

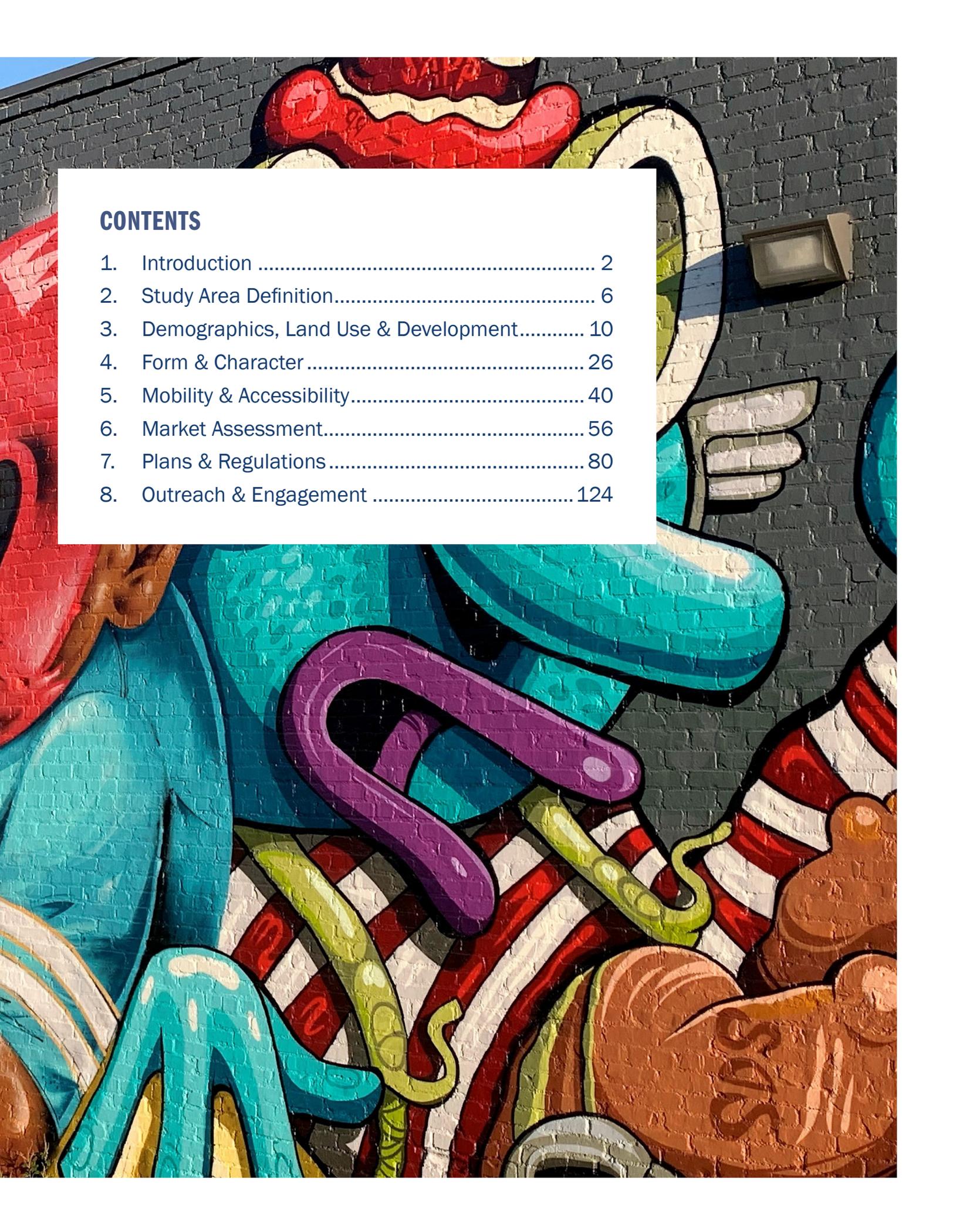
CONTEXT ASSESSMENT

HART TOD Pilot Project

DRAFT - JANUARY 2021







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City of

TAMPA

"Tampa Postcard"
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INTRODUCTION



1. INTRODUCTION

The HART TOD Pilot Project is a study designed to shape the future of Tampa and Hillsborough County communities served by enhanced transit. Hillsborough Area regional Transit (HART), in partnership with the City of Tampa, Hillsborough County, the Hillsborough County City-County Planning Commission (The Planning Commission), and the Hillsborough MPO, is undertaking the study to identify opportunities for transit oriented development (TOD) along corridors planned for enhanced transit service between Downtown Tampa and the USF.

1.1. PROJECT GOALS

The HART TOD Pilot Project is designed to improve the livability, competitiveness, and sustainability of communities along the planned routes for HART's Arterial Bus Rapid Transit (BRT) service and the extension of the TECO Streetcar system.

The Pilot Project is designed to help the City of Tampa, Hillsborough County, and community stakeholders along the project corridor achieve the following goals:

- Protect and improve community character, livability, and resilience;
- Encourage a diverse mix of transit-supportive uses—housing, workplaces, shops, and supportive services;
- Create complete, safe, walkable, and bikeable streets; networks;
- Ensure context sensitive buildings and public spaces; and
- Improve access to local and regional destinations.

1.2. STUDY AREA

The study focuses on communities between Downtown Tampa and USF, generally along Florida and Fowler Avenues. The study area, shown in **Map 1**, includes the commercial frontage along these corridors, as well as the residential and mixed-use communities within walking distance of the corridor. See the Study Area Definition section of this report for more detail.

1.3. STUDY LEADERSHIP & SPONSORS

The project is being led by HART in partnership with the City of Tampa, Hillsborough County, the Hillsborough Planning Commission, and the Hillsborough MPO. Financial support for the study is provided by a grant from the Federal Transit Administration's Pilot Program for Transit-Oriented Development.

1.4. REPORT ORGANIZATION

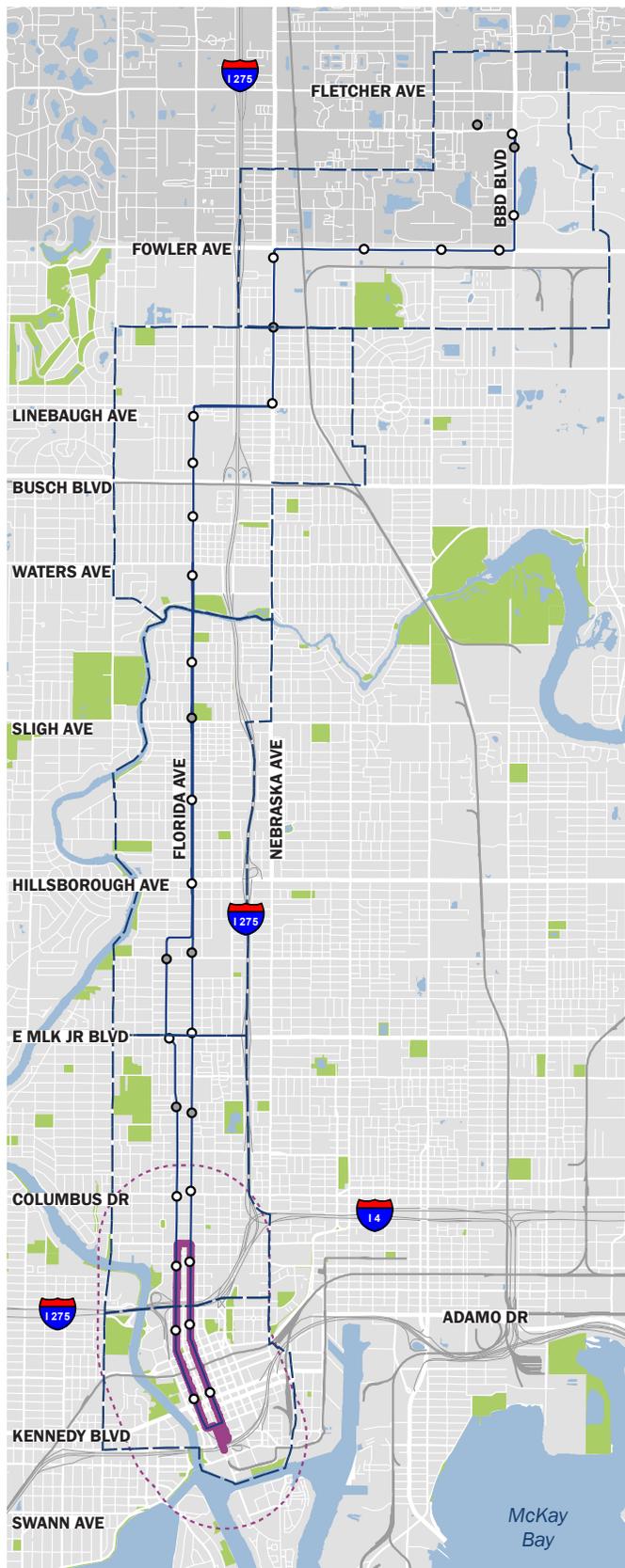
This report, the Context Assessment, is the first in a series of reports being prepared for the HART TOD Pilot Project. This report provides a summary of conditions, policies, and code provisions influencing the potential for TOD investment in the study area, and provides a foundation for the preparation of corridor-specific policy, planning, and regulatory strategies.

Information regarding existing conditions is organized as follows:

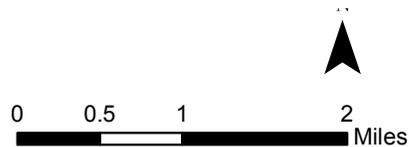
- **Study Area Definition.** A summary of information that informed the definition of the project study area.
- **Demographics, Land Use, & Development.** A review of existing demographic, land use, and development conditions within the study area drawn from datasets available from US Census, the City of Tampa, Hillsborough County, HART, the Planning Commission and MPO, and FDOT.
- **Mobility & Accessibility.** Maps and narrative documenting existing roadway, pedestrian, bicycle, and transit conditions within the study area.
- **Market Assessment.** A high-level real estate market and economic analysis assessing the development potential along the project corridor.
- **Plans & Regulations.** A summary of plans and policies impacting development within the study area, as well as a report on recently completed, under construction, and planned mobility improvements.
- **Outreach & Engagement.** A summary of agency and stakeholder listening sessions, working group sessions, and real estate informant interviews that took place during this phase of the project.



Map 1. Study Area



-  HART TOD Study Area
-  Potential Stations - Fixed
-  Potential Stations - Optional
-  Proposed Alternative
-  Streetcar Proposed Extension
-  Streetcar Halfmile Buffer
-  Park*



*Park includes beach, cemetery, community/recreation center, golf course, park, public pool, trail/trailhead, and zoo.

Source: HART, HDR, City of Tampa



STUDY AREA DEFINITION



2. STUDY AREA DEFINITION

The HART TOD Pilot Project study area is informed by the recommended alignment and proposed stops defined in the *HART Tampa Arterial BRT Study*, as well as the preferred alignment defined for the *Invision Tampa Streetcar project*. As shown in **Map 2**, the proposed BRT alignment extends from Downtown Tampa to the USF area with nineteen total proposed station areas. Additionally, the proposed streetcar extension runs from Downtown Tampa to Tampa Heights, sharing recommended transit guideway with the BRT alignment on Florida Avenue and Tampa Street.

2.1. TOD CORRIDOR & SUBAREAS

To define the TOD study area, a half mile buffer was applied to both the proposed BRT and streetcar extension alignments. A walk shed analysis was conducted to further identify quarter and half mile walking distances from proposed BRT stop locations. These geographical references highlight areas with the greatest potential to be influenced by the introduction of enhanced transit service.

Five TOD subareas were subsequently created to reflect unique qualities, characteristics, and land use patterns along the overall corridor. Neighborhood boundaries were primarily used to delineate the subareas. The following is a brief description of each subarea.

1 Downtown. The Downtown subarea extends from the southern end of Downtown north to I-275. It captures all of the Downtown footprint, as well as a portion of Hyde Park, ENCORE!, and the University of Tampa campus. This area has the highest activity density (population and employment) in the total study area, with the greatest projected increases over the next 20 years. Existing land uses include office, lodging, retail, and regionally-significant civic, entertainment, and cultural uses. Residential uses in this area are primarily multi-family, with several large-scale apartment projects recently completed and under construction. The subarea includes some of the highest transit trip generators in Tampa Bay including high intensity office uses, governmental uses, and convention and special event venues.

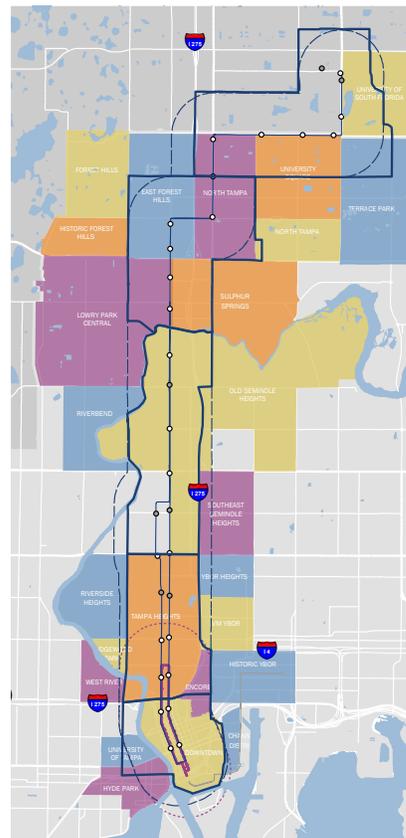
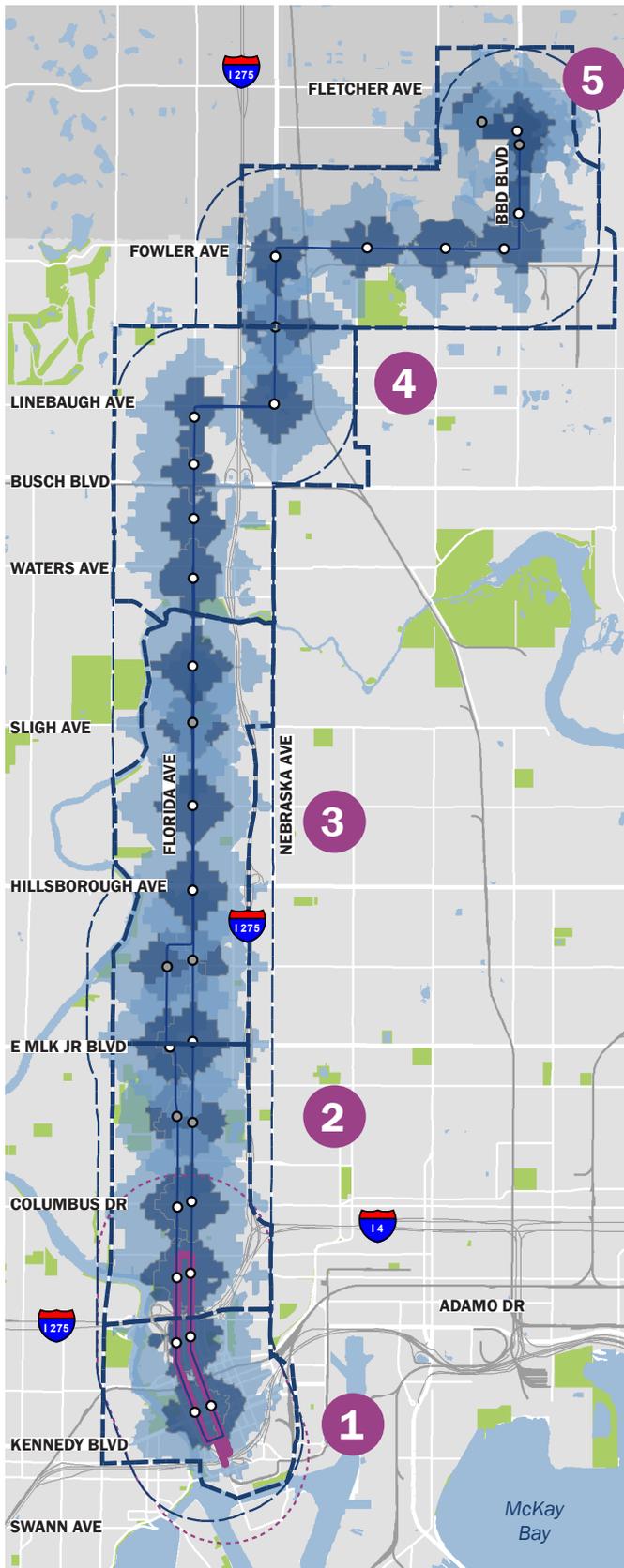
2 Tampa Heights. The Tampa Heights subarea extends from I-275 north to Martin Luther King Jr. Blvd. It captures all of the Tampa Heights neighborhood, as well as the northern portion of ENCORE!. With the Heights development, this subarea is expected to experience dramatic increases in activity density over the next several years. The southern half of the study area includes clusters of restaurants, bars, and entertainment destinations at the Heights and along North Franklin Street. The northern half includes a diverse mix of neighborhoods and auto-oriented uses along Florida Avenue. Residential uses are

primarily single-family homes, with a few multi-family properties, including public housing at Robles Park Village which is under study for redevelopment. The subarea is home to several institutional uses, including Metropolitan Ministries, Brewster Technical Center, and Stetson University College of Law.

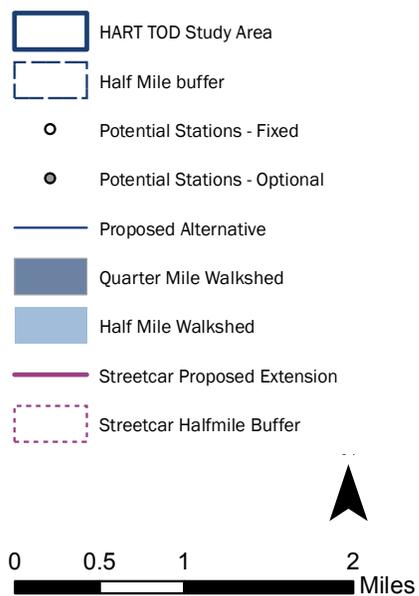
3 Seminole Heights. The Seminole Heights subarea extends from Martin Luther King Jr. Blvd north to the Hillsborough River and captures much of Old Seminole Heights. Existing land uses and building footprints are similar to the Tampa Heights subarea, with clusters of bars and restaurants intermixed with auto service shops. Most buildings in this area were also built between 1901 and 1940. Residential uses in this area are primarily single-family homes, with a few multi-family properties.

4 North Florida/Nebraska. The North Florida/Nebraska subarea extends from the Hillsborough River north to Bougainvillea Avenue. It captures portions of the Sulphur Springs, Lowry Park Central, East Forest Hills, and North Tampa Neighborhoods. Through redevelopment of several older shopping centers, this subarea is projected to see significant increases in activity density over the next 20 years. Existing land uses include large shopping plazas with major grocery stores, chain restaurants, and car dealerships. Buildings are larger in size, built primarily between 1941 and 1980, with uses occupying deeper footprints. Residential uses in this area are primarily single-family homes, with a few multi-family properties.

5 Fowler/USF. The Fowler/USF subarea extends from Bougainvillea Avenue to north of Fletcher Avenue. It captures portions of the North Tampa, University Square, and Terrace Park neighborhoods, as well as a portion of USF and neighborhoods in unincorporated Hillsborough County. Auto-oriented development is predominant with a mix of stand alone retail uses, larger-scale shopping plazas, and the University Mall property which is in its first phase of redevelopment. This subarea is home to the James A Haley Veterans' Hospital, the Moffitt Cancer Center, and related regionally-significant medical and research facilities on the USF campus.



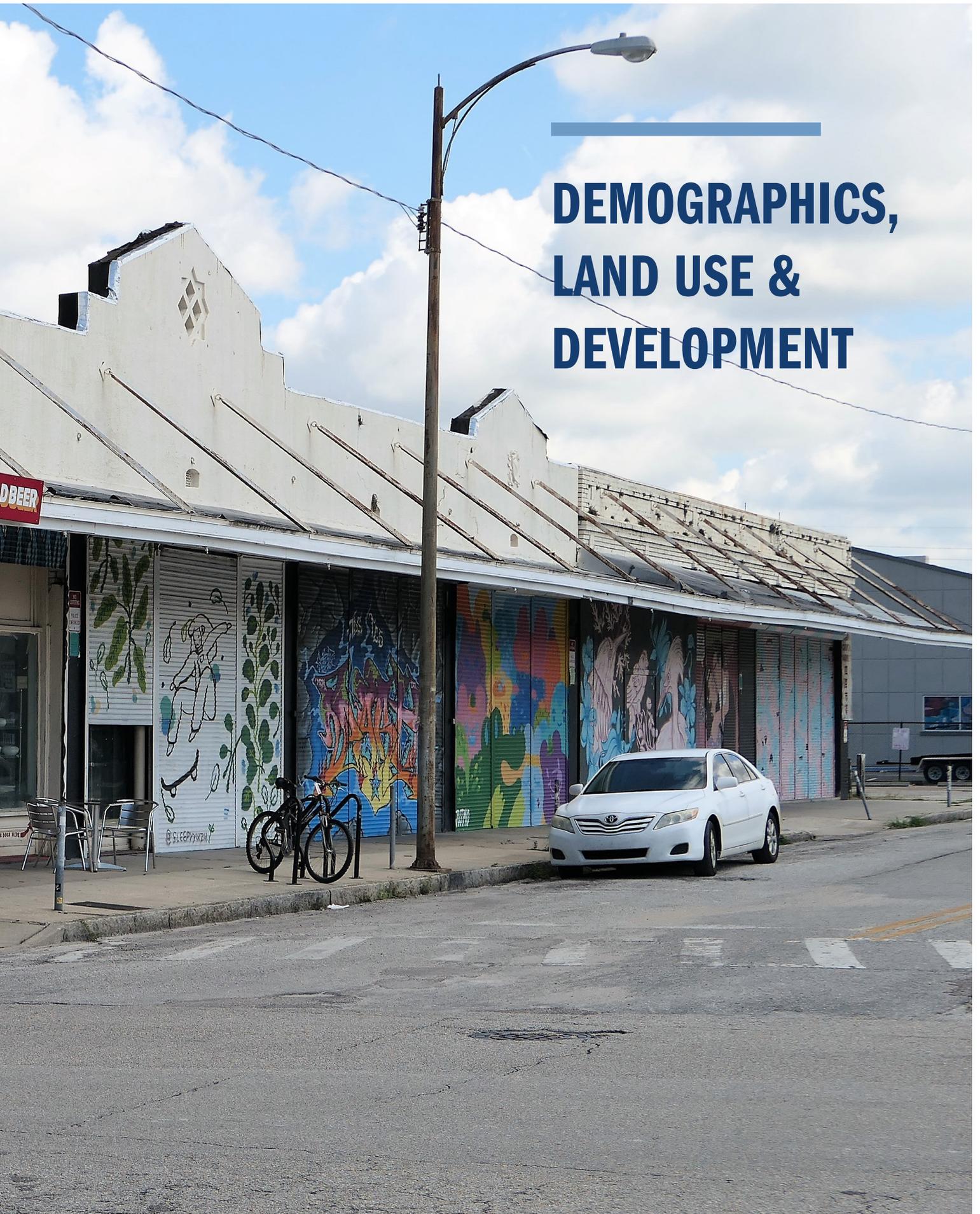
Map 2. Study Area Definition



Source: HDR



DEMOGRAPHICS, LAND USE & DEVELOPMENT



3. DEMOGRAPHICS, LAND USE & DEVELOPMENT

This section provides a review of corridor demographics, existing land use, and development conditions within the study area. The assessment focuses on existing land use, land utilization, and value data drawn from datasets available from the Planning Commission and the Hillsborough County Property Appraiser’s office.

3.1. CORRIDOR DEMOGRAPHICS

When planning for transit investment, it is important to consider how all residents could benefit from increased housing choices, employment, community amenities, and local services driven by improved transit access. Studies have shown that such investment increases the demand for housing and can drive up prices, leading to displacement. Households most likely to be displaced are those with lower incomes. These are the same households who would most benefit from increased access and lower costs for transportation. Understanding who lives within the study area and the various socioeconomic contexts is critical to ensure that no one gets left behind and that the benefits and burdens of transit-oriented development are equitable.

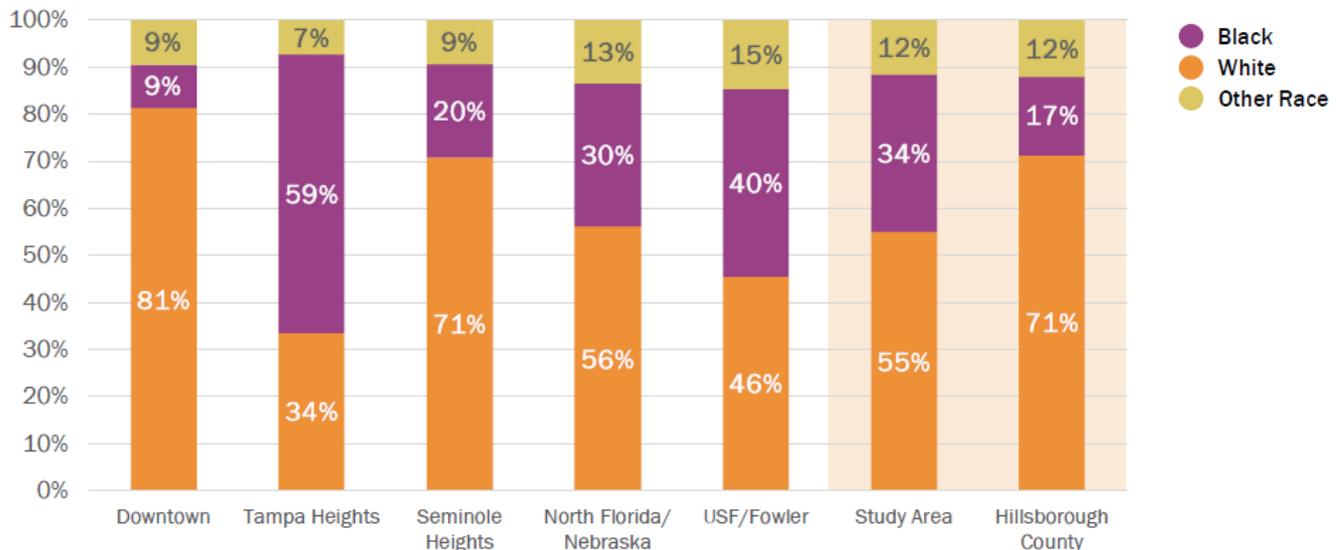
Race & Income

The study area is more diverse than Hillsborough County. Respectively, 34% and 26% of the study area population is Black and of Hispanic origin. The Black share of the study area population is twice the percentage in the County (17%) (Figure 3, Map 4).

The 2020 median household income (MHI) in Hillsborough County is \$69,200, which is over twice the MHI in the study area (\$31,400). The Tampa Heights and Fowler/USF subareas have the lowest MHIs within the study area; the Seminole Heights and Downtown Tampa subareas have the highest MHIs in the study area.

MEDIAN HOUSEHOLD INCOME (MHI)
\$69,200 Hillsborough County
\$31,400 Study Area

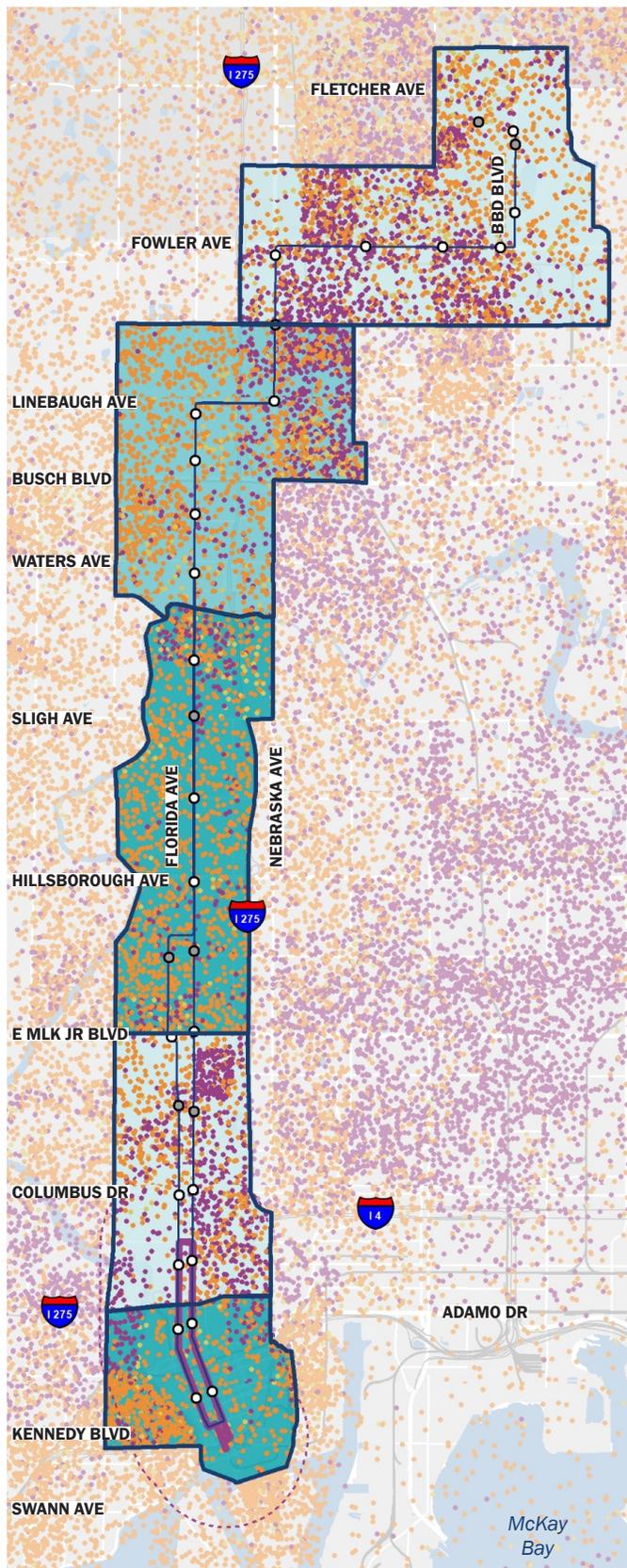
Figure 3. Race by Subarea & Comparison Geographies (2020)



Source: ACS, Ersi, HDR, SB Friedman



Map 4. Race & Median Household Income



- Race
 - Black
 - White
 - Other Race
 - 10 People
- Median Household Income
 - Less than 30% AMI
 - 30% AMI to 60% AMI
 - 60% AMI and Greater



0 0.5 1 2 Miles

Source: ACS, Esri, HDR, SB Friedman

HART TOD Pilot Project

POPULATION & EMPLOYMENT PROJECTIONS

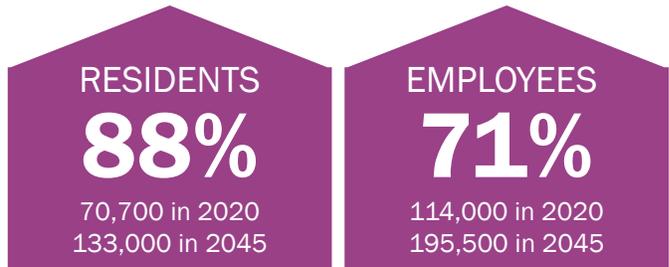
Projected population and employment within the study area is mostly concentrated in the Downtown, North Florida/Nebraska, and Fowler/USF subareas. Based on projections reflected in the latest regional planning model (TBRPM 9.0, 2020), the study area is projected to have approximately 70,700 residents and 114,000 employees in 2020, and by 2045, these numbers are expected to increase to 133,000 residents and 195,500 employees. Overall, the area is projected to experience an 88% increase in residents and a 71% increase in employees from 2020 to 2045.

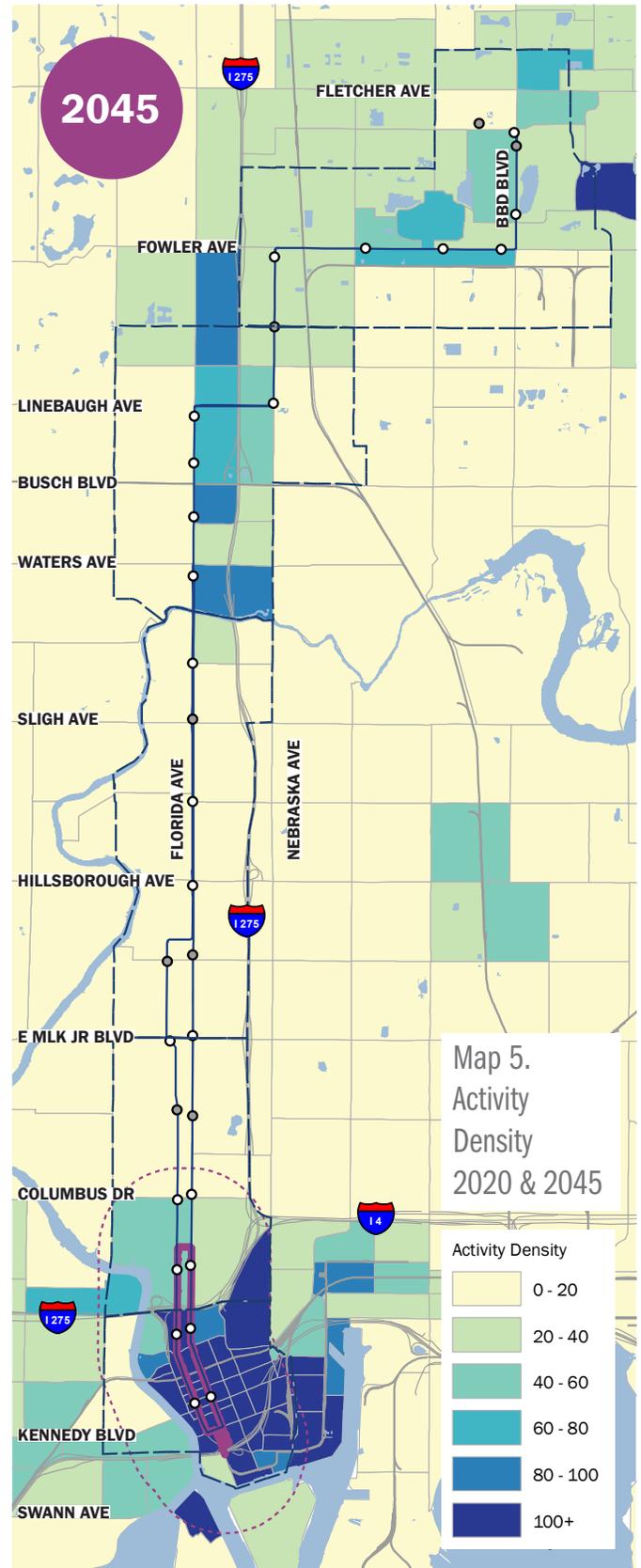
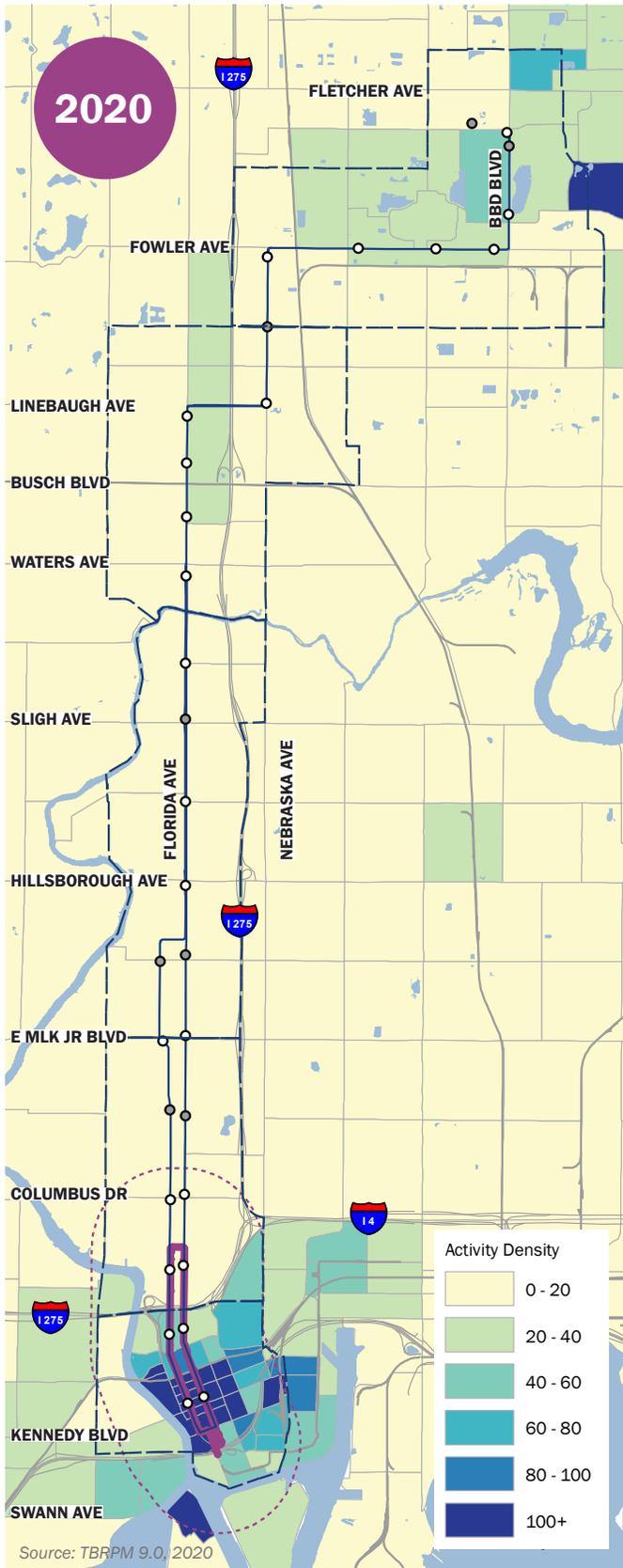
Map 5 shows the existing (2020) and projected (2045) density of residents and employees within and surrounding the study area. Specifically, the maps show activity density, which is defined as the density of residents and employees per acre by traffic analysis zone (TAZ). (TAZ's are the geographic areas used in the regional planning model to show estimates and projections of residents and employees.)

As shown in **Map 5**, the overall 2020 activity density within the study area is generally low, with the majority of the TAZs having less than 20 residents and employees per acre and those in Downtown Tampa showing especially high activity densities due to the presence of high occupancy office buildings and multifamily housing.

As **Map 3** also shows, activity densities are expected to increase dramatically by 2045. Within the study area, the following areas are expected to see the most significant increases in residents and employees by 2045:

- **Downtown Tampa.** This area includes the currently under construction Water Street project, the Channel District, and ENCORE! all of which include residential and commercial development.
- **Tampa Heights north of I-275.** This includes The Heights project, as well as nearby residential areas.
- **North Florida/Nebraska North of the Hillsborough River.** This includes the TGT Poker and Racebook track, as well as a number of large footprint commercial properties and some residential areas.
- **Fowler/USF North and south of Fowler Avenue.** This includes the University Mall redevelopment as well as commercial areas south of Fowler and residential areas in north of Fowler.





UNDERSERVED & DISADVANTAGED COMMUNITIES

The lack of accessible transportation infrastructure and transit service has a direct impact on the health and economic well being of a community. This impact is particularly adverse in low income communities with higher rates of dependence on transit, bicycling, and walking.

To understand the relative differences in advantages for communities in the study area, an equity analysis was completed. This equity analysis included an evaluation of seven socio-economic indicators. To help define underserved and disadvantaged populations, the following population and household data from the 2018 American Community Survey (ACS) were used:

- **Population Below Poverty Level.** Percentage of population below poverty level
- **Minority Population.** Percentage of minority population*.
- **Limited English Proficiency.** Percentage of population with limited English proficiency
- **Population Over 65.** Percentage of population age 65 or above
- **Population Under 18.** Percentage of population 18 or below
- **Zero-Vehicle Household.** Percentage of zero-vehicle households
- **No Car Commute.** Percentage of means of transportation to work other than personal motor vehicle

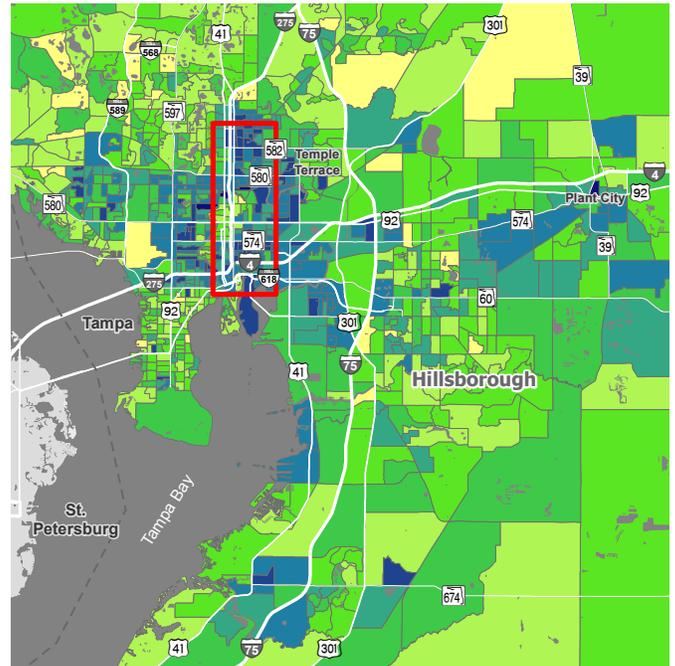
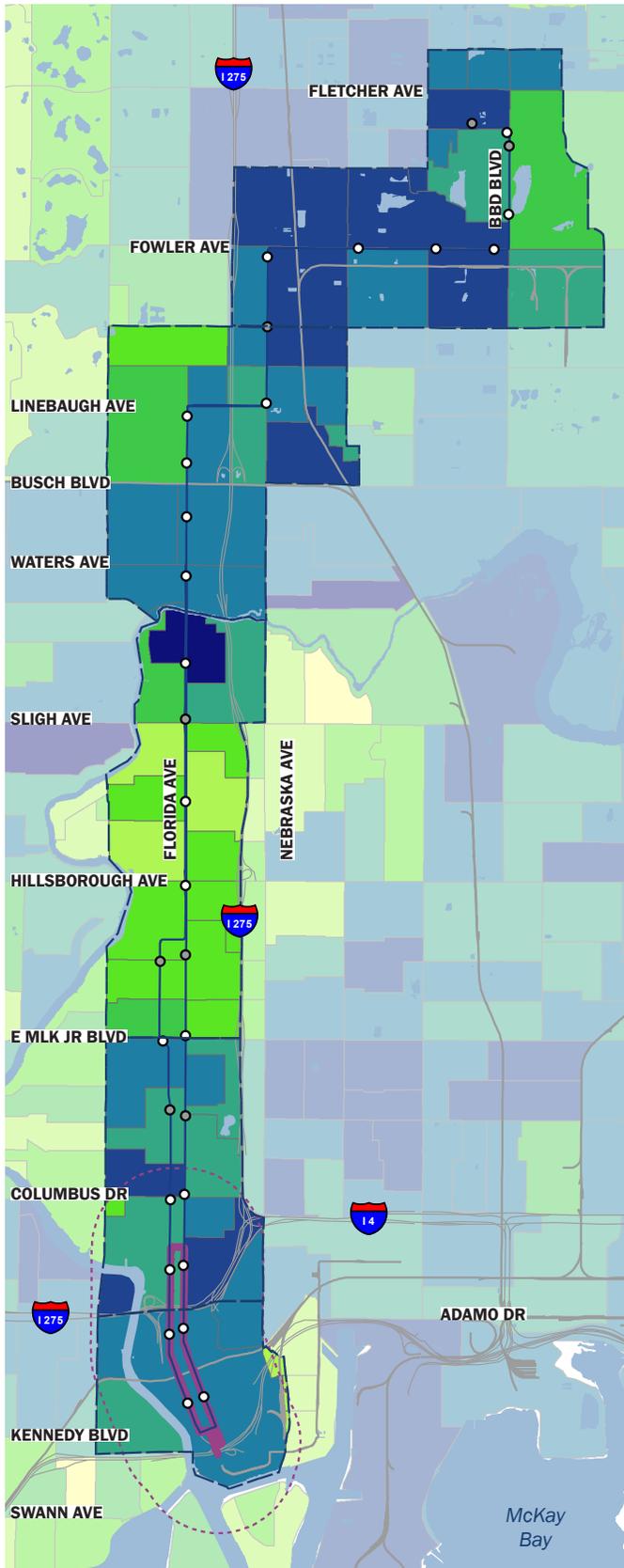
"Minority Population" is the population that lists their racial status as a race other than white alone and/or lists their ethnicity as Hispanic or Latino. That is, all people other than non-Hispanic white-alone individuals. The word "alone" in this case indicates that the person is of a single race, not multiracial.

