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September 28, 2020

Brently Gregg Mims, City Manager  
City of Indian Rocks Beach  
1507 Bay Palm Boulevard  
Indian Rocks Beach, Florida, 33785

Re: Transmittal of Final City of Indian Rocks Beach Gulf Boulevard Visioning Study

Dear Mr. Mims,

Attached please find the Final City of Indian Rocks Beach Gulf Boulevard Visioning Study Report and Appendix. Forward Pinellas has enjoyed partnering with the City of Indian Rocks Beach on this project, and we look forward to seeing the implementation efforts conducted that reflect the recommendations presented in the Visioning Study. If you have any questions regarding the Visioning Study, please contact Christina Mendoza, at 727-464-5693.

Sincerely,

Whit Blanton, FAICP  
Executive Director

Attachment



# City of Indian Rocks Beach

## Gulf Boulevard Visioning Study



**FORWARD  
PINELLAS**  
Integrating Land Use & Transportation



August 2020

# City of Indian Rocks Beach

## Gulf Boulevard Visioning Study

### Prepared For:

**The City of Indian Rocks Beach  
1507 Bay Palm Boulevard,  
Indian Rocks Beach, FL 33785**

### Prepared By:

**Forward Pinellas  
310 Court Street,  
Clearwater, FL 33756**



**FORWARD  
PINELLAS**  
Integrating Land Use & Transportation



# City of Indian Rocks Beach

## Gulf Boulevard Visioning Study

### Executive Summary

The City of Indian Rocks Beach is a vibrant community with lots to offer residents and visitors. To guide how the community will move forward into the future, Forward Pinellas partnered with the City of Indian Rocks Beach and IRB Action 2000, Inc. (A2K), a non-profit organization that has been working to preserve the character of Indian Rocks Beach, to conduct a Gulf Boulevard Visioning Study. The purpose of the study is to develop a vision for the future of the City that reflects the values, goals and priorities of the residents, with a focus on the Gulf Boulevard corridor.



This study builds on the research and recommendations presented in the *Indian Rocks Beach Special Area Plan: A Vision for Growth and Development*, conducted in 2009 by the Florida Center for Community Design and Research at the University of South Florida. This study is meant to provide guiding principles that will lead to the implementation of a vision that is reflective of common goals for the future of Indian Rocks Beach. Developing the vision for Indian Rocks Beach and Gulf Boulevard was a multi-step, iterative process that included extensive public involvement. Three workshops were held to gather input and data from the public, and a broad existing conditions and indicators analysis was conducted.

Additional stakeholder interviews were also conducted throughout the visioning process to ensure understanding of the community's position on key elements presented in this report. Based on the input the study team received and the data gathered, four key overarching themes were identified: Economic Vitality, Community Character, Transportation and Mobility, and Quality of Life and Environmental Protection. To



address the community's goals and priorities, an evaluation of comparable communities was conducted to identify strategies Indian Rocks Beach could consider implementing. The study team identified four comparable communities to Indian Rocks Beach: Anna Maria Island, Siesta Key, Dunedin, and Safety Harbor. Based on the information gathered from the case study analysis and continued input from the community, the study team identified strategies specific to Indian Rocks Beach that the community could consider to address key elements under each theme.



Based on the strategies identified, the report presents guiding principles that the community could use in the implementation of its vision, and vision statements that were developed by the community to summarize their values, priorities and goals. The vision statements and associated guiding principles are outlined below:

## Economic Vitality



### Vision

**Promoting a vital local economy that is nourished by community support, where businesses are accessible and where visitors, residents, and business owners share a sense of belonging. In this community, we live, work, and play with the beach always in mind.**

### Guiding Principles

- 1. Encourage the success of local small businesses through the creation of commercial areas that serve as a destination for residents and visitors.**
- 2. Promote the creation of a business-friendly environment throughout the City, to foster the vitality of new and existing businesses.**



## Community Character



### Vision

**Preserving the City’s small-town atmosphere and providing a walkable community, while encouraging small-scale strategic development and promoting our “Old Florida” feel through the preservation of the community’s historic resources.**

### Guiding Principles

- 1. Preserve the existing character and form of the community while encouraging strategic, small-scale commercial development and redevelopment.**
- 2. Maintain the identity of the community through the preservation of the community’s historic resources.**
- 3. Maintain the “Old Florida” feel in the community through the incorporation of public art and streetscaping.**

## Transportation and Mobility



### Vision

**Continuously striving for the creation of a congestion-free, walkable, bikeable community that promotes and values the safety of all road users.**

### Guiding Principles

- 1. Develop a transportation network that enhances mobility options and accessibility of all users and promotes congestion reduction.**
- 2. Foster a safe walkable and bikeable environment that improves the community’s health and wellbeing, while encouraging multimodal transportation.**
- 3. Provide transportation options that are convenient and affordable and scaled to the community’s needs.**



## Quality of Life and Environmental Protection



### Vision

**Maintaining a thriving beach community that fosters a safe, livable, and clean environment with a passion for wildlife and beach protection and preservation.**

### Guiding Principles

- 1. Encourage open space preservation and maintenance of greenspace to promote a healthy environment and quality of life.**
- 2. Create a more resilient community through the use of planning tools that will help to predict the potential impacts of sea level rise.**
- 3. Ensure the maintenance of adequate stormwater and drainage infrastructure to reduce the likelihood of potential damage from flooding events.**
- 4. Encourage beautification efforts throughout the community to remove litter and promote a healthy and clean environment.**

### Implementation

Through the incorporation of strategies to address the guiding principles associated with each theme and corresponding vision statement, the community can move forward to the implementation stage of its vision. To promote a successful local economy, the community needs to support local businesses through the creation of commercial areas that are conducive to business vitality and provide the resources businesses need for start-up and training. This can be done through partnering with organizations and developing programs that provide information and professional networking opportunities for small businesses to share ideas and overcome challenges.

To maintain the character and form of the community while encouraging small-scale, strategic development and redevelopment, the community should encourage the use



of historic preservation concepts, while making strategic changes to the Land Development Code (LDC) that will allow for the creation of a more pedestrian-friendly environment, such as reduction of setbacks in the commercial areas, reducing parking standards, replacing vehicle parking with bicycle parking, and allowing for stormwater to locate off-site. To create a desirable “village center”, the incorporation of small-scale mixed-use development coupled with streetscaping and public art creates a sense of place where people would like to spend time. The community must decide if they want this type of development in the future, as it will require some type of incentivizing to encourage it.

To promote a congestion-free, walkable, bikeable community, the City needs to continue to enforce existing traffic laws and the 30-mph speed limit on Gulf Boulevard through the Pinellas County Sheriff’s Office, while implementing strategies to ease congestion. Strategies include evaluating the feasibility of the use of a circulator service within the community. The City can create a multimodal transportation network through strategies such as the incorporation of additional bike parking, biking incentives, and “bicycle friendly city” signs to raise awareness.

To maintain a beach community with a safe, livable, and clean environment, the City can preserve its greenspace through the purchase and transfer of development rights. The City also needs to incorporate resiliency into its planning efforts. Modeling for sea level rise and storm surge can help to anticipate and mitigate potential impacts from climate change.

### Next Steps

The strategies presented in this report are meant to serve as options the community can consider in the future. It is up to the residents and community leaders to determine the path they would like to take. The recommendations section identifies a timeframe for each recommendation presented in this report. In the short term, the City should focus on elements such as making changes to their LDC to reflect recommendations in this report. In the mid-term and long term, the City should focus on implementing some of the more complex recommendations. Using their vision statements as a guide, the community can continue to work toward achieving its goals and objectives for future generations.



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# 1

## Introduction to the Visioning Study





is easy to understand and communicate, is shared by the community, is broad in nature and reflects local perspectives and is inspiring and uplifting.<sup>ii</sup> Developing the vision for Indian Rocks Beach and Gulf Boulevard was a multi-step, iterative process that involved extensive public involvement. The first step was to reevaluate whether the vision presented in the 2009 Special Area Plan (SAP) was one that the community was still interested in pursuing. Three workshops were held to gather input and data from the public, and an extensive existing conditions and indicators analysis was conducted. The indicators analysis was created in an online platform that features key data on the City's existing conditions in an interactive format. The City also worked with SB Friedman Development Advisors to conduct a retail market assessment analyzing the market feasibility of new retail development within the City. Additional stakeholder interviews were also conducted throughout the visioning process to ensure understanding of the community's position on key elements presented in this report. Based on the input the study team received and the data gathered, four key overarching themes were identified: Economic Vitality, Community Character, Transportation and Mobility, and Quality of Life and Environmental Protection.

To address the community's goals and priorities, an evaluation of comparable communities was conducted to identify strategies Indian Rocks Beach could consider implementing. The study team identified four comparable communities to Indian Rocks Beach: Anna Maria Island, Siesta Key, Dunedin, and Safety Harbor. Based on the information gathered from the case study analysis and continued input from the community, the study team identified strategies specific to Indian Rocks Beach that the community can consider to address key elements under each theme. Based on the strategies identified, the report presents guiding principles that the community could use in the implementation of its vision, and vision statements that were developed by the community to summarize their values, priorities and goals.



# 2

## Putting the Vision in Context



## 2.1 Community Context

Indian Rocks Beach is one of ten beach communities within Pinellas County. It is located on the barrier island of Sand Key and is bordered by the Town of Belleair Beach to the north and the Town of Indian Shores to the south. The main north-south access route to all the beach communities is Gulf Boulevard (S.R. 699), which ranges in width from two lanes to four lanes throughout the length of the corridor from Clearwater Beach south to St. Pete Beach. Within Indian Rocks Beach, Gulf Boulevard is a two-lane roadway with a center turn lane from 28<sup>th</sup> Avenue south to 5<sup>th</sup> Avenue and is managed by Pinellas County. From 5<sup>th</sup> Avenue (Walsingham Road) south to the City's southern limits, Gulf Boulevard is a two-lane roadway and is managed by the Florida Department of Transportation (FDOT). The other roadway that provides access to Indian Rocks Beach is Walsingham Road (S.R. 688) which provides a connection to the mainland.<sup>iii</sup>

In the 2009 SAP, the City was divided into three commercial areas as focal points for future redevelopment activity: the Uptown Commercial Area, the Midtown Commercial Area, and the Narrows, which includes the business district triangle. In this study, these commercial areas were re-examined and used to evaluate retail potential within each area. Some of the boundaries have shifted to reflect the community's new priorities and can be seen in **Figure 2** on the next page.



### Uptown Commercial Area

The Uptown Commercial Area is located in the northernmost part of the city and extends from 28<sup>th</sup> Avenue (the City's northern border) south to 22<sup>nd</sup> Avenue. The commercial area is focused around Gulf Boulevard and extends east to 1<sup>st</sup> Street and west to the beach. Retail development in this area primarily consists of stand-alone or strip retail centers with convenience-oriented uses.

### Midtown Commercial Area

The Midtown Commercial Area is located south of Uptown and extends from 18<sup>th</sup> Avenue south to 11<sup>th</sup> Avenue. This commercial area is also focused around Gulf Boulevard and extends east to 1<sup>st</sup> Street and west to the beach. Retail development in this area primarily consists of convenience-oriented and neighborhood-serving uses in strip retail centers.

### The Narrows

The Narrows is a commercial area located in the southern part of the city and extends from 6<sup>th</sup> Avenue south to 1<sup>st</sup> Avenue and to the city's eastern borders and west to the beach. These boundaries have been modified from the 2009 SAP to reflect local priorities. Originally, the Narrows commercial area extended to the southern city limit; however, development in this part of the Narrows is primarily residential and hotel/motel uses.



## 2.2 Trends and Conditions

Indian Rocks Beach has seen a gradual increase in population over the last nine years. The population in Indian Rocks Beach grew by seven percent, from about 4,100 people in 2010 to about 4,400 people in 2019. The City’s population is projected to stay around 4,400 people by 2024.<sup>iv</sup> However, it is important to note that the number of vacation rentals within the City may impact the population projections in the future.



The number of households in the City increased by over four percent between 2010 and 2019, from about 2,200 households in 2010 to about 2,300 households in 2019 and is projected to increase to about 2,400 households in 2024. The difference in the projected growth in households and population can be attributed to the trend of residences being converted into vacation rentals, which do not bring new permanent residents into the City. The median household income in 2019 was about \$77,800 and is projected to be about \$87,800 by 2024. In 2019, 75 percent of the employed population 16 years or older worked in white collar positions, 17 percent worked in the service industry, and 9 percent worked in blue collar positions. The unemployment rate in 2019 was two percent.<sup>v</sup> From 2014 to 2019, the number of jobs in the City increased by 10.1 percent, from about 1,800 to about 2,000, which was higher than Pinellas County’s growth rate of 9.5 percent,<sup>vi</sup> and the national growth rate of 6.9 percent.<sup>vii</sup>

### Tapestry Segmentation

Table 1: LifeMode Groups and Tapestry Segments in Indian Rocks Beach  
Source: © Esri Tapestry Segmentation

As part of the analysis, the study team used Esri’s Tapestry Segmentation tool to characterize the socioeconomic information for Indian Rocks Beach. The Tapestry Segmentation tool uses data to profile

	LifeMode Group		
	GenXurban	Cozy Country Living	Senior Styles
Tapestry Segment & % of Households	In Style (15.0%)	Great Outdoors (31.4%)	Silver and Gold (13.0%)
			Golden Years (40.6%)

communities based on their habits and interests using characteristics that identify consumer spending and individual preferences. It divides populations into 67 distinct “segments” and then groups the segments by “LifeMode Groups” which are groups that have a common trend. There are three “LifeMode Groups” in the City: “GenXurban,” “Cozy Country Living,” and “Senior Styles.” There are four Tapestry Segments in the City, and they are shown under their associated “LifeMode Groups” in **Table 1**. The table shows the Tapestry Segments and the percent of households in each Tapestry Segment. The Tapestry Segments in the City are: “In Style,” “Great Outdoors,” “Silver and Gold,” and “Golden Years,” and are shown in **Figure 3** on page 9.

### In Style

The “In Style” Group is defined by Esri as professional couples or single households without children that enjoy an urban lifestyle and environment, traveling, arts and leisure, and reading. The median age of the population in this group is 42, the average household size is 2.35, and the median household income is \$73,000.



### Great Outdoors

The “Great Outdoors” Group is defined as educated individuals with grown children that have moved out, living energetic yet humble lifestyles, are avid gardeners and prefer homegrown and homecooked meals. Retirement is nearing, however, most of these individuals still work and have incomes slightly higher than the US level. The median age of the population is 47.4, the average household size is 2.44, and the median household income is \$56,400.

### Silver and Gold

The “Silver and Gold” group is defined as the wealthiest senior market, which allows them to retire and relocate to warmer climates with vacation homes and high-class communities. They have the free time, energy, and means to live the life of luxury. The median age of the population is 63.2, the average household size is 2.03, and the median household income is \$72,100.

### Golden Years

The “Golden Years” group is defined as self-sufficient, lively seniors that are either retired or close to it. They are typically either single and living independently or have grown children that have moved out. For those that are still employed, they are in professional jobs, and are also involved in other personal hobbies and interests beyond work. The median age of the population is 52.3, the average household size is 2.06, and the median household income is \$71,700. <sup>viii</sup>

The Tapestry Segmentation and socioeconomic profile summary for Indian Rocks Beach can be seen in **Figure 4**. The image shows the top three tapestry segments based on percentage of households: “Golden Years,” “The Great Outdoors,” and “In Style.” This information aids in providing a better picture of the characteristics of the population located within the City. It helps to identify the community’s priorities that can directly impact the vision. Based on the information provided, the general population is well educated, have two person households, enjoy active lifestyles and spending time outside, have hobbies outside work, enjoy arts, leisure, gardening and homecooked meals, and are close to retirement or are already retired.



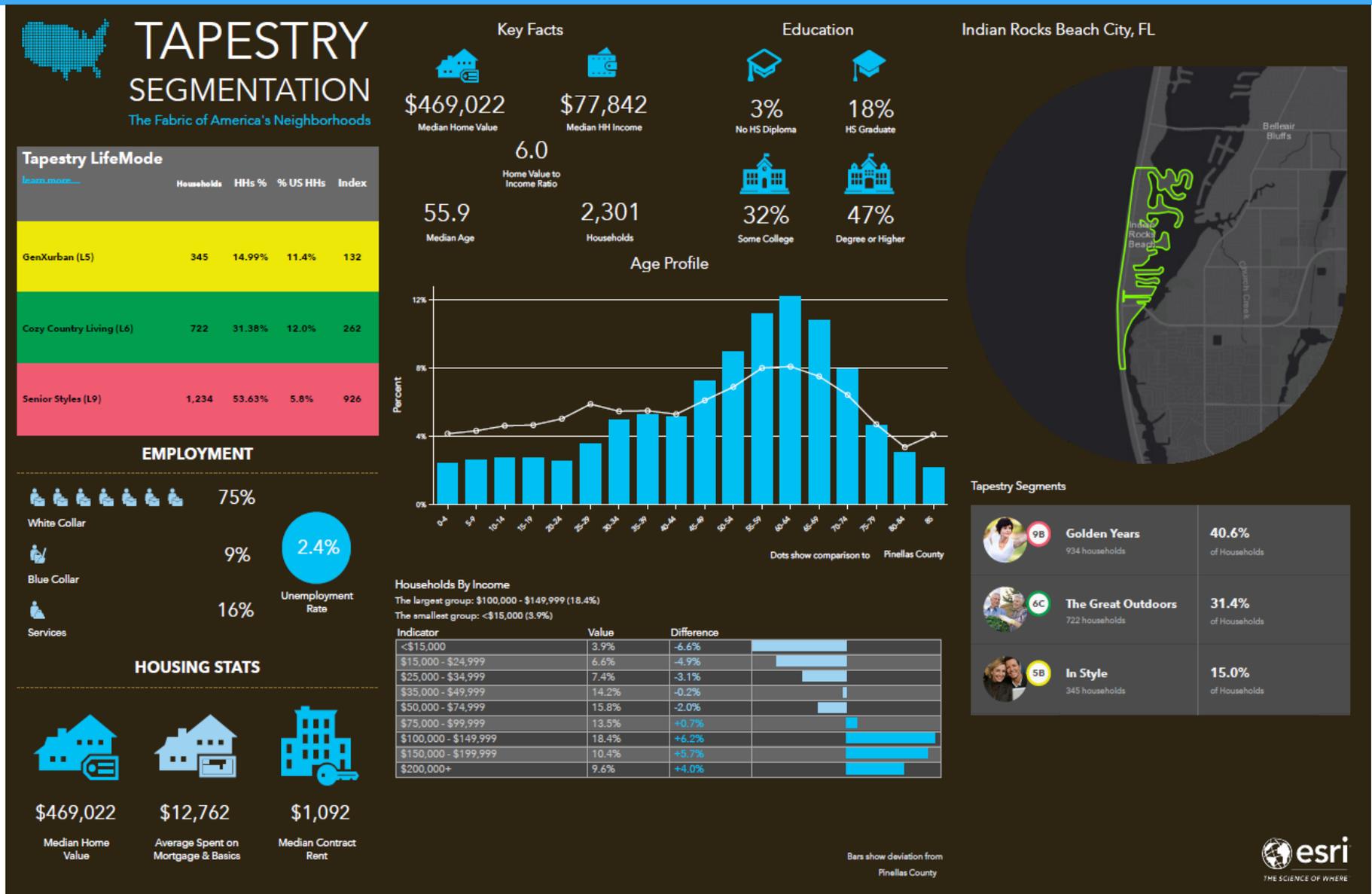


Figure 4: Tapestry Segmentation and Socioeconomic Profile for Indian Rocks Beach, Source: © Esri Tapestry Segmentation, Community Analyst, 2019

## Land Use and Zoning

The existing land uses within Indian Rocks Beach are primarily single-family residential, followed by multifamily, and vacant properties. The existing land use map for the City can be seen in **Figure 5** on the next page. **Table 2** shows the percent breakdown of the number of acres of each existing land use category within the City. Single-family residential accounts for about 47.6 percent of the land in the City, multifamily accounts for about 19.5 percent, and duplex/triplex/fourplex properties account for about 8.5 percent.

*Table 2: Existing Land Use by Acreage within Indian Rocks Beach  
Source: Pinellas County Property Appraiser, Forward Pinellas, 2019*

Existing Land Use	Acres	Percent
Commercial	13.7	3.3%
Duplex/Triplex/Fourplex	35.0	8.5%
Institutional	8.7	2.1%
Mixed Use	1.5	0.4%
Multifamily	80.0	19.5%
Office	4.2	1.0%
Preservation	10.7	2.6%
Recreation/Open Space	13.9	3.4%
Resort	16.5	4.0%
Single-Family	195.6	47.6%
Transportation/Utility	1.1	0.3%
Vacant	27.8	6.8%
Water/Drainage	2.3	0.6%
<b>TOTAL</b>	<b>410.9</b>	<b>100.0%</b>

**Figure 6** on page 13 shows the existing zoning within the City. The maximum allowable height in Indian Rocks Beach is 50 feet, which is allowed in the planned development district (PDD). There are currently no properties in the PDD, however any property that is located within the business triangle overlay zone can be re-zoned to PDD. The PDD cannot be applied elsewhere within Indian Rocks Beach. The medium density multifamily residential, high-density commercial tourist, and high-density commercial tourist 1 zoning districts allow heights up to 46 feet. Other zoning districts within Indian Rocks Beach: single family residential, medium density residential, professional office, business, neighborhood mixed use, recreation/open space, preservation, and public/semi-public allow for a maximum height of 35 feet. There is also a planned unit development (PUD) district that does not specify a maximum height.

# Indian Rocks Beach Existing Land Use Map

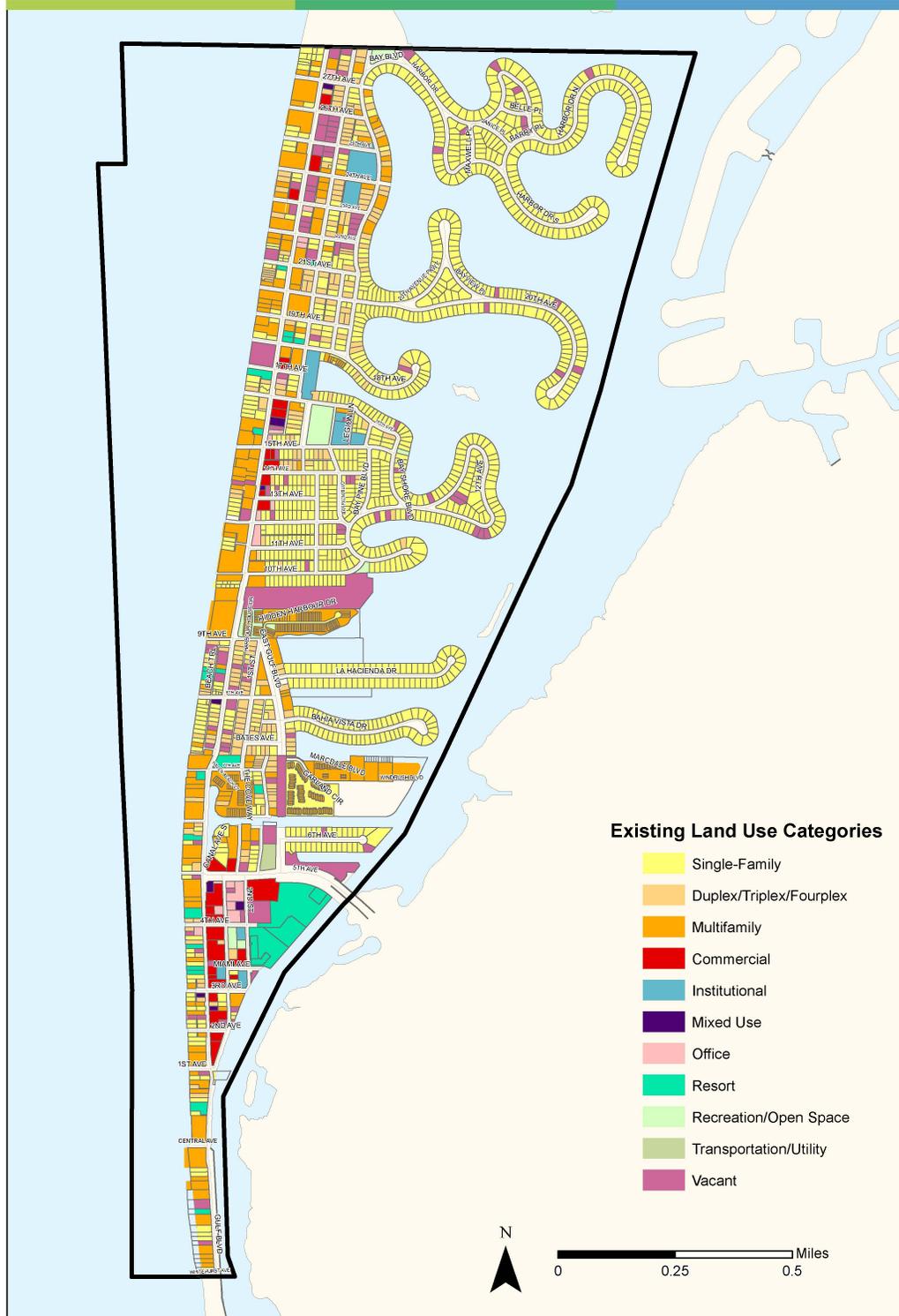


Figure 5: Indian Rocks Beach Existing Land Use Map,  
 Source: Pinellas County Property Appraiser, Forward Pinellas, 2019

## Indian Rocks Beach Zoning Map

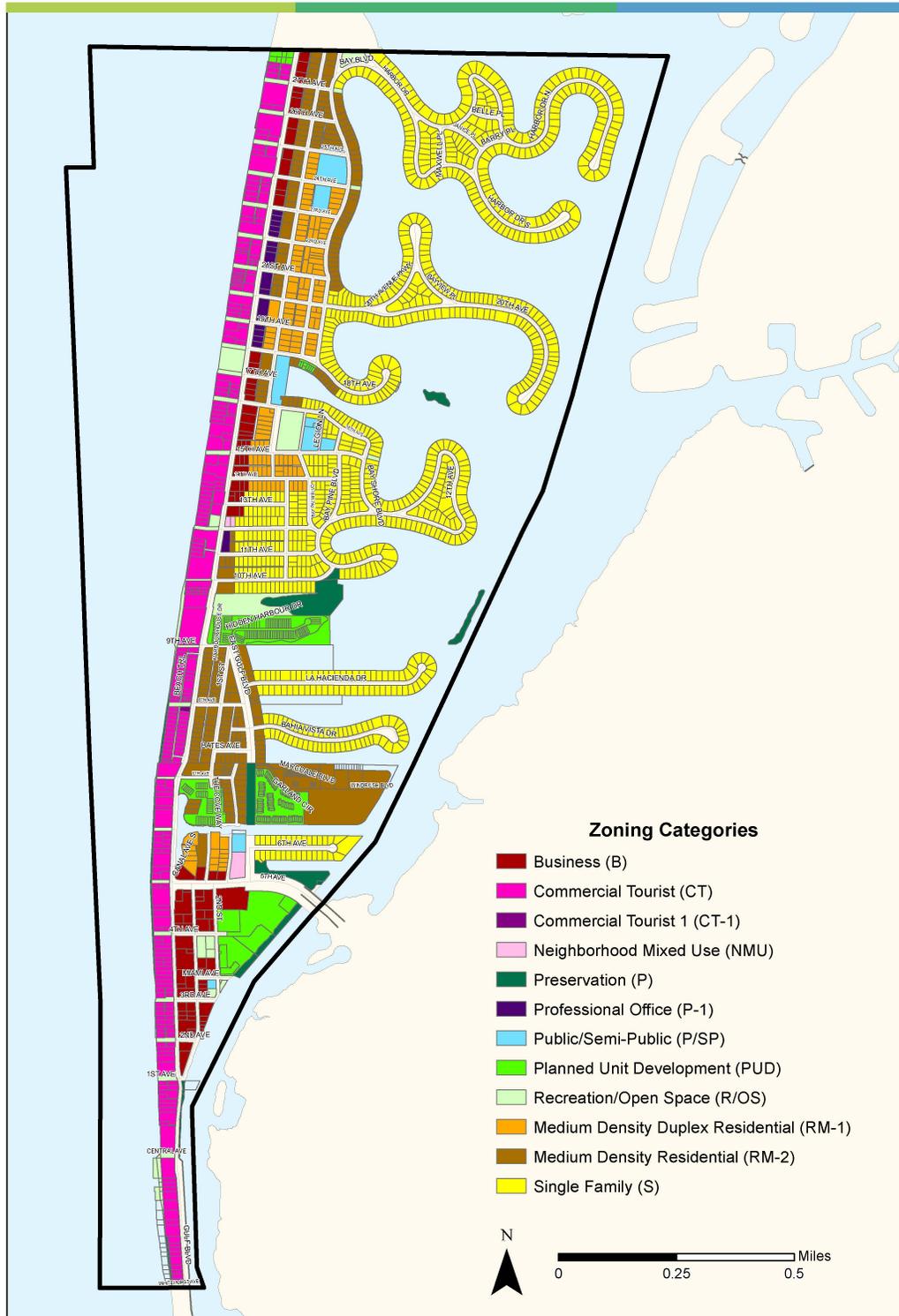
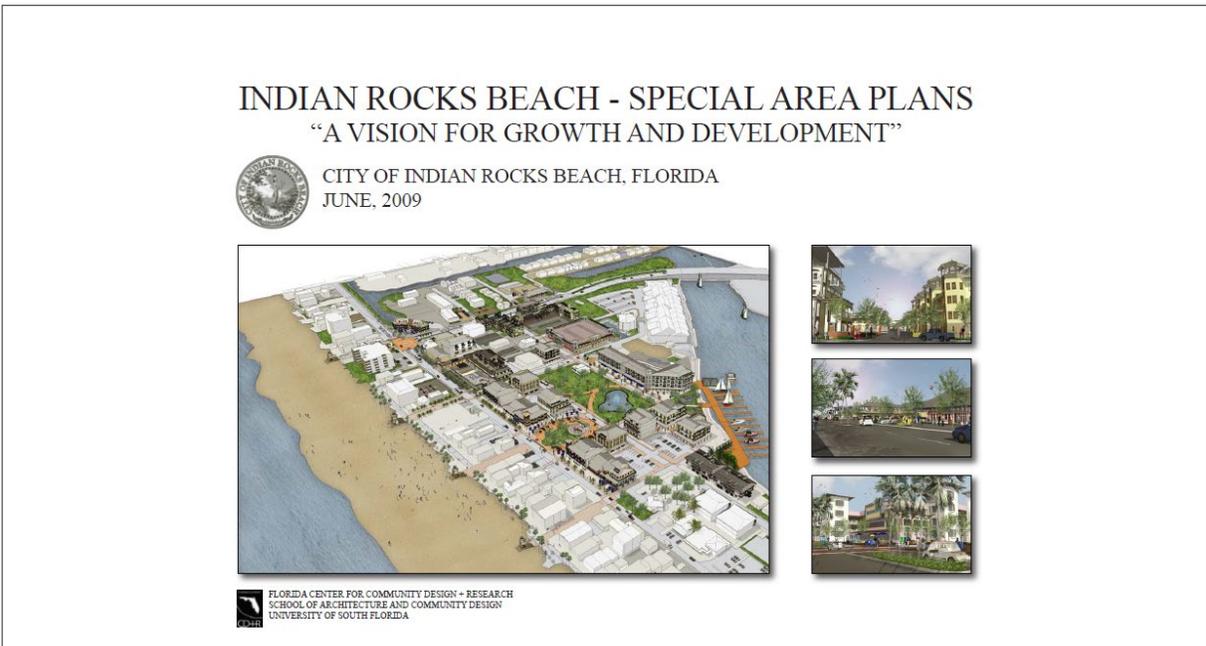


Figure 6: Indian Rocks Beach Zoning Map,  
Source: City of Indian Rocks Beach, Pinellas County Property Appraiser, Forward Pinellas, 2019

## 2.3 Previous Research

This report is meant to serve as an update to the *Indian Rocks Beach Special Area Plan: A Vision for Growth and Development*, conducted in 2009. It is meant to build on the research conducted in the development of the SAP and provide guidance to the City of Indian Rocks Beach in planning for the future.



### Indian Rocks Beach Special Area Plan: A Vision for Growth and Development

The 2009 SAP provided a long-range vision for the City to guide future growth and development. Many of the recommendations in the plan were implemented, however, there are some recommendations that were not due to various impediments that impacted the implementation. A key focus of City of Indian Rocks Beach Gulf Boulevard Visioning Study is to explore whether the community is still interested in pursuing the vision that was outlined in this plan.

#### The Uptown and Midtown Commercial Areas

The original vision for the Uptown and Midtown Commercial Areas consisted of vital neighborhood commercial areas with active business districts. Through a strategy that incorporates infill development, renovations to existing development, and public realm improvements, a more cohesive commercial area could form. During plan development the area had a series of smaller scale commercial uses with little connectivity.



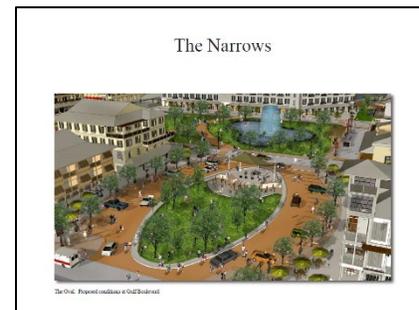
### Recommendations



The plan recommends consideration of the modification of land development regulations in these commercial areas to allow for more flexibility of mixed-use development. Revisions to the project approval process to allow more flexibility were also cited as a concern to allow for the construction of suitable building types and other infrastructure considerations to be incorporated into the commercial areas.

### The Narrows

The original vision for the Narrows consisted of revitalizing the existing business district and promoting mixed-use development to create a “village center” vibe, with the incorporation of streetscaping and infrastructure expansion. At the time, the region had a variety of small-scale commercial uses, without much private-sector investment.



