

PRELIMINARY FEASIBILITY REPORT

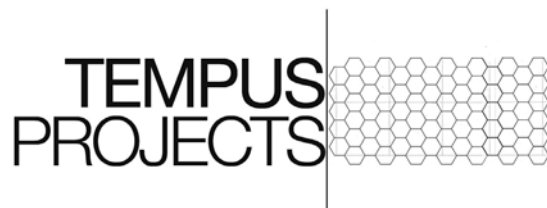
Tampa, Florida | October 2020



Top Left Photo:

Top Right Photo: Arts4All dancer Liu Yan // Photo Credit: Elizabeth Engasser

Bottom Photo: Tampa Museum of Art // Photo courtesy of the Tampa Museum of Art, sponsored in part by the Community Foundation of Tampa Bay



ACKNOWLEDGMENTS

This study is made possible by generous funding from multiple members of the Tampa Steering Committee. Artspace heartily thanks the committee for its support, and we are especially grateful to Artspace Board Member, Peter Lefferts, for his leadership. The Steering Committee that he assembled offered us warm hospitality and invaluable insight throughout our virtual visit. It is a pleasure to work with such a committed group of individuals.

For a list of Steering Committee and Core Group members, see the next page of this report.

We also thank Tracy Midulla, the Executive Director of Tempus Projects, Artspace's partner in identifying creative individuals to participate in the artists/creative focus group as well as the public meeting. Tracy was Artspace's eyes and ears to the creative community and also coordinated a video tour of four neighborhoods identified by Tampa artists as the neighborhoods of focus for a future potential mixed-use artist housing project.

Debbi Shaffer was another leader we would like to recognize for her extraordinary multi-faceted administrative skills in organizing meeting participation, taking notes at the focus groups and public meeting and being our technology trouble-shooter for the many virtual interactions.

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Gobioff Foundation

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Linda Saul Sena

Robert Miles

Eileen Goldenberg

Strategic Property Partners

Cynthia Rogers

Mighty Fine Design



AMERICA'S LEADER IN ARTIST-LED COMMUNITY TRANSFORMATION

Artspace is a nonprofit organization that uses the tools of real estate development to create affordable, appropriate places where artists can live and work. Because Artspace owns and operates the projects it develops, it can ensure that they remain affordable and accessible to artists in perpetuity. Over the last three decades, Artspace has led an accelerating national movement of artist-centric community transformation. While embracing the value the arts bring to individual lives, Artspace has championed the once-radical idea that artists living on the edge of poverty and chronically underfunded arts organizations can leverage fundamental social change. With headquarters in Minneapolis and offices in New York and Washington D.C., Artspace is America's leading developer of arts facilities and has served as a consultant to hundreds of communities and arts and culture organizations nationwide.

WWW.ARTSPACE.ORG

Founding Steering Committee Members

Brad Cooke, award-winning architect and real estate developer working on multiple projects in the Tampa Bay area

Neil Gobioff, playwright and producer and president of the Gobioff Foundation with its focus on the arts in Tampa

Andrea Graham, theater and performing arts supporter and aficionado, instrumental in the founding of Stageworks Theatre and the Straz Performing Arts Center

Peter Lefferts, Co-Chair, former executive of Citicorp and American Express, serving on many boards focused on economic development and affordable housing

Tracy Midulla, acclaimed studio artist, studio arts professor at Hillsborough Community College, and Executive Director of Tempus Projects, Inc.