The analysis used a threshold for each of the above indicators, so that those census block groups with a greater value than the mean value for any given indicator was given a score of "1". The scores for the individual categories were then summed across the seven socio-economic indicators to generate a composite equity score. For example, if a census block group had an above average number of people below poverty level and an above average number of people 65 years of age or older, the census block group was given a score of "2". The "Equity Score" range has a maximum possible high score of "7", indicating above average values for each of the seven socio-economic indicators, and a minimum possible low equity score of "0", which would indicate no above average values.

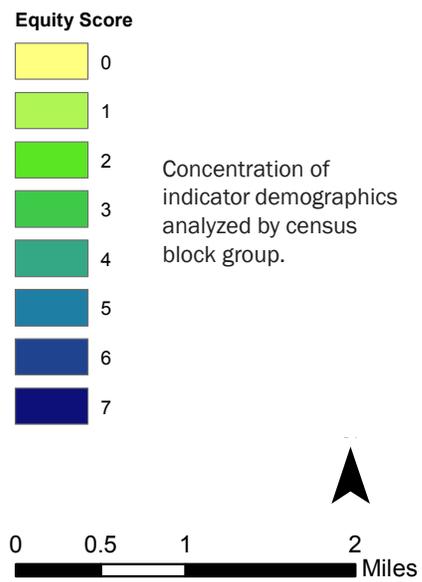
The results of combining these demographic patterns are demonstrated in **Map 6**. This map shows the areas with the highest concentration of these demographic characteristics are in the Downtown, Tampa Heights, North Florida/Nebraska, and Fowler/USF subareas. The Seminole Heights subarea had the lowest concentration of under-served populations. When compared to Hillsborough County as a whole, it is clear the study area is home to some of the most underserved and disadvantaged communities in the County.

The results show areas where the HART TOD Pilot Project can focus planning efforts and prioritize improvements and initiatives aimed at diversifying land uses, improving access to transit, and ensuring walking and biking are safe and convenient means of travel.





Map 6. Underserved & Disadvantaged Communities



Source: Census ACS 2018

3.2. LAND USE & DEVELOPMENT

EXISTING LAND USE

The following section of the report provides a review of existing land uses in the study area, organized by major category of use.

Public/Institutional/Educational

Anchored by two major universities—the University of Tampa and the University of South Florida (USF)—the study area includes approximately 556 public/institutional and educational parcels occupying over 2,550 acres of land. (As a portion of USF is in the study area, this acreage total includes the full campus.)

The Downtown subarea includes some of Tampa Bay's most highly visited civic, cultural, entertainment, and sports venues including the Tampa Museum of Art, Glazer Children's Museum, Tampa Convention Center, Amelie Arena, the Straz Center, the Hillsborough County Courthouse, and the new center for USF Health in Water Street.

A number of schools are located in the Tampa Heights and Seminole Heights subareas, including Hillsborough High School, Memorial Middle School, Blake High School, Brewster Technical Center, Stetson University College of Law, and Seminole Heights Elementary.

The North Florida/Nebraska and Fowler/USF subareas are rich in public/institutional facilities. Parcels between Busch Blvd and 109th Avenue are primarily religious uses, the largest being the Diocese of St. Petersburg. Parcels north of 109th include medical and educational uses at the Moffit Cancer Center, Shriners Hospital, James A. Haley Veterans Hospital, and the University of South Florida.

Residential

There are over 12,150 residential parcels occupying approximately 2,130 acres of land distributed across the study area. Parcels located in the Downtown subarea in multi-family use include Manor Riverwalk, Aurora, SkyPoint, Element Tampa, One Laurel Place, and Encore!.

Parcels in the Tampa Heights and Seminole Heights subareas are primarily two-family and single-family homes built between 1901 and 1940. A few multi-family properties include Mobley Park, the Pearl, residential buildings on the Metropolitan Ministries campus, Robles Park Village, Avenue Lofts, HITE, and the Oaks at Riverview.

Residential parcels in the North Florida/Nebraska subarea are also primarily two-family and single-family homes.

A few multi-family properties include J.L. Young Garden, Westchester Manor Condominiums, Johnny's Mobile Home park, Jersey Mobile Home Park, and Catholic Charities Mercey House. The Fowler/USF subarea has multiple large-scale multi-family properties located north and south of Fowler Avenue that include the Village At University Square, Oak Chase Apartments, The Park At Orvieto Apartment Homes, and University Village.

Commercial

There are approximately 1,214 commercial parcels over 914 acres of land distributed across the study area at varying scales. Parcels located in the Downtown subarea include multi-story office buildings, retail, bars and restaurants, hotels, and commercial parking lots.

Parcels in the Tampa Heights and Seminole Heights subareas have shallow footprints primarily located along Florida Avenue and Tampa Street. These parcels include a diverse mix of restaurants, retail shops, small offices, medical uses, gas stations, and auto repair shops.

Commercial parcels in the North Florida/Nebraska and the Fowler/USF subareas are larger in size with uses occupying deeper footprints off Florida, Nebraska, and Fowler Avenues. Parcels include the University Mall property, several large shopping plazas, car dealerships, gaming uses at the site of the dog track, professional offices, hotels, medical offices, gas stations, grocery stores and food marts, restaurants, and auto repair shops.

Parks & Recreational

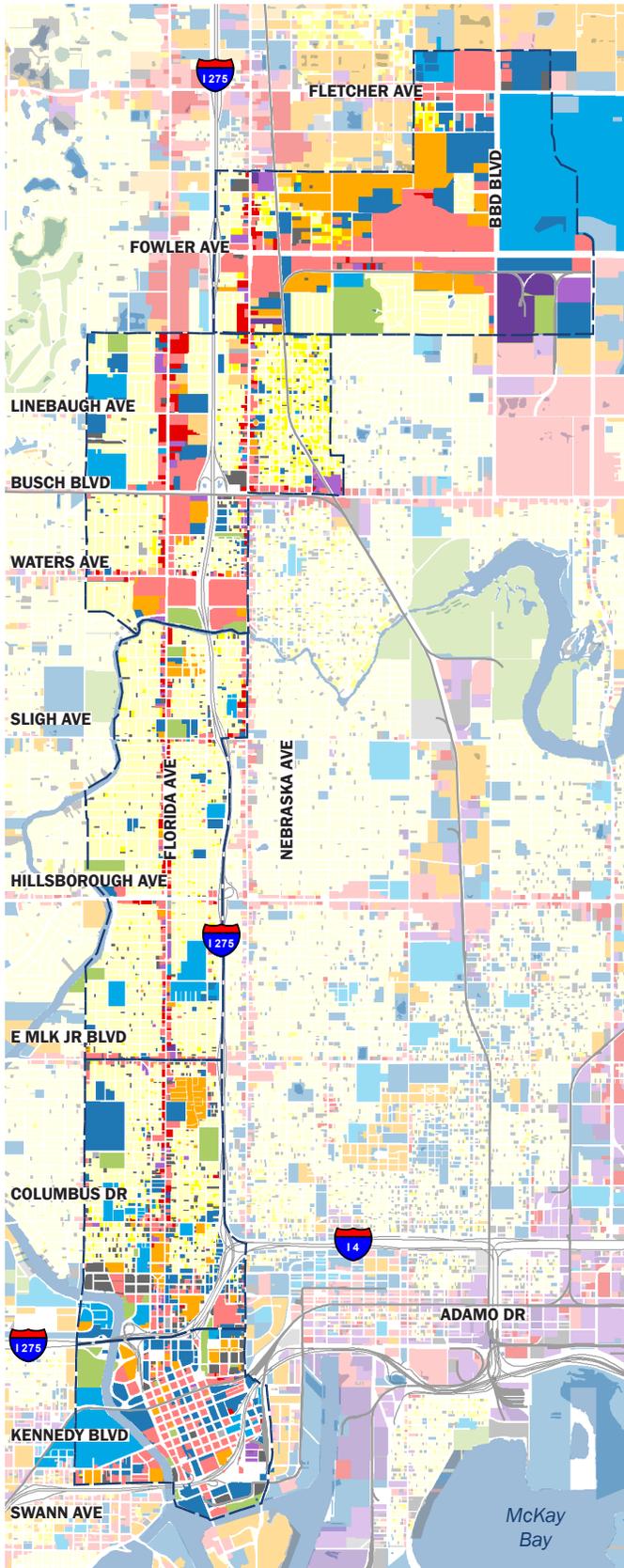
There is a little over 200 acres of recreational and open spaces in the study area. Downtown has an abundance of plazas and parks such as Lykes Gaslight Park, Joe Chillura Courthouse Square, MacDill Park on the Riverwalk, the Riverwalk, and Curtis Hixon Waterfront Park. Tampa Heights also has several larger-scale public parks including Waterworks Park and Phil Bouquardez Park.

Outside of Downtown and the southern end of Tampa Heights, there are few public open spaces in walking distance of the corridor. In Seminole Heights, several blocks east and west of the study area are Robles Park, Henry & Ola Park, and a string of contiguous open spaces such as Calvin Taylor Park, Woodlawn Cemetery, and Plymouth Playground. American Legion Park, at the intersection of Sligh and Florida Avenues, is located directly on the corridor. As is River Tower Park, near Waters Avenue, just north of the river.

With the exception of Forest Hills Park there are limited public open spaces north of Seminole Heights. Copeland Park is the only green space accessible from Fowler Avenue.



Map 7. Existing Land Use within the Study Area



Existing Land Use

-  Single-Family
-  Two-Family
-  Multi-Family
-  Mobile Home Park
-  Light Industrial
-  Heavy Industrial
-  Light Commercial
-  Heavy Commercial
-  Public/Quasi-Public/Institutional
-  Public Communications/Utilities
-  Educational
-  Parks/Recreational
-  Vacant



Source: Hillsborough County Property Appraiser, HDR

HART TOD Pilot Project

VACANT & UNDERUTILIZED LAND

Vacant and underutilized parcels are located throughout the study and vary greatly in size, extent of corridor frontage, and level of utilization. Generally, few fully vacant parcels exist along the project corridor, but a number of parcels with very low rates of utilization are present and may be well-positioned to promote transit supportive development.

For this analysis, parcels identified as vacant are those assigned a vacant land use code by the Hillsborough County Property Appraiser’s office. Rates of parcel utilization were established by comparing building improvement value and land value as reported in Property Appraiser records. Parcels with a low building improvement value to land value are identified as highly underutilized and those with a high building improvement value to land building value are identified as fully utilized. The darkest colored parcels shown on **Map 8** are considered highly underutilized. Only parcels over 1 acre were analyzed.

In the Downtown subarea, vacant and underutilized parcels are mostly zoned for Central Business District (CBD) and Planned Development (PD). CBD zoning does not set a maximum dwelling unit per acre density or floor area ratio. PD zoning allows for planned residential, commercial, industrial, and mixed-use developments.

In Tampa Heights, density maximums are less than those in the CBD, however, most of the parcels are zoned as Commercial General (CG), Commercial Neighborhood (CN), Planned Development (PD), or Residential Multi-Family (RM), which allow for medium densities and intensities.

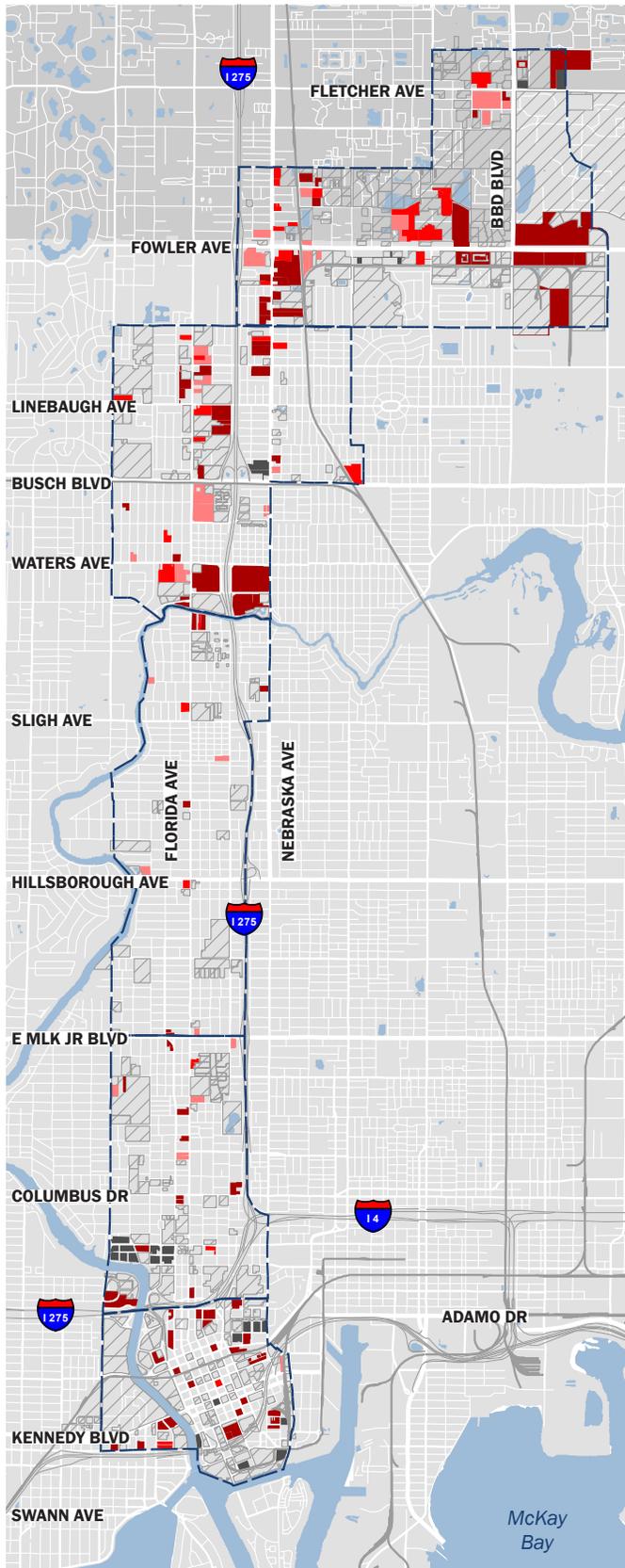
Seminole Heights generally shows higher building values along the corridor and within the neighborhood. Parcels fronting Florida Avenue in the subarea are zoned as Seminole Heights Commercial Intensive (SH-CN), which allows for mixed-use development.

Larger underutilized parcels can be found at the northern end of the study area, primarily along Fowler Avenue. Parcels facing the proposed BRT alignment in both the North Florida/Nebraska and Fowler/USF subareas are zoned under both City of Tampa and Hillsborough County as Commercial Intensive (CI), Commercial General (CG), Multi-Family, Planned Development (PD) and University-specific zoning (UC).





Map 8. Vacant & Underutilized Parcels



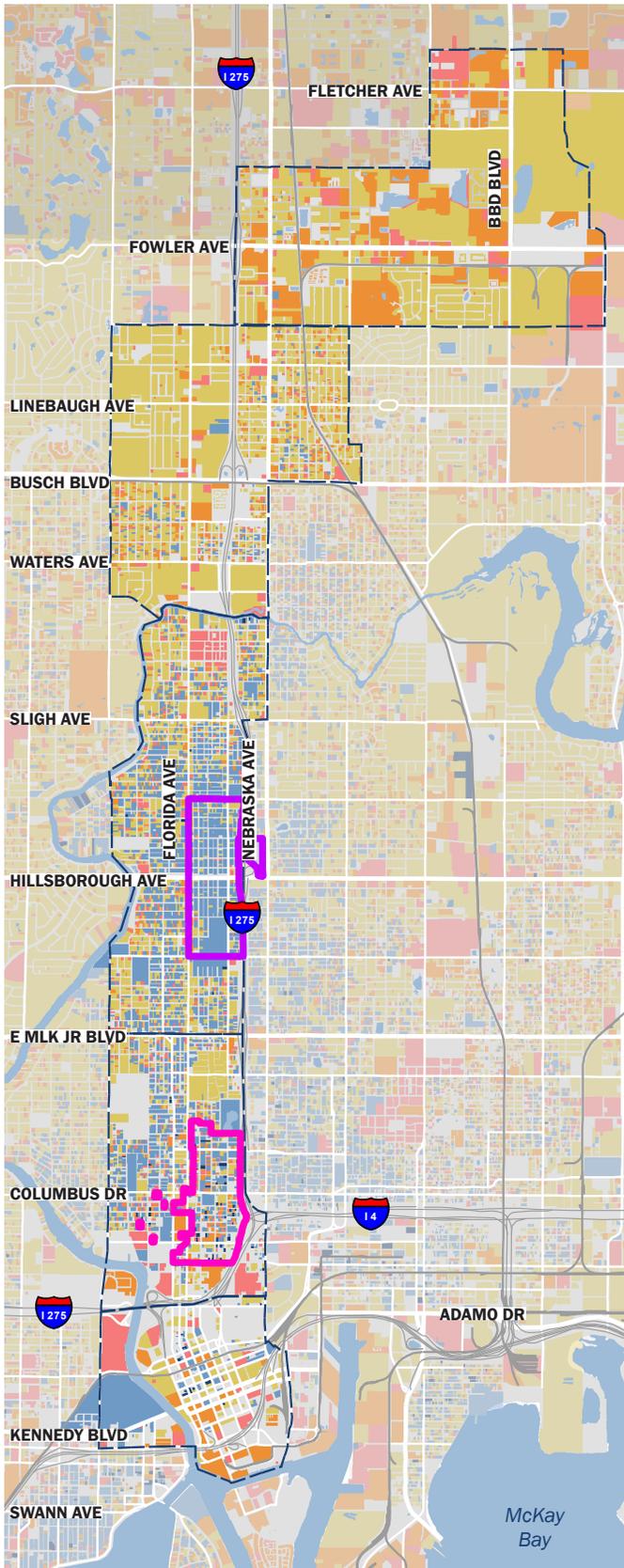
**Building Improvement Value
as a Percentage of Land Value**

-  Over 1 acre, filtered out
-  Vacant
-  0-50%
-  50-100%
-  100-150%



0 0.5 1 2 Miles

Source: Hillsborough County Property Appraiser, HDR



AGE OF CONSTRUCTION/LOCAL HISTORIC DISTRICTS

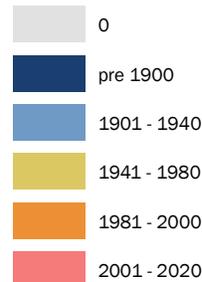
Age of building construction is another factor influencing a property’s competitive position and potential for conservation or redevelopment.

As shown in **Map 9**, age of building construction varies throughout the corridor, with the Downtown subarea being the most diverse. Broader age patterns can be seen in the subareas north of Downtown. Buildings constructed between 1901 and 1940 are clustered in the Tampa Heights and Seminole Heights subareas and mainly consist of single family homes. Buildings in the North Florida/Nebraska subarea were predominately constructed between 1941 and 1980 and have larger, primarily commercial building footprints. Newer buildings constructed after 1981 are found in the Fowler/USF subarea, and consist primarily of light commercial and multi-family uses.

This map also shows the limits of the Tampa Heights and Seminole Heights local historic districts. Properties within these districts as well as individual properties designated as Local Historic Landmarks are subject to preservation requirements administered by the City of Tampa Architectural Review and Historic Preservation Division.

Map 9. Age of Construction/Local Historic Districts

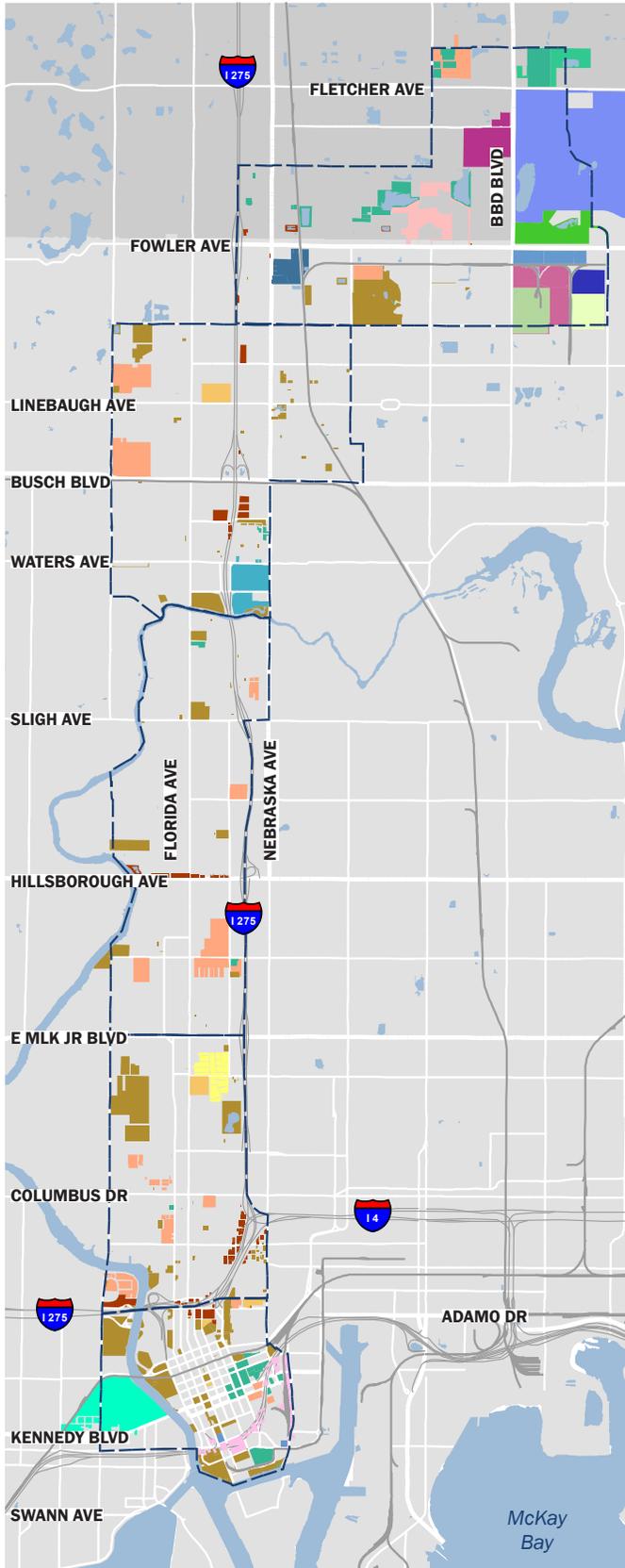
Age of Construction



Local Historic District



Source: Property Appraiser



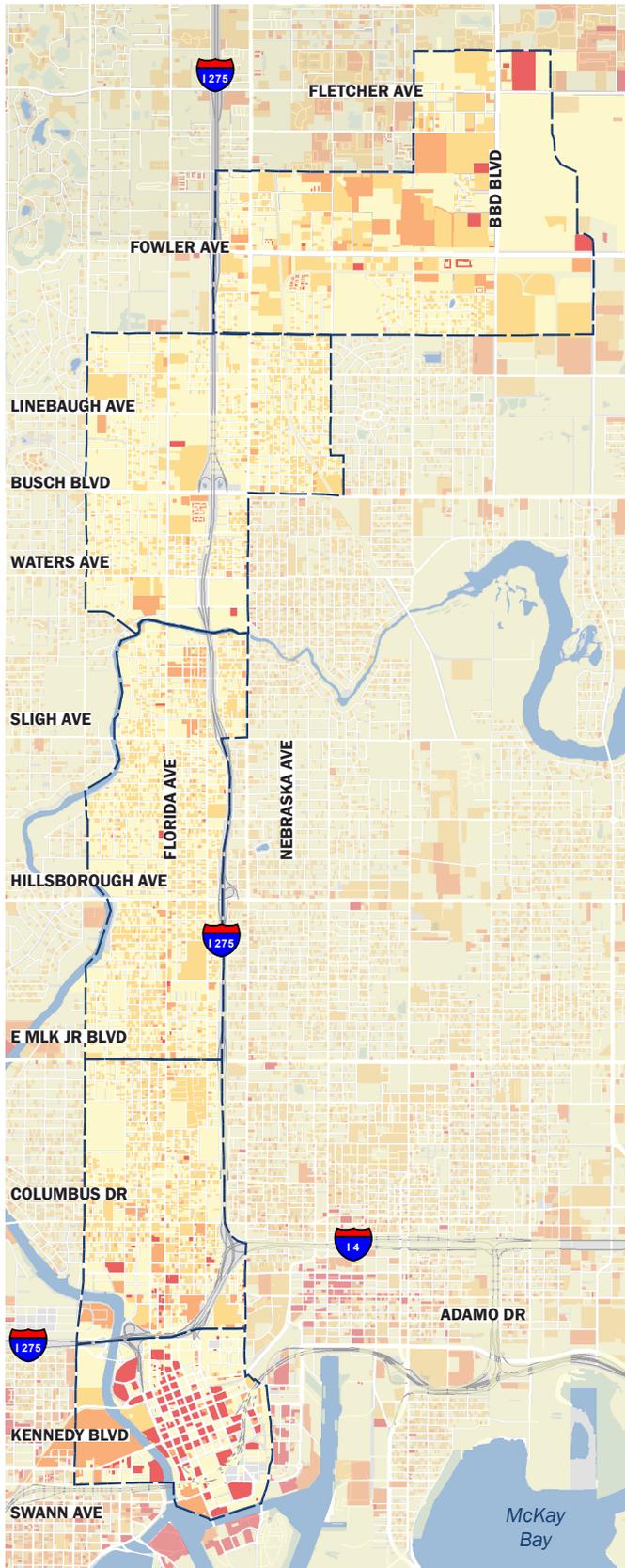
PARCEL OWNERSHIP

The top 20 land owners (by parcel/acre) within the study area are shown in **Map 10**. The largest single parcel land owner in the study area is the University of South Florida, and most of the larger footprint parcel owners can be found in this area. However, the City of Tampa owns the largest number of parcels spread throughout the study area. Large clusters of Hillsborough County School Board parcels can also be found through the study area. Other prominent land owners include FDOT and Robles Park LLC in Tampa Heights; TBDG Acquisition LLC (TGT Poker and Racebook), Diocese of St. Petersburg; and FDOT in the North Florida/Nebraska area; and Bottling Group LLC (Pepsi), Administration Hospital Veterans (James A. Haley Veterans Hospital), and Yuengling Brewing Company of Tampa Inc. in the Fowler/USF subarea.

Map 10. Top 20 Study Area Land Owners - Total Acreage

	OWNER	ACREAGE
1	TIITF/ University of South Florida	1563.97
2	City of Tampa	335.22
3	School Board Of Hillsborough County	190.60
4	Hillsborough County	113.42
5	University of Tampa	86.48
6	TIITF/State of Florida	50.08
7	Bottling Group LLC	49.05
8	Administration Hospital Veterans	47.74
9	Dept of Transportation	46.47
10	Yuengling Brewing Company of Tampa Inc	43.27
11	TBDG Acquisition LLC	37.86
12	University Mall Soho Owner LLC / Et Al	30.92
13	H Lee Moffitt Cancer Center And Research Institute	29.81
14	Tampa Hillsborough County Expressway Authority	29.17
15	Diocese of St Petersburg	29.02
16	Robles Park LLC	26.78
17	University Com Hosp	25.52
18	University of South Florida Research Foundation	24.95
19	Logan Properties Inc	23.46
20	Allegiance Healthcare Corp/ World Hdqtrs	20.19

Source: Property Appraiser



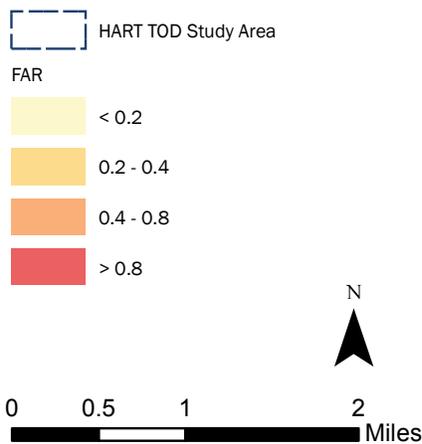
DEVELOPMENT INTENSITY

The development intensity of parcels is determined by calculating the Floor Area Ratio (FAR), which is a building's floor area in relation to the size of the parcel the building is located on. FAR calculations are used to indicate general levels of utilization within the study area. Usually, parcels with low FARs are considered to have higher potential to redevelop and those with higher levels of utilization are considered less likely to experience redevelopment pressure.

As shown on **Map 11**, the average development intensity within the study area is low, falling under 0.4 FAR. Typical suburban forms of development found along the corridor, such as automotive dealerships, shopping centers, in-line strip centers, and stand-alone commercial buildings on pad sites tend to fall into the lower-intensity categories. This is due in part to parking requirements and conventional development practices favoring single-story, single-use forms of development served by surface parking.

Although utilization rates are generally low, the analysis does show pockets where intensities are higher than average. Within the study area, the highest development intensities are located throughout the Downtown subarea, and in lesser portions of the Tampa Heights and Fowler/USF subareas.

Map 11. Development Intensity



Source: Property Appraiser



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FORM & CHARACTER

MÖGE TEE 愿茶

THE STANDARD

TOW AWAY ZONE
UNPAID PARKING
AT THE OFFICE
IS PROHIBITED
BY PERMIT ONLY

4. FORM & CHARACTER

The corridor represents a microcosm of the development story of many American cities. Downtown is a pre-automobile district that experienced rapid growth at the same time as pre-WWII investment in electric streetcars. Therefore, largely walkable and cohesive swaths of urban fabric can be found in this area. As one moves away from Downtown, there is a progressive unraveling of walkable conditions to the northernmost portions of the corridor, from the streetcar suburbs of Tampa Heights and Seminole Heights to the automobile-centric suburbs by USF. Fortunately, the corridor offers enough examples of pedestrian-oriented, transit-ready urban fabric to inspire redevelop strategies throughout the broader area.

4.1. TOD URBAN DESIGN ELEMENTS

The following icons represent urban design elements which are considered integral to transit-oriented development. In this section, each subarea is described based on how well the urban design elements are represented, or where there is room for improvement.



Pedestrians & Accessibility

Pedestrians need properly dimensioned sidewalks that allow for comfortable walking and a furniture or planting zone between the walking path and travel lanes. Such a zone allows for regularly spaced trees to be planted, light posts, and other physical barriers, that when combined with the curb, prevent automobiles from striking a pedestrian on the sidewalk.



Bicycle & Emerging Transport

To support greater use of bicycles there needs to be accommodations for the movement, storage, and repair of bicycles and other non-motorized or emerging transport vehicles. This may include protected bike lanes and intersections, preferential intersection treatments such as bike boxes and signals, buffered bike lanes, rent-a-bike stations, scooter and ginger pathways, and facilities such as repair shops.



Transit Facilities

For the health of the corridor it is crucial that there be well-located stops and stations, ones which have dignified shelters and sitting areas. The stops and stations should be co-located with amenities and higher residential density, and headways (the length of time a passenger has to wait between vehicles) should be reduced to optimize convenience.



Open Space & Community Nodes

Small parks and gathering spots, whether paved or planted, are important for the social strength of a neighborhood. Depending on the development intensity of the neighborhood, these can be created on empty lots. It is important that such spaces have natural surveillance and are secure at night to discourage negative behavior.



Comfortable Crossings

Along a corridor it is important that there are frequent opportunities to safely and legally cross the wider road as a pedestrian. This requires that there be clearly marked or textured crosswalks, that they be wide enough, and that when there is a traffic signal, that the signal cycle allows for sufficient crossing time. The presence of frequent, well-designed, and well operated crossings increases the confidence and safety of pedestrians.



Continuous Street Wall

For a pedestrian to want to walk along the length of a block, or for several blocks, a continuous street wall is needed. A 'continuous street wall' means that the facades are mostly unbroken with few gaps between them, except for the intersecting streets. Parking lots in front of the building, empty lots, and other gaps create a lack of visual interest for the pedestrian, making them feel exposed and vulnerable. It also signals that the corridor is automobile oriented or in a phase of disinvestment.



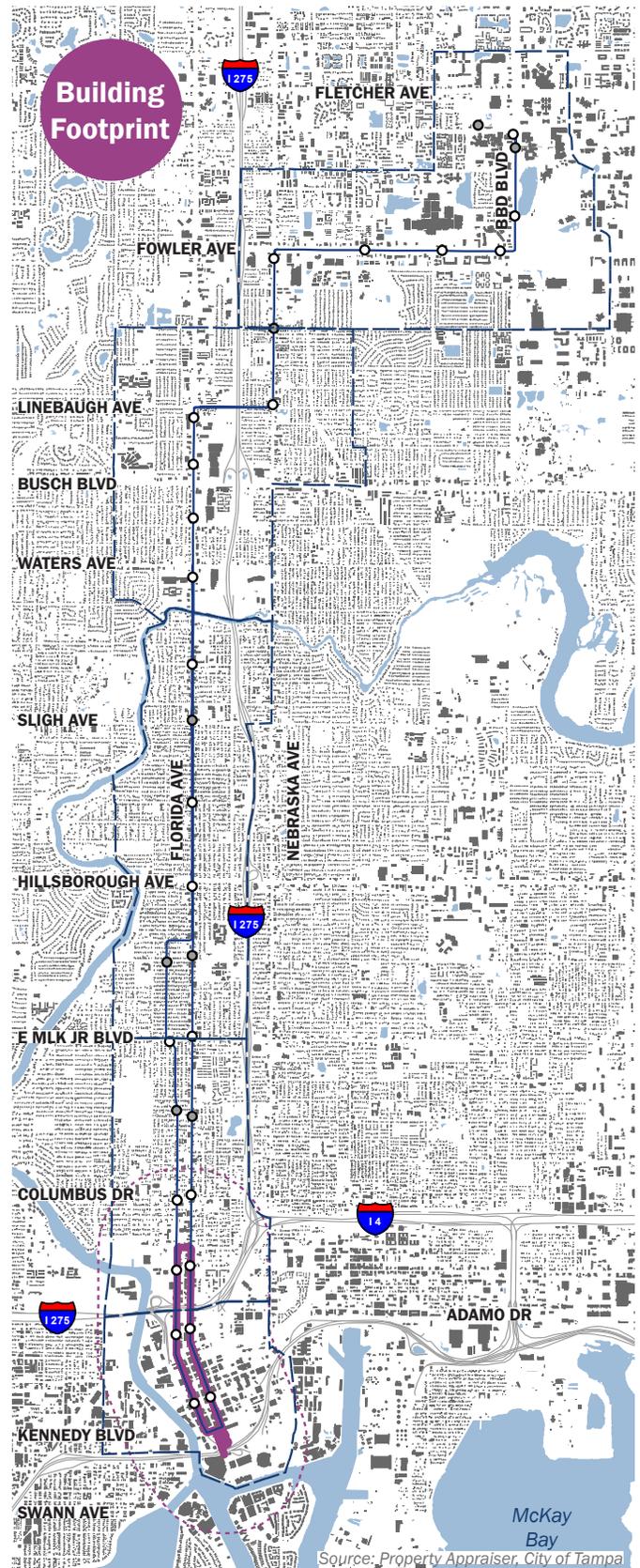
Transparency & Natural Surveillance

Along with a continuous street wall, another important quality to encourage pedestrian activity is natural surveillance, or 'eyes on the street.' This refers to facades which have a high percentage of untinted glazing and doors at ground floors, and abundant windows and balconies on upper floors. This allows for building inhabitants to naturally patrol the sidewalk and make sure that help is never far away for those who need it. The visual connection between building inhabitants and pedestrians along the sidewalk is one of the main ways to keep a district safe, especially at night.



Small Block Perimeter

Small Block Perimeter refers to blocks whose average perimeter is less than a five minute walk, or quarter mile. Small blocks imply that there are frequent intersections, which in turn, implies that there are multiple routes between any two destinations. Small blocks allow for increased pedestrian comfort by promoting human scale and reducing monotony. This also allows for natural traffic calming, as cars must approach each intersection cautiously, and therefore, can never accelerate to dangerous speeds.



4.2. DOWNTOWN

The Downtown Core is characterized by a fine-grained grid of blocks. Buildings are multi-story, and many are high-rises. A diverse array of uses are present. Parking is often located in structures, or along the curb. Residential densities combined with a significant amount of office and civic uses and ground floor retail provide for a vibrant pedestrian culture. Building frontages are connected directly to the sidewalk with shallow or non-existent front setbacks. Facades have a high degree of transparency and articulation, with a multitude of doors and windows facing the public realm. This form and character is found in the Downtown subarea of this study.



Pedestrians & Accessibility

Most sidewalks Downtown are wide enough to support intense pedestrian traffic. Most of the sidewalks have a planting and furnishing zone and a clear path, while some even have areas for outdoor dining. Overall, the pedestrian realm is of a high quality.



Bicycle & Emerging Transport

Though the quality of bicycle and other non-automobile infrastructure is stronger in Downtown than in other parts of the metropolitan region, there are still some high speed, high stress segments and intersections Downtown in the study area. This includes a lack of frequent safe crossings of major roadways such as Florida Ave and Tampa Street.



Transit Facilities

Several important transit lines converge Downtown, including buses and the streetcars. Transit shelters are dignified and comfortable, and where they are lacking, adjacent buildings serve as a refuge or shelter for waiting passengers.



Open Space & Community Nodes

Downtown has an abundance of plazas and parks such as Lykes Gaslight Park, Joe Chillura Courthouse Square, MacDill Park on the Riverwalk, the Riverwalk, and Curtis Hixon Waterfront Park.



Comfortable Crossings

Nearly every intersection has crosswalks, and most are wide enough to accommodate safe and comfortable crossing movement by pedestrians. Bulb-outs and other features shorten crossing distance. Downtown is a model of high quality crosswalk and intersection design.



Continuous Street Wall

Because of the densely built up urban fabric of Downtown, many streets exhibit a nearly continuous street wall, creating an uninterrupted experience for pedestrians, with relatively few gaps between buildings.



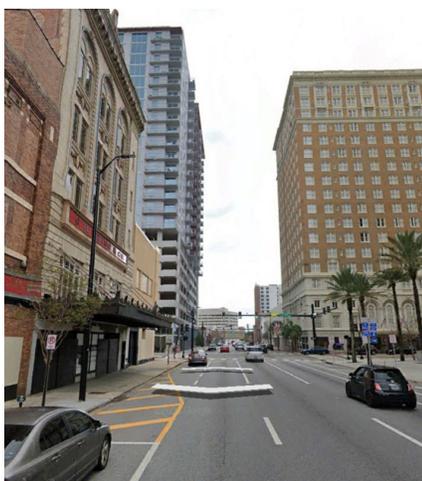
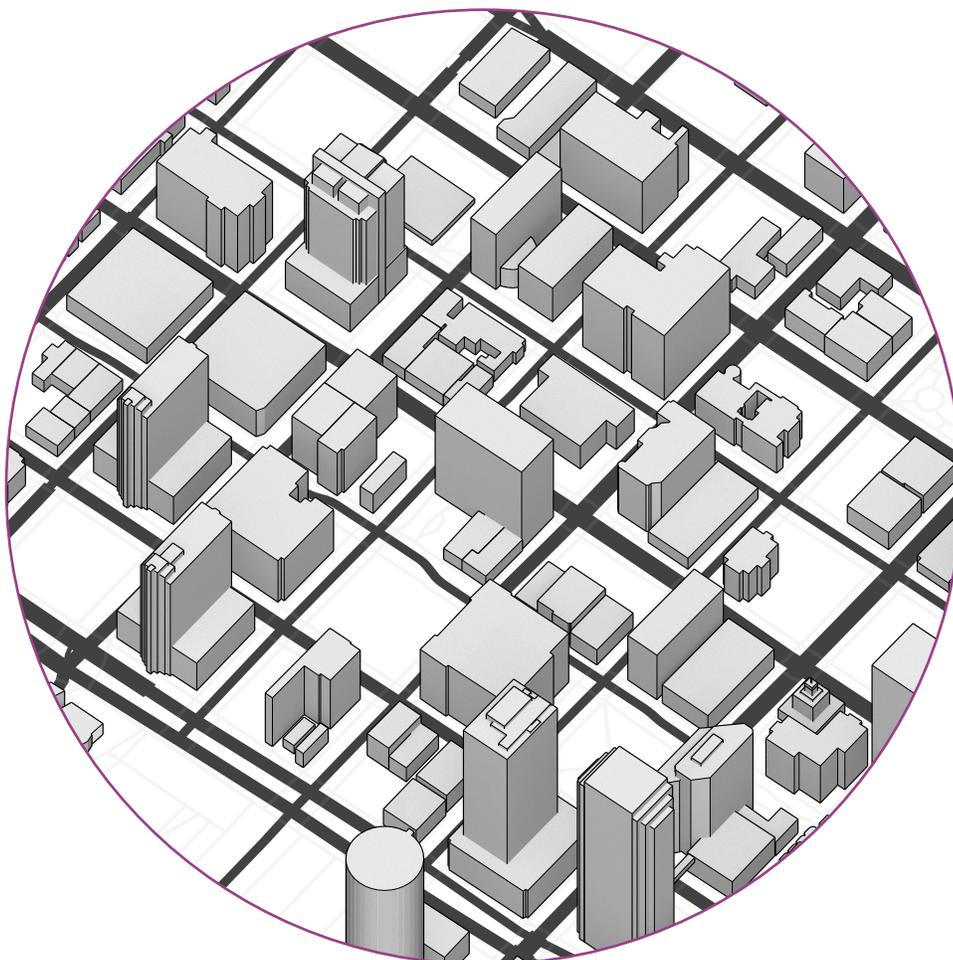
Transparency & Natural Surveillance

Though there are some buildings with blank walls or that lack habitable space facing the public realm, most of the block faces have a suitable degree of articulation and transparency with doors and windows creating a sense of 'eyes on the street'.



Small Block Perimeter

Because most blocks Downtown do not exceed three hundred feet along their longest edge, the perimeter of blocks is small enough to produce a healthy human scale and high degree of permeability. The tightly gridded core of the city has some of the smallest blocks observed in a major Floridian city.



Source: Google Maps Street View

4.3. TRADITIONAL MAIN STREET

The traditional main street fabric is characterized by a grid of blocks. Buildings are between one and three stories tall. There is a mixture of uses with consistent retail frontage at the ground floor and a few office and residential uses on upper stories for buildings of more than one story. Parking is located along the curb and in small surface lots located to the rear of buildings or screened from view. Buildings are connected directly to the sidewalk with shallow or zero front setbacks. Facades have a large amount of glazing for the display of merchandise and to entice customers into stores. Upper floors have windows to increase natural surveillance for the street. Recent developments may follow the pattern of shallow setbacks, but many times neglect to provide an adequately transparent ground floor. This form and character is generally found along North Franklin Street in the Downtown and Tampa Heights subareas.



Pedestrians & Accessibility

Most sidewalks in Tampa Heights are wide enough to support moderate pedestrian traffic. Most of the sidewalks are not wide enough to accommodate a planting and furnishing zone in addition to the clear path, and almost none are wide enough to fit outdoor dining within the right-of-way.



Bicycle & Emerging Transport

There are conventional bike lanes along Florida Avenue, Tampa Street, and Palm Avenue, but some are interrupted by driveways, curb cuts, and right turn lanes. Both Tampa Street and Florida Avenue can be restriped or redesigned to shorten right turn lanes and add a combination of on-street parking and protected or buffered bike lanes. Likewise Palm Avenue can be redesigned to increase cyclist safety. Sharrows could be implemented for the narrower streets in the district.



Transit Facilities

There are existing bus stops in the district. Tampa Street and Florida Avenue is planned to have premium transit stations in the future.



Open Space & Community Nodes

Tampa Heights has high quality park spaces such as Waterworks Park and Phil Bouquardez Park.



Comfortable Crossings

Most of the intersections have suitably designed crosswalks, but along Tampa Street and Florida Avenue, there are stretches of blocks that lack a crosswalk in the east-west direction. This presents an intimidating barrier for those seeking to access the Riverwalk or other mixed-use amenities and entertainment that are emerging along the river.



Continuous Street Wall

There is a section of blocks along Franklin Street which provide a continuous street wall experience and another that is emerging in the blocks defined by Palm, Oak, Seventh, Ola, and Highland Avenues. Elsewhere in the district, there are many disruptions to the continuous street wall in the form of empty lots, parking lots, and deep setbacks.