### Recommendations

This plan promotes consideration of expanding basic infrastructure such as parking and stormwater/drainage improvements, as well as a recommended phasing plan and potential regulatory changes to promote the scale and type of development envisioned for the area. The plan proposed a regional stormwater pond in Chic-A-Si Park to address the on-site stormwater requirements of the Southwest Florida Water Management District (SWFMD). It also proposed consideration of a joint-use central parking facility to offset on-site parking requirements.

### Implementation Challenges and Opportunities

The SAP identified several key recommendations for the City. The recommendations that were not implemented were reevaluated during this 2020 study to determine their applicability based on the expressed desires of the community and research conducted. Regarding planning policy and process recommendations, the recommended modifications to the Land Development Code (LDC) were not incorporated. Such recommendations include: adjusting the two habitable floors over parking requirement, relief from on-site parking requirements, and relief from on-site stormwater requirements. The Plan also recommends reduction of the 25-foot setback requirement on Gulf Boulevard, allowing for more flexibility for mixed-use development, and encouraging parking to locate to the rear of buildings to promote pedestrian-scale development. The community does not appear to have a strong interest in modifying the code at this point. However, in the future, the community may reconsider this decision, and the findings and

recommendations presented in this 2020 report reflect some LDC recommendations presented in the 2009 SAP. The community did express interest in streamlining the site plan approval process, which will be a consideration in this report. Regarding other recommendations such as coordination of various Special Area Plans with the City's Comprehensive Plan, it is important to confirm that the scale and type of development proposed for the area is consistent with these requirements and reflects the desires of the community.

Regarding capital improvement recommendations such as the construction of a stormwater pond in Chic-A-Si park and a joint-use central parking facility, the community has not moved forward with the implementation of these recommendations. Since this plan was developed in 2009, several parcels were developed in the Narrows, including the Splash Harbor Condos and the waterpark, which were built across the street from Chic-A-Si park. During public workshops, the need for additional parking was voiced as a continuing concern in the commercial areas. While retail business owners expressed interest in a central parking facility during stakeholder interviews, concerns over costs and funding as well as impacts to neighborhood character were voiced during the discussion. In this 2020 study, additional parking solutions are identified, which include providing metered parking and providing a two-hour parking maximum.

Recommendations such as phased streetscaping plans could provide beneficial public realm improvements for the Narrows and build a sense of place that the community expressed as a desire for the City. To help achieve that goal, a non-profit organization named IRB Action 2000, Inc. (A2K) has been working to preserve the small-town character and form of Indian Rocks Beach for over 20 years. They helped to fund the 2009 SAP and have conducted various beautification projects such as small-scale streetscaping along Gulf Boulevard in the Narrows, beach beautification projects, and park beautification projects. A2K has also been involved in projects such as the development of a historic walking tour in the City and the incorporation of placemaking signage within the City.

Additionally, the S.R. 699 (Gulf Boulevard) Drainage Improvements project is underway, which is an FDOT project that consists of drainage improvements and the undergrounding of utilities from Walsingham Road south to Park Boulevard. The project is \$11.9 million and is expected to be completed in spring 2022.<sup>x</sup> This will impact future streetscaping efforts, which must be reevaluated since the development of the 2009 SAP.

Several of the recommendations that were identified as consistent with the community's desires were incorporated into the recommendations presented in this 2020 study. For more information on the 2009 SAP, please review the Memo of Findings included in the Appendix of this report.

# 3

## Crafting a Vision for the Future



### 3.1 The Visioning Process

Developing the vision for Indian Rocks Beach and Gulf Boulevard was a multi-step process. The first step was to evaluate whether the vision presented in the 2009 SAP was one that the community was still interested in pursuing. The recommendations presented in the SAP were reevaluated as part of this analysis. Based on the input the study team received and the data gathered through the extensive existing conditions analysis, four key overarching themes were identified to summarize the information. These themes are: Economic Vitality, Community Character, Transportation and Mobility, and Quality of Life and Environmental Protection. These key themes were used to shape the vision for the City. The information gathered from the community was used to frame the context for their goals and priorities.



To address the community's values, goals and priorities, it helped to examine strategies other communities have used in similar scenarios or to tackle similar issues. The study team identified four comparable communities to Indian Rocks Beach to examine as case studies. Based on the information gathered from the case study analysis and continued input from the community, the study team identified strategies specific to Indian Rocks Beach that the community can consider to address key elements under each theme. Based on the strategies identified, the report presents guiding principles that the community could use in the implementation of its vision, and vision statements that were developed by the community to summarize their priorities and goals.

### 3.2 Comparable Community Analysis

Comparable communities were identified based on similar characteristics, socioeconomic and demographic information, and those that possess elements that the Indian Rocks Beach community has expressed desire for within the City. Comparable communities include: Anna Maria Island, Siesta Key, Dunedin, and Safety Harbor. The study team examined these comparable communities to identify strategies the City could consider to address key elements identified under each theme.

#### Anna Maria Island

During the analysis, the study team identified Anna Maria Island (AMI) in Manatee County, FL, as a comparable community to Indian Rocks Beach, based on socioeconomic data, and an examination of the community's overall character and form. AMI is a coastal beach community similar in size to Indian Rocks Beach. The median household income in 2019 was about \$59,000 in AMI, which is lower than Indian Rocks Beach, which had a

median household income of about \$77,800 in 2019. The median home value in AMI was about \$534,900 in 2019, which is higher than Indian Rocks Beach, at about \$469,000. The comparison between the two communities can be seen in **Table 3**. In AMI, the total number of households in 2019 was about 3,800, which was higher than Indian Rocks Beach, at about 2,300. The total population in 2019 was about 7,200 in AMI, which was also higher than Indian Rocks Beach, at about 4,400. The total household and population comparison between the two communities can be seen in **Table 4**.

Table 3: Indian Rocks Beach and Anna Maria Island 2019 Median Household Income and Home Value Comparison.  
Source: © Esri Community Analyst, 2019

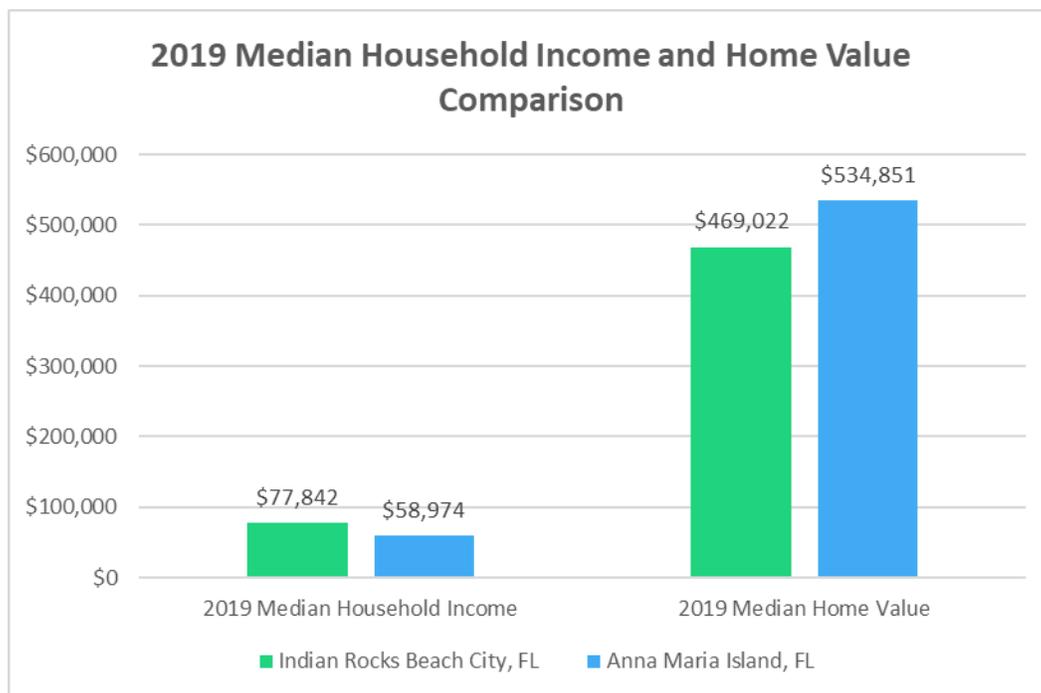
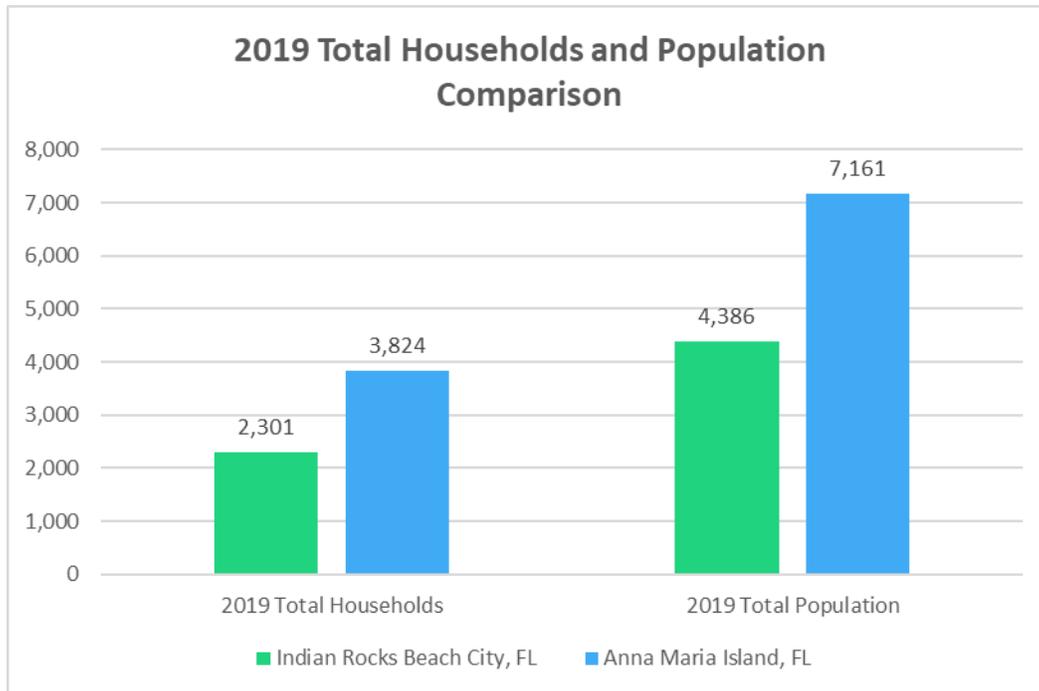


Table 4: Indian Rocks Beach and Anna Maria Island 2019 Total Households and Population Comparison.  
Source: © Esri Community Analyst, 2019



### Siesta Key

Siesta Key in Sarasota County, FL, was also identified as a comparable community to Indian Rocks Beach, through an analysis of socioeconomic data and an examination of the character and form of the community. Siesta Key is also a coastal beach community similar to Indian Rocks Beach. When comparing the 2019 median household income, home value, total households, and total population, all values were slightly higher in Siesta Key than in Indian Rocks Beach. However, Siesta Key also possesses the “Old Florida” feel that characterizes Indian Rocks Beach, and a “village” center characterized by small-scale commercial development. In Siesta Key, the 2019 median household income was about \$101,200 and the median home value was about \$664,100. The comparison between the two communities can be seen in **Table 5**. The total number of households in 2019 was about 3,700 and the total population was about 7,000, which can be seen in **Table 6**.

Table 5: Indian Rocks Beach and Siesta Key 2019 Median Household Income and Home Value Comparison.  
Source: © Esri Community Analyst, 2019

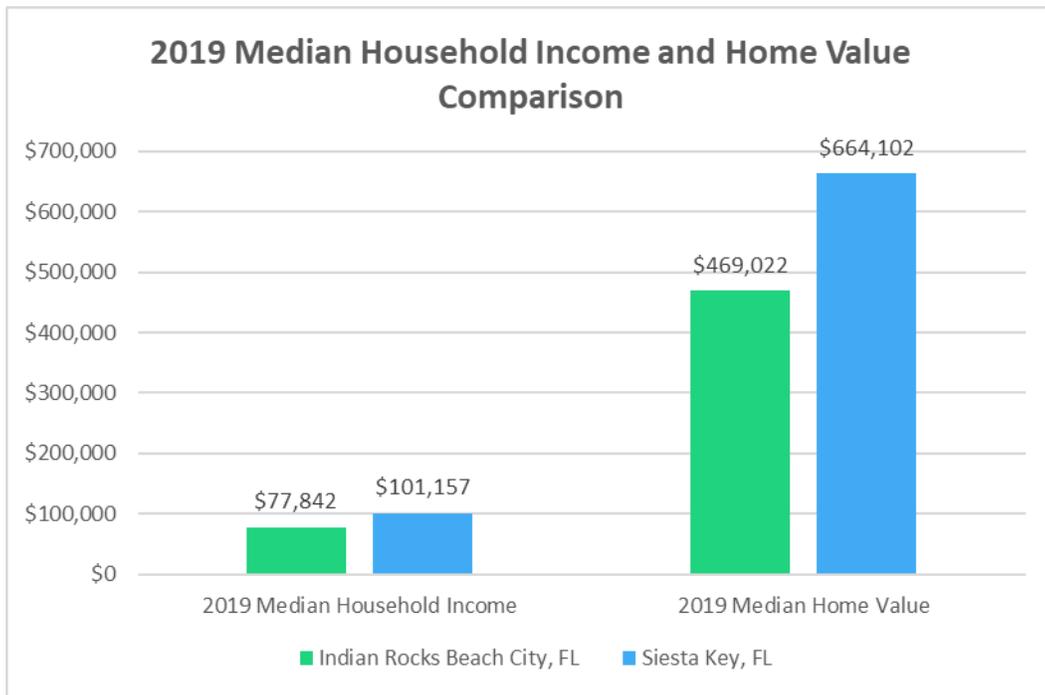
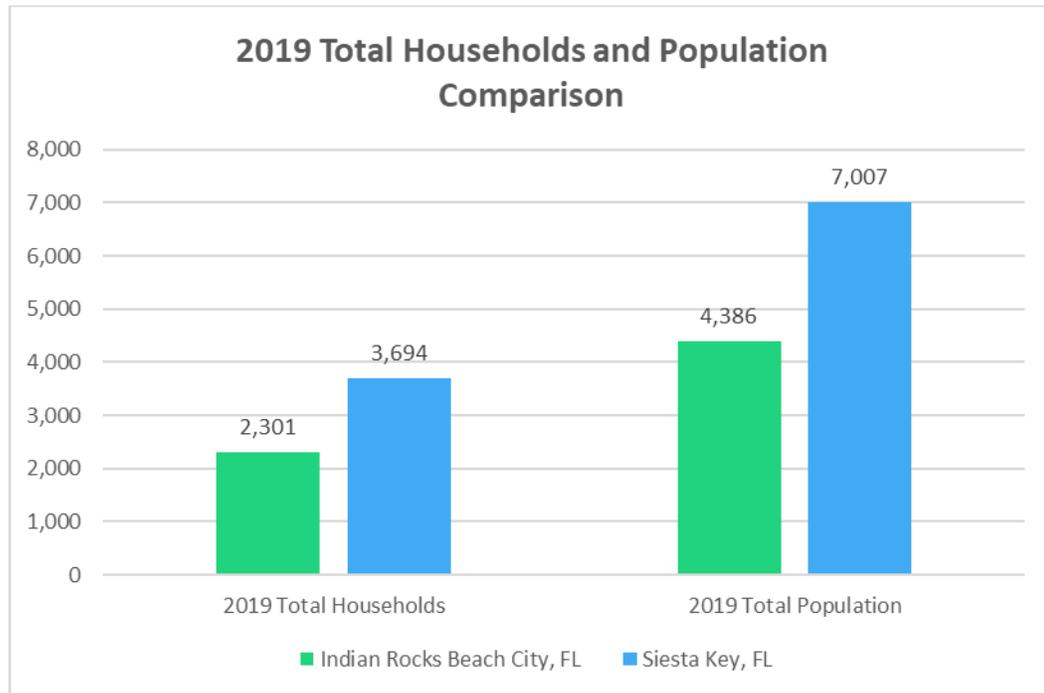


Table 6: Indian Rocks Beach and Siesta Key 2019 Total Households and Population Comparison.  
Source: © Esri Community Analyst, 2019



## Dunedin

Dunedin, in Pinellas County, FL, was also identified as a comparable community to Indian Rocks Beach, through an examination of the existing retail base that characterizes the community. When comparing the 2019 median household income and home value, the values were higher in Indian Rocks Beach than in Dunedin. In Dunedin, the 2019 median household income was about \$52,100 and the median home value was about \$226,300. The comparison between the two communities can be seen in **Table 7**. In 2019, the total number of households and total population was higher in Dunedin than in Indian Rocks Beach. Dunedin had about 18,500 total households and a total population of about 37,500, which can be seen in **Table 8**.

Table 7: Indian Rocks Beach and Dunedin 2019 Median Household Income and Home Value Comparison. Source: © Esri Community Analyst, 2019

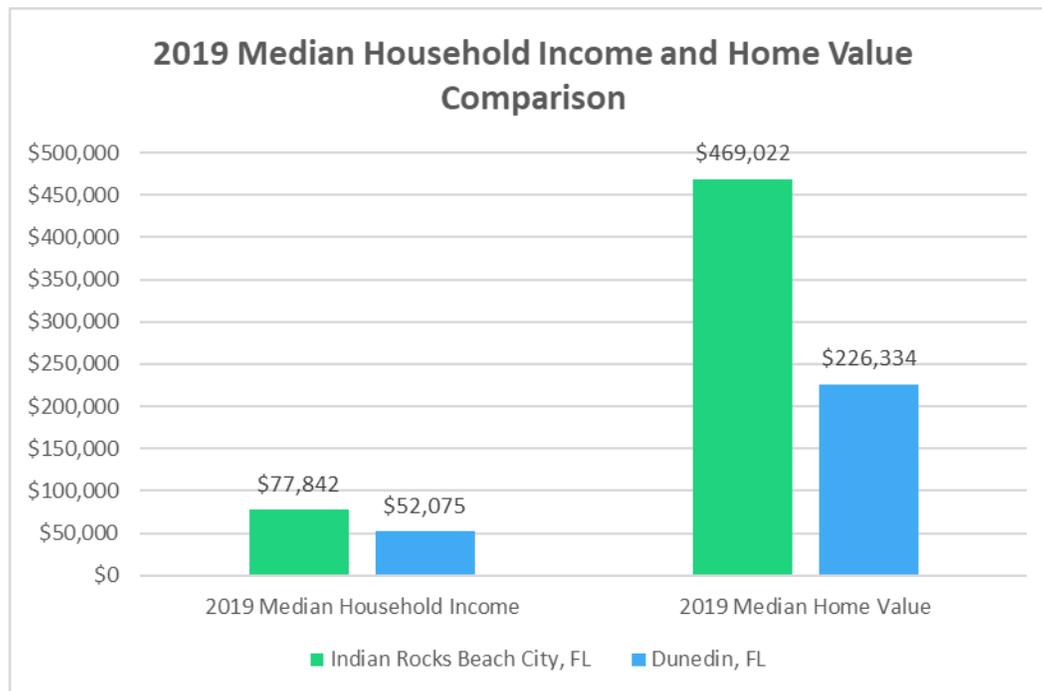
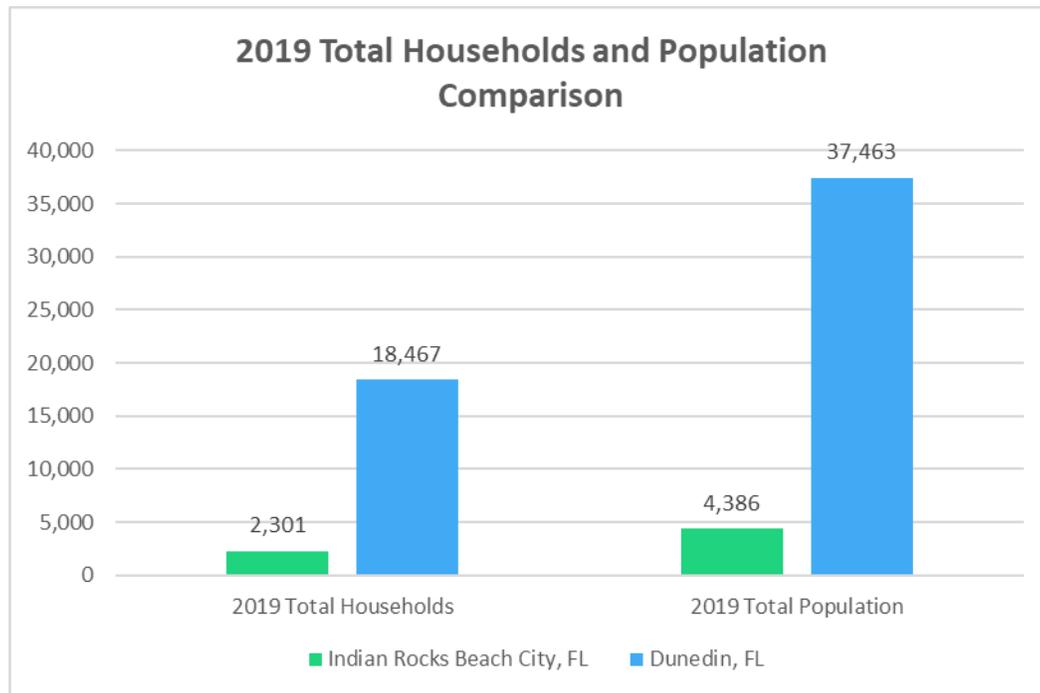


Table 8: Indian Rocks Beach and Dunedin 2019 Total Households and Population Comparison.  
Source: © Esri Community Analyst, 2019



### Safety Harbor

Safety Harbor, also located in Pinellas County, FL, was also identified as a comparable community to Indian Rocks Beach, through an analysis of socioeconomic data and an examination of the existing character and form of the community. When comparing the 2019 median household income and home value, the values were higher in Indian Rocks Beach than in Safety Harbor. In Safety Harbor, the 2019 median household income was about \$66,100 and the median home value was about \$297,100. The comparison between the two communities can be seen in **Table 9**. In 2019, the total number of households and total population was higher in Safety Harbor than in Indian Rocks Beach. Safety Harbor had about 7,500 total households and a total population of about 17,500, which can be seen in **Table 10**.

Table 9: Indian Rocks Beach and Safety Harbor 2019 Median Household Income and Home Value Comparison.  
Source: © Esri Community Analyst, 2019

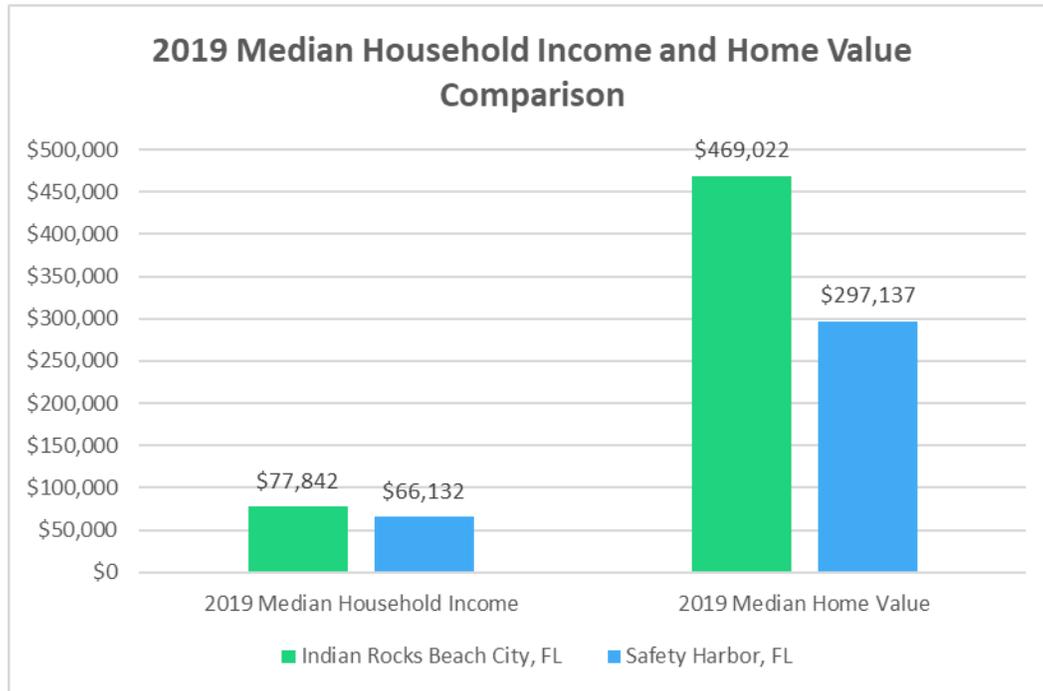
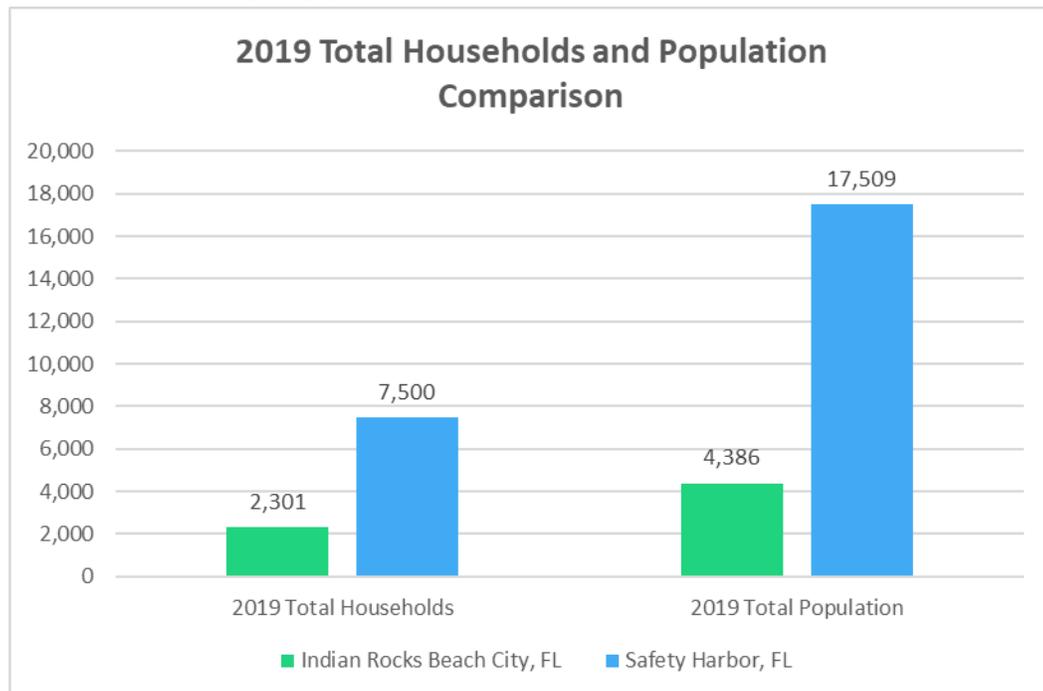


Table 10: Indian Rocks Beach and Safety Harbor 2019 Total Households and Population Comparison.  
Source: © Esri Community Analyst, 2019



### 3.3 Vision and Guiding Principles

To craft the vision and guiding principles, the study team first focused on the creation of strategies. These strategies addressed key topics from the input received from the public and data gathered by the study team and were grouped by theme. The strategies were used to develop guiding principles which the community could use in the implementation of its vision. These guiding principles were presented for feedback and input from the community at the third public workshop. At the third workshop, vision statements were developed by the community to summarize their priorities and goals as related to each theme.



## Economic Vitality



### Vision

**Promoting a vital local economy that is nourished by community support, where businesses are accessible and where visitors, residents, and business owners share a sense of belonging. In this community, we live, work, and play with the beach always in mind.**

### Guiding Principles

- 1. Encourage the success of local small businesses through the creation of commercial areas that serve as a destination for residents and visitors.**
- 2. Promote the creation of a business-friendly environment throughout the City, to foster the vitality of new and existing businesses.**

Economic Vitality encompasses the desire for a community to be financially successful, with a growing number of jobs and businesses contributing to a diverse economic base. Typically, this also refers to a community environment that is safe, has a strong sense of civic involvement, and is a vibrant and a desirable place to be.<sup>x</sup>

### What We've Learned

The study team has identified a desire to maintain local small business vitality. The community has an interest in promoting strategic small-scale commercial development that is consistent with the character and context of the community along Gulf Boulevard. Based on retail assessment data, current zoning regulations, and community interest, the Narrows was identified as the commercial area with the highest potential for future retail and small-scale mixed-use development. There were also three key uses that were identified as missing within the community: office, gourmet/healthy grocery stores, and upscale restaurants.

### Developing Strategies

The economic vitality of the community is dependent on the strategies that not only bring new businesses to the community but also provide sustainable programs that support and offer key resources to existing businesses. The top three industry sectors within Indian Rocks Beach are: Restaurants and Other Eating Places, Lessors of Real Estate, and Travel Accommodation.<sup>xi</sup> An estimated 43.3 percent of local businesses within the City have between one to four employees.<sup>xii</sup> Because many of the local businesses within the community are small, it is important to identify and eliminate any barriers to business retention and recruitment. Cities such as Dunedin have partnered with the Florida Business Incubator, which is Northern Pinellas County's educational 501c3 non-profit organization that provides informative programs and professional networking opportunities for small businesses. The organization also provides opportunities for

entrepreneurs to collaborate and share ideas, to overcome individual challenges and promote success of their businesses.<sup>xiii</sup> Other cities have used strategies to address bureaucratic hurdles. These challenges could be related to the permitting and other application processes that are required for small business start-up. Other strategies include providing businesses with support and education programs that offer tools and training they can use to grow their business.<sup>xiv</sup>

### Understanding Market Conditions

In order for the City to gain a better understanding of the retail market within the community, SB Friedman Development Advisors was selected by the City to assess the market feasibility of new retail development, using the three commercial areas that were identified in the 2009 SAP: the Uptown Commercial Area, the Midtown Commercial Area, and the Narrows. A retail inventory and profile was developed for each commercial area. The assessment also identified vacant and underutilized properties that may be susceptible to change. Additionally, Forward Pinellas identified the parcels that generate the greatest municipal taxable value per acre within the City, and in turn the greatest current return on investment for the City. These parcels are almost exclusively residential properties and are most heavily concentrated in the Sunset Bay Townhomes community and the Cove at Indian Rocks Beach, located just north of the Narrows. Additionally, Forward Pinellas calculated the redevelopment potential within Indian Rocks Beach using a ratio of a property's assessed value to the land value. The parcels that were identified as those with the highest potential for redevelopment through this analysis were also residential properties and are mostly located in the Narrows.

The retail market assessment noted that any redevelopment within the community must be focused in market realities with a market-supportable development program. In the site selection process, an appropriate site requires an owner that is interested in redevelopment, and one that meets site requirements for access, visibility, parking, zoning, and other considerations. It often requires a vision, and strong political leadership to support new development. Redevelopment must also be financially feasible and based on current market trends for rent, construction costs, land prices, etc.

In public meetings, the community expressed interest in additional restaurants within the City. The retail assessment estimated that the sales from existing restaurants within Indian Rocks Beach exceed local residential demand by \$8.5 million, indicating that the community may be oversupplied based on residential population alone. However, the Narrows could likely support more restaurant development due to the continuing trends in the local economy, driven by the growth in experiential retail and tourism in the county. The retail market assessment included an analysis of tourist demand within the City, and cited about 251 hotel rooms located there, with a higher volume located within the Narrows. This increases the demand for local restaurants, as visitors to the City are more likely to dine locally. The ability to attract consumers from outside of Indian Rocks Beach

## Case Study: Dunedin

In 2018, the City of Dunedin constructed a mixed-use building in the downtown center that consisted of 8,000 square feet of grocery space and 11,000 square feet of retail space. It also included 65 luxury apartments located above the retail. The City of Dunedin partnered with the developer to make the project happen.

The City financed public realm improvements and partnered with the developer to assemble land for the site and for the construction of the parking garage. The developer constructed the garage and the City pays for maintenance. In order to make the rent attractive to a smaller-format grocery store, the developer provided a discounted rent to the grocer for the first five years, and this reduced rent is offset by the apartment rents in the units located above the store.



Source: City of Dunedin, SB Friedman  
Development Advisors

will impact the development potential of additional restaurants. Additionally, future development will likely depend on independent restaurateur interest.

Vacation rentals also play a significant role in the local economy within Indian Rocks Beach. However, it is important to note that due to data gaps, there was not sufficient information to identify the number of vacation rental properties within the City. The City currently tracks the number of short-term vacation rentals on the east side of Gulf Boulevard, but not the west side, through an ordinance. The City currently has plans to capture the remaining number of vacation rentals on the west side of Gulf Boulevard in the Fall of 2020, which will allow it to identify their potential impact on the local economy.

The community has also expressed a desire for the incorporation of a smaller format gourmet grocery store, such as a Fresh Market or Trader Joe's. The closest grocers are located on mainland Pinellas County. Based on the retail market assessment, there is about \$16.1 million in annual total grocery demand in the City overall, including \$15.1 million in unmet residential grocery demand. This is assuming that residents within the City are willing to drive more than three minutes to shop locally on the barrier islands. Smaller-format grocery stores typically generate annual sales volumes of over \$12 million. Grocery demand within IRB is greater than the typical smaller-format grocer sales requirements, indicating that there may be adequate demand for this type of grocery store. A smaller-format grocer would need to capture about 70 to 80 percent of the existing grocery demand for the business to be successful. The Narrows and Uptown were identified as areas with the highest potential for the future location of a smaller-format grocer, based on the amount of available land.

To address the desire of the community to encourage the success of local businesses and promote the economic vitality of the City, it is important to consider the input received as related to the vision. The community has expressed the desire for additional local-serving retail, and it is important to note the current market conditions when planning for the future.

## Community Character



### Vision

**Preserving the City’s small-town atmosphere and providing a walkable community while encouraging small-scale strategic development and promoting our “Old Florida” feel through the preservation of the community’s historic resources.**

### Guiding Principles

- 1. Preserve the existing character and form of the community while encouraging strategic, small-scale commercial development and redevelopment.**
- 2. Maintain the identity of the community through the preservation of the community’s historic resources.**
- 3. Maintain the “Old Florida” feel in the community through the incorporation of public art and streetscaping.**

Community character refers to the character and form of the community- the architecture, the feel, and the vibe. Defining community character is how the community expresses the way they would like their community to look in the future.