Bob Miles, Co-Chair, internationally acclaimed keynote presenter and author

Ned Pope, technology and innovation leader, former nonprofit executive, singer/songwriter, member of Wave Theory artist collective

Debbi Shaffer, award-winning executive assistant with significant experience with corporate executives

Cynthia Rogers, data savvy, creative strategic marketing and operating leader with a focus on growth and digital transformation

Ron Weaver, advisor extraordinaire to landowners, developers, and local governments in environmental, land-use, and property rights law and real estate acquisition and financing

FOUNDING CORE GROUP

Tonja Brickhouse, Retired United States Air Force Colonel, Former City of Tampa Department Director

Emily Ghosh, Visual Artist / Painter

Eileen Goldenberg, Visual Artist / Painter / Illustrator

Sheree Greer, Literary Arts / Kitchen Table (nonprofit)

Alex Harris, Musician / Conservatory for the Arts for Teens

Margaret Miller, Art Administrator / USF Contemporary Art Museum / Graphic studio

Robin Nigh, Manager of Arts & Cultural Affairs, City of Tampa

Edgar Sanchez Cumbas, Visual Artist / Painter / Printmaker

Emiliano Settecasei, Visual Artist / Mixed media / Quaid Gallery

Alex Sink, Former Chief Financial Officer for the State of Florida

Selina Roman, Visual Artist / Photographer

Focus Group Participants

Artists and Creatives Focus Group Participants

Christina Acosta	David Jenkins	Junior Polo
Janine Awai	Tony Krol	Libbi Ponce
Dennis 'Amadeus' Lemmerman	Kalup Linzy	Jessica Raquel
Kendra Frorup	Lynn Manos	Kale Roberts
Emily Ghosh	Noelle Mason	Selina Roman
Eileen Goldenberg	Mike Mass	Edgar Sanchez Cumbas
Andrea Graham	Margaret Miller	Erika Schneider
Sheree Greer	Andresia Moseley	Emiliano Settecasì
Crystal Haralambou	Eric Ondina	Ann-Eliza Taylor
Alex Harris	Cam Parker	Michael Tomor
Sarah Howard	Nicalyn Perez	Susana Weymouth

Civic Leaders Focus Group Participants

Tonja Brickhouse, Economic Club of Tampa, Treasurer

Joe Citro, City of Tampa, Councilman

Dr. Ginger Clark, Hillsborough Community College, Ybor City Campus, President

Martine Collier, Arts Council of Hillsborough County, Executive Director

Ernest Coney, CDC of Tampa, President & CEO

Maryann Ferenc, Tampa Bay Chamber, Board Chair

Cheryl Howell, Hillsborough County, Affordable Housing Services, Director

Yvette Lewis, NAACP Hillsborough County, Branch President

Leroy Moore, Tampa Housing Authority, Senior Vice-President & COO

Chantal Ruilova Hevia, Ybor City Museum Society, President & CEO

Linda Saul-Sena, Community Advocate

Mariella Smith, Hillsborough County, Commissioner

Sam Sodos, Sycamore PR, Founder & CEO

Aislinn Stone, Hillsborough County, Economic Development Dpt. Cultural Affairs Officer

Lorna Taylor, Tampa Bay Businesses for Culture and the Arts, Board Member

Ian Whitney, City of Tampa, Government Affairs, Assistant Director

Greg Yadley, Shumaker, Loop & Kendrick, Attorney / Partner

Funders and Finance Focus Group Participants

Christina Barker, Vinik Family Office, Community Partnership and Policy, V.P.

Liz Dimmitt, Dimmitt Chevrolet, Managing Partner

Jerry Divers, Bank of Tampa, Chairman Emeritus

Molly James, Metropolitan Ministries, Advancement & Community Engagement, Sr. V.P.

Moez Limayem, University of South Florida, College of Business, Dean

Vanessa McCleary, City of Tampa, Housing and Community Development, Manager

Sandy Murman, Hillsborough County, Commissioner

Craig Richard, Tampa Bay CDC, President & CEO

Sandy Rief, Allen Dell Attorneys at Law, Attorney / Shareholder

Rob Rosner, City of Tampa, CRA Manager & TCC Capital

Sara & David Scher, Real Estate Development

Yvette Segura, USAA, Regional V.P.

Ann Shaler, Bank of America, Senior V.P.