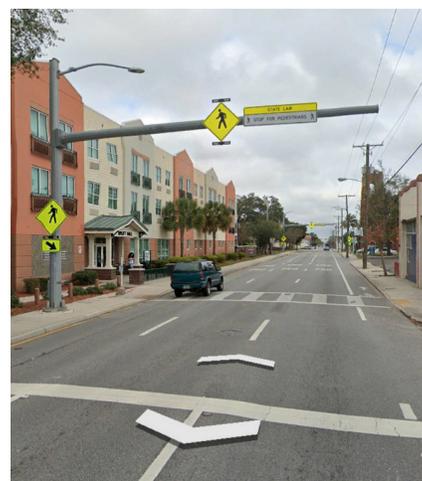
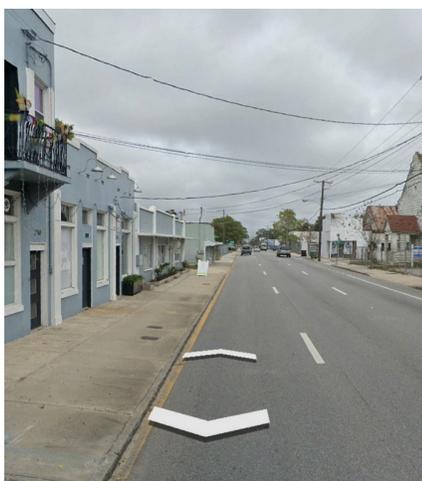
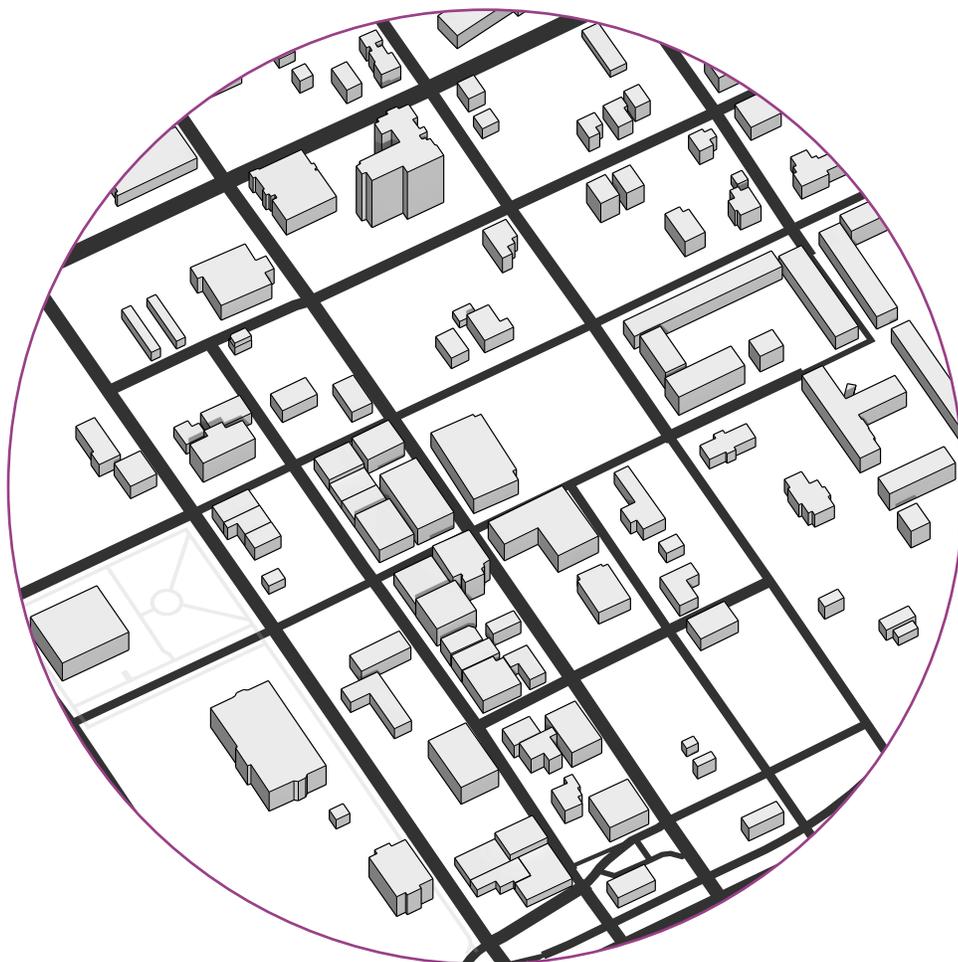
Transparency & Natural Surveillance

Some of the historic buildings along Franklin Street and the blocks along and south of Palm Avenue have a high degree of articulation and transparency. Both historic and newer developments exhibit an excellent level of natural surveillance built into the design, as evidenced by abundant doors, windows, and balconies facing streets and public spaces. However, there are other buildings that are blank.



Small Block Perimeter

The average perimeter of blocks is even smaller than that of Downtown, providing a high level of interconnectivity. The fine grained grid allows for multiple routes for pedestrians, cyclists, drivers, and transit users.



Source: Google Maps Street View

4.4. MID-CENTURY MAIN STREET / NHD CENTER

The mid-20th century corridor is characterized by mostly one-story buildings and some empty lots. Many of the empty lots have parking as their predominant use. There are automotive uses dispersed with other retail uses. Parking may be configured as one or two rows of head-in or angled parking in front of the building facade, or off to the side of the building, often disrupting the pedestrian experience. Single-story houses are located behind the commercial corridor, which is about one lot deep. This form and character is generally found in the Tampa Heights and Seminole Heights subareas of this study.



Pedestrians & Accessibility

Sidewalks are rather narrow and do not have a planting and furnishing zone. Pedestrians are forced to walk along the high speed travel lane without the buffering benefit of on-street parking and street trees. Furthermore, head-in parking and curb cuts that traverse the sidewalk reduce the comfort and safety of pedestrians.



Bicycle & Emerging Transport

There is a southbound conventional bike lane along most of Tampa Street and a northbound conventional bike lane along most of Florida Avenue. While these are better than having no bicycle infrastructure at all, there is room for improvement.



Transit Facilities

There are bus lines along the corridor. Headways are proposed to be reduced in the future, and vehicles and transit station shelters are proposed to be upgraded.



Open Space & Community Nodes

There are few parks and plazas that are in easy walking distance to the corridor. Memorial Middle School and Hillsborough High School do have play fields that could become community open space if used after school hours. Several blocks east of Florida Avenue and adjacent to I-275 is Robles Park. Several blocks west of Tampa Street are a string of contiguous open spaces such as Calvin Taylor Park, Woodlawn Cemetery, and Plymouth Playground. Henry & Ola Park is located several blocks west of the corridor. American Legion Park, at the intersection of Sligh and Florida Avenues, is located directly on the corridor.



Comfortable Crossings

There are very few crossings in the east-west direction across Florida Avenue and Tampa Street, making it a barrier to movement for pedestrians. However, nearly every street has a well-marked crosswalk in the north-south direction. The few east-west crossings are located at Florida Avenue intersections at Broad Street, Sligh Avenue, Hillsborough Avenue, Osborne Avenue, MLK Blvd, Lake Avenue, Floribraska Avenue, and Columbus Drive. There are often five to fifteen blocks between crosswalks.



Continuous Street Wall

There are a few spots where a street wall is emerging, but it is not continuous. This part of the corridor is characterized by frequent gaps and interruptions in the form of surface parking lots, empty lots, and deep setbacks.



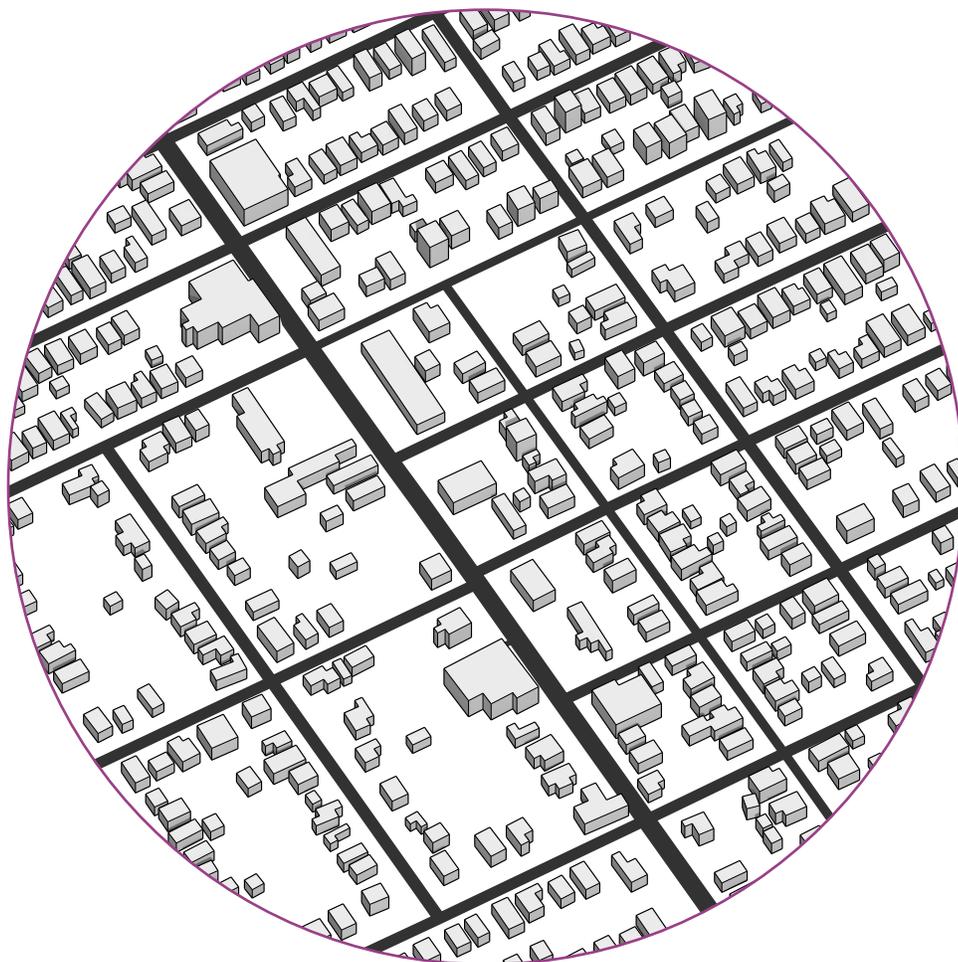
Transparency & Natural Surveillance

Some of the mid-century and historic buildings, as well as new mixed-use development exhibit a high degree of transparency and natural surveillance, while much of the corridor suffers from blankness or other visual obstructions between the building and the sidewalk, which may erode pedestrian safety and confidence.



Small Block Perimeter

Block perimeters are small enough so that pedestrians, cyclists, and drivers have diverse options for moving around the district and a healthy dispersal of traffic. The scale of the grid is rather ideal for creating addresses, and for natural traffic calming associated with short block faces.



Source: Google Maps Street View

4.5. AUTO-ORIENTED COMMUNITY CENTER

The automobile oriented community center is characterized by larger footprint stores set back behind multi-acre parking lots. There is still a high degree of transparency facing the parking lot, but the other sides of the building tend to have blank walls. Buildings tend to be single story. Out-parcels are developed as banks, drive-through restaurants, gas stations, and other uses and configurations that are primarily geared to serve drivers rather than pedestrians and transit users. Blocks are large and provide few routes for pedestrians, drivers, and cyclists. This form and character is generally found in the North Florida/Nebraska subarea of this study.



Pedestrians & Accessibility

Sidewalks are rather narrow and do not have a planting and furnishing zone. Pedestrians are forced to walk along the high speed travel lane without the buffering benefit of on-street parking and street trees. Busch Blvd lacks sidewalks. Intrepid pedestrians have created paths in the gravel and grassy verges or use the train tracks as their pathway.



Bicycle & Emerging Transport

There is a southbound and northbound conventional bike lane along Florida Avenue and none along Busch Blvd. Cyclists are exposed to high speed and dangerous automobile traffic. North of Busch Blvd, Florida Avenue lacks bike lanes.



Transit Facilities

There are bus lines along the corridor. Headways are proposed to be reduced in the future, and vehicles and transit station shelters are proposed to be upgraded. Currently there are no dignified shelters or seating areas for transit users.



Open Space & Community Nodes

With the exception of Forest Hills Park and Chamberlain High School's play fields located several blocks west of the corridor, there is a dearth of public open spaces in this part of the corridor. South of Fowler Avenue, Copeland Park is one of the only green spaces accessible from Fowler Avenue.



Comfortable Crossings

There are very few crossings in the east-west direction across Florida Avenue, making Florida Avenue a barrier to movement for pedestrians. Busch Blvd suffers from the same problem. Large intersections such as that of Florida Avenue and Busch Blvd do have crosswalks. In addition to that intersection there are crosswalks at Bird Street, Waters Avenue, and Yukon Street North of Busch Blvd, there are crosswalks in the east-west direction across Florida Avenue at Linebaugh Avenue, Bougainvillea Avenue, and Fowler Avenue, between which it is difficult and unsafe to attempt crossing Florida Avenue.



Continuous Street Wall

There are no block faces that exhibit a continuous street wall. Deep setbacks and large surface parking lots located in front of buildings characterize the area.



Transparency & Natural Surveillance

Some of the buildings exhibit a high degree or medium degree of transparency, but the deep setbacks prevent them from being useful as a natural surveillance technique.



Small Block Perimeter

Some blocks are human scaled and have small perimeters while many of the commercially-oriented blocks are super blocks and exhibit a lack of permeability, forcing traffic onto a few overburdened intersections.



Source: Google Maps Street View

4.6. AUTO-ORIENTED REGIONAL CENTER

Regional shopping centers are located on the largest superblocks that offer little permeability. An enclosed mall has very little transparency and articulation, presenting blank walls to the community. Buildings are mostly single story. They are set back behind acres of parking. Out-parcels are developed with mostly driving customers in mind. Large signs are scaled to catch the attention of the driver rather than the pedestrian or transit user. Because of the large parcel size and single-use zoning, or predominance of commercial zoning, residences are located often beyond a comfortable strolling distance from retail, forcing most customers into their cars to satisfy their daily needs. This form and character is generally found in the Fowler/USF subarea.



Pedestrians & Accessibility

Sidewalks are rather narrow, but they do have a planting and furnishing zone. However, the planting zone is completely barren and devoid of street trees.



Bicycle & Emerging Transport

There are east and westbound conventional bike lanes along Fowler Avenue but they run alongside eight lanes of higher speed automobile traffic and are discontinuous at intersections.



Transit Facilities

There are bus lines along the corridor. Headways are proposed to be reduced in the future, and vehicles and transit station shelters are proposed to be upgraded. Currently there are dignified shelters and seating areas for transit users.



Open Space & Community Nodes

South of Fowler Avenue, Copeland Park is one of the only green spaces accessible from Fowler Avenue.



Comfortable Crossings

There are very few crossings in the north-south direction across Fowler Avenue. The ones that do exist are located at Nebraska Avenue, 15th Street, 22nd Street (Mall Entrance), 30th Street/Bruce B. Downs Blvd, and USF Gateway (Spectrum Blvd and Leroy Collins Blvd).



Continuous Street Wall

There are no block faces that exhibit a continuous street wall. Deep setbacks and large surface parking lots located in front of buildings characterize the area.



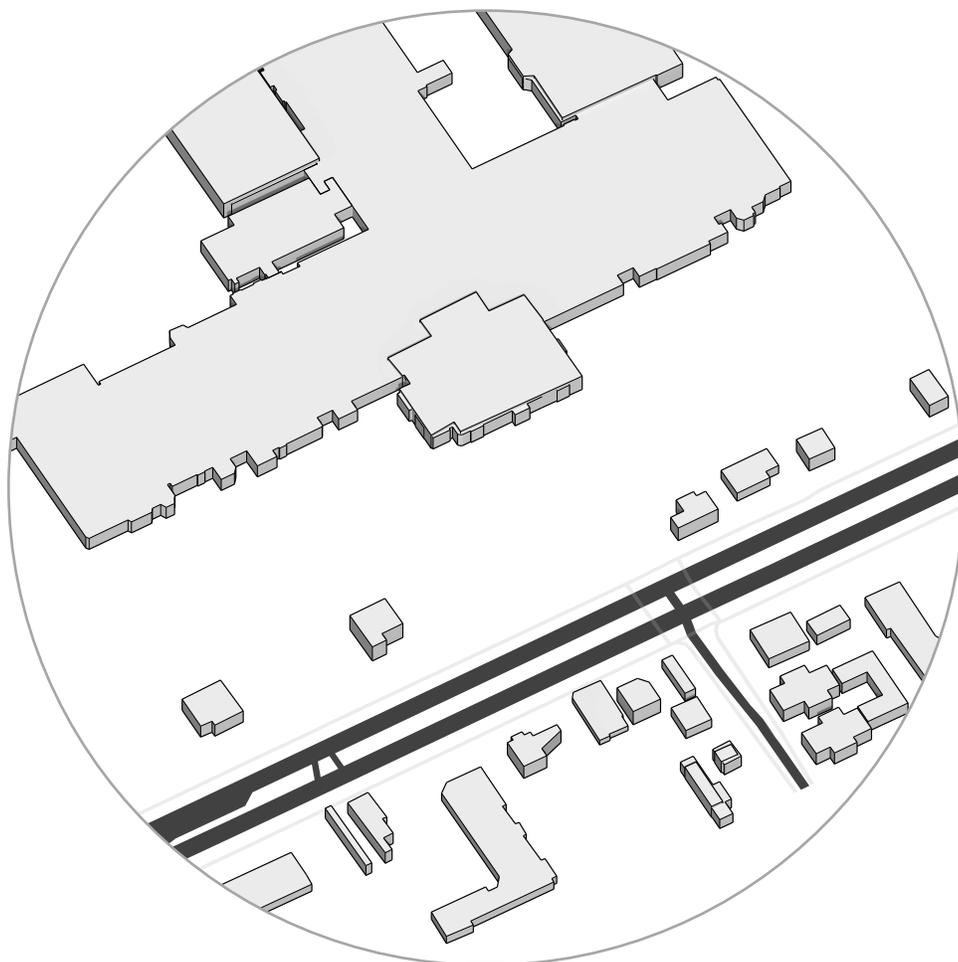
Transparency & Natural Surveillance

Some of the buildings exhibit a high degree or medium degree of transparency, but the deep setbacks prevent them from being useful as a natural surveillance technique.



Small Block Perimeter

Nearly every block along the corridor suffers from excessively large perimeters, leading to a low degree of impermeability. Traffic is forced onto a few multi-lane thoroughfares such as Fowler Avenue instead of dispersed on a finely grained grid.



Source: Google Maps Street View





MOBILITY & ACCESSIBILITY

HART
MILLSBOROUGH AREA REGIONAL TRANSIT AUTHORITY
BUS STOP
1
www.goHART.org
HART Info Line: (813) 254-4278

5. MOBILITY & ACCESSIBILITY

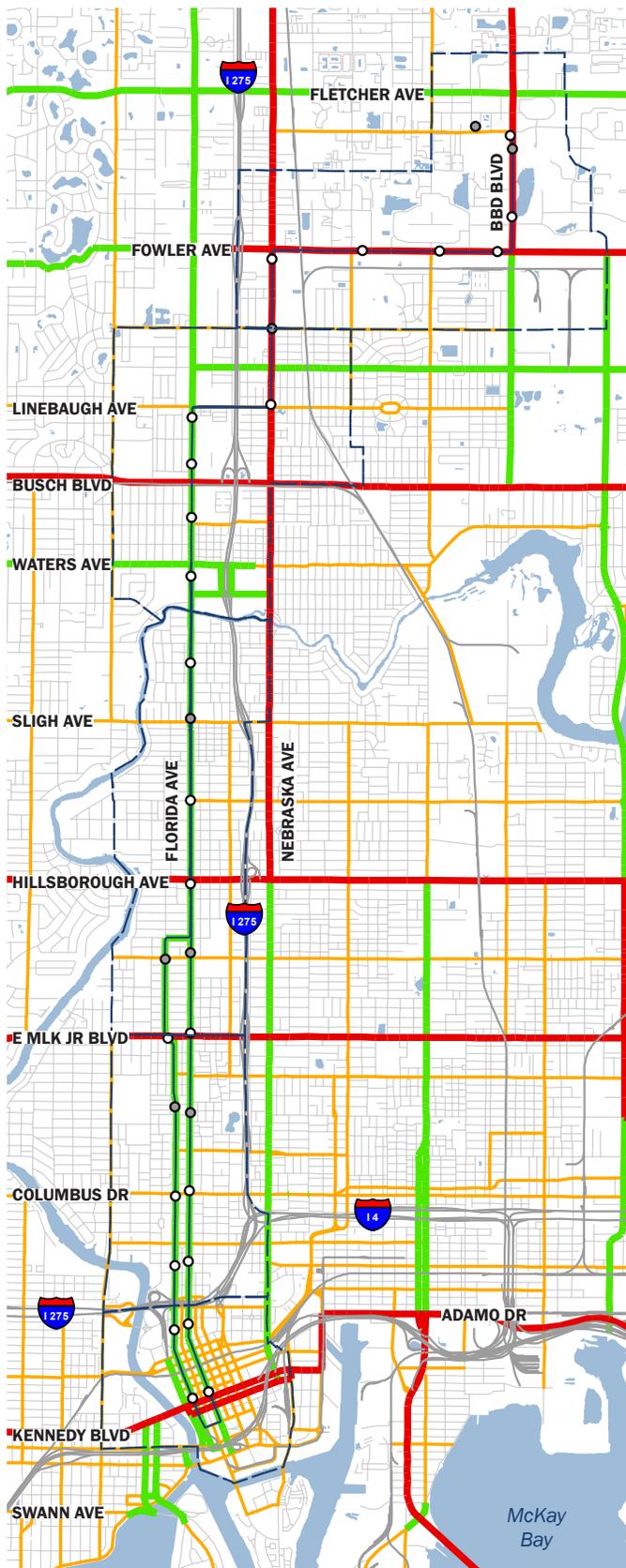
The following section documents existing mobility networks and transportation accommodations within the study area. As levels of transit accessibility, walkability, and bikability are key features of successful TODs, this section focuses heavily on non-motorized forms of transportation. In addition to providing safe access to transit services, forms of active transportation provide tangible community benefits by increasing daily physical activity levels, reducing pollution, increasing exposure to local businesses, and improving social well-being and sense of community.

5.1. ROAD NETWORK

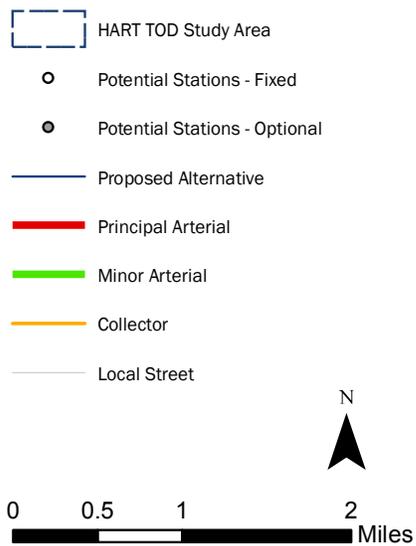
As shown in **Map 12**, the existing road network throughout the study area maintains a grid pattern. South of Linebaugh Avenue, the proposed BRT alignment primarily runs along Minor Arterials—Tampa Street and Florida Avenue. North of Linebaugh Avenue, the alignment runs along Principal Arterials—Nebraska Avenue, Fowler Avenue, and Bruce B. Downs Blvd. Many of the intersecting roads along the corridor are classified as Collector roads.

Other Principal Arterials in the area include Kennedy Blvd in the Downtown subarea, Hillsborough Avenue in the Seminole Heights subarea, and Busch Blvd in the North Florida/Nebraska subarea. Minor Arterials in the area include Waters Avenue in the Seminole Heights subarea, Bougainvillea Avenue in the North Florida/Nebraska subarea, and Fletcher Avenue in the Fowler/USF subarea.





Map 12. Roadway Functional Classification



Source: City of Tampa

5.2. TRANSIT SERVICE

BUS ROUTES

HART currently operates 23 HART bus routes that intersect the proposed BRT alignment (**Map 13**). Fourteen of these routes have existing stops along the proposed BRT alignment. They are as follows:

- Route 1: Florida Avenue
- Route 5: 40th Street
- Route 6: 56th Street - A
- Route 14: Armenia/Howard Avenue
- Route 15: Columbus Drive
- Route 16: Waters Avenue
- Route 19: South Tampa
- Route 24: Fishhawk - South Tampa LX
- Route 32: Dr Martin Luther King Jr Blvd
- Route 34: Hillsborough Avenue
- Route 39: Busch Blvd
- Route 42: University Area Connector
- Route 275: New Tampa Limited Express - C
- Route 400 MetroRapid - Nebraska Avenue

According to HART’s Productivity and Ridership data for FY 2019 (December YTD), the routes listed in **Table 1** are the top performing systems routes. Seven of the ten top performing routes intersect with the proposed BRT alignment. They are bolded and color-coded in the table below.

Table 1. Top 10 Existing Bus Routes by Ridership (along BRT Proposed Route)

ROUTE	RIDERSHIP (FY 2019)
6 -56th Street	330,274
400 - Nebraska-Fletcher MetroRapid	289,890
1 - Florida Avenue	256,555
34 - Hillsborough Avenue	255,096
12 - 22nd Street	218,119
39 - Busch Boulevard	164,024
5 - 40th Street	109,253
8 -Progress Village/Brandon	102,938
42 - Fowler Avenue	99,476
37 - West Brandon/Netp@rk	94,522

Source: HART

BUS STOPS—BOARDING

HART weekday bi-directional boarding and alighting data from Fall 2019 was used to determine passenger activity at existing stops along the proposed BRT alignment. This analysis showed that the Marion Transit Center (MTC), located in Downtown Tampa, had the most passenger activity with 609 total daily passengers. After the MTC, the areas with the most activity were located at Florida Avenue where it intersects with Hillsborough Avenue, Waters Avenue, and Busch Blvd. **Table 2** shows the top 10 existing stops with the most passenger activity.

TRANSFER FACILITIES

Along the BRT proposed alignment, the main hub for HART is the MTC, serving 16 local and express routes from 17 bus platforms. The MTC is at the northern end of the Marion Street Transitway, which was constructed in 1989 as a “fare free” zone (though the designation was eliminated in 2008).

Additionally, the University Area Transit Center (UATC), located in the USF area, was constructed in the late 1990s. It is the transfer point for 10 local bus routes. This facility includes bus shelters, restrooms, and a customer service center. Prior to the UATC’s construction, HART spent several years considering different locations as a transfer point in the University area, including University Mall.

Table 2. Top 10 Existing Stops Along the Proposed BRT Alignment with the Most Weekday Passenger Boarding/Alighting (Fall 2019)

ROUTE	DIRECTION	STOP NAME	TOTAL
1	Inbound	1 - Marion Transit Center	609
34	Inbound	51 - Hillsborough Ave @ Florida Ave	234
1	Inbound	33 - Florida Ave @ Waters Ave	228
34	Outbound	22 - Hillsborough Ave @ Florida Ave	221
1	Outbound	29 - Florida Ave @ Waters Ave	203
39	Inbound	29 - Busch Blvd @ Florida Ave	201
1	Inbound	17 - Florida Ave @ Hillsborough Ave	199
39	Outbound	42 - Busch Blvd @ Florida Ave	179
1	Inbound	37 - Florida Ave @ Busch Blvd	179
1	Outbound	44 - Florida Ave @ Hillsborough Ave	171

Source: HART

5.3. ACTIVE TRANSPORTATION

Active transportation is an important part of a successful TOD environment. Pedestrians, and to a lesser extent cyclists, are transit users. Assessing the pedestrian and cyclist environments in the existing conditions can inform the context for the station site areas.

PEDESTRIAN CONDITIONS

The pedestrian experience is characterized by it's "walkability", or how walkable an area is. According to the Institute for Transportation and Development Policy, there are 11 indicators for measuring walkability including:

- **Walkways.** Complete, continuous sidewalks with protection from vehicles that are accessible to all people including ADA needs;
- **Crosswalks.** Connects the sidewalk network across vehicle traffic, while being accessible and compliant with ADA needs;
- **Physically Permeable Frontage.** Sidewalks with continuous ground floor activity and services, with limited zones of inactivity, making sidewalks attractive for walking and not crime;
- **Small Blocks.** Reducing trip distance, making walking more convenient;
- **Prioritized Connectivity.** Connections to destinations prioritizing walking above other modes, while also making walking more convenient than other modes;
- **Complementary Uses.** A mix of land uses located closer together between homes and services, encouraging more trips by foot;
- **Access to Local Services.** Concentration of basic human services within easy walking distances;
- **Driveway Density.** Minimize locations where pedestrians cross paths with vehicles while walking along sidewalks, increasing safety and comfort; and
- **Roadway Area.** Minimize area given to vehicles to encourage slower car speeds and volumes, avoiding severe and fatal accidents with pedestrians.

The condition and quality of each of these indicators helps to influence walking behavior, which is a critical first- and last-mile mode for transit use.

Coverage of sidewalks or walkways in Tampa and Hillsborough County is a challenge that each agency is working to address. Hillsborough County is planning to fill the gaps of 1,400 miles of sidewalk if funding is received through the recently citizen approved surtax for transportation improvements¹.

The project corridor has 333 miles of potential sidewalk coverage with 162 miles having existing sidewalk coverage on one or both sides of the street. The remaining miles, 151 or 45%, do not have any sidewalk coverage and five miles are planned sidewalk coverage.

BICYCLE CONDITIONS

Bicyclists also require safe, accessible, and connected routes to get to transit stations. According to the *Federal Transit Administration's Manual on Pedestrian and Bicycle Connections to Transit (2017)*, this includes paths, bike lanes, separated bike lanes, or low-stress local streets in addition to crossings and wayfinding signage. The type of bike facilities needed to connect to transit depends on context. According to the *Federal Highway Administration's Bikeway Selection Guide (2019)*, the higher the speed and volume of a road, the more protective the recommended bikeway should be. Shared lanes or bicycle boulevards are recommended for the lowest speeds and volumes; bike lanes are recommended for low speeds and low-to-moderate volumes; and separated bike lanes or shared use paths are recommended for moderate-to-high speeds and high volumes.

The type of facilities on the corridor are a mix of bicycle lanes and on-street facilities, or sharrows. Where the route begins on Florida Avenue in Downtown Tampa, the bikeway is predominantly bike lanes with some segments of on-street facilities. North of Downtown Tampa the bikeway is bicycle lanes until Violet Street. There are no facilities between Violet Street and Waters Avenue. At Waters Avenue bicycle lanes begin again north to Linebaugh Avenue. Where the route turns east on Linebaugh Avenue there are no on-street facilities until Nebraska Avenue. There are no facilities on Nebraska Avenue until the route meets Fowler Avenue where bike lanes begin again, east and follow north on Bruce B. Downs Blvd where the route ends. Going back south on the route where it segways onto Tampa Street, bike lanes are available until the route circles back to Florida Avenue.

LEVEL OF TRAFFIC STRESS

Pedestrian

A pedestrian level of traffic stress (LTS) methodology was created for the Hillsborough MPO to conduct a network-level assessment of existing walking conditions on streets within the County. A pedestrian LTS analysis uses a "weakest link" method of assigning stress level. The factors

1 - <http://www.planhillsborough.org/wp-content/uploads/2017/10/LRTP2045-HMPO-ADA.pdf>



include: presence of sidewalk, speed of traffic, volume of traffic, number of vehicular lanes, degree of separation from traffic, and frequency of pedestrian crossings.

As shown in **Map 15**, the LTS score ranges from 1 to 4 and represents the following conditions for able-bodied persons of all ages:

- **LTS 1:** Safe, well-connected, comfortable sidewalk network
- **LTS 2:** Safe, well-connected sidewalk network
- **LTS 3:** Safe sidewalk network
- **LTS 4:** Sidewalk gaps create potentially unsafe conditions

The pedestrian LTS methodology does not address Americans with Disability Act (ADA) compliance. All pedestrian facilities should be ADA compliant. Local agencies should refer to their ADA transition plans for existing barriers and methods to address them.

Bicycle

The bicycle LTS methodology was also applied to conduct a network-level assessment of existing bicycle conditions on streets within the County. The LTS analysis uses a “weakest link” method of assigning stress level; this reflects the reality that people on bikes experience the various types of traffic stress (speed of traffic, volume of traffic, degree of separation from traffic, incursions into their space) simultaneously. If even one of these factors is excessive, the whole street segment is a high stress experience for most potential riders.

The bicycle LTS score ranges from an LTS 1, which is comfortable for most of the general population, to an LTS 4, which is uncomfortable for even experienced bicyclists (**Map 17**). The LTS scores can help plan a complete bicycle network that is useful to the general population, leverage low stress streets that are already comfortable for most people, and help identify the appropriate bicycle facility based on key characteristics of the street.

For more information of the methodology used to determine pedestrian and bicycle LTS, see the Hillsborough MPO’s 2018 report: *Evaluating Bicycle and Pedestrian Quality of Service*.

STATION ACCESS SHEDS (WALK/BIKE)

An access shed is the area around a point to which a person would travel. There are several types of access sheds including pedestrian sheds, walk sheds, walkable catchment (or the distance a person will walk), and bike sheds. These sheds provide insight on how many people may utilize transit service when the focal point is the station or stop. Considering the conditions within the sheds is important due to this relationship and understanding if the population has a reasonable travel path to and from the station². According to the FTA, “All pedestrian improvements located within one-half mile and all bicycle improvements located within three miles of a public transportation stop or station shall have a de facto physical and functional relationship to public transportation.”

Given the importance of these sheds, a brief overview of each of the proposed station access sheds follows. There are several proposed and optional stations, so this review is organized by the subareas described in the beginning of this report.

In assessing the access sheds, coverage and quality of facilities will be reviewed. To assess quality the following factors will be considered:

- **Sidewalks.** Per AASHTO, there are three sections to a sidewalk including the buffer zone, pedestrian zone (unobstructed and minimum 4 feet wide on low volume locations, 6-8 feet wide on arterials and 8-10 feet wide in city centers) and frontage zone. See **Map 14**.
- **Bicycle Facilities.** Type of facilities within the three mile buffer of the access shed. All streets were factored into the bike shed, regardless of infrastructure. See **Map 16**.

In addition other conditions such as visible crossings (every 300-400 feet) and wayfinding will also be noted.

² - <https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/research-innovation/64496/ftareportno0111.pdf>

HART TOD Pilot Project

Downtown

Within the Downtown subarea there are two sets of stops with similar walking and biking conditions. Around the Kennedy Blvd stops, there is complete sidewalk coverage within both the quarter and half mile walk shed for this station. There are sidewalks on both sides of the roadways throughout the walk shed. Additionally they appear to be wide enough to accommodate all of the sidewalk zones, with more than 10 feet wide unobstructed through-zones. Bike lanes are available on both Florida Avenue and Tampa Street. Additionally, within the bike shed, there are other bike lane facilities, on-street markings, an off-street facility, and a cycle path that can be used for accessing the stop. Marked crossings are visible and available at all of the intersections in the dense street grid.

The conditions around the Fortune Street stops continue to have almost complete sidewalk coverage in the walk shed. The exception is the northwest and southwest quadrant of the quarter mile shed. Sidewalk widths begin to change and appear inconsistent within the shed with some ranging between 6-8 feet wide and others 10 or more. Also, some areas appear to have obstructed sidewalks. Bicycle lanes continue on the route through this bike shed and are in proximity to other facilities such as on-street facilities, off-street facilities, and the cycle path. Marked crossings are available in the bike shed though not consistently at every intersection and some have reduced or warned visibility.

Tampa Heights

Within the Tampa Heights subarea there are three sets of stops and one potential stop set. The conditions around the first two sets begin to show differences in comparison with the Downtown stops. Around 7th Avenue, there is almost complete sidewalk coverage in this walk shed. The northwest quadrant of the half mile walk shed of this station has no sidewalks in a few smaller street locations. The sidewalk widths range from 6-8 feet wide where available. There are areas where the sidewalk pedestrian zone is obstructed and also the slopes are not consistent. Marked crossings are sparse in this walk shed with many being worn or with reduced visibility. There is a mid-block crossing available on Palm Avenue between Florida Avenue and Tampa Street, seen in the image above. Bike lanes continue on Florida Avenue and Tampa Street and other facilities in close proximity include bike lanes on Palm Avenue, North Avenue, and Nebraska Avenue.

The conditions around Columbus Drive demonstrate that moving farther away from the Downtown area the sidewalk coverage begins to change. This walk shed still has substantial coverage within the quarter mile area,



Downtown: Florida Avenue south before I-275



Tampa Heights: Palm Avenue Mid-block Crossing

with one gap on Gladys Street between Florida Avenue and Tampa Street. Going into the half mile area, more gaps start to appear in the northwest quadrant and also in the northeast quadrant. Farther north in Tampa Heights coverage substantially deteriorates. This area still has access to bike facilities on Florida Avenue and Tampa Street providing north/south connectivity. However, east/west facilities are limited.

Seminole Heights

The sidewalk coverage around the next five station areas is increasingly limited, most of the area doesn't offer consistent north/south and east/west access to these areas other than on the major roadways like Hillsborough Avenue. The neighborhoods linking to these roadways lack consistent connectivity to these stops which may be a challenge for safety and for users with ADA needs. The sidewalks that do exist along Florida Avenue are narrow, at times obstructed, and there are several curb cuts and retail strips with parking along the front of the building. Additionally, crossings are limited and the distance between signals may cause pedestrians to cross mid-block.



There are no longer on-street designated bicycle facilities along Florida Avenue within this station area and the roadway operations are now two-way. North/south bicycle options are limited here but there are three east/west connections including bike lanes on Hillsborough Avenue.

North Florida/Nebraska

Lack of sidewalk coverage continues in this subarea with the most connectivity available on the major roads. Neighborhood roads leading to the stops have little to no sidewalk coverage. This area is less dense compared with the other subareas in terms of residential development. There are also a few surrounding areas leading to the stops which have private development supported sidewalks. where the proposed BRT alignment goes east on Linebaugh Avenue, full sidewalk coverage is limited to the north side of the roadway. The south side does not offer consistent coverage with breaks due to worn or deteriorating segments as shown above.

Where the route continues on Nebraska Avenue there is sidewalk coverage on both sides of the roadway. There are unprotected bike lanes on Florida Avenue again between Waters Avenue and Linebaugh Avenue. The closest east/west route is a shared facility north on Bougainvillea Avenue. Linebaugh Avenue is a shared facility also from Central Avenue to Nebraska Avenue. Along this segment development contains majority strip malls with parking in the front and many driveways and curb cuts. Also, crossings are only available at the signals which force users to travel considerable distances in between each traffic light.

Fowler/USF

The final subarea has four potential station areas located along a major commercial corridor with three through lanes in both directions. Sidewalks along Fowler Avenue are narrow and cross several commercial strips and big box shopping centers. Sidewalk coverage beyond this, leading up to Fowler from the neighborhoods is very limited. Also crossings are limited to the signals. Bike lanes are located on each side of the roadway with intermittent protected areas. No designated facilities lead to Fowler from the surrounding neighborhoods.

