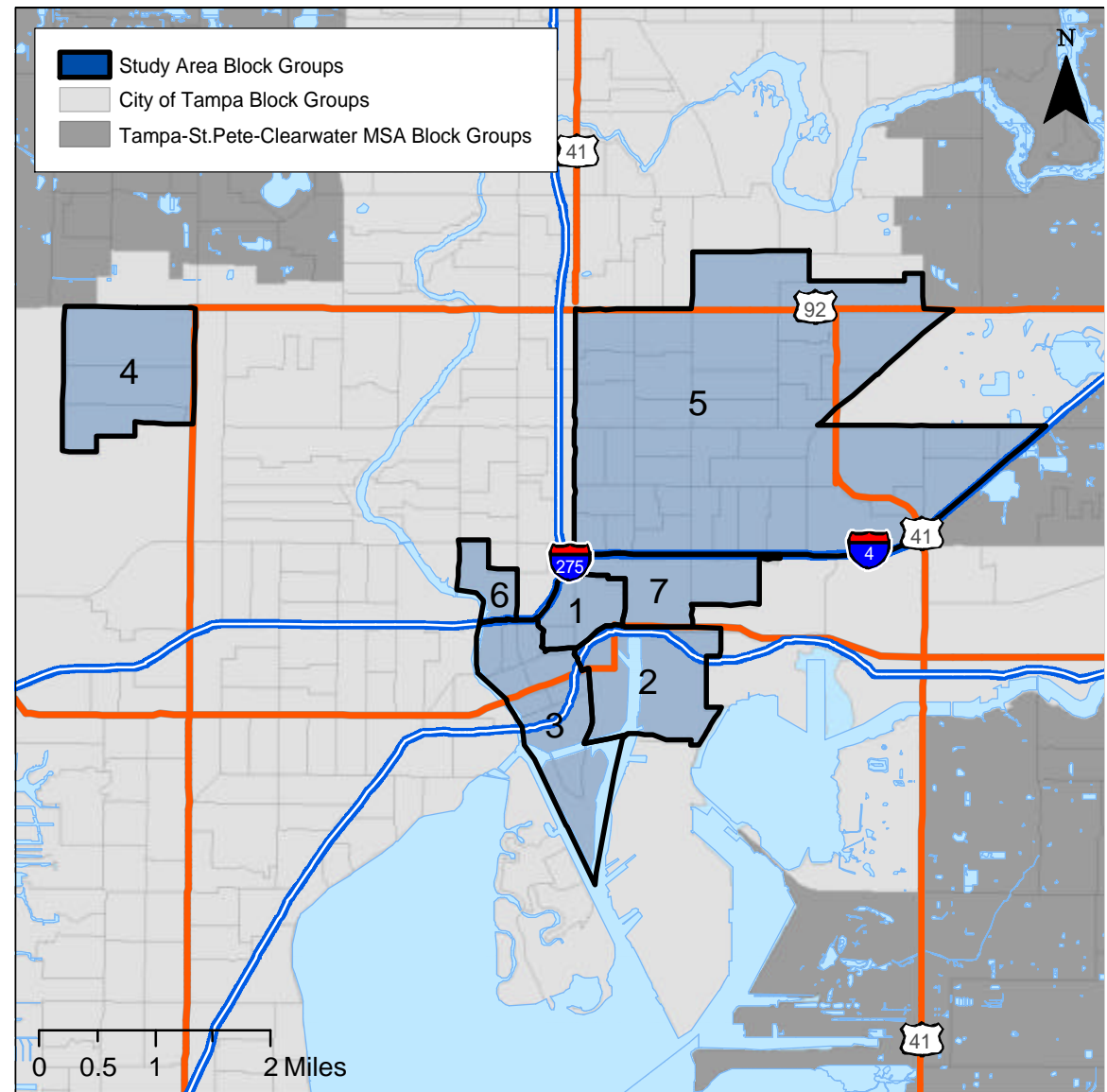
DrillDown study area neighborhoods include:

1. Central Park
2. Channelside
3. Downtown
4. Drew Park
5. East Tampa
6. Tampa Heights
7. Ybor

Note: DrillDown study area neighborhood boundaries are defined by census block groups and thus may not correspond exactly to the CRA boundaries.

For more information on Community Redevelopment Areas, please see Page 10.

2008 City of Tampa DrillDown Study Area Neighborhoods



City of Tampa—DrillDown Highlights

The DrillDown depicts greater market size, roughly 37,000 more people than reported by Census 2000 in the study area.

- The DrillDown population estimate of 346,037 is 12% higher, roughly 37,000 more people, than the Census 2000 population count of 309,058. DrillDown population estimates differ most from Census 2000 in Channelside CRA and Downtown CRA, where DrillDown population estimates are more than double Census 2000 figures.

Higher average household incomes, up 20% from Census 2000 reported incomes, signal greater buying power.

- The DrillDown estimates the average household income of Tampa residents at roughly \$64,000, a 20% increase from the Census 2000 average income of roughly \$53,000. Average household income increased the most in Channelside CRA (54%), Drew Park CRA (53%), Tampa Heights CRA (51%) and Ybor CRA (81%).
- In addition, the average income of individuals who purchased homes in Tampa between 2003 and 2006 (\$98,000) is 86% above the average income of city residents in 2000. Notably, the average income of new homebuyers in Central Park CRA and Tampa Heights CRA is more than four times the average income of neighborhood residents in 2000, and new homebuyers in Channelside CRA and Drew Park CRA report average incomes more than twice the 2000 income of residents in those areas.
- Income density in the City of Tampa, estimated at just over \$100,000 per acre, is more than twice the Tampa-St.Pete-Clearwater metropolitan statistical area (MSA) average of \$42,000. Downtown CRA, East Tampa CRA, and Ybor CRA all boast income densities more than double the city average.

\$500 million in missed aggregate income demonstrates greater market strength throughout the study area.

- The DrillDown aggregate income estimate for the study area, totaling more than \$9 billion, exceeds conventional market estimates by \$500 million. DrillDown analysis reveals an informal economy worth 6% (totaling \$500 million) of the total study area economy, and is considered unrecognized income missed by conventional market estimates.

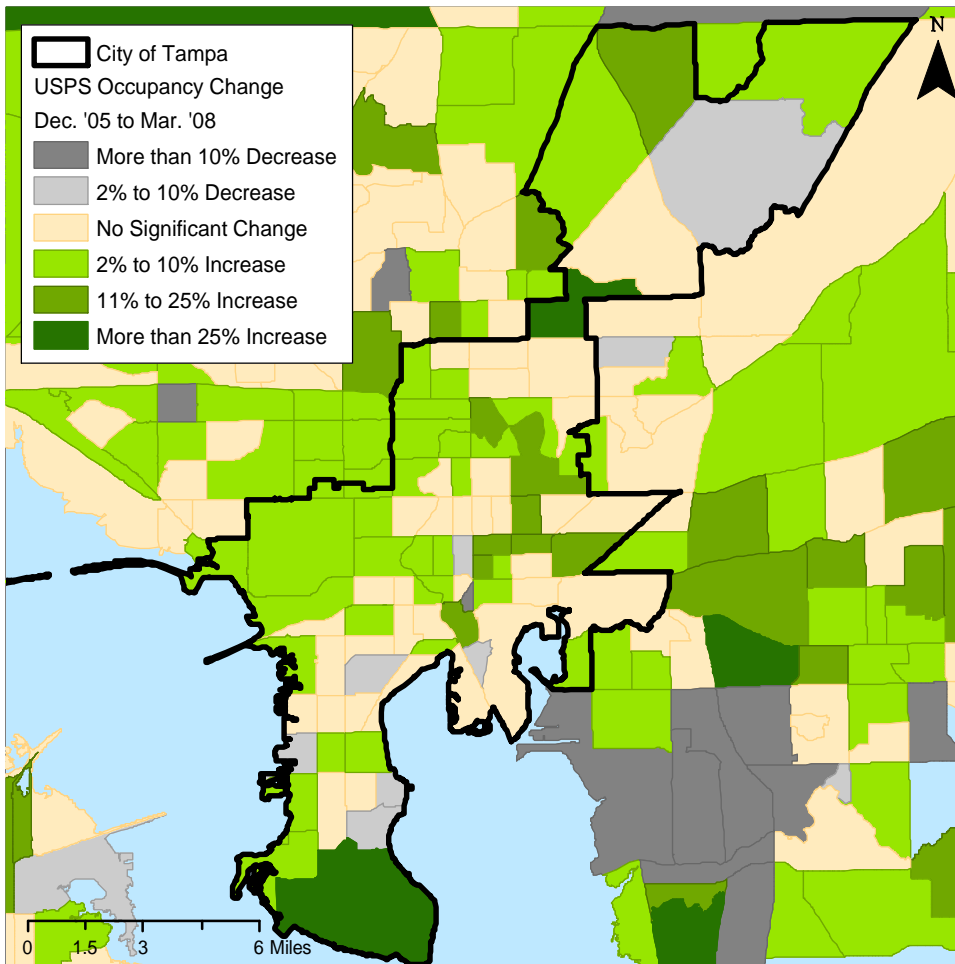
The DrillDown documents notable market stability, characterized by home ownership and rising home values in the study area.

- The DrillDown estimates that roughly 75% of residential buildings are owner occupied. Homeownership, when measured by building, is 20% above the Census 2000 reported figures, which measure owner occupancy by residential unit. By measuring homeownership at the building level, the DrillDown reveals a greater presence of stakeholders in the study area.
- Furthermore, the DrillDown estimates 25% of residential buildings citywide have undergone some rehabilitation (additions, alterations, and repairs) between 2000 and 2007.
- The DrillDown estimates median home sale value in the City of Tampa at \$214,000, more than twice the Census 2000 reported value of roughly \$100,000.

NOTE: Census 2000 income values are not adjusted for inflation.

Alternative indicators of market change support DrillDown findings

Map 1. Study Area % Change in USPS Delivery Addresses
By Census Tract, 2005 to 2007



NOTE: Map depicts change in USPS delivery addresses, both commercial and residential. Change may reflect occurrences such as business openings and closings and construction or demolition of commercial or residential structures.

DrillDown Total Population	346,037
% Change in USPS Count ('05-'07)	4.3%
% Change in IRS Returns ('98-'05)	8.9%

- The DrillDown population estimate (346,037) is 12% higher than the Census 2000 population estimate of 309,058..
- Alternative indicators, such as the percent change in USPS delivery addresses and the percent change in IRS returns, indicate positive market change in the study area.

% CHANGE IN USPS DELIVERY ADDRESSES: Change in the total number of residential and commercial addresses that the U.S. Postal Service (USPS) has recorded in their database excluding addresses identified as vacant (not collecting mail for 90 days or longer) or no-stat (not occupied). The data is provided by the U.S. Department of Housing and Urban Development (HUD) on a quarterly basis at the census tract level. Social Compact utilizes the earliest available count (2005) and the latest available count (2007) to calculate the percent change. Tract level data is adjusted to different geographies by weighting the number of postal counts to the Census 2000 households at the block group level. Change may reflect occurrences such as business openings and closings and demolition of existing commercial or residential structures.

% CHANGE IN IRS RETURNS: Change in the total number of tax returns received by the Internal Revenue Service (IRS). The data is provided by the IRS at the zip code level. Social Compact utilizes the earliest available count (1998) and the latest available count (2005) to calculate percent change; 1998 values are adjusted for inflation to 2005 dollars. Zip code level data is adjusted to different geographies by weighting the number of returns to the Census 2000 households at the block group level.

Alternative indicators of market change support DrillDown findings

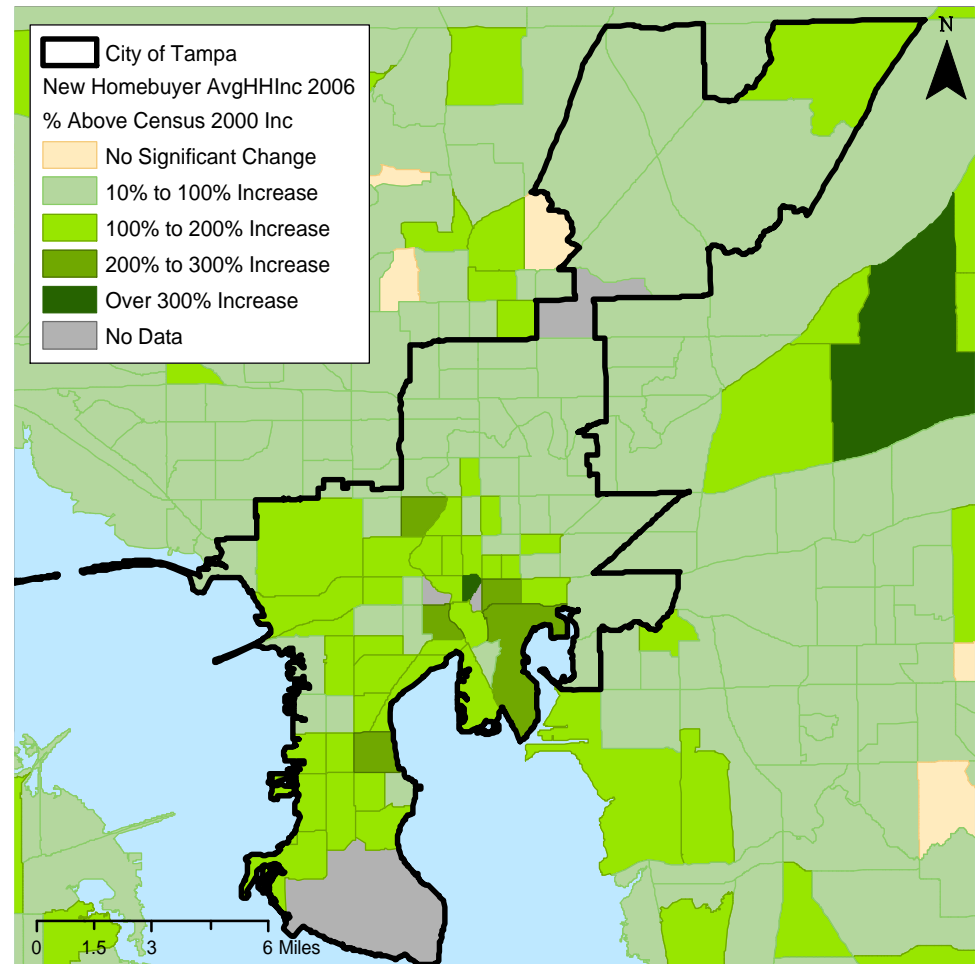
DrillDown Avg HH Income	\$63,684
Avg HH Income New Homebuyers ('03-'06)	\$97,828
% Change IRS Adj. Gross Income ('98-'05)	17.6%

- The DrillDown average household income estimate for the Tampa study area (\$63,684) is 21% higher than the census 2000 average income of \$52,719
- Alternative indicators, such as the average income of new home buyers and the percent change in adjusted gross income, also suggest income change in the study area.

AVERAGE INCOME OF NEW HOME BUYERS: The average household income of individuals who received a home loan for purchase of a 1 to 4 unit structure intended as the primary residence (not rental or second home). The data is provided at the census tract level by the U.S. Department of Housing and Urban Development through the Home Mortgage Disclosure Act (HMDA). Social Compact utilizes the earliest available date (2003) and the latest available date (2006) to calculate the average household income and the percent change from the Census 2000 average income of neighborhood residents. Tract level data is adjusted to different geographies by weighting the number of home loans to the Census 2000 households at the block group level.

% CHANGE IN IRS ADJUSTED GROSS INCOME: The percent change in neighborhood adjusted gross income from 1998 to 2005. The data is provided by the Internal Revenue Service (IRS) at the zip code level. Social Compact utilizes the earliest available date (1998) and the latest available date (2005) to calculate percent change; 1998 values are adjusted for inflation to 2005 dollars. Zip code level data is adjusted to different geographies by weighting the number of returns to the Census 2000 households at the block group level. Decreases in the number of IRS Returns do not solely represent a decrease in population but may also reflect household changes resulting from individuals filing jointly, movement of seasonal and annual student populations, and other changes in the workforce.

Map 2. 2006 Homebuyers' Average Income
% Change from Census 2000 Average Income
by Census Tract



NOTE: Map depicts the percent difference from the average income of new homeowners (who purchased homes in 2006) to residents' average income as reported by Census 2000 by census tract.

Frequently Asked Questions

Q: What is the Tampa DrillDown?

A: The City of Tampa Neighborhood Market DrillDown is an assets-based market analysis conducted by Social Compact that combines numerous data sets, both public and private, national and local, in order to build a set of community economic indicators that are tailored to urban markets. These indicators can be used to more accurately describe the size (population), strength (income and buying power), stability (homeownership and residential investment) and investment opportunity of a given market.

Q: Who are the DrillDown partners?

A: The DrillDown was conducted by Social Compact in partnership with the City of Tampa Community and Economic Development Department.

Q: Who is the DrillDown for and how can they use it?

A: The DrillDown can serve as a resource to nonprofit and community organizations, local businesses, government and private sector decision makers. DrillDown indicators have been used to inform: current and future community and economic development initiatives; neighborhood revitalization plans; retail attraction and small business development; and expanding access to grocery providers and traditional banking and financial services.

Q: What is a DrillDown market profile?

A: DrillDown indicators are available in the form of a two-page detailed market profile, or “snapshot,” for individual neighborhood markets. To pre-view a DrillDown snapshot for the City of Tampa study area, please see page 10 of the DrillDown report.

Q: How is the DrillDown different from a traditional market analysis?

A: Traditional market analyses are often modeled from the decennial census, despite growing evidence that the census undercounts low-income and minority neighborhoods at a higher rate than their wealthier counterparts. This undercount contributes to the continued undervaluing of the economic potential of urban communities, many of them underserved. In contrast, rather than relying on any one dataset, the DrillDown indicators surface from a combined body of data from a wide spectrum of sources. Tested against the intuitive knowledge of local practitioners and business leaders in over 300 neighborhoods across the country, the DrillDown has a proven track record of accurately capturing market characteristics in small, dense, and rapidly changing urban geographies.

Q: What is the traditional market estimate?”

A: The traditional market estimate refers to the commercial market analytics, modeled from decennial census data, most commonly used by retailers and other development practitioners. Social Compact’s snapshots provide these estimates in addition to the DrillDown figures for purposes of comparison, often demonstrating the degree to which markets may be misrepresented by traditional analytics.

Q: Where can I get a copy of the Tampa DrillDown report?

A: The Tampa DrillDown report is available for download at Social Compact’s website: <http://www.socialcompact.org>.

Frequently Asked Questions continue on next page

Frequently Asked Questions

Q: What is a Community Redevelopment Area (CRA)?