### What We’ve Learned

When considering community character, the study team has identified a desire to preserve the existing character and form of the community while promoting small-scale strategic development. There is also an interest in preserving historic resources within the community, such as the historic beach cottages. The community also expressed that mixed-use development may be applicable in certain areas of the community, depending on the context. Areas of note include the Narrows and Uptown. The community also has a desire to maintain the current height restrictions in the LDC and would like to incorporate public art to help reinforce its “identity.”

### Developing Strategies

The character of the community within Indian Rocks Beach is unique and special to its residents and visitors. In meetings with stakeholders and workshops with the public, the City expressed interest in preserving the character of the community, while creating commercial nodes that promote small-scale strategic development. Creating a successful small-scale commercial node has various elements that make it a desirable place to be. Many of the elements that create this environment are regulated within the community’s LDC. Elements such as the incorporation of public realm improvements like sidewalk cafes, streetscaping, and pedestrian design are created through strategic incorporation of items such as reduced setback requirements and adjusted parking standards.

### Case Study: Bradenton Beach

The development in the City of Bradenton Beach is of similar type and scale to Indian Rocks Beach. When examining the zoning regulations in the Bradenton Beach, a community on Anna Maria Island, the stringent height restrictions have preserved the “Old Florida” feel that also characterizes Indian Rocks Beach. The City of Bradenton Beach has created a mixed-use downtown area through implementation of a mixed-use bridge commercial overlay district in their land development code, which removes the front and side setback requirements for parcels abutting Bridge Street (the City’s main commercial node), encouraging pedestrian-scale development. The overlay district also sets additional requirements for mixed-use, such as increasing the maximum habitable stories from two to three, with commercial uses allowed on all three habitable levels, however residential uses are only allowed on the second and third levels.



### Promoting Community Character

One way to create a small-scale commercial node that allows for a combination of land uses within one area is through the incorporation of mixed-use development. Mixed-use development offers a variety of benefits, including reducing dependency on vehicular travel, helping to build the “identity” of the community, and creating a vibrant commercial area that offers options to residents and visitors. The community has identified an interest in mixed-use development, however, only in certain contexts. According to the retail market assessment, mixed use development may be possible, depending on the ability to identify a site, the interest of the tenant or owner, and whether it is financially feasible. The retail market assessment identified the Narrows as having medium to higher potential for mixed-use development based on conversations with existing owners, and Uptown as lower to medium potential for mixed-use development.

Indian Rocks Beach currently has a business district triangle overlay zone in the Narrows that is meant to encourage new development and redevelopment within it. The overlay zone changes the current front yard setback requirements to ten feet and sets a ten-foot minimum setback on other property boundaries abutting a right-of-way, with any remaining setbacks of five feet. Additionally, parking requirements are ten percent less than what is currently required under the LDC. As part of the requirements established within the overlay zone, additional elements could be included to encourage a pedestrian-scale environment, such as waiving setback requirements completely, adjusting the parking standards even further to make more efficient use of limited land area, encouraging parking to locate to the rear of buildings or offsite and modifying shared-parking standards to make them more flexible and easy to understand.

In communities such as the City of Bradenton Beach and Siesta Key, overlay districts were created that remove setback requirements.<sup>xv</sup> The Siesta Key overlay district was established to create a pedestrian-friendly

environment within the Village. It promotes the incorporation of public realm enhancements such as awnings and canopies that provide protection from the elements, requires the setback and covering of waste containers, and establishes basic design standards such as requirements for signage to keep within the character and form of the community, establishes maximum height for walls, and establishes requirements for painting and landscaping. The overlay district also establishes standards for the use of shell parking lots instead of asphalt, which reduces the amount of impervious surface and aids in the mitigation of stormwater.<sup>xvi</sup>

Beyond the establishment of requirements within the LDC that reflect the community's desire to create a small-scale commercial environment, the City can also work with developers to create the environment that the community envisions. During the site plan approval process, the City can work with the developer of a site to adjust for desired elements. The City of Safety Harbor recently constructed a new mixed-use building downtown, and the City worked directly with the developer to include elements that the community was looking for. The project features two buildings, one with residential use, and one with office and retail use. The residential building includes 24 dwelling units, and the commercial building features 24,000 square feet of retail and office space. The project includes on-street parking, various pedestrian access points, and elements such as awnings, windows, interior parking, and façade articulation that help the building fit within the character of the surrounding area. The community also wanted the incorporation of a ridesharing stop, a transit stop, and bike parking, which the developer included as part of the site plan approval process. The approval process was also streamlined to facilitate the project more quickly. The site plan and project photos can be seen in **Figure 7**.

### Case Study: Safety Harbor

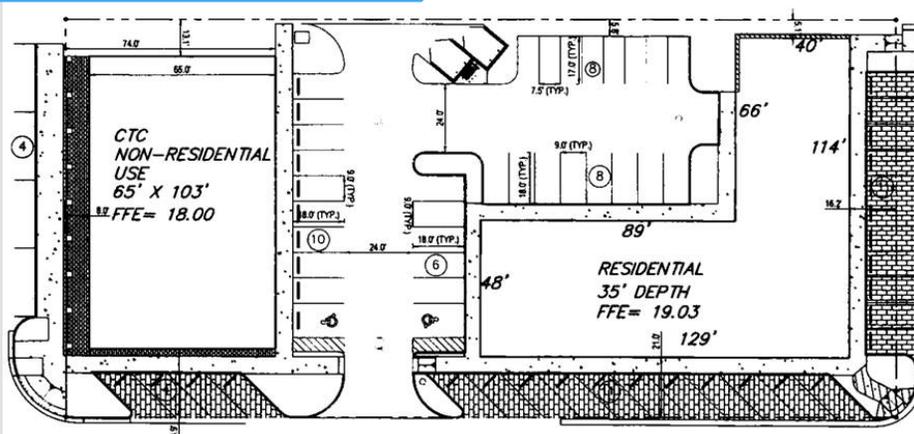


Figure 7: (Above Center) Site plan for the mixed-use project in Safety Harbor, (Above Right and Below Right) Photos of the mixed-use project in Safety Harbor.  
Source: City of Safety Harbor.

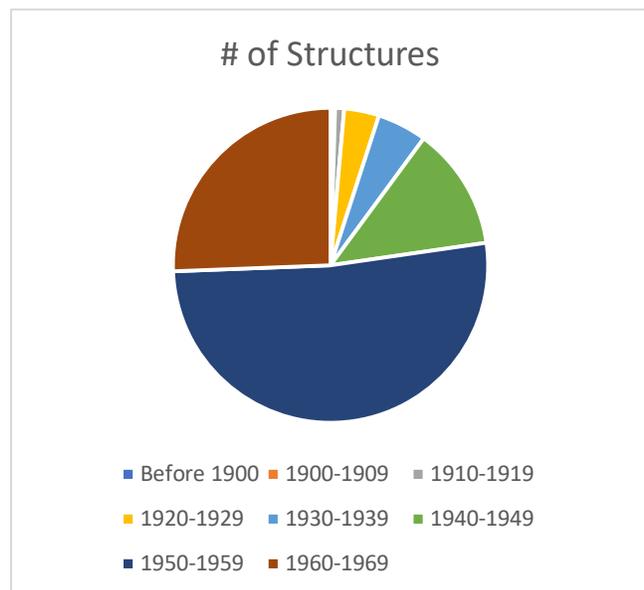
### Historic Preservation

The community has also expressed a vested interest in historic preservation. A historic structure or site is one that has a special historic or aesthetic interest or value that characterizes one or more periods or styles of architecture representative of a certain time in history. In meetings with the public, the community expressed a desire to preserve and protect resources within the community such as the historic beach cottages.

The study team conducted an analysis to identify the number and location of historic structures within the City. The analysis was based on the number of structures that were built before 1970. Based on the analysis, there are about 863 structures in Indian Rocks Beach, as seen in **Table 11**. It is important to note that this data is very preliminary and may have gaps. However, it provides a general picture of the overall context of Indian Rocks Beach. The locations of historic structures can be seen in **Figure 8**.

*Table 11: Number of Historic Structures by Decade within Indian Rocks Beach*  
 Source: Pinellas County Property Appraiser, Pinellas County Planning Department, Forward Pinellas, Florida Division of Historic Resources, Florida Master Site File, 2019. **Note: Data is estimated and may not be accurate due to gaps**

Decade	# of Structures
Before 1900	1
1900-1909	3
1910-1919	8
1920-1929	31
1930-1939	44
1940-1949	109
1950-1959	446
1960-1969	221
<b>Total</b>	<b>863</b>



# Historic Structures in Indian Rocks Beach



Figure 8: Historic Structures in Indian Rocks Beach  
 Source: Pinellas County Property Appraiser, Pinellas County Planning Department, Forward Pinellas, Florida Division of Historic Resources, Florida Master Site File, 2019. **Note: Data is estimated and may not be accurate due to gaps**

To address historic preservation within communities, there are various strategies that communities have used to ensure these resources are protected. One strategy is to establish a historic preservation program. If a community elects to create a historic preservation program, it is recommended that the community ensure the program is consistent with the Division of Historic Resources Certified Local Government Guidelines so that the City can access competitive state level funding that is granted to communities to aid in carrying out the program. Pinellas County, Anna Maria Island, and Sarasota County are examples of communities that have created a Certified Local Government Program that embodies the public policy for historic preservation and establishes a historic preservation board to oversee the program. The program provides training opportunities and resources to local governments established as a CLG. <sup>xvii</sup>

A community can also consider the creation of a local historic district designated by a local ordinance. It is typically “overlaid” onto the community’s existing zoning districts. The local jurisdiction commission or council establishes requirements for the appearance of structures within the district. The historic district provides a mechanism for communities to ensure that any future development or change to existing buildings within the district occur in a manner that respects the important architectural, historical, and environmental characteristics within the district. Local designation of the district encourages compatible development within it and discourages changes that are inconsistent with the districts’ requirements. This happens through a regulatory process which involves the historic preservation commission or board reviewing and approving or denying major changes that are proposed for buildings within the district and, if a change is approved, issues Certificates of Appropriateness which allow the proposed changes to take place.

A historic district is established through the following process: the community conducts a “pre-designation survey” of the City or specific area within the City; the community adopts a historic preservation ordinance, and the community amends its comprehensive plan and adds a Historic Preservation Element. The historic preservation ordinance established by the community typically includes ten basic elements:

- a. A statement of purpose for the historic preservation ordinance
- b. A statement of the powers and authorities established within the ordinance
- c. Establish a Historic Preservation Commission or Board
- d. Establish criteria for the designation of historic landmarks, properties, and/or historic districts
- e. Establish procedures/criteria for identification and designation of landmarks
- f. Establish the types of actions that can be reviewed by the commission or board and the legal effect of the review
- g. Establish criteria to be applied by the commission or board during review for changes within the district
- h. Consideration of the economic impact of designation or review of an action

- i. Establish a process for appeals from a commission or board decision
- j. Establish fines/penalties for violations of provisions within the ordinance<sup>xviii</sup>

In Sarasota County, the community has established a historic preservation overlay district that includes provisions that allow for qualifying historic buildings to be used for additional uses. It also allows for added flexibility for those buildings. To qualify a property for inclusion within the overlay district, the property's application must demonstrate that it meets the identified requirements that are outlined in the LDC. The county's Historic Preservation Officer will make a determination as to whether the property qualifies to be included in the historic preservation overlay district. The district allows for retail and service uses, and any special exception use allowed in the underlying zoning district.<sup>xix</sup> It is important to note, however, that the creation of a historic district can also have economic repercussions that may dissuade the community from use of this strategy. Because the historic resources within the City are privately owned, the financial burden to maintain these resources to the standard established by the City and associated potential tax increases could cause challenges to property owners.

Other strategies that communities have used to encourage historic preservation include less onerous modifications to the LDC, that when implemented, promote the preservation of historic resources. Providing flexibility of parking standards, for example, not only creates a walkable downtown environment, it also removes the burden for historic sites, which are often located on small parcels, to meet the required off-street parking requirements within the community. Additionally, removal of setback requirements can provide for more flexibility in the design of a building that would increase the viability of use of the City's existing historic structures, rather than an incentive to demolish them and rebuild the site.<sup>xx</sup>

Other strategies include the incorporation of architectural design standards with provisions for historic buildings that result in the maintenance of building elements that contribute to the character of the district. Renovating a historic structure should take place in a way that any non-historic additions or changes to the structure can be removed, and restoration of the original elements of the building should be encouraged. In addition to regulatory-based strategies for historic preservation, there are also incentive-based strategies that can be used as well. Incentives include encouraging the remodeling of existing structures through the waiving of fees, and the offering of tax incentives. Some of these incentive programs require a property to be included in the National Register of Historic Places or be included in a list of historic sites at the state or local level.<sup>xxi</sup>

Another popular historic preservation strategy is the use of tax credits. The Federal Rehabilitation Tax Credit, also known as the Historic Tax Credit, for example, is a tool that provides an income tax credit of up to 20 percent to developers of properties that are identified for retail, office, and rental uses. The tax credit has preserved more than 42,000 historic buildings nationwide. In order to qualify for this tax credit, the National Park

Service (NPS) must certify the building as a historic structure and must determine if the work meets the “Secretary of Interior’s Standards for Rehabilitation.”<sup>xxii</sup>

Other incentives include a tax benefit for Historic Preservation Easements, which is “a voluntary legal agreement, typically in the form of a deed, which permanently protects a significant historic property.”<sup>xxiii</sup>

The easement places restrictions on development on the property to protect the historic character of the building. These restrictions are transferred to an organization whose responsibility it is to maintain the property and protect it, and that has the resources to do so. The property owner may qualify for a deduction on Federal income taxes for the monetary value of the easement. Additional tax benefits may be applicable as well, however the property owner should seek legal and financial consultation to determine the benefits applicable to them.<sup>xxiv</sup>



When considering the restoration and maintenance of historic structures, a major concern in Indian Rocks Beach is over the Federal Emergency Management Agency’s (FEMA) National Flood Insurance Program (NFIP) requirements. The City of Indian Rocks Beach is in a Coastal High Hazard Area (CHHA) as established by a Sea, Lake, and Overland Surges from Hurricanes (SLOSH) computerized storm surge model. The City is also in a Special Flood Hazard Area as designated by the Federal Emergency Management Agency (FEMA), which means all parcels are required to have a flood insurance policy, and any new construction must be elevated above Base Flood Elevation (BFE) to receive flood insurance.

The NFIP provides affordable insurance by urging communities to adopt regulations for floodplain management. This reduces the economic impact to communities after they are hit with a natural or manmade disaster. According to FEMA, a historic structure is defined as one that is: “(a) Listed individually in the National Register of Historic Places or preliminarily determined as meeting the requirements for individual listing on the National Register; (b) Certified or preliminarily determined as contributing to the historical significance of a registered historic district; (c) Individually listed on a state inventory of historic places; or (d) Individually listed on a local inventory of historic places.”<sup>xxv</sup> The state’s historic preservation office or a local historic preservation board that is federally-certified should be involved in the process to determine if a building identified for a historic exemption is a historic structure.<sup>xxvi</sup>

Under the NFIP, if a property owner would like to make improvements or needs to make repairs to a property located in a floodplain, a “50 Percent Rule” applies. This rule means that if the cost of the improvements or repairs to the property are more than 50 percent of the total value of the property (known as a “substantial improvement”), the property

must meet current floodplain management requirements. Historic structures are considered exempt from the “substantial improvement requirements” under the NFIP, as long as they meet the following criteria: “1. The building must be a bona fide ‘historic structure.’ 2. The project must maintain the historic status of the structure. 3. Take all possible flood damage reduction measures.”<sup>xxvii</sup> Any exceptions granted can be done so through an administrative process, if the NFIP definition of “substantial improvement” and “historic structure” are listed in a community’s local ordinance. Exceptions can also be granted through a variance process.<sup>xxviii</sup> For more information, FEMA has developed a guidance document that provides an overview of how the NFIP applies to Historic Structures: *National Flood Insurance Program (NFIP) Floodplain Management Bulletin Historic Structures*. You can also call or email the Office of Environmental Planning and Historic Preservation helpline at 866-222-3580, or [ehhelpline@dhs.gov](mailto:ehhelpline@dhs.gov).<sup>xxix</sup>



## Scenario Development

As part of the analysis, the study team worked with the property owner of Crabby Bill's, a restaurant located within Indian Rocks Beach, on the development of a conceptual site plan for his site located within the Narrows. A consultant, Kimley-Horn, was selected to aid in the development of the site plan scenario. The conceptual site plan is meant to serve as an illustrative scenario example of the type of mixed-use development project that could be constructed in the Narrows, with a willing property owner and an approved project from the City.

### Context

The Crabby Bill's site is located at 401 Gulf Boulevard and 404/412 First Street, as shown in **Figure 9**. It is about 1.8 acres and is located within the business triangle overlay district. Currently, the site holds a large restaurant, Crabby Bill's, and additional commercial spaces. The site is across the street from a beach access point, which makes it a desirable location for tourists. Due to its proximity to the beach, the site is prime real estate for hotel or short-term vacation rentals.



Figure 9: Crabby Bill's Site Location within Indian Rocks Beach. Source: Kimley-Horn

The current land development regulations for the Crabby Bill's site are shown in **Table 12**. The site is currently in the business (B) zoning district and the business triangle overlay zone. The Future Land Use category is Retail and Services. Existing multi-modal facilities include a bus stop located 100 feet south on the corner of Gulf Boulevard and 4<sup>th</sup> Avenue N., and a bike lane on Gulf Boulevard. There is parking located in the front, rear and side of the existing building.



Crabby Bill's Restaurant Site in Indian Rocks Beach.  
Source: © Google Street View



Crabby Bill's Restaurant Site parking lot

Table 12: Indian Rocks Beach Land Development Regulations Applicable to the Crabby Bill's Site.

	Min.	Max.
Front Setback	10 ft	-
Side Setback (abutting right-of-way)	10 ft	-
All Other Setbacks	5 ft	-
FAR	-	.55
Building Height	-	35 ft** (max. height of pilings = 10 ft, max. height of building above pilings = 25 ft)
Impervious Surface Ratio	-	.70
Outdoor Seating	3 ft. from curb	-
Vehicle Parking (does not include shared parking for mixed-use developments)	<ul style="list-style-type: none"> <li>• Restaurant: 1 space/60 SF of floor area</li> <li>• Restaurant: 1 space/80 linear inches of bench area</li> <li>• Hotel/motel/Short-term Rental: 1 space/unit + 1 space/each 5 units</li> <li>• Multi-family: 2 spaces/unit</li> <li>• Other: 1 space/each 250 SF</li> <li>• 10% reduction credit for Business Triangle Overlay Zone</li> <li>• Off-site parking spaces can account for up to 50% of required parking spaces within 1,500 ft of the site</li> </ul>	-
Bicycle Parking	5 spots/free standing building	-

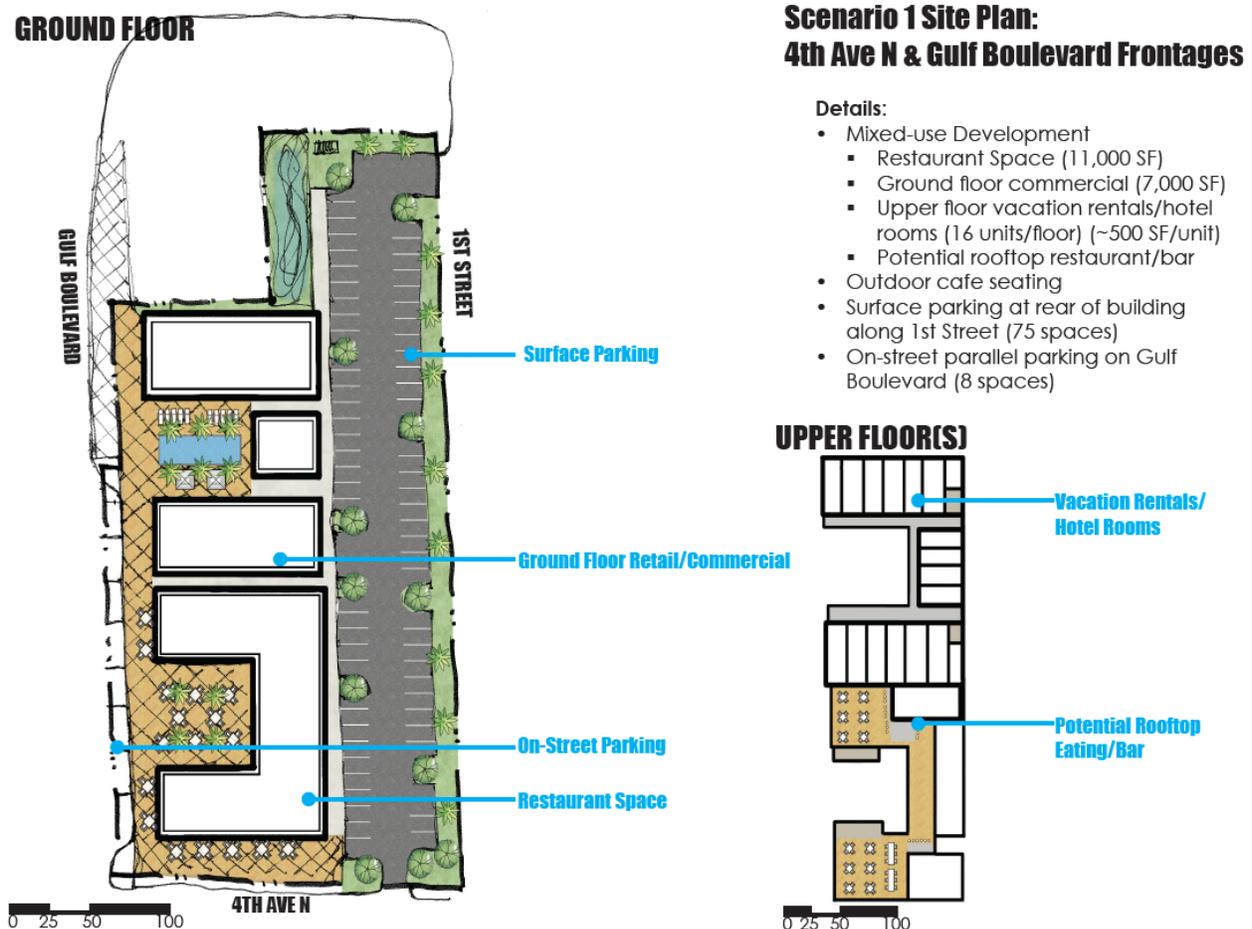
*\*\*It is important to note that the City also has a Planned Development District (PDD) that can only be applied to properties located in the business triangle overlay zone that allows for a maximum building height of 50 feet, however there are currently no parcels zoned PDD.*

*Source: City of Indian Rocks Beach Land Development Code.*

## Conceptual Design

To fully utilize the attractive characteristics of the site, the new conceptual site plan includes a restaurant space with added amenities, ground floor commercial/retail, and short-term vacation rentals. The restaurant space shown in the site plan is envisioned to be around 11,000 square feet (includes the kitchen and service areas) with the potential for an upper level, rooftop bar and eating space. The restaurant space features an outdoor courtyard restaurant seating as well as café seating along the sidewalks on Gulf Boulevard and 4th Avenue N. There is 7,000 square feet of ground floor commercial space adjacent to the restaurant space. The ground floor commercial space also has an outdoor courtyard with a pool to serve the vacation rentals/hotel units on the upper floor(s). Above the commercial space are 16 vacation rentals/hotel units. There is

potential for additional floors of vacation rentals/hotel units but is limited by on-site parking requirements. The parking for the site is located at the rear of the property to maintain and active street edge along Gulf Boulevard. The proposed site plan has 75 surface parking spaces and 8 on-street parking spaces totaling 83 parking spaces for the site. The intent was to provide on-site parking comparable with existing parking. Under parking standards for the business district, this does not meet the required number of spaces. The current parking standards require 202 spaces for shared-use developments, including the 10 percent business triangle overlay district reduction. The intention of this development is to utilize off-site parking to meet parking requirements, which is currently allowed within 1,500 feet of the property as stated in the Land Development Code. To comply with Federal Emergency Management Agency (FEMA) requirements, the structure will be properly “floodproofed” using methods such as those illustrated in the Quality of Life and Environmental Protection section of this report, ensuring that they comply with FEMA’s requirements for floodproofing.<sup>xxx</sup> To meet stormwater requirements, there is a retention pond located on-site. The conceptual site plan scenario is shown in **Figure 10**. A sketch of the conceptual site plan is shown in **Figure 11**.



**Scenario 1 Site Plan:  
 4th Ave N & Gulf Boulevard Frontages**

- Details:**
- Mixed-use Development
    - Restaurant Space (11,000 SF)
    - Ground floor commercial (7,000 SF)
    - Upper floor vacation rentals/hotel rooms (16 units/floor) (~500 SF/unit)
    - Potential rooftop restaurant/bar
  - Outdoor cafe seating
  - Surface parking at rear of building along 1st Street (75 spaces)
  - On-street parallel parking on Gulf Boulevard (8 spaces)

Figure 10: Conceptual Site Plan Scenario for the Crabby Bill's Site in Indian Rocks Beach.  
 Source: Kimley-Horn

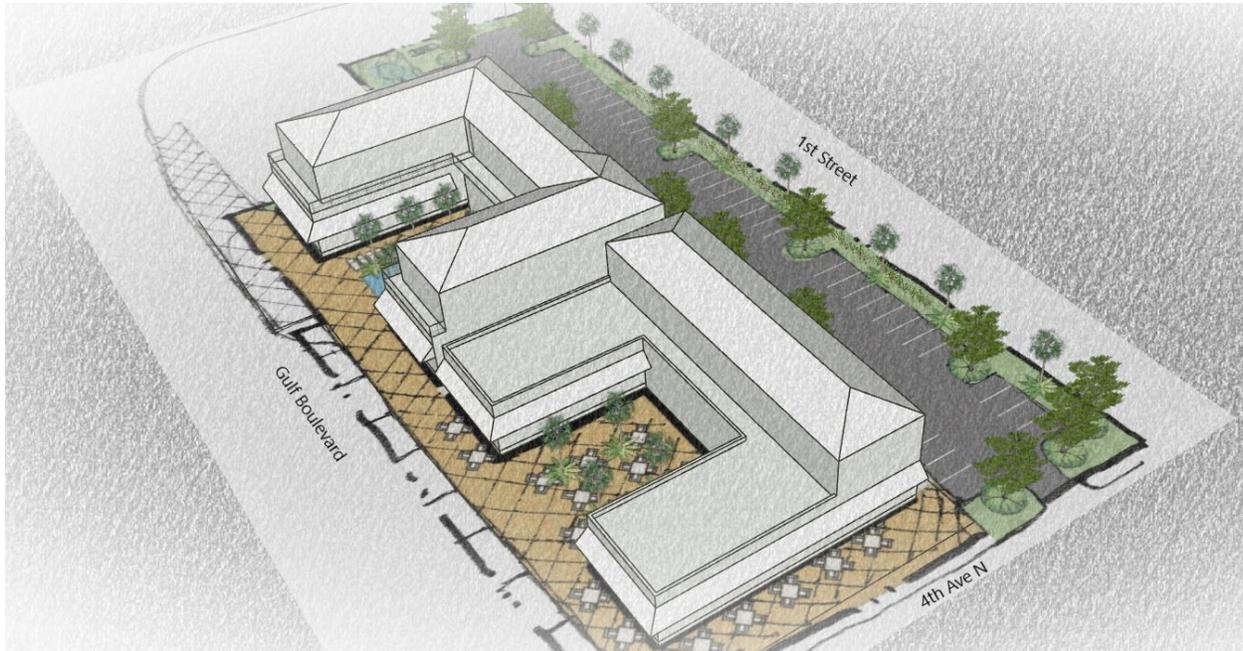


Figure 11: Conceptual Site Plan Sketch for the Crabby Bill's Site in Indian Rocks Beach.  
Source: Kimley-Horn

### Land Development Code

Upon closer examination of the LDC within Indian Rocks Beach, the study team identified some constraints to the incorporation of a cohesive village center within the community. One element that could restrict the creation of this environment is the required parking minimums within the community. The on-site parking requirements constrain the amount of development that can locate on a site, preventing pedestrian scale development. Additionally, the maximum floor area ratio of .55 inhibits development as well.

To reduce constraints, the City could update the LDC to provide clarity. The LDC does not currently provide a clear cross-reference between the Business Zoning District and business district triangle overlay zone. Doing so could help to alleviate some confusion

### **Examples/Inspiration:**



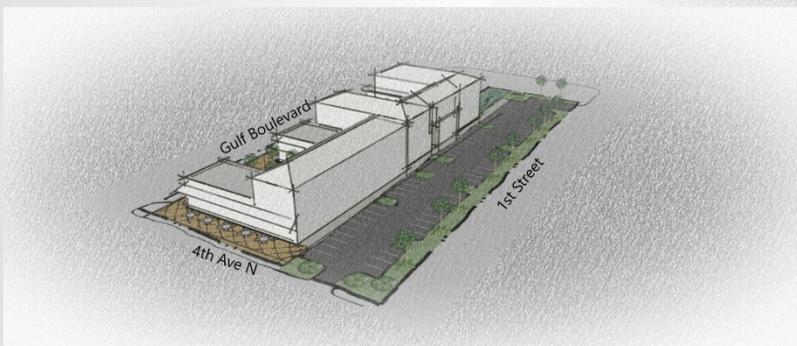
Examples and Inspiration for the Conceptual Site Plan Scenario and Sketch.

Source: Kimley-Horn

on allowable height and setback requirements. The City could also consider developing an overall summary table of zoning districts that includes allowable uses, setbacks, and heights.

Regarding parking requirements, the shared-parking matrix for mixed-use development is subject to multiple interpretations, which can inhibit projects during the site plan development process because of the lack of clear understanding of requirements. The City could update required parking standards and simplify the shared parking matrix and could consider using the Urban Land Institute/Institute of Transportation Engineers parking shared matrix standards. The off-site parking requirements are also limiting, as they require that off-site parking be located within 1,500 feet of the site. The City could also provide clarity on the number of parking spaces required as identified by use, particularly the restaurant uses. Currently the standards mention 1 space/60 square feet of floor area and 1 space/80 linear inches of bench area. The City could also allow for more flexibility in the parking standards by allowing adjacent on-street parking spaces to count towards on-site parking requirements.

To address the desire of the community to preserve its existing character and form while promoting strategic, small-scale development, the community could consider incorporating changes to the LDC that will not only promote a more pedestrian scale environment but can also preserve historic resources. Additionally, there are many strategies the community can use to achieve their goals related to community character and form. The community will need to determine the best course of action to implement its vision moving forward.



*Additional Sketches for the Conceptual Site Plan Scenario for the Crabby Bill's Site in Indian Rocks Beach.  
Source: Kimley-Horn*

## Transportation and Mobility



### Vision

**Continuously striving for the creation of a congestion-free, walkable, bikeable community that promotes and values the safety of all road users.**

### Guiding Principles

- 1. Develop a transportation network that enhances mobility options and accessibility of all users and promotes congestion reduction.**
- 2. Foster a safe walkable and bikeable environment that improves the community's health and wellbeing, while encouraging multimodal transportation.**
- 3. Provide transportation options that are convenient and affordable and scaled to the community's needs.**

Transportation and Mobility encompasses the desire for the community to have an integrated transportation network that provides adequate connectivity and enhances mobility within the community.

### What We've Learned

Regarding transportation and mobility, the community has expressed concerns over traffic congestion and reduced visibility along Gulf Boulevard. Visibility concerns were identified as vehicles turn onto Gulf Boulevard from side streets, and at crosswalks. Parking was also identified as a need in commercial areas.

### Developing Strategies

Indian Rocks Beach is a small beach community that is a destination for residents and visitors. It is important to the community that it remains a safe place that can be easily accessed through multiple modes of transportation. The essence of the small-town beach community environment is one that is walkable and bikeable. The creation of a pedestrian-friendly community not only promotes overall health and wellbeing, it improves connectivity and can reduce congestion.

### Transportation Statistics

Indian Rocks Beach has two highway facilities that provide access to the City: Gulf Boulevard (S.R. 699), providing north/south access, and Walsingham Road (S.R. 688), providing east/west access. Gulf Boulevard is a two-lane roadway with a middle turn lane from 28<sup>th</sup> Avenue south to 5<sup>th</sup> Avenue and is managed by Pinellas County. From 5<sup>th</sup> Avenue (Walsingham Road) south to the City's southern limits, Gulf Boulevard is a two-lane roadway and is managed by the Florida Department of Transportation (FDOT). Walsingham Road ranges from four lanes to three lanes along the Indian Rocks Causeway Bridge into the City. The remaining streets within the community are local

streets. The Indian Rocks Beach community has identified concerns over traffic congestion on Gulf Boulevard and the Belleair Causeway. To examine the current performance of the roadway network within the City, the study team examined level of service (LOS) indicators. One of the indicators used is volume to capacity ratio (v/c) which identifies the ratio between a roadway's current demand and its capacity. Between 2010 and 2019, the segments of Gulf Boulevard that are within the limits of the City of Indian Rocks Beach were identified as deficient based on a level of service analysis. In 2010 and 2019, it was identified as operating at an LOS D and F. Additionally, the Belleair Causeway was operating at an LOS F, and the 2019 LOS map can be seen in **Figure 12**.