Along Bruce B. Downs, three-lane traffic continues towards the University of South Florida campus. Sidewalks are located on each side of the roadway until the USF entrance at USF Pine Rd. where the sidewalk is discontinued on the east side of the roadway. The sidewalk on the west is narrow and there are limited crossings for reaching the campus on the east side of the roadway other than a pedestrian bridge before Fletcher Avenue. Unprotected

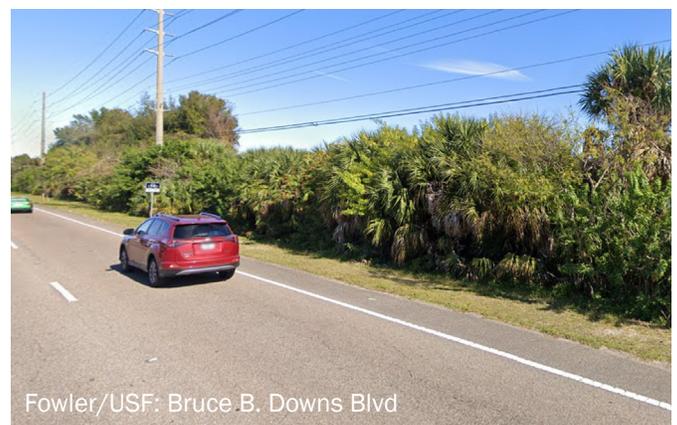
bike lanes are located on each side of the roadway. The USF campus has various bicycle facilities that connect to the roadway. Additionally there are bike lanes on Fletcher Avenue and also on 131st Avenue and a parallel north/south facility on 22nd Street



Seminole Heights: Florida Avenue before Sligh Avenue

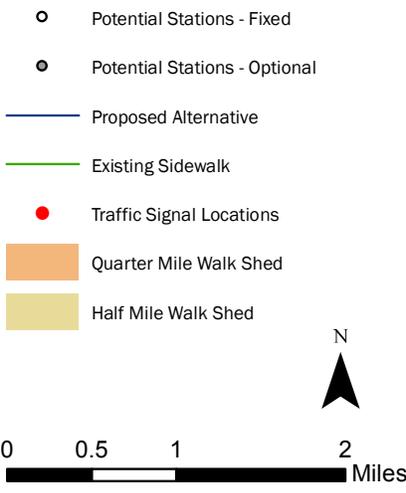
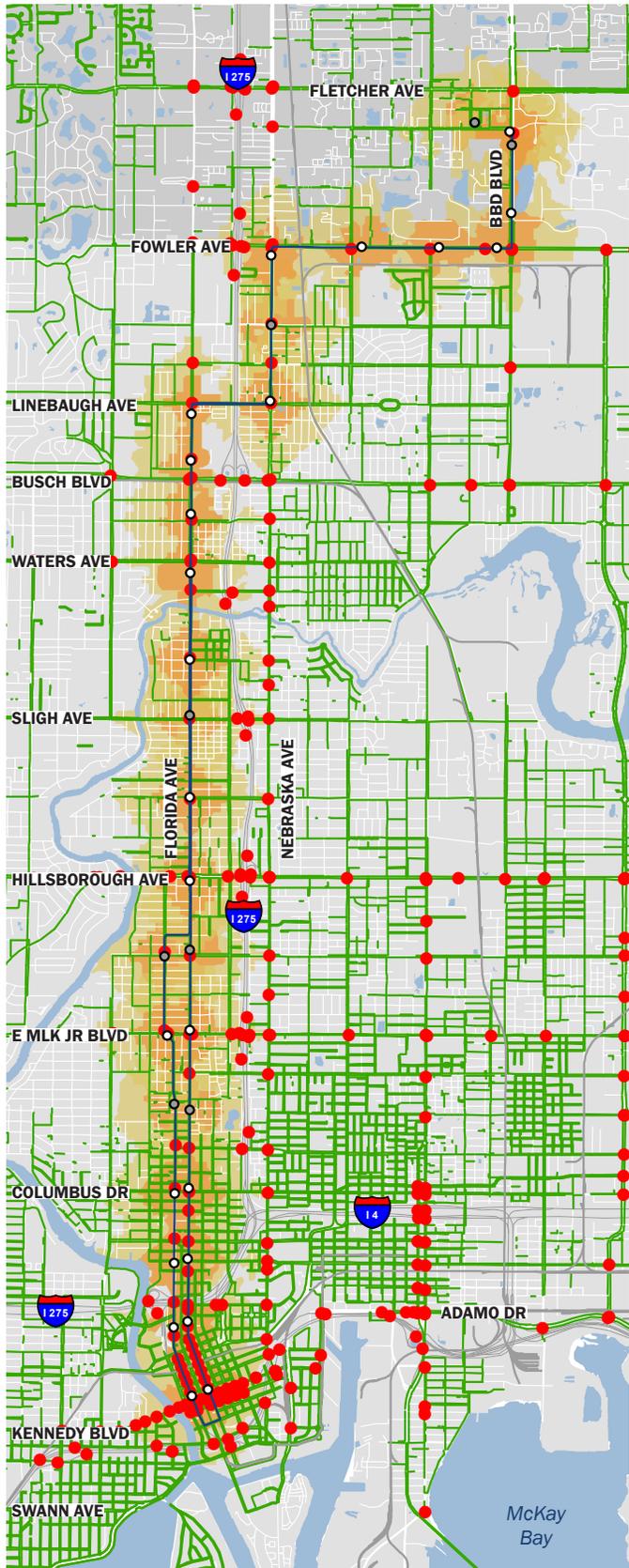


North Florida/Nebraska: Linebaugh Avenue



Fowler/USF: Bruce B. Downs Blvd

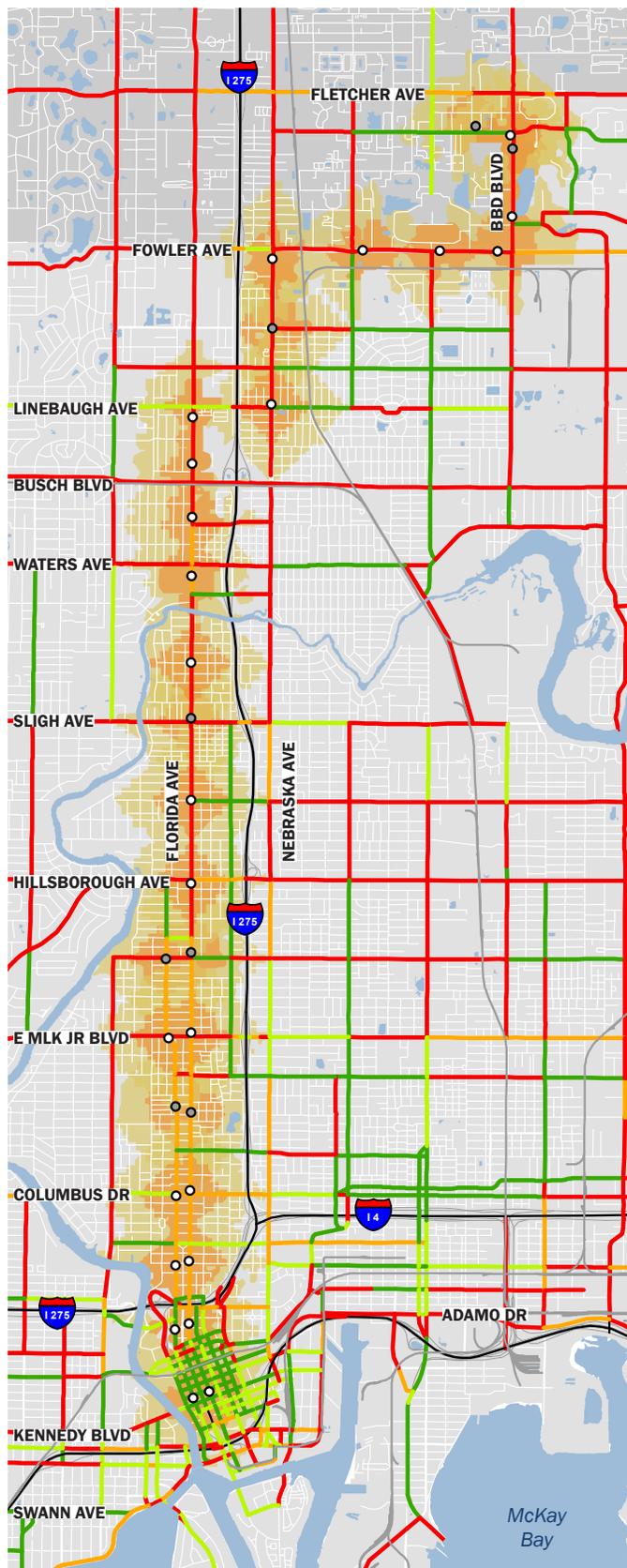
Map 14. Existing Sidewalks with Walk Sheds and Traffic Signal Locations



Source: City of Tampa, Hillsborough County, FDOT, HDR



Map 15. Pedestrian Level of Traffic Stress



- Potential Stations - Fixed
- Potential Stations - Optional

Pedestrian LTS

— Limited Access

— 1

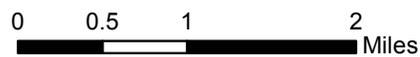
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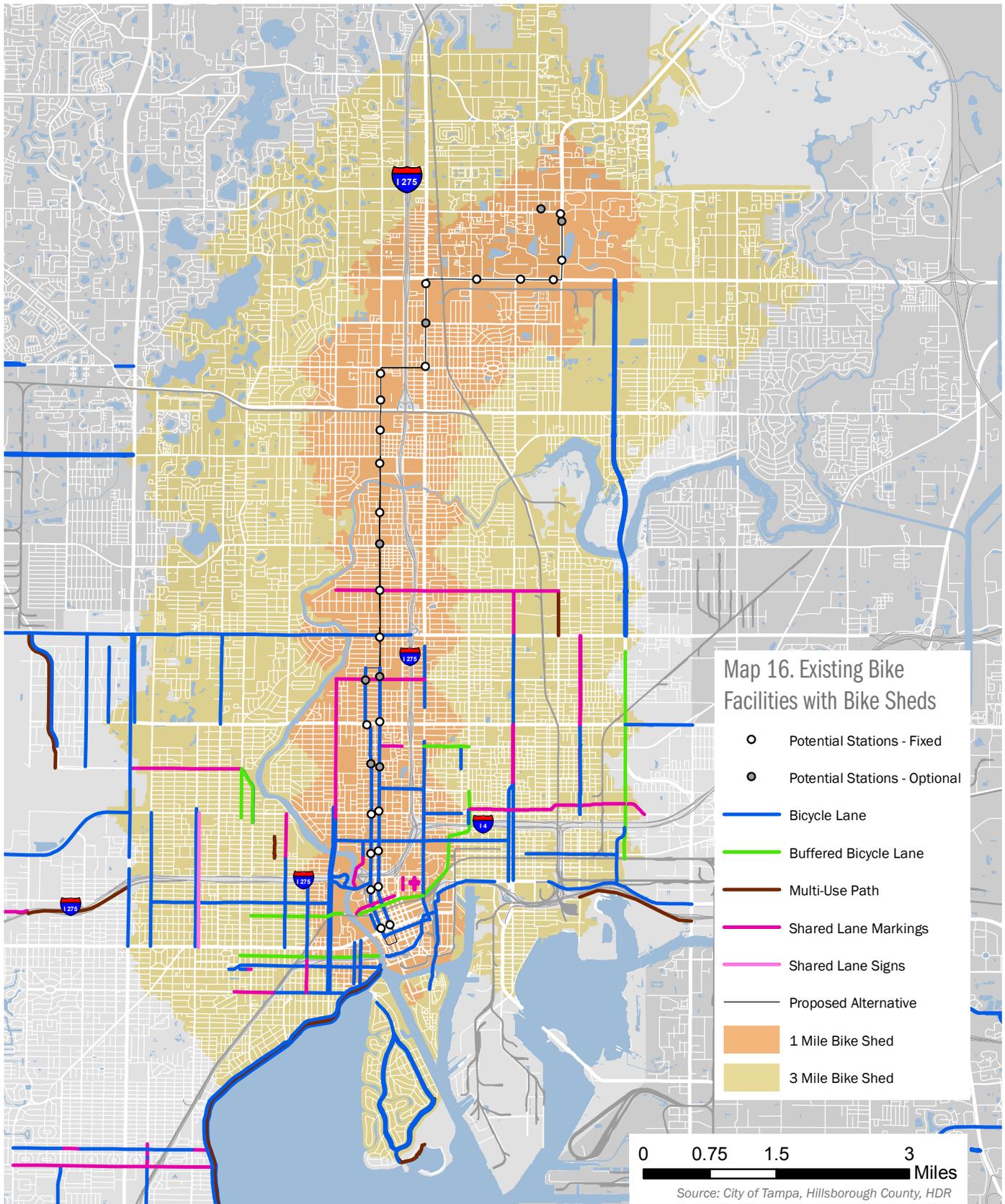
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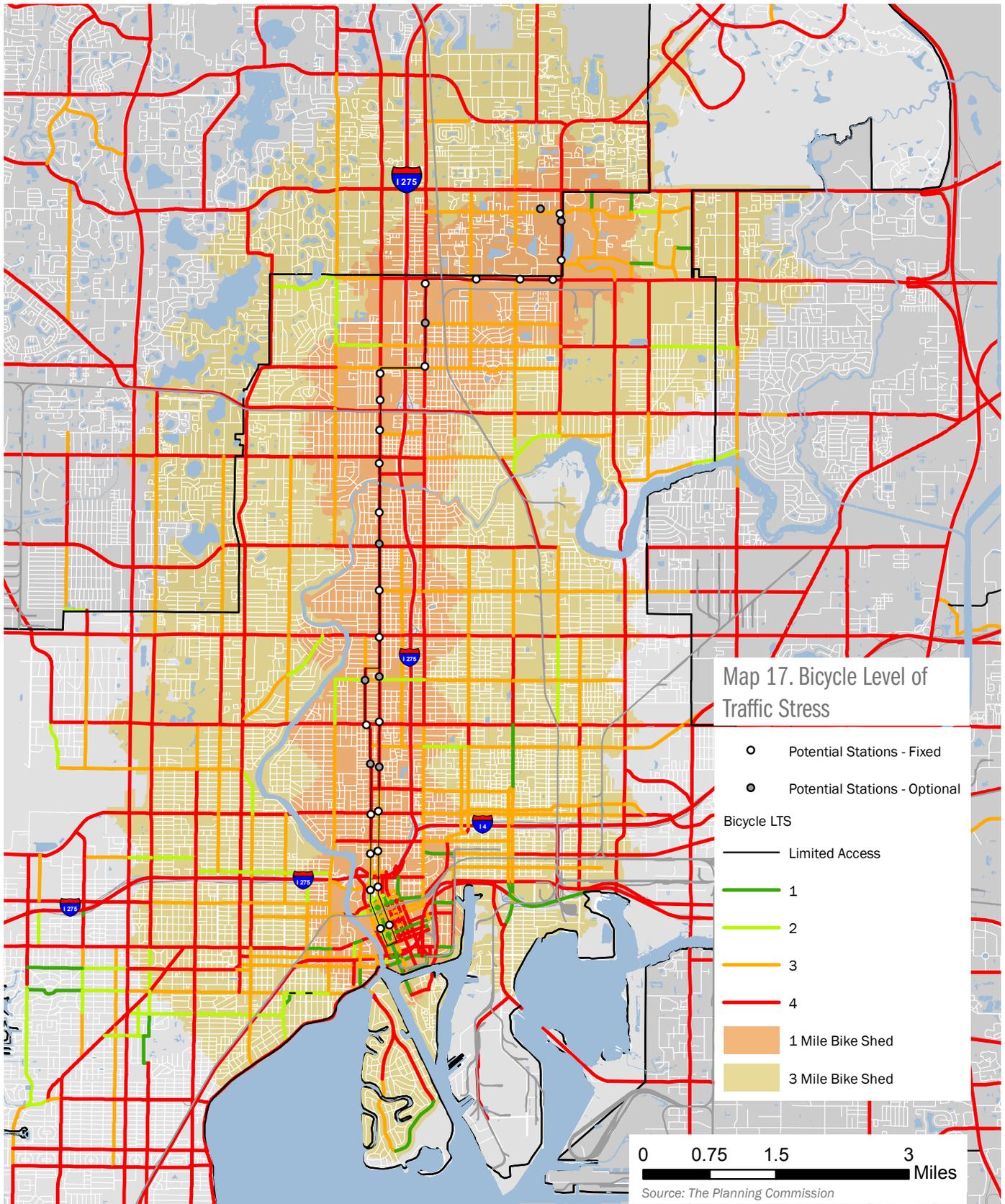
■ Quarter Mile Walk Shed

■ Half Mile Walk Shed



Source: The Planning Commission





CORRIDOR SAFETY ANALYSIS

As shown in **Map 18** and **Tables 3** and **4**, bicycle and pedestrian crashes exist throughout the corridor with increased concentrations in the Downtown, Tampa Heights, North Florida/Nebraska, and Fowler/USF subareas. It is interesting to note that the Downtown area has almost full sidewalk coverage and many east/west and north/south bicycle facilities compared to the north where these amenities are limited.

In the Downtown subarea, crashes appear to be concentrated along Florida Avenue and Tampa Street, as well as Kennedy Blvd and Jackson Street Florida Avenue has more concentration of pedestrian crashes and Tampa Street has more bicycle crashes. This pattern continues along Florida Avenue and Tampa Street into Tampa Heights north until MLK Jr. Blvd where bike/pedestrian crashes concentrate by the I-275 ramps.

Within the Seminole Heights subarea, crashes decrease (compared with the other subareas) until Hillsborough Avenue where they are concentrated at the intersection. Crashes increase again at Sligh Avenue both at Florida Avenue and also Nebraska Avenue and steadily increase on both roadways heading north. Significant bike and pedestrian crashes occur at the Waters Avenue intersection and the Busch Blvd intersection, as well as along the roadway segment in between.

As the route heads into the Fowler/USF subarea, bicycle and pedestrian crashes intensify significantly. This area is a commercial corridor with limited bicycle and pedestrian infrastructure as discussed previously. Crashes occur throughout Fowler Avenue heading west to Bruce B. Downs and continues north along the route.

As part of Hillsborough MPO’s Vision Zero, the top 20 high crash corridor segments were identified for all modes, vulnerable users, aggressive driving, and lighting conditions. Several of these segments are located either within or intersecting with the proposed BRT alignment. The specific conditions of these segments are described further in the Policy and Regulatory Tools section of this report.

Table 3. Study Area Intersections with the Most Pedestrian Crashes

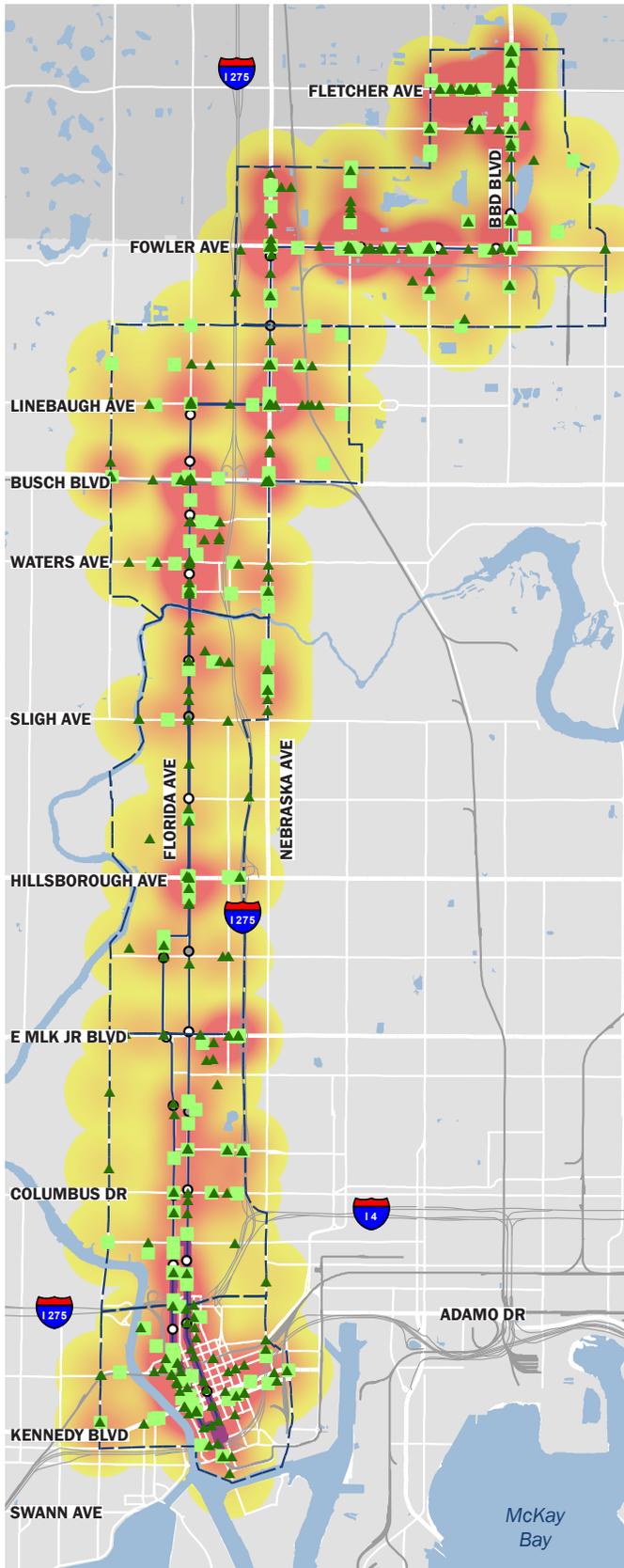
INTERSECTION	PEDESTRIAN CRASHES
Kennedy Blvd @ North Blvd	2
Busch Blvd @ Nebraska Avenue	2
15th St @ Fowler Avenue	2
Fowler Ave @ Nebraska Avenue	2

Source: CDMS

Table 4. Study Area Intersections with the Most Bicycle Crashes

INTERSECTION	BICYCLE CRASHES
15th St @ Fowler Avenue	6
124th Ave @ Nebraska Avenue	5
Bird St @ Florida Avenue	5
22nd St @ Fowler Avenue	4
Cr 582a @ Livingston Avenue	4
Fowler Ave @ Nebraska Avenue	4
22nd St @ 131st Avenue	3
Cr 581 @ 138th Avenue	3

Source: CDMS



FROM 2015 TO 2019



194

Total Bike Crashes
in Study Area



324

Total Pedestrian Crashes in
Study Area

17%

of Bike/Ped Crashes
Occurred in Downtown

13%

of Bike/Ped Crashes
Occurred Along Fowler Ave

Map 18. Pedestrian/Bike Crash Type & Density

-  HART TOD Study Area
-  Potential Stations - Fixed
-  Potential Stations - Optional
-  Proposed Alternative
-  Streetcar Proposed Extension
- Crash Type (2015-2019)
 -  Pedestrian
 -  Bike
- Pedestrian/Bike Crash Density
 -  High
 -  Low

0 0.5 1 2 Miles

Source: CDMS





MARKET ASSESSMENT

LOVE
YOUR
NEIGH

6. MARKET ASSESSMENT

Transit investment such as BRT can have catalytic impacts on real estate markets– impacting the pace, location, and scale and form of new development. The transformational impact of BRT can be measured through three primary metrics: the pace of development, the share of regional development that occurs within a half mile of a BRT line, and the density – or floor-area-ratio (FAR) – of development. However, BRT investment alone does not necessarily spur transit-supportive development –baseline real estate market conditions play a key role when projecting future development potential.

6.1. OVERVIEW

SB Friedman assessed the market potential for residential, office, and retail development within the five subareas that make up the study area. Based on our research and analyses, each of the subareas of the study area was categorized into one of three market typologies: weaker, emerging; and stronger markets. These market strength typologies were defined based on the near-term potential to attract private investment in transit-oriented development. This assessment considered the study area’s position in the larger region, key informant interviews, and key market indicators. Performance metrics reviewed include rent and pricing trends, spatial distribution of recent investment, occupancy, and TOD-supportiveness. Relative market strength for each subarea was assessed by land use and synthesized into an overall market strength typology designation for each subarea.

When planning for transit investment, it is important to consider how all residents could benefit from increased housing choices, employment opportunities, community amenities, and local services driven by improved transit access. The study area is a densely populated area of the County and is home to nearly 53,000 residents. The study area is located at the core of a growing region and County. Hillsborough County is forecasted to add both population and employment over the next twenty years, which will impact demand for new real estate development in the County as a whole and within the study area.

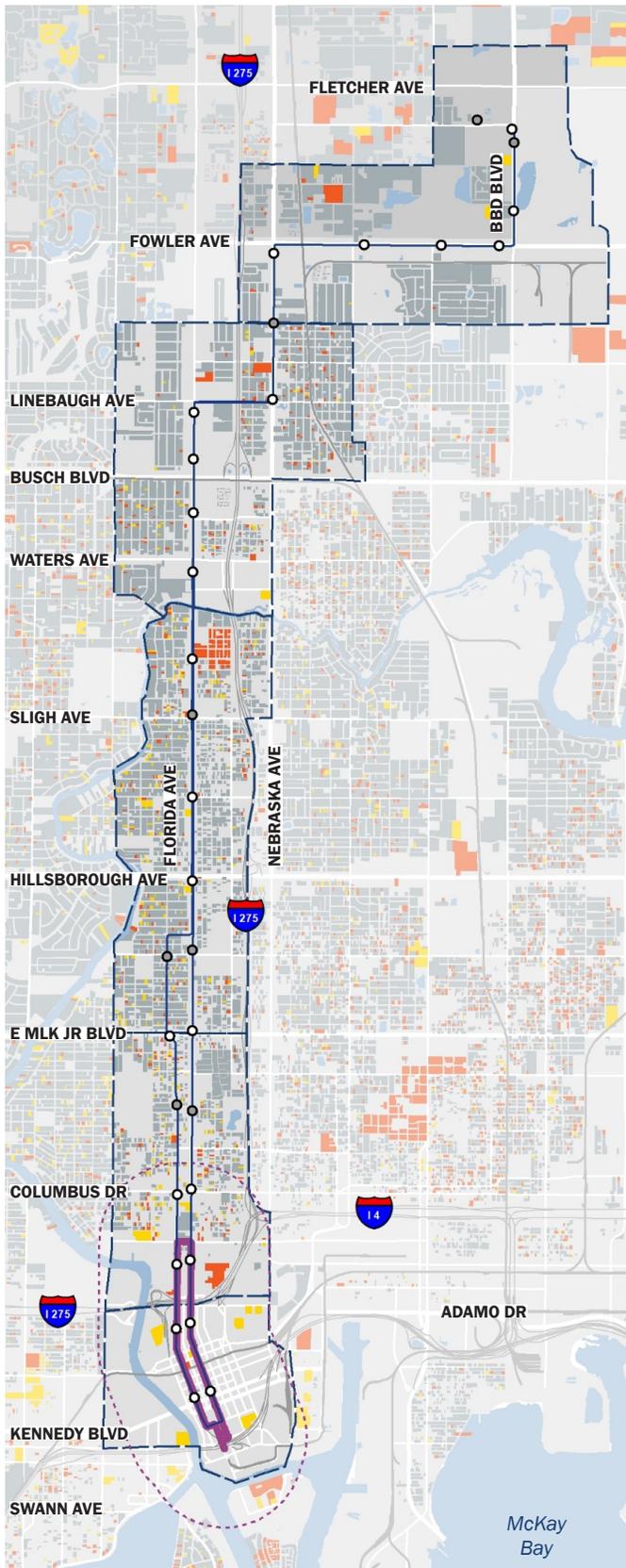
Overall, the study area is more diverse and less affluent than Hillsborough County. Overall, 34% study area population is Black, which is twice the percentage in the County (17%). However, race is not evenly distributed across the study area. There are a higher percentage of black residents in the Tampa Heights and Fowler/USF subareas as compared to the Downtown and Seminole Heights subareas. In terms of median household income (MHI), Hillsborough County has a MHI of \$69,200, which is over twice the MHI in the study area of \$31,400. Similarly, income is not evenly distributed across the study area.

The Tampa Heights and Fowler/USF subareas have the lowest incomes within the study area, with MHI of less than 30% of the area median income (AMI) while the Seminole Heights and Downtown subareas have the highest incomes in the study area.

6.2. RESIDENTIAL MARKET ASSESSMENT

There are approximately 21,600 residential units in the study area – 43% are multifamily and 57% of households are renters, a higher percentage than the County as a whole. Within the study area, the product mix and home ownership levels vary. The Downtown subarea has relatively few residential units compared to the other subareas, but nearly all units are multifamily; the Downtown subarea also has the highest renter-occupancy rate. The Seminole Heights subarea has the least multifamily and most single-family housing units, as well as higher homeownership rates compared to the other subareas and the County; this subarea also has the highest median household incomes, which support higher ownership rates. The Fowler/USF subarea has the largest share of overall units and multifamily units. This subarea also has a very low home ownership rate.

The study area is mostly built out, with nearly 40% of residential parcels developed before 1950 and nearly 90% of the parcels developed before 2000 (**Map 19**). Recent development in the study area has consisted of infill and teardowns/rebuilds. Several of the larger tracts that have been redeveloped were former Tampa Housing Authority (THA) sites. Pre-recession development was concentrated in the Downtown and Seminole Heights subareas. Since the recession, development has occurred in the Seminole Heights and Tampa Heights subareas. There has been very limited residential development since 2000 in the Fowler/USF subarea other than purpose-built student housing (PSSH). Overall annual permitting activity in Hillsborough County has not yet returned to pre-recession levels and will likely be further impacted by the COVID-19 pandemic.



Map 19. Residential Parcels by Year Built

- Built 1999 or Earlier
- Built 2000 to 2009
- Built 2010 to 2019



0 0.5 1 2 Miles

Source: Esri, HDR, Hillsborough County, SB Friedman

MULTIFAMILY

There are approximately 9,500 apartments in the study area, which accounts for approximately 7% of all existing apartments in the County. Recent and pipeline multifamily development in the County has primarily clustered in Downtown Tampa, South Tampa, Westshore, and Brandon. Within Downtown Tampa, development has been primarily clustered in the Channel District, Historic Ybor, Tampa Heights and West River neighborhoods. Since 2010, the study area has captured approximately 14% of the recent units delivered. However, in the future, the study area is anticipated to capture nearly one-third of pipeline units that are proposed and under construction, indicating the growing attractiveness of portions of the study area.

New Multifamily Deliveries

Most of the recent and pipeline apartment development in the study area has occurred in the Downtown subarea. In total, nearly 2,500 units were delivered in the Downtown subarea since 2010 and another 3,000 units are under construction or proposed (Figure 20, Map 21). This new development has primarily been in the form of high-rise typologies, which are the most TOD-supportive with the highest densities and structured parking. Outside of the Downtown subarea, recent development has occurred only in the Tampa Heights and Seminole Heights subareas; this new development has typically been mid-rise in scale. There is currently only one pipeline apartment project

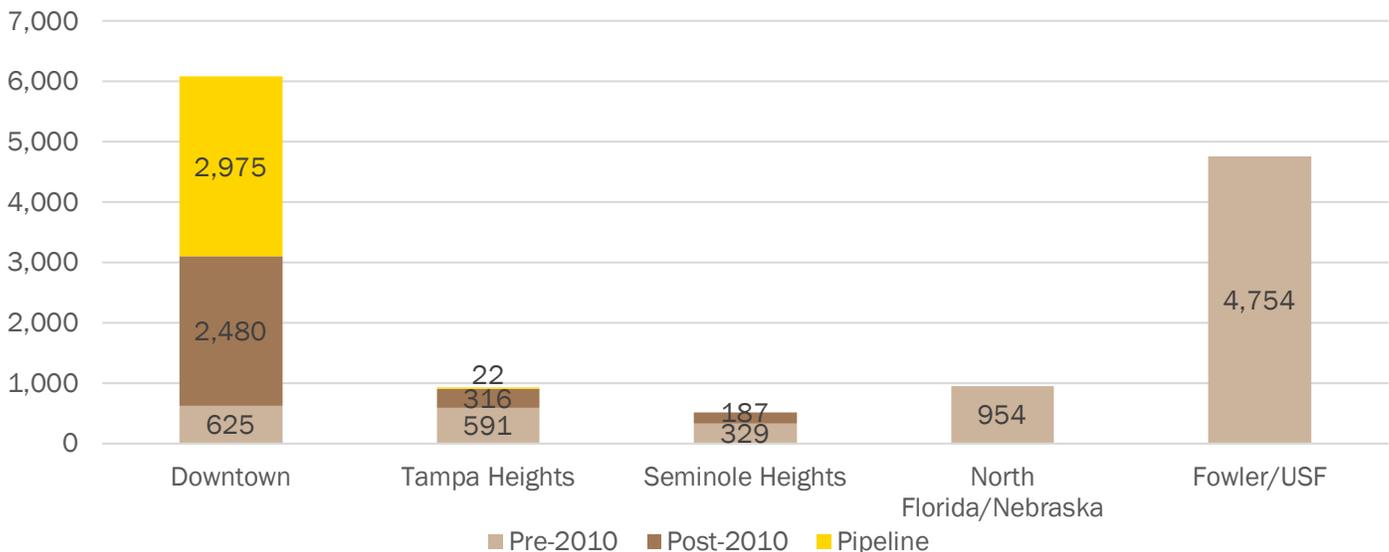
located outside of the Downtown subarea, an adaptive reuse project in the Tampa Heights subarea. There has also been growing interest in multifamily development along Nebraska Avenue in areas located just outside the study area.

There has been no traditional multifamily development in the North Florida/Nebraska or Fowler/USF subareas in the last ten years. Many of the parcels that have recently been developed around USF are PBSH, which is not fully captured in the multifamily data sources/analysis. There may be interest in further development of PBSH in the Fowler/USF subarea; for example, an 800-bed PBSH project has been proposed as part of the University Mall redevelopment in the Uptown District. Also, according to a review of County assessor data, some older multifamily projects have been purchased by non-local entities in recent years. There may similarly be interest in redevelopment of these sites if market conditions improve.

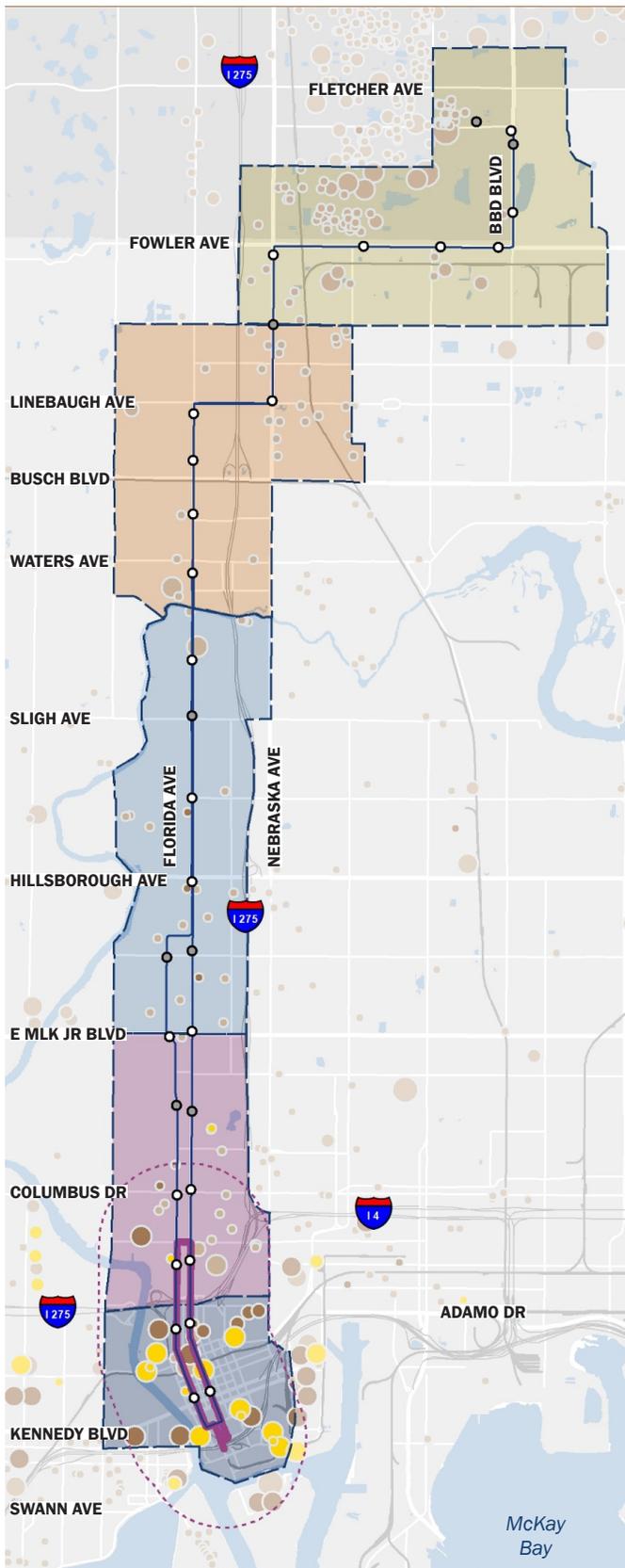
Subarea Multifamily Performance

Rent and vacancy levels are two key market performance indicators. Overall rents are highest in the Downtown subarea while the highest rent premiums for new construction are in the Tampa Heights and Seminole Heights subareas (Figures 22 and 23). Rents are an important indicator of the market's ability to deliver TOD-supportive units because higher rents are required to support higher density typologies. Typically, rents of approximately \$2.00 per square foot are required

Figure 20. Existing and Pipeline Multifamily Inventory by Subarea (Units)



Source: CoStar, SB Friedman



Map 21. Existing & Pipeline Multifamily by Subarea

Number of Units

- More than 500
- 200 to 500
- 100 to 200
- Less than 100

- Built Before 2010
- Built 2010 and After
- Proposed or Under Construction



Source: CoStar, Esri, SB Friedman

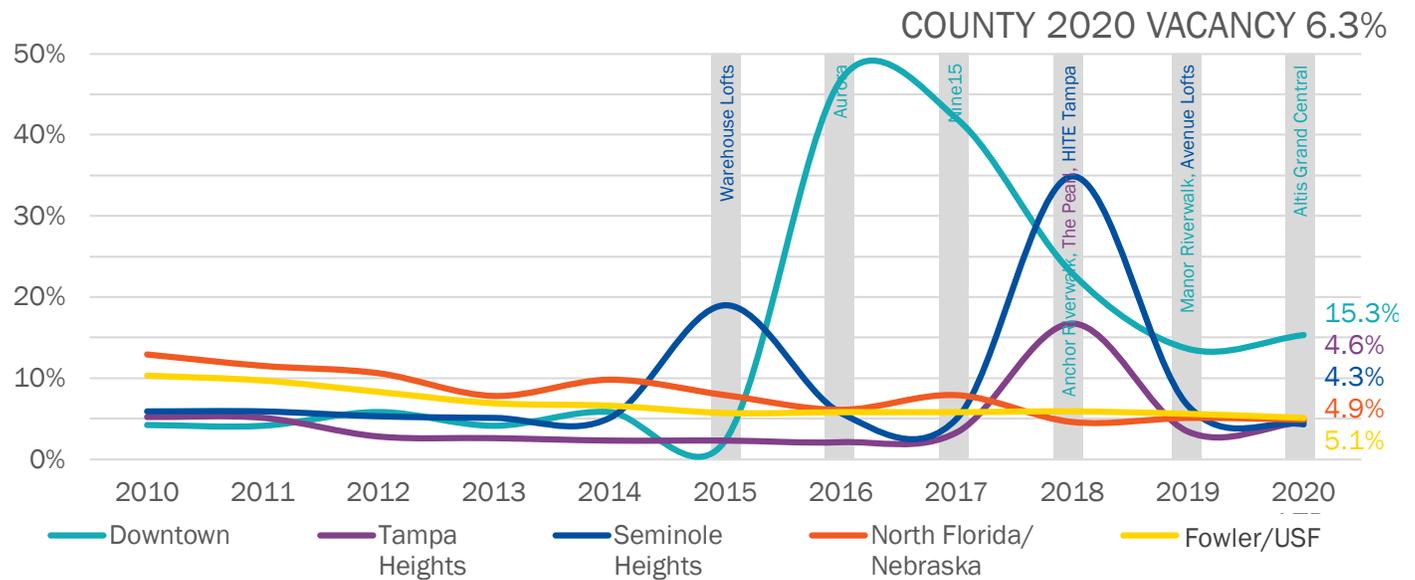
HART TOD Pilot Project

Figure 22. 2020 Median Multifamily Rents per Square Foot by Subarea



Source: CoStar, SB Friedman
[1] Due to limited project specific data, pre-2010 rent reflects overall rent for all product in the subarea

Figure 23. Multifamily Vacancy by Subarea



Source: CoStar, SB Friedman



to support new construction with structured parking, therefore, achieving this rent level is a strong indicator of the market's ability to provide highly TOD-supportive residential form. Even without new product, rents in the North Florida/Nebraska and Fowler/USF subareas have been increasing at compound annual growth rates (CAGR) of 3% and 4%, respectively. However, rents in these subareas remain relatively low and do not meet the \$2.00 per square foot rent threshold needed to support new construction of TOD-supportive formats with structured parking.

In those subareas that have seen recent development, there have been initial periods of higher vacancy as new product has come online and then subsequently absorbed. Current vacancy remains higher in the Downtown subarea for this reason, while recent deliveries in the Tampa Heights and the Seminole Heights subareas appear to have been fully absorbed. COVID-19 is anticipated to impact the multifamily market, particularly lower-rent units. Declines in rents or increases in vacancies are not yet reflected in available data as there have been national and statewide eviction bans in place. However, as these bans are lifted, there could be a decline in performance in the near term as hard struck residents are unable to make rent payments.

FOR-SALE RESIDENTIAL

Data from Multiple Listing Services (MLS) on for-sale closings between 2016 and 2019 was analyzed to assess the spatial distribution and pricing trends of recently closed single-family detached and single-family attached units, which includes townhomes, duplexes and condominiums. Between 2016 and 2019 (partial year), there were over 2,000 home closings in the study area (**Map 26**). There was limited variation in terms of the number of annual closings in each year (excluding 2019), with an average of approximately 700 transactions per year. While there has not been an uptick in the number of closings, overall sale prices in the study area have increased significantly during this period. Closing prices for single-family attached product within the study area grew at a CAGR of 11.4% and single-family detached closing prices grew at 9.8%, indicating market strength.

Single-Family Detached

Single-family detached closings were primarily located in the Tampa Heights, Seminole Heights, and North Florida/Nebraska subareas. Resales of newer construction product built since 2010 in the study area were limited between 2016 and 2019, accounting for only approximately 7% of transactions. Median closing prices for older product and new construction product, built since 2010, were highest in the Seminole Heights and Tampa Heights subareas. However, median sales prices have grown the fastest in the Tampa Heights and North Florida/Nebraska subareas, which have CAGRs of 19% and 17%, respectively; this indicates the price for older product in these subareas is growing as well (**Figure 24**).

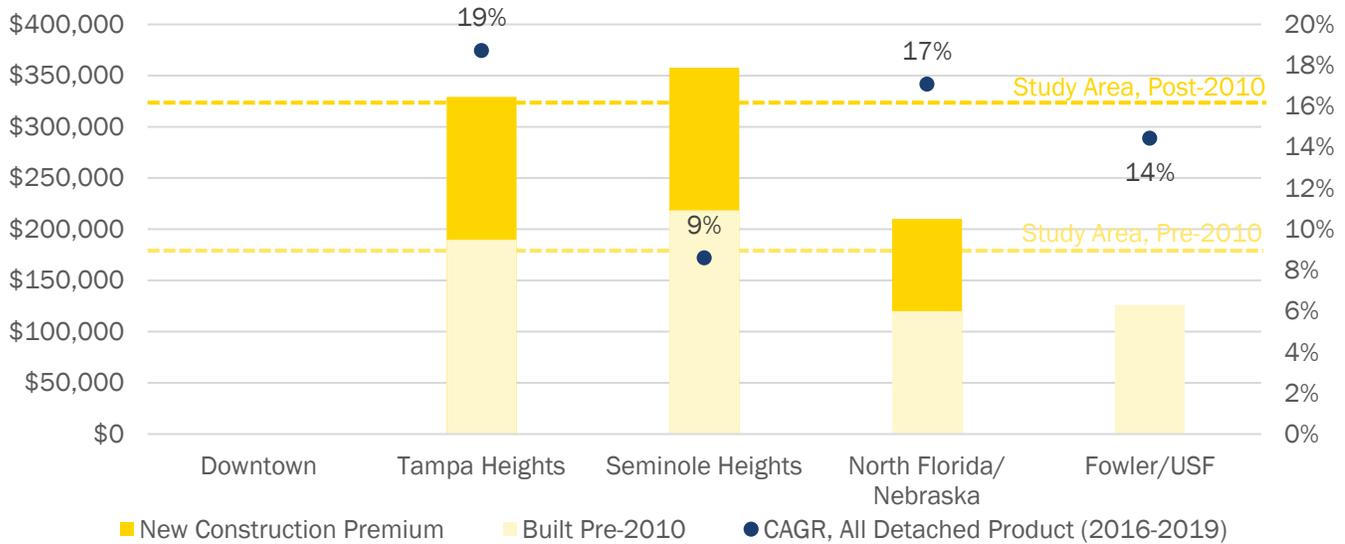
Single-Family Attached

There were significantly fewer single-family attached closings than detached. Most of the single-family attached transactions that have occurred from 2016-2019 were for condominiums in the Downtown subarea with limited transactions in the other subareas. The only new construction single-family attached product in the study area built between 2016 and 2019 (partial year) was built in the Seminole Heights subarea. These units, built in 2016 and 2017, command a 265% premium over single-family attached product built before 2010. Other than these newer units in the Seminole Heights subarea, the Downtown subarea appears to be commanding the highest closing prices, with per unit prices approaching \$300,000. Since 2019, luxury townhomes have been developed in the southwest portion of Tampa Heights near North Boulevard and/or Columbus Drive. These townhomes have commanded sales prices as high as \$600,000. (**Figure 25**).



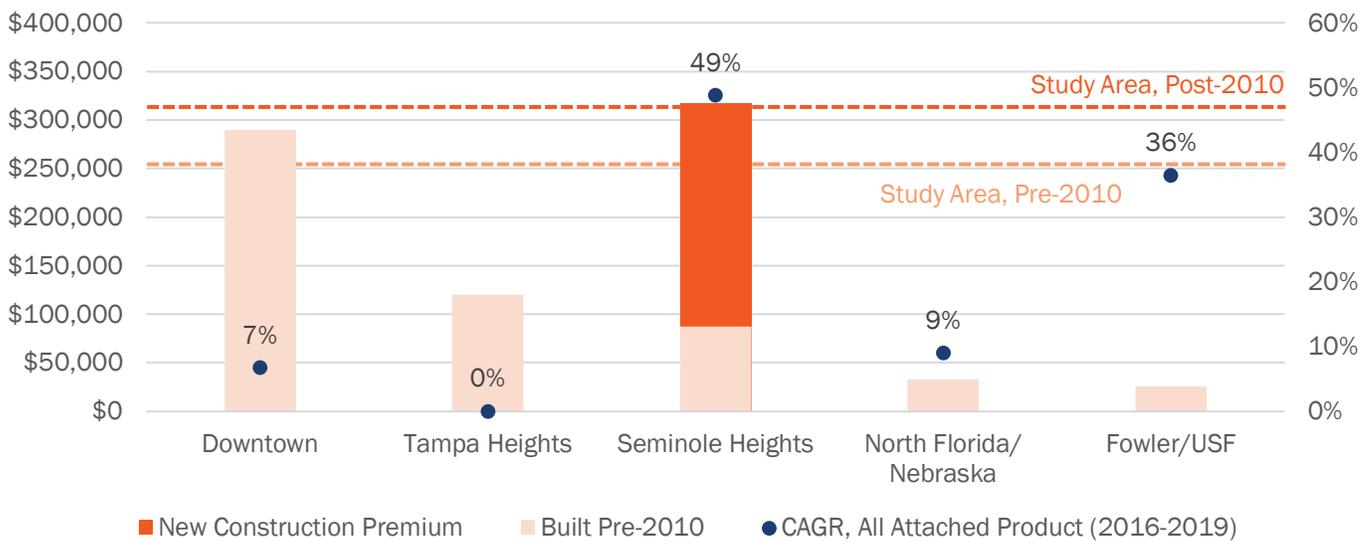
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Figure 24. Single-Family Detached Median Closing Prices by Subarea (2016-2019[1])

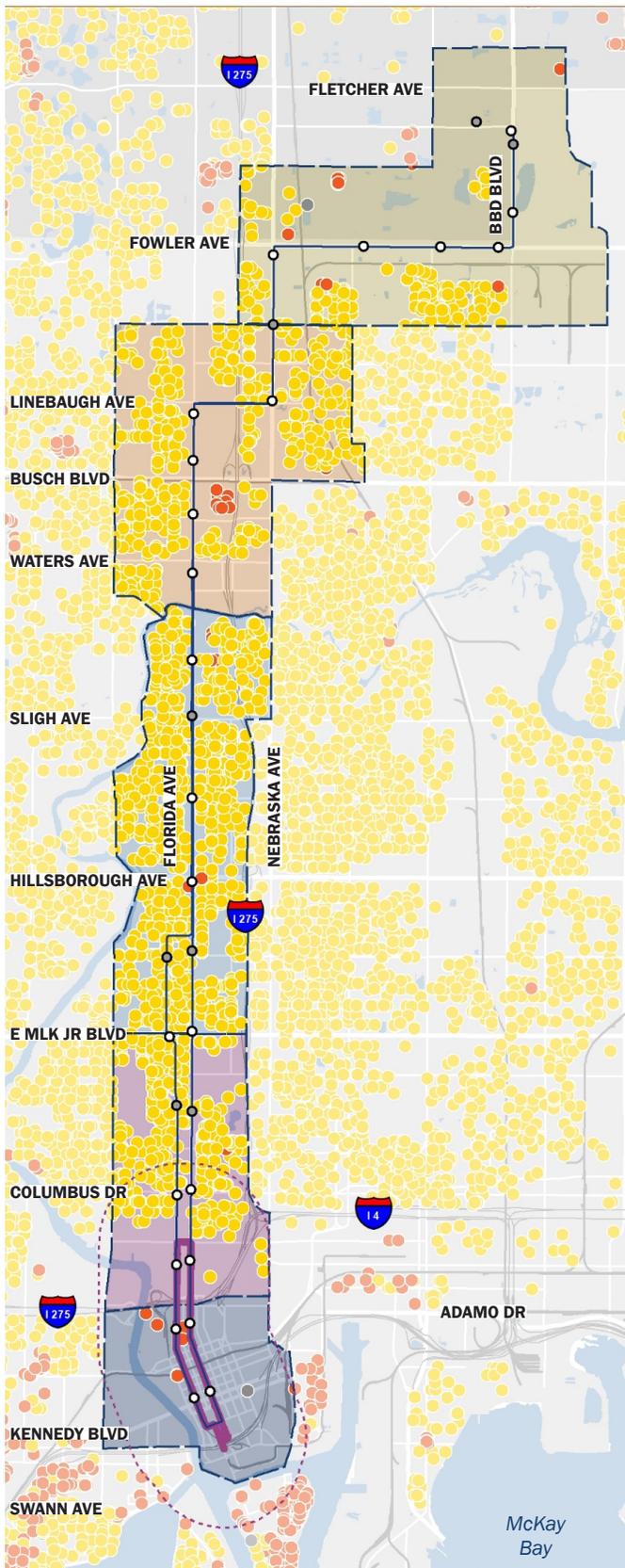


Source: MLS, SB Friedman
 [1] Partial year data available for 2019

Figure 25. Single-Family Attached Median Closing Prices by Subarea (2016-2019[1])



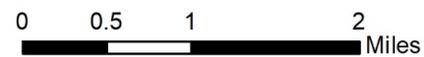
Source: MLS, SB Friedman
 [1] Partial year data available for 2019



Map 26. Recent Home Sales (2016-2019[1])

Recent Home Sales (2016 - 2019 [1])

- SF Detached
- SF Attached
- Other



Source: Esri, MLS, SB Friedman
[1] Partial year data available for 2019

HOUSING AFFORDABILITY

Hillsborough County is growing and several areas within the study area are attracting newcomers. Recent development trends and performance metrics demonstrate market potential for continued residential development in the study area. As this potential is realized, it will be important to consider policies and actions to ensure housing options are available for households at lower income levels. In later phases of the HART TOD Pilot Project, recommendations and strategies will be presented to minimize displacement caused by rapid gentrification.