A: The following definition is provided by the Florida Redevelopment Association; for more information, please visit their website at:
<http://www.redevelopment.net/crafaq.aspx>

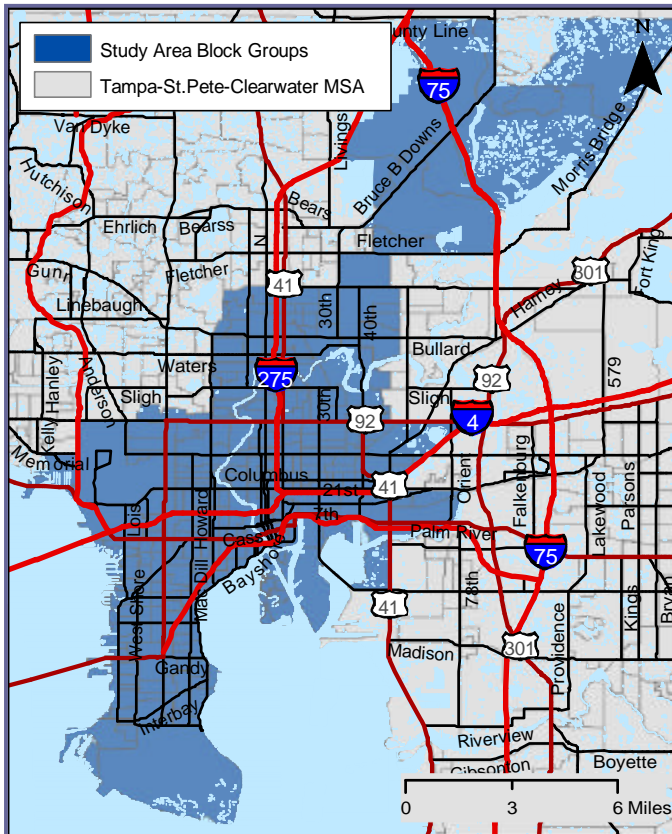
Under Florida law (Chapter 163, Part III), local governments are able to designate areas as Community Redevelopment Areas when certain conditions exist. Since all the monies used in financing CRA activities are locally generated, CRAs are not overseen by the state, but redevelopment plans must be consistent with local government comprehensive plans. Examples of conditions that can support the creation of a Community Redevelopment Area include, but are not limited to: the presence of substandard or inadequate structures, a shortage of affordable housing, inadequate infrastructure, insufficient roadways, and inadequate parking. To document that the required conditions exist, the local government must survey the proposed redevelopment area and prepare a Finding of Necessity. If the Finding of Necessity determines that the required conditions exist, the local government may create a Community Redevelopment Area to provide the tools needed to foster and support redevelopment of the targeted area.

There are currently 178 Community Redevelopment Areas in the State of Florida. The designation is used by Florida cities of all sizes, from Jacksonville and Tampa to Madison and Apalachicola. Many familiar locations, such as Church Street in Orlando, Ybor City in Tampa and the beachfront in Ft. Lauderdale are successful examples of Community Redevelopment Areas.

Tampa Study Area

DrillDown Market Overview

Social Compact Catalyzing Business Investment in Inner City Neighborhoods



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	346,037	340,026	309,058	1.8%
Population per Acre	3.9	3.9	3.5	
Total Households	142,710	141,635	127,550	0.8%
% Change in USPS Count	4% ('05-'07)			
% Change IRS Returns	9% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$63,805	\$60,927	\$52,719	4.7%
Median Household Income	\$45,834	\$44,961	\$38,796	1.9%
Aggregate Neighborhood Income	\$9.1 Billion	\$8.6 Billion	\$6.7 Billion	5.5%
% Informal Economy	6.1%			
Aggregate Income per Acre	\$103,729	(2 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$97,828	(86% above Census 2000 average income)		
% Change in Adj. Gross Income	18% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	56.2%	55.1%	55.3%	
% Owner Occupancy - Bldg	75.2%			
Median Home Sale Value	\$195,745	\$201,513	\$99,659	-2.9%
New Residential Units	5,864	46.0 per 1,000 households		
Residential Rehab Activity	24.4 % of residential buildings			
Change in Crime ('02 - '06)	-31% (Violent)	-39% (Property)	-38% (Total)	
Incidents per 1,000 Persons ('06)	10.5 (Violent)	59.8 (Property)	70.3 (Total)	

In partnership with the City of Tampa Department of Economic and Urban Development, Social Compact applied its Neighborhood Market DrillDown analysis citywide with a particular emphasis on Tampa's Community Redevelopment Areas (CRAs). The 2008 Tampa DrillDown serves as an additional information source that can aid local government, community and business leaders to uncover market strengths and opportunities in the City's underserved neighborhoods, attract investment to these areas and inform the City's comprehensive economic development agenda going forward. DrillDown study area neighborhoods include: Central Park CRA; Channelside CRA; Downtown CRA; Drew Park CRA; East Tampa CRA; Tampa Heights CRA; and Ybor CRA.

Tampa Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	19,057	\$.1 Billion	240,092	x \$2,787 / yr = \$669.1 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$4.4 Billion	\$2.3 Billion	-\$2.1 Billion	
Apparel	\$.3 Million	\$257.4 Million	\$257.0 Million	756,893
Grocery	\$862.8 Million	\$462.8 Million	-\$400.0 Million	0
Restaurants	\$722.3 Million	\$371.5 Million	\$370.8 Million	1,589,239

GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	119	8.3		\$462.8 Million		
Full Service Grocers Only	22	1.5	1.01 mi		-\$400.0 Million	0

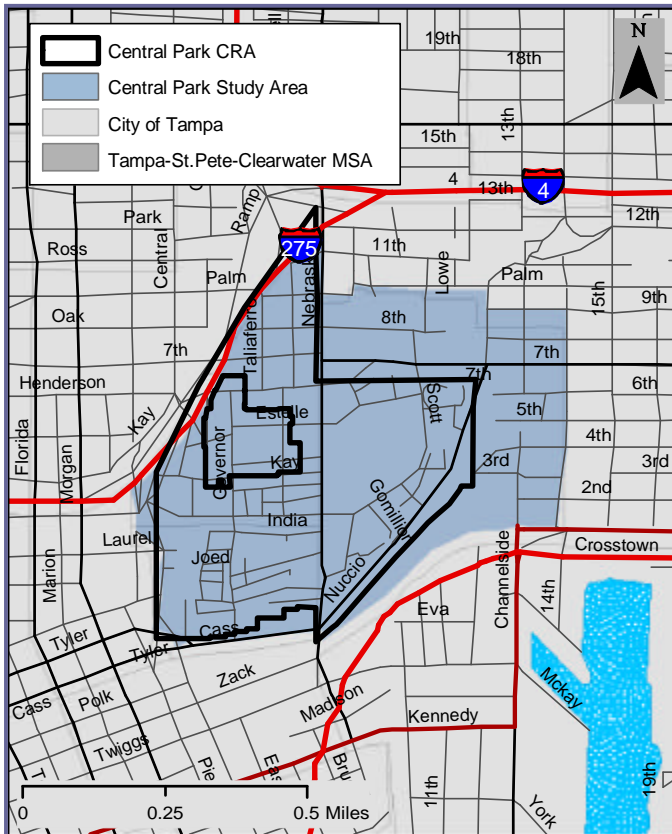
FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	131	9.2	
Banks Only	99	6.9	0.83 mi
Pawnshops, Checkcashers, Payday Lenders	120	8.4	1.18 mi
% of Households lacking credit histories = 16%			

SOCIAL COMPACT is a national not-for-profit corporation led by a board of business leaders whose mission is to help strengthen neighborhoods by stimulating private market investment in underserved communities. The lack of dependable business-oriented data on inner-city communities expands the information gap on market trends, disabling potential investors from making informed decisions. Established to provide up-to-date profiles of market size, strength, and stability for small, dense, and rapidly changing urban geographies, Social Compact's Neighborhood Market DrillDown addresses key barriers to private investment in and around inner-city neighborhoods - a lack of information and negative stereotyping. The DrillDown uses numerous sources of market data to identify the fundamental business attributes and market characteristics of urban communities and aims to expose market anomalies and opportunities that may have previously been overlooked by traditional market analyses. The DrillDown serves as a resource to community organizations, government decision makers and the private sector. Social Compact is at the forefront of identifying the market potential of underserved neighborhoods and believes that a public private partnership that involves community members and leverages private investment is the most sustainable form of community economic development.

Central Park Study Area

DrillDown Market Overview

Social Compact Catalyzing Business Investment in Inner City Neighborhoods



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	1,226	2,594	2,429	-52.7%
Population per Acre	5.0	10.7	10.0	
Total Households	417	914	857	-54.4%
% Change in USPS Count	-16% ('05-'07)			
% Change IRS Returns	21% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$26,499	\$24,371	\$20,273	8.7%
Median Household Income	\$12,607	\$14,075	\$11,699	-10.4%
Aggregate Neighborhood Income	\$11.1 Million	\$22.3 Million	\$17.4 Million	-50.4%
% Informal Economy	8.3%			
Aggregate Income per Acre	\$45,436	(1 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$92,737	(357% above Census 2000 average income)		
% Change in Adj. Gross Income	32% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	6.1%	3.8%	4.1%	
% Owner Occupancy - Bldg	3.6%			
Median Home Sale Value		\$70,119	\$37,738	
New Residential Units				
Residential Rehab Activity	0.9 % of residential buildings			
Change in Crime ('02 - '06)	-37% (Violent)	-51% (Property)	-46% (Total)	
Incidents per 1,000 Persons ('06)	42.0 (Violent)	72.5 (Property)	114.5 (Total)	

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Central Park Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	107	\$1 Million	1,986	x \$2,787 / yr = \$5.5 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$16.1 Million	\$4.1 Million	-\$12.0 Million	
Apparel	\$0 Million	\$4 Million	\$4 Million	1,293
Grocery	\$0	\$1.0 Million	\$1.0 Million	2,849
Restaurants	\$4.6 Million	\$6 Million	\$6 Million	2,631

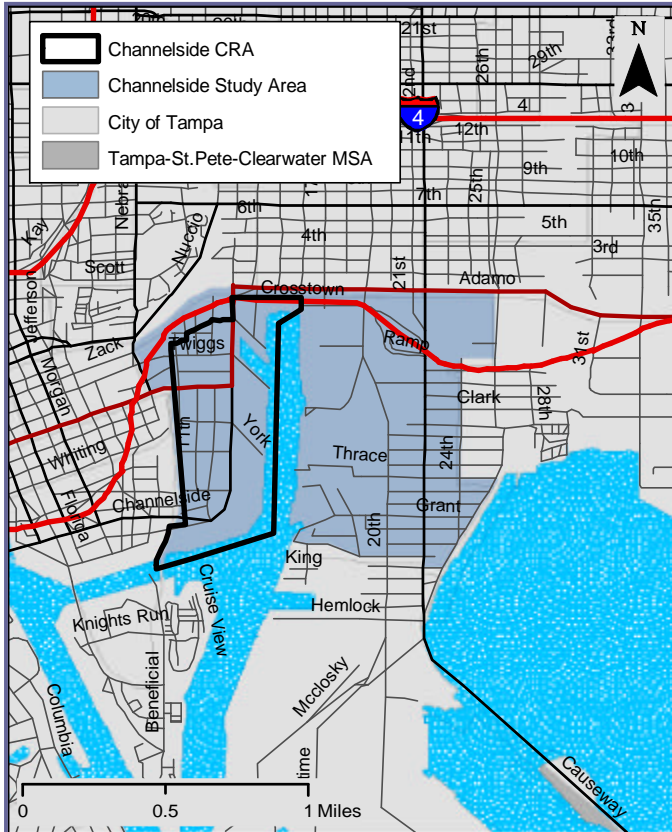
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	3	71.9		\$1.0 Million		
Full Service Grocers Only	0	0.0	1.19 mi		\$1.0 Million	2,849

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	0	0	
Banks Only	0	0	0.55 mi
Pawnshops, Checkcashers, Payday Lenders	2	48	0.24 mi
% of Households lacking credit histories = 30%			

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Channelside Study Area

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	2,095	1,004	962	108.7%
Population per Acre	3.1	1.5	1.4	
Total Households	757	360	347	110.4%
% Change in USPS Count	45% ('05-'07)			
% Change IRS Returns	0% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$57,410	\$42,813	\$35,881	34.1%
Median Household Income	\$37,528	\$34,773	\$30,156	7.9%
Aggregate Neighborhood Income	\$43.5 Million	\$15.4 Million	\$12.5 Million	182.1%
% Informal Economy	10.2%			
Aggregate Income per Acre	\$65,322	(2 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$97,089	(171% above Census 2000 average income)		
% Change in Adj. Gross Income	14% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	49.2%	65.8%	66.0%	
% Owner Occupancy - Bldg	58.0%			
Median Home Sale Value	\$175,000	\$116,042	\$55,000	50.8%
New Residential Units	3	8.6 per 1,000 households		
Residential Rehab Activity	11.7 % of residential buildings			
Change in Crime ('02 - '06)	-33% (Violent)	-18% (Property)	-20% (Total)	
Incidents per 1,000 Persons ('06)	20.8 (Violent)	138.3 (Property)	159.0 (Total)	

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Channelside Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	234	\$1 Million	2,864	x \$2,787 / yr = \$8.0 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$17.3 Million	\$11.1 Million	-\$6.1 Million	
Apparel	\$0 Million	\$1.2 Million	\$1.2 Million	3,654
Grocery	\$0	\$2.3 Million	\$2.3 Million	6,764
Restaurants	\$9.6 Million	\$1.8 Million	\$1.8 Million	7,627

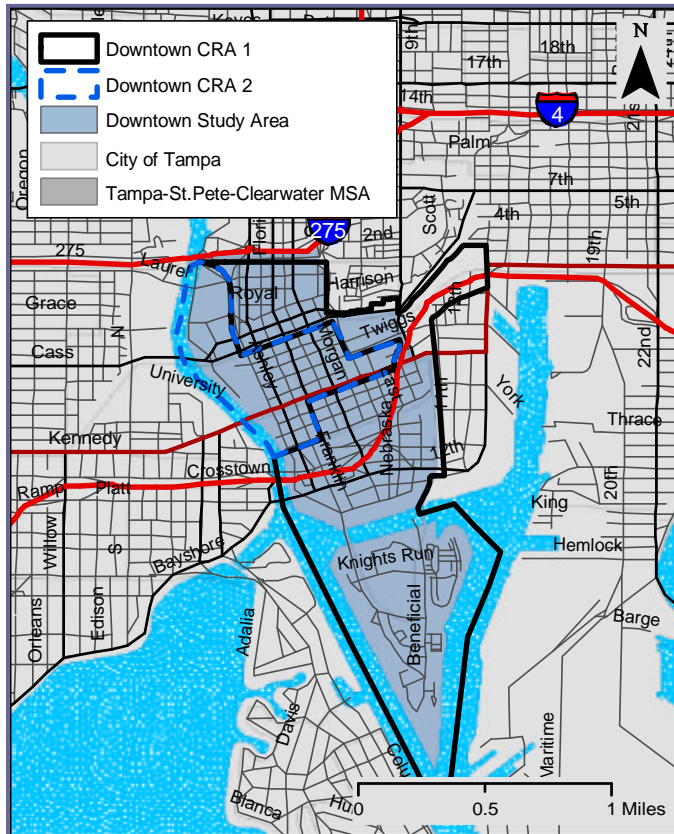
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	2	26.4		\$2.3 Million		
Full Service Grocers Only	0	0.0	1.3 mi		\$2.3 Million	6,764

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	1	13.2	
Banks Only	1	13.2	0.5 mi
Pawnshops, Checkcashers, Payday Lenders	0	0	1.04 mi
% of Households lacking credit histories = 30%			

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Downtown Study Area

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	5,757	3,720	2,235	54.8%
Population per Acre	7.3	4.7	2.8	
Total Households	3,347	2,141	1,277	56.3%
% Change in USPS Count	17% ('05-'07)			
% Change IRS Returns	43% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$120,723	\$109,630	\$99,249	10.1%
Median Household Income	\$73,552	\$36,854	\$28,809	99.6%
Aggregate Neighborhood Income	\$404.0 Million	\$234.7 Million	\$126.7 Million	72.1%
% Informal Economy	12.2%			
Aggregate Income per Acre	\$509,102	(12 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$180,022	(81% above Census 2000 average income)		
% Change in Adj. Gross Income	20% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	45.1%	35.5%	34.6%	
% Owner Occupancy - Bldg	74.9%			
Median Home Sale Value	\$302,000	\$110,143	\$56,172	174.2%
New Residential Units	9	7.0 per 1,000 households		
Residential Rehab Activity	7.8 % of residential buildings			
Change in Crime ('02 - '06)	-33% (Violent)	-53% (Property)	-51% (Total)	
Incidents per 1,000 Persons ('06)	26.8 (Violent)	185.7 (Property)	212.5 (Total)	

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Downtown Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	1,757	\$5 Million	26,875	x \$2,787 / yr = \$74.9 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$37.3 Million	\$74.6 Million	\$37.2 Million	
Apparel	\$0 Million	\$8.8 Million	\$8.8 Million	25,885
Grocery	\$0	\$13.4 Million	\$13.4 Million	39,147
Restaurants	\$29.0 Million	\$12.6 Million	\$12.6 Million	54,078

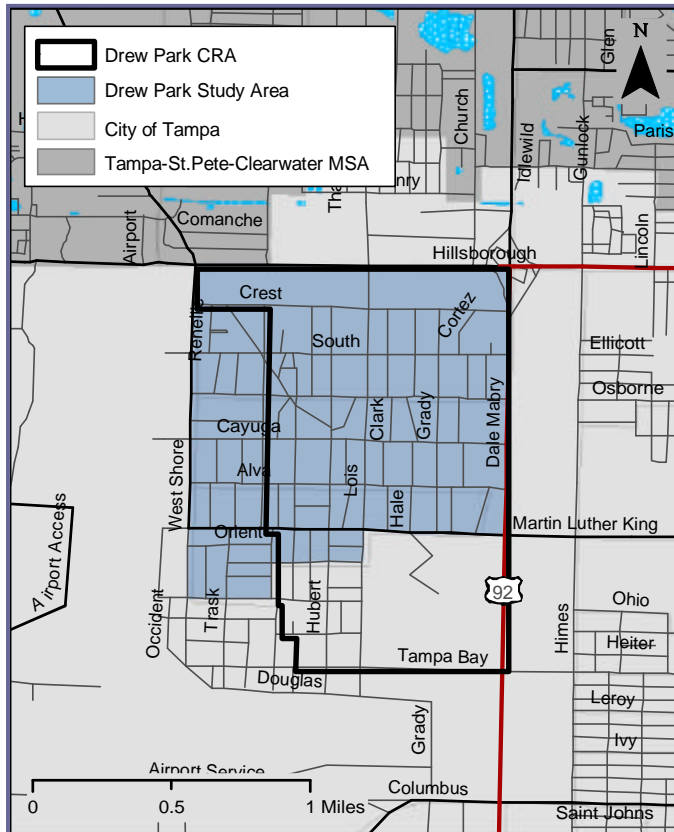
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	1	3.0		\$13.4 Million		
Full Service Grocers Only	0	0.0	0.65 mi		\$13.4 Million	39,147

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	18	53.8	
Banks Only	15	44.8	0.22 mi
Pawnshops, Checkcashers, Payday Lenders	4	12	0.36 mi
% of Households lacking credit histories = 28%			

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Drew Park Study Area

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	1,468	1,156	1,299	27.0%
Population per Acre	1.8	1.4	1.6	
Total Households	646	511	573	26.4%
% Change in USPS Count	3% ('05-'07)			
% Change IRS Returns	2% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$52,458	\$38,547	\$31,703	36.1%
Median Household Income	\$34,354	\$31,826	\$26,355	7.9%
Aggregate Neighborhood Income	\$33.9 Million	\$19.7 Million	\$18.2 Million	72.0%
% Informal Economy	17.5%			
Aggregate Income per Acre	\$42,012	(1 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$66,201	(109% above Census 2000 average income)		
% Change in Adj. Gross Income	-7% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	14.6%	18.0%	18.0%	
% Owner Occupancy - Bldg	27.5%			
Median Home Sale Value	\$255,000	\$98,486	\$51,018	158.9%
New Residential Units		#VALUE!		
Residential Rehab Activity	5.6 % of residential buildings			
Change in Crime ('02 - '06)	-47% (Violent)	-46% (Property)	-46% (Total)	
Incidents per 1,000 Persons ('06)	24.6 (Violent)	204.8 (Property)	229.4 (Total)	

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Drew Park Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	560	\$2 Million	6,528	x \$2,787 / yr = \$18.2 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$1.1 Billion	\$0.0 Billion	-\$0.1 Billion	
Apparel	\$0.0 Million	\$1.0 Million	\$1.0 Million	2,808
Grocery	\$0.0 Million	\$1.9 Million	\$1.9 Million	5,573
Restaurants	\$18.5 Million	\$1.4 Million	\$1.4 Million	5,999