Year 2019 Level of Service – Existing Conditions

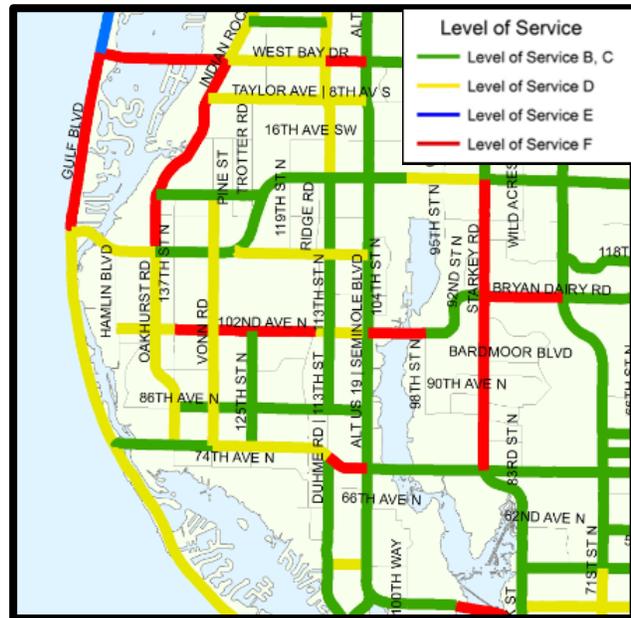


Figure 12: 2019 Level of Service - Existing Conditions PM Peak Direction 2018 Base Data.  
Source: Forward Pinellas, Florida Department of Transportation (FDOT)

### Reducing Congestion

There are strategies that the community could consider that would not only potentially reduce congestion but would improve safety overall. It is important to note that the incorporation of some of these strategies may be costly, however, may provide a valuable return on investment through the reduction in overall congestion and the increase in safety. The community has expressed an interest in exploring the option of providing a free circulator service within the community, particularly in the Narrows. This option would potentially reduce parking needs and reduce congestion. For example, Anna Maria Island offers a free circulator trolley service that is operated by Manatee County Area Transit (MCAT) and provides access to the various commercial nodes along the Gulf Drive corridor, including Bridge Street in Bradenton Beach.<sup>xxx</sup> The service is similar to that provided by the Jolley Trolley, but free of charge. Siesta Key also has a similar free trolley service that is operated by Sarasota County Area Transit (SCAT), and smaller free ride services are offered throughout the community.

Additionally, Indian Rocks Beach could also explore working with the Pinellas Suncoast Transit Authority to provide some sort of park-n-ride service to the beaches from the mainland. It is important to note that this service may be costly, but other communities are incorporating similar services as well. Manatee County Area Transit (MCAT) launched its Beach ConneXtion Shuttle on December 7, 2019, to improve access to the beaches

on Anna Maria Island and reduce congestion. It provides park-n-ride service from the mainland to the beach during peak season. The service connects with the free trolley to provide additional access to the island. The service will receive half of the funding needed from FDOT over a three-year period, and Manatee County will be paying \$26,500 for the service annually.<sup>xxxii</sup>

Other strategies that the community could consider include the incorporation of curb space for rideshare services, which also reduces parking needs, similar to the mixed-use project in downtown Safety Harbor. The community could also create an e-scooter policy, similar to those established by the City of St. Petersburg and the City of Tampa.

### Improving Safety

The community has also identified concern over visibility and safety within the community, particularly bicycle and pedestrian safety. Visibility concerns relate to access from side streets along Gulf Boulevard, as well as visibility at crosswalks for both pedestrians and drivers. There are several strategies to improve visibility, such as the reduction of the height of vegetation that may inhibit visibility, and the improvement of both pedestrian scale and overhead lighting.



Based on the five-year traffic crash averages for the 2008-2018-decade, Indian Rocks Beach saw a decrease of traffic crashes by about 3 percent. Traffic crashes, however, continue to be concentrated in the business triangle located on Gulf Boulevard between 4th and 5th Avenue. The community has expressed concerns over bicycle and pedestrian safety within the City. From 2014 to 2018, 10 bicycle and 4 pedestrian crashes occurred within the City. **Figure 13** shows the location and type of crashes within the community based on the five-year traffic crash averages for the 2008-2018-decade.

Additional safety concerns with Indian Rocks Beach include sidewalk accessibility in the commercial areas. The City can consider incorporation of pedestrian enhancements such as sidewalks within the commercial areas as needed to address gaps and to provide enhanced multimodal connectivity.

Transit ridership within the City is most concentrated in the business triangle, as can be seen in **Figure 14**, which shows the average total daily ridership (combined on boardings and off boardings) at each stop from February to June 2019.

To address bicycle and pedestrian safety, the community has identified a commitment to maintaining a 30-mph speed limit on Gulf Boulevard. The community could consider the incorporation of a series of safety strategies, including the use of “bicycle friendly city” signs to raise awareness and enforce the slower speed limit within the community. Additional safety strategies include the incorporation of shared lane markings along the Gulf Boulevard corridor or keeping the paved shoulder and reinforcing signage. The community could also increase the enforcement of existing traffic laws and launch an educational campaign to raise awareness of bicycle and pedestrian safety laws.

To promote bicycling within the community, the City could incorporate additional bike parking and incorporate a bike valet service at events. The LDC could also be modified to require bike parking as part of the approval process for new projects. The current LDC allows for bike parking to provide an offset for regular parking. Bike parking facilities that are at least 50 square feet in size, which allows space for five bicycles, can replace one required vehicle parking space for all uses except single-family, two-family, multifamily and bed-and-breakfast establishments.



### Parking

The community has identified a concern that there is insufficient parking in commercial areas. Indian Rocks Beach is currently the last beach community in Pinellas County to offer free beach parking. This provides an incentive for visitors to park in Indian Rocks Beach and walk to the beach. However, in the commercial areas, this can be an issue. People often park in business parking and walk to the beach or attempt to park on residential side streets and cause congestion. The creation of a parking deck or shared parking garage was proposed as an option, however some residents were concerned over the costs associated with this type of project, whether it would fit within the community, and were unsure as to whether it would solve the issue. Other options proposed include the incorporation of metered parking and providing a two-hour parking maximum. The public seemed open to these ideas, however some people were concerned that charging for parking might hurt local business revenue, as people might be more hesitant to patronize the businesses if they were forced to pay for parking. One strategy to determine if parking is needed and where it is needed would be for the community to conduct a parking study. This study would provide the information needed for the community to better assess their parking needs to determine the parking inventory and occupancy at key peak times. The parking study can also provide recommendations

for amendments to the LDC to better address parking requirements. The LDC requires on-site parking for each type of use identified, and the community could consider relaxing these standards to allow for more flexibility. The community currently allows bike parking to offset vehicle parking, but the community could also consider incorporating golf cart parking and e-scooter parking as a contribution to the parking requirements as well. The City could also consider offering incentives, parking in-lieu fees, and parking reductions for developments that include additional bicycle parking or covered trolley/transit stops. The City could also consider providing wayfinding and signage to potential shared parking locations and points of interest. In the future, the community can revisit the parking issue through the use of the strategies in this study to determine the best course of action moving forward.

To create the vision that the community has for a safe, accessible environment, the City should consider strategies to increase connectivity, improve safety, and reduce congestion. It is important for the City to decide which strategies the community is interested in incorporating and use them to foster a better transportation network within the community.



# Indian Rocks Beach Crash Locations

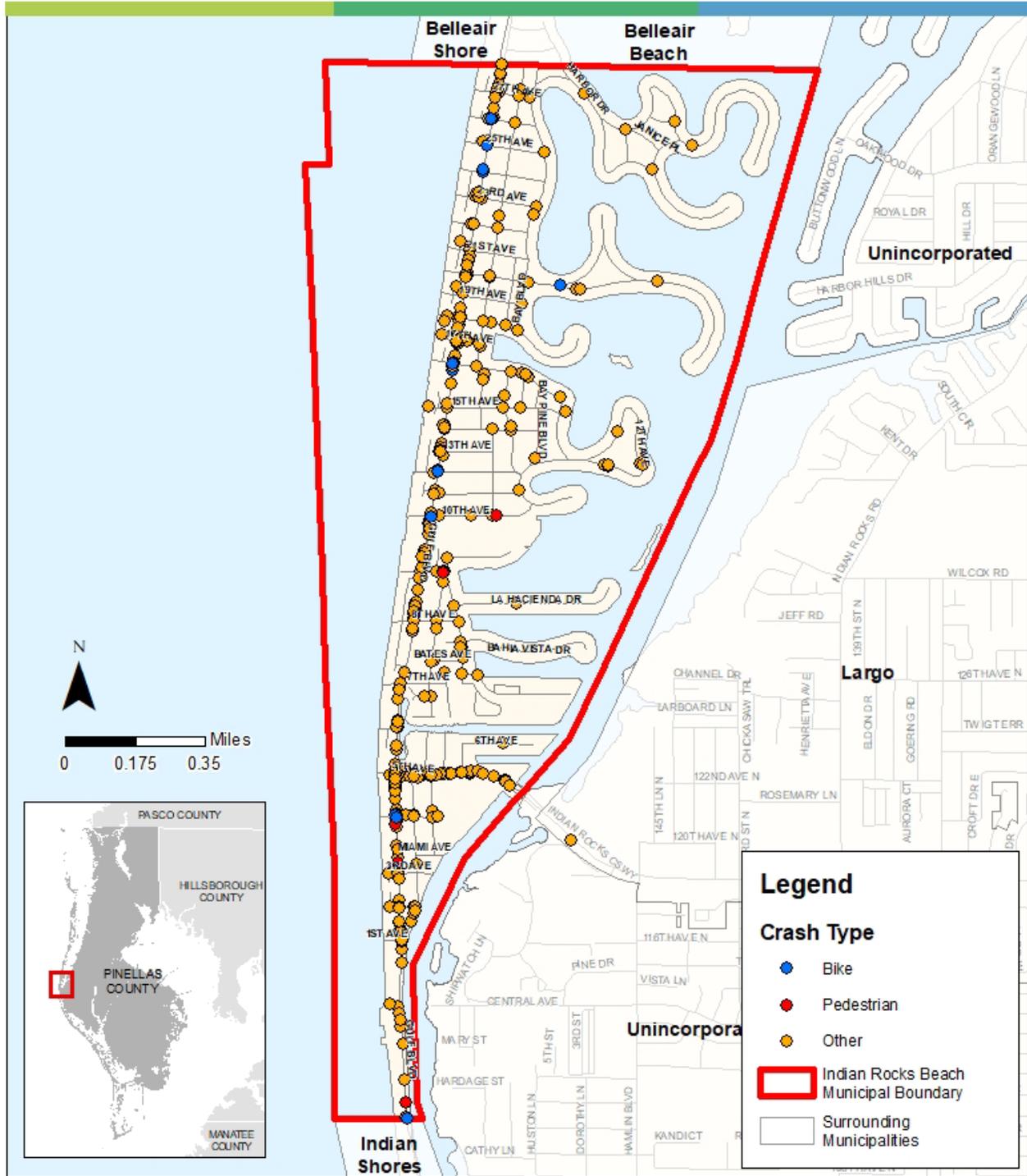


Figure 13: Indian Rocks Beach Crash Locations, Five-Year Average for the 2008-2018 Decade.  
 Source: Pinellas County eGIS, Pinellas County Planning Department, Forward Pinellas, 2019

# Indian Rocks Beach Transit Ridership

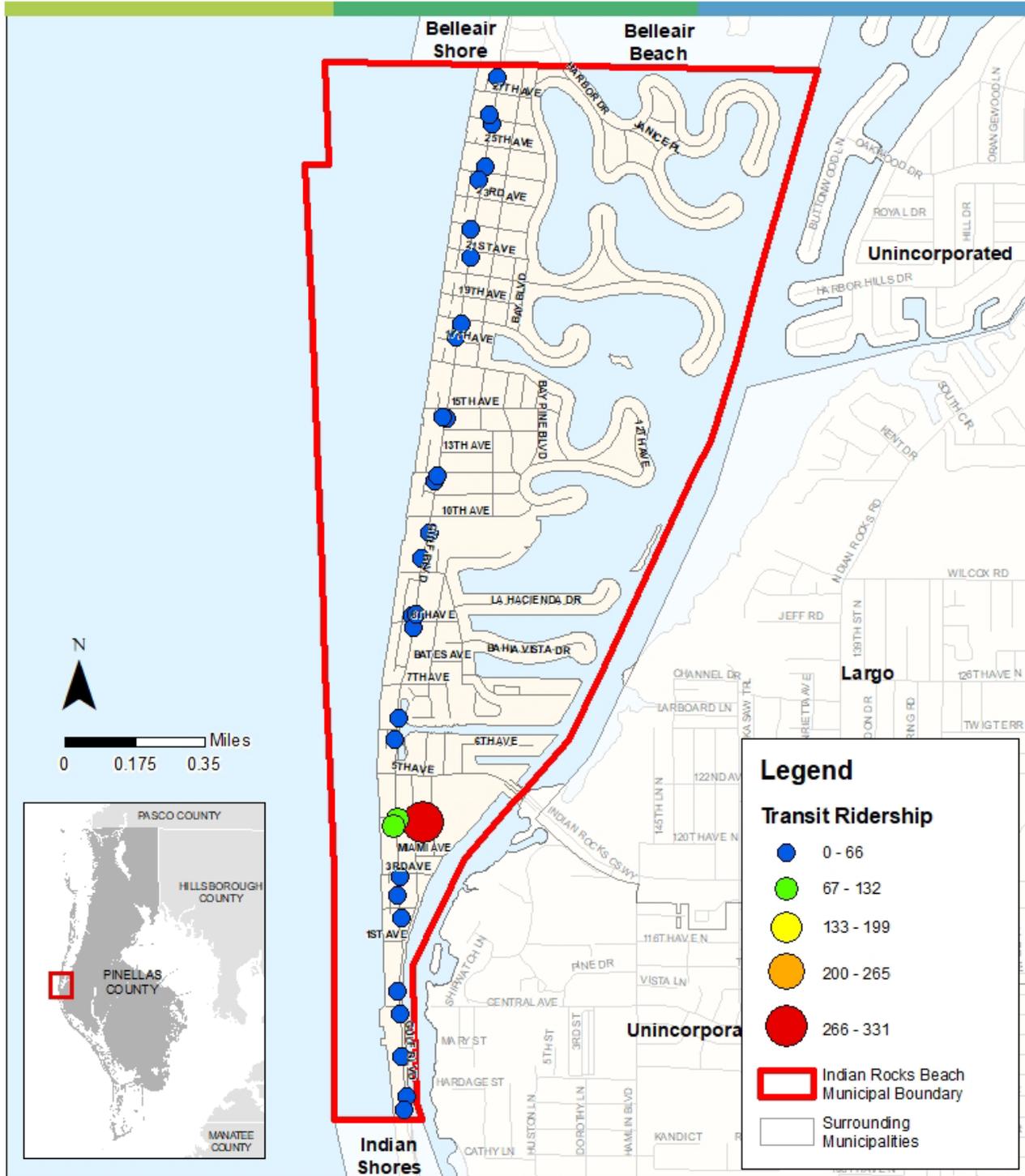


Figure 14: Indian Rocks Beach Average Daily Transit Ridership – February-June 2019.  
 Source: Pinellas County eGIS, Pinellas County Planning Department, Pinellas Suncoast Transit Authority, Forward Pinellas, 2019

## Quality of Life and Environmental Protection



### Vision

**Maintaining a thriving beach community that fosters a safe, livable, and clean environment with a passion for wildlife and beach protection and preservation.**

### Guiding Principles

- 1. Encourage open space preservation and maintenance of greenspace to promote a healthy environment and quality of life.**
- 2. Create a more resilient community through the use of planning tools that will help to predict the potential impacts of sea level rise.**
- 3. Ensure the maintenance of adequate stormwater and drainage infrastructure to reduce the likelihood of potential damage from flooding events.**
- 4. Encourage beautification efforts throughout the community to remove litter and promote a healthy and clean environment.**

Quality of Life and Environmental Protection encompasses the desire to have a healthy and clean community that has plenty of greenspace to improve overall quality of life. It also represents a community that is resilient to natural disasters, and adaptive to climate change.

### What We've Learned

The community has expressed a desire to promote open space conservation and greenspace. They are interested in maintaining pedestrian scale development to support a healthy beach community. The City should continue to monitor and evaluate the resiliency of infrastructure and their susceptibility to sea level rise. They have also identified concerns over littering throughout the community.

### Developing Strategies

Indian Rocks Beach is a community rich with natural resources and public spaces. The City has seven public parks, a nature preserve, boardwalk, skate park, dog park, 27 beach accesses/parks, three miles of shoreline, and even has a community garden to provide locally sourced food to residents and visitors.<sup>xxxiii</sup> The City has a vested interest in preserving open space and greenspace throughout the community. The parks and open space contribute to the community's small-town character and form, and promote an active, healthy lifestyle. Parks and open space play a key role in mitigating the effects of climate change as well. They can increase community resilience because they provide a place for community members to gather and build relationships. They also help to offset

the urban heat island effect, better air quality, and can absorb water during storm surge and flooding events. <sup>xxxiv</sup>

### Preserving Open Space

There are strategies that the community can incorporate to preserve open space, such as purchase or transfer of development rights. The purchase of development rights puts a restriction on future development on a piece of land. Transfer of development rights transfers the developable rights from one property to another. <sup>xxxv</sup> The LDC currently allows for the transfer of development rights from one parcel to another within the City. The code currently requires that any parcel from which development rights are transferred must only be used for the uses outlined in the preservation land use category. If that is not possible, the code allows for a maximum density/intensity of one unit per acre, or five percent floor area ratio per acre.

The community can also use green infrastructure planning to identify community ecological assets and preserve them. Green infrastructure planning helps to create a network of natural resources that can build resiliency and protect greenspace within a community. The community could also identify indicators to measure and ensure ecosystem health over a period of time. <sup>xxxvi</sup>

### Improving Resiliency

In addition to preserving open space, the community in Indian Rocks Beach is concerned with resiliency and adaption to climate change impacts. As a community on a barrier island, the City of Indian Rocks Beach is particularly susceptible to the impacts of climate change and sea level rise. Within the Tampa Bay region, climate change is a major issue that communities are working to address. The region is vulnerable to the effects of flooding because of its location and low elevation, and research indicates that flood risks are increasing. The Tampa Bay



region has seen a 7- inch increase in sea level rise since 1946. The Tampa Bay Regional Planning Council (TBRPC) recently launched the Tampa Bay Resiliency Coalition which consists of members from six counties and 21 municipalities. The coalition meets to discuss regional issues related to improving resiliency. <sup>xxxvii</sup> The Tri-County Transportation Management Area consisting of Hillsborough, Pinellas and Pasco MPOs, FDOT, and the TBRPC launched Resilient Tampa Bay Transportation in 2019, which is a vulnerability analysis pilot project funded by a Federal Highway Administration (FHWA) grant. The vulnerability analysis is meant to ensure that the region's transportation system will meet

its needs. <sup>xxxviii</sup> Combined, these efforts will help to develop key strategies to improve resiliency within the region.

The City of Indian Rocks Beach is in the CHHA and increases in density and intensity for parcels in a CHHA require proper mitigation criteria balancing as identified in the Countywide Rules. The City is also in a Special Flood Hazard Area as designated by the Federal Emergency Management Agency (FEMA), which means the area is identified as having a high risk for flooding and all parcels are required to have a flood insurance policy. Any new construction must be elevated above Base Flood Elevation (BFE) to receive flood insurance. The City is also located in Hurricane Evacuation Zone A, which reflects the highest vulnerability to storm surge events and is the first zone to be evacuated during a storm. <sup>xxxix</sup>

There are various strategies to improving the resiliency of a community. The City could consider providing adequate stormwater and drainage infrastructure. In Holmes Beach on Anna Maria Island, for example, the community is exploring the option of increasing stormwater fees to improve stormwater infrastructure and resiliency within the community. They are also attempting to secure grant funding and appropriations funding to continue resiliency projects in the City.<sup>xi</sup> The City is also in the process of undergrounding/hardening of infrastructure, and the community should investigate methods of floodproofing underground utilities. The community could also encourage the use of floodproofing methods, which include techniques such as “dry floodproofing,” which is a technique in which a sealant or barrier is applied to a structure to surround it to prevent floodwaters from entering it. Another technique is “wet floodproofing,” which is when portions of a structure that are not inhabited are made resistant to flood damage by allowing water to flow through them.<sup>xii</sup> “The National Flood Insurance Program (NFIP) allows a new or substantially improved non-residential building in an A Zone (Zone A, AE, A1-30, AR, AO or AH) to have a lowest floor below the Base Flood Elevation (BFE), provided that the design and methods of construction have been certified by a registered professional engineer or architect as being dry floodproofed in accordance with established criteria.”<sup>xiii</sup> It is not permitted to floodproof areas below the BFE in residential buildings.<sup>xiiii</sup> For complete information on floodproofing and building requirements please visit FEMA’s website.

Other strategies include modeling for sea-level rise and storm surge to project potential impacts in the future and the community could incorporate countermeasures into capital improvement planning. The National Oceanic and Atmospheric Association (NOAA) Office of Coastal Management developed a tool that aids communities in anticipating the impacts of sea level rise at different intervals. It is meant as a preliminary “screening-level” tool to aid coastal managers and scientists in determining trends and priorities. The tool shows the sea level rise inundation above the current Mean Higher High Water (MHHW) throughout Pinellas County, during the highest high tides for each sea level rise interval. **Figure 15** shows the impacts to Indian Rocks Beach at a 4-foot interval and at a

10-foot interval.<sup>xiv</sup> To further explore the tool, please visit: <https://pinellas-egis.maps.arcgis.com/apps/webappviewer/index.html?id=c8aca6bce6e1408abbd99d2542bdf762>.

It is important for the community to evaluate its options when it comes to promoting open space preservation, and to incorporating resiliency practices. During the implementation phase of the vision, the community will need to make some decisions as to whether they are interested in incorporating any of these options in the future.

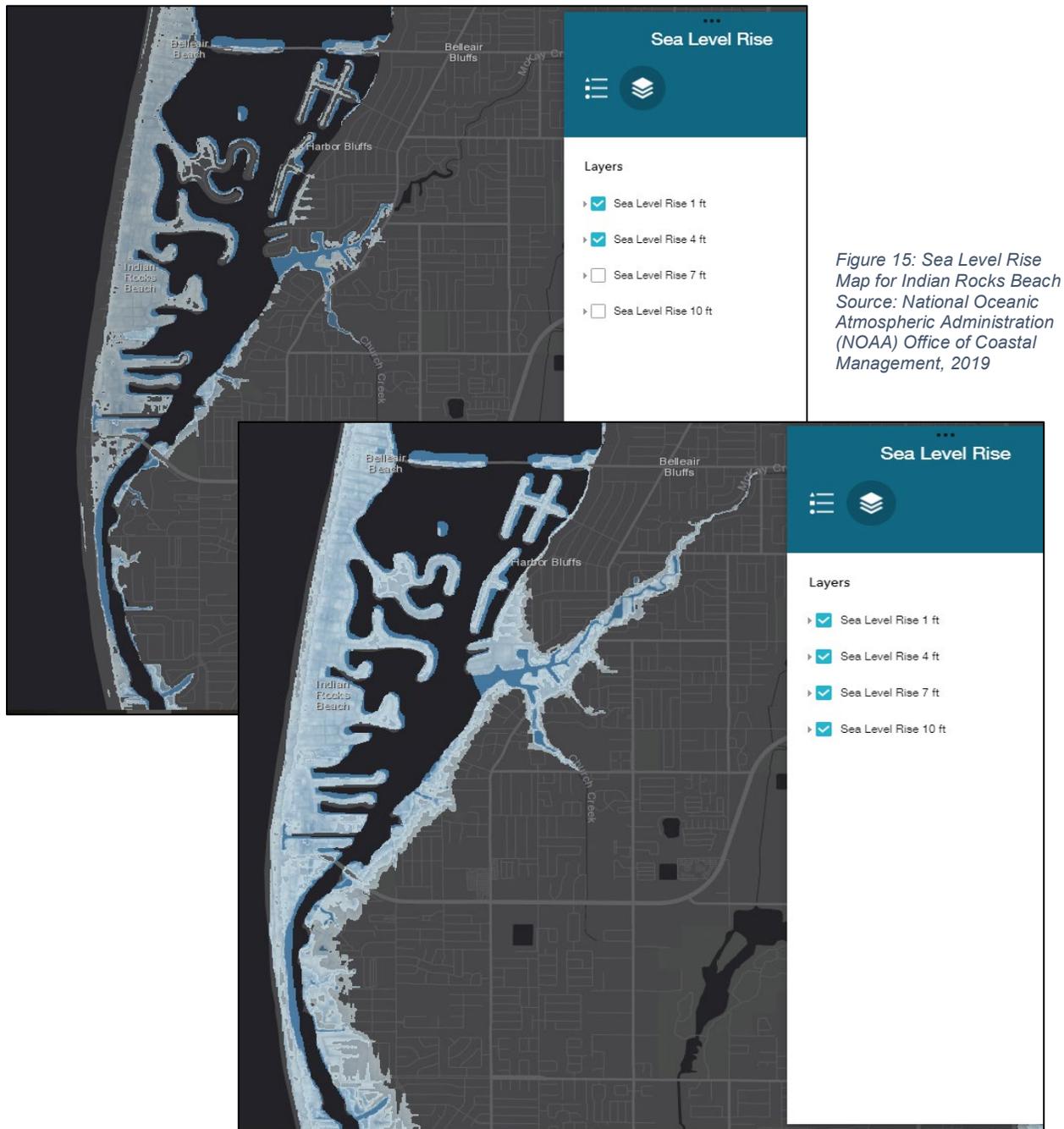


Figure 15: Sea Level Rise Map for Indian Rocks Beach  
Source: National Oceanic Atmospheric Administration (NOAA) Office of Coastal Management, 2019

### 3.4 Conclusions and Recommendations

To guide Indian Rocks Beach in developing a vision for the future of the community, the study team has identified a series of strategies and recommendations that the community can decide to implement. This section includes a summary of these strategies and recommendations, that reflect what we've learned about the community, and the goals and outcomes it hopes to achieve. The recommendations are categorized by **Near Term (1-2 years)**, **Mid-Term (2-4 years)**, and **Long Term (4+ years)**.

#### Economic Vitality



- The Narrows and Uptown were identified as areas with the highest potential for the future location of a smaller-format grocer, based on the amount of available land.
- The current market indicates that Indian Rocks Beach may be oversupplied with restaurants when considering the residential population located there. However, the Narrows could likely support more restaurant development due to the continuing trends in the local economy, as tourism is growing county-wide.
- **Near Term (1-2 years)**: Further analysis will need to be conducted to identify the impacts of tourist demand on the local economy. Once the City identifies all the vacation rentals within the community, they should conduct a further analysis to identify their potential impact on the local economy.
- **Near Term (1-2 years)**: The City should partner with organizations and develop programs that provide information and professional networking opportunities for small businesses to share ideas and overcome challenges, and training programs to grow their business.
- **Near Term (1-2 years)**: The City should work to identify potential challenges to the start-up of small businesses. These challenges could be related to the permitting and the application process for a business to get any issues resolved quickly and efficiently.

#### Community Character



- **Near Term (1-2 years)**: It is highly recommended that the City work to update the LDC to provide additional clarity. For example, the LDC does not currently provide a clear cross-reference between the business zoning district and business district triangle overlay zone. Doing so would help to alleviate some confusion on allowable height and setback requirements.
- **Near Term (1-2 years)**: It is highly recommended that the City also develop a summary table of zoning districts that includes allowable uses, setbacks, and

heights, and work to simplify the shared parking matrix in the LDC and provide clarity on number of parking spaces required as identified by use.

- **Near Term (1-2 years):** It is highly recommended that the City add elements to the Indian Rocks Beach business triangle overlay zone and within the LDC in general to encourage a pedestrian-scale environment, such as waiving setback requirements completely, and adjusting the parking standards to reduce requirements. The LDC should provide incentives to locate parking to the rear of buildings and off-site and shared parking requirements should be more flexible. The City should allow adjacent on-street parking spaces to count towards on-site parking requirements.
- **Near Term (1-2 years):** The City should work with developers during the site plan approval process to negotiate for desired elements the City would like incorporated in the community.
- **Mid-Term (2-4 years)** The community has identified an interest in mixed-use development, however, only in certain contexts. The retail market assessment identified the Narrows as having medium to higher potential for mixed-use development based on conversations with existing owners, and Uptown as lower to medium potential. The City must determine where it would like mixed-use development to locate as it will require development incentives, which require support from the community.
- **Mid-Term (2-4 years):** The City has also identified a desire to preserve historic resources. As part of this effort, the community should consider a historic preservation strategy such as those outlined in the Community Character section of this report or identify one that it would like to implement.

#### Transportation and Mobility

- **Near Term (1-2 years):** The community has expressed an interest in exploring the option of providing a free circulator service within the community, particularly in the Narrows. This option would potentially reduce parking needs and help ease congestion. The City should issue a request for information (RFI) from the circulator service providers to gauge interest and find out potential costs.
- **Near Term (1-2 years):** There are several strategies to improve visibility, such as the reduction of the height of vegetation that may inhibit visibility, and the improvement of both pedestrian scale and overhead lighting.
- **Near Term (1-2 years):** To address parking requirements, it is highly recommended that the City conduct a parking study to provide the information needed for the community to better assess their parking needs and propose strategies to address

them. The parking study can also provide recommendations for amendments to the LDC to better address parking requirements.

- **Near Term (1-2 years):** The City should launch an educational campaign or engage in the Safe Streets Pinellas effort to raise awareness of bicycle and pedestrian safety laws.
- **Mid-Term (2-4 years):** The community should incorporate curb space for rideshare services, which also reduces parking needs. The City should also consider creating an e-scooter policy.
- **Mid-Term (2-4 years):** It is highly recommended that the City install “bike friendly city” signs to reinforce the lower speed limit on Gulf Boulevard and increase enforcement. The City should also incorporate radar speed feedback signs to track speeding and patterned or textured crosswalks to lower speed. It should also either incorporate shared lane markings along the Gulf Boulevard corridor or keep the paved shoulder and reinforce signage to increase safety and protect bicyclists.
- **Mid-Term (2-4 years):** The City should consider incorporation of pedestrian enhancements such as sidewalks within the commercial areas as needed to address gaps and to provide enhanced multimodal connectivity.
- **Mid-Term (2-4 years):** It is highly recommended that the City incorporate additional bike parking, create bike parking incentives, and consider including a bike valet service at events. The LDC could also be modified to require bike parking as part of the approval process for new projects.
- **Long Term (4+ years):** The City should consider offering incentives, parking in-lieu fees, and parking reductions for developments that include additional bicycle parking or covered trolley/transit stops. The City should also consider providing wayfinding and signage to potential shared parking locations and points of interest.

#### Quality of Life and Environmental Protection



- **Near Term (1-2 years):** To improve resiliency it is highly recommended that the City update the Stormwater Master Plan to ensure they are providing enhanced stormwater and drainage infrastructure. The City is also in the process of the undergrounding/hardening of infrastructure, and the community should investigate methods of floodproofing underground utilities.

- **Near Term (1-2 years):** The community should also encourage the use of floodproofing methods, which include techniques such as “dry floodproofing,” and “wet floodproofing,” and the methods must be compliant with FEMA requirements.
- **Mid-Term (2-4 years):** To improve resiliency it is highly recommended that the City model for sea-level rise and storm surge to project potential impacts in the future. To plan for the projected impacts of climate change, it is highly recommended that the community incorporate countermeasures into capital improvement planning.
- **Mid-Term (2-4 years):** There are strategies that the community can incorporate to preserve open space, such as purchase or transfer of development rights. The community should consider green infrastructure planning to identify community ecological assets and preserve them. The community should consider identifying indicators to measure and ensure ecosystem health over a period of time.

### Next Steps

The identified strategies are meant to serve as options for the community to consider in the future. During the implementation phase of the vision, the community will have the opportunity to determine if these strategies are techniques they would like to use. The City Commission should engage the community in a conversation about these recommendations to identify which strategies the community would like to implement and reasonable timeframes for phasing actions. Because the findings in this study are preliminary, it is important to note that further research may be needed to identify a course of action for any one theme. Through the use of the vision statements and guiding principles established in this report, the City can take ownership of its future, to implement a vision that truly represents the goals and objectives of the community.



## References

- <sup>i</sup> Community Tool Box, Center for Community Health and Development, University of Kansas
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- <sup>iii</sup> *Indian Rocks Beach Special Area Plan: A Vision for Growth and Development*, 2009. Florida Center for Community Design and Research. University of South Florida.
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# A1

## Appendix





# CITY OF INDIAN ROCKS BEACH, FL

## Retail Market Analysis

March 16, 2020



VISION  
ECONOMICS  
STRATEGY  
FINANCE  
IMPLEMENTATION

# OVERVIEW

SB Friedman was engaged by the City of Indian Rocks Beach (the “City”) to evaluate the market feasibility of new retail development within the city. Three primary commercial corridors were analyzed as a part of the market study: The Narrows, the Midtown Commercial Area, and the Uptown Commercial Area.

We began our retail market assessment by conducting a retail inventory and compiled a profile for each corridor. Vacant and underutilized properties that may be susceptible to change were also identified.

Given the City’s desire for additional local-serving retail, we assessed the development potential for convenience retail opportunities, such as grocery stores, and additional restaurants. Furthermore, SB Friedman conducted a high-level inventory of the retail and restaurant market of Dunedin, which was cited by the City as a potential case study.

The City had also expressed interest in the potential of incorporating new retail development in a vertical mixed-use format. SB Friedman identified key considerations for developing mixed-use development within the city in the future.

# Key Redevelopment Considerations

**MARKET-FEASIBLE:** Redevelopment must be grounded in market realities with a market-supportable development program

**SITE:** There must be an appropriate site with a willing owner that meets site requirements for access, visibility, parking, zoning, and other considerations

**COMMUNITY VISION/POLITICAL SUPPORT:** Redevelopment is often complex and requires vision and strong political leadership to support the development

**FINANCIALLY-FEASIBLE:** Redevelopment must be financially-feasible based on current market conditions for rent, construction costs, land prices, etc.



# RETAIL STRUCTURE

- The Narrows
  - The Narrows is roughly bounded by 1<sup>st</sup> Avenue and 6<sup>th</sup> Avenue as its southern and northern boundaries and extends to the city's eastern border. The retail submarket in this area is predominately tourist-focused, consisting of restaurants, bars and other "experiential" retail.
- Midtown Commercial Area
  - Midtown is located north of The Narrows and extends from 11<sup>th</sup> Avenue to 18<sup>th</sup> Avenue. Retail development in this area is convenience-oriented/neighborhood-serving and geared towards the local population, with much of it located in various strip retail center formats.
- Uptown Commercial Area
  - Uptown stretches from 18<sup>th</sup> Avenue to the city's northern border. As with Midtown, retail development in this area is in stand-alone buildings or in strip retail centers and is more convenience-oriented to serve the local population.