The federal Department of Housing and Urban Development (HUD) defines an “affordable dwelling” as one that a household can afford when spending 30% or less of its income; or conversely, a household that spends more than 30% of its income on housing is deemed ‘cost burdened.’ In Hillsborough County, nearly two-thirds of households with incomes at or below 60% of the Area Median Income (60% AMI) are cost burdened. Moreover, 76% of owner-occupied households and 89% of renter-occupied households at or below 30% AMI are cost-burdened. Cost burdens appear to be driven, in part, by an imbalance wherein higher-income households (households at or above 120% AMI) are living below their means, in housing units that would otherwise be affordable to lower-income households.

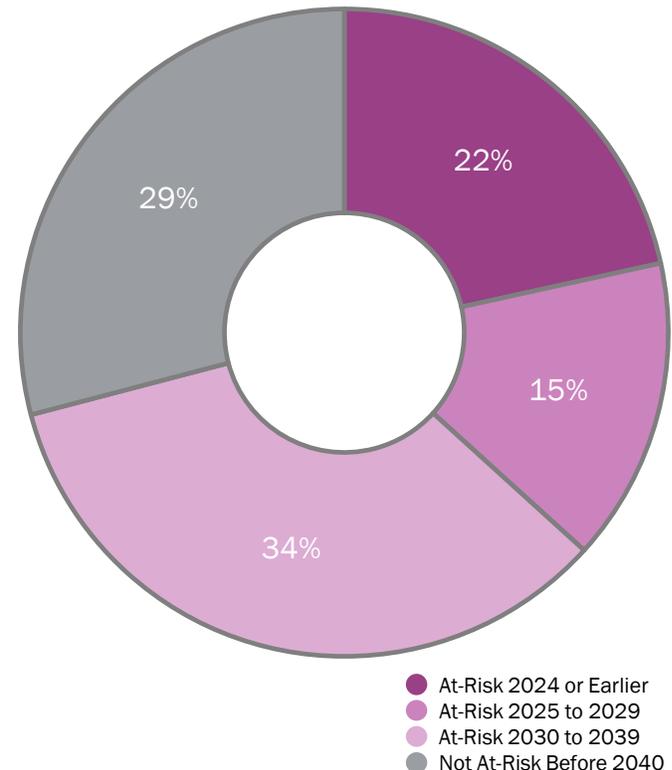
The observed levels of cost-burden in the study area and the potential mismatch between housing demand and supply for lower-income households demonstrates the level of risk for displacement, particularly for households earning less than 60% AMI. In the future, the presence of the proposed BRT could increase demand for housing in the study area and further exacerbate displacement. The supply of housing affordable to these households is typically defined as either legally restricted affordable housing (LRAH) or naturally occurring affordable housing (NOAH):

- LRAH is housing that is contractually obligated to serve lower-income households and populations. These units are owned, operated, and subsidized by various groups including federal, state, and local governments and/or, nonprofits, etc. Different LRAH funding programs target different income categories, but typically target housing for households earning less than 60% AMI.
- NOAH are privately-owned housing units with rents that are affordable to lower-income households and populations earning less than 60% AMI. Without contractual obligations to maintain affordability, as market conditions improve, landlords can choose to

increase rents on NOAH units. Rent could increase to levels which may be unaffordable to current residents which in turn leads to displacement.

Overall, there are 64,040 affordable rental units in the County affordable to households earning 60% AMI or less. This represents 29% of rental units. Of these rental units, there are approximately 22,000 LRAH units and 42,000 NOAH units in the County. Within the study area, there are approximately 7,150 units affordable to households earning 60% AMI, or approximately 56% of the total units; of these units, 31% are LRAH and 25% are NOAH. Despite the longer-term affordability of LRAH compared to NOAH, the contractual obligations associated with these units can eventually expire and place residents of these units at risk of displacement. Over 20% of the LRAH units in the study area are at risk of expiring in the next 5 years and an additional 15% are at risk of expiring between 2025 and 2029. Combined, over 70% of the LRAH units in the study area are at risk of expiring in the next 20 years. If these units are held by a non-profit with a long-term mission of providing housing, they will likely seek new tax credits, rehab the units and maintain the affordability level. However, if the units are owned by a for-profit entity,

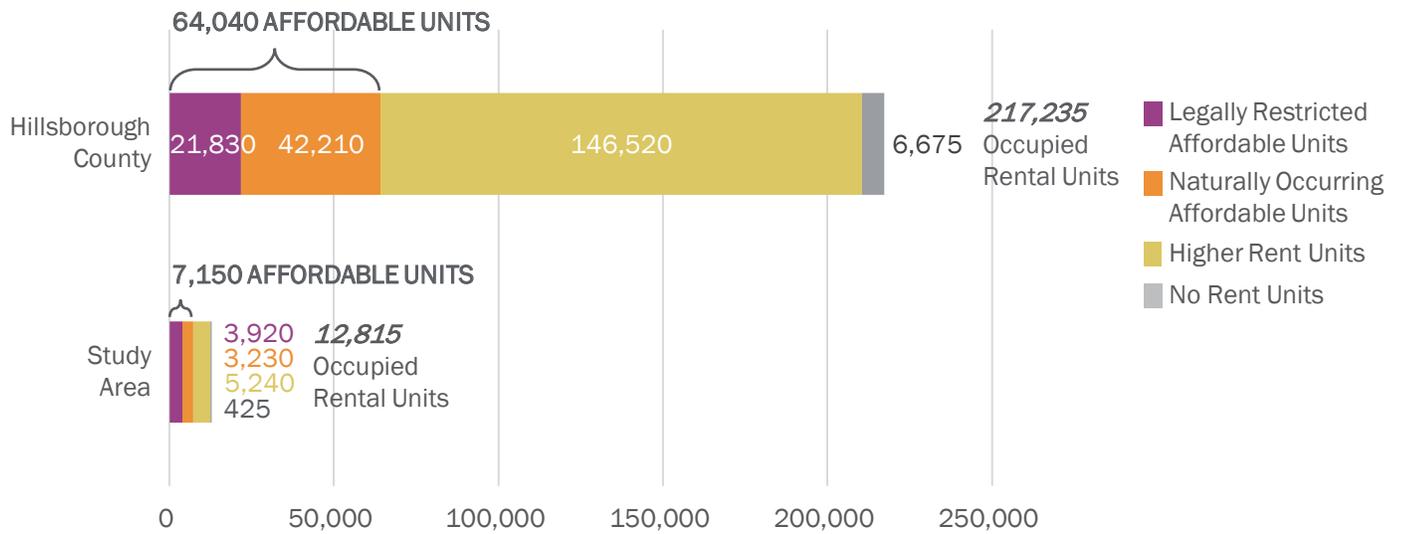
Figure 27. Study Area Legally Restricted Risk of Expiration



Source: National Housing Preservation Database (NHPD), SB Friedman

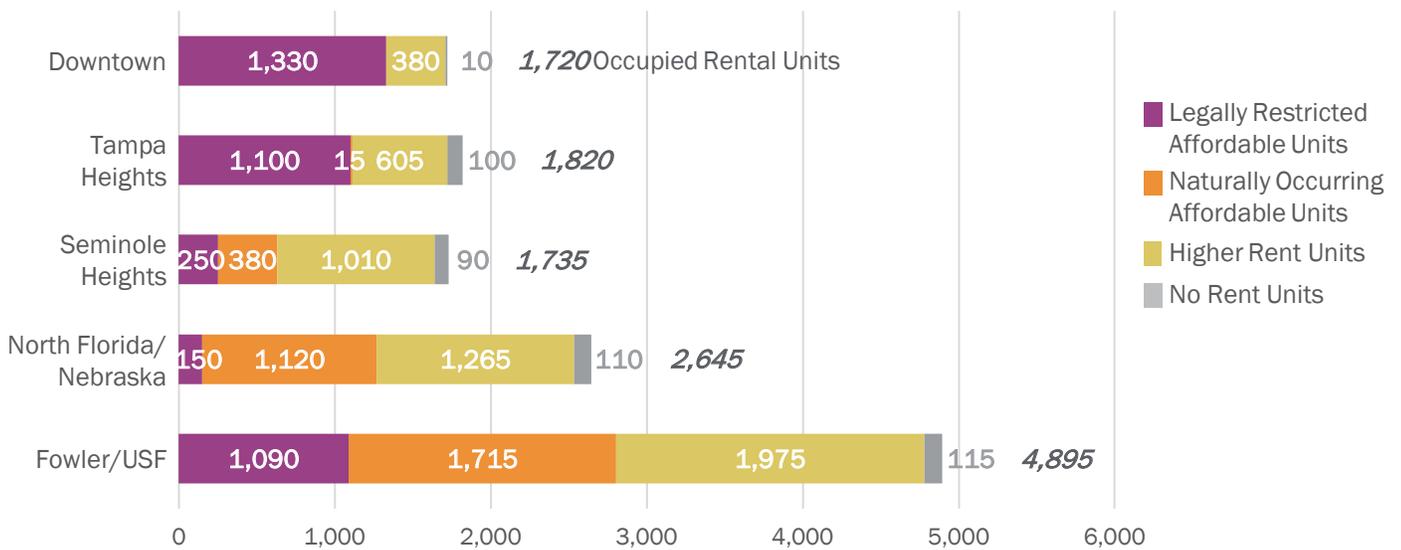


Figure 28. Rental Inventory by Affordability Level (Units)



Source: ACS, National Housing Preservation Database (NHPD), SB Friedman, State of Florida

Figure 29. Rental Inventory by Affordability Level by Subarea (Units)



Source: ACS, National Housing Preservation Database (NHPD), SB Friedman, State of Florida

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there is a risk that the units could flip to market rate. The sustained presence of both LRAH and NOAH units is important for maintaining long-term affordability in the study area (**Figures 28 and 29**).

The presence of NOAH in the Downtown and Tampa Heights subareas is limited. This is due to the already higher rent levels in these subareas which make apartments unaffordable to households earning 60% AMI or less. Interviews indicated that recent price increases appear to have also already been attributed to the displacement of NOAH in the Tampa Heights subarea. However, there are high numbers of legally restricted units, which means that the remaining units are at less risk of displacement due to long-term affordability obligations. However, the expiration of contractual obligations over the next 20 years could lead to further displacement without strategies to maintain long-term affordability (**Figure 27**).

The Seminole Heights subarea may experience affordability challenges in the future. Given the growth in rents and sale prices in the Seminole Heights subarea, as well as the limited supply of NOAH, there is a higher risk of displacement. There is also a limited supply of LRAH, with

only 250 units. All LRAH units in the Seminole Heights subarea are at risk of expiring in the next 20 years.

While the North Florida/Nebraska and Fowler/USF subareas have experienced high rent growth, rent levels are still comparatively low, making these affordable areas to live. However, as market conditions improve due to BRT investment and the University Mall redevelopment, there could be risk for displacement of NOAH in the long term. Additionally, while the North Florida/Nebraska subarea has a limited supply of LRAH, the Fowler/USF subarea comprises over 1,000 units. According to the National Housing Preservation Database, all the LRAH units in the North Florida/Nebraska and Fowler/USF subareas will be at risk of expiring in the next 20 years.

RESIDENTIAL MARKET POTENTIAL

Each of the subareas were categorized based on market potential to deliver TOD-supportive residential development in the future (**Table 5**). The Downtown subarea is the strongest subarea within the study area, with significant recent multifamily investment commanding higher prices. The Tampa Heights and Seminole Heights subareas are





considered emerging residential markets. Recently, new investment has shifted north into these subareas. Newer product has been fully absorbed and vacancy levels have returned to industry standards. In addition to premiums for new construction product, rents and home values are rising for nearly all residential product in these emerging subareas. Finally, the North Florida/Nebraska and Fowler/USF subareas are weaker multifamily markets, which have seen limited recent investment, lower rents and vacancy, and higher supplies of existing affordable product. New, market-rate, TOD-supportive development is unlikely without public support in these subareas. However, the proposed University Mall redevelopment could serve

as a catalyst for residential development in the Fowler/USF subarea in the future. The presence and spatial distribution of LRAH and NOAH in the study area is critical to maintaining affordability. However, as contractual obligations expire and market conditions improve, tailored strategies for the various subareas will be required to ensure long-term affordability.

Table 5. Residential Market Potential by Subarea

Subarea	Rents/ Home Values	Vacancy	New Investment	Risk of Displacement	TOD- Readiness	Market Strength
Downtown	High Rents/ Home Values	High; Recent deliveries still being absorbed	High	High; Low supply of NOAH, higher prices	Existing TOD Cluster	Stronger
Tampa Heights	High; Significant new construction premium	Average	Limited; Market still being proven	High; Low supply of NOAH, increasing prices	Potential for TOD	Emerging
Seminole Heights	High; Significant new construction premium	Average	Limited; Market still being proven	Medium; Low supply of NOAH, LRAH units at-risk to expire, strong home ownership	Potential for TOD	Emerging
North Florida/ Nebraska	Average	Average	Low	Medium; High supply of NOAH, LRAH units at-risk to expire, prices stable	Limited Market Potential for TOD	Weaker
Fowler/USF	Low	Low	Low	Limited; High supply of NOAH, LRAH units at-risk to expire, lower prices	Limited Market Potential for TOD	Weaker

6.3. OFFICE

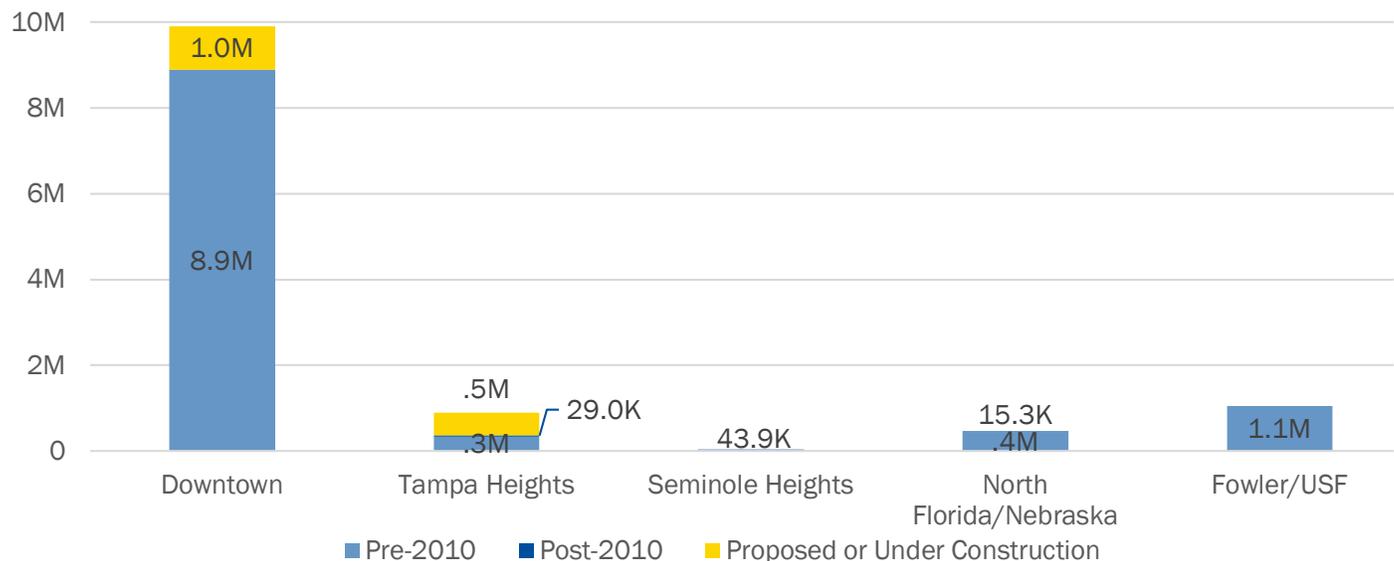
The study area is positioned at the heart of the Tampa regional office market. Downtown Tampa is second only to Westshore in terms of square feet of Class A office space. While there has been limited office development over the last decade within the study area, the study area and County are positioned for substantial new office development in the future. Over 1.5 million square feet of office space is proposed or under construction in the study area. This represents over a quarter of all pipeline office development in the County. Currently the study area includes approximately 20% of the office space in the County. Thus, the 25% share of planned square footage within the study area is indicative of the increasing appeal of the study area for office development.

NEW OFFICE DELIVERIES

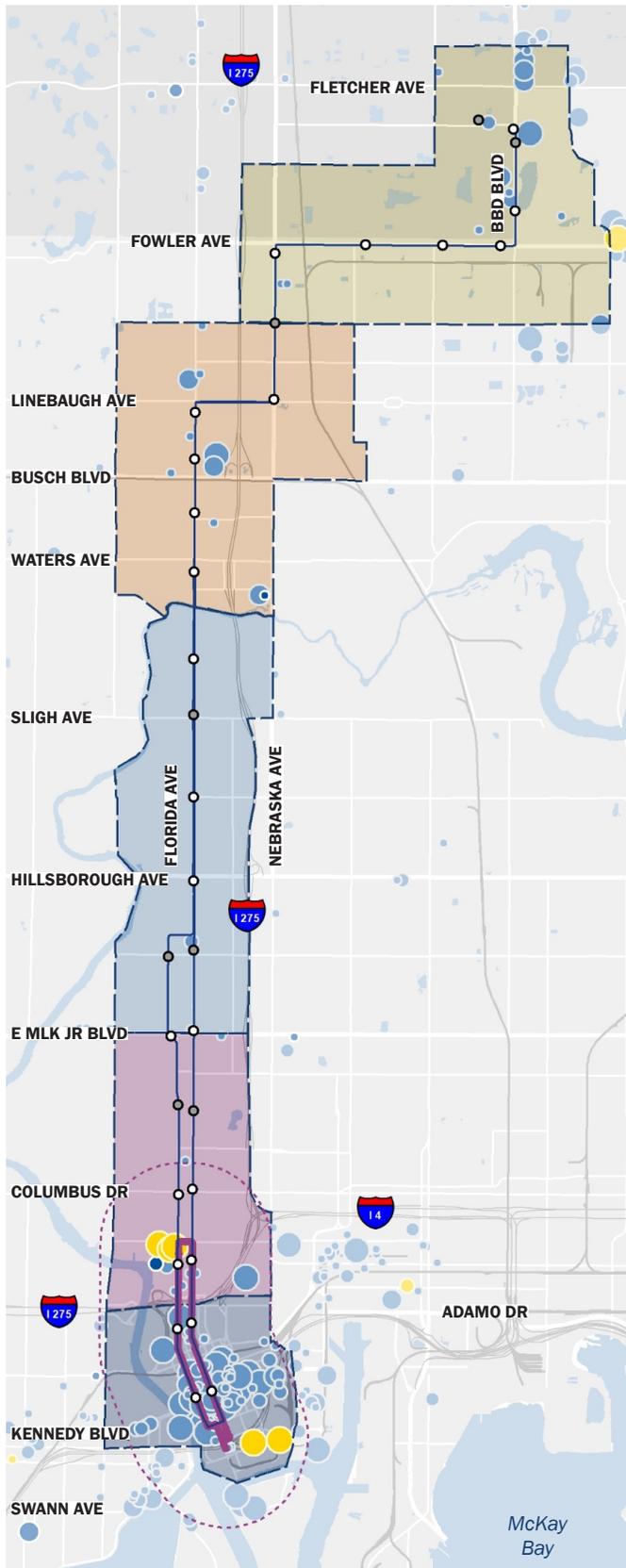
Most of the study area’s office space is located in the Downtown and Fowler/USF subareas, with few areas of concentrated office development in between (**Figure 30 and Map 31**). Class A office and corporate headquarter space is primarily located in the Downtown subarea, with over 5 million square feet of corporate office space. While the media is quick to proclaim that the “office is dead” in light of evolving remote working policies due to COVID-19, the relevance of office space is likely to remain in the long term because personal interaction is still needed to ensure

teamwork, cooperation and innovation. Once employees feel comfortable returning to the office, it is anticipated that there could be a shift back to traditional office environments. Shifting corporate employer preferences within the region indicate a shift from car-oriented, single-use business parks to walkable, vibrant and mixed-use places, which positions the Downtown subarea to continue to thrive in the future. Proposed office projects are centered in the Downtown subarea as part of the Water Street Development and as part of the Heights District in the Tampa Heights subarea. At the northern end of the study area, a cluster of medical office space is located in the Fowler/USF subarea and anchored by hospitals and other medical facilities and supported by a high number of neighboring households. The medical anchors include The James A. Haley Veterans’ Hospital, AdventHealth Tampa, Moffitt Cancer Center, Shriners Healthcare for Children, and the Morsani College of Medicine at USF. The Fowler/USF subarea is also seeing interest in office expansion through the emerging innovation district being developed around the University Mall. That project is a collaborative effort between local government, institutions, and the private sector and seeks to turn the area into a hub of activity for tech initiatives specializing in digital manufacturing and engineering. However, the private market alone has not yet been able to deliver new development and public financial support has been needed to ensure project viability.

Figure 30. Existing and Pipeline Office Inventory by Subarea (SF)



Source: CoStar, SB Friedman



Map 31. Existing & Pipeline Office Inventory

Rentable Building Area (SF)

- More than 400K
- 200K to 400K
- 100K to 200K
- Less than 100K

- Built Before 2010
- Built 2010 and After
- Proposed or Under Construction



0 0.5 1 2 Miles

Source: CoStar, Esri, SB Friedman

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SUBAREA PERFORMANCE

The Downtown subarea commands the highest average rents in the study area with the Tampa Heights and Fowler/USF subareas following (Figures 32 and 33). Class A rents are as high as \$40/square foot in the Downtown and Tampa Heights subareas and \$33/square foot in the Fowler/USF subarea. Class A price points are consistent with the overall rents in the Downtown subarea since it is predominately class A, but Class A commands much higher

than average rents in both the Tampa Heights and Fowler/USF subareas.

Vacancy rates remain relatively low across the study area with the exception of slightly higher rates in the North Florida/Nebraska subarea. The Downtown subarea vacancy rates are slightly higher than the countywide average, but higher rents and the presence of several pipeline developments suggests the market is strong and inventory is being absorbed.

Figure 32. 2020 Office Vacancy by Subarea

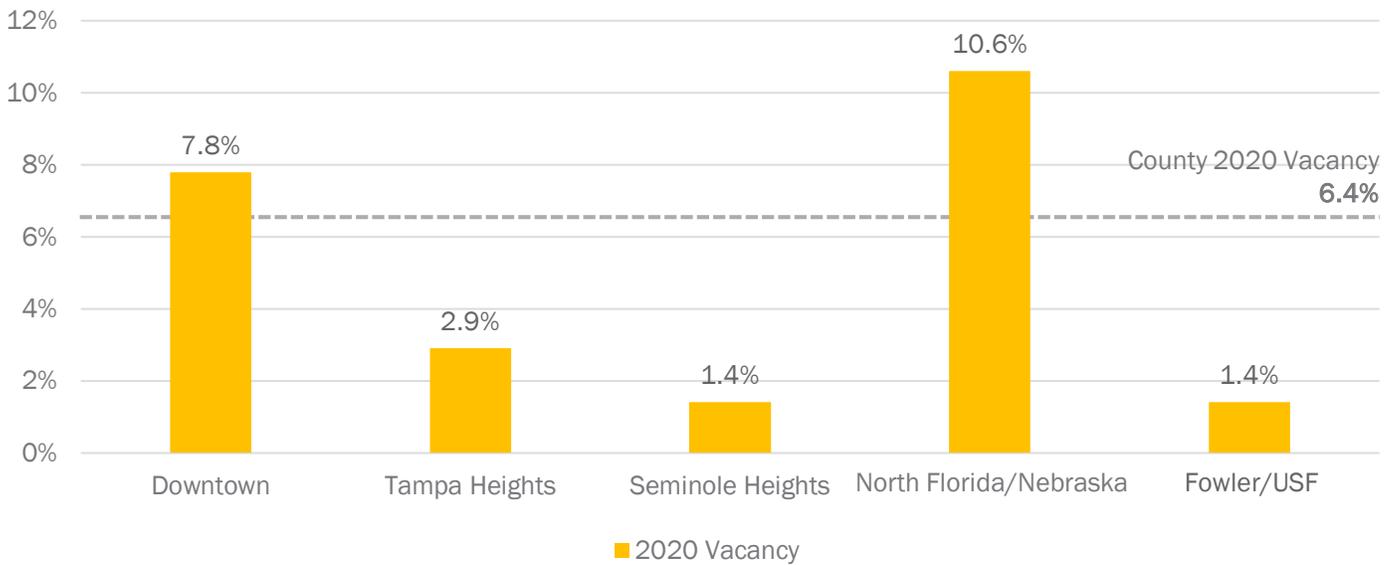


Figure 33. 2020 Gross Office Rent per Square Foot by Subarea



Source: CoStar, SB Friedman
 [1] 2019 data was used due to insufficient 2020 data



Demand for office space is typically driven by employment growth, which has been negatively impacted by COVID-19. In the near term, there could be a drop in demand for office space as health concerns encourage remote working policies and plans for expansions are delayed, which could cause declines in rent and increases in vacancy in the near term. Although the timing of when workers will return to the office remains uncertain, there could be a reversal in declining space per employee trends in the long term to allow for more space and privacy to workers.

OFFICE MARKET POTENTIAL

Each subarea was categorized based on market potential to deliver TOD-supportive office development (**Table 6**). The Downtown subarea is the strongest office market in the study area and one of the strongest markets in the region. The Downtown subarea provides a unique walkable, mixed-use office environment and is already producing TOD-supportive Class A office development. The Tampa Heights and Fowler/USF subareas are emerging areas with

specific advantages. The Heights District development has attracted recent Class A development and is leveraging its location on the periphery of downtown. The Fowler/USF subarea has the opportunity to attract new medical and professional office development around nearby hospital and university anchors and as part of planned, mixed-use environments. Proximity to these institutions offers unique opportunities for synergistic development, as seen with the proposed innovation district in the University Mall redevelopment in the Uptown District. The type of mixed-use environment that is proposed is also attractive for larger Class A office tenants, whose presence is fairly limited throughout the rest of the subarea. However, it appears that this redevelopment will likely need public support in the near term until the market is fully proven. Finally, the Seminole Heights and North Florida/Nebraska subareas are weaker and unlikely to attract new corporate or medical office development in the near term.

Table 6. Office Market Potential by Subarea

Subarea	Activity Center	Rents	Vacancy	New Investment	TOD-Readiness	Market Strength
Downtown	Corporate office	High	Average	Pipeline Development	Existing TOD subarea	Stronger
Tampa Heights		Average	Low	Pipeline Development	Potential for TOD	Emerging - Stronger
Seminole Heights		Low	Low	Limited	Limited Market Potential for TOD	Weaker
North Florida/Nebraska		Low	High	Limited	Limited Market Potential for TOD	Weaker
Fowler/USF	Medical office and innovation	Average	Low	Public Sector-Supported	Limited Market Potential for TOD	Emerging

6.4. RETAIL

The study area comprises 6.7 million square feet of retail space. Much of this space is older and limited new retail space has been constructed in the last 10 years. Recent retail development in the County has primarily located in Brandon and South Tampa where new residential development and developable land has led to proposals for or construction of several new big boxes.

RETAIL TYPOLOGIES

The study area includes a mix of retail typologies (Figure 34 and Map 35). The Fowler/USF subarea has the largest inventory of retail space with approximately 3.5 million square feet, most of which is part of the University Mall or auto-oriented retail. The North Florida/Nebraska subarea has the second most retail space and includes multiple community and neighborhood centers. The Seminole Heights subarea is primarily freestanding or smaller scale strip retail space, although there are a small number of mixed-use buildings. The Tampa Heights subarea has a limited amount of retail square footage but the traditional main street format along Franklin Street offers a TOD-supportive environment. Finally, the Downtown subarea comprises approximately 700,000 square feet of retail space and is one of the major hubs for restaurant and shopping in the City.

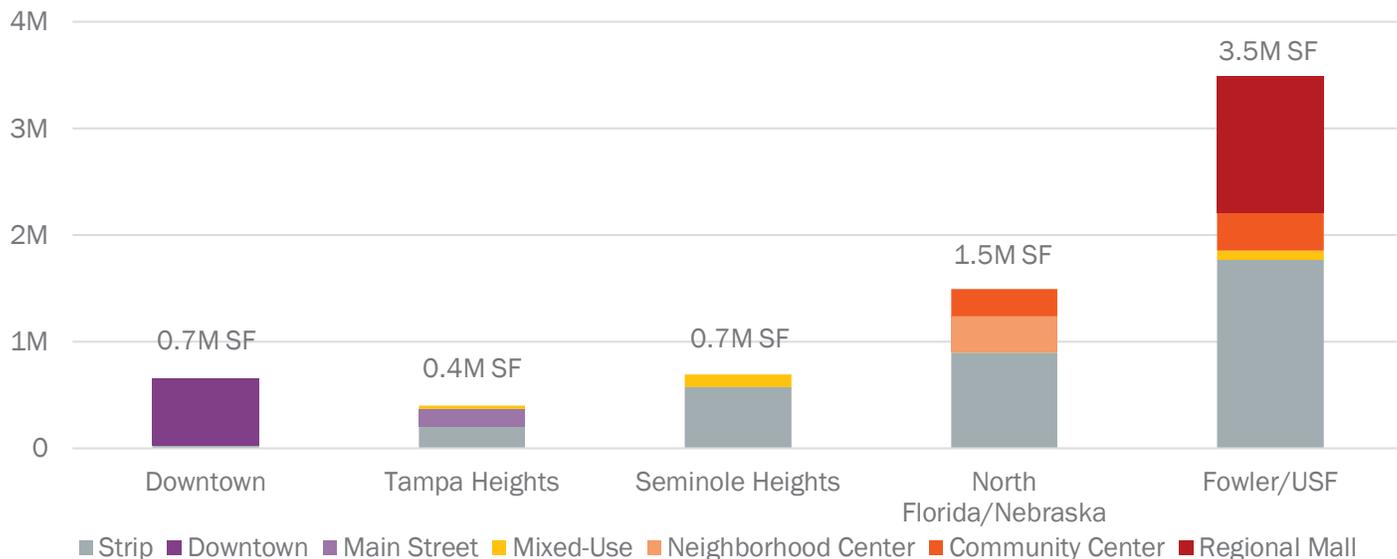
A significant proportion of the retail in the study area is of the strip or freestanding typology. This typology includes unanchored strip centers, full-service restaurant, auto-repair/scrap yards, fast food, breweries, and smaller-scale retail and the spatial distribution varies throughout the corridor. The Fowler/USF and North Florida/Nebraska subareas are primarily auto-oriented fast food, restaurants and unanchored strip centers, while the Seminole Heights and Tampa Heights subareas are primarily lower value auto-repair/scrap yard with some pockets of restaurants and breweries in the Seminole Heights subarea.

TRENDS

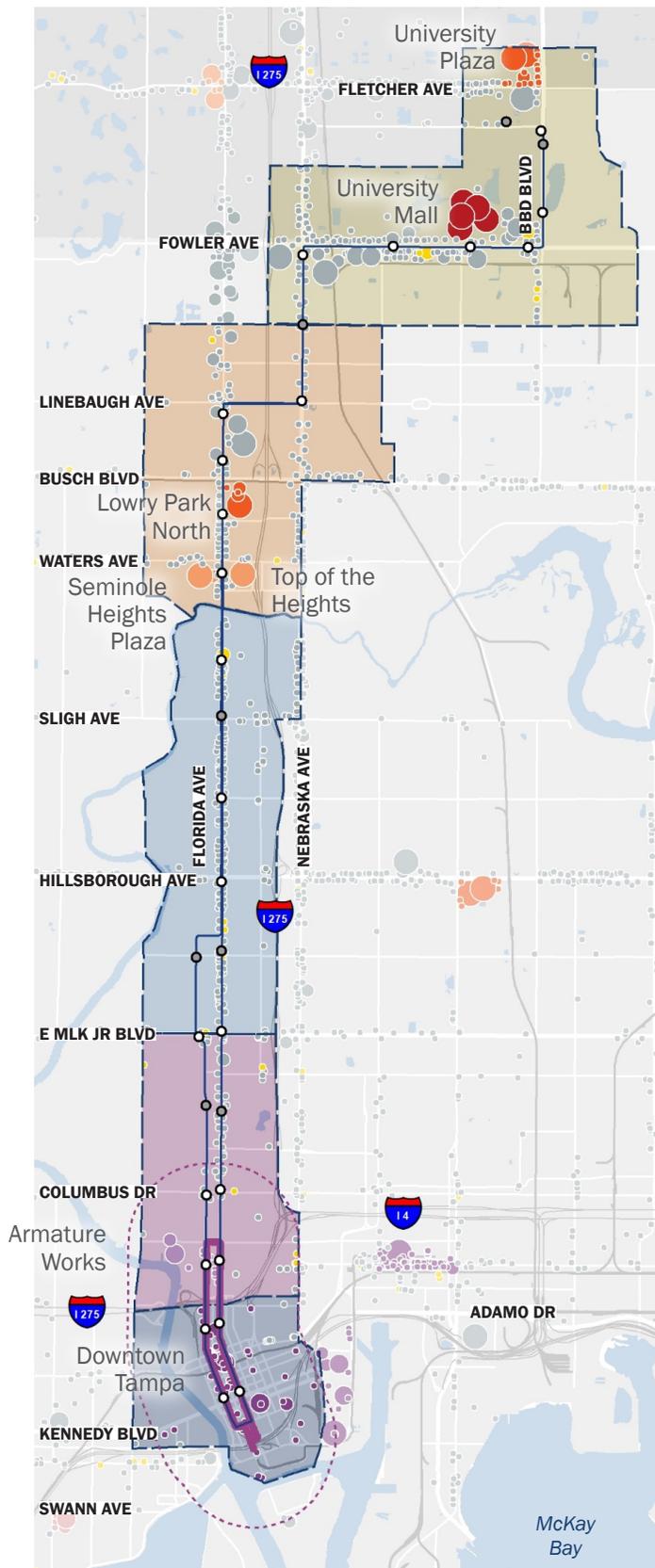
Nationally, e-commerce as a percent of total sales has more than doubled in the last ten years and is experiencing significant growth due to COVID-19. As a response to e-commerce, as well as health concerns related to COVID-19, retailers are rethinking store layouts and brick-and-mortar footprints. Even as closures for traditional retailers and department stores reach staggering levels nationally, longer term trends are likely to continue with growth in convenience and experience-oriented shopping (Figure 36).

Convenience-oriented retail provides easy access to a range of goods and services, and is typically developed in power, community and neighborhood centers that sell

Figure 34. Retail Inventory by Typology and Subarea (SF)



Source: CoStar, SB Friedman



Map 35. Retail Inventory by Typology

- Regional Mall
 - Downtown
 - Main Street
 - Community Center
 - Neighborhood Center
 - Mixed-Use
- Rentable Building Area (SF)
- More than 100K
 - 50K to 100K
 - 25K to 50K
 - Less than 25K



Source: CoStar, Esri, SB Friedman

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basic goods and services such as groceries. Within the study area, convenience-oriented retail is primarily located in auto-centric subareas, including the North Florida/Nebraska and Fowler/USF subareas.

Experience-oriented retail offers unique shopping and dining experiences, often in desirable and walkable environments. Within the study area, the Downtown subarea is the primary experiential destination with unique restaurants and cultural offerings while the Tampa Heights and Seminole Heights subareas both offer unique dining options including food halls, local breweries, and restaurants. Experience-oriented retail is currently experiencing significant challenges related to COVID-19 but is expected to recover post-pandemic.

As e-commerce is anticipated to grow and be accelerated by COVID-19, it could be challenging to attract retailers to fill larger vacant spaces. Thus, it will be necessary to consider alternative uses or redevelopment to reposition struggling retail centers. For example, interviews have indicated the vacant retail box at Fowler and Nebraska Avenues, formerly used as a flea market, is being redeveloped as a charter school. The proposal to redevelop the University Mall, which has several vacant anchor boxes, is anticipated to reposition the mall site as a mixed-use environment.

RETAIL EQUITY

Since a significant proportion of households in the study area are lower-income, retail access and equity is an important consideration (Map 37). A significant portion

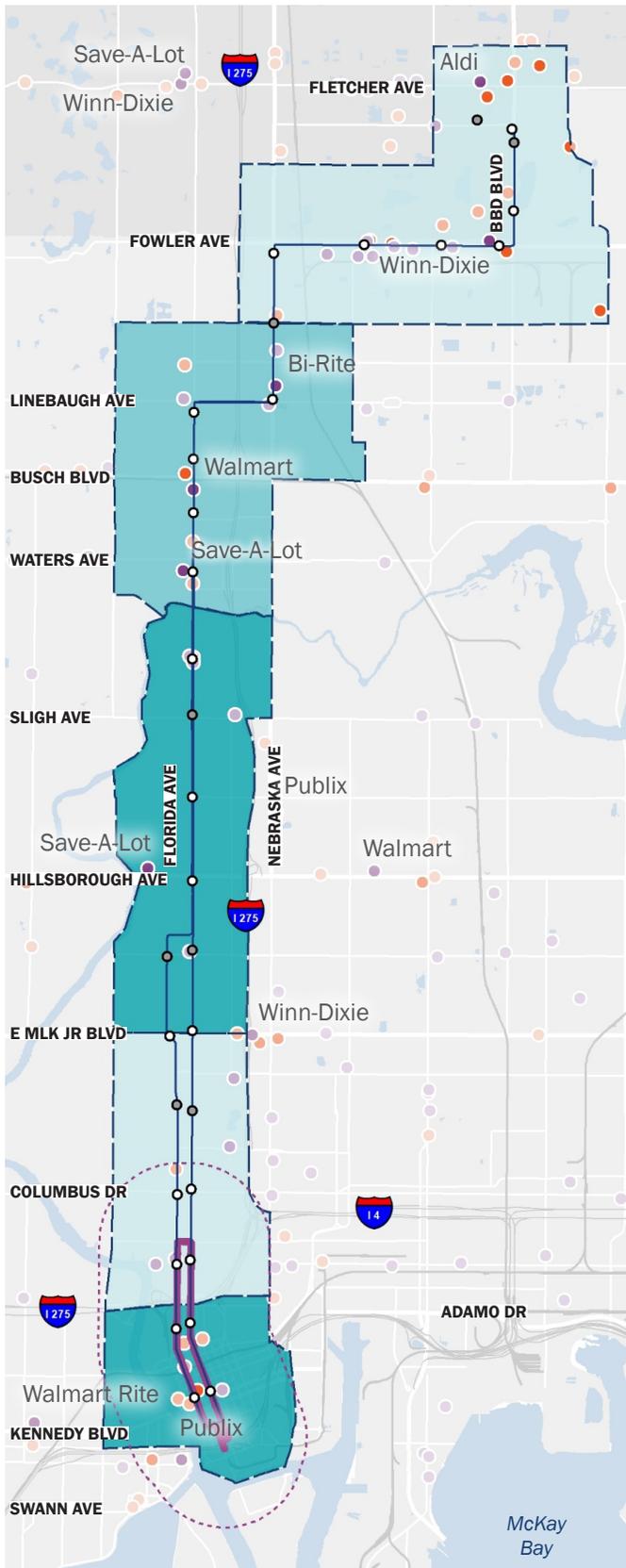
of the study area can benefit from better access to full-service grocery stores. Access to supermarkets is better in the Fowler/USF and North Florida/Nebraska subareas while there are no full-service supermarkets within the Downtown or Tampa Heights subareas, and only one (Save-A-Lot) within the Seminole Heights subarea. Poor access to grocery stores in the Tampa Heights subarea is compounded by the lower median household incomes of the area. Lower-income residents must travel farther to access full-service grocery stores than residents in higher-income areas.

RETAIL SUMMARY

The Downtown subarea has the strongest market potential for TOD-supportive retail (Table 7). The Downtown subarea leads in producing TOD-supportive retail development, as many new office developments contain ground-floor retail. Also, the entertainment and restaurant focus of retail in the Downtown subarea is anticipated to recover post-pandemic. The Tampa Heights and Seminole Heights subareas are emerging retail areas. The Tampa Heights subarea has momentum building in walkable environments around the Heights District and Franklin Street while the Seminole Heights subarea is experiencing investment in its neighborhood retail strips along Florida Avenue with new breweries and restaurants providing unique entertainment opportunities. The North Florida/Nebraska and Fowler/USF subareas are considered weaker markets for providing TOD-supportive retail. While these larger shopping centers provide convenience-oriented shopping opportunities, these subareas are challenged by relatively low levels of

Figure 36. Retail Trends





Map 37. Grocery and Pharmacy Locations

- National Supermarket Retailer
- Local/Specialty Grocery Retailer
- National Pharmacy
- Local Pharmacy

Median Household Income

- Less than 30% AMI
- 30% AMI to 60% AMI
- 60% AMI and Greater



Source: Esri, InfoUSA, SB Friedman

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recent private investment and auto-centric building formats which are not as conducive to walkable environments. The University Mall redevelopment provides an opportunity to reposition existing retail and provide supportive retail in a mixed-use environment. Other retail centers in these subareas may struggle to attract the investment needed to transition auto-oriented centers into more walkable retail formats.

As the pandemic continues, some retailers are likely to experience operating challenges that could increase the number of store closures. Near term success could be influenced by small business support and funding provided

through federal stimulus programs. However, the locations that were previously stronger retail hubs are anticipated to recover in the long term.