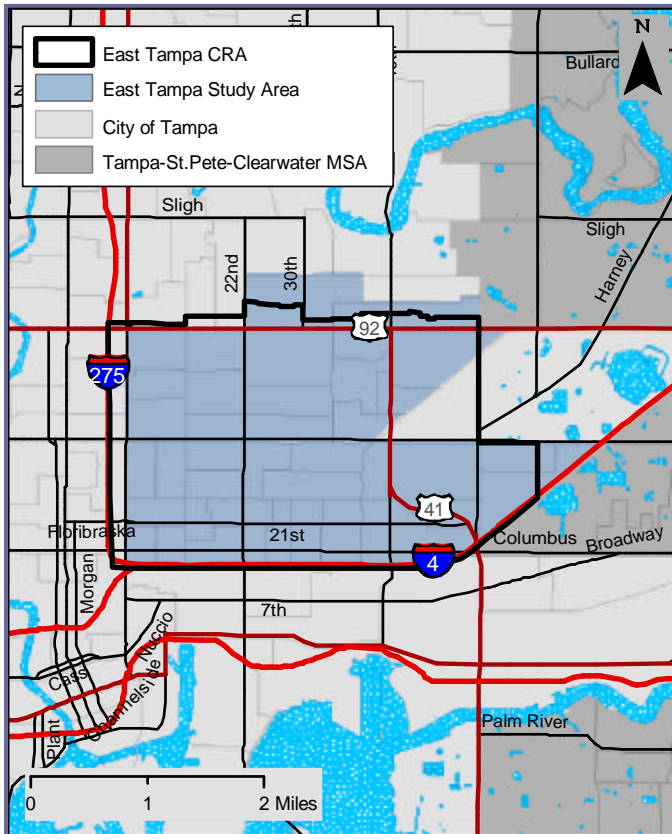
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	4	61.9		\$1.9 Million		
Full Service Grocers Only	0	0.0	1.59 mi		\$1.9 Million	5,573

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	2	31	
Banks Only	2	31	0.54 mi
Pawnshops, Checkcashers, Payday Lenders	4	61.9	1.7 mi
% of Households lacking credit histories = 54%			

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East Tampa Study Area

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	35,420	32,403	30,148	9.3%
Population per Acre	7.5	6.9	6.4	
Total Households	12,167	11,287	10,382	7.8%
% Change in USPS Count	8% ('05-'07)			
% Change IRS Returns	6% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$38,273	\$36,644	\$30,064	4.4%
Median Household Income	\$25,571	\$27,096	\$22,510	-5.6%
Aggregate Neighborhood Income	\$465.6 Million	\$413.6 Million	\$312.1 Million	12.6%
% Informal Economy	7.9%			
Aggregate Income per Acre	\$98,855	(2 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$51,176	(70% above Census 2000 average income)		
% Change in Adj. Gross Income	7% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	55.8%	61.2%	61.4%	
% Owner Occupancy - Bldg	65.4%			
Median Home Sale Value	\$137,000	\$108,166	\$54,115	26.7%
New Residential Units	652	62.8 per 1,000 households		
Residential Rehab Activity	17.4 % of residential buildings			
Change in Crime ('02 - '06)	-11% (Violent)	-16% (Property)	-15% (Total)	
Incidents per 1,000 Persons ('06)	24.8 (Violent)	96.4 (Property)	121.1 (Total)	

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East Tampa Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	1,057	\$3 Million	12,138	x \$2,787 / yr = \$33.8 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$225.0 Million	\$147.5 Million	-\$77.5 Million	
Apparel	\$0 Million	\$15.9 Million	\$15.9 Million	46,909
Grocery	\$61.8 Million	\$33.0 Million	-\$28.8 Million	0
Restaurants	\$18.4 Million	\$23.0 Million	\$23.0 Million	98,417

GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	20	16.4		\$33.0 Million		
Full Service Grocers Only	2	1.6	0.83 mi		-\$28.8 Million	0

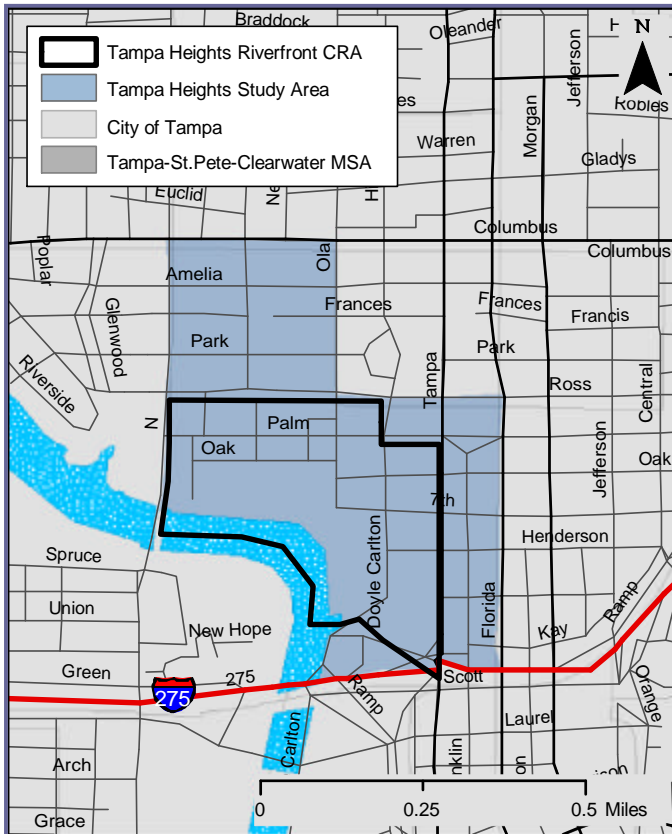
FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	4	3.3	
Banks Only	1	0.8	1.01 mi
Pawnshops, Checkcashers, Payday Lenders	13	10.7	0.99 mi
% of Households lacking credit histories = 14%			

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Tampa Heights Study Area

DrillDown Market Overview

Social Compact
Catalyzing Business Investment in Inner City Neighborhoods



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	540	514	476	5.0%
Population per Acre	3.4	3.2	3.0	
Total Households	199	193	177	3.1%
% Change in USPS Count	0% ('05-'07)			
% Change IRS Returns	43% ('98-'05)			
MARKET STRENGTH				
Average Household Income	\$30,997	\$24,456	\$20,567	26.7%
Median Household Income	\$20,000	\$18,958	\$15,500	5.5%
Aggregate Neighborhood Income	\$6.2 Million	\$4.7 Million	\$3.6 Million	30.7%
% Informal Economy	7.6%			
Aggregate Income per Acre	\$38,561	(1 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$83,004	(304% above Census 2000 average income)		
% Change in Adj. Gross Income	20% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	39.5%	63.2%	63.3%	
% Owner Occupancy - Bldg	54.9%			
Median Home Sale Value	\$197,500	\$153,947	\$72,576	28.3%
New Residential Units	17	96.0 per 1,000 households		
Residential Rehab Activity	17.3 % of residential buildings			
Change in Crime ('02 - '06)	-71% (Violent)	-56% (Property)	-59% (Total)	
Incidents per 1,000 Persons ('06)	16.8 (Violent)	123.9 (Property)	140.8 (Total)	

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Tampa Heights Study Area

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	53	\$0 Million	627	x \$2,787 / yr = \$1.7 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$4.8 Million	\$2.2 Million	-\$2.6 Million	
Apparel	\$0	\$2.2 Million	\$2.2 Million	702
Grocery	\$0	\$5.5 Million	\$5.5 Million	1,474
Restaurants	\$6.6 Million	\$3.3 Million	\$3.3 Million	1,456

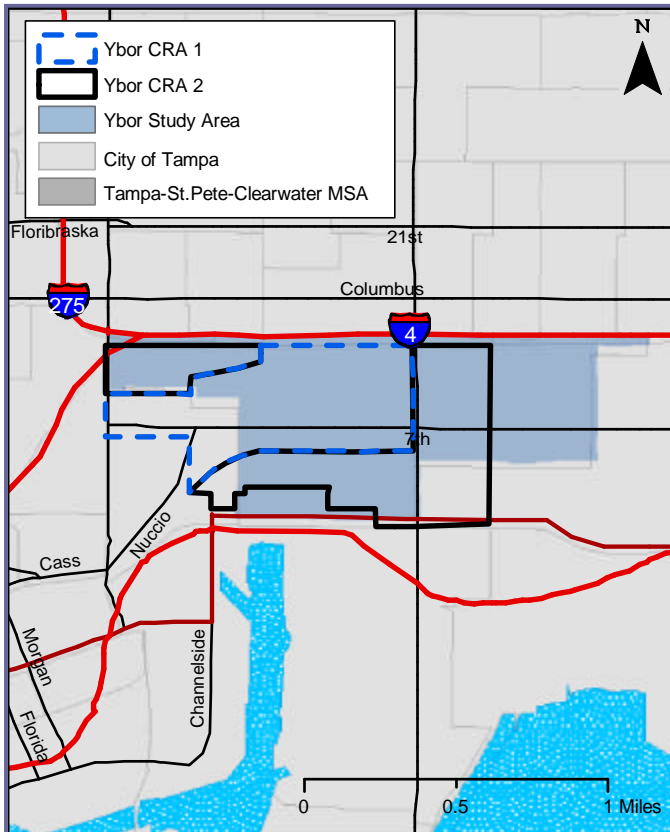
GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	0	0.0		\$5.5 Million		
Full Service Grocers Only	0	0.0	1.36 mi		\$5.5 Million	1,474

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	0	0	
Banks Only	0	0	0.89 mi
Pawnshops, Checkcashers, Payday Lenders	0	0	0.61 mi
% of Households lacking credit histories = 25%			

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Ybor Study Area

DrillDown Market Overview



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	1,909	1,685	1,372	13.3%
Population per Acre	4.3	3.8	3.1	
Total Households	1,003	852	681	17.8%
% Change in USPS Count	5% ('05-'07)			
% Change IRS Returns	0% (98-'05)			
MARKET STRENGTH				
Average Household Income	\$41,516	\$24,592	\$22,198	68.8%
Median Household Income	\$23,085	\$18,333	\$16,380	25.9%
Aggregate Neighborhood Income	\$41.7 Million	\$21.0 Million	\$15.1 Million	98.8%
% Informal Economy	11.3%			
Aggregate Income per Acre	\$92,983	(2 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$82,739	(273% above Census 2000 average income)		
% Change in Adj. Gross Income	14% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	22.6%	24.3%	25.7%	
% Owner Occupancy - Bldg	39.4%			
Median Home Sale Value	\$184,300	\$66,363	\$33,898	177.7%
New Residential Units	8	11.7 per 1,000 households		
Residential Rehab Activity	13.2 % of residential buildings			
Change in Crime ('02 - '06)	-48% (Violent)	-61% (Property)	-58% (Total)	
Incidents per 1,000 Persons ('06)	88.2 (Violent)	330.9 (Property)	419.1 (Total)	

In partnership with the City of Tampa Department of Economic and Urban Development, Social Compact applied its Neighborhood Market DrillDown analysis citywide with a particular emphasis on Tampa's Community Redevelopment Areas (CRAs). The 2008 Tampa DrillDown serves as an additional information source that can aid local government, community and business leaders to uncover market strengths and opportunities in the City's underserved neighborhoods, attract investment to these areas and inform the City's comprehensive economic development agenda going forward. DrillDown study area neighborhoods include: Central Park CRA; Channelside CRA; Downtown CRA; Drew Park CRA; East Tampa CRA; Tampa Heights CRA; and Ybor CRA.

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	344	\$1 Million	6,496	x \$2,787 / yr = \$18.1 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$35.2 Million	\$12.3 Million	-\$22.9 Million	
Apparel	\$.0 Million	\$1.4 Million	\$1.3 Million	3,954
Grocery	\$0	\$2.7 Million	\$2.7 Million	7,920
Restaurants	\$38.4 Million	\$1.9 Million	\$1.9 Million	8,111

GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	1	10.0		\$2.7 Million		
Full Service Grocers Only	0	0.0	1.72 mi		\$2.7 Million	7,920

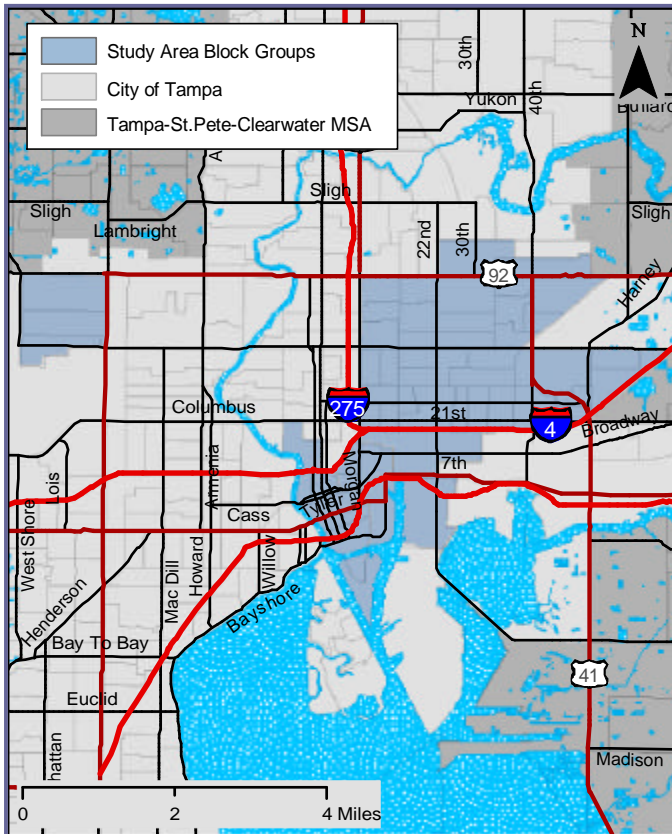
FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	2	19.9	
Banks Only	1	10	0.35 mi
Pawnshops, Checkcashers, Payday Lenders	0	0	1.14 mi
% of Households lacking credit histories = 16%			

SOCIAL COMPACT is a national not-for-profit corporation led by a board of business leaders whose mission is to help strengthen neighborhoods by stimulating private market investment in underserved communities. The lack of dependable business-oriented data on inner-city communities expands the information gap on market trends, disabling potential investors from making informed decisions. Established to provide up-to-date profiles of market size, strength, and stability for small, dense, and rapidly changing urban geographies, Social Compact's Neighborhood Market DrillDown addresses key barriers to private investment in and around inner-city neighborhoods - a lack of information and negative stereotyping. The DrillDown uses numerous sources of market data to identify the fundamental business attributes and market characteristics of urban communities and aims to expose market anomalies and opportunities that may have previously been overlooked by traditional market analyses. The DrillDown serves as a resource to community organizations, government decision makers and the private sector. Social Compact is at the forefront of identifying the market potential of underserved neighborhoods and believes that a public private partnership that involves community members and leverages private investment is the most sustainable form of community economic development.

CRA Study Area

DrillDown Market Overview

Social Compact Catalyzing Business Investment in Inner City Neighborhoods



*IRS Adjusted Gross Income adjusted for inflation

Tampa-St. Pete-Clearwater MSA Income per Acre = \$42,365

	2008 DRILLDOWN	2008 Traditional Est.	2000 Census	Comparison DrillDown/Trad. Est.
MARKET SIZE				
Total Population	48,414	43,076	38,921	12.4%
Population per Acre	6.2	5.5	5.0	
Total Households	18,536	16,258	14,294	14.0%
% Change in USPS Count	8% ('05-'07)			
% Change IRS Returns	9% (98-'05)			
MARKET STRENGTH				
Average Household Income	\$54,268	\$44,986	\$35,372	20.6%
Median Household Income	\$33,652	\$28,040	\$23,035	20.0%
Aggregate Neighborhood Income	\$1005.9 Million	\$731.4 Million	\$505.6 Million	37.5%
% Informal Economy	10.2%			
Aggregate Income per Acre	\$128,514	(3 times the Tampa-St. Pete-Clearwater MSA income per acre)		
Average Income New Home Buyers	\$90,486	(156% above Census 2000 average income)		
% Change in Adj. Gross Income	19% ('98-'05)			
MARKET STABILITY				
% Owner Occupancy - Unit	48.1%	51.4%	52.3%	
% Owner Occupancy - Bldg	61.4%			
Median Home Sale Value	\$176,947	\$105,522	\$53,099	67.7%
New Residential Units	689	48.2 per 1,000 households		
Residential Rehab Activity	15.4 % of residential buildings			
Change in Crime ('02 - '06)	-24% (Violent)	-34% (Property)	-32% (Total)	
Incidents per 1,000 Persons ('06)	28.0 (Violent)	113.3 (Property)	141.3 (Total)	

In partnership with the City of Tampa Department of Economic and Urban Development, Social Compact applied its Neighborhood Market DrillDown analysis citywide with a particular emphasis on Tampa's Community Redevelopment Areas (CRAs). The 2008 Tampa DrillDown serves as an additional information source that can aid local government, community and business leaders to uncover market strengths and opportunities in the City's underserved neighborhoods, attract investment to these areas and inform the City's comprehensive economic development agenda going forward. DrillDown study area neighborhoods include: Central Park CRA; Channelside CRA; Downtown CRA; Drew Park CRA; East Tampa CRA; Tampa Heights CRA; and Ybor CRA.

DrillDown Market Overview

BUSINESSES	Total #	Total Revenue	Total # Employees	Estimated Employee Annual Spending Potential
All Businesses	4,112	\$11 Million	57,514	x \$2,787 / yr = \$160.3 Million in employee spending

RETAIL DEMAND	Estimated Revenue	Resident Expenditures	Estimated Leakage	Estimated Sq. Ft. Potential
All Retail	\$425.5 Million	\$260.7 Million	-\$164.9 Million	
Apparel	\$0 Million	\$29.0 Million	\$28.9 Million	85,206
Grocery	\$61.8 Million	\$54.8 Million	-\$6.9 Million	0
Restaurants	\$119.1 Million	\$41.7 Million	\$41.6 Million	178,319

GROCERY DEMAND	Total #	# per 10K HH	Average Distance	Total Expenditures	Total Leakage	Estimated Sq. Ft. Potential
All Grocers	31	16.7		\$54.8 Million		
Full Service Grocers Only	2	1.1	0.91 mi		-\$6.9 Million	0

FINANCIAL SERVICES	Total #	# per 10K HH	Average Distance
Banks & Credit Unions	27	14.6	
Banks Only	20	10.8	0.79 mi
Pawnshops, Checkcashers, Payday Lenders	23	12.4	0.88 mi
% of Households lacking credit histories = 19%			

SOCIAL COMPACT is a national not-for-profit corporation led by a board of business leaders whose mission is to help strengthen neighborhoods by stimulating private market investment in underserved communities. The lack of dependable business-oriented data on inner-city communities expands the information gap on market trends, disabling potential investors from making informed decisions. Established to provide up-to-date profiles of market size, strength, and stability for small, dense, and rapidly changing urban geographies, Social Compact's Neighborhood Market DrillDown addresses key barriers to private investment in and around inner-city neighborhoods - a lack of information and negative stereotyping. The DrillDown uses numerous sources of market data to identify the fundamental business attributes and market characteristics of urban communities and aims to expose market anomalies and opportunities that may have previously been overlooked by traditional market analyses. The DrillDown serves as a resource to community organizations, government decision makers and the private sector. Social Compact is at the forefront of identifying the market potential of underserved neighborhoods and believes that a public private partnership that involves community members and leverages private investment is the most sustainable form of community economic development.

TOTAL POPULATION AND HOUSEHOLDS: The DrillDown assembles a list of residential addresses from municipal and proprietary tax assessment records, municipal building permit records, utility hookups, and credit bureau records. Households, also known as occupied units, are determined by multiplying the total number of residential addresses by the occupancy rate, determined through analysis of utility usage records, at the block group level. Total population is calculated by multiplying the number of households by the average household size and adding this number to the population in group quarters. Average household size and population in group quarters are provided at the block group level by the most recent census trend projections; group quarters population excludes individuals in correctional facilities.