Source: Esri; SB Friedman; US Census Bureau

# THE NARROWS

# THE NARROWS

- Retail in The Narrows consists predominately of local restaurants that cater towards tourists and visitors to the city, as well as:
  - One national retailer (CVS); limited service, convenience-focused
  - Professional services including realtor and vacation rental offices
  - Other retailers include plant nursery, hair salon, and beach equipment rental stores
- Building stock constructed prior to the 1960s with limited newer construction
  - Newer strip retail development south of CVS, comprising approximately 13,200 SF

RESTAURANTS & DRINKING PLACES



PROFESSIONAL SERVICES<sup>[1]</sup>



HEALTH & PERSONAL CARE



SPORTING GOODS AND HOBBY



HOME IMPROVEMENT



CLOTHING

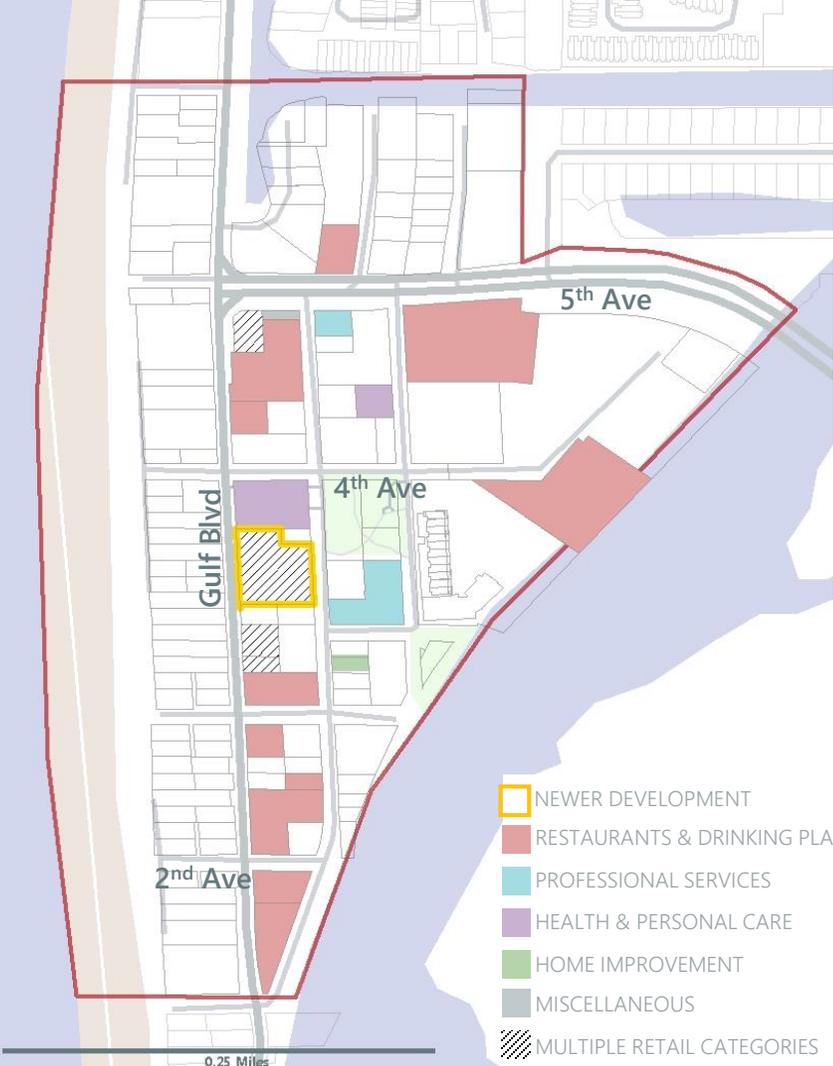


MISCELLANEOUS<sup>[2]</sup>



**27** TOTAL RETAILERS

[1] Professional Services includes vacation rental property and real estate brokers  
 [2] Miscellaneous includes Indian Rocks Beach Welcome Center  
 Source: City of Indian Rocks Beach; SB Friedman; Yelp!



Source: City of Indian Rocks Beach; Esri, Pinellas County Property Appraiser's Office; SB Friedman; Yelp!

# BUILDING PROFILE

## The Narrows



	401-409 Gulf Blvd	321 Gulf Blvd	309 Gulf Blvd
Tenant(s)	Crabby Bill's Seafood, Ready Set Yo!	Beach Zone, Baked Batata & More, Anecdote Brewing Company	Slyce Pizza, Candy Kitchen, It's Your Day Café
Square Feet	12,298	13,172	5,640
FAR	0.2	0.3	0.3
Parking Ratio	5/1,000 square feet	2/1,000 square feet	6/1,000 square feet
Year Built	1948	2017	1957
Building Typology	Freestanding Buildings	Strip Retail	Strip Retail
Rent PSF	N/A	\$16	N/A
Occupancy	Single Tenant	100% <sup>[1]</sup>	100%

# SITES SUSCEPTIBLE TO CHANGE

- Vacant and underutilized properties in The Narrows with redevelopment potential
  - Two vacant buildings including a former gas station and restaurant
    - Despite adjacency to 5<sup>th</sup> Avenue, the vacant restaurant building has limited access and visibility
  - Large underutilized surface parking lots could be developed in partnership with private owners
- Four potential catalytic sites within The Narrows
  - Two blocks are primarily controlled by single local property owners
    - Crabby Bill's and Plumlee Trust
    - Conversations with property owners have indicated potential interest in redevelopment
  - The Aqua Prime owner is currently assembling parcels along Gulf Boulevard and 1<sup>st</sup> Street to create larger redevelopment sites



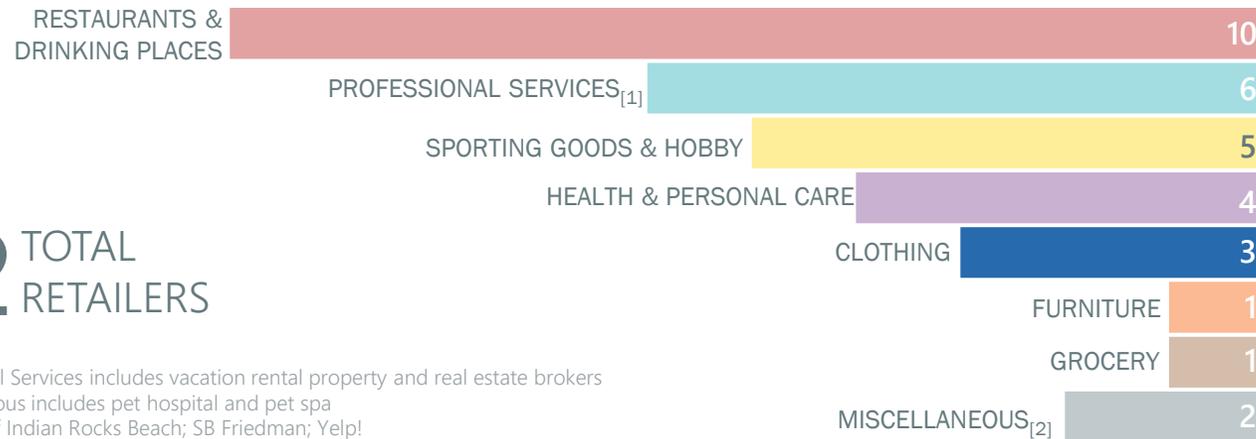
Source: City of Indian Rocks Beach; Esri; Pinellas County Property Appraiser's Office; SB Friedman

**MIDTOWN**

# MIDTOWN

- Predominately neighborhood-serving, with local restaurants, professional services and convenience uses
  - Two national tenants (Berkshire-Hathaway and Century21 brokerage offices)
- Mixture of freestanding buildings and small-scale strip retail centers
  - Four (4) retail strip centers with high occupancies
  - Auto-oriented development along Gulf Blvd
- Most of building stock constructed prior to 1980 with little renovation or new construction in last 10 years
  - 1309 Gulf Blvd development renovated in 2017

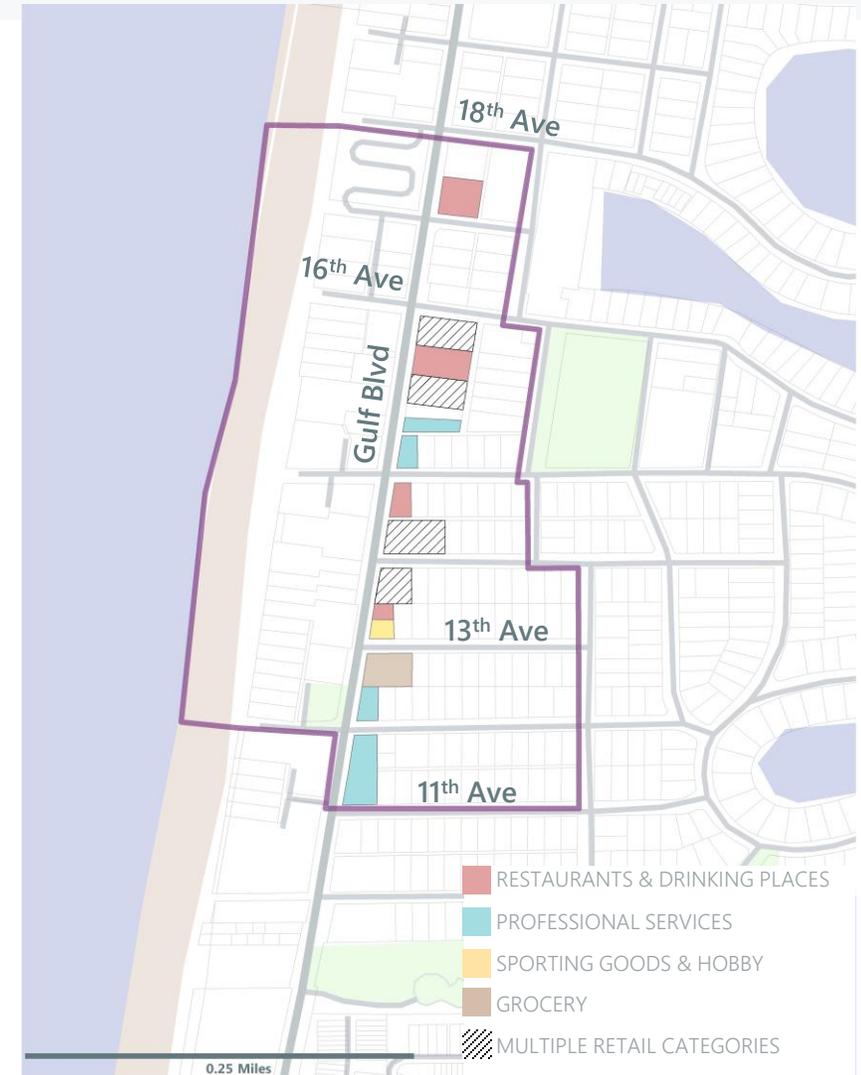
**32** TOTAL RETAILERS



[1] Professional Services includes vacation rental property and real estate brokers

[2] Miscellaneous includes pet hospital and pet spa

Source: City of Indian Rocks Beach; SB Friedman; Yelp!



Source: City of Indian Rocks Beach; Esri; Pinellas County Property Appraiser's Office; SB Friedman; Yelp!

# BUILDING PROFILE

## Midtown



	1519 Gulf Blvd	1405 Gulf Blvd	1401 Gulf Blvd	732 Gulf Blvd
<b>Tenant(s)</b>	Keegan's Seafood Grille, Island Cove Beads, Rapunzel's Salon & Spa, Cove West, Island Attitude	Lana's Red Lion Pub	Pinky's Ice Cream & Candy Shop, Zen Massage & Yoga, Crystal's Nails and Spa, RAD Bicycles, At the Beach, Groupers, Jofi Media, Blvd Barbers	Kooky Coconut
<b>Square Feet</b>	6,161	2,296	6,490	1,518
<b>FAR</b>	0.4	0.3	0.3	0.3
<b>Parking Ratio</b>	3/1,000 square feet	4/1,000 square feet	3/1,000 square feet	6/1,000 square feet
<b>Year Built</b>	1978	1956	1977	1957
<b>Building Typology</b>	Strip Retail	Freestanding Building	Strip Retail	Freestanding Building
<b>Rent PSF</b>	\$22 - Modified Gross	N/A	\$17 - NNN	N/A
<b>Occupancy</b>	100%	100%	100%	100%

# SITES SUSCEPTIBLE TO CHANGE

- Limited large-scale redevelopment opportunities in Midtown
  - Redevelopment efforts would like require land assembly of smaller parcels
- Older buildings throughout Midtown could be rehabilitated



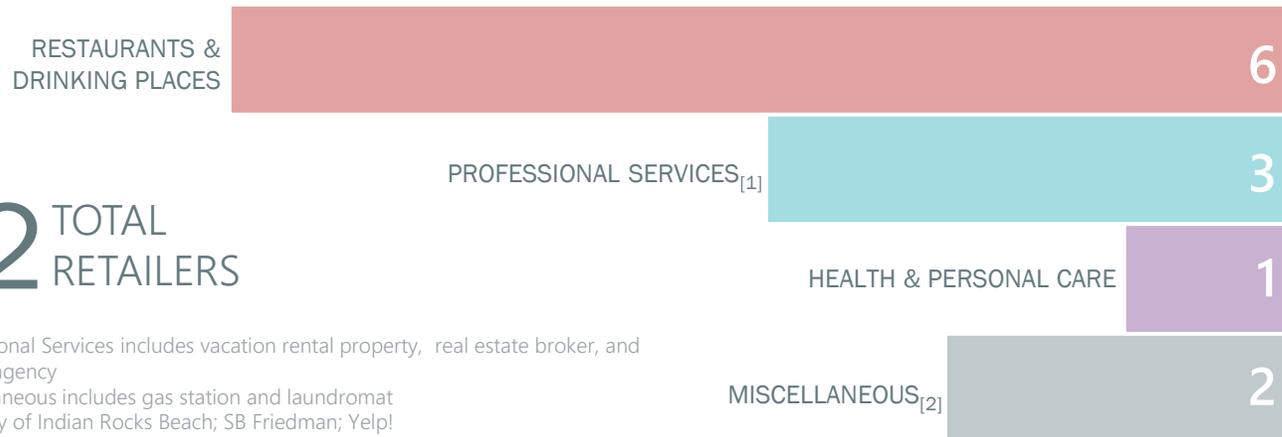
Source: City of Indian Rocks Beach; Esri, Pinellas County Property Appraiser's Office; SB Friedman

**UPTOWN**

# UPTOWN

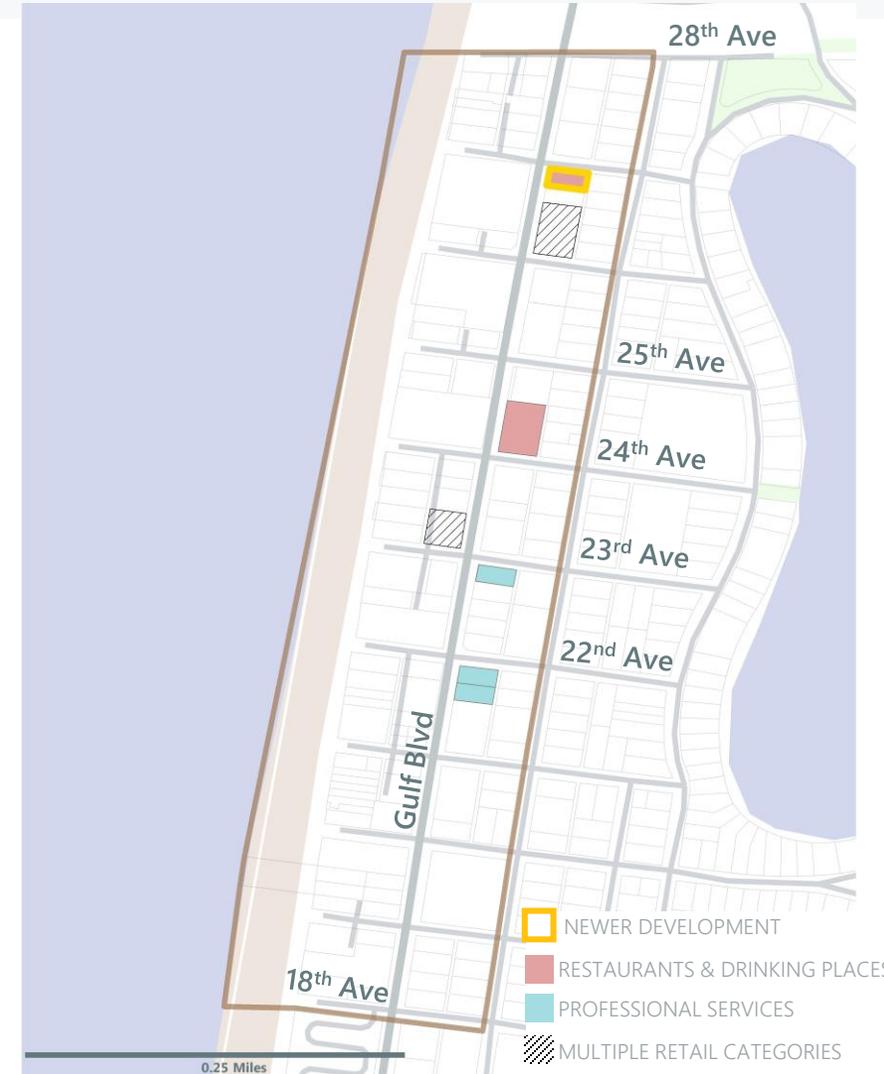
- Smallest retail cluster with only 12 businesses
  - Mostly restaurants (50%) and professional services (25%) including brokerage office
  - Neighborhood-serving retail uses such as laundromat and nail salon
  - Only national chain tenant is Mobil gas station
- Primarily freestanding buildings with one fully occupied strip retail center
  - Paris de Café strip center is the only major retail development located west of Gulf Blvd. because current zoning ordinances do not allow for new retail developments west of Gulf Blvd.
- New restaurant, Casa Italia, opened in June 2019
  - Owner has been approved to develop residential space above restaurant

12 TOTAL RETAILERS



[1] Professional Services includes vacation rental property, real estate broker, and insurance agency

[2] Miscellaneous includes gas station and laundromat  
Source: City of Indian Rocks Beach; SB Friedman; Yelp!



Source: City of Indian Rocks Beach; Esri; Pinellas County Property Appraiser's Office; SB Friedman; Yelp!

# BUILDING PROFILE

## Uptown



	2215 Gulf Blvd	2300 Gulf Blvd	2402 Gulf Blvd	2699 Gulf Blvd
Tenant(s)	PSMI	Thai-Pan Alley, Nails & Spa, Café De Paris, IRB Laundromat, Sandy's Restaurant	18 on the Rocks	Casa Italia
Square Feet	1,275	7,322	4,865	4,096
FAR	0.2	0.5	0.2	0.2
Parking Ratio	5/1,000 square feet	2/1,000 square feet	7/1,000 square feet	2/1,000 square feet
Year Built	1993	1955	1970	2019
Building Typology	Freestanding Building	Strip Retail	Freestanding Building	Mixed-Use
Rent PSF	\$20	\$14 - NNN	N/A	N/A
Occupancy	100%	100%	100%	100%

# SITES SUSCEPTIBLE TO CHANGE

- Currently only one major redevelopment site:
  - Site formerly owned by Pinellas County: Sold to local philanthropist in 2018
  - Uncertain future development plans



Source: City of Indian Rocks Beach; Esri; Pinellas County Property Appraiser; SB Friedman

# CONVENIENCE-RETAIL POTENTIAL

# CURRENT RETAIL TRENDS

Broader retail trends impact the feasibility of brick-and-mortar store development. At year end 2017, e-commerce accounted for 10.5% of total retail sales (nationwide), an increase from 4.1% in 2008. The growth of e-commerce is largely attributable to Amazon, technological advances, quicker than ever delivery methods, and emerging e-commerce business models.

The growth of e-commerce has contributed to store closings, the largest concentrations of which have been in the following retail categories: consumer electronics, apparel, department stores, media, office supplies, and sporting goods. Other drivers of store closings include increased competition and private equity takeovers or overleveraged debt positions of national retailers.

Business that have been successful in the current retail environment include those that are:

- **Experience-focused**, offering a unique mix of shopping, entertainment and dining options;
- **Convenience-focused**, offering quick access to a wide range of goods and services, including groceries and carryout food; and
- **Value-focused**, including dollar stores, discount grocery, off-price apparel, beauty-cosmetics, budget fitness/health clubs, fast fashion and fast casual restaurants.

**Residents of IRB have expressed interest in experience-focused restaurants and convenience-focused grocery.**



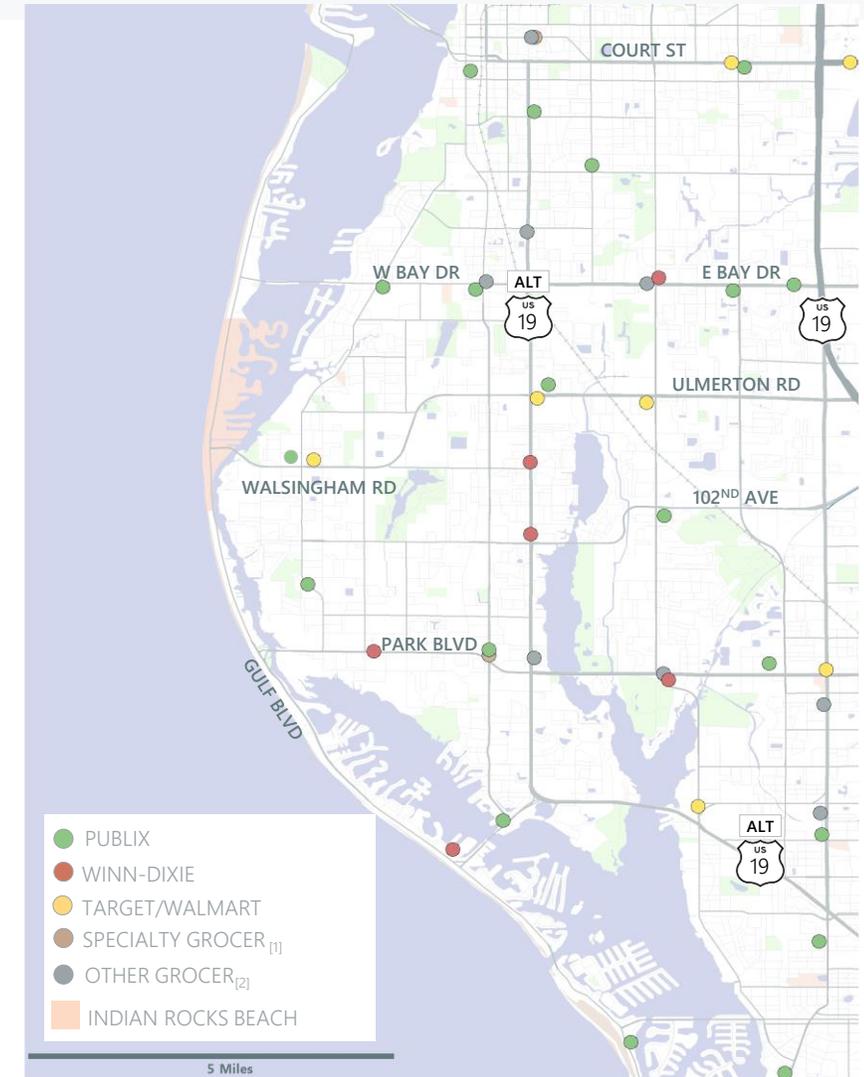
2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

Source: US BLS; Estimated Quarterly U.S. Retail Sales (Not Adjusted): Total and E-commerce  
Estimates are based on data from the Monthly Retail Trade Survey and administrative records for fourth quarter of each year

# CONVENIENCE-ORIENTED RETAIL

## Grocery

- IRB residents expressed interest in a grocery store within the city.
- There is not a grocery store within the city limits, thus residents are currently driving to nearby grocery stores
- Closest grocers located on mainland Pinellas County
  - Publix and Walmart in Largo on Walsingham Road
  - Publix in Belleair Bluffs on W. Bay Drive
- People from IRB may drive further distances to shop at specialty grocers
  - Earth Fare
  - Lucky's Market
  - Nature's Food Patch
- There are few grocery stores on barrier islands
  - Winn-Dixie in Madeira Beach
  - Publix in Treasure Island
  - Publix in St. Pete Beach
- SB Friedman assessed the market demand that could be recaptured locally to support a grocery store within IRB. This does not assume net new demand but that the new grocery store would capture existing demand being spent elsewhere



[1] Includes Earth Fare and Nature's Food Patch

[2] Includes Aldi, Bulk Nation, Save-A-Lot

Source: Esri; SB Friedman; US Census Bureau

# GROCERY CONSIDERATIONS

In determining the viability of attracting a grocer to the city, SB Friedman identified and analyzed the following considerations:

- **Site:** Do various sites within the city have the capacity to support grocer development?
  - Building footprints
  - Floor-to-area ratio (FAR)
  - Traffic counts
- **Market Demand:** Is there sufficient local market demand to support a grocer? What percent of demand would need to be captured locally to support a grocery store?
  - Residential grocery demand
  - Visitor/tourist grocery demand (based on hotel keys)

# SITE: LOCATION AND BUILDING CRITERIA

## Typical requirements of grocers expanding in Pinellas County

- SB Friedman collected location and building requirements for smaller-format and larger-format (over 25,000 building SF) grocers using data from Retail Lease Trac on grocers currently located and/or expanding in Florida

### SMALLER-FORMAT



#### ALDI

#### Fresh Market

#### Trader Joe's

	ALDI	Fresh Market	Trader Joe's
<b>Building Footprint Range</b>	17,000 – 20,000 sf	18,000 – 21,000 sf	10,000 – 14,000 sf
<b>Site Required<sup>[1]</sup></b>	1.3+ acres	1.4+ acres	0.8+ acres
<b>Traffic Counts</b>	20,000+ ADT	25,000+ ADT	N/A
<b>Other Requirements</b>	N/A	N/A	N/A

[1] Assuming a FAR of 0.3  
Source: Retail Lease Trac; SB Friedman

### LARGER-FORMAT



#### Lucky's Market

#### Publix

#### Whole Foods

Lucky's Market	Publix	Whole Foods
25,000 – 30,000 sf	28,000 – 61,000 sf	25,000 – 50,000 sf
1.9+ acres	2.1+ acres	1.9+ acres
Located on main or high traffic corridor	N/A	N/A
-Large parking field (5+ spaces per 1,000 sf) -High visibility -Easy access to roadways	-Large parking field (5+ spaces per 1,000 sf)	-High number of college-educated residents

# SITE: LOCATION AND BUILDING CRITERIA

- Larger-format grocers in Pinellas County typically require almost 2 acres or more of land for development
  - Limited sites in city could support larger-format grocer
- Smaller-format grocers need approximately 1 acre or more
  - Former County Site (1.1 acres), located in the Uptown District, may have sufficient site capacity to support smaller-format grocer
  - Redevelopment with land assembly in The Narrows could also potentially yield site for smaller-format grocer
  - No suitable site in Midtown, would require extensive land assembly efforts
- Detailed site capacity studies would be required to determine if a particular site could accommodate required access and parking

# MARKET DEMAND: Local Demand for Grocery

## Grocery demand from residents and visitors

- Market demand is primarily driven by residents and visitors to the city
  - Unmet residential grocery demand
  - Visitor and tourist demand driven by occupied hotel keys
- Based on the spatial distribution of existing competitive grocers in the county, a typical trade area is approximately 3-minute drive time
- Given IRB's unique geography on the barrier islands, we have assumed that residents of IRB are willing to drive more than 3 minutes to shop locally on the barrier islands, thus we have considered the **demand for IRB as a whole**
- Assuming all residents choose to shop locally within IRB, there is approximately \$16.1 million in annual total grocery demand within the city that is currently being spent elsewhere. There is potential to recapture this demand to support a store within city limits.



	The Narrows	Uptown	Indian Rocks Beach
<b>Trade Area</b>	3-minute drive time	3-minute drive time	City overall
<b>Location<sup>[1]</sup></b>	Gulf Blvd & 5 <sup>th</sup> Ave	Gulf Blvd & 25 <sup>th</sup> Ave	---
<b>Population</b>	4,462	2,651	4,386
<b>Hotel Keys</b>	225	0	251
<b>Unmet Residential Grocery Demand</b>	\$13,700,000	\$9,500,000	\$15,100,000
<b>Visitor Grocery Demand<sup>[2] [3]</sup></b>	\$900,000	\$0	\$1,000,000
<b>Total Grocery Demand<sup>[4]</sup></b>	<b>\$14,600,000</b>	<b>\$9,500,000</b>	<b>\$16,100,000</b>

[1] Location based on central point within commercial district

[2] Assumes 70% occupancy rate and 1.5 visitors per key per night

[3] Assumes \$10 food/grocery spending per visitor per day

[4] City-wide total grocery demand does not reflect cumulative total for The Narrows and Uptown; trade areas partially overlap with one another

Source: City of Indian Rocks Beach; Esri; Florida Atlantic University; SB Friedman; Smith Travel Research

# MARKET DEMAND

## Reconciliation of demand to required sales volume

- SB Friedman reviewed annual sales volumes for nearby grocery stores based on data from Esri Business Analyst, which include mainland grocery locations near IRB and grocers located on the barrier islands
- Larger-format grocers (such as Publix and Winn-Dixie) typically generate annual sales volumes of over \$26 million
  - Total grocery demand within city is unlikely to meet required annual sales requirements
- Smaller-format grocers (such as Aldi and Earth Fare) typically generate annual sales volumes of approximately \$12 million
  - Sales volumes per square foot ranged from \$500-\$750 throughout Pinellas County for smaller-format grocers
- Grocery demand within IRB (\$16.2M) is greater than typical smaller-format grocer sales requirements (\$12M), indicating there may be sufficient demand for this typology
  - Based on sales per square foot estimates of \$500-\$750, there may be enough local demand to support a smaller-format grocer between 21,000-32,000 SF
  - In order to capture this level of demand locally, approximately 75% of residents would have to choose to purchase groceries locally within IRB, rather than at competitive stores on the mainland (e.g., Publix)

	Indian Rocks Beach
<b>Format</b>	Smaller-format
<b>Location</b>	City-wide
<b>Potential Demand</b>	\$16.1 M
<b>Sales Volume Per Square Foot</b>	\$500-\$750
<b>Building Square Footage Range</b>	21,000 – 32,000 SF

Source: Esri; Florida Atlantic University; Pinellas County Property Appraiser's Office; Retail TouchPoints; SB Friedman

# CASE STUDY

## Nature's Food Patch – Dunedin, FL



Source: City of Dunedin; SB Friedman  
SB Friedman Development Advisors

Developed in 2018 in mixed-use building

- 8,000 square feet of grocery space; 11,000 square feet total retail space
- Smaller-format grocer focused on prepared foods and experiential shopping
- Co-tenants include hair salon and cocktail bar
- 65 luxury apartment units

**Market Demand:** Required marketing and research to demonstrate strong demographics and sufficient demand for grocer

**Site:** Needed to assemble site large enough to facilitate parking and access

- Site previously occupied by metal manufacturer, sold to city in 1999. City sold land to developer to assemble large enough site

**Financial Feasibility:** Required creative financial structuring

- Supportable grocery tenant rent challenged financial feasibility: Developer offered discounted rent to grocer tenant for first 5 years
- Grocery store appears to be cross-subsidized by apartment rents: Higher residential rents due to presence of grocer

**Vision/Political Support:** Required collective vision and city leadership to complete public-private partnership

- City partnered with developer for land assembly and garage development; developer constructed garage and city pays maintenance
- City financed public improvements including sidewalks and roads
- Community Redevelopment Area (CRA) provided funds to support development

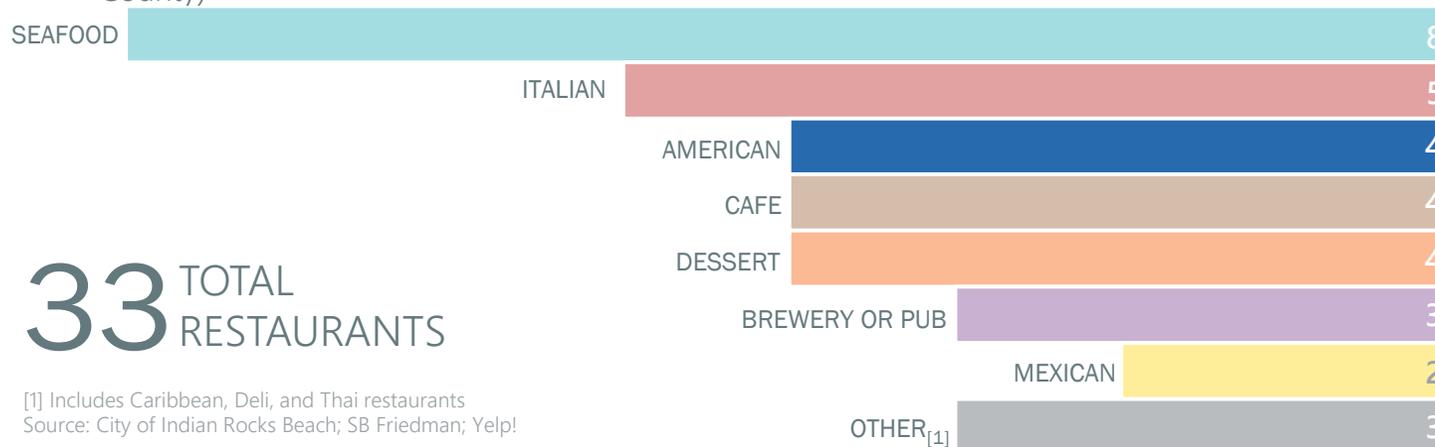
# CONCLUSIONS FOR GROCERY POTENTIAL

- There is limited potential for larger-format grocer such as Publix or Winn-Dixie
  - **Market Demand:** There appears to be insufficient demand generated by residents and visitors to the city to attract larger-format grocer near- to middle-term
  - **Site:** There are few sites within the city that could support a larger-format grocer due to size constraints
- Smaller-format limited-service or boutique grocery development may be possible but would require significant local support
  - **Market Demand:** Assuming city residents are willing to shop locally, Indian Rocks Beach, as a whole, may have sufficient demand to support a smaller-format grocer. In order to capture sufficient local demand, approximately 75% of residents would have to choose to purchase groceries locally within IRB.
  - **Site:** There may be sites that have capacity and owner-willingness to develop smaller-format grocery development. However, detailed site capacity studies would be required to determine if the site could support access and parking. Potential sites may include:
    - Former County Site – Uptown
    - Assembly of underutilized lots/redevelopment blocks – The Narrows
  - **Financial Feasibility:** Financial feasibility was not studied as part of this analysis. Viability depends on land costs, development typology, construction costs, and achievable rent levels
  - **Community Vision/Political Support:** Future grocery development would likely require collective community vision and City leadership to bring to fruition through a public-private partnership

# RESTAURANT POTENTIAL

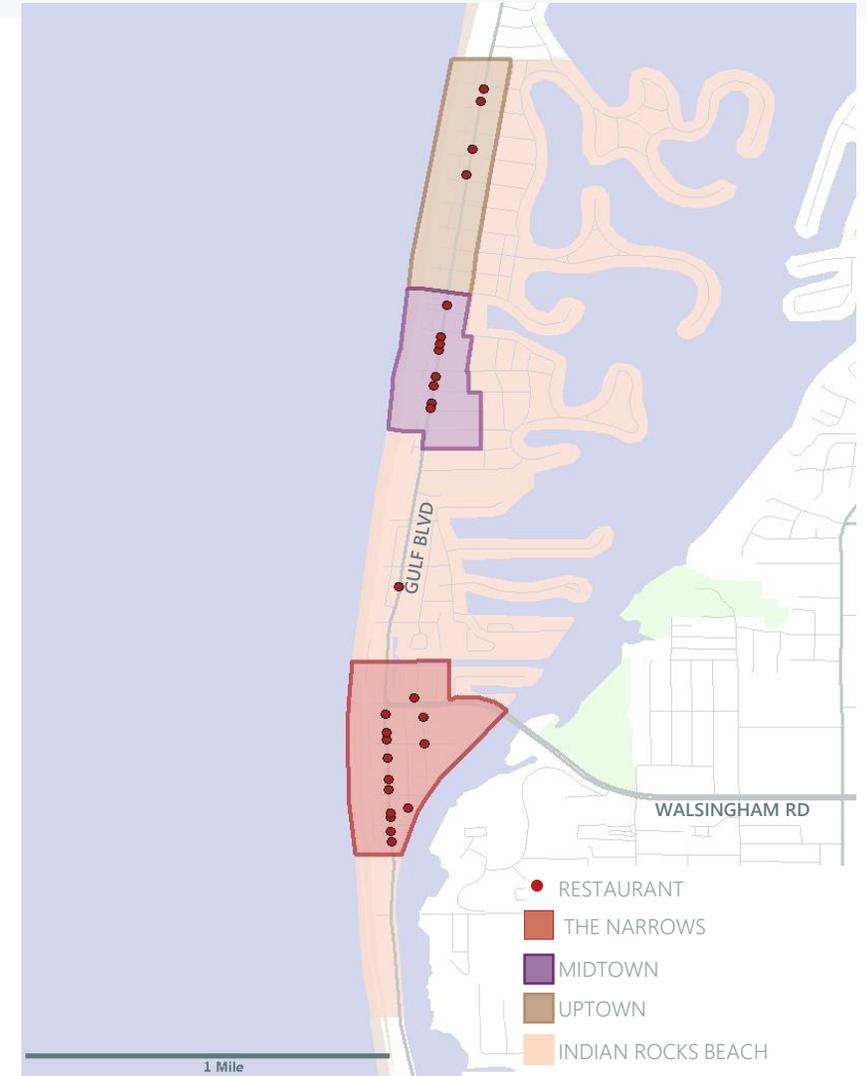
# RESTAURANT

- Public expressed interest in additional restaurants within IRB
- Over half of Indian Rocks Beach restaurants are located in The Narrows
- Existing restaurant sales exceed local residential demand by \$8.5 million, indicating IRB may be oversupplied based on residential population alone. The additional restaurant sales is likely supported by tourism
- Potential for new restaurant would likely depend on:
  - Independent restaurateur interest
  - Creating a restaurant cluster to draw interest
  - Ability to attract additional consumers from outside of IRB (either tourists or elsewhere in Pinellas County)



**33** TOTAL RESTAURANTS

[1] Includes Caribbean, Deli, and Thai restaurants  
Source: City of Indian Rocks Beach; SB Friedman; Yelp!