Darryl Shaw, Tampa Bay Economic Development Council

Alex Sink, Former Chief Financial Officer for the State of Florida



The Jobsite Ensemble, wearing costumes from characters past, gathered to celebrate the company's 10th birthday // Photo courtesy Crawford Long, Sponsored in part by the Community Foundation of Tampa Bay



Noisy Womxn Drum Collective at Tempus Projects

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New Roots Collective working at LiveWork Studios



Musician Ari Chi
Photo Credit: @itsarichi Instagram

PRELIMINARY FEASIBILITY STUDY: OVERVIEW

Successful projects are the result of good planning that engages robust leadership and support from community leaders. For an Artspace project, planning begins with a Preliminary Feasibility Study, the first step in the process of determining how an affordable arts development project can move forward in the context of a community's unique needs, assets, and resources.

Central to the study is the Preliminary Feasibility Visit, in which an Artspace team typically travels to the community to gather information, connect with stakeholders, and share information about the development process. Over the course of two or three days, working closely with a core group of local leaders, the team tours existing arts facilities, looks at potential buildings and sites, holds a public town hall meeting, and conducts focus group sessions with civic leaders, creatives, and others. Since March of 2020, Artspace has developed a virtual approach to these meetings. The advantage of the virtual environment, has been the ability to spread the contact over multiple months. The disadvantage has been obvious – all 2-dimensional contact rather than the preferred 3-dimensional, person-to-person contact.

Sample quotes from focus group and public meeting participants:

- “Exciting discussion. I look forward to seeing this evolve.”
- “Looking forward to making this a reality.”
- “Very excited to see where this goes.”
- “Thanks so much for including me.”
- “Having a strong arts community makes a city so much more desirable to businesses and people choosing to move to that community.”
- “The arts are a bridge to a diverse world.”

The Artspace Approach

What information does Artspace look for? Over three decades and more than 50 projects, Artspace has identified six components that are essential to successful development of an arts project. While these are not the only factors Artspace considers before making a recommendation to move a project forward, they help frame the discussion, provide a sturdy framework for assessing the feasibility of a proposed project, and help community leaders plan for successful, sustainable, and long-term affordable, mixed-use facilities. They are:

ALIGNMENT WITH COMMUNITY GOALS. Good projects are more than the sum of their parts. A potential project can help achieve other civic goals, such as economic development, urban infill, racial and economic equity, or historic preservation. Artspace considers strategies and partnerships that can leverage impact. During our visit, we ask community members to identify their top priorities.

LOCAL LEADERSHIP. Are there leaders on the ground who are willing and able to advocate for the project, open doors, and keep lines of communication flowing between developer and community? Leaders can come from all sectors, from elected officials to business leaders to artists to ordinary citizens who are passionate about making their community a better place to live, work, and create.

POTENTIAL NEIGHBORHOODS. At this early stage, our goal is not to select a site but to identify neighborhoods and possible candidates for further study. The factors we consider include artists' preferences, location, cost, size, ease of acquisition, and potential for sustained positive impact. As a project moves forward, specific candidate sites will be evaluated in depth and in the context of a refined project concept, Arts Market Study data, and a deeper understanding of local development priorities and funding sources.

PRELIMINARY FEASIBILITY VISIT

Over the course of several months, primarily August and September 2020, the Artspace Consulting team:

- Facilitated focus group meetings with:
 - Artists and Creatives
 - Finance and Funding Leaders
 - Civic and Community Leaders
- Conducted select one-on-one follow-up meetings
- Held a virtual public meeting with more than 95 attendees
- Virtually toured three neighborhoods
- Met multiple times with members of the Steering Committee

FUNDING AND FINANCING. Arts facilities typically represent significant investments of public and private resources. Although a variety of state and federal programs can be used to generate revenue for construction, Artspace relies on local funding and financing programs to support predevelopment expenses and gap funding. The Preliminary Feasibility Study considers the community's interest and capacity to commit resources to an arts facility.