POPULATION PER ACRE: The DrillDown total population estimate divided by the acreage of the study area. Land area measurements are obtained from the U.S. Census Bureau as the size, in square units (metric and nonmetric) of all areas designated as land in the Census Bureau's national geographic Topologically Integrated Geographic Encoding and Referencing (TIGER®) system.

% CHANGE IN USPS DELIVERY ADDRESSES: The change in the total number of residential and commercial addresses that the U.S. Postal Service (USPS) has recorded in their database excluding addresses identified as vacant (not collecting mail for 90 days or longer) or no-stat (not occupied). The data is provided by the U.S. Department of Housing and Urban Development (HUD) on a quarterly basis at the census tract level. Social Compact utilizes the earliest available count (2005) and the latest available count (2007) to calculate the percent change. Tract level data is adjusted to different geographies by weighting the number of postal counts to the Census 2000 households at the block group level.

% CHANGE IN IRS RETURNS: The change in the total number of tax returns received by the Internal Revenue Service. The data is provided by the Internal Revenue Service (IRS) at the zip code level. Social Compact utilizes the earliest available count (1998) and the latest available count (2005) to calculate percent change; 1998 values are adjusted for inflation to 2005 dollars. Zip code level data is adjusted to different geographies by weighting the number of returns to the Census 2000 households at the block group level.

AVERAGE HOUSEHOLD INCOME: Utilizing credit bureau income estimates, Social Compact calculates the income distribution, or the number of households per income bracket, for a given geography. The average income at the block group level is calculated by applying the U.S. Bureau of Labor and Statistics Consumer Expenditure Survey (CEX) estimated average income for individuals within a particular income bracket (projected from 2004 to 2006) to the income distribution determined. The DrillDown average household income estimate is then adjusted to include the proportion of neighborhood income attributed to informal economic activity.

MEDIAN HOUSEHOLD INCOME: Utilizing credit bureau income estimates, Social Compact calculates the income distribution, or the number of households per income bracket, for a given geography. The median household income is the income of the household that divides the number of upper-income and lower-income households into two equal parts.

AGGREGATE NEIGHBORHOOD INCOME: Utilizing credit bureau income estimates, Social Compact calculates the income distribution, or the number of households per income bracket, for a given geography. The aggregate income is calculated as the sum of the total number of households in each income bracket multiplied by the average household income for that income bracket. The DrillDown aggregate neighborhood income estimate is then adjusted to include the proportion of neighborhood income attributed to informal economic activity.

AGGREGATE NEIGHBORHOOD INCOME PER ACRE: The aggregate neighborhood income divided by the total acreage of the study area. Land area measurements are obtained from the U.S. Census Bureau as the size, in square units (metric and nonmetric) of all areas designated as land in the Census Bureau's national geographic Topologically Integrated Geographic Encoding and Referencing (TIGER®) system.

% INFORMAL ECONOMY: An estimate of the proportion of neighborhood income attributed to informal economic activity. By weighting the following proxies, the DrillDown estimates the monetary value of unregulated economic activity: households with income below \$30,000; difference between household income and household expenditures; the percentage of households with no credit record; the percentage of utility payments made in cash; the number of nontraditional financial service providers per household and per acre; the difference between estimated housing costs and real home values; and the percent foreign born population. The DrillDown average household income estimate is adjusted to include the proportion of neighborhood income attributed to informal economic activity; median household income is not. For more information on the informal economy estimate, please see Social Compact's Frequently Asked Questions, available for download at www.socialcompact.org.

DrillDown glossary continues on next page

AVERAGE INCOME OF NEW HOME BUYERS: The average household income of individuals who received a home loan for purchase of a 1 to 4 unit structure intended as the primary residence (not rental or second home). The data is provided at the census tract level by the U.S. Department of Housing and Urban Development through the Home Mortgage Disclosure Act (HMDA). Social Compact utilizes the earliest available date (2003) and the latest available date (2006) to calculate the average household income and the percent change from the Census 2000 average income of neighborhood residents. Tract level data is adjusted to different geographies by weighting the number of postal counts to the Census 2000 households at the block group level.

% CHANGE IN IRS ADJUSTED GROSS INCOME: The percent change in neighborhood adjusted gross income from 1998 to 2005. The data is provided by the Internal Revenue Service (IRS) at the zip code level. Social Compact utilizes the earliest available date (1998) and the latest available date (2005) to calculate percent change; 1998 values are adjusted for inflation to 2005 dollars. Zip code level data is adjusted to different geographies by weighting the number of returns to the Census 2000 households at the block group level.

OWNER OCCUPANCY BY UNIT: An estimate of the proportion of residential units where the property owner is a resident. Social Compact determines owner occupancy by matching a street address with a property owner's mailing address provided by proprietary real estate data and municipal tax assessor records.

OWNER OCCUPANCY BY BUILDING: An estimate of the proportion of residential buildings where the property owner is a resident. Social Compact determines owner occupancy by matching a street address with a property owner's mailing address provided by proprietary real estate data and municipal tax assessor records. Social Compact considers a building as owner occupied if, for buildings five units or less, at least one unit is owner occupied, and, for larger buildings, more than 50% of the units are owner occupied.

MEDIAN HOME SALE VALUE: Median home sale value is calculated at the neighborhood level using property transaction data from property sales and both proprietary and municipal real estate data over an 18 month period. The median home sale value is the value of the home that divides the number of higher-valued and lower-valued homes into two equal parts.

NEW RESIDENTIAL UNITS: The total number of reported new residential units resulting from new construction as determined through an assessment of project descriptions obtained from municipal building permit records for the stated period of time. The DrillDown reports the rate of new construction, or the total number of new residential units per 1,000 households, as a means of comparison across neighborhoods.

RESIDENTIAL REHAB ACITVITY: The proportion of residential buildings that have undergone reported additions, alterations, and/or repairs to an existing structure, as determined through an assessment of project descriptions obtained from municipal building permit records for the stated period of time.

CRIME: Social Compact examines crime data at the block group level, as part of its neighborhood risk and stability analysis. Crime statistics, obtained from local police records, are gathered longitudinally to assess trends in documented criminal activity over time. In order to maintain consistency across comparisons of time and geography, Social Compact uses population and household counts from Census 2000 and not current DrillDown estimates; and employs the Federal Bureau of Investigation's (FBI) Uniform Criminal Reporting (UCR) coding to define property and violent crime (see below). Unless otherwise stated, trends are reported for the start of the earliest year through the end of the latest year for which data was obtained (i.e. "2002 – 2006" is equivalent to January 1 2002 – December 31 2006). **VIOLENT CRIME** includes reported incidents of murder, forcible rape, robbery, and aggravated assault (in accordance with FBI UCR coding). **PROPERTY CRIME** includes reported incidents of arson, burglary, larceny/theft, and motor vehicle theft (in accordance with FBI UCR coding).

ALL EMPLOYERS: An indicator of an area's business climate (total businesses, revenue) and daytime population (number of employees). The total number of businesses (including non-profit and community based organizations, educational institutions and churches), total revenue (annual sales revenue) and total employees are based on listings provided by ESRI Business Analyst and/or InfoUSA.

DrillDown glossary continues on next page

ESTIMATED EMPLOYEE ANNUAL SPENDING POTENTIAL: Based on the International Council of Shopping Centers (ICSC) Office Worker Spending Patterns (2004), Social Compact applies the estimated average expenditures on meals and services of a downtown office worker (\$2,787/yr) to the total number of employees in an area, based on InfoUSA business listings. While this indicator can provide an estimate of the annual spending potential of an area's daytime population, it does not include other visitor and tourist spending.

ALL RETAIL: Based on listings provided by ESRI Business Analyst, InfoUSA and/or ACNielsen, Social Compact calculates the total number of retail businesses for the study area. Retail businesses are considered establishments organized to sell merchandise in small quantities to the general public. Social Compact further subdivides its retail analysis based on the following categories: apparel and grocers. The sum of these categories is not necessarily the total of all retail businesses.

APPAREL (RETAILERS): Retail business establishments organized to sell merchandise in small quantities to the general public primarily engaged in retailing a general line of men's, women's and children's clothing and accessories (hats, shoes, etc.).

ALL GROCERS: All food retailers that sell food for home consumption and preparation (supermarkets, corner stores, convenience stores, etc.) based on listings provided by ESRI Business Analyst, Info USA, and/or AC Nielsen. This category does not include restaurants, carry-out establishments, etc.

FULL SERVICE GROCERS: Food retailers of 20 or more employees that sell food for home consumption and preparation; based on listings provided by ESRI Business Analyst, InfoUSA, and/or AC Nielsen. This category may include food retailers with less than 20 employees if products from each and all of the following categories are regularly available: fruits, vegetables, dairy, meat, and breads. This category does not include restaurants, carry-out establishments, etc.

RESTAURANTS: All business establishments primarily engaged in providing food services to patrons.

ESTIMATED REVENUE: The annual sales revenues for retail businesses based on listings provided by ESRI Business Analyst, InfoUSA and/or ACNielsen.

RESIDENT EXPENDITURES: Social Compact calculates residents' retail expenditures, based on household income, through an analysis of average consumer spending on goods and services provided by the most recent Consumer Expenditure Survey (CE). The CE is a national account conducted by the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor and administered by the Census Bureau. The CE expenditure categories are then matched to corresponding North American Industry Classification System (NAICS) codes for existing retail businesses. For more information on the CE and NAICS, please see Social Compact's Frequently Asked Questions, available for download at www.socialcompact.org.

ESTIMATED LEAKAGE: An estimate derived through subtracting annual sales revenue from residents' annual aggregate expenditures. Leakage is presented as a dollar amount that is meant to identify the gap between available retail within the neighborhood and the retail spending of residents themselves. A positive leakage number means residents' expenditures exceed retail business revenues in the study area, suggesting unmet demand. A negative leakage number means retail business revenues exceed residents' aggregate expenditures. This may indicate the presence of a shopping district or other retail destination or may be the result of significant visitor or tourist retail spending. Thus, an estimate of zero or negative leakage does not necessarily imply that neighborhoods are sufficiently retailed, rather that particular demand is not revealed through broad aggregate numbers. For more information on leakage, please see Social Compact's Frequently Asked Questions, available for download at www.socialcompact.org.

ESTIMATED SQUARE FOOT POTENTIAL: The total square feet of retail space the estimated leakage could potentially support; based on the International Council of Shopping Center's (ICSC) national estimates of retail revenue per square foot for grocery and apparel retailers and restaurants. This figure is not available for all retailers.

BANKS & CREDIT UNIONS: Also referred to as "traditional financial service institutions," based on listings provided by the Federal Deposit Insurance Corporation (FDIC), 2007.

PAWNSHOPS, CHECK CASHERS, PAYDAY LENDERS: Also referred to as "nontraditional financial service institutions," based on listings provided by ESRI Business Analyst and/or InfoUSA.

DrillDown glossary continues on next page

AVERAGE DISTANCE: Represents the average of the distance in miles from each census block group center to the nearest establishment (irrespective of neighborhood boundaries). This assessment includes establishments in the study area and up to two miles beyond the study area boundary. In the case that an establishment is located on or just beyond the neighborhood boundaries used in the DrillDown analysis, this indicator serves as a more accurate determinant of residents' access to these services.

% of HOUSEHOLDS LACKING CREDIT HISTORIES: A percentage of households lacking an associated record with any of the three credit bureaus (Axiom, Equifax, and Experian); this indicator serves as a proxy for underbanked households.

GENERAL DRILLDOWN DATA SOURCES: Acxiom Corporation, 2008; Claritas, 2008; Bureau of Labor Statistics, Consumer Expenditure Survey 2004; Equifax Corporation, 2008 Experian Corporation, 2008; ESRI Business Analyst; Federal Deposit Insurance Corporation, 2007; First American CoreLogic, 2008; InfoUSA, 2008; Internal Revenue Service (IRS), 1998 and 2005; Home Mortgage Disclosure Act (HMDA), 2003 through 2006; Social Compact Analysis, 2008; U.S. Census Bureau, Census 2000; U.S. Department of Labor, 2004; municipal data.

APPENDIX 6 and APPENDIX 7:

STATE AND LOCAL REDEVELOPMENT AND INFRASTRUCTURE INCENTIVES

The availability of any incentive program listed herein is dependent upon the funding agency. Program guidelines, criteria, and funding resources may change at any time. Please see the appropriate agency for current program policies and funding.

JOB CREATION/TARGET INDUSTRY INCENTIVES

One of the rationales for stimulating catalytic redevelopment is to generate jobs. However, given the size of East Tampa, more employment centers of various sizes, are needed. Programs that are designed to stimulate job creation of large and small businesses district-wide are noted. These programs are just a start. Additional programs, marketing strategies, and one-on-one interaction with the development community are recommended to further promote job creation within the CRA.

Qualified Target Industry Tax Refund Program (QTI) [state funding]

The Qualified Target Industry (QTI) Tax Refund is a tool available to Florida communities to encourage quality job growth in targeted high value-added businesses. Pre-approved applicants who create jobs in Florida receive tax refunds of \$3,000 per net new full-time equivalent Florida job created; \$6,000 in an Enterprise Zone. For businesses paying 150 percent of the average annual wage, add \$1,000 per job; for businesses paying 200 percent of the average annual salary, add \$2,000 per job. New or expanding businesses in selected targeted industries or corporate headquarters are eligible. If approved, the applicant may receive refunds on the taxes it pays.

High Impact Performance Incentive Grant (HIPI) [state funding]

The High Impact Performance Incentive Grant is a negotiated incentive to attract and grow major high impact facilities in Florida. In order to participate in the program, a company must be in a designated high-impact sector; create at least 100 new full-time equivalent jobs (if a R&D facility, create at least 75 new full-time equivalent jobs) in Florida in a three-year period; and make a cumulative investment in the state of at least \$100 million (if a R&D facility, make a cumulative investment of at least \$75 million) in a three-year period. Once recommended by Enterprise Florida, Inc. (EFI) and approved by OTTED, the high impact business is awarded 50 percent of the eligible grant upon commencement of operations and the balance of the awarded grant once full employment and capital investment goals are met.

Capital Investment Tax Credit (CITC) [state funding]

The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax. Eligible projects are those in designated high-impact portions of the following sectors: biomedical technology, financial services, information technology, silicon technology, and transportation equipment manufacturing. Projects must also create a minimum of 100 jobs and invest at least \$25 million in eligible capital costs. Eligible capital costs include all expenses incurred in the acquisition, construction, installation, and equipping of a project from the beginning of construction to the commencement of operations.

Premier Business Bonus Program [county funding]

Local incentive grant offered by Hillsborough County and used in conjunction with Florida's QTI program. Available to qualified applicants creating new high-wage job opportunities, with exceptionally high wages and capital investment, either by expanding an existing business within the County or by bringing a new business to the County.

JOB TRAINING

The State of Florida offers the Incumbent Worker Training and Quick Response Training Programs. Both are primarily focused on increasing skills of Florida employees in order to keep businesses within the state competitive nationally. Since their creation, both programs have trained over 150,000 employees state-wide.

Incumbent Worker Training Program (IWT) [state funding]

Incumbent Worker Training is a program that provides training to currently employed workers to keep Florida's workforce competitive in a global economy and to retain existing businesses. The program is available to all Florida businesses that have been in operation for at least one year prior to application and require training for existing employees. Businesses must provide a matching contribution to the project. Funding priority will be given to businesses:

- With 25 employees or less;
- Located in distressed inner-city areas;
- In qualified targeted industries;
- Whose grant proposals represent a significant layoff avoidance strategy; or
- Whose grant proposals represent a significant upgrade in employee skills.

Quick Response Training (QRT) [state funding]

This is a customer-driven training program designed as an inducement to secure new value-added businesses to Florida as well as provide existing businesses the necessary training for expansion. Customized entry level skills training is limited to 24 months or less and can be conducted at the business' own facility, at the training provider's facility or at a combination of sites that best meets the needs of the business. Eligible projects are new or

expanding/existing Florida businesses that produce exportable goods or services, create new permanent, full-time jobs and employ Florida workers who require customized entry-level skills training.

BENEFICIAL TAX INCENTIVES

Many of the incentives for promoting redevelopment in CRAs relate to beneficial tax incentives. The following programs/exemptions may be used to help stimulate various redevelopment opportunities in East Tampa.

Capital Investment Tax Credit [state funding]

The Capital Investment Tax Credit is used to attract and grow capital-intensive industries in Florida. It is an annual credit, provided for up to twenty years, against the corporate income tax. Eligible projects are those in designated high-impact portions of the following sectors: biomedical technology, financial services, information technology, silicon technology, transportation equipment manufacturing, or be a corporate headquarters facility. Projects must also create a minimum of 100 jobs and invest at least \$25 million in eligible capital costs. Eligible capital costs include all expenses incurred in the acquisition, construction, installation, and equipping of a project from the beginning of construction to the commencement of operations.

Urban Job Tax Credit [state funding]

The Urban Job Tax Credit Program was developed to encourage the creation of jobs in urban areas of Florida. It provides tax credits to eligible businesses that are located within urban areas that hire a specific number of employees. In the Tampa Urban Area, the credit is \$1,000 per qualified job and can be taken against either the Florida Corporate Income Tax or the Florida Sales and Use Tax, but not both.

New Market Tax Credits (NMTC) Program [federal funding]

The New Markets Tax Credit (NMTC) Program permits taxpayers to receive a credit against Federal income taxes for making qualified equity investments in designated Community Development Entities (CDEs). Substantially all of the qualified equity investment must in turn be used by the CDE to provide investments in low-income communities. Brownfields cleanup and redevelopment projects often fall under these NMTC qualifications.

Machinery and Equipment Sales Tax Exemption [state funding]

This exemption was established to aid new and expanding businesses that use machinery and equipment at a particular location to manufacture, process, compound, or produce tangible personal property for sale or for exclusive use in spaceport activities.

Silicon Technology Sales and Use Tax Exemption [state funding]

To encourage silicon technology industries to establish operations in Florida, a tax exemption is offered to businesses that produce silicon products, such as silicon wafers or semiconductor chips, or are engaged in silicon research and development.

Qualified Defense Contractor Tax Refund Program (QDC) [state funding]

This program provides refunds for defense contractors for activities including consolidating defense contracts, acquiring new contracts, or converting operations to civilian production.

Electricity & Steam Tax Exemption [state funding]

Electricity exemptions are offered if it is used directly and exclusively at a fixed location to operate machinery and equipment that is used to manufacture items of tangible personal property for sale, or to operate pollution control equipment, recycling equipment, maintenance equipment, or monitoring or control equipment used in such operations.

Enterprise Bond Program [state funding]

This program offers tax-exempt, low interest bond financing to qualified manufacturing and 501(c) 3 nonprofit organizations through Florida Development Finance Corporation. This program was designed to improve low cost capital availability to Florida's manufacturers and non profit companies that qualify for tax exempt finance under IRS rules, allowing these companies to be more competitive in the global and domestic market place.

HISTORIC PRESERVATION TAX INCENTIVE PROGRAM

In 1992, the Florida state constitution was amended to allow municipalities the option of offering ad valorem tax exemptions on improvements to historic properties. In September 1993, the City of Tampa adopted Ordinance #93-137 creating such a tax exemption. The properties which qualify for the exemption are those designated as local landmarks or as contributing properties in a local historic district. The Barrio Latino Commission (BLC) reviews applications for exemptions for those properties within the Ybor City Historic District. The Architectural Review Commission (ARC) reviews applications for exemptions for properties in any other locally designated historic district in the city and for any locally designated landmark in the city. There are a number of tax incentives available to encourage the restoration and preservation of historic properties. In order to encourage the redevelopment and preservation of historic structures, a ten-year ad valorem tax exemption and federal preservation tax credit assistance is available to qualifying properties within the Ybor City Historic District. In addition, State of Florida Historic Preservation Grants and Federal Historic Preservation Tax Credits may also be available.

