

Target Employment & Industrial Land Study (TEILS) – Board Update

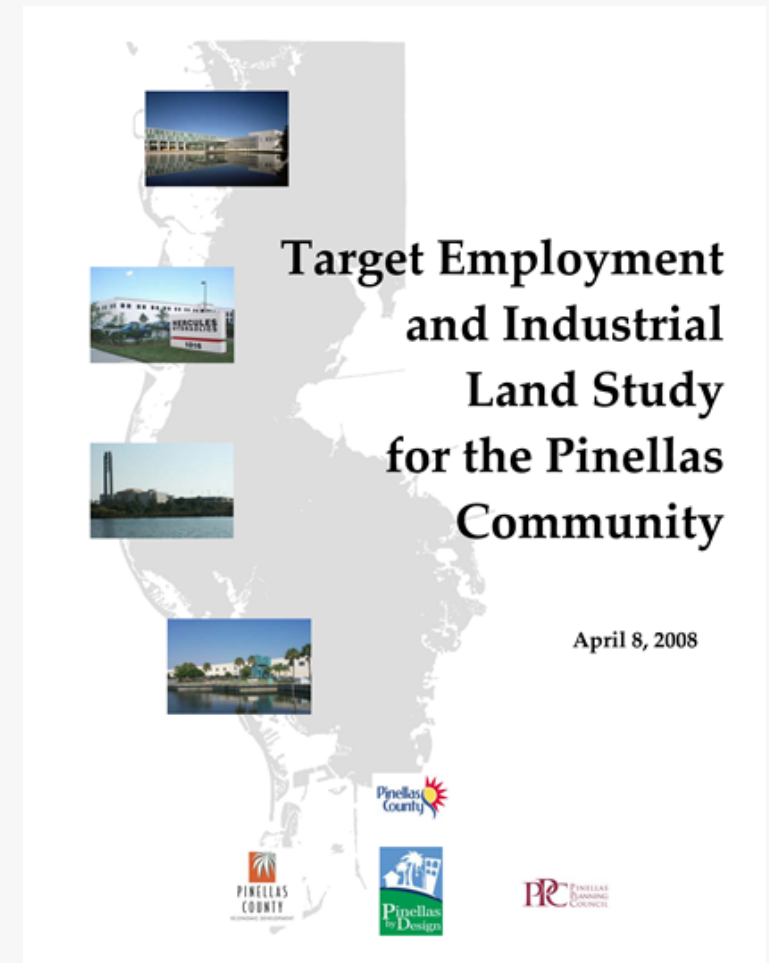
November 9, 2022

Target Employment & Industrial Land Study (2008)

Key Findings

- Pinellas County is a redeveloping county with limited available land for new development countywide.
- 264 acres of land designated for industrial use were converted to other designations between 2003-2006.
- 8,000 acres is needed to accommodate 182,000 new jobs – only 4,000 acres of vacant land was available to accommodate target employment.

2008 TEILS Takeaway: The county must attract or create 182,000 new jobs by 2025. About 50,000 should be with target employers and pay 30% above the average area wage.



Real Estate Space Needs

Real estate needs vary by Target Industry



BUSINESS SERVICES



FINANCIAL SERVICES



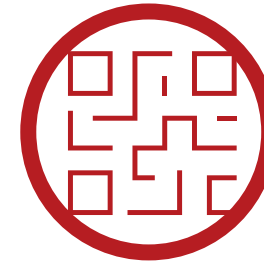
MARKETING, DESIGN, & PUBLISHING



INFORMATION TECHNOLOGY



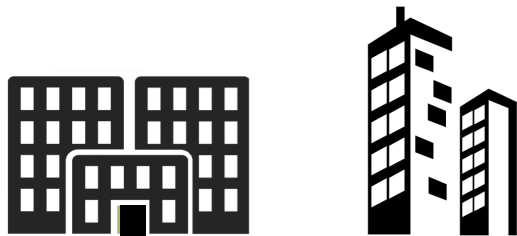
MEDICAL TECHNOLOGIES / LIFE & MARINE SCIENCES



MICRO-ELECTRONICS



AVIATION/AEROSPACE/DEFENSE



CLASS A OFFICE SPACE



INDUSTRIAL SPACE & HQ OFFICE SPACE

Study Update Approach



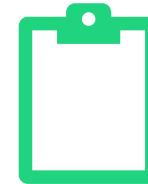
New and potential legislation could put redevelopment pressure on industrial and employment land