Source: City of Indian Rocks Beach; Esri; SB Friedman; Yelp!

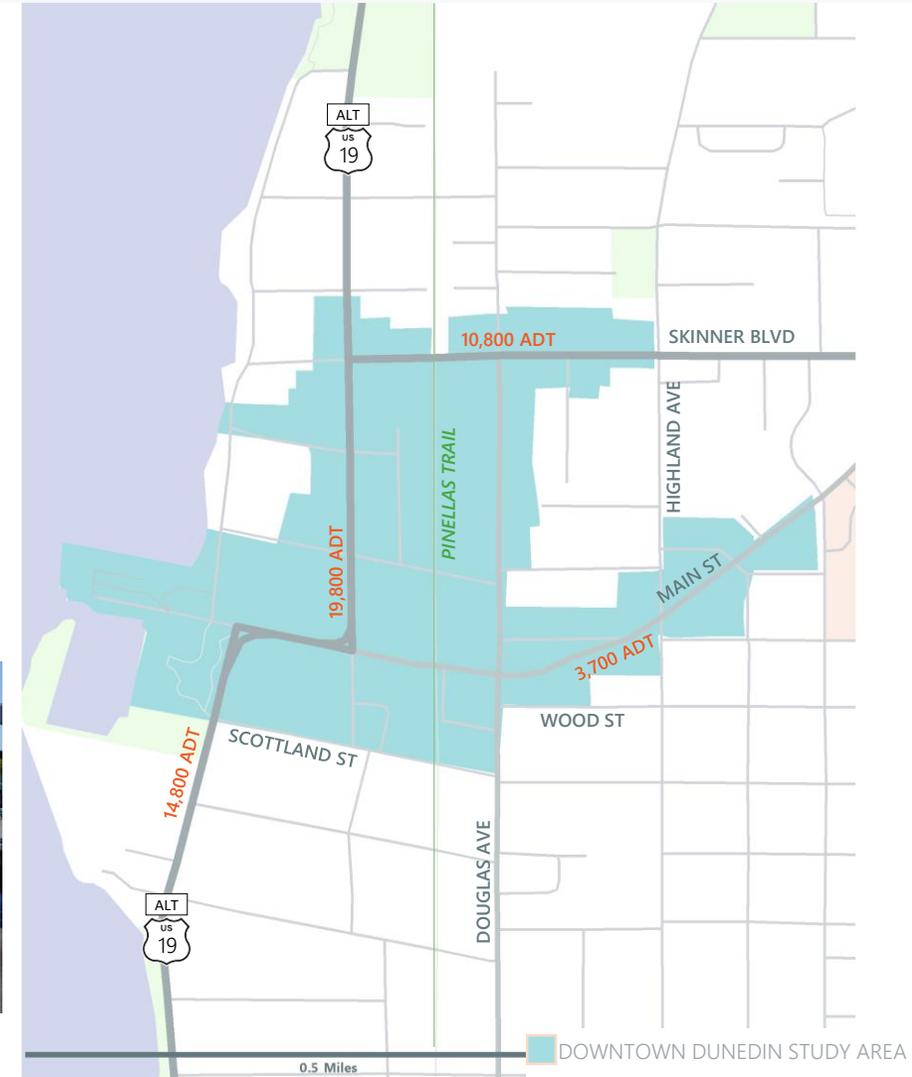
# CASE STUDY

## Dunedin, FL - Overview

- Downtown Dunedin contains a highly walkable main street with a variety of dining, entertainment and shopping options
  - Approximately 52 restaurants and bars within Downtown area
- High transportation accessibility
  - Pinellas Trail located within Downtown Dunedin
  - Adjacent to Intracoastal Waterway and Alt US-19
- Development scale ranges from older, historic downtown building strips to newer 2-3 story mixed-use developments



Image Sources: Dunedin Real Estate; Florida Department of Environmental Protection; Visit Florida™

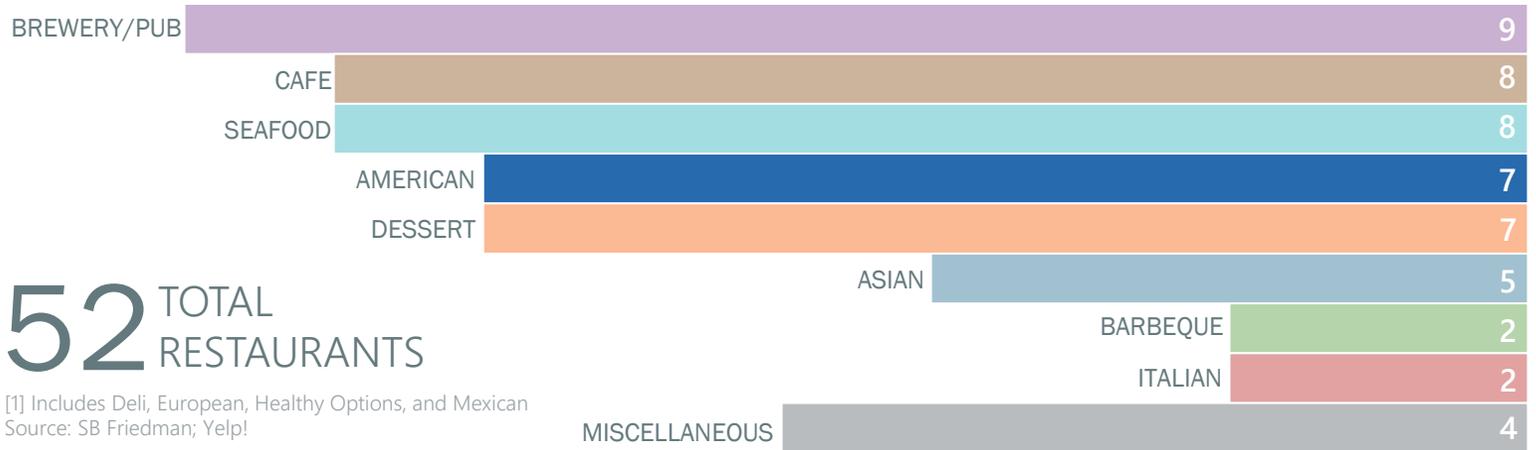


Source: Esri; Florida Department of Transportation; SB Friedman

# CASE STUDY

## Dunedin, FL – Restaurant Mix

- Approximately 52 restaurants and drinking places within Downtown Dunedin study area
- Distinct restaurant clusters within Downtown Dunedin
  - Main Street and Alt US-19 intersection, Pinellas Trail, Main Street and Highland Avenue intersection
- Higher representation of certain restaurant types and cuisines in Dunedin than in Indian Rocks Beach, including breweries and Asian cuisine
- Other cuisines without a presence in Indian Rocks Beach include barbeque, European fine dining, and “healthy” foods



**52** TOTAL RESTAURANTS

[1] Includes Deli, European, Healthy Options, and Mexican  
Source: SB Friedman; Yelp!



Source: Esri; SB Friedman

# TOURIST DEMAND

- Tourists are a key demand segment for restaurants in IRB
- There are approximately 251 hotel rooms ("keys") located within IRB
- High volume of keys in The Narrows
  - Adjacent to restaurant and retail cluster
- Visitors are likely to dine at local restaurants, increasing the demand for restaurants

**251** HOTEL ROOMS

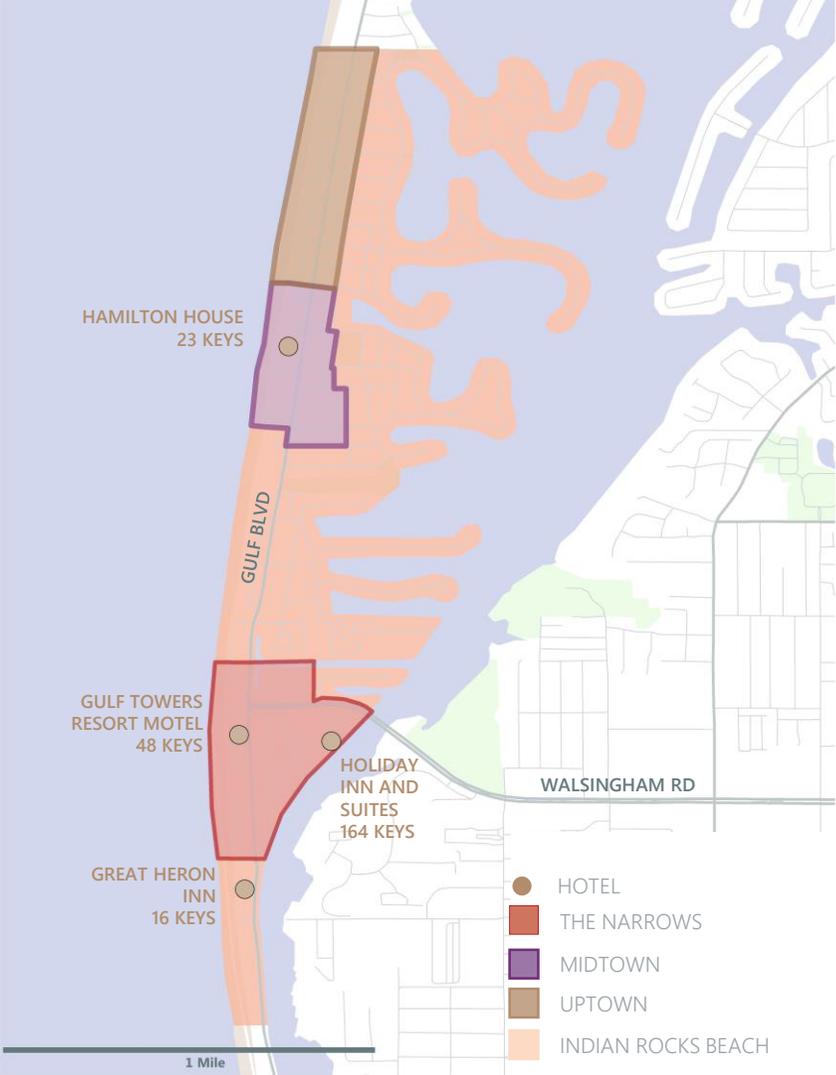
THE NARROWS<sup>[1]</sup>



MIDTOWN<sup>[2]</sup> 23

UPTOWN 0

[1] The Narrows total includes all hotel keys south of 6th Avenue  
 [2] Midtown counts include all hotels between 10th and 18th Avenues  
 Source: SB Friedman; Smith Travel Research



Source: City of Indian Rocks Beach; Esri; SB Friedman; Smith Travel Research

# CONCLUSIONS

## Potential for New Restaurant in IRB

- Restaurants in city primarily concentrated within The Narrows, catering to residents, visitors and tourists
- **Market Demand:** Due to the unique nature of independent restaurateurs, it is difficult to quantify market demand. Based on leakage analysis, IRB is currently oversupplied on the basis of residential population, however there may be potential for new restaurants. This would likely depend on:
  - Independent restaurateur interest
  - Ability to attract consumers from outside of IRB (either tourists or from elsewhere in Pinellas County/region)
  - Filling gaps in restaurant types and cuisines within the city: Asian, barbeque, breweries, healthy foods
- **Site:** There are sites in The Narrows and Uptown that could likely support new restaurant space
  - The Narrows: The Narrows has higher potential for attracting new restaurants due to the strength of the existing cluster. Creating a walkable restaurant cluster, building on the established cluster within The Narrows, could attract additional consumers needed to support new restaurants and establish IRB as a popular dining destination in the County
  - Uptown: Neighborhood-oriented restaurant in Uptown could attract visitors in VRBO units and/or provide amenity value in a mixed-use development

# MIXED-USE DEVELOPMENT

# MIXED-USE DEVELOPMENT

“Live, work, play”

Mixed-use developments aim to blend compatible land uses, public amenities and utilities at various scales and intensities; these developments often include a combination of the following revenue producing land uses

- Commercial (retail, restaurant, office)
- Residential
- Cultural or recreational

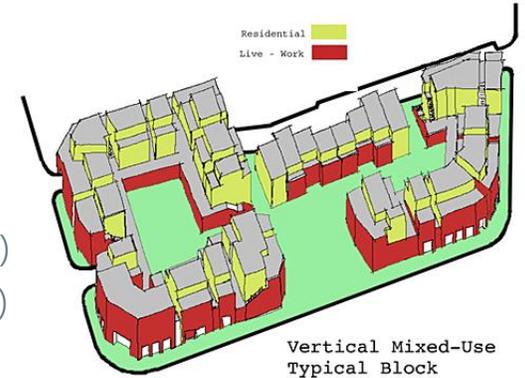
Benefits of mixed-use developments include:

- Reducing automobile dependency
- Creating a local sense of place
- Increasing housing options for various household types
- Activating urban areas for more hours of the day

Mixed-use developments can also range in scale, from buildings and sites to transit areas and regions

## Types of Mixed-Use Development

- Vertical Mixed-Use Development
  - Different uses within same building
  - Public uses on lower floors (commercial)
  - Private uses on upper floors (residential)



- Horizontal Mixed-Use Development
  - Single-use buildings within mixed-use district
  - Promotes walkability within area

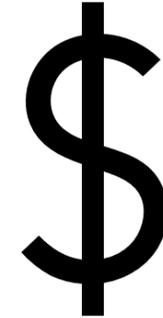
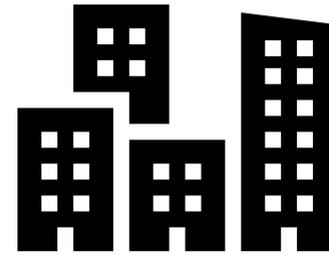
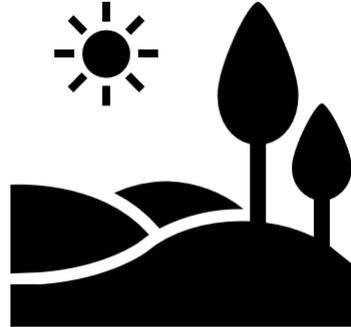


# MIXED-USE TYPES

## Three strategies for mixed-use development within the city

	TENANT-DRIVEN	AMENITY-DRIVEN	SPECULATIVE
	<p>Driven by existing tenants/owners</p> <p>Business strategy to diversify business in off-season with residential income</p>	<p>Driven by desire for amenities to serve VRBO development</p>	<p>Speculative development without identified tenants</p>
<b>Programming</b>	<p>Ground floor retail (tenant/owner); residential units above</p>	<p>Ground floor retail; residential and VRBO uses above</p>	<p>Ground floor retail; office, residential, or VRBO uses above</p>
<b>Opportunities/Challenges</b>	<ul style="list-style-type: none"> <li>• Potential driven by existing tenant-owners choosing to redevelop sites/buildings as mixed-use</li> <li>• Phasing/timing could be challenging with existing operating business</li> </ul>	<ul style="list-style-type: none"> <li>• Market may not be strong enough to support ground-floor commercial rents needed to support construction costs</li> <li>• Strong VRBO market may cross subsidize costs for retail buildout</li> <li>• Higher potential for vacancies</li> </ul>	<ul style="list-style-type: none"> <li>• Market may not be strong enough to support ground-floor commercial rents needed to support construction costs</li> <li>• Higher potential for vacancies</li> </ul>

# CONSIDERATIONS FOR SUCCESSFUL MIXED-USE DEVELOPMENT



## MARKET DEMAND

## SITE

## POLITICAL SUPPORT

## FINANCIAL

- Proposed uses must garner enough market demand on their own rights
- Uses should be complementary, creating synergy
- Competitive supply should be considered

- Appropriate site dimensions to support all elements of development including storm water management and parking
- Site is easily accessible and highly visible
- Attractive visual orientation and streetscapes
- Creating a sense of place and maintaining community character
- Successful integration of open spaces and buildings

- May require public sector support to facilitate land assembly and/or financial feasibility

- More difficult than single-use development due to complexities from incorporating multiple land uses (financing, construction, leasing, management)
- Longer development periods, especially if phasing is involved
- Higher risk perception for potential equity partners
- Higher construction costs than single-use development of same size and scale

# MIXED-USE TYPES

## Mixed-use development potential within the city

	The Narrows	Uptown	Midtown
<b>Development Potential</b>	Medium to higher potential based on conversations with existing owners	Lower to medium potential; there is interest in VRBO development	Lower potential
<b>Market Potential</b>	May be some potential for “tenant-driven” typology: ground floor retail (tenant/owner); residential/VRBO units above	May be potential for “amenity-driven” mixed-use: ground floor retail; residential/VRBO uses above	Limited potential for mixed-use development. Weaker retail market
<b>Site</b>	<ul style="list-style-type: none"> <li>• There may be large enough sites, but may require land assembly</li> <li>• Requires willing owner with the desire to develop mixed-use</li> </ul>	<ul style="list-style-type: none"> <li>• There may be large enough sites, but may require land assembly</li> <li>• Requires willing owner with the desire to develop mixed-use</li> </ul>	There are limited sites susceptible to change that could support mixed-use development in the near term
<b>Community Vision / Political Support</b>	May require public sector support	May require public sector support	Would likely require public sector support
<b>Financial Feasibility</b>	<ul style="list-style-type: none"> <li>• Phasing/timing could be challenging with existing operating business.</li> <li>• Achievable retail rents not as concerning if the tenant is the owner</li> </ul>	<ul style="list-style-type: none"> <li>• Market may not be strong enough to support ground-floor commercial rents needed to support construction costs</li> <li>• Strong VRBO market may subsidize costs for retail buildout</li> <li>• Higher potential for vacancies</li> </ul>	<ul style="list-style-type: none"> <li>• Market may not be strong enough to support ground-floor commercial rents needed to support construction costs</li> <li>• Higher potential for vacancies</li> </ul>

# CONCLUSIONS

# CONCLUSIONS

- Out of three commercial districts within the city, The Narrows currently has the strongest retail redevelopment potential
- Grocery:
  - **Market Demand:** Assuming city residents are willing to shop locally, Indian Rocks Beach, as a whole, may have sufficient demand to support a smaller-format grocer. In order to capture sufficient local demand, approximately 75% of residents would have to choose to purchase groceries locally within IRB.
  - **Site:** Assembly of land within The Narrows would be required to create large enough site. Further site capacity studies would be needed to determine if site(s) within The Narrows could offer adequate access and parking
  - **Community Vision/Political Support:** Grocery development could require collective community vision and City leadership to bring to fruition through a public-private partnership
  - **Financial Feasibility:** Financial feasibility was not studied as part of this analysis. Viability depends on land price, development typology, construction costs, and achievable rent levels
- Restaurant: The Narrows has the highest restaurant concentration within the city
  - **Market Demand:** New restaurant would depend on independent restaurateur interest, the ability to attract patrons from outside of the city (tourists or visitors within Pinellas County/region), and filling gaps in restaurant types and cuisines within the city
  - **Site:** There are sites in The Narrows and Uptown that could likely support new restaurant space
- Mixed-use development: Tenant-driven or amenity-driven mixed-use development may be possible in the near- to middle-term
  - Dependent on ability to assemble site, tenant-owner interest in redevelopment and financial feasibility
  - Would likely require community vision and City leadership to support complex redevelopment process through public-private partnership

# Limitations of Our Engagement

Our report is based on estimates, assumptions and other information developed from research of the market, knowledge of the industry and meetings during which we obtained certain information. The sources of information and bases of the estimates and assumptions are stated in the report. Some assumptions inevitably will not materialize, and unanticipated events and circumstances may occur; therefore, actual results achieved during the period covered by our analysis will necessarily vary from those described in our report and the variations may be material.

The terms of this engagement are such that we have no obligation to revise the report or to reflect events or conditions which occur subsequent to the date of the report. These events or conditions include without limitation economic growth trends, governmental actions, additional competitive developments, interest rates and other market factors. However, we are available to discuss the necessity for revision in view of changes in the economic or market factors affecting the proposed project.

Our study did not ascertain the legal and regulatory requirements applicable to this project, including zoning, other state and local government regulations, permits and licenses. No effort was made to determine the possible effect on this project of present or future federal, state or local legislation, including any environmental or ecological matters.

Further, we neither evaluated management's effectiveness, nor are we responsible for future marketing efforts and other management actions upon which actual results will depend.

Our report is intended solely for your information and for submission to financial institutions and developers, among others, and should not be relied upon by any other person, firm or corporation or for any other purposes. Neither the report nor its contents, nor any reference to our Firm, may be included or quoted in any offering circular or registration statement, appraisal, sales brochure, prospectus, loan or other agreement or any document intended for use in obtaining funds from individual investors.

We acknowledge that our report may become a public document within the meaning of the freedom of information acts of the various governmental entities. Nothing in these terms and conditions is intended to block the appropriate dissemination of the document for public information purposes.

# APPENDIX

# INDIAN ROCKS BEACH DEMOGRAPHIC PROFILE

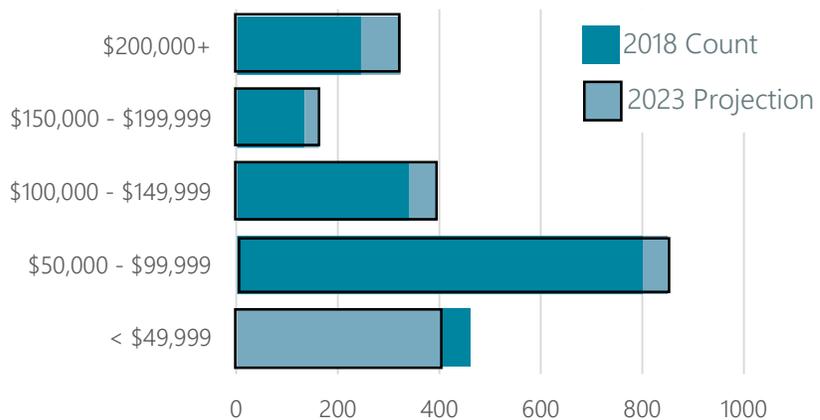
## Demographics

### Demographics

	2010	2018	2023 <sup>[1]</sup>	CAGR	
				2010 – 2018	2018-2023
Population	4,113	4,356	4,545	0.72%	0.85%
Households	2,189	2,284	2,370	0.53%	0.74%
Average Household Size	1.88	1.91	1.92	0.20%	0.10%
Median Household Income	N/A	\$70,687	\$79,976	N/A	2.50%
Per Capita Income	N/A	\$53,971	\$63,660	N/A	3.36%

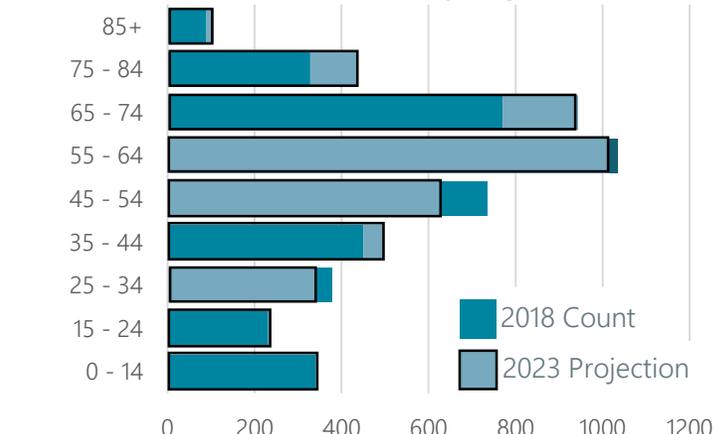
[1] Projected estimates  
Source: Esri; SB Friedman

### Households By Income

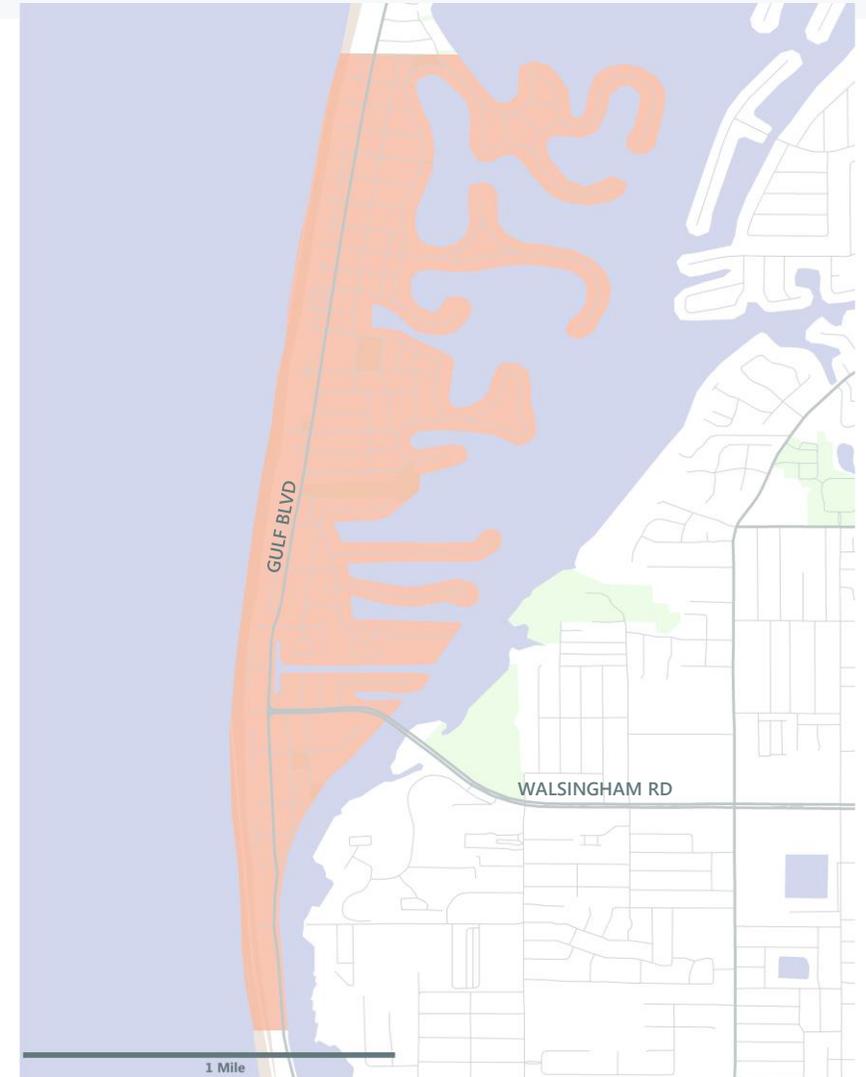


Source: Esri; SB Friedman

### Population by Age



Source: Esri; SB Friedman



Source: Esri; SB Friedman

# Retail Leakage Assessment

- As part of the convenience-retail market potential assessment, SB Friedman reviewed residential retail leakage for grocery and restaurant
- “Leakage” is the amount of demand from the trade area that is not met by the existing supply of businesses in the trade area and is the difference between retail demand (“retail potential”) and the retail supply (“retail sales”)
- **Grocery:** There is approximately \$15.11M in unmet residential grocery demand from local IRB residents
- **Restaurant:** Existing restaurant sales exceed local residential demand by \$8.5 million, indicating IRB may be oversupplied based on residential population alone. The additional restaurant sales is likely supported by tourism
- Restaurant leakage of \$8.5M based on residential population, indicating tourism supports current restaurant base

	Demand – Retail Potential	Supply – Retail Sales	Retail Gap
Grocery Store	\$15.77 M	\$0.66 M	\$15.11 M
Restaurant and Drinking Place	\$10.40 M	\$18.92 M	-\$8.52 M

Source: Esri; SB Friedman

# Competitive Grocery Assessment

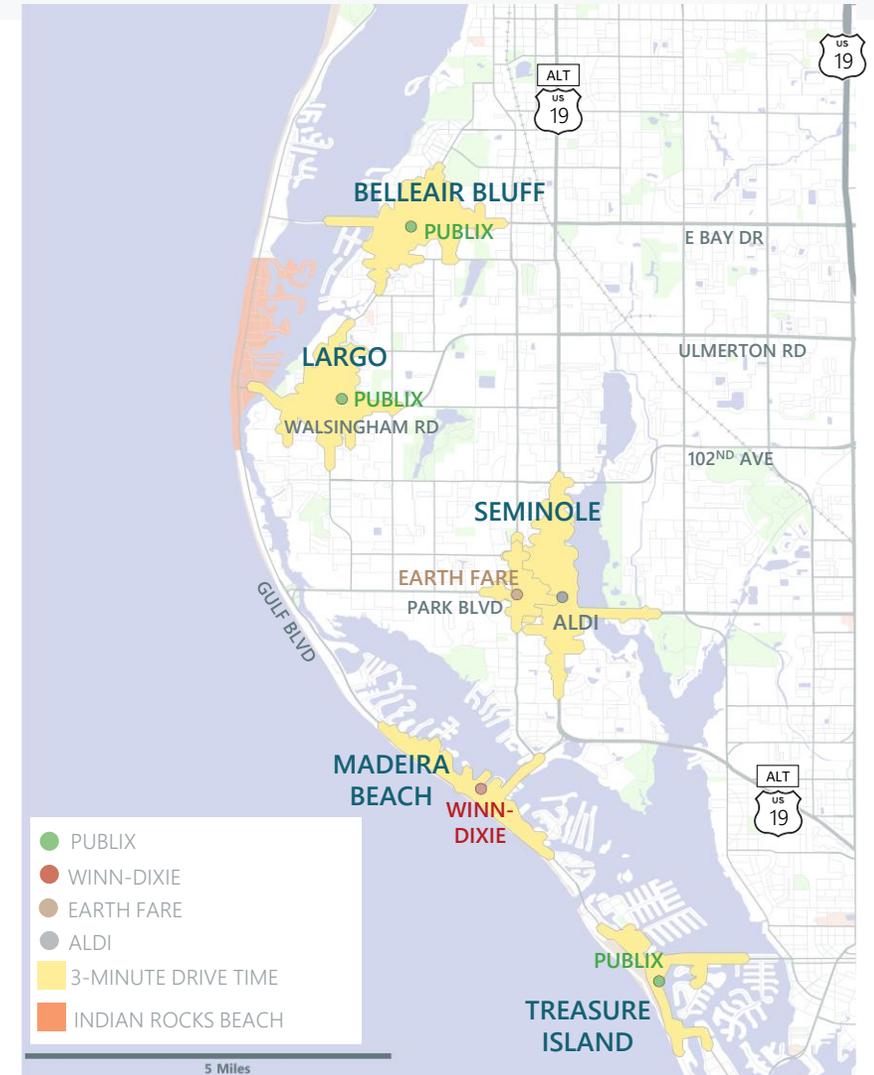
SB Friedman reviewed competitive grocery stores to understand total sales potential/SF