City of Tampa-Hillsborough County Historic Preservation Ad Valorem Tax Exemption Program

Owner-occupied or income-producing historic properties are eligible for a 10-year ad valorem tax exemption equal to the taxes that would be owed on the increased value of the

property that results from its rehabilitation. Rehabilitation must meet the same standards required for the federal tax credits.

City of Tampa's Interstate Historic Preservation Trust Fund's Low-Interest Loan and Grant Program

This program provides funds to property owners within historic districts for low-interest loans up to \$200,000. The program also provides grants for homeowners within a historic district for homes that are more than 75 years old.

KEY INCENTIVES/FUNDING SOURCES

ASSISTANCE TO AFFORDABLE HOUSING DEVELOPERS

The following programs/funding sources are available to developers of affordable single and multi-family projects. Eligibility requirements and funding mechanisms vary, however, the intent of assisting development of affordable housing remains consistent.

Low Income Housing Tax Credits (LIHTC) [federal funding]

The Low-Income Housing Tax Credit (LIHTC) is the most important resource for creating affordable housing in the United States today. It provides for-profit and nonprofit organizations with a dollar-for-dollar reduction in federal tax liability in exchange for the acquisition and substantial rehabilitation, substantial rehabilitation or new construction of affordable rental housing units. Special consideration is given to properties that target specific demographic groups such as the elderly, homeless people, farm workers and commercial fishing workers. Consideration is also given to properties that target specific geographic areas such as urban infill areas and Front Porch Florida communities.

Community Investment Program (CIP) [federal funding]

The Community Investment Program, which is available on a continuous basis through Federal Home Loan Bank (FHLB) member institutions, provides for flexible loan structuring, with rates 15 to 20 basis points lower than regular advance rates. The purpose of the Community Investment Program (CIP) is to provide loan funds for the following:

- home purchases by families with incomes at or below 115 percent of the area median,
- the purchase or rehabilitation of rental housing for families with incomes at or below 115 percent of the area median,
- commercial and economic development activities that benefit low- and moderate-income families (those at or below 80 percent of median income) or activities that are located in low- and moderate- income neighborhoods,
- projects that include a combination of these activities

Affordable Housing Program (AHP) [federal funding]

The AHP is a competitive program that provides grants twice a year through financial institutions for investment in low- or moderate-income housing initiatives. Member banks partner with developers and community organizations to finance the purchase,

construction, or rehabilitation of owner-occupied or rental housing. Grants can also be used to lower the interest rate on loans or cover down payment and closing costs. The program is flexible so that AHP funds can be used in combination with other programs and funding sources, ensuring a project's feasibility.

- AHP grants can be used to fund housing for families or individuals with incomes at or below 80% of the area median.
- For AHP funded rental housing, 20% of the units must serve households with incomes at or below 50% of the area median.

HOME Investment Partnership Program [federal funding]

The HOME Investment Partnerships Program provides non-amortized, low interest loans to developers for acquisition and/or new construction or rehabilitation of affordable rental housing to low-income families. Loans are offered for the financing of first or subordinate mortgages with a simple interest rate of zero (0) percent to nonprofit applicants and three (3) percent per annum interest rate to for-profit applicants. Loan terms are generally for 15 years for rehabilitation and 20 years for new construction. Since 1992-93, the city has received approximately \$2 million of HOME entitlement funds annually.

Community Development Block Grant Program (CDBG) [federal funding]

Since 1975, the City of Tampa has received approximately \$4 million per year from this program which is used to fund a variety of capital improvements, housing-related activities and social services.

HUD Section 811/202 [federal funding]

Section 811 and 202 provide long-term financing for disabled and elderly rental housing.

Housing Credits [state funding]

The Housing Credit (HC) program provides for-profit and nonprofit organizations with a dollar-for-dollar reduction in federal tax liability in exchange for the acquisition and substantial rehabilitation, substantial rehabilitation, or new construction of low and very low-income rental housing units. Qualifying buildings include garden, high-rise, townhouses, duplexes/quads, single family or mid-rise with an elevator.

State Apartment Incentive Loan (SAIL) [state funding]

SAIL provides low-interest loans on a competitive basis to affordable housing developers each year. This money often serves to bridge the gap between the development's primary financing and the total cost of the development. A minimum of twenty (20) percent of the development's units must be set aside for families earning fifty (50) percent or less of the area median income. Developments that use housing credits in conjunction with this program may use a minimum set-aside of forty (40) percent of the units for residents earning sixty (60) percent of the area median income. In most cases, the SAIL loan cannot exceed twenty five (25) percent of the total development cost.

Florida Affordable Housing Guarantee [state program]

The Florida Affordable Housing Guarantee Program encourages affordable housing lending by issuing guarantees on financing for affordable housing. This program provides guarantees on taxable and tax-exempt bonds, and creates a security mechanism that allows lenders to sell affordable housing loans in the secondary market. It also encourages affordable housing lending activities that would not otherwise take place.

Multifamily Mortgage Revenue Bonds (MMRB) [state funding]

MMRB uses both taxable and tax-exempt bonds to provide below market-rate loans to non-profit and for-profit developers who set aside a certain percentage of their apartment units for low income families. These bonds are sold through either a competitive or negotiated method of sale or private placement. The program requires that at least twenty (20) percent of the units be set aside for households earning at or below fifty (50) percent of the area median income (AMI). The developer may also opt to set aside forty (40) percent of the units for households earning at or below sixty (60) percent of the AMI.

State Housing Initiatives Partnership Program Grant (SHIP) [state funding]

The SHIP Program fosters public-private partnerships in order to create and preserve affordable housing. A minimum of sixty five (65) percent of the funds must be spent on eligible homeownership activities. A minimum of seventy five (75) percent of funds must be spent on eligible construction activities; at least thirty (30) percent of the funds must be reserved for very low income households (up to fifty (50) percent of the area median income or AMI); an additional 30 percent may be reserved for low income households (up to eighty percent of AMI); and the remaining funds may be reserved for moderate-income households (up to one hundred twenty percent of AMI). Funds may be used for activities that include, but are not limited to: Emergency repairs

- New construction
- Rehabilitation
- Down payment and closing cost assistance
- Impact fees
- Construction and gap financing
- Mortgage buy-downs
- Acquisition of property for affordable housing
- Matching dollars for federal housing grants and programs
- Homeownership counseling

Pre development Loan Program (PLP) [state funding]

Through individualized technical assistance and flexible below market interest financing for predevelopment activities, the Predevelopment Loan Program (PLP) helps nonprofit and community based organizations, local governments, and public housing authorities plan, finance, and develop affordable housing. Eligible organizations may apply for a loan of up to \$500,000. The loan carries a non-amortizing one to three percent interest rate, with

principal and interest deferred until maturity. The loan generally matures either upon the closing of construction/permanent financing or three years after the original PLP loan closed, whichever occurs first.

Elderly Housing Community Loan (EHCL) [state funding]

The Elderly Housing Community Loan (EHCL) program provides loans of up to \$750,000 to developers that are making substantial improvements to elderly housing. These funds are available for the purpose of making building preservation, sanitation repairs or improvements required by federal, state or local regulation codes, or life safety or security related improvements. The terms of the loan include a one (1) percent simple interest which is deferred until maturity. The principal plus any deferred interest is due at loan maturity, and the maximum term of the loan should not exceed 15 years. The applicant is required to match at least five (5) percent of the loan amount to pay the cost of the proposed repairs or improvements.

APPENDIX 8: EXAMPLE OF TIF REIMBURSEMENT SCHEDULE

Based on a review of TIF reimbursement incentives in other Florida communities, a hypothetical reimbursement schedule is listed below as an example. An incentive schedule for the East Tampa Business Expansion/Renovation Incentive Program will be developed as the program is created and policies developed.

- Year 1: 90% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.
- Year 2: 70% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.
- Year 3: 50% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.
- Year 4: 30% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.
- Year 5: 10% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.
- Year 6 and Beyond: 0% reimbursement of municipal property tax on incremental real property assessment increase using a portion of the TIF revenue generated by the business expansion/renovation.

APPENDIX 9:

WHAT IS TIF - TAX INCREMENT FINANCING (TIF)

ESTABLISHING A TIF / HOW TIF'S FUNCTION

Tax Increment Financing (TIF) is a source of funds that has become one of the most important economic development tools available to cities across the country.

Ad valorem taxes (property tax) are calculated by multiplying the assessed value (established by the County Property Assessor) of a property by the millage rates of the various taxing districts (e.g. the County, City, and/or Port). The County collects those taxes, calculates how much each taxing district is entitled to, and conveys the appropriate amount to each district. This tax revenue is the "T" in TIF. For owners of property within a TIF, the assessed value, millage rates, and property taxes paid are exactly the same if the CRA/TIF did not exist.

When the CRA is created, a "base year" is designated for the purpose of establishing a Base Year Assessed Value for the TIF. For the duration of the TIF, all taxing districts continue to receive their tax revenue as calculated on this Base Year Assessed Value. Over the course of time, with effective reinvestment strategies by CRA management and new private sector investment, the property values in the CRA will increase. By subtracting the Base Year Assessed Value from the current year's increased assessed value, we calculate the difference and this difference is known as Increment – the "I" in TIF. Generally, schools, libraries, and other taxing districts that depend exclusively on *ad valorem* taxes for their funding are not captured by this increment.

The County calculates the annual TIF funds for each CRA by multiplying the Increment of the CRA by the millage rates of the applicable taxing districts – the "F" in TIF. By *Florida State Statutes*, the County conveys ninety five (95%) percent of the calculated TIF funds to the City for deposit into a designated trust account established specifically for the CRA in which the TIF revenue is generated. Therefore, TIF funds are actually trust funds that must be spent exclusively within the CRA in which the tax revenue is generated. After thirty years, the TFI expires and all *ad valorem* taxes are released to the taxing districts thereafter.

TIF ELIGIBLE EXPENDITURES

Florida State Statute 163.370(3) provides a description of the type of expenditures TIF funds may or may not be used. While the Statute is written broadly to allow each

jurisdiction to determine what investments are most needed in their communities, there is a specific list of expenditures allowed and prohibited.

Specifically Allowed Expenditures

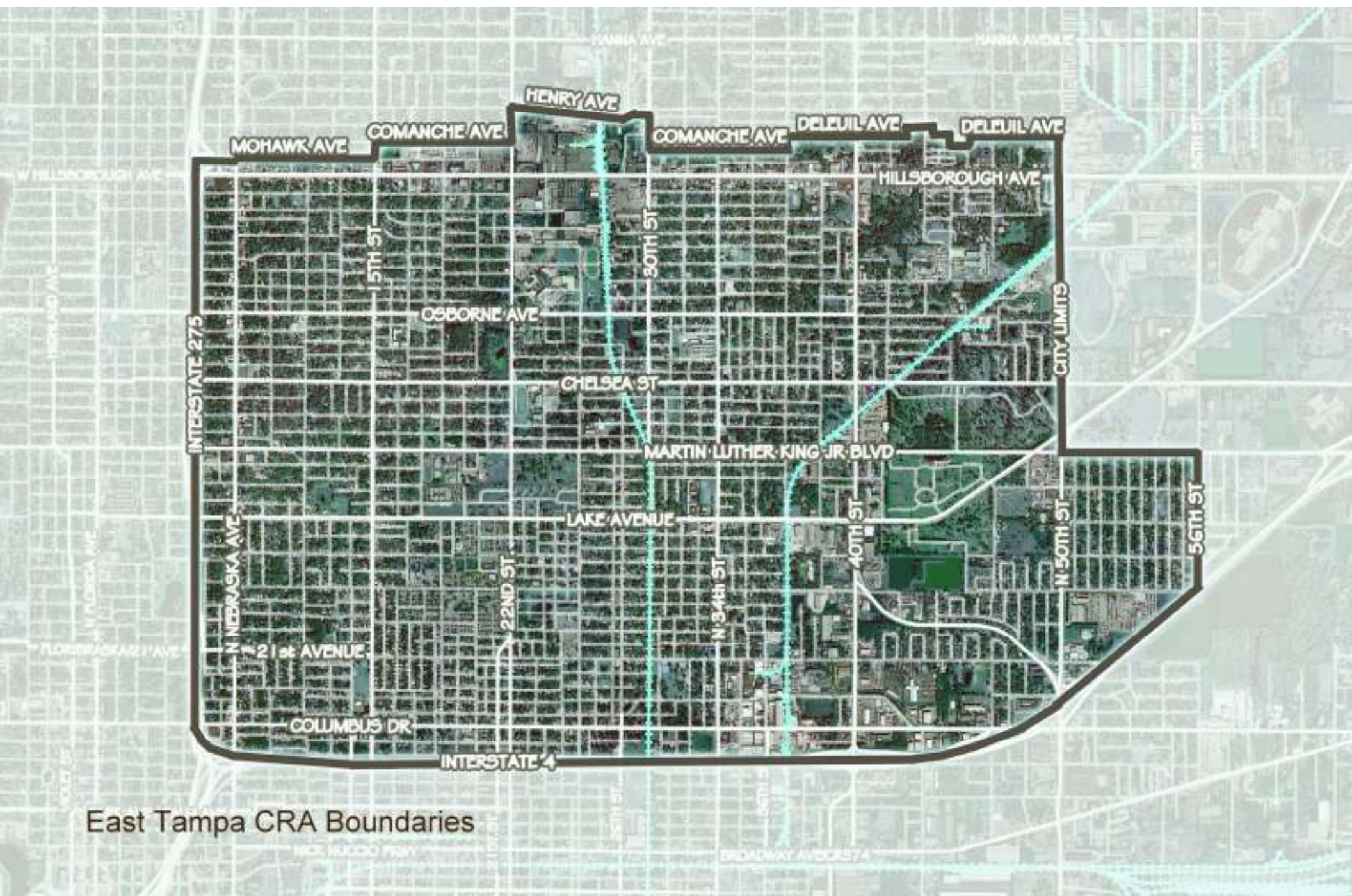
- Administration and overhead necessary to the implementation of a CRA Plan.
- Planning, surveys, and financial analysis, including the reimbursement for such expenses incurred before the CRA Plan was approved and adopted.
- The acquisition of real property.
- Clearance and preparation of land parcels for redevelopment and relocation of site occupants within or outside the CRA.
- The repayment of principal and interest for loans, bonds, or other form of indebtedness.
- All expenses incidental to securing loans or other forms of financing, including funding of reserves provided for in the ordinance authorizing such indebtedness.
- The development of affordable housing within the CRA.
- The development of community policing innovations.

Specifically Prohibited Expenditures

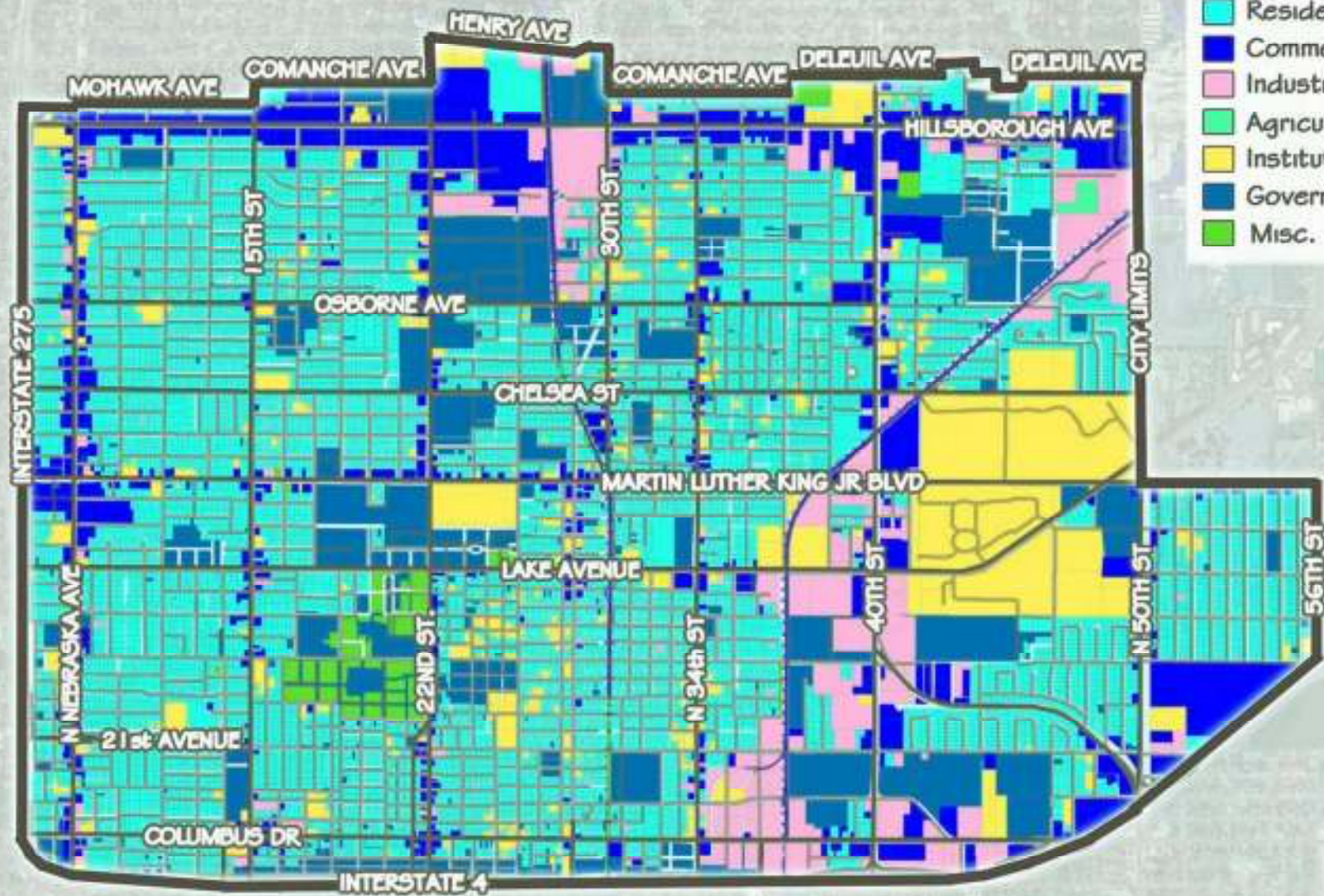
- Construction of administrative buildings or police and fire buildings, unless the construction is part of a community policing innovation.
- General government operating expenses unrelated to implementing the CRA Plan.
- Paying for capital improvements that were in the local government's capital budget within three years prior to the adoption of the CRA Plan that created the CRA.