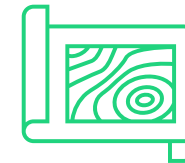
TARGET INDUSTRY ANALYSIS
Identify what jobs are important to preserve and grow



MARKET ANALYSIS
Understand demand for industrial and office space/land



SURVEY & INTERVIEWS
Understand perspectives of industrial and office space users



GIS ANALYSIS
Evaluate land use patterns and sites susceptible to change





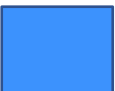



2 ROUNDTABLE DISCUSSIONS & 3 COMMUNITY MEETINGS

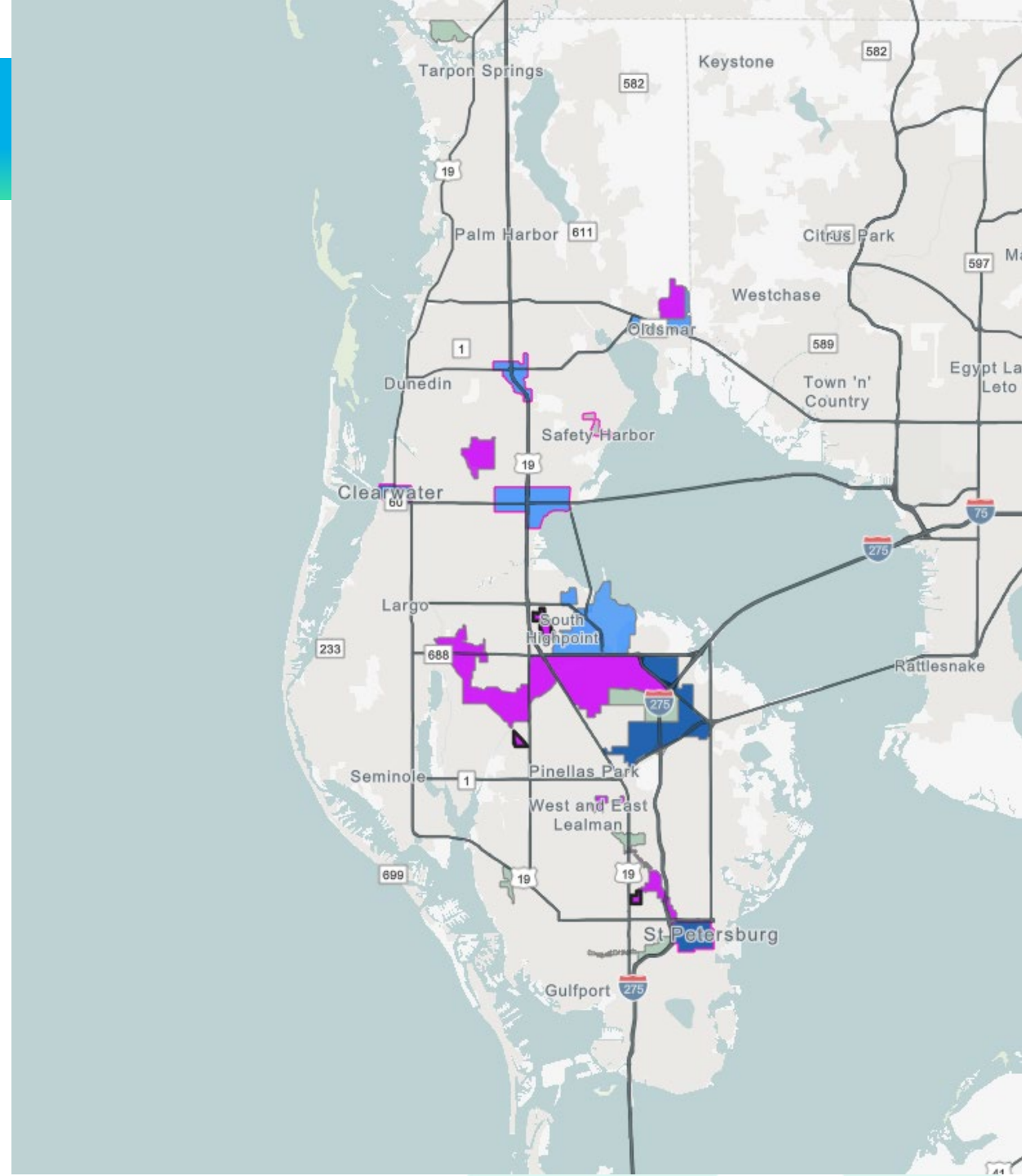
3 ADVISORY COMMITTEE MEETINGS

Draft Policy Recommendations

Policy Recommendations

Create tailored land use for each TEC

Existing	Proposed	
		TEC – Local
		TEC – Suburban Industrial
		TEC – Suburban Office
		TEC – Urban