Identified grocery stores located within competitive beach front communities and nearby competitors to identify building size and sales volume

- Larger-format grocers typically generate annual sales volumes of over \$26 million
- Smaller-format grocers typically generate annual sales volumes of approximately \$12 million

	Publix	Publix	Winn-Dixie	Publix	Aldi	Earth Fare
<b>Format</b>	Larger-format	Larger-format	Larger-format	Larger-format	Smaller-format	Smaller-format
<b>Location</b>	Largo	Belleair Bluff	Madeira Beach	Treasure Island	Seminole	Seminole
<b>Building Size (SF)</b>	43,424 sf	62,004 sf	43,424 sf	71,692 sf	16,619 sf	23,796 sf
<b>Sales Volume</b>	---	\$34.2 M	\$38.0 M	\$26.6 M	\$11.7 M <sup>[1]</sup>	\$12.4 M
<b>Sales Volume Per Square Foot</b>	---	\$552	\$876	\$371	\$662	\$520

[1] Location opened October 2018; assuming \$662 per square foot in annual sales based on Aldi national average  
Source: Esri; Pinellas County Property Appraiser's Office; Retail TouchPoints; SB Friedman;





# Demographic and Income Profile

Indian Rocks Beach City, FL  
 Indian Rocks Beach City, FL (1233625)  
 Geography: Place

Prepared by Esri

Summary	Census 2010	2019	2024
Population	4,113	4,386	4,543
Households	2,189	2,301	2,378
Families	1,093	1,140	1,175
Average Household Size	1.88	1.91	1.91
Owner Occupied Housing Units	1,347	1,400	1,512
Renter Occupied Housing Units	842	901	866
Median Age	52.0	55.9	57.5
Trends: 2019 - 2024 Annual Rate	Area	State	National
Population	0.71%	1.37%	0.77%
Households	0.66%	1.31%	0.75%
Families	0.61%	1.26%	0.68%
Owner HHs	1.55%	1.60%	0.92%
Median Household Income	2.45%	2.37%	2.70%

Households by Income	2019		2024	
	Number	Percent	Number	Percent
<\$15,000	90	3.9%	78	3.3%
\$15,000 - \$24,999	153	6.6%	120	5.0%
\$25,000 - \$34,999	171	7.4%	146	6.1%
\$35,000 - \$49,999	327	14.2%	308	13.0%
\$50,000 - \$74,999	364	15.8%	352	14.8%
\$75,000 - \$99,999	310	13.5%	318	13.4%
\$100,000 - \$149,999	424	18.4%	467	19.6%
\$150,000 - \$199,999	240	10.4%	320	13.5%
\$200,000+	222	9.6%	269	11.3%
Median Household Income	\$77,842		\$87,841	
Average Household Income	\$105,673		\$120,326	
Per Capita Income	\$55,438		\$62,984	

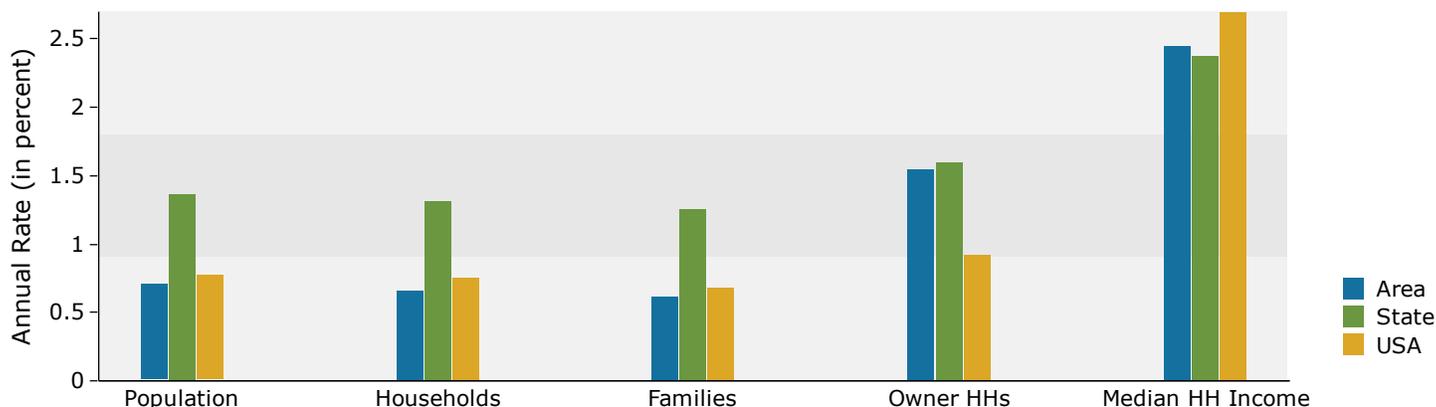
Population by Age	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	118	2.9%	105	2.4%	109	2.4%
5 - 9	136	3.3%	115	2.6%	112	2.5%
10 - 14	95	2.3%	119	2.7%	119	2.6%
15 - 19	135	3.3%	118	2.7%	146	3.2%
20 - 24	122	3.0%	110	2.5%	102	2.2%
25 - 34	377	9.2%	372	8.5%	333	7.3%
35 - 44	487	11.8%	457	10.4%	500	11.0%
45 - 54	849	20.6%	713	16.3%	627	13.8%
55 - 64	910	22.1%	1,026	23.4%	978	21.5%
65 - 74	539	13.1%	821	18.7%	965	21.2%
75 - 84	275	6.7%	337	7.7%	444	9.8%
85+	70	1.7%	93	2.1%	108	2.4%

Race and Ethnicity	Census 2010		2019		2024	
	Number	Percent	Number	Percent	Number	Percent
White Alone	3,958	96.2%	4,183	95.4%	4,305	94.8%
Black Alone	41	1.0%	50	1.1%	57	1.3%
American Indian Alone	9	0.2%	9	0.2%	9	0.2%
Asian Alone	27	0.7%	37	0.8%	44	1.0%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	23	0.6%	30	0.7%	37	0.8%
Two or More Races	55	1.3%	77	1.8%	91	2.0%
Hispanic Origin (Any Race)	210	5.1%	299	6.8%	370	8.1%

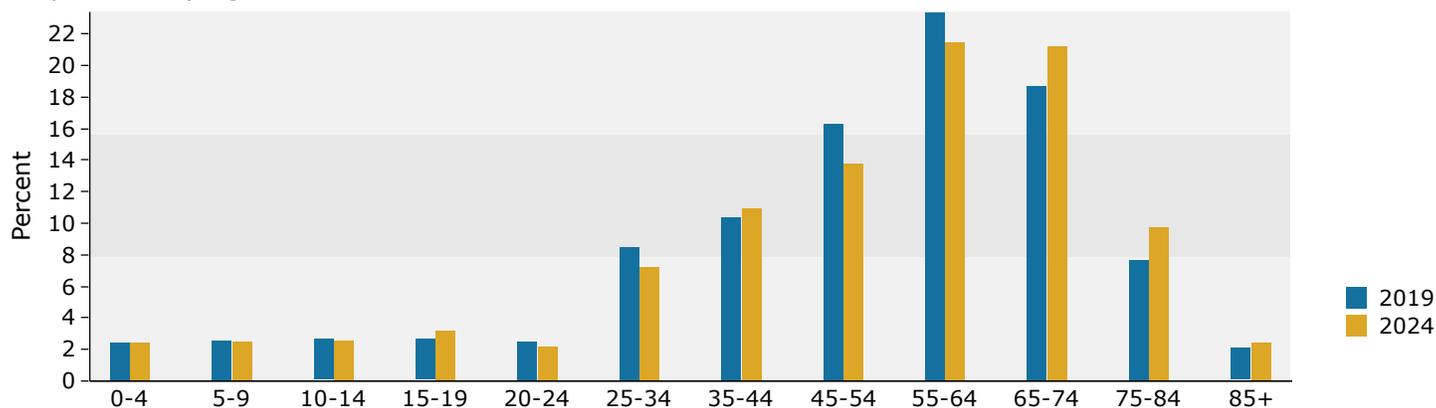
**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.

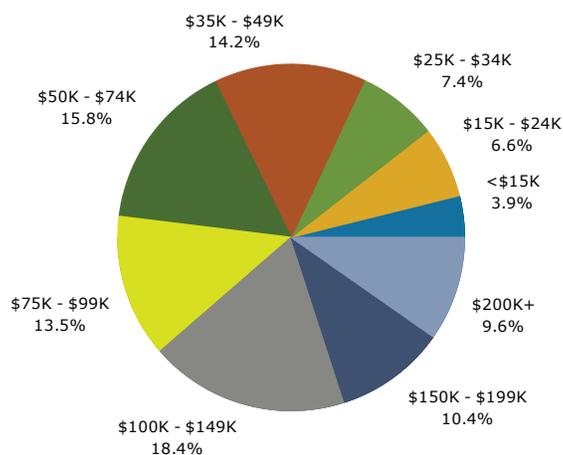
## Trends 2019-2024



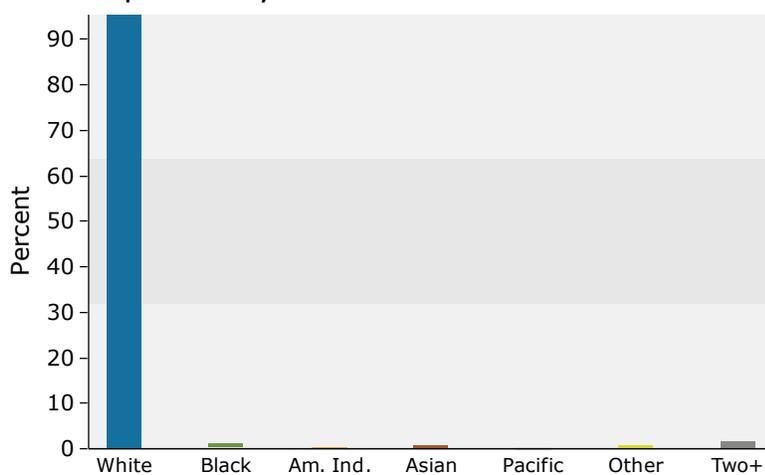
## Population by Age



## 2019 Household Income



## 2019 Population by Race



2019 Percent Hispanic Origin: 6.8%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2019 and 2024.



# Retail MarketPlace Profile

Indian Rocks Beach City, FL  
 Indian Rocks Beach City, FL (1233625)  
 Geography: Place

Prepared by Esri

## Summary Demographics

2019 Population	4,386
2019 Households	2,301
2019 Median Disposable Income	\$62,489
2019 Per Capita Income	\$55,438

## 2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$109,949,982	\$33,190,768	\$76,759,214	53.6	46
Total Retail Trade	44-45	\$99,551,210	\$14,266,462	\$85,284,748	74.9	19
Total Food & Drink	722	\$10,398,772	\$18,924,306	-\$8,525,534	-29.1	27

## 2017 Industry Group

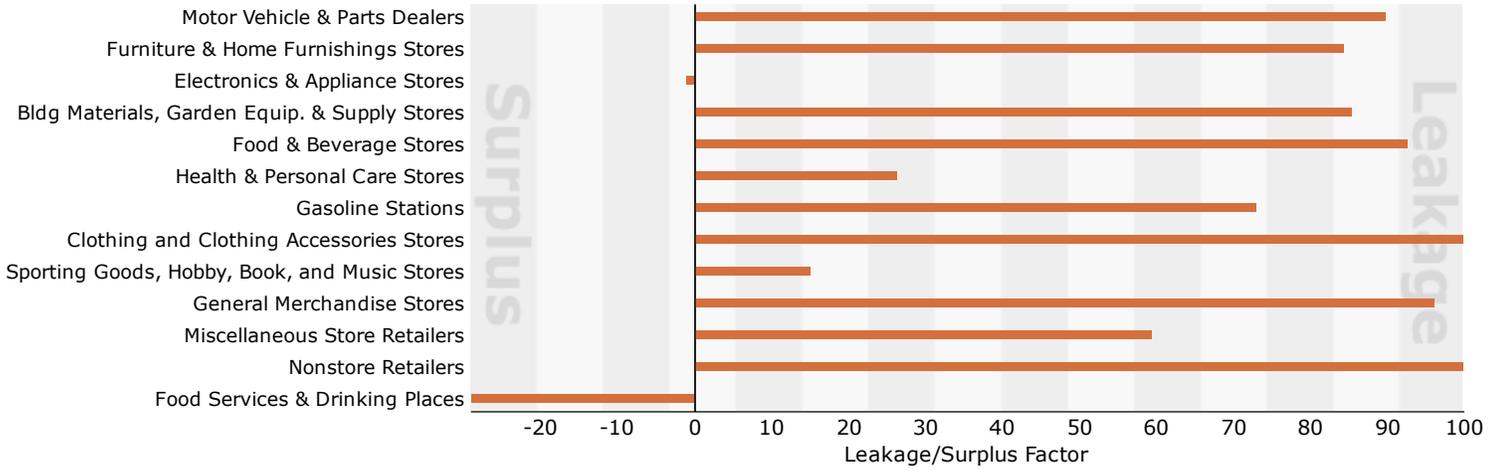
	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$21,551,391	\$1,151,144	\$20,400,247	89.9	2
Automobile Dealers	4411	\$17,096,428	\$457,027	\$16,639,401	94.8	1
Other Motor Vehicle Dealers	4412	\$2,562,499	\$694,117	\$1,868,382	57.4	1
Auto Parts, Accessories & Tire Stores	4413	\$1,892,464	\$0	\$1,892,464	100.0	0
Furniture & Home Furnishings Stores	442	\$3,572,912	\$302,118	\$3,270,794	84.4	2
Furniture Stores	4421	\$1,942,192	\$165,799	\$1,776,393	84.3	1
Home Furnishings Stores	4422	\$1,630,720	\$136,319	\$1,494,401	84.6	1
Electronics & Appliance Stores	443	\$2,830,521	\$2,898,978	-\$68,457	-1.2	2
Bldg Materials, Garden Equip. & Supply Stores	444	\$7,242,775	\$569,708	\$6,673,067	85.4	1
Bldg Material & Supplies Dealers	4441	\$6,665,648	\$569,708	\$6,095,940	84.3	1
Lawn & Garden Equip & Supply Stores	4442	\$577,127	\$0	\$577,127	100.0	0
Food & Beverage Stores	445	\$17,368,755	\$657,152	\$16,711,603	92.7	1
Grocery Stores	4451	\$15,772,086	\$657,152	\$15,114,934	92.0	1
Specialty Food Stores	4452	\$721,616	\$0	\$721,616	100.0	0
Beer, Wine & Liquor Stores	4453	\$875,053	\$0	\$875,053	100.0	0
Health & Personal Care Stores	446,4461	\$6,851,667	\$4,002,388	\$2,849,279	26.3	1
Gasoline Stations	447,4471	\$10,075,911	\$1,568,681	\$8,507,230	73.1	1
Clothing & Clothing Accessories Stores	448	\$4,868,469	\$0	\$4,868,469	100.0	0
Clothing Stores	4481	\$3,264,209	\$0	\$3,264,209	100.0	0
Shoe Stores	4482	\$719,515	\$0	\$719,515	100.0	0
Jewelry, Luggage & Leather Goods Stores	4483	\$884,745	\$0	\$884,745	100.0	0
Sporting Goods, Hobby, Book & Music Stores	451	\$2,388,450	\$1,761,813	\$626,637	15.1	5
Sporting Goods/Hobby/Musical Instr Stores	4511	\$1,984,718	\$1,761,813	\$222,905	5.9	5
Book, Periodical & Music Stores	4512	\$403,732	\$0	\$403,732	100.0	0
General Merchandise Stores	452	\$15,970,703	\$309,652	\$15,661,051	96.2	1
Department Stores Excluding Leased Depts.	4521	\$11,164,100	\$309,652	\$10,854,448	94.6	1
Other General Merchandise Stores	4529	\$4,806,603	\$0	\$4,806,603	100.0	0
Miscellaneous Store Retailers	453	\$4,105,426	\$1,044,828	\$3,060,598	59.4	3
Florists	4531	\$186,911	\$0	\$186,911	100.0	0
Office Supplies, Stationery & Gift Stores	4532	\$860,822	\$0	\$860,822	100.0	0
Used Merchandise Stores	4533	\$866,875	\$0	\$866,875	100.0	0
Other Miscellaneous Store Retailers	4539	\$2,190,818	\$1,044,828	\$1,145,990	35.4	3
Nonstore Retailers	454	\$2,724,230	\$0	\$2,724,230	100.0	0
Electronic Shopping & Mail-Order Houses	4541	\$2,210,414	\$0	\$2,210,414	100.0	0
Vending Machine Operators	4542	\$42,143	\$0	\$42,143	100.0	0
Direct Selling Establishments	4543	\$471,673	\$0	\$471,673	100.0	0
Food Services & Drinking Places	722	\$10,398,772	\$18,924,306	-\$8,525,534	-29.1	27
Special Food Services	7223	\$168,893	\$0	\$168,893	100.0	0
Drinking Places - Alcoholic Beverages	7224	\$874,569	\$0	\$874,569	100.0	0
Restaurants/Other Eating Places	7225	\$9,355,310	\$18,924,306	-\$9,568,996	-33.8	27

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. <http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

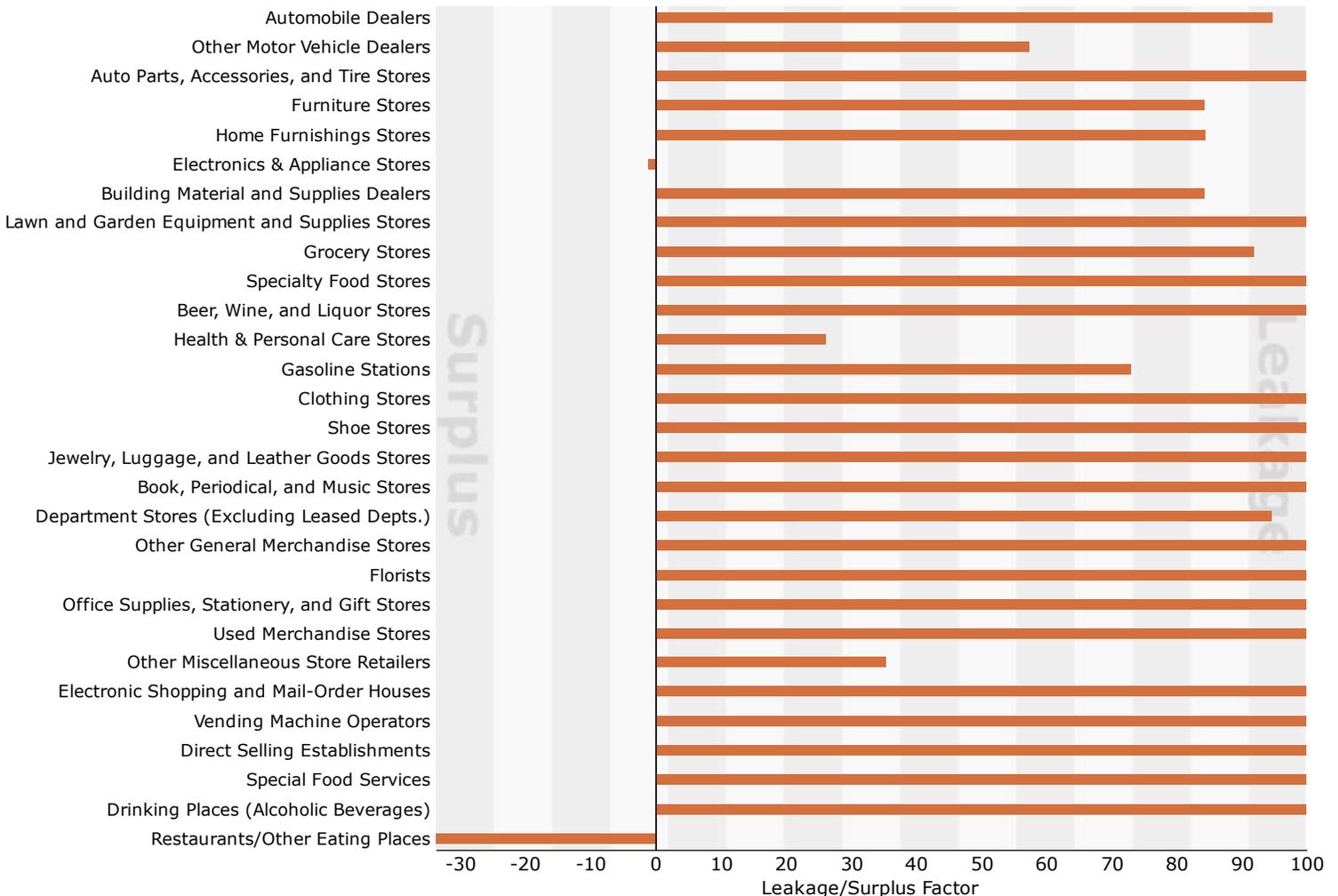
Source: Esri and Infogroup. Esri 2019 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2019 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.

November 29, 2019

## 2017 Leakage/Surplus Factor by Industry Subsector



## 2017 Leakage/Surplus Factor by Industry Group



## City of Indian Rocks Beach Community Visioning Study

### *The Indian Rocks Beach- Special Area Plan “A Vision for Growth and Development”*

#### **Memo of Findings**

The *Indian Rocks Beach- Special Area Plan “A Vision for Growth and Development”* was conducted in 2009 by the Florida Center for Community Design and Research, School of Architecture and Community Design at the University of South Florida for the City of Indian Rocks Beach. The purpose of the plan was to provide a long-range vision for the City to guide future growth and development. The plan identified the city’s three commercial areas: The Business District Triangle (referred to as the Narrows), the Midtown Commercial Area, and the Uptown Commercial Area, as focal points for future redevelopment activity. The plan includes recommendations for each commercial area based on public input. Many of the recommendations in the plan were implemented, however, there are some recommendations that were not due to various impediments that impacted the implementation. This memo will explore the key recommendations presented in this plan and potential challenges and opportunities to completing actions outlined in the plan moving forward. A key focus of City of Indian Rocks Beach Community Visioning Study is to explore whether the community is still interested in pursuing the vision that was outlined in this plan. The first step is to evaluate and explore the original vision identified in this plan. The next step in visioning process for the 2020 study is to conduct an analysis of demographic and market data, conduct stakeholder interviews and public workshops to gain input, and develop an updated vision that reflects the goals and priorities of the community.

#### **The Narrows**

The original vision for the Narrows consisted of revitalizing the existing business district and promoting mixed-use development to create a “village center” vibe, with the incorporation of streetscaping and infrastructure expansion. At the time, the region had a variety of small-scale commercial uses, without much private-sector investment. The 2009 plan recommended expanding basic infrastructure such as parking and stormwater/drainage improvements, as well as a recommended phasing plan and potential regulatory changes to promote the scale and type of development envisioned for the area. The plan identified three regulatory restrictions to future development: “two habitable floors over parking; relief from on-site parking requirements; and relief from on-site stormwater requirements.”<sup>1</sup> The plan also proposed a regional stormwater pond in Chick-A-Si Park to address the on-site stormwater requirements of the Southwest Florida Water Management District (SWFMD). It also proposed consideration of a joint-use central parking facility to offset on-site parking requirements.

#### Implementation Challenges and Opportunities

Based on the feedback received from the Visioning Study public workshop and stakeholder interviews, the “village center” vibe envisioned for the Narrows is on target with the vision the community is hoping to see for the future of Indian Rocks Beach. The Special Area Plan proposed a development program that

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<sup>1</sup> *Indian Rocks Beach- Special Area Plan “A Vision for Growth and Development”* City of Indian Rocks Beach, Florida. June 2009. Florida Center for Community Design and Research, School of Architecture and Community Design, University of South Florida.

features a gradual, twenty-year expansion of the existing “commercial base” in the Narrows. The type of development identified as most applicable to the area are mixed-use buildings ranging between 20,000 and 30,000 square feet. The plan does propose some increases in density and intensity for select parcels up to four and six stories. However, in meetings with the community, they expressed the desire for small-scale development, a small-town atmosphere, and a cohesive neighborhood feel. Development above three stories is not desired by the community at this point. Additionally, the City of Indian Rocks Beach is within the Coastal High Hazard Area as defined by Section 163.178(2)(h)9, Florida Statutes. This means that the community lies below the elevation of the category 1 storm surge line as established by the Sea, Lake, and Overland Surges from Hurricanes (SLOSH) computerized storm surge model. Any increases in residential density in this area must be offset by appropriate mitigation measures as outlined in the Countywide Rules. The City is also in a Special Flood Hazard Area as designated by the Federal Emergency Management Agency (FEMA), which means all parcels are required to have a flood insurance policy, and any new construction must be elevated above Base Flood Elevation (BFE) to receive flood insurance.

When considering additional restrictions to the implementation of recommendations proposed in the Special Area Plan, the requirement of two habitable floors over parking facilities is now in the Preservation Zoning District and the Neighborhood Mixed-Use Zoning District regulations. Currently, it appears that only a few parcels are zoned either preservation or neighborhood mixed use. Parcels rezoned as preservation do not allow for dwelling units, the only parcels that allow for dwelling units in the preservation zoning district are those that are existing nonconforming units.

The feasibility of the construction of a stormwater pond in Chick-A-Si park and a joint-use central parking facility to offset on-site parking requirements will need to be further explored. A community parking study would help to identify if parking is needed and where it is needed. Regarding the stormwater pond, it is necessary to discuss with SWFMD as to whether this project would be enough to offset on-site stormwater requirements, and to discuss with the community as to whether this is an option for stormwater mitigation that they would be willing to consider. Since this plan was developed in 2009, several parcels were developed in the Narrows, including the Splash Harbor Condos and the waterpark, which were built across the street from Chick-A-Si park. While retail business owners expressed interest in a central parking facility during stakeholder interviews, concerns over costs and funding as well as impacts to neighborhood character were voiced during the discussion. Regarding other recommendations such as coordination of various Special Area Plans with the City’s Comprehensive Plan, it is important to confirm that the scale and type of development proposed for the area is consistent with these requirements. This study will help to inform updates to the Indian Rocks Beach Comprehensive Plan, which is currently underway. Recommendations such as phased streetscaping plans could provide beneficial public realm improvements for the Narrows and build a sense of placemaking that the community expressed as a desire for the City.

### **The Midtown and Uptown Commercial Areas**

The original vision for the Midtown and Uptown Commercial Areas consisted of vital neighborhood commercial areas with active business districts. Through a strategy that incorporates infill development, renovations to existing development, and public realm improvements, a more cohesive commercial area could form. During plan development both areas had a series of smaller scale commercial uses with little

connectivity. The plan recommended consideration of the modification of land development regulations in these areas as well. The plan cited the 25-foot setback requirement as a hinderance to development, and potentially limits pedestrian scale design. The plan also proposed that the City establish a requirement for buildings with a commercial use located on the ground level to provide amenities for pedestrian use such as wider sidewalks and sidewalk cafés, covered areas, balcony overhangs, and continuing storefronts, and parking should be placed to the rear of buildings. There is very limited parking in the Midtown area, and no public parking other than on the streets with beach accesses in the Midtown and Uptown Commercial Areas. Revisions to the project approval process to allow more flexibility were also cited as a concern to allow for the construction of suitable building types and other infrastructure considerations to be incorporated into the commercial areas.

### Implementation Challenges and Opportunities

Revisions to the land development regulations and project approval process will need to be considered by the City of Indian Rocks Beach. The 25-foot setback requirement from Gulf Boulevard promotes automobile-oriented development, as on-site parking requirements are more likely to be addressed in the front of the building rather than to the rear of the property, discouraging human scale street side development. Additionally, it was recommended that buildings with commercial use on the ground level be required to incorporate public realm amenities such as sidewalk areas and pedestrian plazas. These requirements could potentially promote pedestrian use, and consideration of their incorporation is recommended. Phased streetscaping plans could provide beneficial public realm improvements for the Midtown and Uptown Commercial Areas as well. Currently, the revenues generated from the Penny 4 Pinellas program are being used by Pinellas County to underground the utilities. However, an unintended consequence of this project is that underground utilities impact a community's ability to plant street trees and other landscaping, which should be considered during this process.

Other recommendations in the plan included the rezoning of the eastern half of the block between 25<sup>th</sup> and 26<sup>th</sup> Avenues to "Business" to allow for more flexibility of mixed-use development. These parcels are currently zoned for Medium Density Residential use which does not allow for mixed-use development and rezoning these parcels to "Business" would allow for the incorporation of this use. Also, Planned Unit Developments (PUDs) would allow for the incorporation of mixed-use development, and are currently allowed in every zoning district except for the Single-Family Residential zoning district. The plan states that incorporation of a mixed-use development at 25<sup>th</sup> Avenue could promote the development of a continuous, "economically stable, linear commercial district from 22<sup>nd</sup> Avenue to 28<sup>th</sup> Avenue."<sup>2</sup> However, it is important to consider the potential impacts of rezoning these parcels to allow for mixed-use in an established residential area. The long-term vision identified for the Uptown Commercial Area was the development of a "main street like" vibe along Gulf Boulevard. The plan recommended attracting a "mid-size retail anchor" to promote redevelopment in the Uptown Commercial Area. However, a "mid-size retail anchor" may not be feasible according to the retail market assessment that was conducted as part of the 2020 study. While development in the Midtown Commercial Area is somewhat restricted due to the limited availability of land, the Uptown Commercial Area has some development potential along Gulf Boulevard, but most likely for smaller-scale commercial development.

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<sup>2</sup> Ibid

## Conclusions

The Special Area Plan identified several key recommendations for incorporation in Indian Rocks Beach. While many recommendations were implemented, some were not due to barriers such as land use regulations and financing. The recommended changes to the land development code were not implemented and were reviewed as part of the 2020 study and will need to be reviewed by the City for their consideration. Funding mechanisms such as public-private partnerships and others could provide the investment needed for desired infrastructure improvements and should be considered. Residents and stakeholders of Indian Rocks Beach still expressed interest in pursuing a “village center” vibe, with small scale development and retail. These considerations will be incorporated into the update of the vision for Indian Rocks Beach moving forward.

## **CITY OF INDIAN ROCKS BEACH GULF BOULEVARD VISIONING STUDY PUBLIC VISIONING WORKSHOP MEETING SUMMARY**

June 19, 5-7 PM  
Indian Rocks Beach City Hall, 1507 Bay Palm Blvd

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The Indian Rocks Beach Gulf Boulevard Visioning Study Public Visioning Workshop kicked off at 5 PM with welcoming remarks from Indian Rocks Beach Mayor Joanne “Cookie” Kennedy. Whit Blanton, Executive Director of Forward Pinellas, introduced the project team in attendance, which consisted of Christina Mendoza and Hilary Lehman from Forward Pinellas, and Geoff Dickinson, Caitlin Amos, and Pasan Perera from SB Friedman. Christina Mendoza was introduced as the project manager for the visioning study. Whit stated that the team from SB Friedman will be conducting a retail market analysis as part of the study. The retail market analysis will evaluate retail market potential and economic feasibility for various land uses within the community. Their research will be incorporated into the visioning study.

Following introductions, Whit provided a brief overview of Forward Pinellas as an organization, and its roles and responsibilities. He reviewed the meeting purpose and introduced the group activity session. Meeting attendees were asked to provide up to 5 key outcomes they would like to see from this community visioning effort. Responses were recorded on sticky notes and placed on a wall in the auditorium. Team members then organized the notes around common themes.

Following the group activity, Whit provided an overview of the study goals and objectives. The purpose of the visioning effort is to develop guiding principles that will be used to define specific strategies, policies and actions designed to shape the future of Indian Rocks Beach in a way that reflects the goals and priorities of the residents. SB Friedman provided an overview of the retail market analysis they will be conducting to provide analytical support for the viability of certain types of development in the city.

The sticky notes from the group activity session reflected several overall topics, and used as a kick off for further discussion with the participants. Major topics that emerged from the discussion include:

### Transportation

- The use of golf carts and electric vehicles within the community
- The use of rideshare services and their impact on curb space and parking
- Traffic congestion along corridor, north end of Indian Rocks Beach, at Walsingham Rd, and bottlenecks throughout the community
- High traffic speeds on Gulf Blvd
- Visibility of vehicles turning onto Gulf Blvd from cross streets
- Concern over parking availability and location
- Trolley service- would like more clarity on routes
- Bicycle and pedestrian safety improvements – bike lanes/ crosswalks/ design speed of roadways/ explore alternative routes to biking/ walking along Gulf Blvd/ promote walkability

### Development

- Interest in maintaining the “small-town” vibe in the community
- No large scale high rise development

- Concern over vacation rentals – would like to regulate
- Concern over the number of vacant lots
- Public art to help reinforce an “identity” in the community
- Promote locally owned businesses/restaurants
- Create aesthetically consistent design guidelines
- Mixed-use considerations
- Identified uses that are missing:
  - Office space
  - Gourmet/ healthy grocery stores
  - Reciprocal with Pinellas County Library System
  - High-end upscale restaurants

### Infrastructure

- Burying power lines
- Underground utilities
- Signage – too cluttered
- Incorporation of Streetscaping
- Drainage – concern over flooding and puddling

Following the discussion, Whit closed the meeting with some final remarks, and thanked participants for attending. The kick-off workshop occurred after a day of individual and small group interviews the team held with several business owners, residents and elected officials in the city. The interviews were designed to help understand some of the issues from different perspectives. The next workshop will be scheduled for September, with the project to be completed by the end of the year.