MARKET POTENTIAL SUMMARY

The market strength findings for each land use were synthesized to categorize each subarea’s overall market potential (**Table 8**). Overall, the Downtown subarea is the strongest market with TOD-supportive projects in the pipeline for all land uses considered. The Downtown subarea is a very active market and the prices, performance and development momentum all contribute

Table 7. Retail Market Potential by Subarea

Subarea	Vacancy	New Investment	TOD-Readiness	Market Strength
Downtown	High (market is absorbing influx of new space)	Pipeline Development	Existing TOD cluster	Stronger
Tampa Heights	Normal	Recent Development	Potential for TOD	Emerging-Stronger
Seminole Heights	Low	Limited	Potential for TOD	Emerging
North Florida/ Nebraska	Normal	Limited	Limited Market Potential for TOD	Weaker
Fowler/USF	Low	Limited	Limited Market Potential for TOD	Weaker



to its strength. The Tampa Heights and Seminole Heights subareas have emerging TOD potential. The Tampa Heights subarea is experiencing new office, retail, and residential development as part of the Heights District redevelopment and around Franklin Street. This area is poised for continued investment in the future. While the office market potential is limited, the Seminole Heights subarea has potential for neighborhood-scale TOD, especially for residential and retail uses. The North Florida/Nebraska subarea is characterized as a weaker market due to the relatively low levels of investment, low rents, and auto-centric formats that would dissuade TOD investment. If

the market shifts in the northern subareas, there may be potential for redevelopment of larger retail sites with higher vacancies. Finally, the Fowler/USF subarea has some potential for transit-supportive, mixed-use office projects with the redevelopment of the University Mall but would likely require public financial support as demonstrated by the Uptown District proposal. Outside of the creation of this new mixed-use environment, market potential is fairly limited for TOD-supportive formats in the subarea.

Table 8. Overall Market Potential by Subarea

Subarea	Residential	Office	Retail	TOD-Readiness	Overall Market Strength
Downtown	Stronger	Stronger	Stronger	Existing TOD Cluster	Stronger
Tampa Heights	Emerging	Emerging - Stronger	Emerging-Stronger	Potential for TOD	Emerging
Seminole Heights	Emerging	Weaker	Emerging	Potential for TOD	Emerging
North Florida/Nebraska	Weaker	Weaker	Weaker	Limited Market Potential for TOD	Weaker
Fowler/USF	Weaker	Emerging	Weaker	Limited Market Potential for TOD	Weaker-Emerging



THE HALL



PLANS & REGULATIONS



7. PLANS & REGULATIONS

The following section provides a review of existing plans and regulations shaping the potential for TOD investment within the study area. The nature of planned development surrounding proposed stops along the corridor and the quality of the pedestrian environment, as described in conceptual plans, local plans, and design guidelines for both streets and site development is an important consideration in TOD planning.

7.1. FUTURE LAND USE PLANS

Imagine 2040: Tampa Comprehensive Plan (2016)

In January 2016, the City of Tampa adopted the *Imagine 2040: Tampa Comprehensive Plan*, an award winning plan designed to shape the City's future for generations to come. The strategy for Tampa's future focuses growth where it can realize the greatest social, environmental, and economic benefits. Guiding Principles of the Plan pertinent to the TOD Pilot Project include the following:

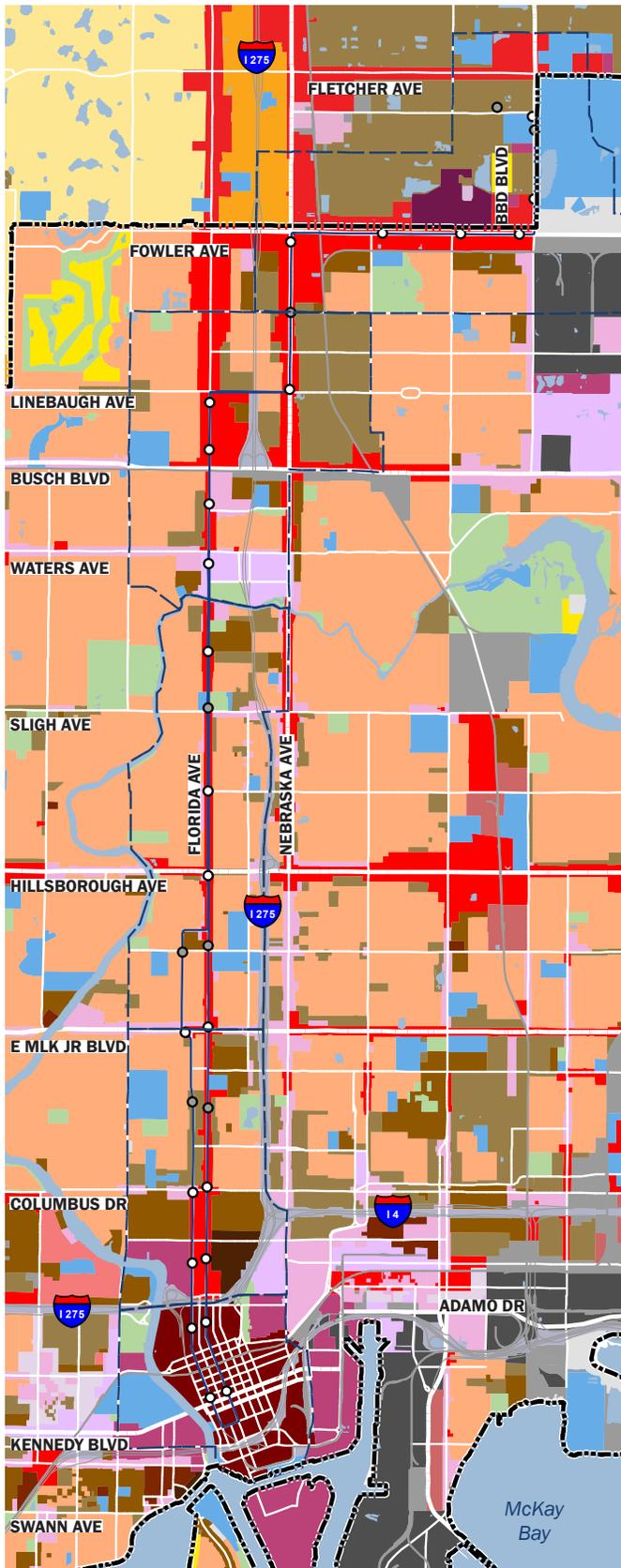
- Affordable housing choices that meet the needs of everyone at every stage of life
- Attractive, tree-lined streets with walkability between shops and housing
- A comprehensive, high quality, affordable mass-transit system that moves people quickly and conveniently
- A vibrant Downtown
- Beautiful architecture and excellent urban design that add character to the existing environment

Additionally, the plan includes future land use designations for the City (**Map 38** and **Table 9**). Along the proposed BRT alignment, much of the land in Tampa is designated as Central Business District (CBD), Community Commercial (CC-35), Residential-10 (R-10), Residential-20 (R-20), or Residential-35 (R-35). With the exception of R-10, these destinations allow for high to medium density/intensity.

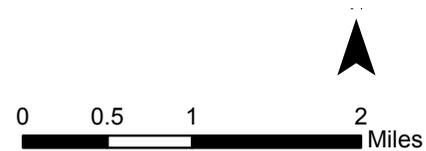
Unincorporated Hillsborough County Comprehensive Plan Future Land Use Element (2008)

Land within the study area north of Fowler Avenue and west of Bruce B. Downs Blvd falls within Unincorporated Hillsborough County and uses Future Land Use designations found in the Unincorporated Hillsborough County Comprehensive Plan. The Future Land Use Element is the foundation for the Comprehensive Plan, as it affects each Element within the plan through its designations and distribution of land uses. The basic Concept Plan, originally established in 1988, provides the physical structure to the Comprehensive Plan and the Future Land Use Element. The two most important features of the concept plan are the activity centers and corridors and the urban/suburban/rural choices available for living and working environments.

As shown in **Map 38** and **Table 10**, land along the proposed BRT alignment in Unincorporated Hillsborough County is mainly Office Commercial-20 (OC-20), Innovation Corridor Mixed-Use-35 (ICMU-35), or Residential-20 (RES-20). The ICMU-35 category intends to foster opportunities for live, work, and play developments in the Fowler/USF subarea.



Map 38. Future Land Use



Source: Plan Hillsborough MPO

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Table 9. Future Land Use Category Descriptions (City of Tampa)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
R-6	Residential-6. Low density uses, (single family detached)	<ul style="list-style-type: none"> Up to 0.35 	<ul style="list-style-type: none"> Up to 6 du/acre
R-10	Residential-10. Low density uses, (single family detached; limited townhomes; duplexes; accessory second units)	<ul style="list-style-type: none"> Up to 0.35 	<ul style="list-style-type: none"> Up to 10 du/acre
R-20	Residential-20, Medium and lower density uses, (multifamily dwellings; small-lot single family units)	<ul style="list-style-type: none"> Up to 0.5 Up to 2.0 in Ybor City Local Historic District only 	<ul style="list-style-type: none"> Up to 18 du/acre 20 du/acre with bonus provisions met
R-35	Residential-35, Medium density uses, (multifamily dwellings; small-lot single family units)	<ul style="list-style-type: none"> Up to 0.6 Up to 2.0 in Ybor City Local Historic District only 	<ul style="list-style-type: none"> Up to 30 du/acre
R-50	Residential-50, Medium density uses, (multifamily dwellings; small-lot single family units)	<ul style="list-style-type: none"> Up to 0.6 Up to 1.0 in for stand-alone office uses Up to 2.0 in Ybor City Local Historic District only 	<ul style="list-style-type: none"> Up to 35/acre with bonus provisions met
R-83	Residential-83, High density uses, (multifamily dwellings)	<ul style="list-style-type: none"> Up to .65 	<ul style="list-style-type: none"> Up to 75 du/acre Up to 83 du/acre with bonus provisions met
NMU-35	Neighborhood Mixed Use-35, Areas with no clear, identifiable development trend, (Single family and multi-family uses; neighborhood serving office and commercial uses)	<ul style="list-style-type: none"> Up to 1.0 for non-residential uses Up to 1.5 for vertical mixed-use of residential use 	<ul style="list-style-type: none"> Up to 35 du/acre
GMU-24	General Mixed Use-24, Areas with no clear, identifiable development trend, (residential, commercial, and light industrial uses)	<ul style="list-style-type: none"> Up to 1.5 	<ul style="list-style-type: none"> Up to 24 du/acre
UMU-60	Urban Mixed-Use-60, High intensity/density residential, professional office and commercial development. , (Intensive and general commercial, service, office and residential uses)		
CMU-35	Community Mixed-Use-35, Medium intensity/density horizontal and vertical mixed-use and single-use commercial and residential, (Retail, general commercial, service, office, and residential uses)	<ul style="list-style-type: none"> Standard Development: <ul style="list-style-type: none"> Up to 1.0 >1.0 up to 2.0 with performance provisions met Vertical Mixed-Use Development: <ul style="list-style-type: none"> Up to 1.5* .1.5 up to 2.0 with performance provisions met 	<ul style="list-style-type: none"> Up to 30 du/acre Up to 35.0 du/acre with bonus provisions met.
TU-24	Traditional Use-24, Areas with no clear, identifiable development trend, (Residential, commercial, and light industrial uses)	<ul style="list-style-type: none"> Up to 1.5 	<ul style="list-style-type: none"> Up to 24 du/acre



CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
RMU-100	Regional Mixed-Use-100, High intensity/density high-rise residential, major office, and regional serving commercial developments that because of their need for space, significant vehicular access, or intensity of use require locations related to major transportation facilities, (Intensive and general commercial, service, office and residential uses)	<ul style="list-style-type: none"> Up to 3.5 (mixed-use preferred) 	<ul style="list-style-type: none"> Up to 100 du/acre
CC-35	Community Commercial-35 , Medium intensity/density horizontal and vertical mixed-use and single-use commercial and residential. (Intensive and general commercial, service, office, and residential uses)	<ul style="list-style-type: none"> Standard Development: <ul style="list-style-type: none"> Up to 1.0 >1.0 up to 2.0 with performance provisions met Vertical Mixed-Use Development: <ul style="list-style-type: none"> Up to 1.5* .1.5 up to 2.0 with performance provisions met 	<ul style="list-style-type: none"> Up to 30 du/acre Up to 35.0 du/acre with bonus provisions met.
LI	Light Industrial, Manufacturing, research and development, flex space, industry incubators, professional office, and similar uses, (General industrial uses)	<ul style="list-style-type: none"> Up to 1.5 	N/A
HI	Heavy Industrial, Manufacturing, research and development, flex space, industry incubators, professional office, and similar uses, (Heavy industrial uses, residential development prohibited with the exception of limited accessory residential uses – i.e. on-site security guard)	<ul style="list-style-type: none"> Up to 1.5 	N/A
R/OS	Parks, Recreation Facilities Greenways, and Open Spaces, Parks, recreation facilities greenways, natural, managed, and cultivated open space, (Public or private recreational opportunities to surrounding neighborhoods, communities, and region; natural parks, woodlands, habitat, floodplains, areas with permanent open space easements, and buffers between urban areas)	N/A	N/A
P/SP	Public/Semi-Public, Public and quasi-public uses	N/A	N/A
CBD	Central Business District, High intensity/density high-rise residential, major office, and regional serving commercial developments encourage and maintain the development of Tampa's central core (Central Business District) as the principal governmental, financial, commercial, convention, and entertainment center of Hillsborough County.	N/A	N/A
R/W			

Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
R-4	<p>Residential, suburban scale neighborhood commercial, office uses, and multi-purpose projects. Non-residential uses shall meet locational criteria for specific land use.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>Suburban scale neighborhood commercial, office, multi-purpose, or mixed use projects limited to 175,000 sq. ft. or .25 FAR, whichever is less intense. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 4.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations which represent an ideal set of circumstances with regard to the compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>
R-6	<p>Residential, suburban scale neighborhood commercial, office uses, multi-purpose projects and mixed use development. Nonresidential uses shall meet established locational criteria for specific land use.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>Suburban scale neighborhood commercial, office, multi-purpose, or mixed use projects limited to 175,000 sq. ft. or .25 FAR, whichever is less intense. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 6.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations which represent an ideal set of circumstances with regard to the compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>



Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County) (Cont.)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
R-9	<p>Residential, urban scale neighborhood commercial, office uses, multi-purpose projects and mixed use development. Nonresidential uses shall meet established locational criteria for specific land use.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>Urban scale neighborhood commercial, office, multi-purpose, or mixed use projects limited to 175,000 sq. ft. or .50 FAR, whichever is less intense. All non-residential development which exceeds .35 FAR must be for office or residential support uses, not retail. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 9.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies, and applicable development regulations are being complied with, especially those regarding compatibility of proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>
R-12	<p>Residential, urban scale neighborhood commercial, office uses, multi-purpose projects and mixed use development. Nonresidential uses shall meet established locational criteria for specific land use.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>Urban scale neighborhood commercial, office multi-purpose or mixed use projects limited to 175,000 sq. ft. or .50 FAR, whichever is less intense. All non-residential development which exceeds .35 FAR must be for office or residential support uses, not retail. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 12.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives and Policies, and applicable development regulations are being complied with especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>

HART TOD Pilot Project

Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County) (Cont.)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
R-20	<p>Residential, neighborhood commercial, office uses, multi-purpose projects and mixed use developments. Non-residential uses shall meet established locational criteria for specific land use.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>Urban scale neighborhood commercial, office, multi-purpose, or mixed use projects limited to 175,000 sq. ft. or 0.75 FAR, whichever is less intense. All non-residential development which exceeds .35 FAR must be for office or residential support uses, not retail. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 20.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>
CMU-12	<p>Residential, community scale retail commercial, office uses, research corporate park uses, light industrial multi-purpose and clustered residential and/or mixed use projects at appropriate locations. Nonresidential land uses must be compatible with residential uses through established techniques of transition or by restricting the location of incompatible uses.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p> <p>Projects that are 20 acres in size or greater must demonstrate a mix of land uses in accordance with Policy 19.1. This acreage threshold will not apply to properties that have adopted plan amendments to a mixed use category after January 1, 2008.</p>	<p>Urban scale neighborhood commercial, office, multi-purpose, or mixed use projects limited to 175,000 sq. ft. or 0.75 FAR, whichever is less intense. All non-residential development which exceeds .35 FAR must be for office or residential support uses, not retail. Actual square footage limit is dependent on classification of roadway intersection where project is located.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 12.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>



Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County) (Cont.)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
UMU-20	<p>Residential, regional scale commercial uses such as a mall, office and business park uses, research corporate park uses, light industrial, multi-purpose and clustered residential and/or mixed use projects at appropriate locations.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p> <p>Projects that are 20 acres in size or greater must demonstrate a mix of land uses in accordance with Policy 19.1. This acreage threshold will not apply to properties that have adopted plan amendments to a mixed use category after January 1, 2008.</p>	<p>An intensity up to 1.0 Floor Area Ratio (FAR) shall be allowed for any single or mixed use. Allowable density shall be up to twenty (20) dwelling units per acre. All FAR calculations shall be on the basis of gross acreage as calculated in applicable portions of the Land Use Element and applicable development regulations.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 20.0 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. The maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>
RMU-35	<p>Residential, regional scale retail commercial, office and business park uses, research corporate park uses, light industrial, multi-purpose and clustered residential and/or mixed use projects at appropriate locations.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p> <p>Projects that are 20 acres in size or greater must demonstrate a mix of land uses in accordance with Policy 19.1. This acreage threshold will not apply to properties that have adopted plan amendments to a mixed use category after January 1, 2008.</p>	<p>An intensity up to 2.0 Floor Area Ratio (FAR) shall be allowed for any single or mixed use. Allowable density shall be up to thirty five (35) dwelling units per acre. All FAR calculations shall be on the basis of gross acreage as calculated in applicable portions of the Land Use Element and applicable development regulations.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 35 dwelling units per gross acre. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>

Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County) (Cont.)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
ICMU-35	<p>Residential, regional scale retail commercial, office and business park uses, bio-medical research, institutional, hospitals, research corporate park uses, light industrial, multi-purpose and clustered residential and/or mixed-use projects at appropriate locations.</p> <p>Projects developed will be generally consistent with the Policies of Objective 19 with the exception of acreage threshold.</p>	<p>An intensity up to 2.0 Floor Area Ratio (FAR) shall be allowed for any single or mixed use. Allowable density shall be up to thirty five (35) dwelling units per acre. All FAR calculations shall be on the basis of gross acreage as calculated in applicable portions of the Land Use Element and applicable development regulations. However, the residential portion of a project may be determined either by density or floor area ratio (FAR), whichever is more beneficial to the development.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). Fixed guideway transit routes can be found on the MPO Long Range Transportation Cost Affordable Capacity Improvement Projects Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 35 dwelling units per gross acre or 2.0 FAR may be utilized for residential uses whatever calculation is more beneficial to the development. Alternative methods for calculating density of certain uses are specified in the land development regulations. Density bonuses and credits may be considered in this category and are described in the Plan. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved, and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering</p>
OC-20	<p>Community commercial type uses, office uses, mixed use developments, and compatible residential uses.</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>General 0.75 FAR up to a maximum of 600,000 square feet, however, the commercial component cannot exceed 350,000 square feet, subject to applicable land development regulations. Additionally, all development which exceeds .35 FAR must be for office or residential support uses, not retail.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>Up to a maximum of 20.0 dwelling units per gross acre. This maximum residential density is provided only as a limit for application in situations in which all Goals, Objectives, and Policies, and applicable development regulations are being complied with, especially those regarding compatibility of the proposed development with surrounding land uses, existing and/or approved and with regard to the adequacy and availability of public facilities.</p> <p>No minimum lot size is required to support the concept of clustering and preservation of open spaces left in a natural state. See related policies regarding clustering.</p>



Table 10. Future Land Use Category Descriptions (Unincorporated Hillsborough County) (Cont.)

CATEGORY	DESCRIPTION	MAX FAR	MAX DU/ACRE
LI	<p>Processing, manufacturing and assembly of materials including food products, storage, furniture or apparel manufacturing, packaging plants, wholesaling, storage of non hazardous materials, warehouse/showrooms with retail sales (which occupy no more than 20% of the floor area of the principal use), offices, research/corporate parks as the predominant uses and subordinate uses or services such as hotels, motels, restaurants, suburban scale retail establishments, and recreational facilities. Free standing suburban scale neighborhood commercial uses are pursuant to locational criteria or 20% of the project's land area when part of a larger industrial/office park (greater than 300,000 square feet).</p> <p>Agricultural uses may be permitted pursuant to policies in the agricultural objective areas of the Future Land Use Element.</p>	<p>.75 FAR</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed-Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>No residential allowed. Except limited accessory residential (e.g. on-site security guard)</p>
P/QP	<p>Major existing and programmed government-owned facilities, and other public uses. This category also accommodates quasi-public uses such as private establishments generally available to the public for use; for example, churches, hospitals, schools, clubs, major (regional, district or community) recreation services and related uses, tourist attractions, utility, and transportation facilities. The Land Use Plan Map generally shows major existing or programmed facilities.</p>	<p>Public facilities and uses are located throughout the county. Intensities of future public uses shall be guided by the floor area ratios of surrounding plan categories, including those of adjacent jurisdictions, to insure compatibility with surrounding development.</p> <p>For properties that are located within 0.5 mile of a fixed-guideway transit station (light rail, bus rapid transit, etc.), the allowable densities/intensities and range of uses may be subject to the Goals, Objectives, and Policies related to Fixed Guideway Transit (See Objectives 54-57 and related policies). The location and type of fixed-guideway transit stations can be found on the MPO Long Range Transportation 2035 Cost Affordable Transit System Map. The Future Transit Envelope can be found on the Future Transit Envelope Map that is adopted as part of the Future Land Use Map Series.</p>	<p>-</p>

http://www.planhillsborough.org/wp-content/uploads/2012/10/FUTURE-LAND-USE_6_2014a.pdf

7.2. LAND USE & DEVELOPMENT PLANS BY SUBAREA

This section of the Context Assessment offers a review land use and developments by subarea, organized from south to north.

DOWNTOWN LAND USE & DEVELOPMENT PLANS

Invision Tampa Center City Plan (2012)

Adopted in 2012, this master plan envisions Downtown Tampa as an urban, mixed-use, transit-supportive city center. The *Invision Tampa Center City Plan* identifies the Downtown Core as an area to “encourage active streets” and “leverage existing market dynamics to enable future growth.” The *Invision Tampa Center City Plan* supports increased station area development with a goal of “enhancing the area’s mixed-use urbanism to develop dense, active spaces in the near-term that build a case for transit over time.”

The Plan identifies “Ten Moves Forward” for the City of Tampa to realize its vision. One of these is “rebalancing Tampa Street and Florida Avenue as local streets, joining neighborhoods while providing regional access.” The proposed BRT alignment, and the proposed streetcar extension would help move this goal forward.

The *Invision Tampa Center City Plan*’s vision statement asserts the following:

“We can no longer build communities that are solely reliant on the private automobile if we want to have a sustainable society. The amount of land and energy required for a transportation system based on cars is enormous. We must create environments that can easily be connected to efficient mass transit networks, but that also allow people to walk or bike to many of their daily destinations. Density and mixed land uses are critical parts of this equation, but so are the design details that make transit or walking an attractive option, not just a functional one.”

Downtown Tampa Parking Plan (2019)

The City of Tampa and the Tampa Downtown Partnership completed the *Downtown Tampa Parking Plan* in 2019. It is the first comprehensive analysis of parking in Tampa’s Central Business District. In the last decade, major changes in Downtown have greatly influenced its overall parking profile, adding new stress to the system. The plan addresses issues such as availability of parking, managing City-owned assets, and connecting parking

to key destinations through enhanced mobility options. Additionally, a three-phased strategy is included which involves the Tampa Downtown Partnership taking the lead to garner political support for the City making strategic parking changes, the City of Tampa reconsidering its management practices, and private parking operators adjusting their sales to the new market.

Parking Code Reform Proposal

Following the completion of the Downtown Tampa Parking Plan, the Tampa Downtown Partnership drafted recommendations for significant changes in City parking policy and regulations. These changes, taking the form of proposed amendments to the City’s zoning ordinance, are aimed at simplifying regulations, reducing development costs, leveraging investment in transit and multi-modal transportation improvements, and promoting active transportation alternatives. Specifically, the proposal calls for the following:

- Reducing residential parking requirements by half in the CBD and Channel District, and nearly all other use categories by half or more;
- Eliminating minimum parking requirements in the CBD for service uses typically serving employee and residential populations, such as retail, personal services (dry cleaners, pharmacies), and restaurants;
- Adding a formal way to substitute motorcycle, bicycle, and carshare parking for individual vehicle parking spaces and meet overall requirements;
- Adding to alternative methods of meeting what parking is required, including the ability to provide parking available to the general public instead of restricting it to serving a single use; and
- Including more neighborhood-appropriate reductions for Tampa Heights, modeled on parking management strategies already in use for Seminole Heights.

Central Park CRA Plan (2006)

In 2006, the *Central Park CRA Plan* was created to provide a strategy to eliminate conditions of blight found to exist within the area. Additionally, the Central Park area lies completely within Tampa’s Enterprise Zone (TEZ). This designation is for defined areas within a community that are experiencing high poverty, unemployment, and crime. Economic development is the main focus for the TEZ, with a secondary focus on human/social programs. To stimulate economic development in the TEZ, the Community Contribution Tax Credit allows any business in Florida to receive a 50% credit on Florida corporate income tax, insurance premium tax, or sales tax refund for donations to local community development projects within an Enterprise Zone.



Downtown CRA Plan (2005)

As stated in the final 2005 *Tampa Downtown Vision and Action Program*, the goal of the Downtown Community Redevelopment Area (CRA) is to “maintain and expand Downtown Tampa as the major economic and activity center.” The Downtown CRA’s goal is supported by objectives that guide development into a “highly compact and integrated urban center that encourages maximum social and economic benefit.” Today, the Downtown CRA’s goal is to maintain Downtown Tampa’s transit-supportive environment and reputation as a high-caliber urban center with quality residential, commercial, and recreational assets.

TAMPA HEIGHTS LAND USE & DEVELOPMENT PLANS

Tampa Heights CRA Plan (2007)

The City of Tampa declared the Tampa Heights area blighted and eligible for redevelopment in March 1999. The *Tampa Heights CRA Plan*, last updated in 2007, includes a description of initial redevelopment projects and provides a framework for coordinating public and private redevelopment. The purpose of preparing a redevelopment plan is to guide public and private actions to eliminate blighting conditions and provide for continued reinvestment in the neighborhood.

Tampa Heights - Franklin Street Vision (ongoing)

The Tampa Downtown Partnership is leading the *Franklin Street Vision* study aimed to foster the revitalization of the once bustling Downtown corridor, from Jackson Street to Palm Avenue. A project website is available for public feedback and includes an interactive mapping tool and survey. According to a July 2020 survey summary, respondents wanted more shops and restaurants; gathering areas, greenspace, shade and seating; and art, music, and events. Respondents valued continued redevelopment and rehabilitation; historic preservation; public gathering areas and greenspace; green infrastructure; pedestrian use (including limited or permanent selected street closures); and accessibility (streetcar).

Anticipated next steps include a detailed survey results analysis, stakeholder interviews, “walking charettes” within the corridor, targeted survey based on the above for the Franklin Street corridor, draft recommendations and reviews, and final recommendations.

The Heights District (ongoing)

The Heights is a \$820 million, 43-acre mixed-use development under construction in the Tampa Heights subarea. The completed development will add 1,500 residential units, 240 hotel rooms, 200,000 square feet of retail space, 300,000 square feet of office space, and three schools to the Tampa Heights neighborhood.

The Heights development is anchored by Armature Works, a 70,000 retail and event space and The Pearl, a 314-unit mixed-used residential development with 28,500 square feet of retail space. Armature Works is a redeveloped two-story building with retail space, a food market, three restaurants, a banquet hall, an event space, and a co-work office space. The development received \$21.5 million in funding from a tax-exempt bond for the construction of new roads, sidewalks and parking facilities, and improvements for the Tampa Riverwalk.

Armature Place and The Heights Union Creative Office Center are projects that are currently underway in The Heights development. Armature Place is a proposed redesigned main street within the development. The Heights Union Creative Office Center is an office and retail space. Construction began in 2019 and occupancy is expected to begin in 2020.

Robles Park Village Redevelopment

The Tampa Housing Authority is working with local architects and developers to produce a master plan for the existing 35-acre Robles Park Village site. The site is one of the first low-income housing projects in Tampa and includes 450 apartments in 67 buildings. Ground penetrating radar recently discovered that five of the buildings were constructed over hundreds of graves belonging to nearby Zion Cemetery. Effected residents were relocated while the redevelopment efforts take place. The master plan will preserve the area’s history by turning the historical Zion Cemetery into a park, as well as include nearly 1,000 new affordable homes. The Tampa Housing Authority, developer, and architect have all stated they are committed to working with the existing residents, the community, and historians to ensure their feedback is incorporated into the master plan.

SEMINOLE HEIGHTS LAND USE & DEVELOPMENT PLANS

Greater Seminole Heights Vision Plan (2009)

The *Greater Seminole Heights Vision Plan* aligns with the City of Tampa's larger vision to create livable places and communities. The vision and principles for this plan were drawn from a series of interactive charrettes and working sessions with area residents, property owners. The Vision Statements are as follows:

- Create a neighborhood with an integration of land uses, serving both the immediate residents and surrounding City, which focuses on pedestrian connectivity and instills 'walkability' throughout design.
- Create attractive, multi-use destinations that attract people and keep them there.
- Protect/Capitalize on existing character of single family residential portions of the area (seen as the area needing the least amount of change, one of their greatest assets)
- Develop mixed-use corridors with centralized structured parking to move away from the approach that all zoning lots have to be self-contained and provide all parking on site; adopt creative parking strategies to serve the area

Land-use related Guiding Principles within the document focus on maximizing mixed-use commercial development along the identified commercial/ mixed-use corridors, while ensuring the sensitive transition of uses from the core commercial areas into the surrounding stable neighborhoods. An improved pedestrian/bicycle environment, as well as maintained inventory of both residential and commercial historic structures were also high priority items within the plan.

NORTH FLORIDA/NEBRASKA LAND USE & DEVELOPMENT PLANS

At this time, no land use plans were found for this subarea.

FOWLER/USF LAND USE & DEVELOPMENT PLANS

University Area CDC's Neighborhood Transformation Strategy (2018)

The *University Area CDC's Neighborhood Transformation Strategy* focuses on a community development model that supports University Area residents by including them in the creation, implementation, and management process. The strategy aims to grow the community, one block at a time, by enabling residents to become change agents to improve the economic and social conditions of their community. The strategic direction is outlined in eight major initiatives

that revolve around building resident-friendly spaces, the identification of community blocks in need of support, crime reduction plans, identifying and organizing established and grass roots community leaders, and land banking efforts.

Tampa's !p: Innovation District

Tampa's !p is a multi-jurisdictional innovation district led by institutions that drive economic activity in the Fowler/USF subarea—engaging students and educators, health care workers, patients, and tourists. Anchor members include Busch Gardens, Advent Health, J.A. Haley Veterans' Hospital, Moffitt Cancer Center, RD Management, University Area CDC, and the University of South Florida.

Tampa's !p acts as one of the region's technology hubs and start-up incubators and comprises 25,000 acres in the northern part of Tampa, bound by Busch Blvd on the south, Bearss Avenue on the north, and interstates 75 and 275 on the east and west. It includes parts of Tampa, Temple Terrace and unincorporated Hillsborough County.

Rithm At Uptown (University Mall Redevelopment)

Rithm At Uptown is a 100-acre redevelopment project located at the old University Mall site in the Fowler/USF subarea. It is at the center of the Tampa Innovation Partnership's (Tampa's !p) plan to transform the area around the University of South Florida's main campus into a major employment center and hub for research and innovation.

The project is located adjacent to the Moffitt Cancer Center & Research Institute, AdventHealth, J.A. Haley Veterans' Hospital, and Shriners' Hospital for Children, as well as major employers Yuengling Brewery and Busch Gardens Tampa Bay. Once complete, Rithm At Uptown will be one of the largest, mixed-use innovation communities in the state with capacity for more than seven million square feet of development, including several thousand residential units.

MOSI Redevelopment

Hillsborough County has a Request for Proposals (RFP) for a master developer for redevelopment of the Museum of Science and Industry (MOSI) property. The response period closed on September 18, 2020. The County is seeking proposals from experienced master developers delivering mixed development urban projects.

According to the RFP, the County intends to establish future transit on this site and along Fowler Avenue. Coordination with The Planning Commission, MPO and FDOT will be necessary to ensure the redevelopment does not preclude the ability to support future transit.



The Board of County Commissioners (BOCC) has a Vision for the property that uses its redevelopment as a catalyst for change within the larger Innovation District. Ideally, the Project would include:

- An innovative and inclusive mixed-use development focused on sustainable design, healthy living, and leverages smart city technology while incorporating private, commercial, and retail uses with civic spaces that are thoughtfully designed.
- A development pattern that is dense, integrating mixed-uses and driving change by introducing desired targeted industries and economic drivers to the mix such as biosciences, life sciences, cyber security and other advanced industries.
- A true urban mixed-use project that embraces transit and other forms of sustainable mobility both within the development but also externally to the District and the larger region.

7.3. AFFORDABLE HOUSING PROGRAMS

Within the study area, there are approximately 7,150 units affordable to households earning 60% of the area median income, or approximately 56% of the total units; of these units, 31% are legally restricted affordable housing and 25% are naturally occurring affordable housing.

Hillsborough County and the City of Tampa are currently implementing plans and policies to preserve and increase affordable housing in the region and the project station areas.

Hillsborough County Five Year Consolidated Plan Program Years 2016 – 2020

Hillsborough County's 2016-2020 Five Year Consolidation Plan provides the framework for the use of funds received from the U.S. Department of Housing and Urban Development (HUD). The Plan identifies challenges and barriers to affordable housing that effect the County's ability to provide affordable housing in the future, as well as identification of specific strategies to remove these barriers.

City of Tampa Annual Action Plan (2018)

The Annual Action Plan presents the City of Tampa's strategic approach to housing activities and community development for the fiscal year 2018-2019. The plan considers market conditions for a wide range of housing characteristics, including the number of available housing units; cost and condition of housing; homeless facilities and services; special needs facilities and services; and barriers to affordable housing. The City recognizes the

critical importance of maintaining its supply of affordable housing and has selected a number of projects designed to enhance the supply of affordable housing, and increase access to sustainable housing options for low-income residents across the City. In particular, the City will fund three programs through its Community Development Block Grant (CDBG) allocation for housing counseling services. The first program is offered through the Center for Affordable Homeownership, which provides housing counseling services to help low-moderate income families achieve homeownership. A total of \$180,000 will be awarded to three organizations to administer the housing counseling services, assisting in processing applications for the City's Mortgage Assistance Program (MAP). The program is expected to assist approximately 150 clients within the City.

The Imagine 2040: Tampa Comprehensive Plan

Goal ten in the Comprehensive Plan's Land Use section is to recognize that community prosperity, and neighborhood health and revitalization is dependent upon quality housing for its citizens. Policy 10.1.1 calls to continue to promote the benefits of affordable housing programs and urban neighborhoods. Additionally, Policy 10.2.3 states to continue to encourage the revitalization of abandoned properties and renovate buildings for the housing needs of special populations and seek public-private partnerships to provide affordable housing.

The first goal of the Comprehensive Plan's Housing section is to provide a range of housing options by 2040 to address the future housing needs of Tampa's diverse population.

Tampa Mayor Jane Castor's Affordable Housing Advisory Team

The Affordable Housing Advisory Team will complement three other teams that have been launched to focus on Workforce Development, and Transportation and Development Services, respectively. The Advisory Teams are vital to helping guide the Mayor's strategic visioning for key City priorities.

In February 2020, the Mayor unveiled a series of initiatives to align with the city's housing affordability needs. These actions include the creation of community land trusts; restoring and preserving at least 100 existing housing units each year through partnerships with community groups, as well as updating the city's land development code to amend the city's parking minimums and maximum density allowances.

HART TOD Pilot Project

Dare to Own The Dream Program

The City of Tampa offers down payment assistance loans to income eligible home buyers of property within the City limits of Tampa. The program provides up to \$30,000.00 to assist income eligible first-time homebuyers to achieve the dream of homeownership.

Tampa's Community Heroes Homeownership Program

The Community Heroes Program, presented by the City of Tampa Housing and Community Development (HCD) Division in partnership with Federal Home Loan Bank-Atlanta, provides housing assistance to first responders. The program provides funds to match the City's down payment assistance program. Eligible participants can receive a \$5,000 grant to match the \$15,000 provided through the City's "Dare to Own the Dream" program. Eligible buyers include: law enforcement personnel, fire rescue personnel, K-12 public school staff, and other first responders.

7.4. MOBILITY IMPROVEMENT PLANS

Mobility improvement projects from the City of Tampa, Hillsborough County, and FDOT are illustrated in **Map 39**. Those that are related to the corridor are briefly summarized in this section, and organized by subarea. Additionally, large-scale and corridor-wide plans are summarized.

DOWNTOWN MOBILITY PROJECTS

City of Tampa Capital Improvement Plan Projects

1. Streetcar Extension. The Tampa Historic Streetcar System is a 2.7-mile long streetcar transportation network that provides a unique connection from Downtown Tampa to Ybor City. The City plans to extend and modernize the current system in partnership with FDOT and HART. The Invision Tampa Streetcar project is supported with funding from the City of Tampa, HART, and FDOT, with potential for federal funding through the Federal Transit Administration's (FTA) Small Starts Capital Improvement Grant program. More information on this project is available later in this section.

2. West River Multi-modal Safety & Network Improvements. In early 2020, the City of Tampa submitted an application to the USDOT to complete a package of mobility and safety improvements in the West River area. In the Fall of 2020, the City of Tampa received notice of a \$24M award from the USDOT under the Better Utilizing Investments to Leverage Development (BUILD) Transportation Discretionary Grant Program.

The project involves completing the remaining gaps in what will be a 12.2 mile multi-use pathway and installing enhanced crossing features at major roadways. Several adjacent city streets will also be enhanced to provide better sidewalks, bike facilities, and improved safety for the community. The project will expand connections and provide a variety of safe mobility options for pedestrians and bicyclists throughout the neighborhoods that make up the West River area.

3. West Fortune Street Complete Streets Project.

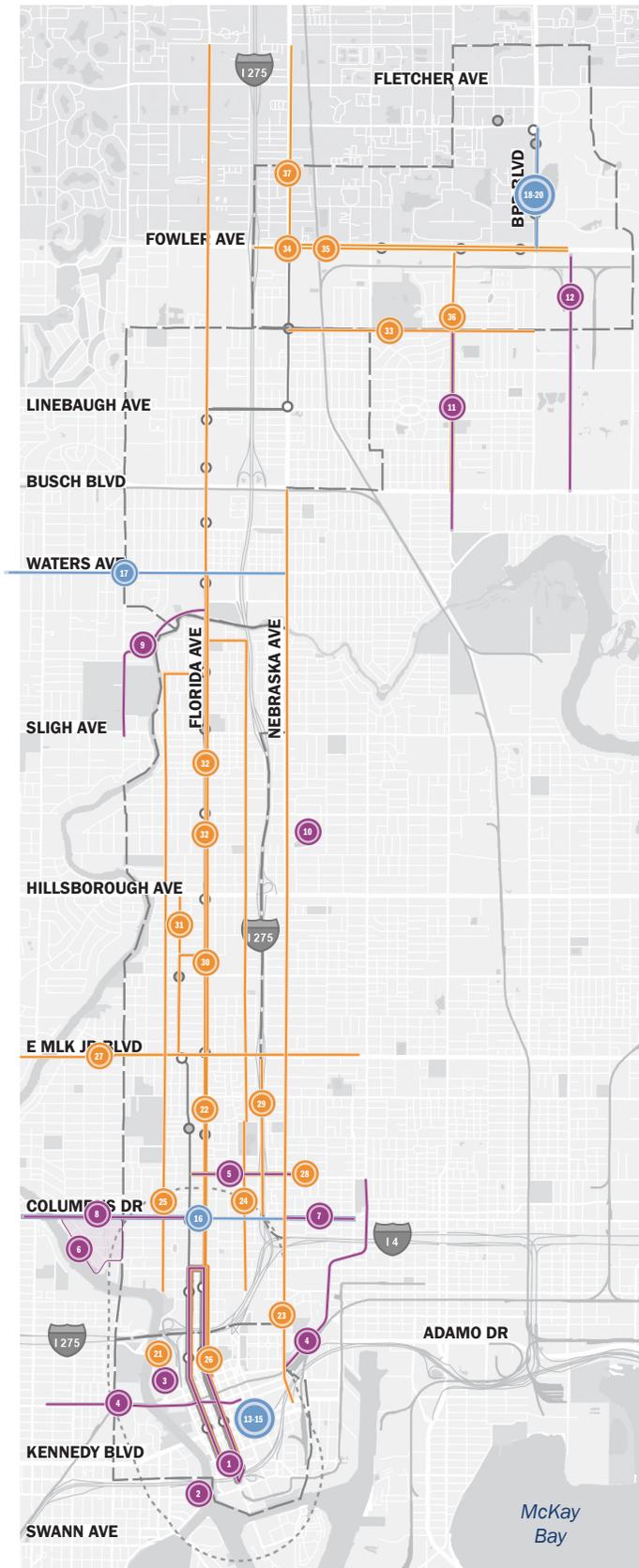
The limits of the West Fortune Street Complete Streets project spans from Laurel Street to Ashley Drive, and the project is currently being evaluated for complete streets improvements along the corridor. The City is working to develop alternative corridor concepts which may incorporate complete streets elements such as widened sidewalks, raised intersections and pedestrian crossings, pedestrian actuated flashing beacons ("RRFB's), curb extensions, and median islands.

4. East-West Green Spine Phases 2 & 3. This project consists of an urban trail/cycle track along Cass Street, Nuccio Parkway, and 15th Street to connect North Hyde Park from Howard and Armenia Avenues, as well as Tampa Heights, Ragan Park, and VM Ybor to the Hillsborough River. The cycle track would begin at Howard Avenue and Cass Street near the Armory. It will follow Cass Street into Downtown to Nebraska Avenue, then Nuccio Parkway into Ybor City, then 15th Street to Cuscaden Park at 21st Avenue. The project was part of the Invision Tampa Center City Plan to provide pedestrian and bicycle access between North Hyde Park, Downtown, and Ybor City. It will provide a safe and accessible bicycle connection to the Tampa Riverwalk and a safe connection between neighborhoods.

Hillsborough County Capital Improvement Projects

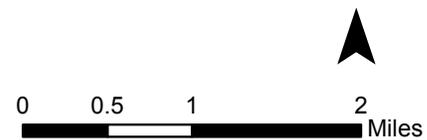
13. Annual Localized Pedestrian Safety Improvement (CIP #: 69638100). This project is part of the annual countywide Pedestrian Safety & Mobility Program to identify, plan, design, and construct small localized traffic safety improvements. The project intends to respond to customer requests due to safety concerns for pedestrians and users of alternative modes of transportation. The objectives of this project are to improve the safety of pedestrians in the County and improve safety for users of alternative modes of transportation in the County.

14. Annual School Walking Area Project Development (CIP #: 69676002). The Safe Routes to School Program (SRTS) runs a prioritization process every year to plan and



Map 39. Mobility Improvement Projects

- City of Tampa
- Hillsborough County
- FDOT



Source: Various, HDR

HART TOD Pilot Project

propose projects to be funded for design and construction under the Capital Improvement Program. This project is for annual SRTS planning and project development activities for high priority projects. The objective of this project is to improve pedestrian and bicyclist mobility for students and the community at large.

15. Annual Pedestrian Safety Improvements with Resurfacing Projects (CIP #: 69638200). This project is part of the annual countywide Pedestrian Safety & Mobility Program. This project provides safety improvements for pedestrians and users of alternative modes of transportation in coordination with maintenance resurfacing projects. The objectives of this project include improving the safety of pedestrians for the community at large and improving safety and accommodations for users of alternate modes of transportation in the county.

Florida Department of Transportation Work Program

The following projects were identified in the FDOT Work Program for 2021-2025.