TEC Local

- Suited for areas that house smaller scale manufacturers and artisan users with industrial and warehouse space needs
- **Will be allowed to flex and mix uses, in conjunction with local sub-area planning efforts (visioning studies, special area plans, etc.)**
- Allows for greater local control over smaller scale employment areas
- *Example: Warehouse Arts District*



TEC Suburban Industrial

- Large scale target employment uses that are currently existing, or proposed, to have lower density, large building footprints with more suburban character
- **This TEC category will be allowed to incorporate a mix of industrial and commercial uses, as long as the target employment uses are preserved within future proposed developments**
- Additional investment from local and county partners will be encouraged to foster modernization of buildings and infrastructure in support of retention and growth of target employment uses
- *Example: Hercules Industrial Park*



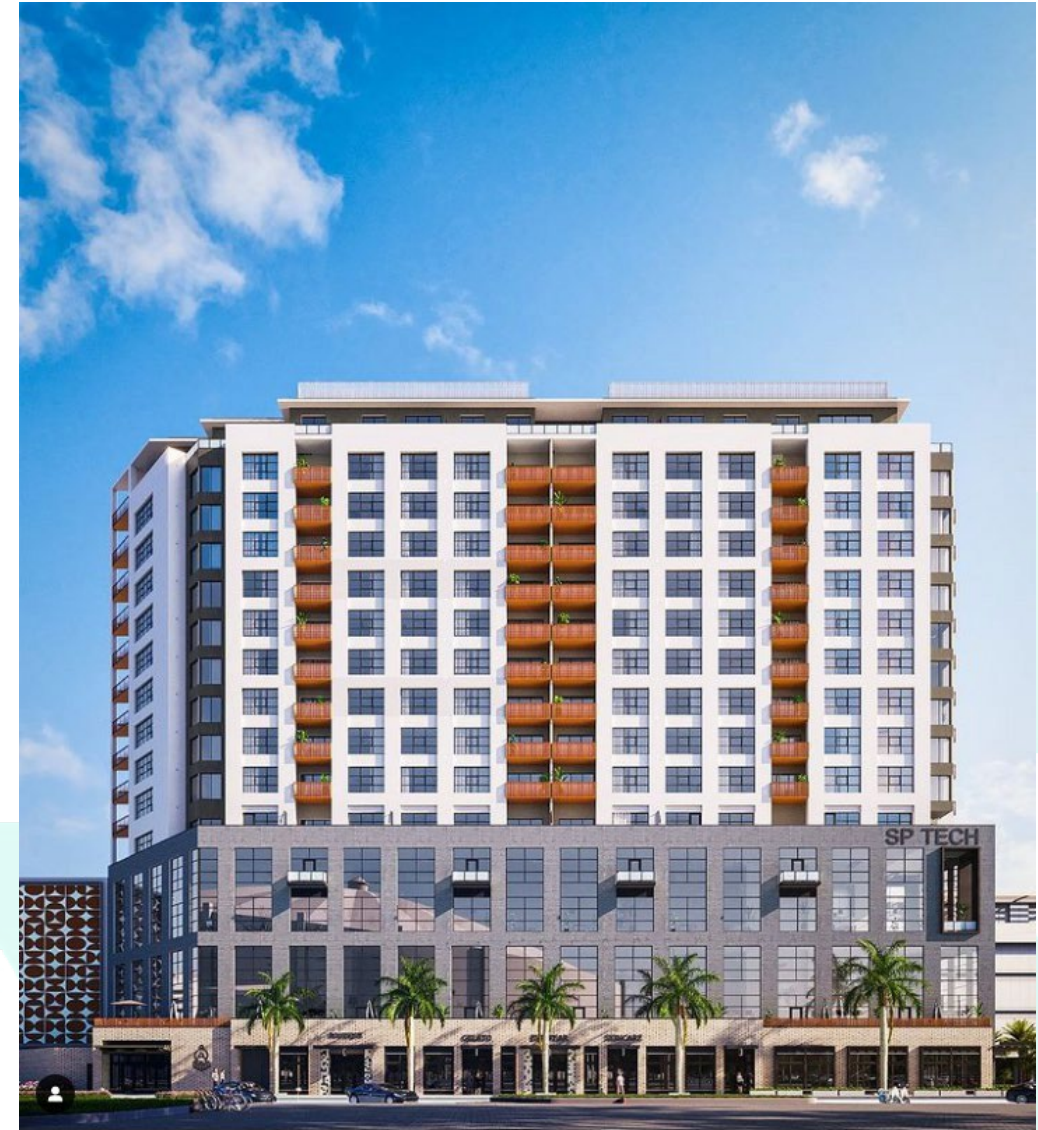
TEC Suburban Office

- Large scale target employment uses that are currently existing, or proposed, to have a more campus-style character
- **Will be allowed to incorporate a mix of uses including residential and commercial, as long as the target employment uses are preserved**
- With proper placemaking efforts these areas could urbanize and allow for a greater density and intensity of uses, **greater concentration of Class A Office space, and a greater mix of commercial and residential uses, where appropriate**
- *Examples: Northern Gateway (Bay Vista)*



TEC Urban

- Large scale target employment uses that are currently existing, or proposed, to have a denser, vertically mixed-use character