Some participants asked if additional meetings could be coordinated between members of the project team and individual residents or businesses to discuss ideas. There will be continuing opportunities for this kind of dialogue. Any project updates will be posted on project webpage on the Forward Pinellas website: <http://forwardpinellas.org/projects/indian-rocks-beach-visioning-study/>. In addition, participants who signed in at the meeting will be notified of upcoming meetings. For questions regarding the project, please contact Christina Mendoza, at 727-464-5693, or [cmendoza@forwardpinellas.org](mailto:cmendoza@forwardpinellas.org).



**FORWARD  
PINELLAS**  
Integrating Land Use & Transportation



## **CITY OF INDIAN ROCKS BEACH GULF BOULEVARD VISIONING STUDY PUBLIC VISIONING WORKSHOP MEETING SUMMARY**

**October 1, 5-7 PM  
Indian Rocks Beach City Hall, 1507 Bay Palm Blvd**

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The Indian Rocks Beach Gulf Boulevard Visioning Study Public Visioning Workshop kicked off at 5 PM with welcoming remarks from Indian Rocks Beach Mayor Joanne “Cookie” Kennedy. Whit Blanton, Executive Director of Forward Pinellas, introduced the project team in attendance, which consisted of Rodney Chatman, Christina Mendoza, Jared Austin, and Hilary Lehman from Forward Pinellas. Whit reviewed the meeting purpose and discussed questions the agency has been receiving related to vacation rentals. He then provided an overview of general study updates: the retail market assessment is nearing completion and results will be presented near the end of the Visioning Study, the review of previous plans and studies has been completed, the data summary is in progress, mapping for scenario building is starting, and the indicators analysis is starting.

Christina Mendoza reviewed the existing conditions analysis that was conducted to identify potential peer communities based on ESRI’s Tapestry profile data from Indian Rocks Beach. The profile data identified socioeconomic and demographic characteristics to show similarities between Indian Rocks Beach and other communities in Florida. Peer communities examined include: Flagler Beach, Melbourne Beach, Dunedin, Safety Harbor, Anna Maria Island, and Siesta Key. The identified communities were researched further to examine potential land use strategies and incentives for development growth and retail potential that have been used in these areas and may be applicable in IRB. For example, the City of Bradenton Beach on Anna Maria Island has a similar median home value and household income, and the development within the City is similar in scale and type to IRB. The City’s restrictions on height reflect similar characteristics to IRB.

Some of the identified strategies were presented in an interactive feedback session with the community to discuss their opinions, thoughts, and ideas. During the interactive feedback session, meeting attendees were seated in groups and asked to provide input on a series of questions which can be found on the second page of this summary. The questions were meant to determine the community’s overall opinion of a series of development strategies and elements, the incorporation of mixed-use development, height of commercial development, and parking strategies. Responses were recorded and turned into the project team for review. Following the activity, each group reported out their general comments on the questions.

Based on the feedback received, key topics for future discussion and consideration include:

- Architectural treatments for new development- concern over maintaining community identity
- Consideration of sidewalk cafes- may be applicable in certain areas, based on context
- Use the Planned Unit Development process to develop site plans as a potential strategy in certain areas
- Require developers to construct off-site public infrastructure (i.e., utilities, sidewalks, bicycle racks, public art, etc.) could be a consideration
- Work with developers to provide more parking in commercial areas
- Preservation of historic assets, and maintenance of existing community character and form
- Discussion of transportation safety

Following the discussion, Whit closed the meeting with some final remarks, and thanked participants for attending. The next workshop will be scheduled for November, with the project to be completed by early next year. Any project updates will be posted on project webpage on the Forward Pinellas website: <http://forwardpinellas.org/projects/indian-rocks-beach-visioning-study/>. In addition, participants who signed in at the meeting will be notified of upcoming meetings. For questions regarding the project, please contact Christina Mendoza, at 727-464-5693, or [cmendoza@forwardpinellas.org](mailto:cmendoza@forwardpinellas.org).

## Interactive Feedback Session

1. **Please rank each option on a scale of 1 to 5, 1 meaning you are strongly against this option and 5 meaning you strongly support this option. You will have 15 minutes.**

### Potential development strategies and elements:

- a. **Architectural treatments for new development** (creating architectural standards for new development)
- b. **Development that makes accommodations for sidewalk cafes** (ensuring that when development is approved, it includes expanded sidewalks for café uses and public spaces)
- c. **Offer limited financial incentives for the desired uses (i.e., grocery store)** (City offers limited incentives to developers for them to locate certain uses in IRB)
- d. **Partner to offset certain development costs** (City subsidizes part of a development project to reduce costs to the developer)
- e. **Jointly develop a site plan** (City works with developer on a site plan to design a project to meet the needs of both parties)
- f. **Develop flexible parking standards** (make on-site parking requirements less stringent to allow for more flexibility in development)
- g. **Streamline site plan approval process** (improve the efficiency of the site plan process to get projects approved more quickly)
- h. **Development incentives such as reimbursement of impact fees, mobility fees, etc.** (City offers incentives to developers to promote development to locate in IRB)
- i. **Aggressively market select properties to developers on behalf of owner(s)** (City markets certain properties where development is desired on behalf of property owners)
- j. **Provide off-site public infrastructure (i.e., utilities, transit shelter, bike racks, public art, etc.)** (City allows developers to provide off-site public infrastructure in return for potential concessions on development standards)
- k. **Approve specific code variances and/or waivers to development standards** (City allows developers to have specific code variances and/or waivers to development standards in return for any concessions made for City requests related to project design and/or construction)

- I. Please note if you have any ideas for other strategies and/or elements**
- 2. Through discussions with various stakeholders, many identified mixed-use construction as a desired type of development within the community. What are your thoughts? You will have 5 minutes.**
- 3. What do you think the maximum height (i.e., number of stories) of a commercial structure should be along Gulf Boulevard? You will have 5 minutes.**

Currently the zoning code allows the following heights for commercial structures:

- Business Zoning District, Neighborhood Mixed Use Zoning District, Professional Office Zoning District= 35' (approx. 3 stories)
  - High Density Commercial Tourist Zoning District, High Density Commercial Tourist Zoning District 1= 46' (approx. 4 stories)
- 4. To address parking challenges, options such as construction of a parking deck, garage or surface parking lot have been proposed. What are your thoughts? You will have 5 minutes.**
  - 5. Please rank each option on a scale of 1 to 5, 1 meaning you are strongly against this option and 5 meaning you strongly support this option. You will have 5 minutes.**

**What type of funding strategies should be explored to address parking challenges?**

- a. Metered parking within the business district
- b. Public/private partnership with business owners
- c. Explore tax/millage rate options
- d. Explore bonding or loans

## **CITY OF INDIAN ROCKS BEACH GULF BOULEVARD VISIONING STUDY PUBLIC VISIONING WORKSHOP MEETING SUMMARY**

November 19, 5-7 PM  
Indian Rocks Beach City Hall, 1507 Bay Palm Blvd

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The Indian Rocks Beach Gulf Boulevard Visioning Study Public Visioning Workshop kicked off at 5 PM with welcoming remarks from Indian Rocks Beach Mayor Joanne “Cookie” Kennedy. Whit Blanton, Executive Director of Forward Pinellas, introduced the project team in attendance, which consisted of Rodney Chatman, Christina Mendoza, Jared Austin, Hilary Lehman, Linda Fisher, Sarah Caper, and Maria Kelly from Forward Pinellas. Whit reviewed the meeting purpose and introduced Christina Mendoza who continued the presentation.

Christina reviewed the four key overarching themes that were identified to summarize the public input the study team received and the data gathered. The four key themes identified were: Economic Vitality, Community Character, Transportation and Mobility, and Quality of Life and Environmental Protection. These themes will be used to shape the vision for Indian Rocks Beach. The presentation provided an overview of what the study team has learned in regard to each theme, and strategies the community could consider to address key elements under each theme. The study team also presented a series of guiding principles for each theme that the community will use in the implementation of its vision, and asked for feedback on the guiding principles from the community.

During the interactive feedback session, meeting attendees were seated in groups and asked to develop vision statements as related to each theme. Each group was assigned a theme, and Forward Pinellas staff aided in the facilitation of the visioning exercise. Each group was given a series of key words that they could use in the development of their vision statements. Each member of the group was asked to select five words that best represent what they envision for their community as related to their assigned theme. The groups had the option of adding additional words to the list by group consensus. After each group member selected their top five words, they reported them to the staff facilitator in their group and the facilitator tallied up all the words. The top 3-5 were used for the formulation of a vision statement. If a group finished their activity early, they were given the option of writing a vision statement for a second theme of their group’s choosing. Following the activity, each group reported out their vision statements and turned them in to the study team for use in the report.

Vision statements developed include:

- Economic Vitality
  - *We envision a vital local economy that is nourished by community support, where businesses are accessible and where visitors, residents, and business owners share a sense of belonging. In this community, we live, work, and play with the beach always in sight.*
- Community Character
  - *Our community should have an “Old Florida” feel that allows for small scale development while preserving the character of a small town atmosphere.*
  - *To preserve a walkable historic beach village and encourage our neighborhood vibe.*

- *We want to preserve our small town atmosphere and provide a walkable community. We realized growth is inevitable and we would like to encourage small scale development and promote our “Old Florida” feel.*
- Transportation and Mobility
  - *Welcome to paradise where we strive for a congestion free, walkable, bikeable community that promotes and values safety.*
- Quality of Life and Environmental Protection
  - *IRB is a thriving beach community focused on small town values while providing a livable and clean environment with a passion for beach protection and preservation.*
  - *Maintaining a small town beach community feel while protecting wildlife and securing a safe and liveable environment for all to enjoy!*

Following the visioning exercise, Whit closed the meeting with some final remarks, and thanked participants for attending. The final presentation of the Community Visioning Study will take place at a City Commission Meeting on February 13, 2020. Any project updates will be posted on project webpage on the Forward Pinellas website: <http://forwardpinellas.org/projects/indian-rocks-beach-visioning-study/>. For questions regarding the project, please contact Christina Mendoza, at 727-464-5693, or [cmendoza@forwardpinellas.org](mailto:cmendoza@forwardpinellas.org).

# INDIAN ROCKS BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC WORKSHOP



June 19, 2019 6:00 P.M.

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# INDIAN ROCKS BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC WORKSHOP



June 19, 2019 6:00 P.M.

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MARIE + RAY COX	RESIDENT	COXEMAIL@AOL.com



# Indian Rocks Beach Gulf Boulevard Visioning Workshop

Wednesday, June 19, 2019 from 5:00 PM to 7:00 PM (EDT)  
 Indian Rocks Beach City Hall - 1507 Bay Palm Boulevard - Conference Room - Indian Rocks Beach, FL 33785

	Last Name	First Name	Qty	Ticket Type	Payment Status
<input type="checkbox"/>	Ashby	John and Becky	1	RSVP	Free Order Order 62065570793-967867883
<input type="checkbox"/>	Ashby	John and Becky	1	RSVP	Free Order Order 62065570793-967867883
<input type="checkbox"/>	Bond	Jude	1	RSVP	Free Order Order 62065570793-954925038
<input type="checkbox"/>	Bond	Jude	1	RSVP	Free Order Order 62065570793-954925038
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<input type="checkbox"/>	Britz	Carol and Randy	1	RSVP	Free Order Order 62065570793-968836756
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<input type="checkbox"/>	Cisarik	Kelly	1	RSVP	Free Order Order 62065570793-958128993
<input type="checkbox"/>	Clark	Robert	1	RSVP	Free Order Order 62065570793-969505879
<input checked="" type="checkbox"/>	Dausies	Adrienne	1	RSVP	Free Order Order 62065570793-969491617
<input checked="" type="checkbox"/>	De Bow	Joseph	1	RSVP	Free Order Order 62065570793-962714076
<input checked="" type="checkbox"/>	Flynn	Beth	1	RSVP	Free Order Order 62065570793-954915035
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<input type="checkbox"/>	Heshmati	Maria and Ira	1	RSVP	Free Order Order 62065570793-959567184
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<input checked="" type="checkbox"/>	Holmes	Scott	1	RSVP	Free Order Order 62065570793-969499771
<input checked="" type="checkbox"/>	Johnson	R.B.	1	RSVP	Free Order Order 62065570793-959686287
<input checked="" type="checkbox"/>	Labadie	Jim	1	RSVP	Free Order Order 62065570793-959618342
<input checked="" type="checkbox"/>	Labadie	Jim <i>Laura</i>	1	RSVP	Free Order Order 62065570793-959618342
<input checked="" type="checkbox"/>	Lover	Lorna	1	RSVP	Free Order Order 62065570793-968213615

## Indian Rocks Beach Gulf Boulevard Visioning Workshop

	Last Name	First Name	Qty	Ticket Type	Payment Status
<input type="checkbox"/>	Lover	Lorna	1	RSVP	Free Order Order 62065570793-968213615
<input type="checkbox"/>	Lover	Lorna	1	RSVP	Free Order Order 62065570793-968213972
<input checked="" type="checkbox"/>	McDarby	Jason	1	RSVP	Free Order Order 62065570793-956790332
<input checked="" type="checkbox"/>	McIntosh	Andrew	1	RSVP	Free Order Order 62065570793-964061910
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<input type="checkbox"/>	Norcross	Maggie	1	RSVP	Free Order Order 62065570793-968927808
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<input type="checkbox"/>	Sawchyn	Peter	1	RSVP	Free Order Order 62065570793-955803128
<input type="checkbox"/>	Sheridan	Angie	1	RSVP	Free Order Order 62065570793-959166370
<input checked="" type="checkbox"/>	Vaughan	Lan	1	RSVP	Free Order Order 62065570793-961570965
<input type="checkbox"/>	wilder	marilyn	1	RSVP	Free Order Order 62065570793-963011171
<input type="checkbox"/>	Wilder	Marilyn	1	RSVP	Free Order Order 62065570793-955245350
<input type="checkbox"/>	wilkerson	mary	1	RSVP	Free Order Order 62065570793-969624511
<input type="checkbox"/>	wilkerson	mary	1	RSVP	Free Order Order 62065570793-969624511

# INDIAN ROCK BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC VISIONING WORKSHOP

October 1, 2019 5:00 p.m.

NAME	AFFILIATION	E-MAIL ADDRESS
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Anne Todia	Resident	atodia@tampabay.rr.com
Rebecca Palm	Business Owner	RJ51001@verizon.net
Julie Hoofnagle	Resident + Action2000	Julie.hoofnagle@me.com
CARL LITZ	RESIDENT	CARLITZ39@TAMCO.COM
John Branstad	"	
Georgann + Dave O'Leary	resident	dngoleary@verizon.net
Jack Mc Aleer	resident	JTMA51@aol.com
Daryl Frahy	"	dfrahy@tampabay.rr.com
JUDE BOND	resident	

# INDIAN ROCK BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC VISIONING WORKSHOP

October 1, 2019 5:00 p.m.

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Phil Wrobel	Resident	
MAT LODEN	CRABBY BILLS	MAT@CRABBYBILLS.COM
Jo Nocera	Resident	
R.B. Johnson	Resident	

# INDIAN ROCK BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC VISIONING WORKSHOP

October 1, 2019 5:00 p.m.

NAME	AFFILIATION	E-MAIL ADDRESS
Joe DeBow		JOE.DEBOW@TICLOUD.COM
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Patti Sullivan		pjsully51@aol.com
Diane FLAHERTY		flahertyd@yaho.com
Cookie Kennedy		ckennedy@irbcity.com
Becky Ashby	Resident - A2K	
John Ashby	Resident - A2K	
Pete Sawchyn	IRB resident	
Mia Stierheim	IRB Resident - A2K	mia@sw-retail.com
EARL WESSON	RESIDENT - A2K	EWESSON@TAMPABAY.FL.GOV
DWIGHT HOLMES	RESIDENT	holmesmr2@gmail.com
MARY ROSE HOLMES	"	"

# INDIAN ROCK BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC VISIONING WORKSHOP

October 1, 2019 5:00 p.m.

NAME	AFFILIATION	E-MAIL ADDRESS
Kelly Cisanik	Resident	kcisanik@AOL.com
HOBAN BURTON	RESIDENT	HOBAN@HOBAN.COM
Jacquelyn Hernandez	Resident	irbislandgirl@yahoo.com
Kc Neumark	resident	kcneumark@tampabay-rr.com
PAUL JENKINS	BUSINESS OPERATOR	PAULY@CRABBYBILLS.COM
Cris & Todd Plumlee	Resident/Business	cris@plumleerproperties.com
NATALIE LIVERA	IRB RESIDENT	
LORI BOLAN	resident	lzyberch1@yahoo.com

# INDIAN ROCK BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC VISIONING WORKSHOP

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October 1, 2019 5:00 p.m.

NAME	AFFILIATION	E-MAIL ADDRESS
MICHAEL W. DAVIS	AZK	mwdavisco@earthlink.net
ERIC MEYER	AZK	

# Indian Rocks Beach Gulf Boulevard Visioning Workshop

Tuesday, October 1, 2019 from 5:00 PM to 7:00 PM (EDT)  
 Indian Rocks Beach City Hall - 1507 Bay Palm Boulevard - Auditorium - Indian Rocks Beach, FL 33785

	Last Name	First Name	Qty	Ticket Type	Payment Status
<input type="checkbox"/>	Ashby	John	2	RSVP	Free Order Order 62055712306-1073657015
<input type="checkbox"/>	<del>Bond</del>	Jude	1	RSVP	Free Order Order 62055712306-1071150333
<input checked="" type="checkbox"/>	<del>Box</del>	Marie	2	RSVP	Free Order Order 62055712306-1070774497
<input type="checkbox"/>	Dausas	Adrienne	1	RSVP	Free Order Order 62055712306-1070975991
<input type="checkbox"/>	Davis	Michael	1	RSVP	Free Order Order 62055712306-1071008649
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<input type="checkbox"/>	Holmes	Mary Rose	1	RSVP	Free Order Order 62055712306-1071080483
<input type="checkbox"/>	Holmes	Scott	1	RSVP	Free Order Order 62055712306-1075954563
<input type="checkbox"/>	Hoofnagle	Julie	1	RSVP	Free Order Order 62055712306-1071000449
<input type="checkbox"/>	Miller	Delano	1	RSVP	Free Order Order 62055712306-1079492659
<input type="checkbox"/>	Nocera	Jo	1	RSVP	Free Order Order 62055712306-1079306935
<input checked="" type="checkbox"/>	Pergolizzi	Robert	1	RSVP	Free Order Order 62055712306-1070993519
<input type="checkbox"/>	Pfanstiehl	John	2	RSVP	Free Order Order 62055712306-1071028257
<input type="checkbox"/>	Sawchyn	Peter	1	RSVP	Free Order Order 62055712306-1071077791
<input type="checkbox"/>	Stierheim	Mia	2	RSVP	Free Order Order 62055712306-1071089183

# INDIAN ROCKS BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC WORKSHOP



NOVEMBER 19, 2019 5:00 P.M.

NAME	AFFILIATION / ORGANIZATION	E-MAIL ADDRESS
Nan Jensen	A2K - Resident	nanjensen 51@gmail.com
Phil Hanna	City Commissioner/Resident	<del>phanna</del> phanna1@tempabay.vr.com
John Franston	Resident	public1@iw.net
Diane Flagg	Commissioner	<del>dsunnenyaka</del>
Jim Beggins	Developer	jim.beggins@c21BE.com
Nick Palomby	Vice Mayor	
Julie Hoofnagle	IRB Action 2000	Julie.hoofnagle@me.com
Joe L. Coppen	Resident	FLSandbech@yahoo.com
Kelly Cisarik	Resident	KCisarik@AOL.com
Lee Wilkerson	Business owner/Resident	gulfsid810@gmail.com
Scott Holmes	Resident	scottholmes-architects.com

# INDIAN ROCKS BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC WORKSHOP



NOVEMBER 19, 2019 5:00 P.M.

NAME	AFFILIATION / ORGANIZATION	E-MAIL ADDRESS
Helen Curley	Home owner	KURLEY@AOL.COM
Beth Flynn	Homeowner	ebf1@aol.com
Joe DeBow	"	
Rich Welch	Home owner	richwelch2@gmail.com
Kathy Gerson	Home owner	kathy.gerson@yahoo.com
Robert Pergolizzi	Home owner	pergo2@brighthouse.com
HUGH BURTON	"	HUBURTON@HUBURTON.COM
Alice Kourchenko	"	kourchaga@hotmail.com
Cookie Kennedy	Mayor	ckennedy@irb.city.com
DIANE DANIEL	SEASONAL RESIDENT	diane@bydianedaniel.com
Ed Hoofnagle	Home owner	
Mary Jo	Homeowner	miocchino@TAMPABAY.FL.COM
Myrtle Long-Hall	Home owner	sandyshoresirb@yahoo.com

# INDIAN ROCKS BEACH GROWTH & REDEVELOPMENT VISIONING STUDY – PUBLIC WORKSHOP



NOVEMBER 19, 2019 5:00 P.M.

NAME	AFFILIATION / ORGANIZATION	E-MAIL ADDRESS
Adrienne Dausers		adriennedausers@c2ibe.com
FRANK HARTZELL		
BERT VALERY		
Peter Sawchyn		
ROZ SACCA		
TRICIA PUEBLO		
R.B. Johnson		
GARY CLARKE		
NATHAN LIVERA		

<b>Indian Rocks Beach Gulf Boulevard Visioning Study</b>	
<b>October 1, 2019 Workshop Interactive Feedback Session Findings</b>	
<b>Question</b>	<b>Average</b>
<b>Please rank each option on a scale of 1 to 5, 1 meaning you are strongly against this option and 5 meaning you strongly support this option. You will have 15 minutes.</b>	
<b>a. Architectural treatments for new development (creating architectural standards for new development)</b>	3.75
<b>b. Development that makes accommodations for sidewalk cafes (ensuring that when development is approved, it includes expanded sidewalks for café uses and public spaces)</b>	4.23
<b>c. Offer limited financial incentives for the desired uses (i.e., grocery store) (City offers limited incentives to developers for them to locate certain uses in IRB)</b>	2.39
<b>d. Partner to offset certain development costs (City subsidizes part of a development project to reduce costs to the developer)</b>	1.72
<b>e. Jointly develop a site plan (City works with developer on a site plan to design a project to meet the needs of both parties)</b>	3.63
<b>f. Develop flexible parking standards (make on-site parking requirements less stringent to allow for more flexibility in development)</b>	2.65
<b>g. Streamline site plan approval process (improve the efficiency of the site plan process to get projects approved more quickly)</b>	3.67
<b>h. Development incentives such as reimbursement of impact fees, mobility fees, etc. (City offers incentives to developers to promote development to locate in IRB)</b>	1.88
<b>i. Aggressively market select properties to developers on behalf of owner(s) (City markets certain properties where development is desired on behalf of property owners)</b>	2.11

<b>Indian Rocks Beach Gulf Boulevard Visioning Study</b>	
<b>October 1, 2019 Workshop Interactive Feedback Session Findings</b>	
<b>Question</b>	<b>Average</b>
<b>Please rank each option on a scale of 1 to 5, 1 meaning you are strongly against this option and 5 meaning you strongly support this option. You will have 15 minutes.</b>	
<b>j. Provide off-site public infrastructure (i.e., utilities, transit shelter, bike racks, public art, etc.) (City allows developers to provide off-site public infrastructure in return for potential concessions on development standards)</b>	3.03
<b>k. Approve specific code variances and/or waivers to development standards (City allows developers to have specific code variances and/or waivers to development standards in return for any concessions made for City requests related to project design and/or construction)</b>	2.39
<b>What type of funding strategies should be explored to address parking challenges?</b>	
<b>a. Metered parking within the business district</b>	3.16
<b>b. Public/private partnership with business owners</b>	2.93
<b>c. Explore tax/millage rate options</b>	1.30
<b>d. Explore bonding or loans</b>	1.72

## City of Indian Rocks Beach

### Gulf Boulevard Visioning Study

#### Summary of Significant Comments – August 2020

- Further exploration of mixed-use considerations in the Business District Triangle overlay, particularly in regard to mixed-use with residential- with a focus on long-term residents
- Research on potential incorporation of a unified theme for public art within the community
- Further explore business grant opportunities for small businesses
- p 56- Bottom paragraph talks about the City floodproofing underground utilities to ensure they don't get damaged- I don't think this is the City's job it is the utilities job.
- p 57- first paragraph refers to dry floodproofing and wet floodproofing-These methods are used if needed for new buildings, they were used it on 321 Gulf Blvd, it is really up to the owner/architect/ builder to decide what method they want to use.

- You may already realize this but your team is caught between two different visions for IRB:
  - A. Our IRB commission wants growth and development. A majority have backgrounds in Real Estate and development. Unfortunately, their personal goals are out of step with the majority of the populace. In 2017 they passed an ordinance allowing them to apply PUDs to even the smallest lots and in all districts except single family. They have already used this PUD ordinance to bypass current zoning to give developers increased building heights, parking concessions and setback concessions.
  - B. The vast majority of residents want preservation and protection. They chose to make their home in IRB because of its low-rise look and uncrowded, non-touristy nature. If you asked the simple question "Do you want more growth and development in IRB?" the majority of the residents answer NO!

More growth and development creates even more traffic and more crowding which is already a major negative impact on residents. While some rental property investors, developers and businesses want more people, more commerce and more tourists, they are a small minority. Most residents do not want this.

I hope your team can keep the residents' passionate desire for limiting future growth, especially commercial businesses and vacation rentals so that Indian Rocks Beach does not devolve into yet another overdeveloped tourist beach town.

- As I discussed with some of you, I have an issue with the methodology that Forward Pinellas used in determining the "market area" for their study. That concern is focused on using the city boundaries alone to determine supply and demand for consumer goods. There is not a grocery store within the city limits, thus the entire population is shown as requiring a grocery store. However, if we factor in the Publix and Walmart Neighborhood Market, both located just minutes from IRB, that demand changes. I have attempted to design a "Market Area", see the Site Map, that includes the stores but not the additional population that would be included in a traditional drive time analysis or by designing a market area which encompasses both stores and the surrounding population. The Retail Marketplace Profile, as related to the attached Site Map, significantly reduces the demand for

groceries, I would guess that even the reduced Demand Estimate in the attached Retail Marketplace Profile is overstated. I cannot fathom a grocer considering locating in this city given the strong competition, small market and the high cost of actually developing a grocery store in IRB. I could provide a detailed cost analysis but will refrain from doing so as it is not necessary.

What I did not do in retrospect was take into account the Walgreen's and CVS located at the same intersection which would have an additional impact on demand.

I do think that some of the attached info is very informative maybe in addressing areas of Demand.

Forward Pinellas has acknowledged that the study they are completing has some major shortcomings and I would appreciate your sharing this with them

Thank you.

- Concerned about the feasibility of some of the economic vitality recommendations with the current pandemic- some of the restaurants are closed, including Crabby Bills
- Some of the recommendations are conflicting, for example: the recommendation of grocery store in the Narrows is conflicting with reducing traffic congestion
- Also, would like us to add some pros and cons to the recommendations we are proposing, to show the whole picture. For example, when proposing mixed-use development, acknowledge the potential impacts on traffic and congestion, if none of the traffic and congestion reduction recommendations are implemented. The group would like us to add acknowledgements to recommendations to show the relationship between the themes because it seems like they are siloed.
- Felt there was a heavy emphasis on an increase in density - which conflicts with traffic congestion
- Clarification of items such as the intent of the case study example for Dunedin (i.e., it is an example of a creative financial structure that the City could consider, not for just a grocery store, but for any type of retail/mixed-use development). The comparison with Dunedin is not an apple to apple comparison and we should have less emphasis on adding a grocery store in the Dunedin case study example, and more of a focus on the creative financial structure that was used to fund the Natures' Food Patch project. They would also like us to find out how the Nature's Food Patch is doing.
- Doesn't seem to think the community wants a grocery store. If we propose a gourmet grocery store- acknowledge the disadvantages of it, such as higher cost items, etc.
- Said they think it would be feasible to review the Land Development Code right now, and incorporate changes
- Consider a recommendation related to the development of a historic preservation plan, or the creation of a historic preservation coordinator position within the City. HOA and Action 2000 resources could help develop the plan and could be a near term item.
- Potential historic preservation position to be included in the planning and zoning department – need to find out what the position entails
- Recommendations weak – really suggestions with "options for consideration"; "could likely support" – needs more actionable, proven plans
- Recommendations contradictory, i.e. suggest a grocery in the Narrows yet the transportation section mentions an existing traffic issue in the same area

- Short term rental impact must be included to have a complete and clear picture, particularly as it relates to the Retail Market Study
- Concerns that retail market data on grocery market may not be accurate
- Good example of mixed conceptual design for Crabby's (note: parking on side streets may not be feasible, change in setback with increased height in the Narrows may create a "concrete canyon" effect)
- Community most likely not in favor of National Historical Preservation regulations but recommend a designated Landmark Preservation Board to educate and encourage preservation and create landmark designated properties/areas; need specific guidance on Landmark Commission creation, review submission & process, roles & responsibilities
- E-Scooters are most likely not feasible in IRB with narrow, 3" or less\* bike lanes. Note: Initial accident and abandonment data from Tampa pilot is not positive
- Mixed use demand and feasibility needs more detail and clarification to include specific types of commercial businesses
- Regarding historic preservation, keep some documentation as to what the process for creating a historic district entails, and then identify when it may not be a feasible option for Indian Rocks Beach.
- No desire for a larger scale circulator service in Indian Rocks Beach. Reach out to St. Pete Beach to learn more about their circulator service and include it for informational purposes only.
- Check sidewalk map to see if there are gaps in the commercial areas
- So pleased to see that the word preservation has come up in this study because I know for so many of the citizens that's a major concern of theirs and I'm hoping that in the future there'll be a study about the different ways that we can help preserve the small town feel of IRB, such as establishing historic zones, purchasing development rights, encouraging extensive remodeling of single-story and two-story homes, and significantly increasing the impact fees or providing property tax breaks.
- Consider adapting the parking study that was conducted 10 years ago
- There is a lot of confusion over where to ride bikes and scooters and walk along Gulf Blvd
- Interested in levying some sort of tax for short-term rentals
- When considering revisions to the land development code, what can we do to encourage redevelopment without encouraging congestion and an increase in the number of cars in the City? Consider elements to encourage alternative modes, such as biking and walking.
- E-Scooters could be very dangerous in IRB, don't want the City affiliated with an e-scooter program.
- Idea of a historic preservation board needs to be balanced with real life implications of redevelopment and property rights. Support preservation component but should be done voluntarily not involuntarily.
- Market study inaccurately measures the market share potential and it was unrealistic to use the municipal boundary. Also, do not think that the type of grocery store that was mentioned in the retail study was realistic.
- Encourage parking to locate off of Gulf Blvd.

- Not supportive of mixed-use development if it encourages additional short-term rental uses, with the exception to being located in a commercial district and not in residential neighborhoods
- Resounding response from all participants was the desire to preserve and protect small town values while facing population growth, increased rental properties, and overcrowding of streets. The City is not interested in growth and development, nothing could be further from the truth.
- Supportive of creating a summary table of zoning districts in the land development code
- Recommends architectural guideline changes for future residential and commercial projects to keep in line with the City's small-town character. Defers to City Manager and Planner for guidance on how to update the land development code.
- Need to continue to work to make Gulf Blvd safer, and have already been incorporating elements to do so, such as incorporating crossing medians, and incorporate signage so travelers will recognize that the City is a "Bicycle Friendly City". Also interested in encouraging the educational component to raise awareness of safety laws.
- It makes sense that our growth opportunities are going to be in our business district with the exception of the parcel at 23<sup>rd</sup> and 24<sup>th</sup>. Consider revisions to the Business District Triangle overlay zone. Incorporation of a grocery store in the Triangle could make sense because people could bike or walk there and potentially dine in.
- City should meet with downtown business partners to see what planning they think would enhance their businesses and what would encourage new businesses in that area, and ways to manage the downtown parking.
- Need to highlight our museum and park as amenities. Does not think the City should pursue a historic preservation committee. Perhaps A2K and the museum could consider looking at incentives in tandem with what the cottage property owners want but would need to be something they feel comfortable with going forward.
- Would like to pursue branding as a bicycle and pedestrian-friendly city
- Could perhaps look into a private operator for a circulator service or consider increasing the number of trolley stops during peak times.
- Encourage the City to review their Stormwater Master Plan
- Not interested in purchasing additional land for greenspace because that will put additional demand on taxpayers and the City already has sufficient greenspace.
- Would like to consider continuing streetscaping projects with A2K
- Would like to see some additional discussion on what we can do to support the small businesses within the City and explore anything we can do to streamline the business start up process, to make it easier for them to get up and running.
- Doesn't know if historic preservation is a city operation but would like to do anything the City can do support the quaintness of IRB.
- Everyone loves IRB's small-town character, and we don't want to see that change, however we can enhance it through architectural guidelines, but need to look into whether they can be legally enforced.

- Business Triangle makes sense to encourage new development to create a destination and would like to see more of what we can do down there.
- Concern with circulator program regarding the liability of the City.
- All for preservation of the City- perhaps incorporate elements such as signage and placemaking elements.
- Would like to see additional sidewalks in the Triangle put in for safety, and would like to continue working with Safe Streets Pinellas
- Interested in creating some sort of a round table with local businesses to see how we can support them
- Would like to resurrect the parking study to see how it can be updated
- Believes in mixed-use in the commercial areas. We should promote more owner occupied mixed-use vs. vacation rentals.
- Interested in encouraging architectural guidelines all the way through Gulf Blvd.
- Does think there is something that can be done with the virtual walking tour in terms of preservation.
- There aren't many people that are interested in a preservation ordinance. Interested in approaching the A2K group and ask them to look more specifically on what the historic preservation options are, in particular incentives, what kind of incentives exist and then report back to the Commission.
- There was a parking study that was conducted in 2010, but the recommendations that came out of it were somewhat vague.