ARTS MARKET. Is there a sufficient market to support an arts facility? To find out, we collect qualitative data through focus group meetings. We ask artists if they need space to live, work, create, teach, share, and/or sell their art, the types of uses the spaces need to support, where space might be located and what they consider an affordable rent. Later, if a decision is made to move forward, we conduct a wide-reaching, formal Arts Market Study to test the findings and the market more deeply.

PROJECT CONCEPT. How will the space be used? Although many communities have a concept in mind before inviting Artspace to the table, during a Preliminary Feasibility Visit we take nothing for granted and try to look at the situation objectively. One of the first things we ask stakeholders is: "What kinds of creative spaces does your community need and want?" The project concept generally emerges from the answer to that question and the findings from each of the areas of focus discussed above.



*Artspace staff and board pose with ceremonial artist shovels at the Northside Artspace Lofts Groundbreaking
Photo Credit: Jahliah Holloman*

Investing in Creativity

This report is informed not only by Artspace's experience as a developer and operator of affordable facilities for artists and arts organizations but also by many independent studies of the social, economic, cultural, and other community benefits of Artspace projects. Mixed-use arts facilities with long-term affordability have been shown to:

- **Generate economic revitalization and development.** Every project provides job opportunities before, during, and after construction.
- **Increase arts/cultural activity and community engagement** in diverse and emerging neighborhoods without contributing to gentrification.
- **Preserve old buildings, stabilize neighborhoods, and revitalize vacant and underutilized properties.** They also help preserve cultural heritage by providing spaces where cultural art forms can be passed from one generation to the next.
- **Catalyze private and public investment,** such as façade improvements and general beautification, in the surrounding area.
- **Create community spaces** that give the public opportunities to interact with artists and provide opportunities for other local artists to showcase their work.
- **Support independent artists,** who generate economic activity by drawing visitors and holding events, selling products or services, purchasing equipment and supplies, and paying taxes. Every independent artist is in effect the owner-operator of a small business.
- **Build community.** Artists and creatives are active neighbors and community members. Many collaborate with the educational, cultural, and business communities as teachers, community conveners, and volunteers.

COMMUNITY PROFILE

Introduction

Tampa is a booming “big league” city often perceived as second fiddle in the arts to its smaller neighbors – St. Petersburg to the west and Sarasota to the south. That perception of being less “artsy” or “arts-friendly” and more focused on business, transportation/distribution, health services, universities, sports and the military is far from the truth, as seen in Artspace’s recent work in the community.

Sports and the military play a major role in the economy of Tampa. MacDill Air Force Base employs more than 14,000 active military and civilians. Major and minor league sports activities, including spring training, often get more “air time” than the arts.

Aside from sports and the military, the economy of Tampa is strong and diverse. The city plays a regional role as an employment center with banking, healthcare, and Publix markets among the top employers. It is also artistically rich with the Straz Performing Arts Center, the Tampa Museum of Art, Stageworks Theatre, the University of South Florida’s School of Art and Art History, University of Tampa, Hillsborough Community College’s visual and performing arts, culinary and theater programs along with numerous other small and large cultural institutions including Artspace’s partner organizer for this study, Tempus Projects, a nonprofit dedicated to nurturing established as well as emerging local, national and international artists. Tampa is not widely regarded as a strong arts community. However,