- **21. Doyle Carlton Dr/Laurel St Roundabout (FPN: 4439681)** Construct Roundabout PE: 2022; CST: 2024
- **22. USB 41/SR 685/Florida Ave/Tampa St from Kennedy Blvd to Bears Ave (FPN: 4434442)** Integrated Corridor Management Intelligent Transportation Systems PE: 2024; DSB: 2024
- **23. US 41/SR 45/Nebraska Ave from Kennedy Blvd to Busch Blvd (FPN: 4434921)** Pedestrian Crossings PE: 2022; CST: 2024

TAMPA HEIGHTS MOBILITY PROJECTS_

City of Tampa Capital Improvement Plan Projects

5. Floribraska Avenue Complete Streets Project (Tampa Street to 9th Street). This project reconfigures the existing 4-lane undivided roadway to a complete street with two 10-foot travel lanes separated by a two-way left-turn center lane plus an on-road bidirectional cycle track, with a raised separator on the southern side of the road. The proposed improvements also include wider sidewalks, raised pedestrian refuge islands, and crosswalks at the intersections of both Jefferson Street and Central Avenue.

The improvements will reduce conflicts and sight obstruction hazards along the corridor making it safer for all users in accordance with the City's Vision Zero initiative while maintaining the existing roadway's level of service.

6. Ridgewood Park Neighborhood Resurfacing and Traffic Calming. This proposed project improvement includes, milling and resurfacing of roadway, traffic-calming installments to improve public safety, re-profiling roads to improve drainage conditions and to mitigate standing water issues, and ADA upgrade of non-compliant curb ramps.

7. Columbus Drive Complete Street from Nebraska Avenue to 14th Street The 0.4 mile segment of Columbus Drive from Nebraska Avenue to 14th Street is a 2-lane (one travel lane in each direction) arterial roadway with a posted speed of 30 mph and has an average daily traffic volume of 10,210 vehicles per day.

The complete street design prioritizes pedestrian safety, enhances the transit stops along the corridor and provides cyclists with options while maintaining vehicular capacity and on-street parking.

8. West Columbus Drive Safety and Mobility Improvements. The City of Tampa is coordinating with Hillsborough County on a project to resurface Columbus Drive from east of Dale Mabry Highway to Nebraska Avenue. As part of this project, the County will be resurfacing the roadway pavement, updating the roadway striping and signs, addressing ADA deficiencies, and making minor safety improvements.

The City has proposed a modification to the roadway cross section of Columbus Drive from Howard Avenue to North Blvd This road diet would improve safety and mobility for all roadway users, including pedestrians, cyclists, and motorists.

This project reconfigures the existing 4-lane undivided roadway to provide for two travel lanes separated by a two-way center left turn lane and on-street bicycle lanes. The project includes new pedestrian crosswalks with push-button activated flashing beacons at six locations along the corridor between Dale Mabry Highway and Nebraska Avenue.

Hillsborough County Capital Improvement Projects

16. W Columbus Dr / E Columbus Dr Resurfacing Project (CIP #69631105). This project is part of the Roadway Pavement Preservation Program, which includes condition inspection, routine repairs, preventative maintenance treatments, and road repaving projects. This includes resurfacing along Columbus Drive from Dale Mabry Highway to 13th Street. The objectives of this project include maintaining the County's roads in a safe and serviceable condition for the lowest cost to the community and improving travel reliability and efficiency of the existing roadway to support a multi-modal system.



Florida Department of Transportation Work Program

The following projects were identified in the FDOT Work Program for 2021-2025.

- **24. Central Ave Bikeway from W 7th Ave to USB 41/N Florida Ave (FPN: 4405116)** Construct On-Street Bike Facility PE: 2022; CST: 2024
- **25. Ola Ave Bikeway from W 7th Ave to USB 41/N Florida Ave (FPN: 4405115)** Construct On-Street Bike Facility PE: 2021; CST: 2023
- **26. US 41B/N Tampa St & N Florida Ave from E Tyler to Dr MLK Jr Blvd (FPN: 4405112)** Multi-modal Safety Improvements CST: 2024
- **27. SR 574/W MLK Blvd from West of Dale Mabry Hwy to East of I-275 (FPN: 4434453)** Integrated Corridor Management PE: 2021, 2022; DSB: 2022
- **28. Floribraska Ave from N Tampa St to 9th St (FPN: 4366401)** Convert From 4 Lane To 2 Lane Divided, Install Bike Lanes CST: 2021
- **29. I-275/Sr 93 from North of I-4 to North of MLK (FPN: 4437701)** Operational Improvements, Transition to Sect 7. G/W 4318212 DSB: 2021
- **30. Tampa St/Highland Ave & Florida Ave from MLK Blvd To South of Waters (FPN: 4405113)** W Violet St from Highland to N Florida PE: 2022; CST: 2025

SEMINOLE HEIGHTS MOBILITY PROJECTS

City of Tampa Capital Improvement Plan Projects

9. Green ARtery Segment E. The Green ARtery's goal is to connect a network of trails and paths to the Hillsborough River, McKay Bay, neighborhood assets, neighborhood parks, natural springs, tree-canopied streets, public art, and other attractions around Tampa's core. The mission of the neighborhood-based effort is to identify, enhance, and expand pedestrian/wheelchair, bike paths, parks, greenways, and trail systems that safely connect green spaces through the City, while emphasizing existing assets and the need to continue building upon them. City and Metropolitan Planning Organization's Walk-Bike Plan Phase V concept calls for a connected trail system from Downtown Tampa, running east to Ybor City, north to the Hillsborough River, and west and south to the northern end of the Tampa Riverwalk.

10. Hampton Terrace Neighborhood Resurfacing and Traffic Calming. This project will construct improvements within the Hampton Terrace Neighborhood Association. The limits of this project are multiple streets between Nebraska Avenue and 15th Street from east to west, and between E

Henry Avenue and E Hanna Avenue from south to north. The project will rehabilitate the existing roadway and improve drainage conditions throughout the neighborhood. Additionally, the City will be installing traffic calming measures to address the speeding issues and pedestrian safety.

Florida Department of Transportation Work Program

- **31. N Highland Ave from W Violet St to SR 574/Hillsborough Ave (FPN: 4405114)** Reconstruct Curb Line To Add Shared Use Path PE: 2022; CST: 2025
- **32. SR 685/USB 41/Florida Ave at Idlewild and Knollwood St (FPN: 4435832)** Install Pedestrian Crossings with Overhead Structure CST: 2022

NORTH FLORIDA/NEBRASKA MOBILITY PROJECTS

City of Tampa Capital Improvement Plan Projects

11. 30th Street Complete Streets Project (E Yukon St to E Fowler Ave). This project provides for enhanced multi-modal connections and safety improvements throughout the 30th Street corridor for approximately 1.8 miles from Yukon Street to Fowler Avenue. Possible improvements that the City is considering include roundabouts at the intersections of Yukon Street and Bougainvillea Avenue, enhanced pedestrian crosswalks near pedestrian attractors, intermittent landscaped medians, bike lanes, additional or widened sidewalks and trails, resurfaced roadway, landscaping, and resilient drainage infrastructure.

The proposed improvements will provide traffic calming to maintain safer speeds and provide enhanced bicycle and pedestrian infrastructure along the corridor making it safer for all users in accordance with the City's Vision Zero initiative.

Hillsborough County Capital Improvement Projects

17. W Waters Ave / E Waters Ave Resurfacing Project (CIP #69631107). This project is part of the Roadway Pavement Preservation Program, which includes condition inspection, routine repairs, preventative maintenance treatments, and road repaving projects. This includes resurfacing along Water Avenue from Armenia Avenue to Nebraska Avenue. The objectives for this project include maintaining the County's roads in a safe and serviceable condition for the lowest cost to the community and improving travel reliability and efficiency of the existing roadway to support a multi-modal system.

HART TOD Pilot Project

Florida Department of Transportation Work Program

- **33. N 109th Ave from US 41/N Nebraska Ave to N 30th St (FPN: 4468751)** Complete Streets and Safety PE: 2021

FOWLER/USF MOBILITY PROJECTS

City of Tampa Capital Improvement Plan Projects

12. 46th Street Walk-Bike Improvements Project (E. Busch Blvd to E. Fowler Ave). The 1.5-mile segment of 46th Street from Busch Blvd to Fowler Avenue is a two-lane (one travel lane in each direction) collector roadway with a posted speed of 35 mph and has an average daily traffic volume of 3,880 vehicles per day. This project is supported as documented and prioritized in the MPO-City of Tampa Walk-Bike Plan Phase I – Final Report.

The proposed improvements are summarized as follows:

- Install shared lane markings from Busch Blvd to Bougainvillea Ave;
- Widen the sidewalk to construct a shared-use path from Bougainvillea Ave to Fowler Avenue.
- Safety improvements at 46th Street and Linebaugh Avenue.

Hillsborough County Capital Improvement Projects

18. Bruce B. Downs (CR 581) from USF Pine Drive to Fletcher Ave (CR 582A) Sidewalk Improvements (CIP #: 69638030). This project is part of the Pedestrian Safety and Mobility Enhancement Program. This includes installation of a 5 feet wide sidewalk on the east side of Bruce B. Downs Blvd from USF Pine Drive to Fletcher Avenue. The objectives for this project include enhancing pedestrian facilities to improve the safety and mobility for pedestrians and bicyclists in high safety and mobility need locations and improve traffic mobility.

19. Bruce B. Downs and Richard Silver Way Intersection Improvement Project Intersection Improvements (CIP #: 69645129). The intersection will be designed for improvements on Bruce B. Downs Blvd and Richard Silver Way at the VA Hospital with geometric improvements, addition of a traffic signal, and pedestrian features on all corners. Sidewalks will be added or replaced to improve pedestrian connectivity through the corridor specifically ADA ramps, curbing, and pavement markings. The objectives for this project include adding a new traffic signal at the intersection of Bruce B. Downs Blvd and Richard Silver Way (entrance to the James A. Haley Veteran's Hospital). Geometric improvements to the

existing turn lanes will be made to support the new traffic signal and enhancing pedestrian safety ADA accessibility features will be added to all corners of the intersection.

20. Bruce B. Downs Blvd at Campus Hill Dr Intersection Improvements (CIP #: 69645116).

The project includes geometric improvements, addition of a traffic signal, and pedestrian features on all corners. Sidewalks will be added or replaced to improve pedestrian connectivity through the corridor. ADA ramps, curbing, and pavement markings will be brought to standards. The objectives of this project include improving transportation mobility and safety for vehicles and pedestrians and upgrading existing transportation facilities, including retrofitting for ADA compliance to provide services that improve access for all users.

Florida Department of Transportation Work Program

- **34. SR 582/Fowler Ave from I-275 to I-75 (FPN: 4456521)** Safety and Operation Improvements PE: 2025
- **35. SR 582/Fowler Ave from N Nebraska Ave to Morris Bridge Rd (FPN: 4455511)** Corridor Lighting Enhancement/Update PE: 2022; CST: 2024
- **36. N 22nd St from SR 580/E Busch Blvd to Sr 582/Fowler Ave-(FPN: 4468741)** Complete Streets and Safety PE: 2021
- **37. SR 45/Nebraska Ave from Fowler Ave to Florida Ave (FPN: 4455551)** Add/Enhance Corridor Lighting PE: 2022; CST: 2024

LARGE-SCALE & CORRIDOR-WIDE MOBILITY PLANS

Invision Tampa Streetcar

As discussed previously in this section, the City of Tampa is completing project development activities for the *Invision Tampa Streetcar* project. These activities were designed to identify improvements to the existing Tampa Streetcar system to better serve the mobility needs of residents, workers, visitors, and students in Downtown Tampa, Ybor City, Channel District, and surrounding urban neighborhoods. The project is led by the City of Tampa in partnership with the Florida Department of Transportation (FDOT) and the Hillsborough Area Regional Transit Authority (HART). Project activities included intensive public engagement and close coordination with other local and regional transit initiatives.

The project team evaluated multiple corridors for the extension of the system through Downtown and surrounding urban neighborhoods. Project objectives prepared during the first phase call for the full alignment—



the existing system plus the extension—to be designed to provide a “one seat” trip, maximize exclusive transit guideway operations, minimize community and environmental impacts, and offer high levels of service with full-day and evening operations and 10- to 15-minute service frequency.

After a final preferred alignment was selected, additional analyses were conducted to determine preferences for initial concept of operations, vehicle technology, guideway configurations, stop locations and design concepts, and modernization improvements along the existing system, including improvements to the existing vehicle maintenance facility to accommodate modern streetcar vehicles (**Figure 40**).

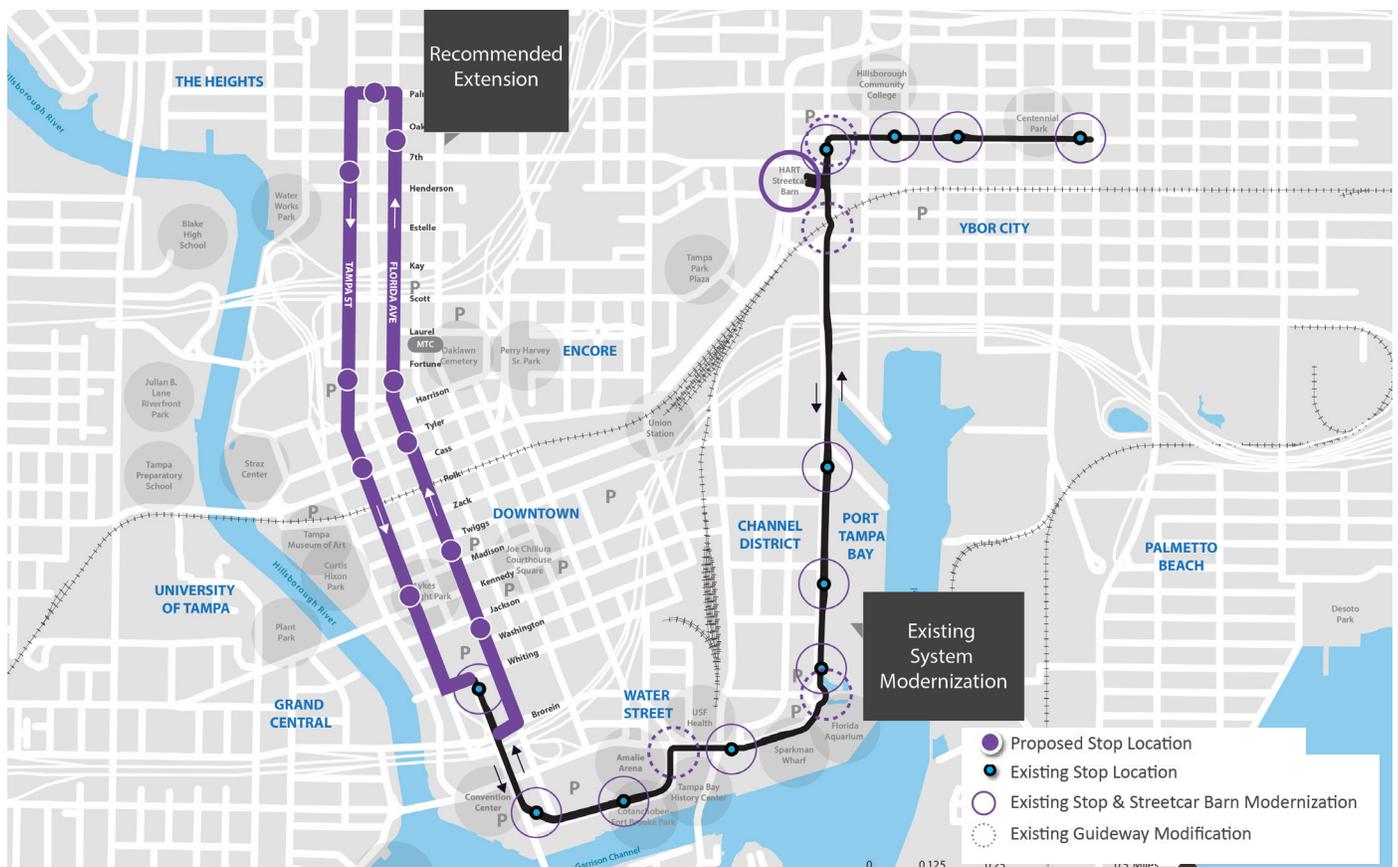
In August of 2020, the City submitted the required project justification documentation to the Federal Transit Administration for a small starts ratings.

HART Tampa Arterial BRT Study

HART’s BRT Arterial Study examines the potential for a Bus Rapid Transit line with all exclusive guideway and full Transit Signal Priority focusing on the current Nebraska Avenue, MetroRapid corridor, Fowler Avenue corridor, and the Florida Avenue corridor.

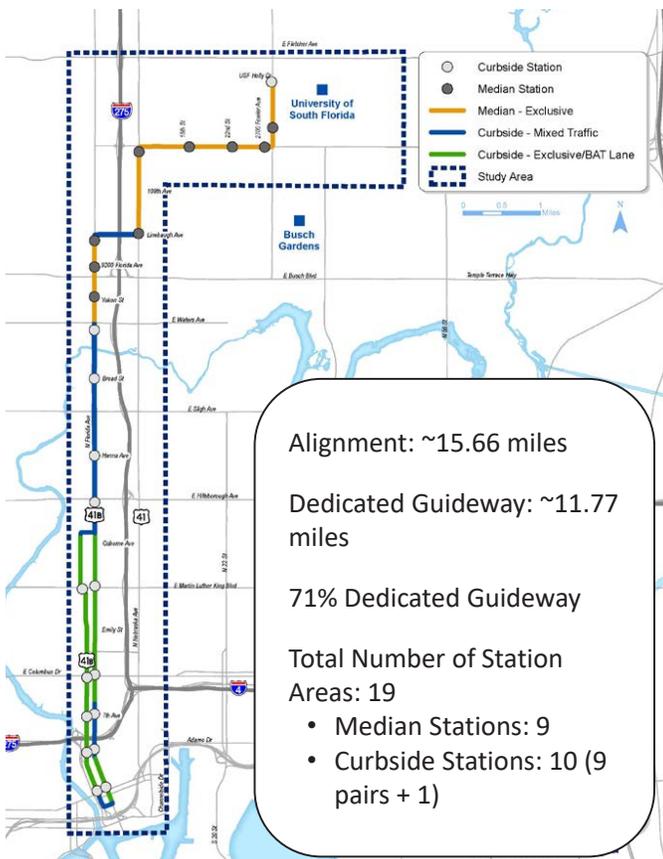
The study’s primary goal is to identify a corridor, using some combination of Florida, Nebraska, and/or Fowler Avenues, to connect Downtown Tampa to the USF Tampa Campus. This corridor would provide a dedicated transit lane for a majority (at least 50%) of its length to ensure reliable bus travel times. Additional goals of the study are to improve local, street-level bus service along Florida, Nebraska and/or Fowler Avenues. and adjacent corridors, as well as intersecting corridors between the USF Tampa Campus and Downtown Tampa. The study will focus on how the proposed new bus service can best meet the needs of existing bus riders, as well as those who may not have chosen to use this form of transportation before.

Figure 40. Recommended Streetcar Extension



HART TOD Pilot Project

Figure 41. HART Arterial BRT Alignment



connectivity and signalized crossing improvements, throughout the area for eventual connection to potential premium transit alignments.

The recommended alignment (**Figure 41**) was presented at the second public workshop held on March 12, 2020. It is approximately 15 miles long, extending from Downtown Tampa to the USF area. About 71 percent of the BRT corridor will operate in a dedicated guideway. Median-running, dedicated guideways will run along Bruce B. Downs Blvd, Fowler Avenue, Nebraska Avenue, and a northern portion of Florida Avenue. Curbside, mixed traffic guideways will run along Linebaugh Avenue, some middle and southern portions of Florida Avenue, Violet Street, and Jackson Street. Curbside dedicated/BAT guideways will run along Florida and Tampa Avenues in the Downtown and Tampa Heights areas. Nineteen total median and curbside station areas are proposed. A station concept is shown in **Figure 42**.

A number of potential non-motorized project opportunities that would improve pedestrian and bicycling conditions are also under consideration. The project is expected to begin Phase 2 in late 2020.

TBARTA Regional Rapid Transit

The Regional Rapid Transit (RRT) is a regional bus rapid transit plan with a route that connects Tampa Bay from Wesley Chapel to Downtown Tampa along I-275 (**Figure 43**). The goal of the project is to provide all-day, regional service that is quick, safe, reliable, and frequent. The communities where stops will be located include Wesley Chapel, the USF area, Downtown Tampa, Westshore, the Gateway area, and Downtown St. Petersburg. The project is currently in the PD&E study phase which will determine where the BRT route will run on dedicated lanes, where the physical stations will be located, and how the project will be financed.

During Phase I of the PD&E study, 21 station areas were considered for analysis. Seven of the 21 station locations resided in the HART TOD Pilot Project study area, and included Fletcher Avenue, Fowler Avenue/USF Area, Waters Avenue/Bird Street, Hillsborough Avenue, Dr. MLK Jr Blvd, Floribaska Avenue, and Downtown Tampa. Of these areas, the USF Area and the Downtown Tampa Area are identified as “must have” stations due to already being inter-modal stations and having strong roles in providing regional connections. However, after further analysis and discussions with stakeholders, only the Waters Avenue/ Bird Street station area was carried forward in addition to the inter-modal terminal areas.

Figure 42. HART Arterial BRT Station Concept

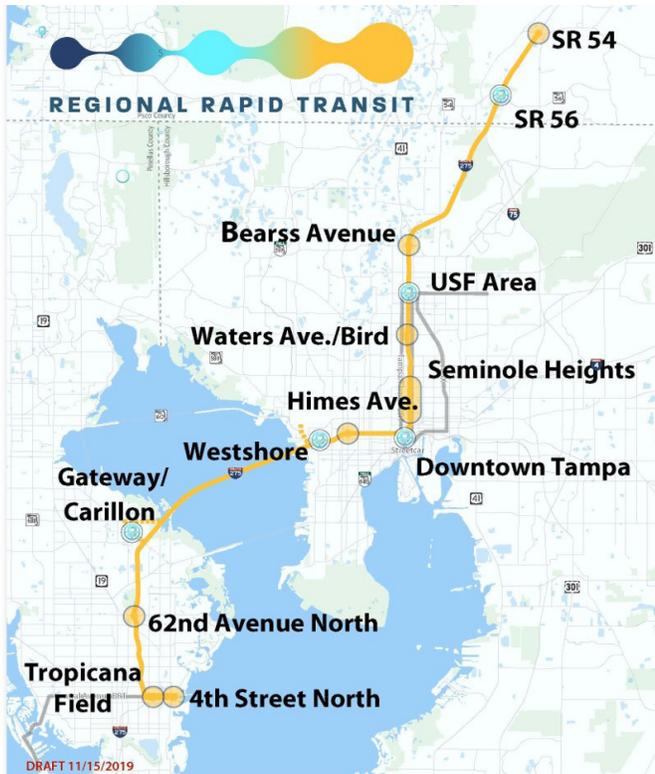


This Arterial BRT has three main objectives:

- Improve safety and transit operating conditions for bus routes on Florida, Nebraska and/or Fowler Avenues between USF and Downtown Tampa.
- Improve connectivity for east-west routes that cross the USF to Downtown Tampa corridor.
- Improve local transit access on Florida, Nebraska and/or Florida Avenues for communities between USF and Downtown Tampa, including bicycle and pedestrian



Figure 43. Proposed RRT Route



Heights Mobility Study

The Heights Mobility Study is an effort to improve safety and mobility in the Greater Seminole Heights/Tampa Heights area, along the Florida Avenue and Tampa Street/Highland Avenue corridor between Downtown Tampa and the Hillsborough River (Figure 44). Additionally, the Heights Mobility study team will work with the community to form a comprehensive vision for transportation within these neighborhoods, including other state roads and local streets in the area.

The collaborative nature of this effort between FDOT, the City of Tampa, HART, Hillsborough County, and the Hillsborough County MPO is an example of how multiple agencies are working together to improve safety and mobility throughout the community. The Study will build upon previous community planning efforts, coordinate with ongoing studies and planning efforts in the area, generate consensus with community members about the ultimate vision, and develop an action plan to move forward with improvements in a timely manner.

The main objectives of the Heights Mobility Study are as follows:

- Safety & Mobility Improvements
 - » Identify opportunities for short term safety and mobility enhancements that could be implemented right away.
- Public Engagement
 - » Develop a clear understanding of existing community character and identify mobility strategies to support existing community needs.
 - » Build a consensus around a Mission, Vision, and Goals for the Florida Avenue and Tampa Street corridor.
- Taking Action
 - » The Study will use the community's vision to develop a conceptual transportation plan for the corridor.
 - » Depending on the community vision, future Study phases may include engineering design and ultimately include a construction project.

In August 2019, the study team put forth an Action Plan for the Phase 1 short-term improvements based on feedback received through multiple public workshops, online surveys, community mapping tools, data and field reviews, and coordination with various agencies. Short-term projects identified and completed include:

- New traffic signals with pedestrian crossings on Florida Avenue at Harrison Street, Fortune Street, and Wilder Avenue.
- Road Diet/pavement marking changes on Violet Street between Florida Avenue and Tampa Street and on Highland Avenue between Dr Martin Luther King Jr Blvd and Violet Street, reducing the number of through lanes from 3 to 2.

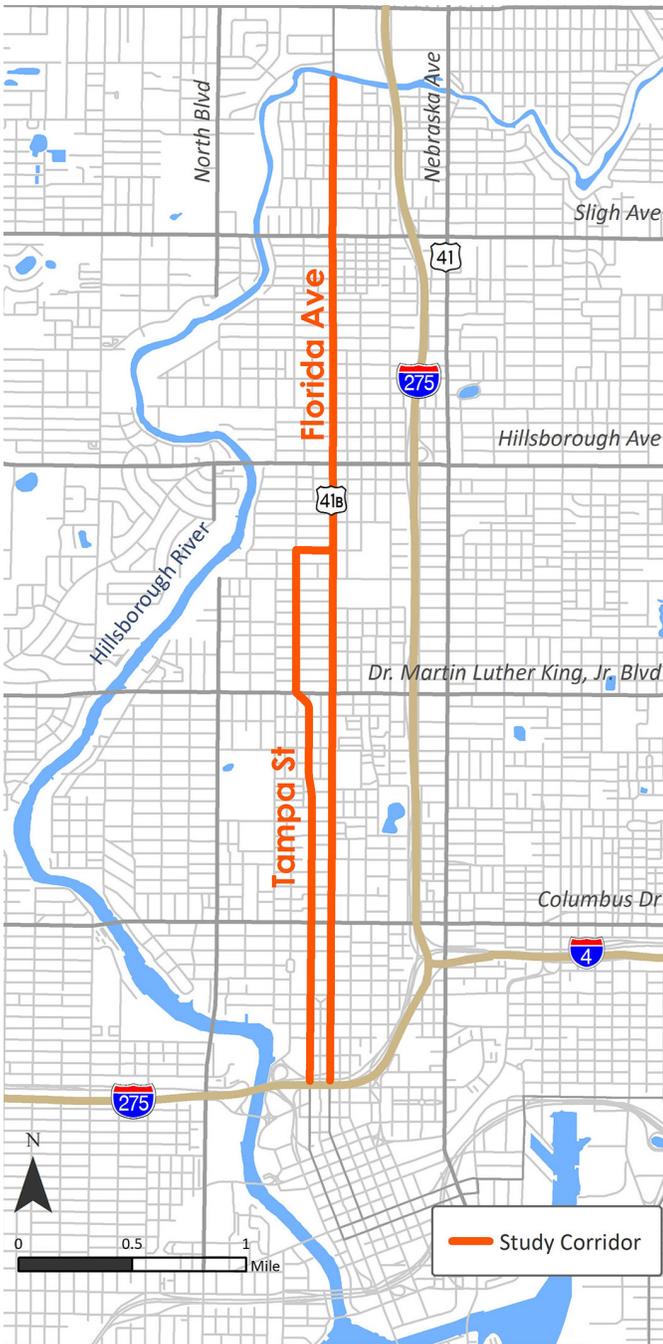
Tampa Walk Bike Plan

In 2009, the City updated its Comprehensive Plan to encourage growth within the City's three core "Business Centers" (Downtown, Westshore, and USF), along major transit corridors, and within designated "Mixed-Use Corridors and Villages." The plan considered projects from past transportation studies and planning efforts to identify and prioritize feasible bicycle and pedestrian projects and put a business plan in place to get those projects completed.

Projects to be prioritized by this effort fall into two groups:

- **Complete Streets Projects.** Projects which re-co an existing roadway facility to more fully incorporate bicycle, pedestrian, and transit modes. (e.g. converting

Map 44. Heights Mobility Study Corridor



a 4-lane undivided roadway to a 2-lane divided roadway with pedestrian refuge islands and bicycle lanes).

- **Stand-alone Projects.** Projects which do not require re-allocation of available automobile travel lanes (e.g. constructing sidewalks along a roadway from point A to point B or modifying lane widths to accommodate marked bicycle lanes).

The goal of the project was to identify and vet feasible “Complete Streets”, and lane or sidewalk projects. The plan was organized into five phases, lasting from 2011 to 2015, and include identified projects for construction. The projects relevant to this project corridor have been identified and described in the CIP section in this report.

Vision Zero Tampa

The City is developing a Vision Zero Action Plan to eliminate fatalities and severe injuries on roads in Tampa. The City of Tampa is dedicated to achieving Vision Zero by working together collaboratively across all departments and with other partners to enhance engineering, enforcement, and education efforts. Mayor Castor’s Transportation Advisory Team provided the following recommendations to accelerate the implementation of Vision Zero as part of the Transforming Tampa’s Tomorrow (T3) initiative:

- Develop a Citywide Vision Zero Action Plan;
- Implement Safety Projects on High Priority Corridors;
- Deploy Speed Management Strategies to Improve Safety Outcomes;
- Expand the City’s network of Trails, Greenways and Safe Crosswalks to connect them;
- Use Tactical Urbanism and community-focused activities that activate public spaces and create more awareness of vision zero and safety themes; and
- Continue proactive traffic enforcement efforts, focused on the most dangerous roads in Tampa.

Vision Zero Hillsborough

The Vision Zero Action Plan was collaboratively developed by the MPO Policy Committee, with members representing Tampa City Council, the Hillsborough County Commission, HART Board, and others in 2016 and 2017. Resolutions passed by government agencies and businesses commit these organizations to incorporating the plan into their operations. The plan has four Action Tracks:

- **Paint Saves Lives.** Pop-up design interventions, complete streets, cycle tracks and other projects improve safety, but often require a large investment and a long time to accomplish. To start saving lives in the short term with limited public dollars calls for creativity. This track set out to improve safety incrementally by using data to



pinpoint locations for low-cost actions that can be taken in one to two years.

- **One Message, Many Voices Outreach & Messaging.** Vision Zero's success depends on communicating its core messages in ways that will resonate. This action track focused on identifying key audiences for the initiative, choosing the most effective mediums to reach them and tailoring Vision Zero's messages in compelling ways for each audience.
- **Consistent and Fair Enforcement.** Safe road behavior is everyone's responsibility, whether you walk, bike or drive. Preventing dangerous behaviors isn't solely the responsibility of law enforcement. This action track focused on ways to reduce dangerous behaviors by all road users. It also considered methods beyond policing to inhibit dangerous behaviors to include engineering and education.
- **The Future Will Not be Like the Past Flexible Design Standards.** Reaching zero road deaths means changing the culture that contributes to the problem. That includes changing the way professionals in the private and public sectors approach driving, biking and walking. This track focuses on ways to avoid perpetuating the problems in our built environment as new roads and developments are built.

Additionally, the Vision Zero Action Plan identified severe crash corridors for four categories including All Modes, Vulnerable Users, Aggressive Driving, and Dark Lighting Conditions. The top 20 high crash corridors for each of these categories was identified and several of the corridors are located within the HART BRT route.

The following lists the County's top 20 corridors with the most severe crashes per mile.

- **All Modes**

- » #3. Hillsborough Ave from Longboat Blvd to Florida Ave (8.87 miles) 176 crashes (19.8 crashes per mile); Daily VMT: 528,719
- » #4. Fletcher Ave from Armenia Ave to 50th St (5.09 miles) 100 crashes (19.6 crashes per mile)*; Daily VMT: 196,990
- » #8. Bruce B. Downs from Fowler Ave to Bearss Ave (1.77 miles) 32 crashes (18.1 crashes per mile); Daily VMT: 304,083
- » #10. 15th St from Fowler Ave to Fletcher Ave (1.02 miles) 18 crashes (17.6 crashes per mile); Daily VMT: 10,458
- » #20. Florida Ave from Waters Ave to Linebaugh Ave (1.01 miles) 15 crashes (14.9 crashes per mile) Daily VMT: 27,270

- **Vulnerable Users (Bike/Ped)**

- » #1. Florida Ave from Tyler St to Kay St (0.33 miles) 3 crashes (9.09 crashes per mile)
- » #2. 15th St from Fowler Ave to Fletcher Ave (1.02 miles) 8 crashes (7.84 crashes per mile)
- » #5. Nebraska Ave from Hillsborough Ave to Fletcher Ave (4.96 miles) 23 crashes (4.64 crashes per mile)
- » #6. Bruce B. Downs Blvd from Fowler Ave to Bearss Ave (1.77 miles) 8 crashes (4.52 crashes per mile)
- » #7. Fletcher Ave from Armenia Ave to 50th St (5.09 miles) 23 crashes (4.52 crashes per mile)
- » #9. Hillsborough Ave from Longboat Blvd to US 301 (14.73 miles) 61 crashes (4.14 crashes per mile)
- » #16. Waters Ave from Armenia Ave to Nebraska Ave (2.02 miles) 6 crashes (2.97 crashes per mile)

- **Aggressive Drivers**

- » 5. Florida Ave from Waters Ave to Linebaugh Ave (1.01 miles) 10 crashes (9.9 crashes per mile)
- » 19. Fletcher Ave from Armenia Ave to 50th St (5.09 miles) 36 crashes (7.07 crashes per mile)

- **Dark Lighting**

- » #7. 30th Street/Bruce B. Downs Blvd from Fowler Avenue to Bearss Avenue (1.77 miles) 5 crashes (2.82 crashes per mile)
- » #11. Hillsborough Avenue from Longboat Blvd to U.S. 301 (14.73 miles) 27 crashes (1.83 crashes per mile)
- » #17. Fletcher Avenue from Armenia Avenue to 50th Street (5.09 miles) 7 crashes (1.38 crashes per mile)

In addition to the four categories discussed, the Vision Zero Action Plan looked at the high crash corridors where school age students was a factor. Again, several of these corridors are located within or intersect with the HART BRT corridor. This section highlights them along with key findings from the Vision Zero Action Plan:

- » #3. Hillsborough Ave from Longboat Blvd to Florida Ave (8.87 miles) 176 crashes (19.8 crashes per mile).
- » #4. Fletcher Ave from Armenia Ave to 50th St (5.09 miles) 100 crashes (19.6 crashes per mile)*
- » #8. Bruce B. Downs from Fowler Ave to Bearss Ave (1.77 miles) 32 crashes (18.1 crashes per mile)
- » #10. 15th St from Fowler Ave to Fletcher Ave (1.02 miles) 18 crashes (17.6 crashes per mile)
- » #16. I-275 from Howard Frankland Bridge to Busch Blvd (10.86 miles) 164 crashes (15.1 crashes per mile)
- » #20. Florida Ave from Waters Ave to Linebaugh Ave (1.01 miles) 15 crashes (14.9 crashes per mile)

7.5. ZONING REGULATIONS & TOD COMPATIBILITY

Zoning regulations establish the framework for development in a given area. This section includes an assessment of zoning ordinances that support increased development density in the study area, as well as enhanced transit-oriented character of development and pedestrian access. Existing zoning ordinances are reviewed to assess allowable densities and types of uses, and how these allowances are compatible with plans for transit oriented development.

The study area comprises Hillsborough County and City of Tampa zoning jurisdictions. A zoning atlas shows the various zoning districts in the study area (**Map 45**). Each zoning district is tied to a series of regulations that govern the buildings maximum envelope and relationship to the street. A list of allowed uses is often part of the zoning regulations. Other regulations found within zoning are typically setbacks, height, lot coverage, and parking ratios and configurations. A zoning overview table is included at the end of this section.

TOD-COMPATIBILITY PARAMETERS

The study team established a TOD compatibility zoning index that uses zoning district definitions to establish a favorability rating based on the parameters listed below. Each one of these parameters is assessed on its relationship to transit-oriented development outcomes.

- **Density.** When examining transit-supportive densities in different metropolitan contexts and for different headways (length of time between transit vehicles) and different technologies (streetcar vs. bus), certain thresholds emerge. Below a density of 10 dwelling units per acre in the vicinity of a transit stop, it is difficult to support frequent bus service without a subsidy. It is difficult to support frequent streetcar or light rail service without great subsidy if densities fall below 30 dwelling units per acre. Ideally, maximum densities within the pedestrian shed would be well above these minimum thresholds.
- **Form-Based Code.** A form-based code differs from a conventional zoning code in that urban form, rather than use, is the organizing principle of the code. Conventional zoning codes tend to segregate uses and create monocultures, which result in the necessity to drive to satisfy most daily needs. They also rigorously segregate building types so that households of differing socio-economic levels are segregated by housing type. form-based codes encourage a more liberal and market-based mixing of uses and building types while requiring a higher

quality public realm and building frontages that shape streets and open spaces.

- **Floor Area Ratio (FAR).** Floor Area Ratio is the ratio between the maximum allowable built square footage to the area of the parcel. It is an abstract ratio that is common to conventional zoning codes, but rare or non-existent in form-based codes. In the best scenario, FAR would not exist within a zoning regulation. If it does exist, FAR that exceeds 1 allows for a healthy usage of urban land outside of the Downtown Core. When FAR falls below 1, it becomes difficult to redevelop because of the inability to construct multi-story buildings, depending on the other regulations that accompany FAR. When maximum lot coverage is less than 100% and coincides with the FAR coefficient, this presents an insurmountable obstacle to redevelopment, as it becomes impossible to construct or finance more than one-story buildings of a single use. This condition may undermine transit ridership and ought to be considered a worst case scenario.
- **Parking Ratio.** In the most advanced form-based codes, there are no minimum parking ratios. Some even have maximum parking ratios. In the presence of an existing or planned transit line, most form-based codes allow properties to be exempt from providing off-street parking. Most conventional zoning codes, however, have burdensome parking ratios that add cost or physical constraints to the redevelopment of smaller parcels upon which it is difficult to satisfy the parking ratios. The next best condition, if it is not possible to eliminate parking ratios, is to have in-lieu of parking fees, shared parking reduction tables, parking reduction coefficient due to transit, or some other mechanism to reduce the burden of providing off-street parking on each parcel.
- **Front Setback.** In most form-based codes, the front setback is reduced to create a more direct relationship between the building's front facade and the back of the sidewalk. This is because where deep front setbacks prevail, pedestrians quickly lose interest when building facades are too distant from view, or even worse, when they are located behind surface parking lots. Best practice calls for a build-to line or BTL, which brings buildings up to a disciplined line that legibly shapes the public realm. As buildings are allowed to be located more distant from the sidewalk, then the continuity and quality of the urban realm is diminished.
- **Minimum Frontage Buildout.** Minimum Frontage Buildout is a key component of many form-based codes. This metric, combined with maximum front setback or BTL ensures that there are continuous streetwalls. The intent is to minimize the amount of gaps in buildings so that streets are lined with interesting and varied facades



rather than plagued by voids and parking lots, which can discourage pedestrians from wanting to walk in the district.

- **Minimum Lot Width.** Minimum lot widths may make certain lots unbuildable, especially if the platted lot width is less than the minimum dimension stipulated in the zoning. Overtime, this can discourage developers from seeking to create infill housing or mixed-use development on already platted lots.
- **Minimum Lot Area.** Minimum lot area may make certain lots unbuildable, especially if the platted lot area is less than the minimum dimension stipulated in the zoning. Overtime, this can discourage developers from seeking to create infill housing or mixed-use development on already platted lots.
- **Ground-Level Retail.** Ground level retail ought to be allowed in corridor-facing parcels. When design standards accompany it, glazing and transparency are ensured. These allow for a clear view of merchandise, a minimum amount of natural surveillance so that building occupants may observe events and people on the sidewalk, and for a minimum amount of visual interest for the pedestrian to encourage walking. Blank walls at the groundfloor has a deadening effect upon pedestrian safety, comfort, and visual interest.
- **Maximum Height.** For most parcels in the pedestrian shed of a transit stop, the ability to redevelop parcels as multi-story buildings is key to ensure adequate densities, a mixture of uses, and adequate spatial enclosure for streets and squares. Generally, the ability to develop at three stories or greater allows for greater flexibility and a variety of unit types and configurations. Densely occupied upper floors also assists in the viability of groundfloor retail by providing a greater number of potential customers within walking distance of retail spaces.

TOD-COMPATIBILITY INDEX

Table 11 shows rough thresholds and criteria by which zoning districts were analyzed for their ability to encourage or thwart the creation of TOD. The following pages show how various parts of the corridor were judged, based on these TOD-friendly criteria. These criteria were used to generate a heat map, which informs where zoning regulations are supportive of TOD. The final scores were based on density (25 points), form-based codes (10 points), floor area ratios (10 points), mixed-use allowed (25 points), and height regulations (5 points), with maximum scores in parenthesis. Each of these point values are multiplied by a coefficient of 0, 0.5 or 1 based on how well they fulfill the criteria. Finally, each zoning district received a sum total of points, and a corresponding color—red = poor, yellow = mediocre, and green = good. The colors were then applied to **Map 46** on the following page.

7.6. TOD COMPATIBILITY ZONING INDEX RESULTS

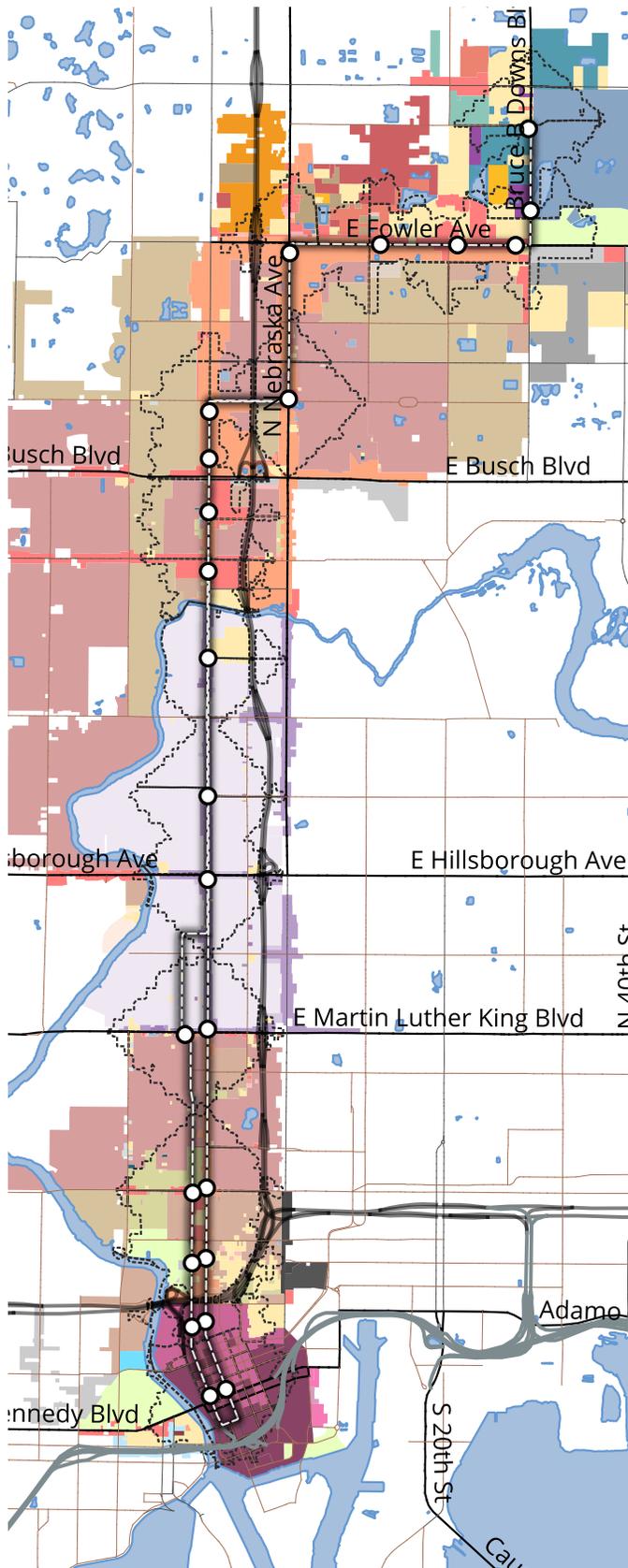
Maps 46-51 show the varying consequences of zoning regulations upon the walkability throughout the corridor. Each zoning district and all of its component regulations and metrics were examined. Using criteria for walkability, a color was assigned to each regulation's metric: green for good, yellow for mediocre, and red for poor. Then each zoning districts was examined to see which color or colors predominated, before assigning the overall zoning district a color. This color would illuminate which zoning districts are more able to deliver walkable and transit-ready urban fabric than others.