APPENDIX 10

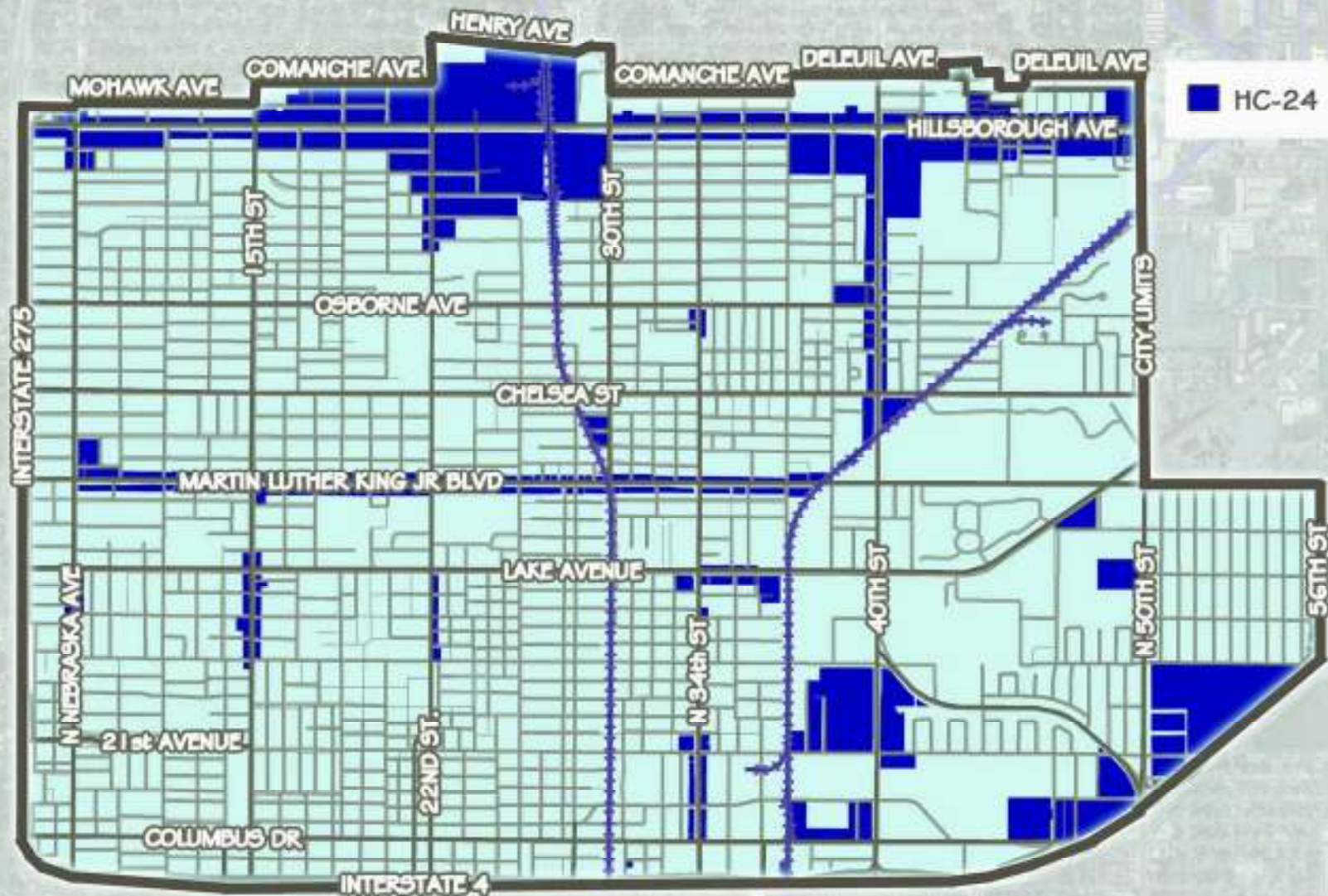
INFRASTRUCTURE/ASSET ANALYSIS



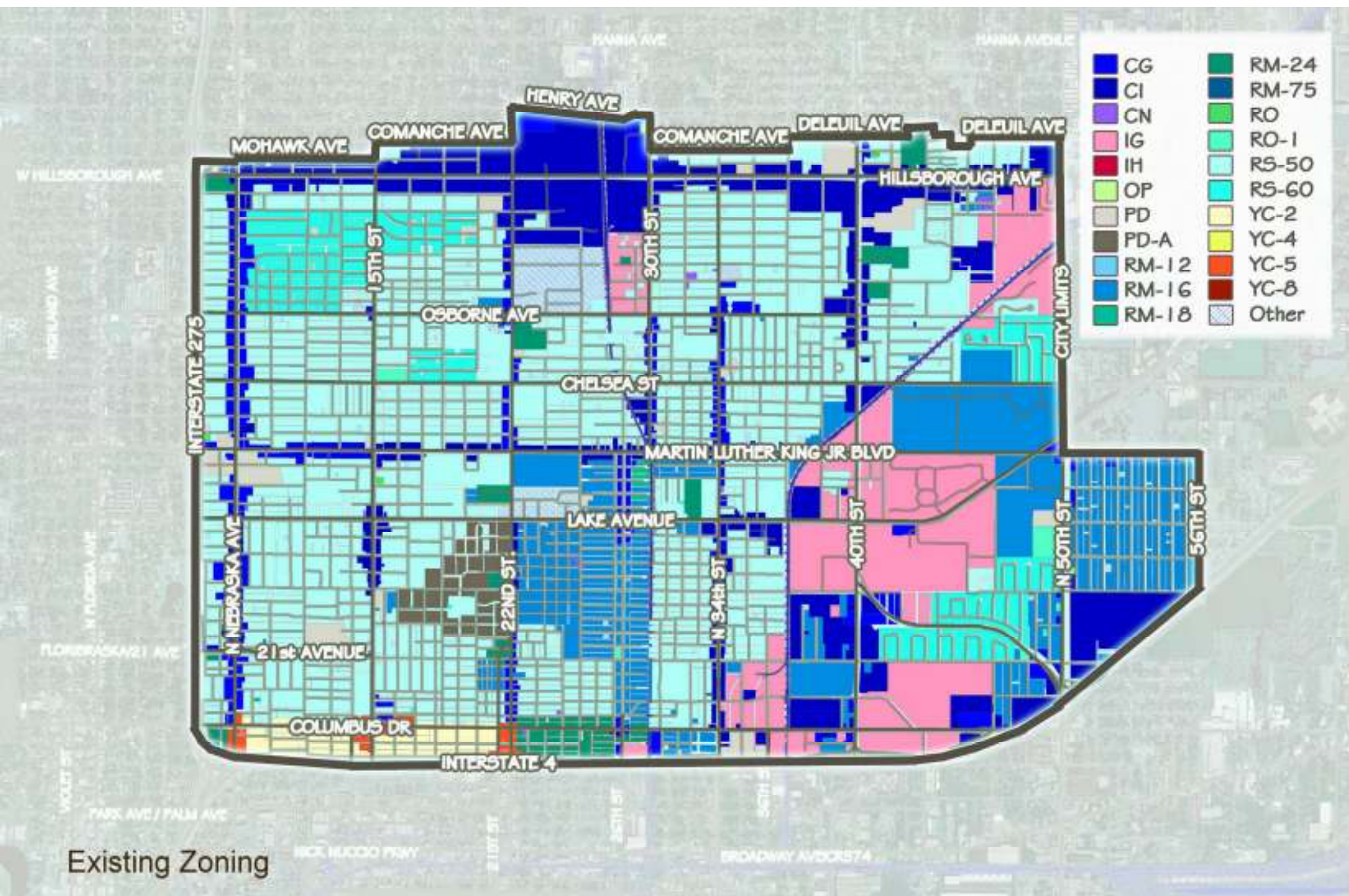
East Tampa CRA Boundaries

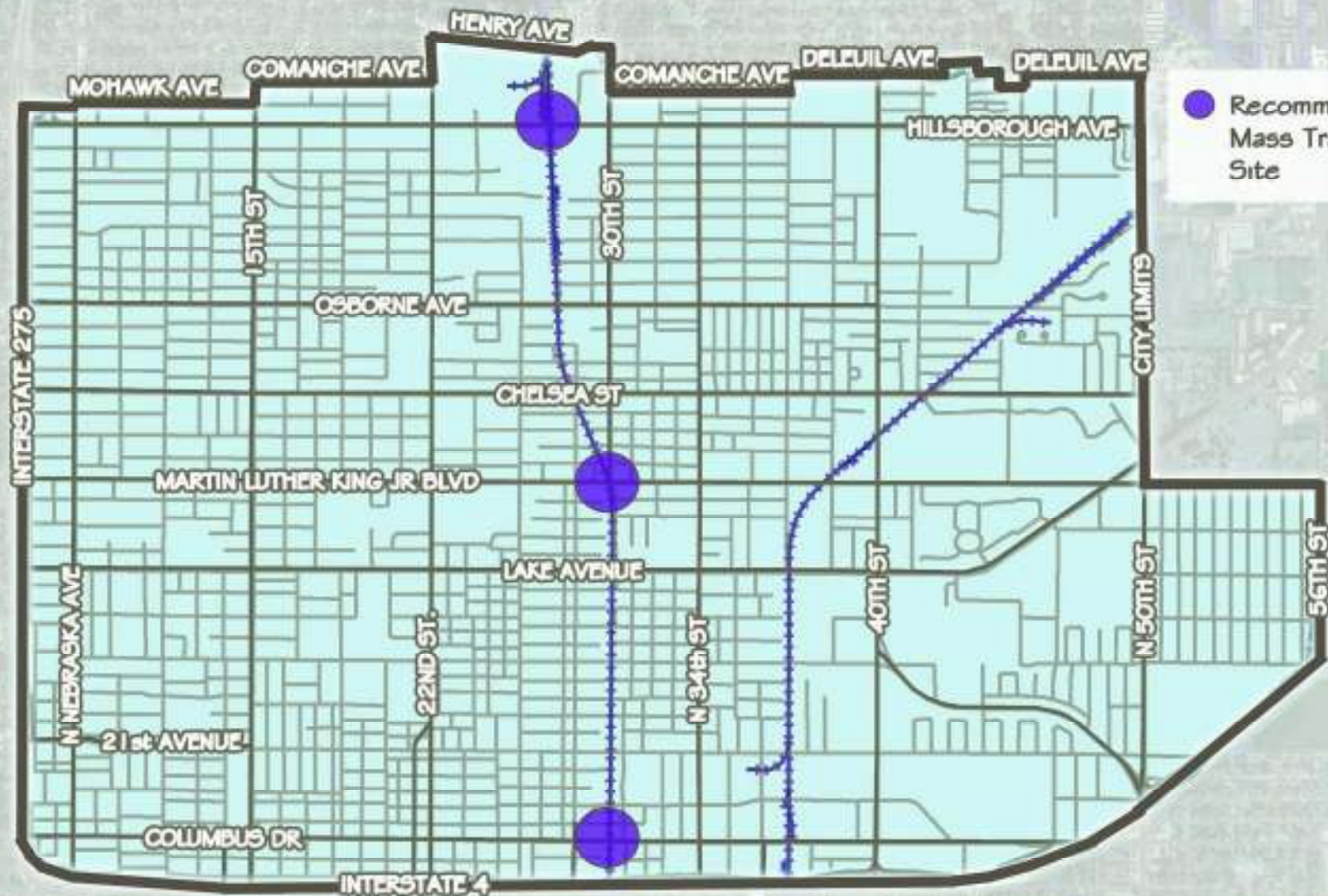


Existing Land Use by Department of Revenue code



Areas Currently Designated HC-24

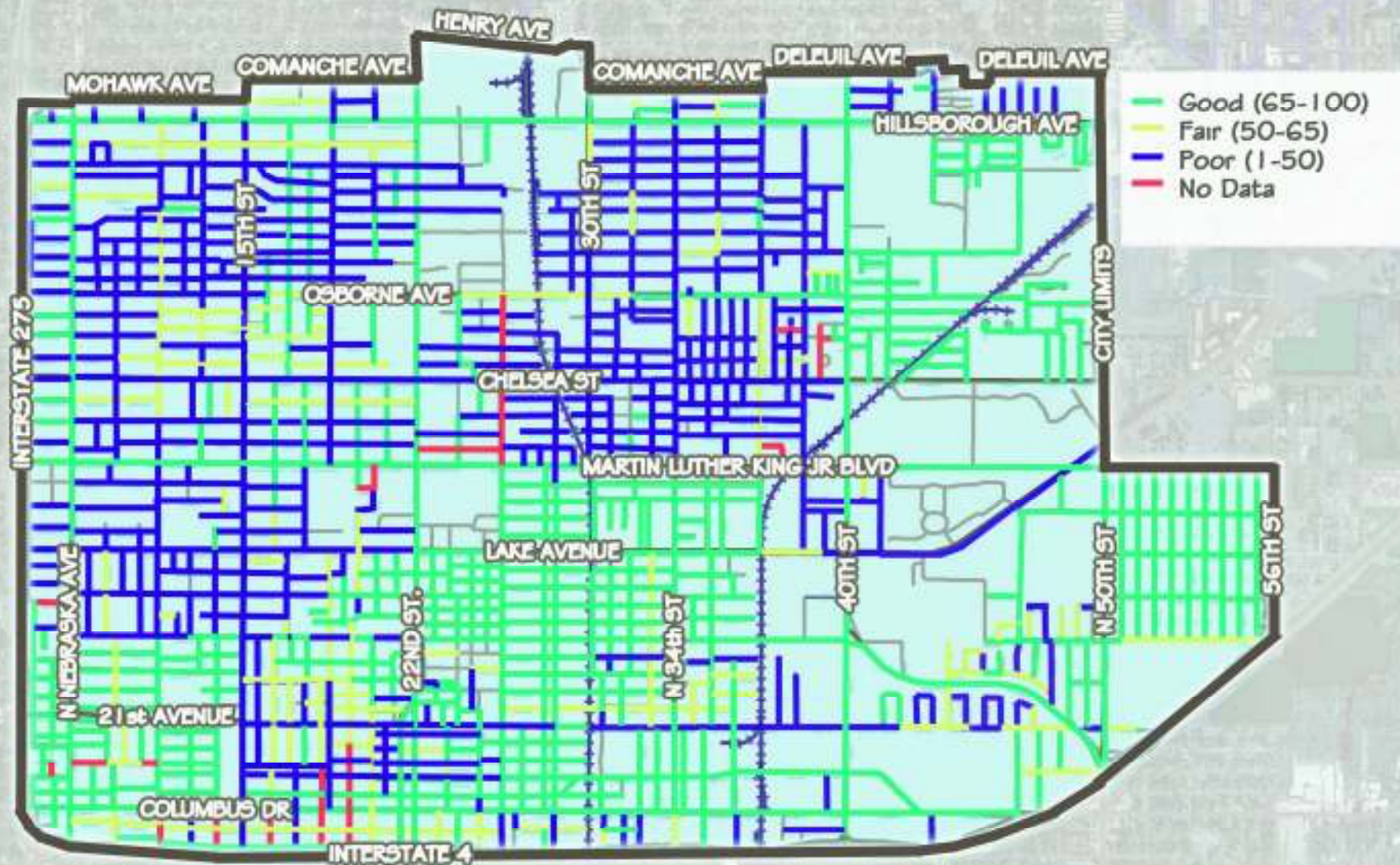




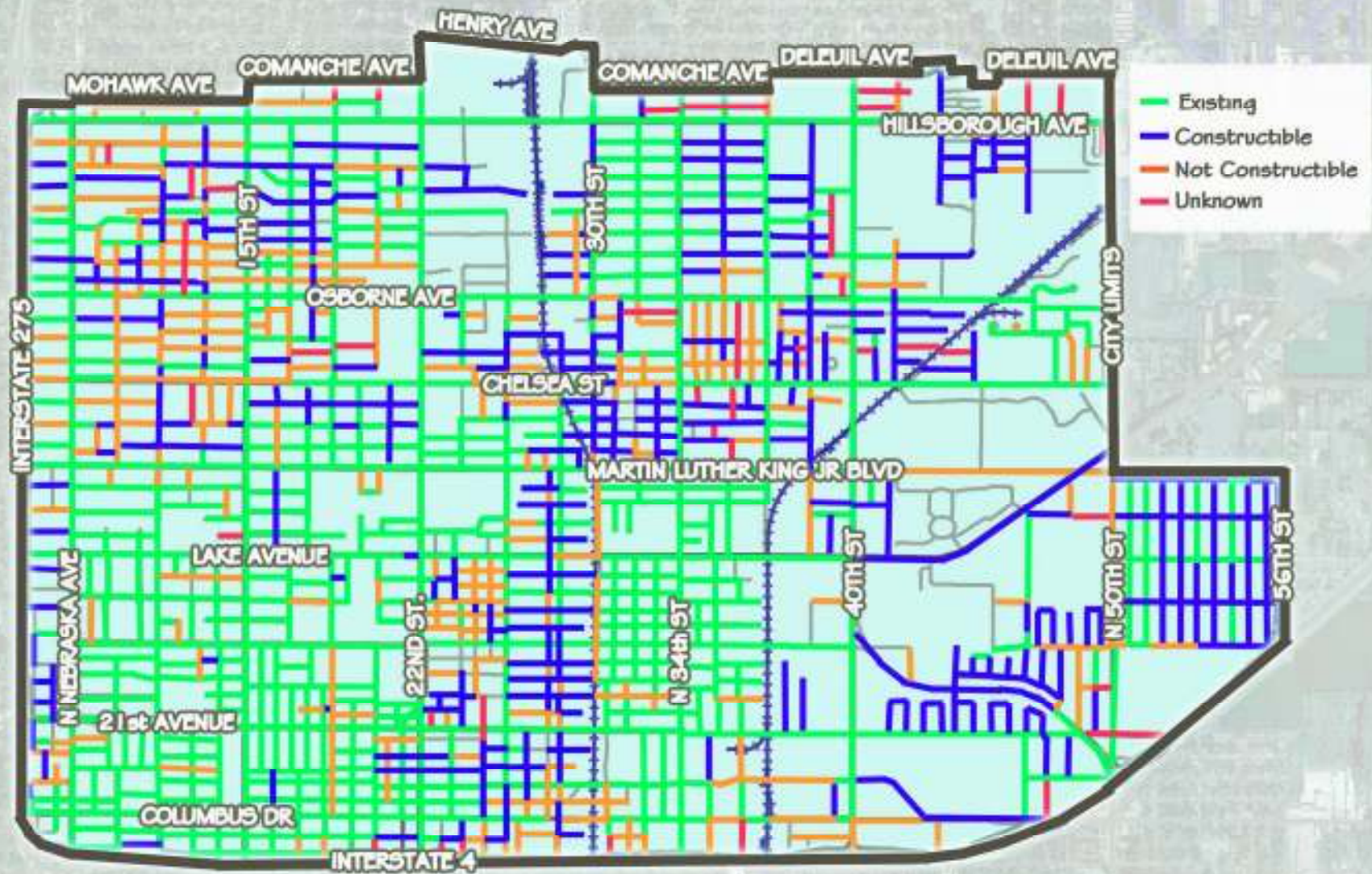
Recommended Mass Transit Sites



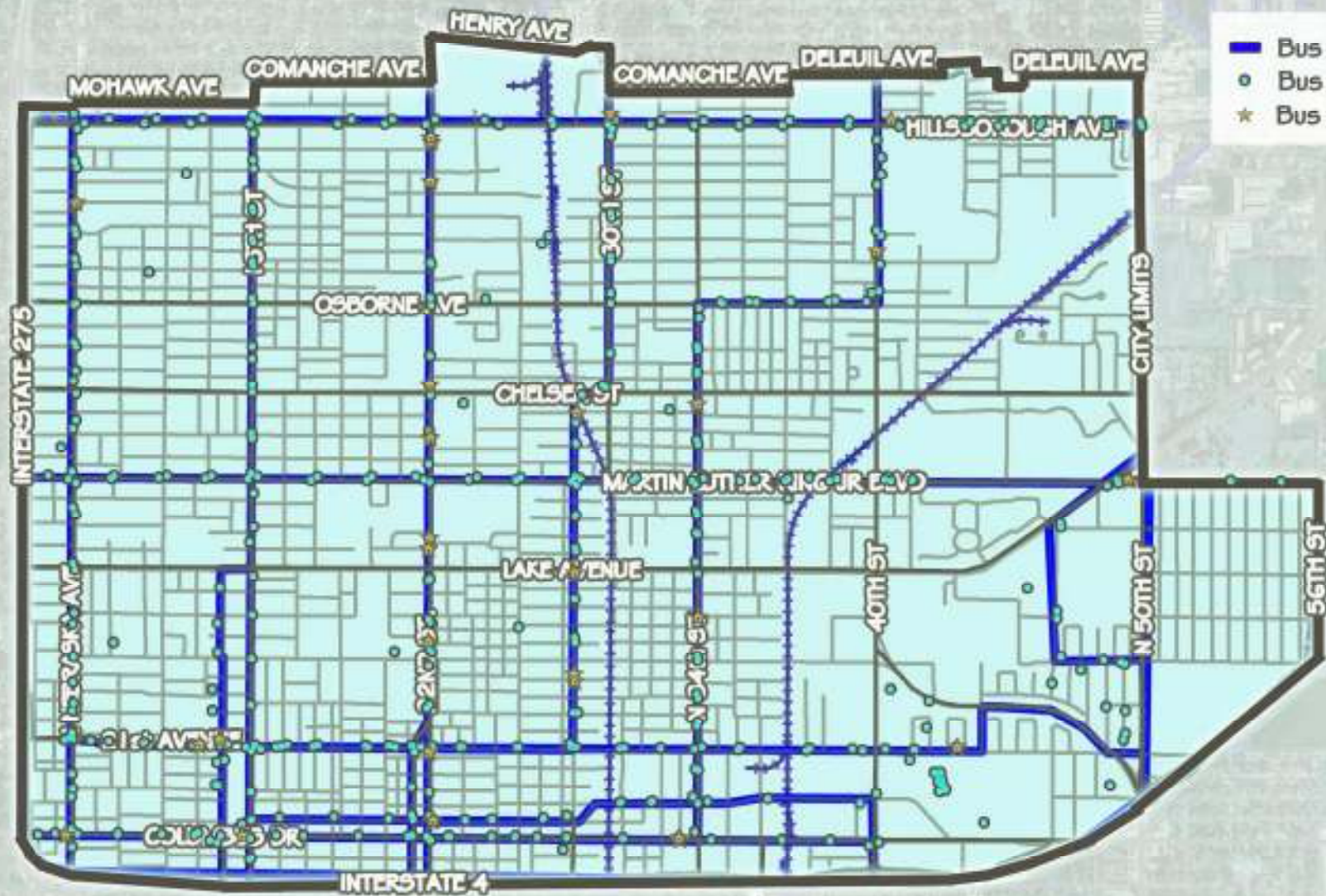