- **House major target employers that aim to locate in a Class A Office environment surrounded by similar target employment types, and existing quality of life elements such as commercial and residential amenities that are all within a reasonable walkable travel-shed**
- Given the greater densities and intensities associated with this TEC category, the opportunity for a greater mix of uses is very high making these sites desirable for newer target employers looking to relocate in Pinellas County
- *Examples: Downtown St. Petersburg and Clearwater*



Other Recommendations

- Workforce development strategy alignment with Target Industries



INFORMATION TECHNOLOGY

AVAILABLE SKILLS/POSITIONS

- ✓ Basic Knowledge/Experience
- ✓ Degreed Individuals
- ✓ Motivation/Work Ethic
- ✓ Programming (Certifications but w/o Experience)
- ✓ General Technical Competence

CHALLENGING SKILLS/POSITIONS

- ✗ Experience
- ✗ Specific Languages (e.g. PHP, MySQL) (one noted that training, methods, and languages seemed to significantly lag those in other "major" tech hubs)
- ✗ Data Scientists
- ✗ Web Developers
- ✗ Cross Training
- ✗ Teamwork/Team Environment



BUSINESS SERVICES



FINANCIAL SERVICES

AVAILABLE SKILLS/POSITIONS

- ✓ Bookkeeping
- ✓ Educational Attainment/Degrees
- ✓ Customer Service
- ✓ Analytical Thinking
- ✓ Accounting
- ✓ Microsoft Office

CHALLENGING SKILLS/POSITIONS

- ✗ People/Soft Skills
- ✗ Specific Industry Certifications
- ✗ Advanced Finance
- ✗ Advanced Accounting
- ✗ Longevity in one position
- ✗ Experienced Sales



MICRO-ELECTRONICS



AVIATION/AEROSPACE/DEFENSE

AVAILABLE SKILLS/POSITIONS

- ✓ Basic/Entry Level Engineers
- ✓ Computer Programming
- ✓ Educational Background
- ✓ Systems Engineering
- ✓ Mechanical Engineers

CHALLENGING SKILLS/POSITIONS

- ✗ Experienced Engineers
- ✗ High End IT/Technologies/Languages (e.g. Oracle, MySQL)
- ✗ AutoCAD
- ✗ Soft Skills
- ✗ Troubleshooting
- ✗ Mechanical/Electrical Drafting
- ✗ Electric Engineers