Downtown

For the most part, Downtown already retains TOD-compatible zoning regulations such as market-based parking and design flexibility for accommodating a diversity of uses. Public space design standards also ensure that new development projects contribute to the quality of the urban realm. These criteria mean that zoning in Downtown is supportive of TOD.

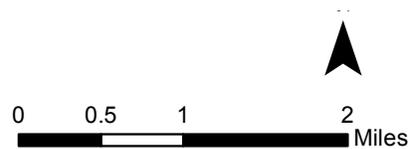
Tampa Heights

Tampa Heights is saddled with regulations that make it difficult to develop walkable neighborhoods. With major exceptions south of Columbus Drive, the majority of land for residential units in this area is in the form of detached single-family residential. Zoning districts in this area should balance the historic character of this area with development opportunities adjacent to and within walking distance of the proposed BRT alignment. The zoning in this area may restrict the development of TOD.



Map 45. Zoning Districts

Zoning Districts	
BPO	RS-50
CBD-1	RS-60
CBD-2	RSC-6
CD-2	RSC-9
CD-3	SH-CG
CG	SH-CI
CI	SH-CN
CN	SH-PD
IG	SH-RM
IH	SH-RO
OP	SH-RS
OP-1	SH-RS-A
OR	SPI-UC-1
PD	SPI-UC-2
PD-A	UC
RDC-12	UCA-NHO
RM-12	YC-2
RM-16	YC-5
RM-18	
RM-24	
RM-75	
RMC-12	
RMC-16	
RMC-20	
RO	
RO-1	
RS-100	



Source: City of Tampa, Hillsborough County



Seminole Heights

The Seminole Heights area allows design flexibility by eliminating FAR maximums, permitting market-based parking, and enforcing public design standards. This allows for TOD-friendly uses throughout this segment of the corridor. The zoning in this area has the potential to achieve TOD, with certain upgrades and incentives.

North Florida/Nebraska

The commercial zoning in this area is predominantly limited by FAR maximums and parking minimums. Exceptions to parking requirements are not allowed in this area. The density maximums impair walkability, a key metric of TOD-friendliness. Finally, commercial intensive zoning permits heavy commercial uses and services, characteristically

incompatible with residential uses, without compensating these effects with access control or public design standards.

Fowler/USF

The auto-oriented regional center is dominated by big box stores, free-standing fast food, and buildings set behind multiple rows of parking. In addition to these development conditions, roads are wide and result in an environment that is not pleasant for walking, cycling, and getting around with a personal mobility device. The absence of mixed-use zoning will need to be addressed to realize the full potential for TOD in this area. Despite these conditions, many opportunities are available to transform frontage standards of shopping and higher-education complexes.

Table 11. TOD Compatibility Zoning Index

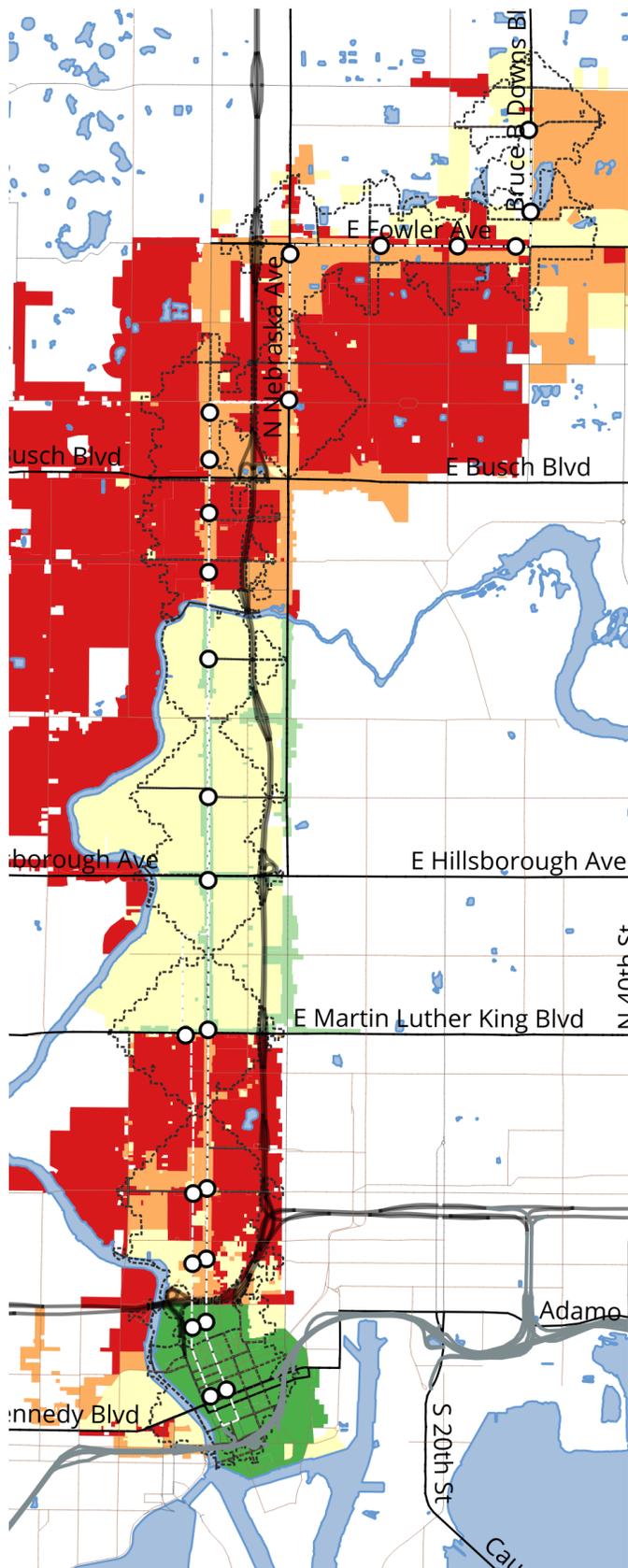
CRITERIA	POOR (0)	MEDIOCRE (0.5)	GOOD (1)
Density (DU/AC) (max 25 points)	1	>10 DUA (non-fronting)	>30 DUA (fronting)
Form-Based Code (FBC) (max 10 points)	No	-	Yes
Floor Area Ratio (FAR) (max 10 points)	FAR < 1 or less than maximum lot coverage percent	FAR > 1 or greater than maximum lot coverage percent	No FAR
Parking Ratio (max 25 points)	Parking Reqs.	Shared Parking Reductions or In-Lieu Fees	No Parking Minimum
Mixed-Use Allowed (max 25 points)	Prohibited	Allowed	Allowed with Design Standards
Maximum Height (max 5 points)	< 35 feet	35-45 feet	> 45 feet
Streetwall*	N/A	Minimum of 50%	Distinguishes between A and B Streets and A has a 70% minimum
Front Setback*	≥ 12 feet	< 12 feet	Build to Line
Minimum Lot Width**	Greater than Platted Lot Width	Less than Platted Low Width	N/A
Minimum Lot Area**	Greater than Platted Lot Area	Less than Platted Lot Area	N/A



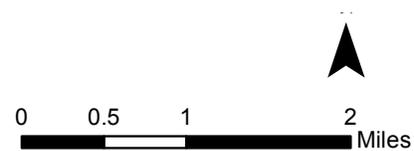
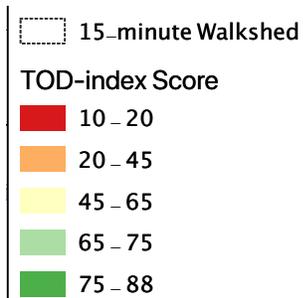
* Streetwall and Front Setback were not scored because they represent the principal metrics of form-based codes.

**Minimum Lot Width and Minimum Lot Area were not scored because they only present a problem when paired with overly restrictive building types or permitted use charts

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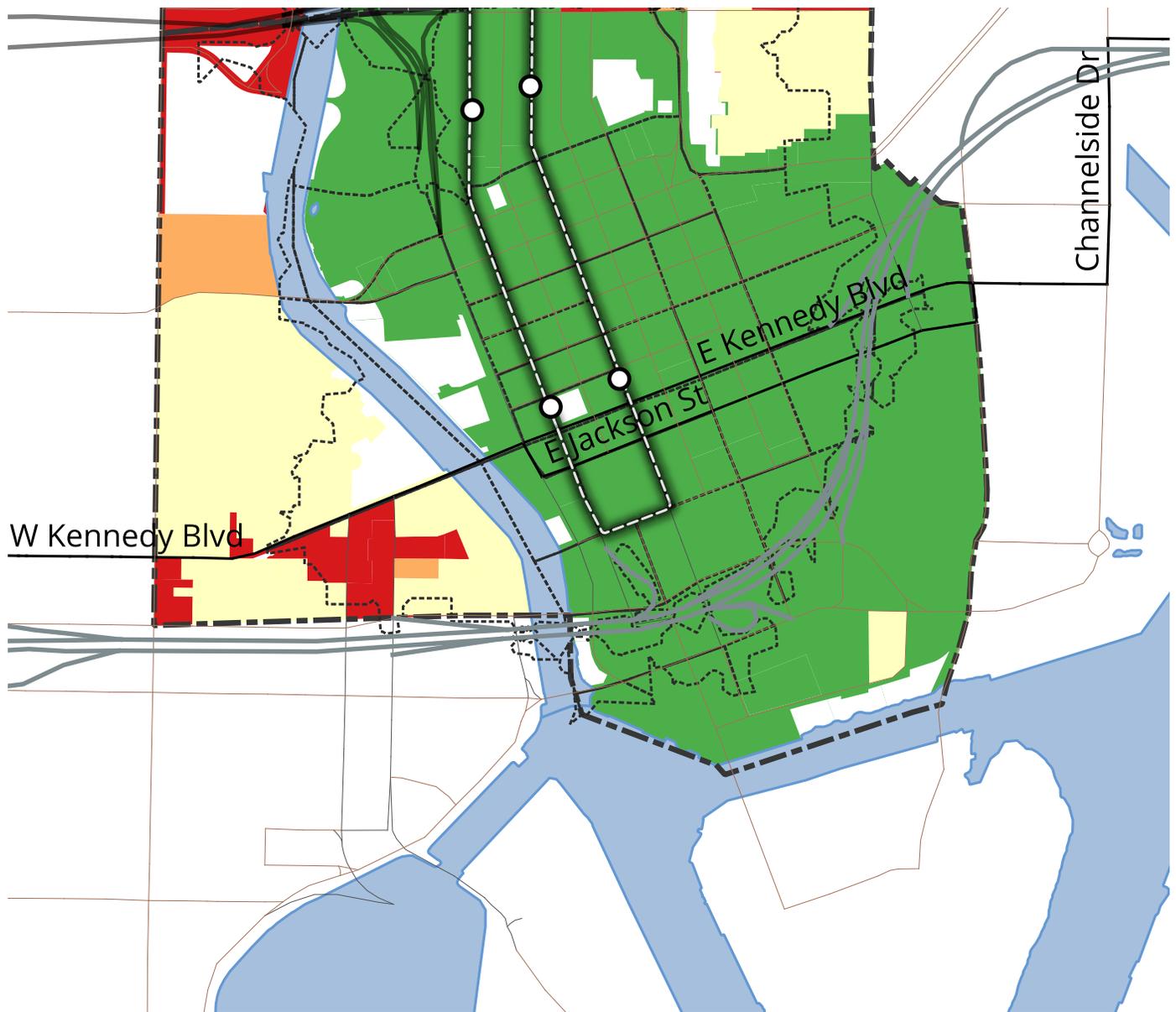
Map 46. TOD Compatibility Zoning Index



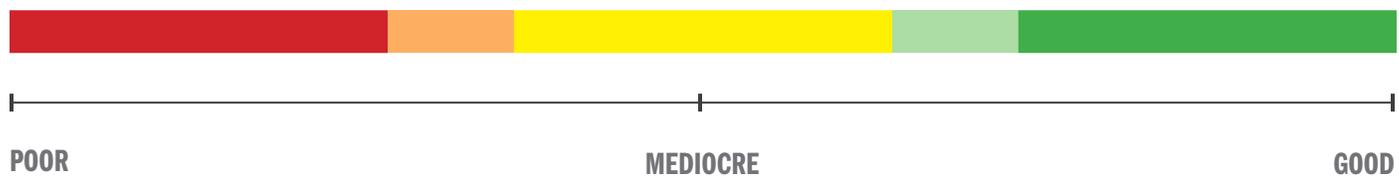
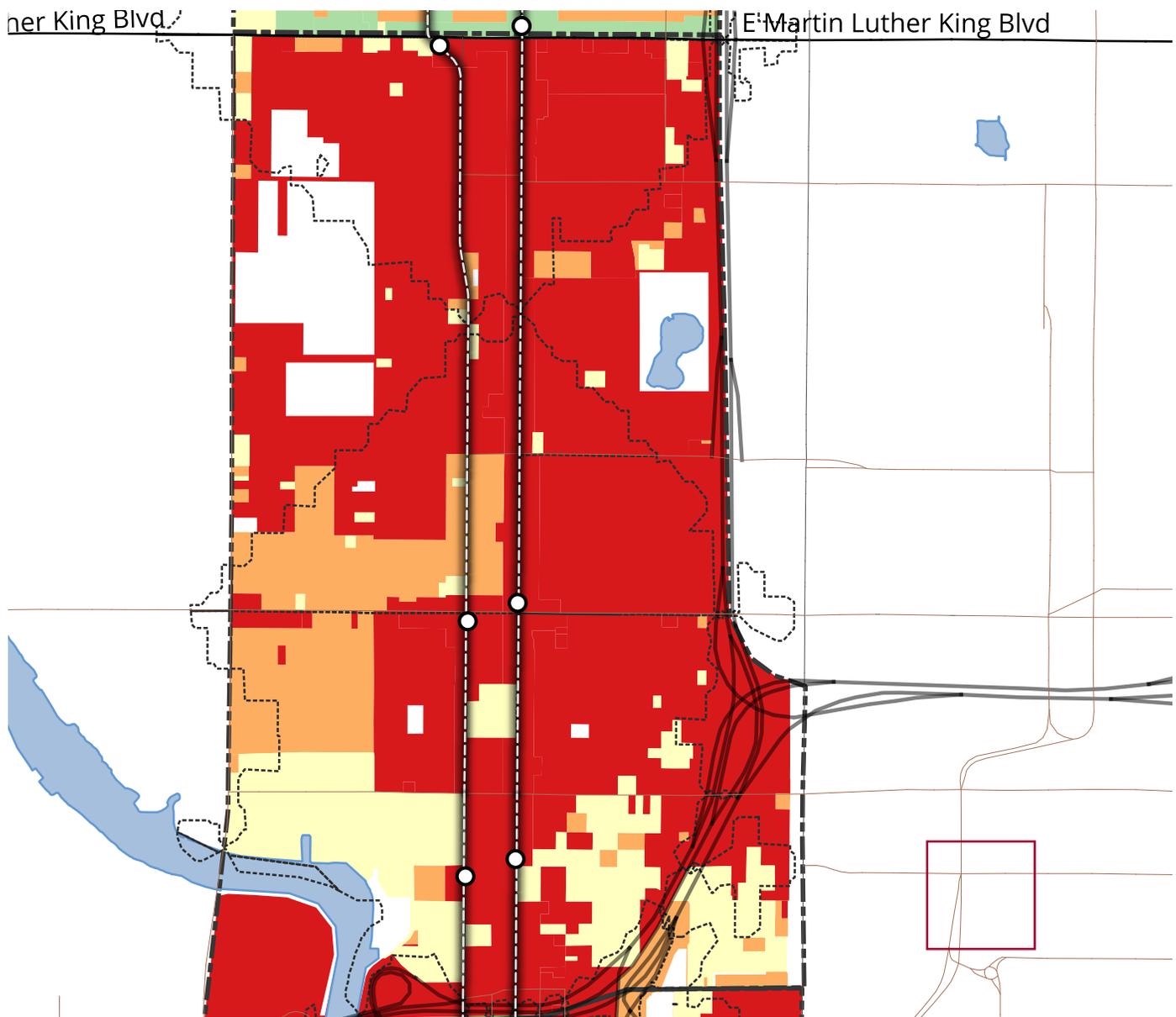
Source: City of Tampa, Hillsborough County



Map 47. Downtown

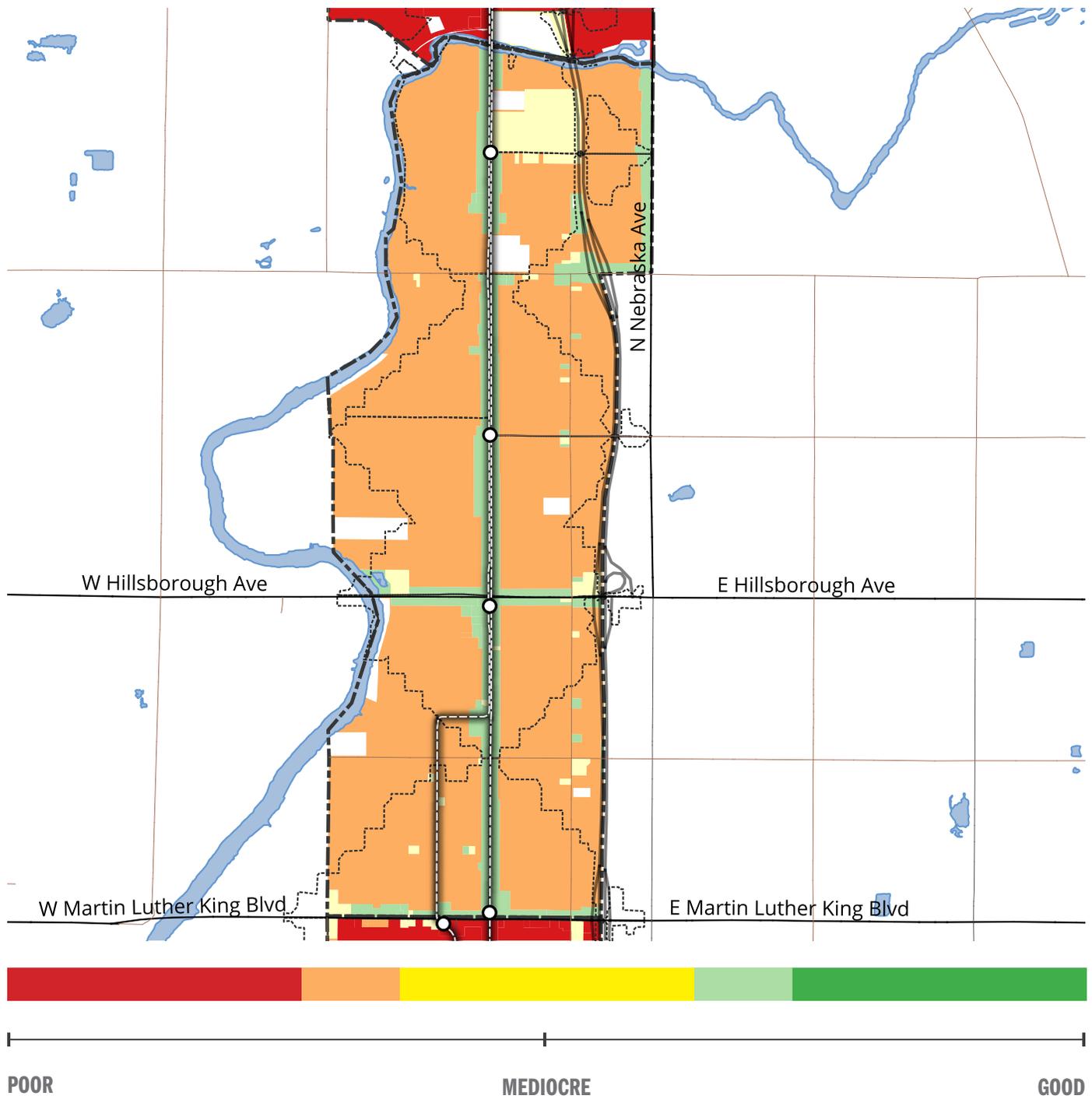


Map 48. Tampa Heights

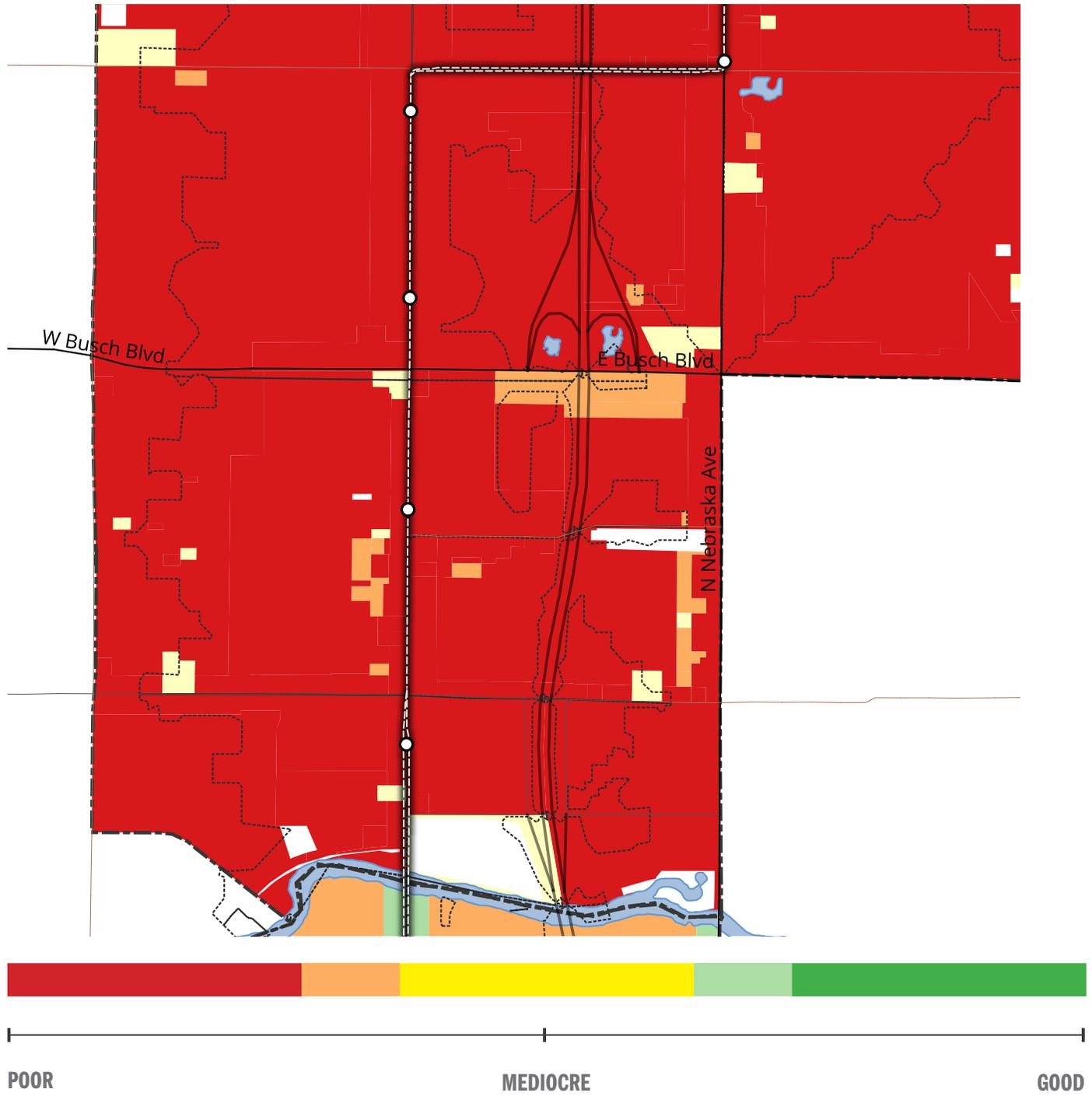




Map 49. Seminole Heights

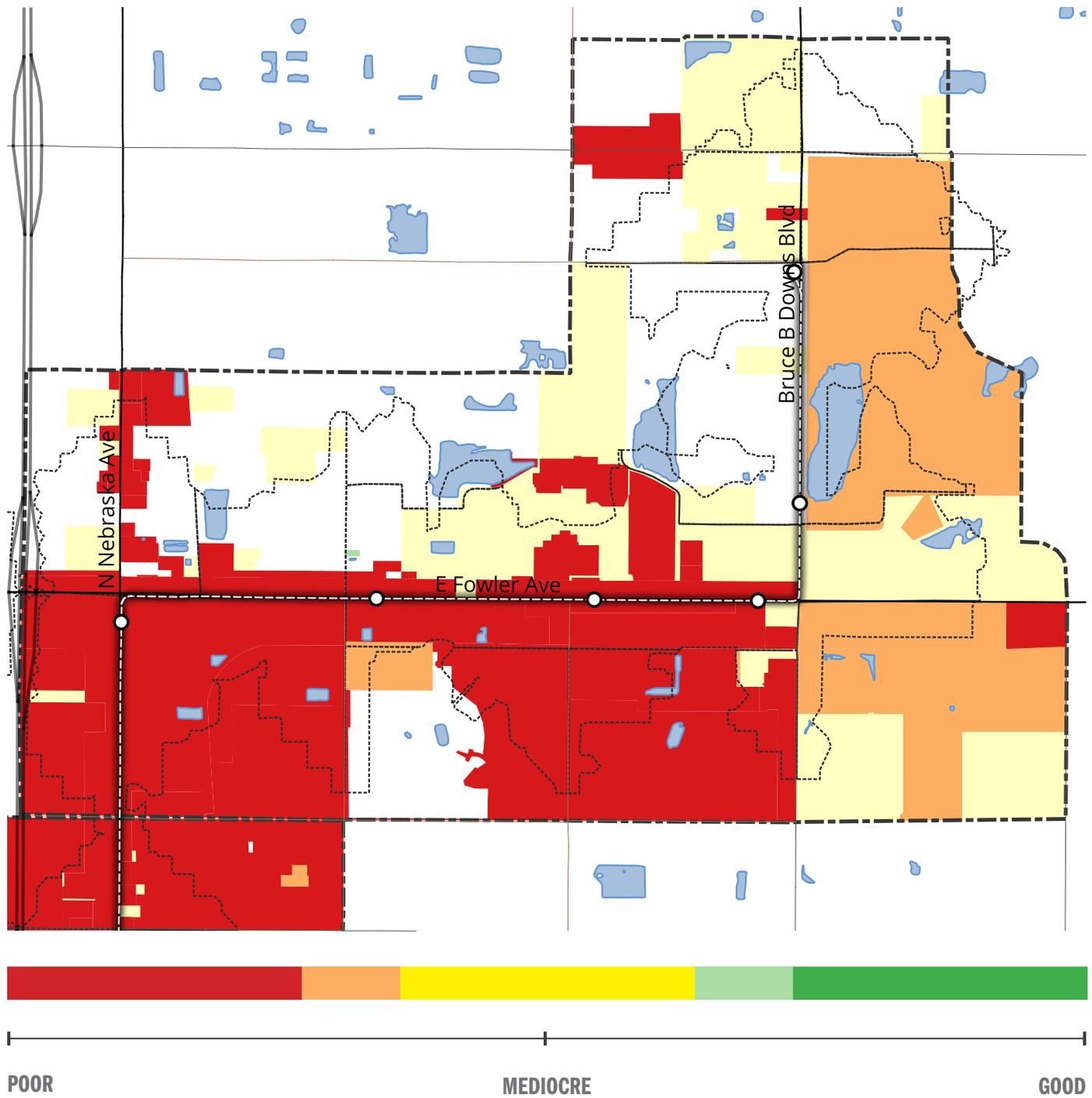


Map 50. North Florida/Nebraska





Map 51. Fowler/USF



7.7. CORRIDOR OVERVIEW ZONING CHART

Table 12 provides a summary of the various zoning districts that constitute the TOD Pilot Project study area. The most important metrics that govern a site’s development have been extracted and presented to ascertain what the possible building envelope, massing, uses, and parking configuration are for a site. This table also allows one to compare zoning districts in the future and to decide which ones ought to inform the creation of new form-based codes or zoning districts along the corridor to create transit-oriented development.

Table 12. Zoning—Corridor Overview

	CITY OF TAMPA				
	Downtown Tampa		Channel District		Commercial - General
	CBD-1	CBD-2	CD-2	CD-3	CG
Within Pedestrian Shed of Transit Stop?	Yes	Yes	no	no	yes
Form-Based Code?	Yes	Yes	Yes	Yes	No
Public Realm Standards?	Yes	Yes	Yes	Yes	no
Architecture Standards?			no	no	no
Height	Airport Height Zoning Map	Airport Height Zoning Map	175'	175'	45'
Front Setback	BTZ 0'-6'	BTZ 0'-6'	5'-15' (street varies)	5'-15' (street varies)	10'
Rear Setback (Interior Lot/Corner Lot)	0', 3' from alley	0', 3' from alley		0'-10'	10'
Side Setback	0'	0'	0'	0'	10'
Streetwall % A Street	75%, 85% min	75%, 85% min			NA
Streetwall % B Street	30%, 50%,60% min	30%, 50%,60% min			NA
Streetwall % C Street	20%,25% min	20%,25% min			NA
Minimum Lot Width					75'
Minimum Lot Area (ft2)	NA	NA	NA	NA	10,000 sq ft
Maximum Impervious	100%	100%	NA	NA	NA
Maximum building coverage	90%, some may be on podium	90%, some may be on podium			
Maximum FAR	NA	NA	3.5	3.5	0.35
Maximum density (du/acre)	NA	NA	NA	NA	30
Parking ratios	Table 184	Table 184	Required, in lieu fees available, table 19-3	Required, parking fund available, table 19-3	
Parking configuration	screened by landscape	screened by landscape	Art.VI.Div.3	Art.VI.Div.3	
Market-based parking?	Reductions allowed	Reductions allowed	Reductions allowed	Reductions allowed	No
Mixed Use Allowed	Yes	Yes	Yes	Yes	No



Table 12. Zoning—Corridor Overview (continued)

CITY OF TAMPA					
	Commercial - Intensive	Commercial - Neighborhood	Industrial General	Industrial Heavy	Office Professional
	CI	CN	IG	IH	OP
Within Pedestrian Shed of Transit Stop?	yes	yes	yes	yes	yes
Form-Based Code?	No	No	No	No	No
Public Realm Standards?	no	no	no	no	no
Architecture Standards?	no	Yes. 27-164	no	NA	no
Height	45'	35'	60'	NA	60'
Front Setback	10' / 28'	20'	10'	10'	25'
Rear Setback (Interior Lot/Corner Lot)	0'	10'	0'	0'	20'
Side Setback	0'	10'	0'	0'	10'
Streetwall % A Street	NA	NA	NA	NA	NA
Streetwall % B Street	NA	NA	NA	NA	NA
Streetwall % C Street	NA	NA	NA	NA	NA
Minimum Lot Width	100'	60'	50'	50'	60'
Minimum Lot Area (ft2)	10,000 sq ft	5,000 sq ft	5,000 sq ft	5,000 sq ft	10,000 sq ft
Maximum Impervious	NA	NA	NA	NA	NA
Maximum building coverage					
Maximum FAR	1.5	0.35	0.75	0.75	1.5
Maximum density (du/acre)	30	30	NA	NA	24
Parking ratios					
Parking configuration					
Market-based parking?	No	Yes	No	No	No
Mixed Use Allowed	No	No	No	No	No

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Table 12. Zoning—Corridor Overview (continued)

CITY OF TAMPA						
Office Professional	Planned Development	Planned Development Alt.	Residential Multi-family			
OP-1	PD	PD-A	RM-12	RM-16	RM-24	RM-75
yes	yes	yes	yes	yes	yes	yes
No			No	No	No	No
no			no	no	no	no
no			no	NA	NA	no
200'			35'	35'	60'	NA
20'			25'	25'	25'	25'
20'			15'/15'	15'/15'	20'	20'
10'			7'	7'	7'	7'
NA	NA	NA	NA	NA	NA	NA
NA	NA	NA	NA	NA	NA	NA
NA	NA	NA	NA	NA	NA	NA
60'	NA	NA	50'	50'	50'	50'
10,000 sq ft	NA	NA	5,000 sq ft	5,000 sq ft	5,000 sq ft	5,000 sq ft
NA	NA	NA	NA	NA	NA	NA
3.5						
50	NA	NA	12	16	24	75
			Table 1, Sec. 27-283.7			
No	No	No	No	No	No	No
No	See comp plan, adjacent use compatibility	See comp plan, adjacent use compatibility				



Table 12. Zoning—Corridor Overview (continued)

CITY OF TAMPA					
	Residential Office		Residential Single-Family		
	RO	RO-1	RS-50	RS-60	RS-100
Within Pedestrian Shed of Transit Stop?	yes	yes	yes	yes	no
Form-Based Code?	No	No	No	No	No
Public Realm Standards?	no	no	no	no	no
Architecture Standards?	Yes. 27-164	Yes. 27-164	27-159	27-159	NA
Height	35'	35'	35'	35'	35'
Front Setback	25'	25'	20'	25'	25'
Rear Setback (Interior Lot/Corner Lot)	20'	20'	20'/20'	20'/20'	20'/12'
Side Setback	7'	7'	7'	7'	7'
Streetwall % A Street	NA	NA	NA	NA	NA
Streetwall % B Street	NA	NA	NA	NA	NA
Streetwall % C Street	NA	NA	NA	NA	NA
Minimum Lot Width	50'	50'	50'	60'	100'
Minimum Lot Area (ft2)	5,000 sq ft	5,000 sq ft	5,000 sq ft	6,000 sq ft	10,000 sq ft
Maximum Impervious	NA	NA	NA	NA	NA
Maximum building coverage					
Maximum FAR	0.35	0.5	NA	NA	NA
Maximum density (du/acre)	8.7	16	8.7	7.3	4.4
Parking ratios					
Parking configuration					
Market-based parking?	Yes	Yes	No	No	No
Mixed Use Allowed					

Table 12. Zoning—Corridor Overview (continued)

CITY OF TAMPA						
SEMINOLE HEIGHTS SEMINOLE HEIGHTS						
SH-RS	SH-RM	SH-RO	SH-CN	SH-PD	SH-CI	SH-CG
RS-A ?	yes	yes	yes	yes	yes	yes
Yes	Yes	Yes	Yes	Yes	Yes	Yes
yes	yes	yes	yes	yes	yes	yes
yes	yes	yes	yes		yes, for residential	yes, for residential
2 stories/35'	3 stories/38'	3 stories/38'	3 stories/45'		4 stories/55'	3 stories/45'
BTL: average adjacent	BTL: average adjacent	BTL: average adjacent	BTL: 10'		BTL: 10'	BTL: 10'
20'	20'	20'	15'		15'	15'
7'	0', average adjacent	0', average adjacent	0'		0'	0'
MAP SH-25.1	25% front	MAP SH-25.1	35% front		50% front	50% front
MAP SH-25.1	10% side	MAP SH-25.1	15% side		25% side	25% side
NA	NA	NA	NA		NA	NA
50'	50'	50'	60'		75'	75'
5,000 sq ft	see comp plan	5,000 sq ft	6,000 sq ft	see comp plan	7,500 sq ft	7,500 sq ft
NA	NA	NA	NA	NA	NA	NA
8.7	see comp plan	17.5	see comp plan	see comp plan	see comp plan	see comp plan
Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2
Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2	Table 211.2
Yes	Yes	Yes	Yes	Yes	Yes	Yes
No						



Table 12. Zoning—Corridor Overview (continued)

	CITY OF TAMPA	HILLSBOROUGH COUNTY			
		Business - Professional Office	Commercial - General	Commercial - Intensive	Commercial - Neighborhood
	UC	BPO	CG	CI	CN
Within Pedestrian Shed of Transit Stop?	yes	yes	yes	yes	yes
Form-Based Code?	No	No	No	No	No
Public Realm Standards?	no	No	No	No	No
Architecture Standards?		No	No	No	No
Height	100'	50'	50'	50'	35'
Front Setback	50'	30'	30'	30'	30'
Rear Setback (Interior Lot/Corner Lot)	50'	buffer by use	buffer by use	buffer by use	buffer by use
Side Setback	25'	buffer by use	buffer by use	buffer by use	buffer by use
Streetwall % A Street		NA	NA	NA	NA
Streetwall % B Street		NA	NA	NA	NA
Streetwall % C Street		NA	NA	NA	NA
Minimum Lot Width	100'	70'	75'	100'	70'
Minimum Lot Area (ft ²)	43560	7000	10000	20000	7000
Maximum Impervious	NA	60%	70%	75%	60%
Maximum building coverage		20%	27%	30%	20%
Maximum FAR	0.25	0.2	0.27	0.3	0.2
Maximum density (du/acre)	NA	NA	NA	NA	NA
Parking ratios					
Parking configuration					
Market-based parking?	No				
Mixed Use Allowed					

Table 12. Zoning—Corridor Overview (continued)

HILLSBOROUGH COUNTY					
Office Residential	Planned Development	Residential - Duplex Conventional	Residential - Multi-Family Conventional		
OR	PD	RDC-12	RMC-12	RMC-16	RMC-20
yes	yes	yes	yes	yes	yes
No		No	No	No	No
No		No	No	No	No
No					
35'		35'	35'	45'	45'
30'		20'	25'	25'	25'
buffer by use		20'	20'	20'	20'
buffer by use		5'	10'	10'	10'
NA					
NA					
NA					
70'		40'	70'	70'	70'
7000		3,500 sq ft	10,890 sq ft	8,175 sq ft	6,540 sq ft
60%		NA	70%	75%	75%
20%		35%	40%	40%	40%
0.2		NA	NA	NA	NA
NA		12.4	12	15.9	15.9



Table 12. Zoning—Corridor Overview (continued)

	HILLSBOROUGH COUNTY				
			Special Public Interest - University Community		
	RSC-6	RSC-9	SPI-UC-1	SPI-UC-2	UCA-NHO
Within Pedestrian Shed of Transit Stop?	yes	yes	yes	yes	yes
Form-Based Code?	No	No	No		
Public Realm Standards?	No	No	No		
Architecture Standards?					
Height	35'	35'			
Front Setback	20'	15',5'			
Rear Setback (Interior Lot/Corner Lot)	25'	20'			
Side Setback	7.5'	5'			
Streetwall % A Street					
Streetwall % B Street					
Streetwall % C Street					
Minimum Lot Width	70'	50'			
Minimum Lot Area (ft2)	7,000 sq ft	5,000 sq ft			
Maximum Impervious	NA	NA			
Maximum building coverage	40%	40%			
Maximum FAR	NA	NA			
Maximum density (du/acre)	6.2	8.7			
Parking ratios					
Parking configuration					
Market-based parking?					
Mixed Use Allowed					



OUTREACH & ENGAGEMENT



8. OUTREACH & ENGAGEMENT

Project outreach and engagement is designed to educate stakeholders about the project and gather meaningful input and feedback to guide planning activities. Due to the current COVID-19 global pandemic, planned outreach and engagement activities were adjusted to accommodate “physical distancing” guidelines set forth by the CDC which aims to limit large gatherings and close contact of individuals. Project engagement resources were shifted from traditional public workshops early in the project to support the use of an online engagement platform with robust tools for soliciting and capturing public feedback.

8.1. HART TOD WEBSITE

The first component of the outreach strategy was to develop a highly interactive study website using the Engagement HQ platform. The study website provides information about the study and schedule, offers regular status updates, and provides educational materials introducing TOD and TOD resources. It also provides a platform for interactive surveys and crowd sourcing tools, and will provide draft study documents.

Study website objectives included:

- Introduce study and communicate study purpose and outcomes.
- Share information about TOD concepts and benefits.
- Share information about corridor conditions.
- Seek input on issues and ideas for changes in land use, access, and mobility along the project corridor.

From its launch in July 2020 to present day (November 2020), the site had a total of 371 unique visits. Traffic

has primarily been channeled through direct website link sharing between visitors.

The interactive mapping tool has seen the most activity, with 81 visitors, 11 contributors, and 38 pins. This tool allows people to drop a pin and identify what’s working, what needs improvement, and to share ideas for change, e.g. potential changes along the project corridor that could make the neighborhood a better place to safely live, do business, and access jobs and opportunities. The “needs improvement” category received the most pins at 31%, followed by the “new uses & activities” category with 28% of pins. Map comments under the “needs improvement” category were focused on increased bus frequency, concerns about pedestrian and bicycle safety along busy auto-oriented streets, and how conditions/facilities can be improved. Map comments under the “new uses & activities” category were focused on areas where mixed-use redevelopment was desired.

Future email blasts and social media posts will promote the availability of this Context Assessment report on the study website, as well as future project documentation.

Figure 52. Study Website—goHARTTOD.org. Home Page

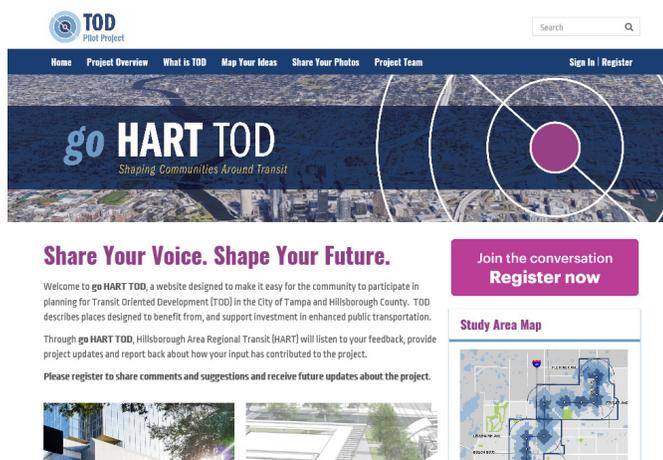
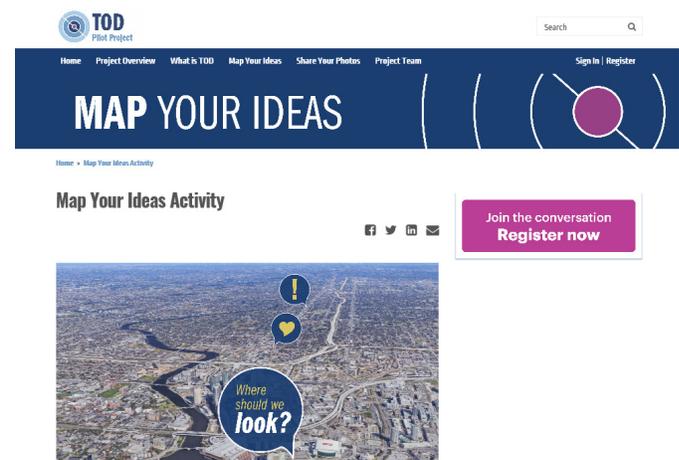


Figure 53. Study Website—goHARTTOD.org. Mapping Activity





8.2. LISTENING SESSIONS & WORKING GROUPS

The next component includes listening sessions and working group meetings with key community stakeholders to hone in on specific audiences and those who may be more difficult to engage with the new online approach. Initial Listening Sessions to introduce project, share information about schedule, discuss planned communication/engagement strategies, and solicit information about ideas and expectations took place on September 9-10, 2020 and were hosted on the Webex virtual meeting platform.

Due to relatively low turn out on the Listening Session calls, the study team created a more targeted Working Group. Building on the membership of the HART Arterial BRT Steering Committee the Working Group includes representatives of neighborhood and business associations, major property owners, developers and builders active along the corridor, and representatives of major institutions. The first Working Group meeting took place via Webex on September 23 and included 31 participants. The agenda included a welcome/roll call, introduction of the project, and an open discussion on the group's priorities/concerns/ideas, and how best to reach them and their audience. Working Group meetings will generally take place on a bimonthly basis, with the next meeting occurring on November 18, 2020.

8.3. REAL ESTATE INFORMANT INTERVIEWS SUMMARY

SB Friedman conducted informant interviews with developers, economic development officials and local planners, and representatives of key local institutions active in the market. The purpose of these interviews was to gain an understanding of key market dynamics impacting TOD potential, including: perceptions of strengths and weaknesses of the subareas; any barriers to development and business attraction, including regulatory issues, financial feasibility, desired amenities, and needed infrastructure improvements; rents, prices and absorption trends/data for land uses being analyzed; and aspirations for the future.

Figure 54. Working Group Participants (with webcams on)