Roadway Level of Service



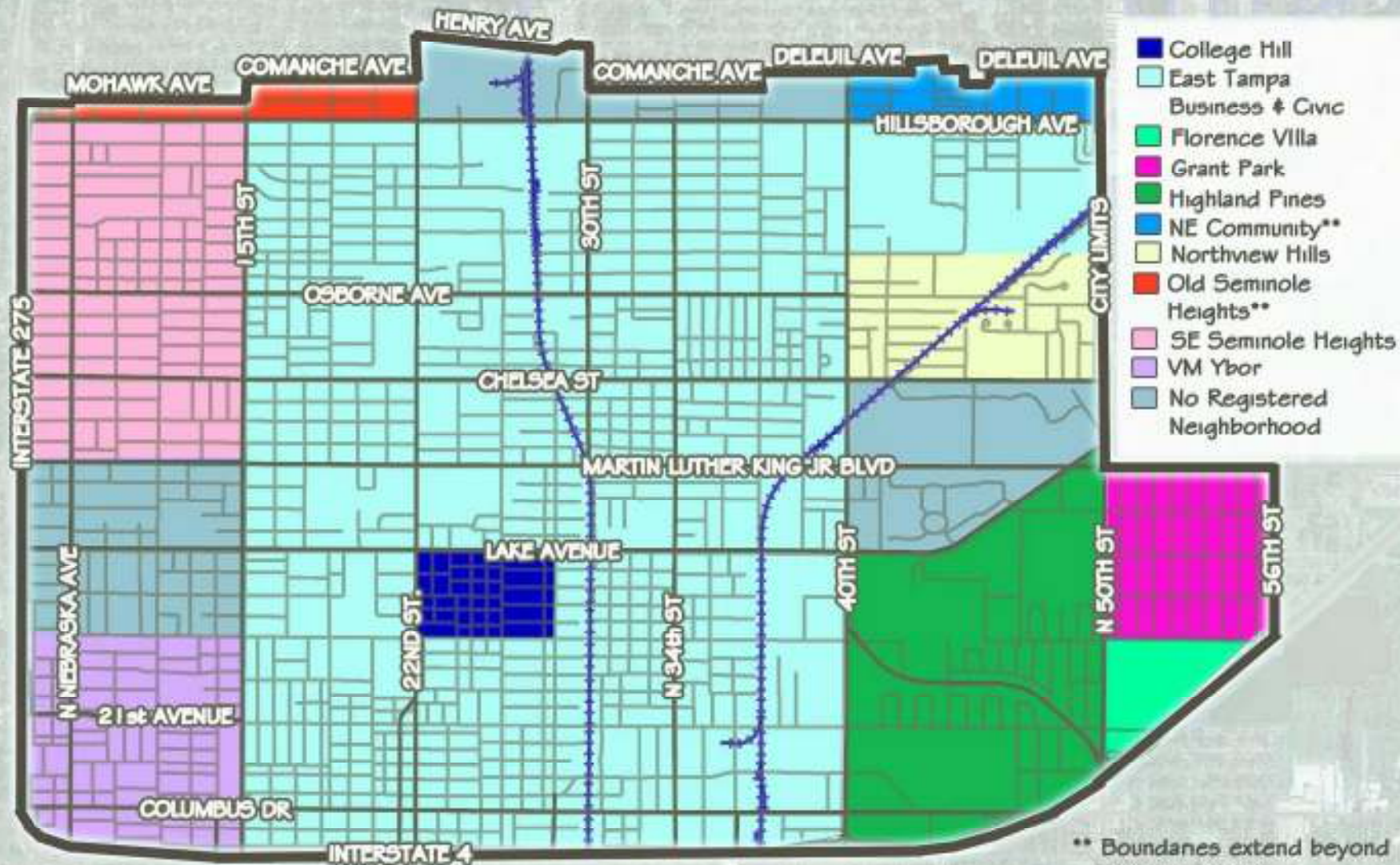
Pavement Condition Index



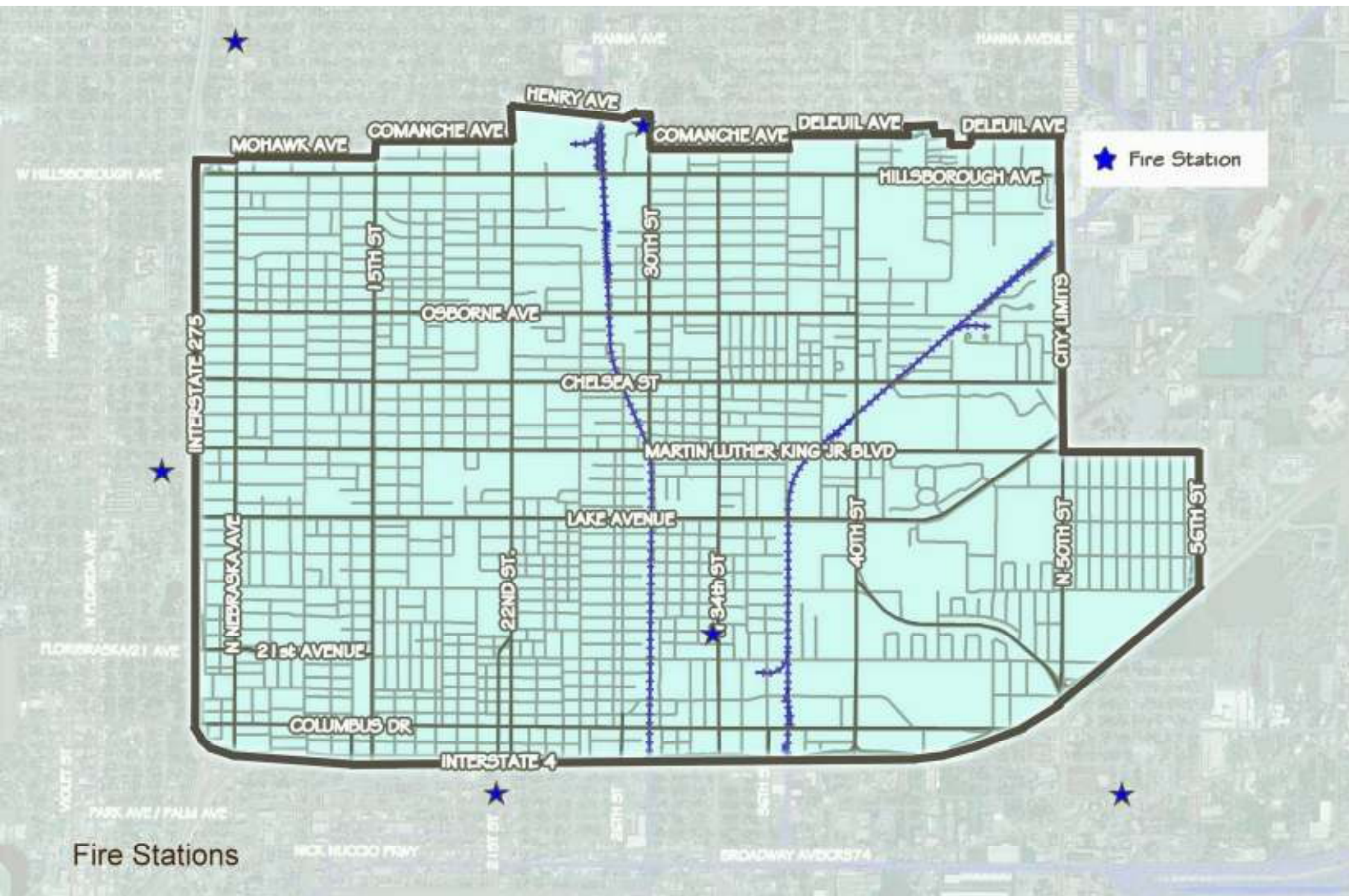
Sidewalk Inventory

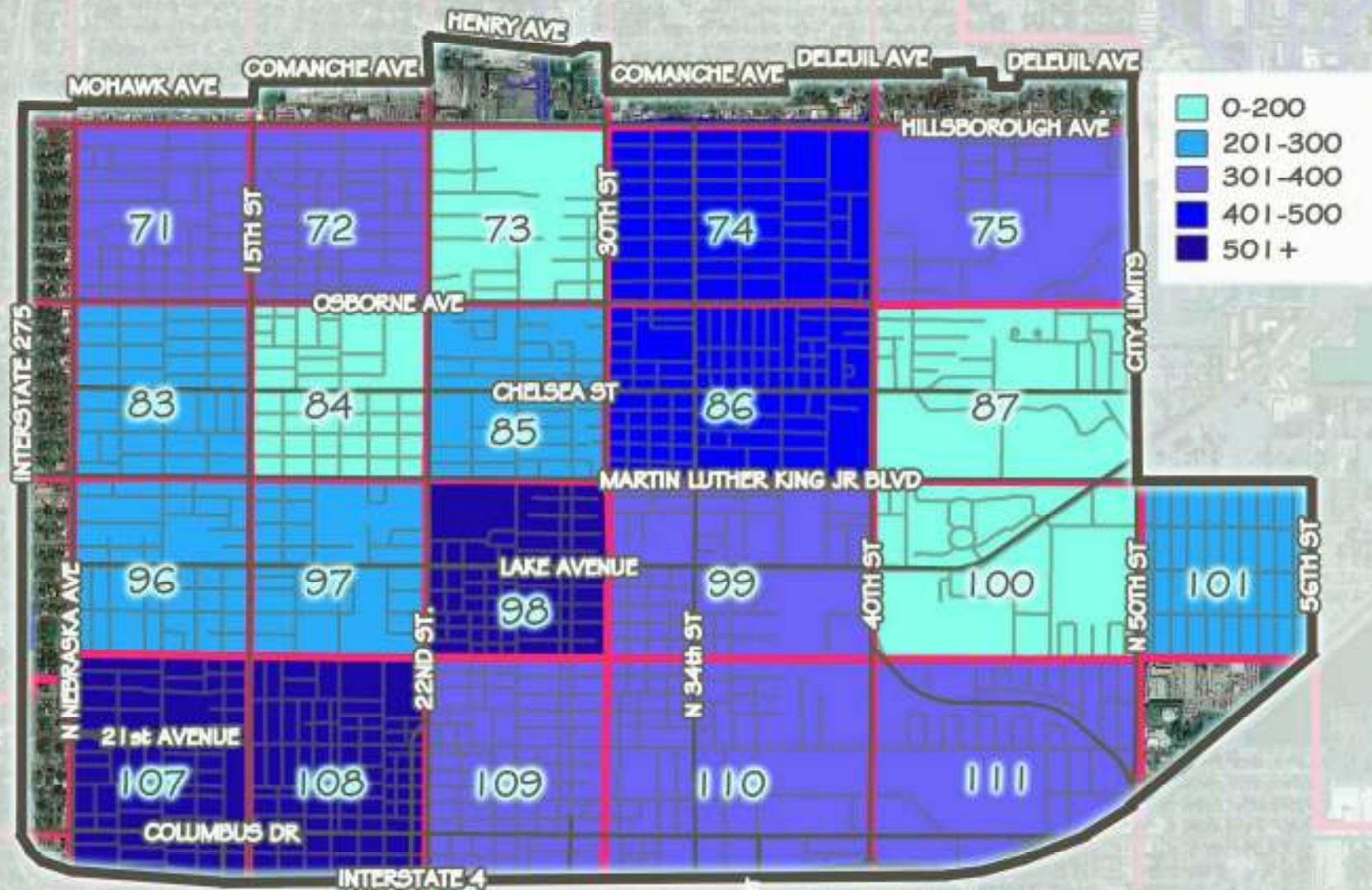


HART Bus Routes, Stops, and Shelters

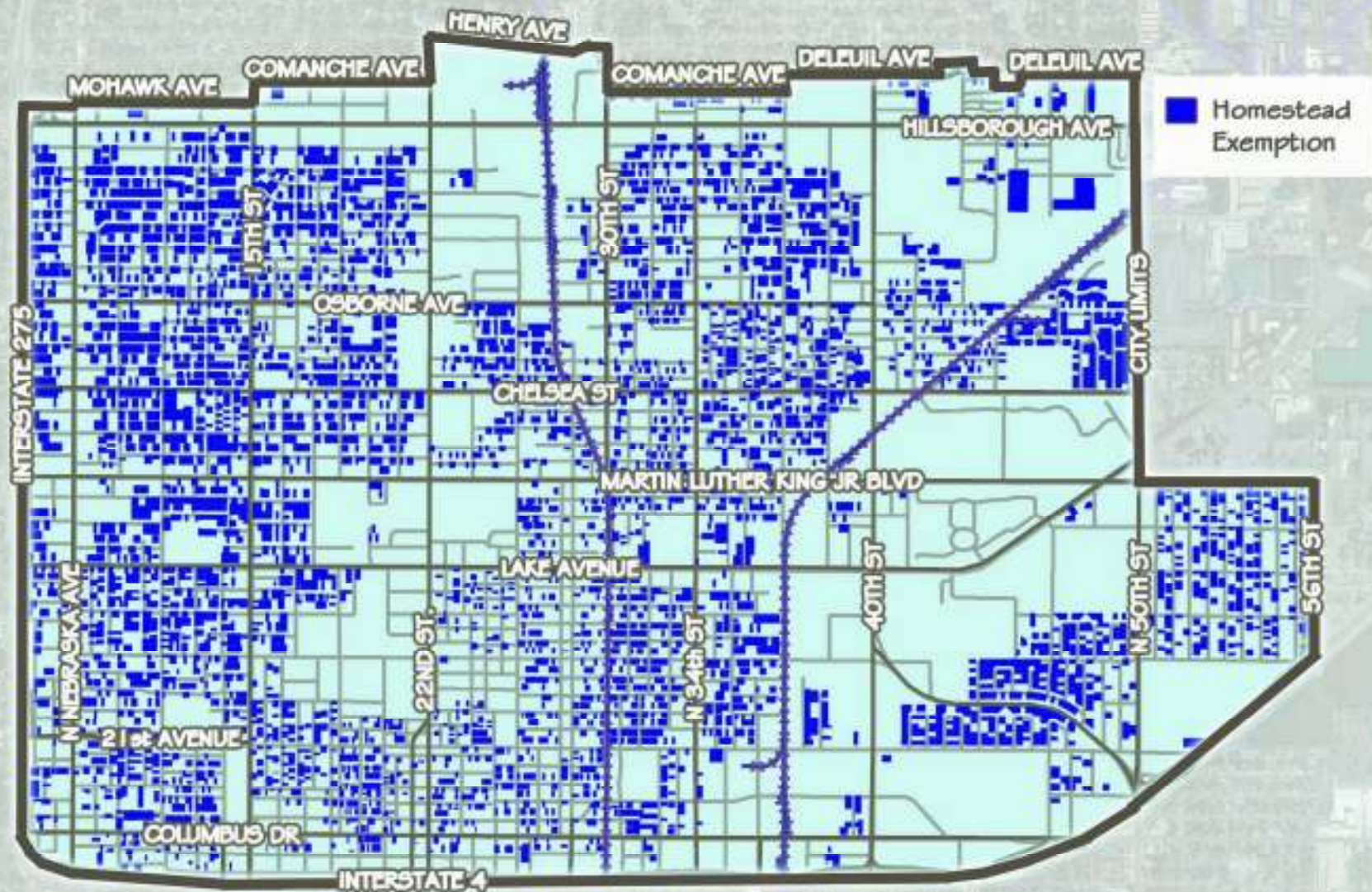


Registered Neighborhood Associations

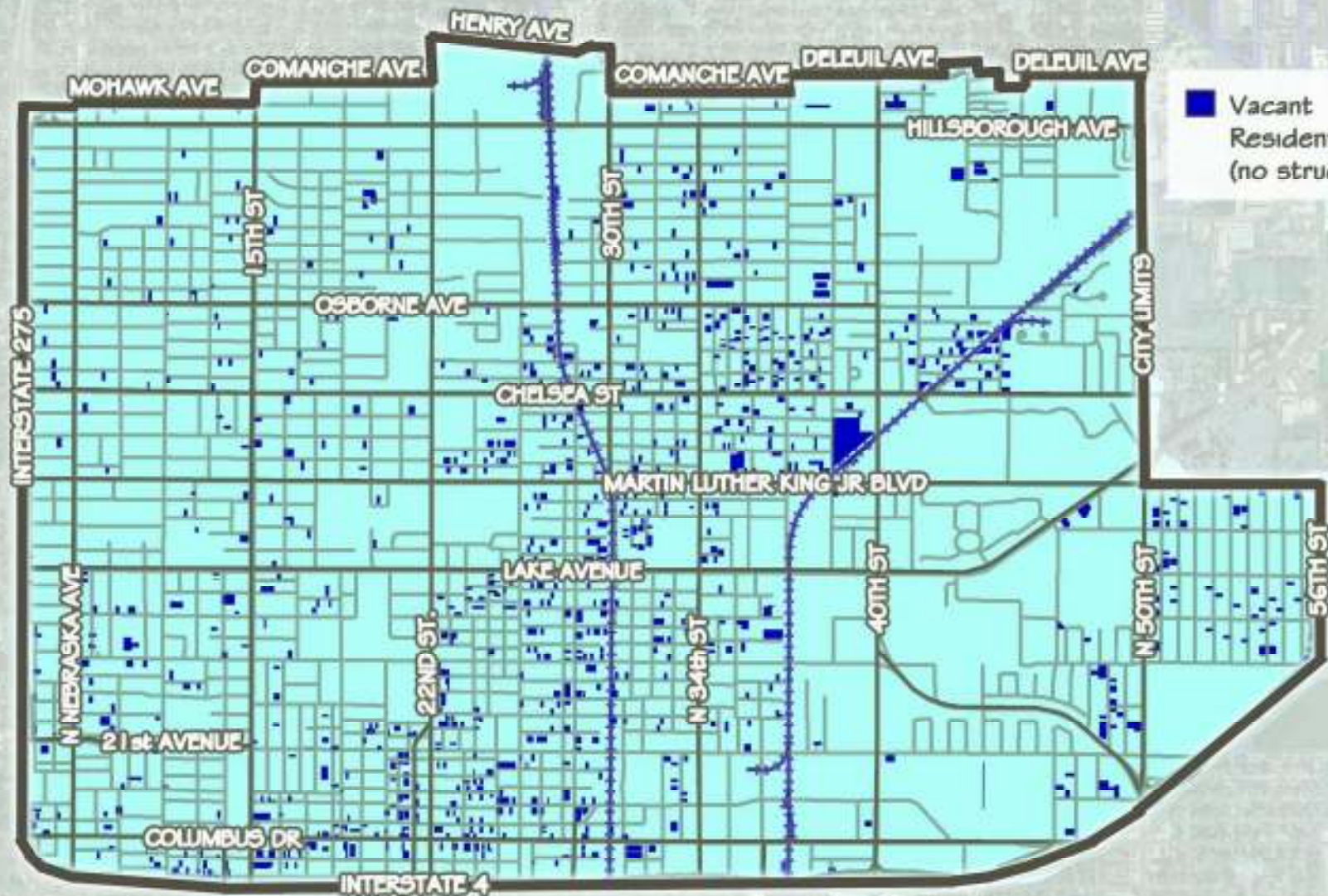




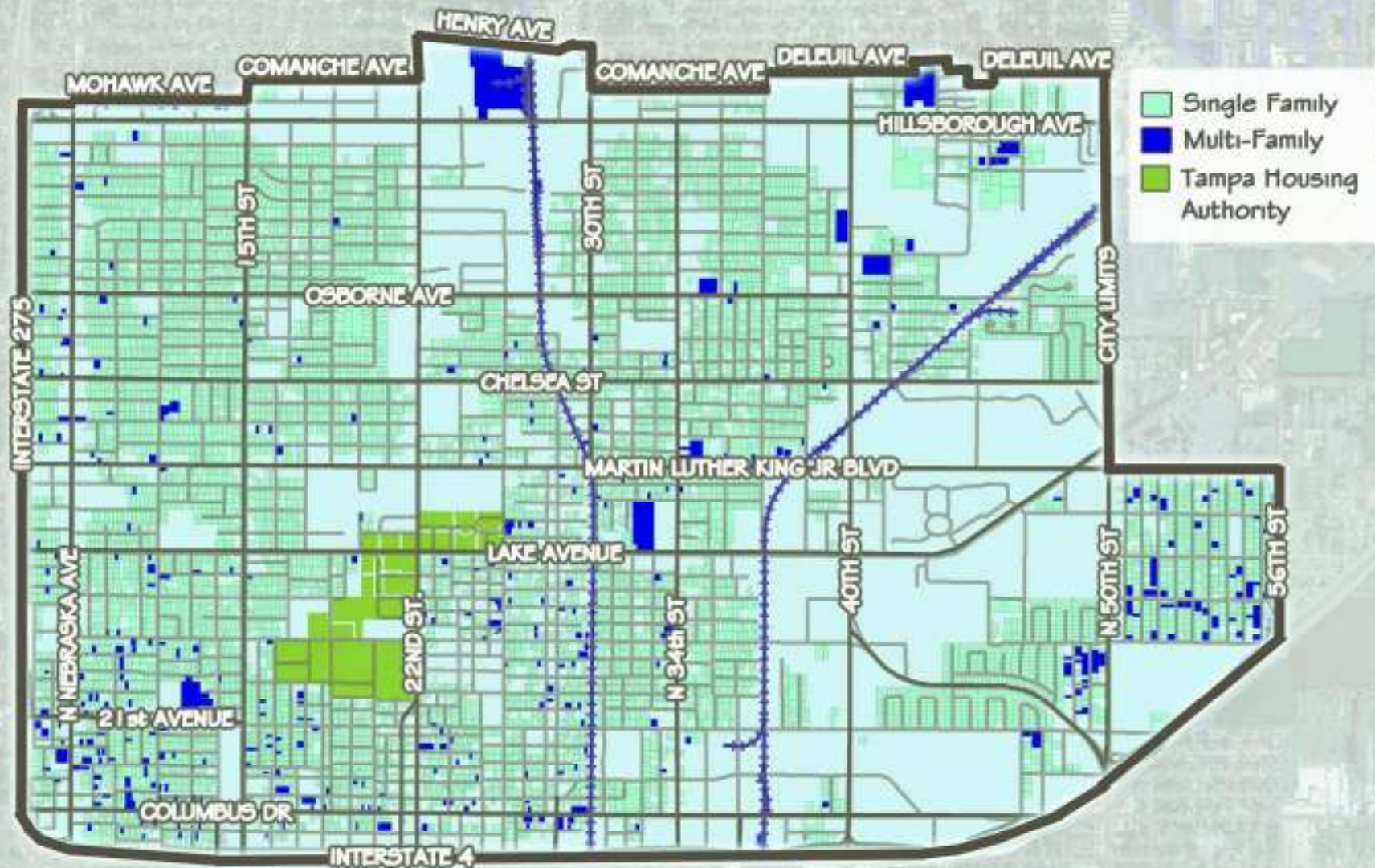
Average Crime Offense Rate by Grid (2001-2005)