MEDICAL TECHNOLOGIES / LIFE & MARINE SCIENCES

AVAILABLE SKILLS/POSITIONS

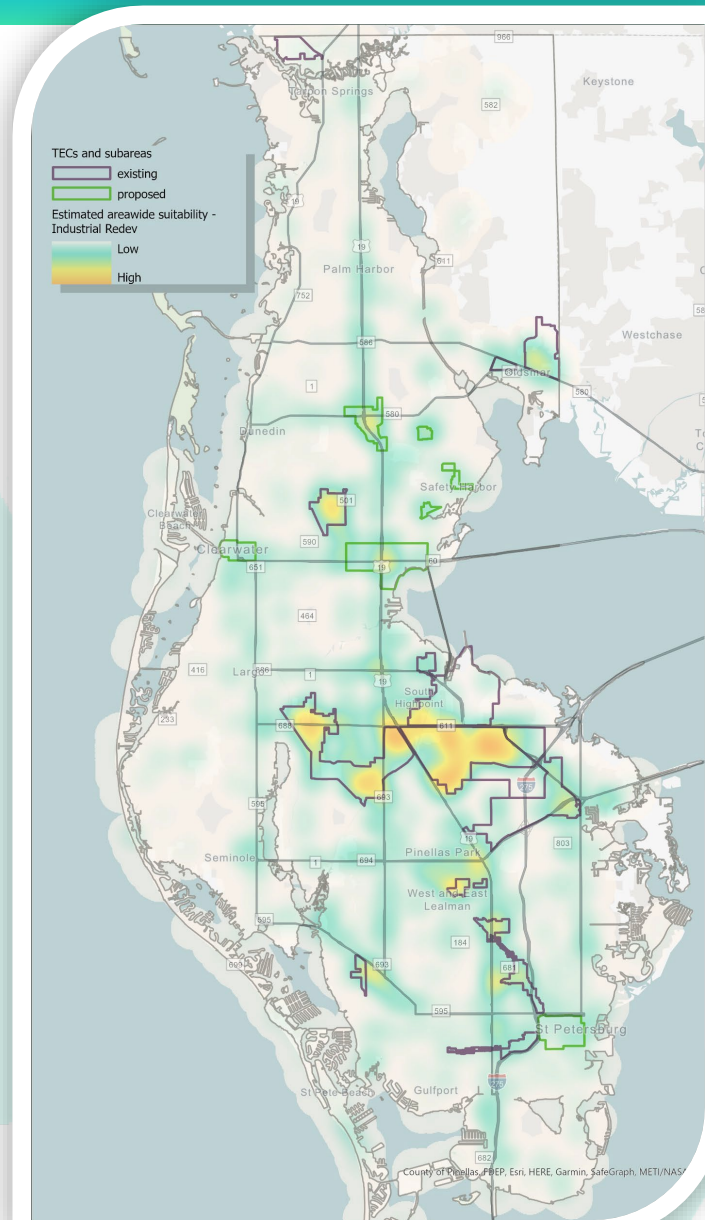
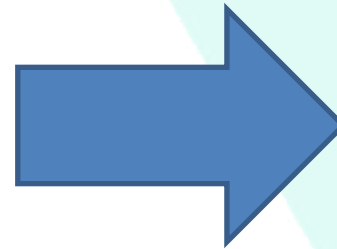
- ✓ Basic Knowledge/Experience
- ✓ Educational Background
- ✓ Educational Attainment/Degrees
- ✓ Analytical Thinking
- ✓ Competitive Wages

CHALLENGING SKILLS/POSITIONS

- ✗ Lower Growth Trends Than Other Surrounding Regions
- ✗ Higher Than Average Educational Requirements
- ✗ Not Competitive With Surrounding Metropolitan Areas (Atlanta, Nashville, Charlotte)

Other Recommendations

- Revisit Housing Compact considering TEILS findings to look at suitability for mixed income housing



Other Recommendations

- Small Area Planning for TECs
 - Consolidated Stormwater Strategy
 - Placemaking Strategy for Walkability, Mixed Use and Urban Form
 - Infrastructure Upgrades
 - Revisit Parking Regulations (less land consumptive)
- Additional incentives needed for infill and redevelopment
- Factor in TEILS findings to Economic Development Visioning
- Regular updates of TEILS to track and monitor changing nature of work and land availability over time

Stakeholder Engagement & Partnerships

- Warehouse Arts District Stakeholder Meetings
- Workforce & Affordable Housing Partner Roundtable Discussion
- Meeting(s) with our various local governments
- Countywide Planning and Economic Development Roundtable Discussion
- TEILS – Advisory Committee Meetings
- Meeting(s) with the Upper Tampa Bay Chamber of Commerce
- Lealman Community Redevelopment Area Advisory Committee Discussion

Timeline

- Bring TEILS final report, findings and recommendations to our Board for adoption (**January**)
- Begin working on Countywide Plan Policy changes based on report findings and recommendations (**January-May**)
- Bring all necessary changes to the Countywide Plan related to the TEILS work to the board for adoption (**May 2023**)
- Local governments may begin updating local Comprehensive Plans to factor in Countywide Plan changes related to the TEILS work (**after May 2023**)

Questions?