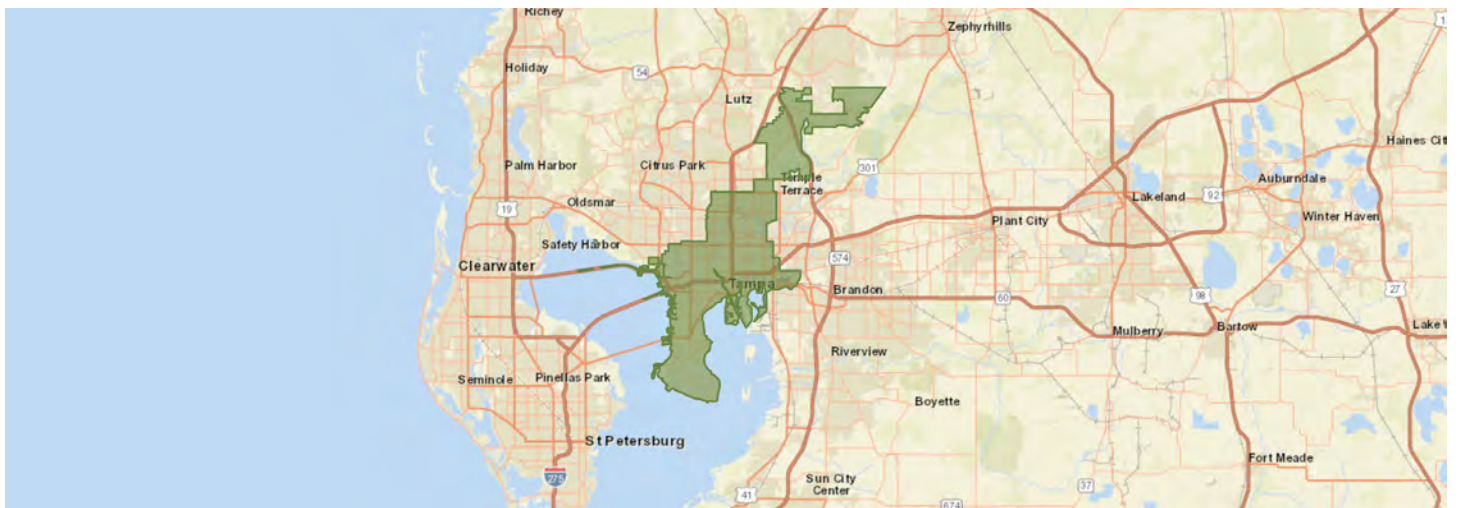
Because affordable housing projects rely in part on government funding, the pandemic’s shrinking of state and local budgets could have a significant effect, at least in the near future. For example, in the state budget signed by Gov. Ron DeSantis in October 2020, he vetoed \$225 million in affordable housing funds, in effect holding them for the legislature’s later directed use to help offset plummeting sales tax revenue rather than distributing them to local governments through the SHIP program as planned.

Source: TampaBay.com

Artspace Consulting found many outward appearances to the contrary. It shows as a community that leads with arts and culture as a way of making itself a distinct and desirable place to live, work and play.

Tampa also has the distinction of being the Hillsborough County seat and the third largest city in Florida. In the last decade, several neighborhoods and areas of the city, including downtown, the Channel District and Ybor City have become increasingly expensive, starting a cycle of displacement of creative people and entrepreneurial businesses that was popularized in NYC as the “Soho Effect.”

Scarcity of affordable space has risen as an obstacle to keeping and retaining artists, creatives, and solopreneurs. With that, the timing of the Artspace Preliminary Feasibility Study is as important as ever to help identify concrete ways of creating affordable (well below market rate) spaces for Tampa’s creative sector. It is within this context that Artspace began its work in September 2020.



Location of Tampa, FL



The Florida Museum of Photographic Arts
 Photo Credit: Keir Magoulas, Visit Tampa Bay
 Sponsored in part by the Community Foundation of Tampa Bay



Henry B. Plant Museum
 Photo Credit: Gabriel Burgos, Tampa Magazine

TAMPA, FL AT A GLANCE

- Population (2020 est.): **390,996**
- Households (2020 est.): **158,998**
- Population, % change 2010-2020: **+16.5%**
- Est. population growth 2020-2025: **+8.1%**
- Vacant housing units, 2017: **11.7%**
- Median age (2020 est.): **36**
- Median household income (2020 est.): **\$53,856**
- Renter-occupied households (2020 est.): **54.7%**
- Median gross rent, 2016: **\$1,202**
- Population paying over 35% of income on gross rent: **41.4%**
- Veteran population: **7.3%**
- Race and ethnicity (2020 est.) (top 5):
 - White: 60.5%
 - Hispanic/Latino (of any race): 27.7%
 - Black/African American: 26%
 - Asian: 4.6%
 - Some other race: 4.4%