Homestead Exemptions Filed in 2006



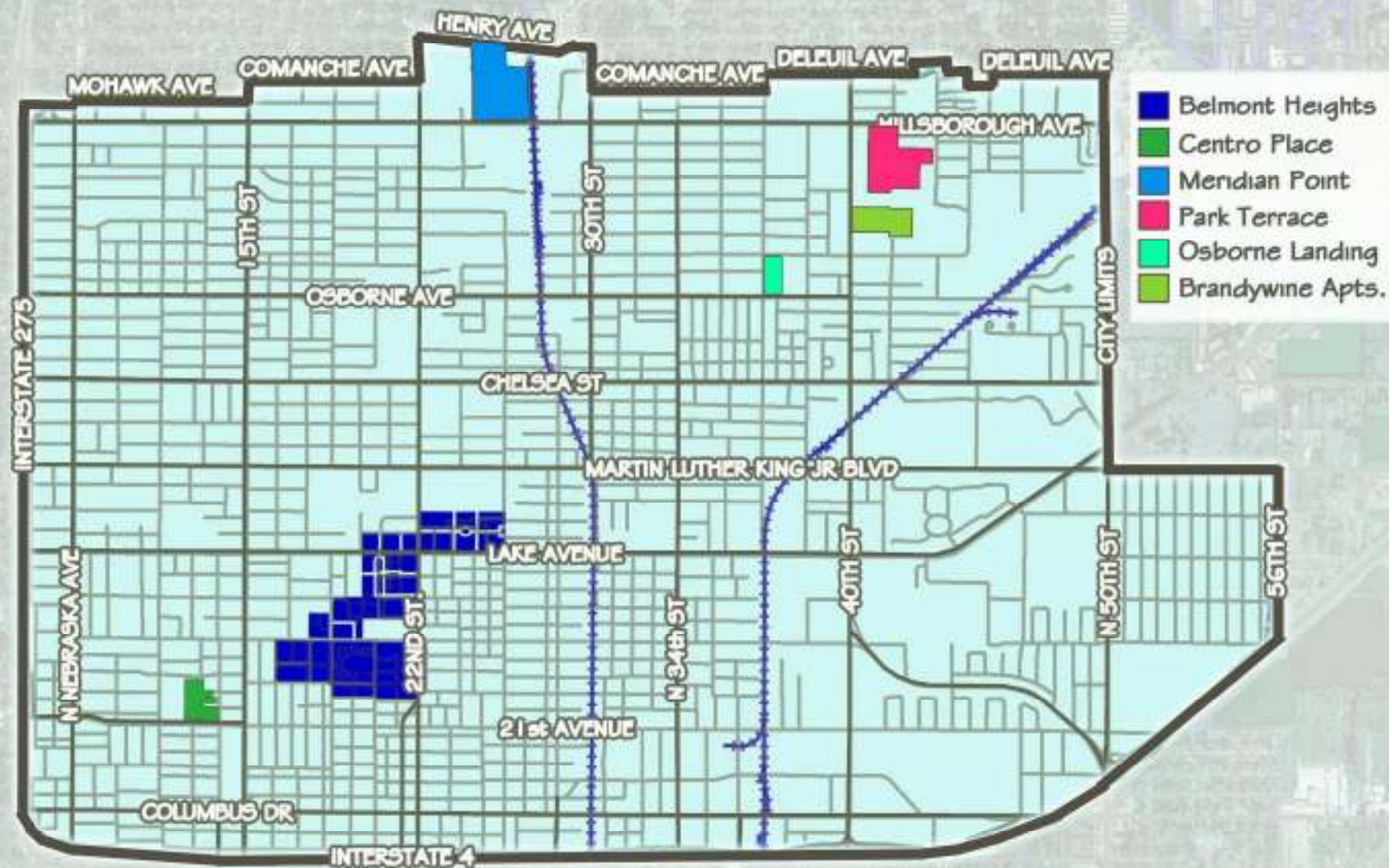
Vacant Residential



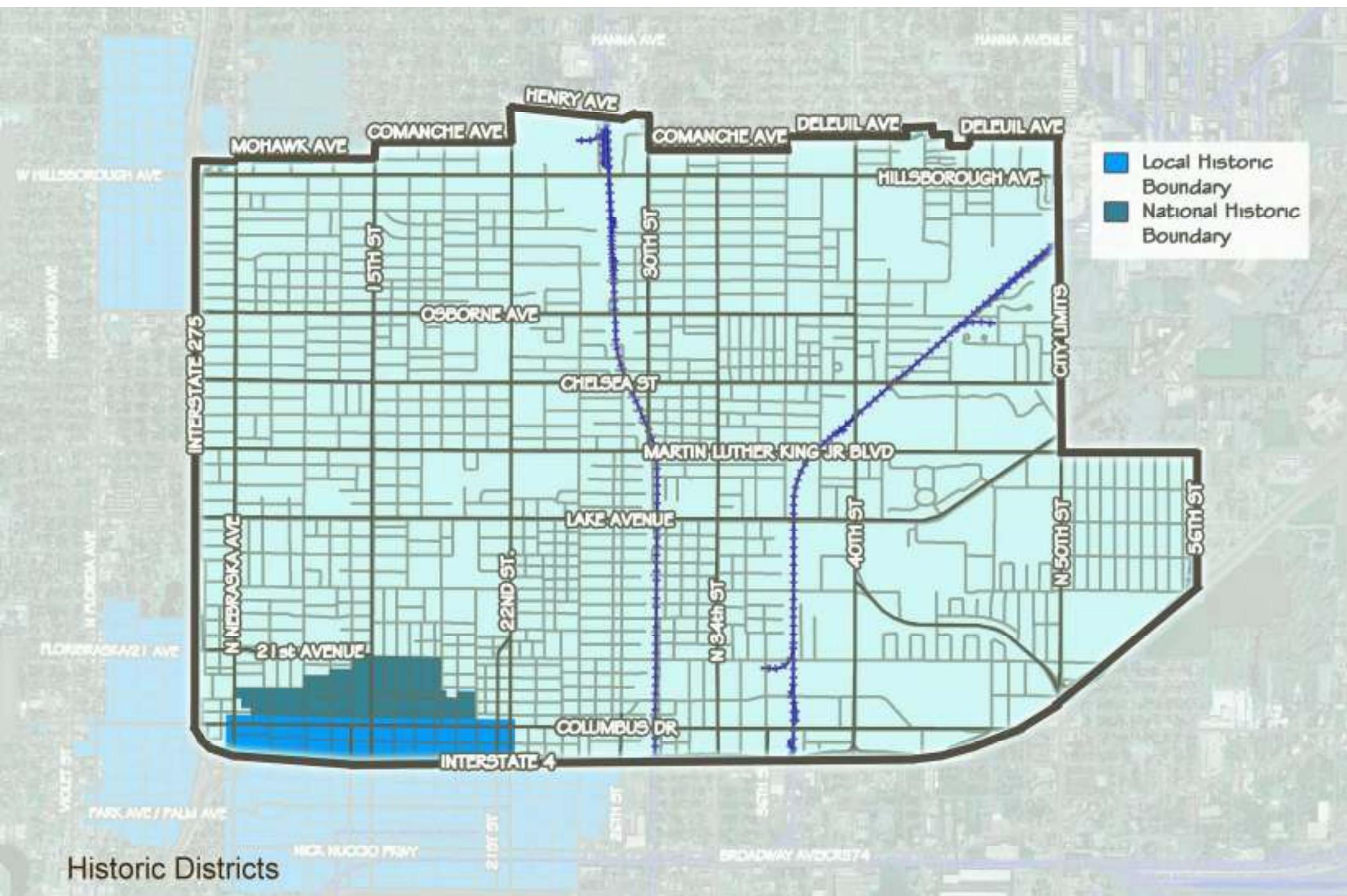
Single Family and Multi-Family Housing

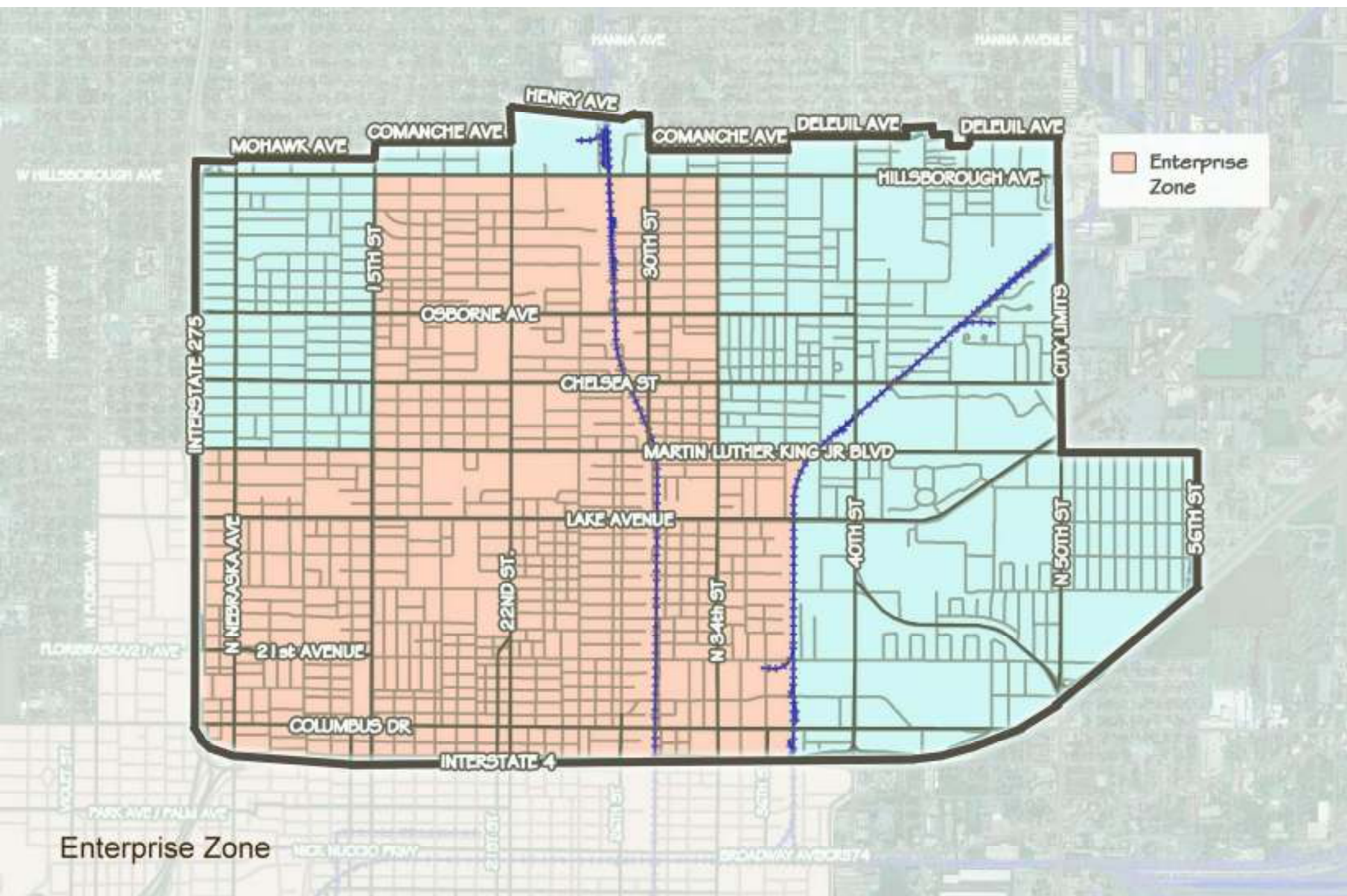


Multi-Family Housing Types



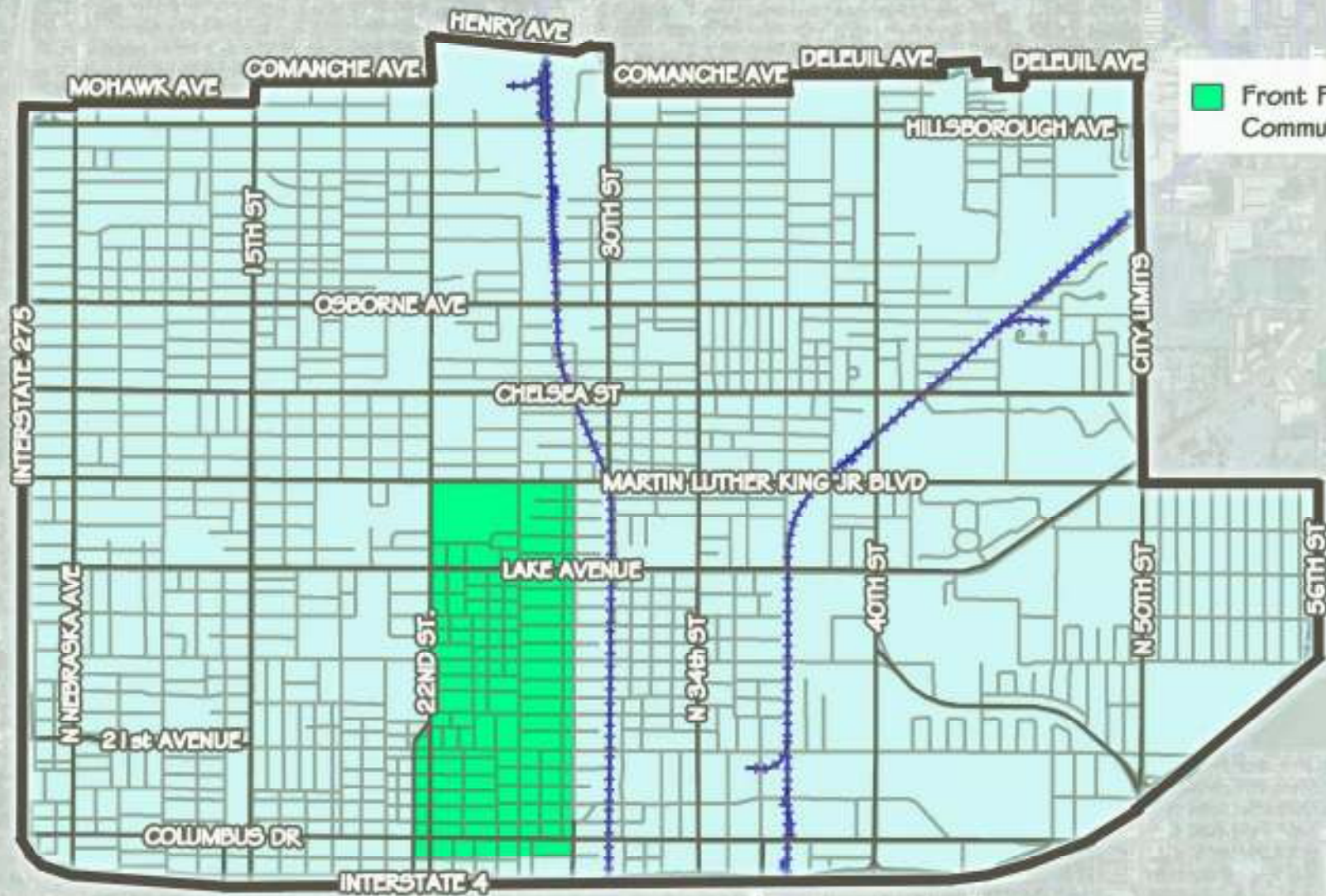
Recent Large-Scale Affordable Housing Initiatives







Identified Brownfield Sites



Heart of East Tampa Front Porch Community