Source: ESRI Business Analyst, US Census, 2019

The Great Recession, which officially began December 2007 and ended June 2009, hit Florida particularly hard. The effects lingered, too. At the end of December 2009, 75% of Florida metros saw double digit unemployment rates (seasonally adjusted). At its worst point, the Tampa metro area had nearly 153,000 people out of work and a total unemployment rate of 11.9 percent.

Fast forward to January 2016 though, and the economic picture in Tampa looked dramatically different. The Tampa MSA boasted a remarkable jobs recovery, with unemployment plummeting to 4.6 percent. According to the *New York Times*, the metro had expanded its employment by 24 percent since December 2009, and now ranks fourth in the U.S. and first in the state of Florida for the most growth.

Within the metro area, the City of Tampa is leading the charge when it comes to economic recovery. Ranked as the number one City in the Southeast by *Money* magazine, Tampa is undergoing a massive transformation of its downtown waterfront district courtesy of the \$3 billion redevelopment of 40 contiguous acres in the urban core. This development is led by Strategic Property Partners, a partnership between Jeff Vinik and Bill Gates' Cascade Investment.

Source: Tampa Bay CDC

FINDINGS

Alignment with Community Goals

It's a statement that bears repeating: Good projects are more than the sum of their parts. They address community goals, such as historical preservation, affordable housing, and neighborhood revitalization, that are not necessarily arts-related. Artspace's most successful projects are multifaceted. In New York City, for example, El Barrio's Artspace PS109 saved an iconic East Harlem public school threatened with demolition. It now provides 90 units of affordable housing for working artists and has replaced a vacant building with a new cultural destination in the Hispanic neighborhood known as El Barrio.

To help us determine the goals that matter most in a community, Artspace uses the Preliminary Feasibility Study to obtain input from a broad cross-section of stakeholders. Once we understand their priorities, we look for ways to bring them into alignment.

In Tampa, the Steering Committee had much to say about Tampa's diverse economy and rich history in the arts and about the multiple benefits of Tampa as a place to live and work. The University of South Florida, the University of Tampa, Hillsborough Community College, and other educational institutions drew praise for the "amazing opportunities" they have created for area residents, including in the arts.

But this group and focus group participants also noted that despite the community's efforts to make racial segregation and disparities a thing of the past, Tampa "is still a divided place" where "the larger, more formal artist spaces are still predominantly for white artists." One of the focus group participants from the University of South Florida and the Tampa Bay Partnership mentioned a recent study in which Tampa ranked 19 out of 21 cities in racial disparities. The participant went on to say that Ybor City has a long history of rich cultural diversity, but the disparities are enormous.

Artspace asked attendees of the Civic and Community Leadership and Funding/Financing focus groups and the Public Meeting (made up largely of artists and creatives) to complete a virtual poll at the end of each session. All participants chose up to three goals based on importance to the community. There were 10 options in each poll. It is worth noting that the option: "Addressing Racial and Economic Disparity" was added following the Funding and Financing focus group, in which one participant raised it as a critical concern above other options on the list. It appeared in the top three for all other polls, underscoring what we heard from so many during the course of our visit. This tells Artspace that a future project needs to address this issue head-on, starting with having plenty of diverse voices at the table.

The other goal that ranked among the top three for all groups was "Maintaining Affordability," which is core



*Tampa Musicians Bangarang
Photo Credit: @Bangarang Facebook*



The Beach by Snarkitecture Funded in part by The Vinik Family Foundation // Photo Credit: Libbi Ponce

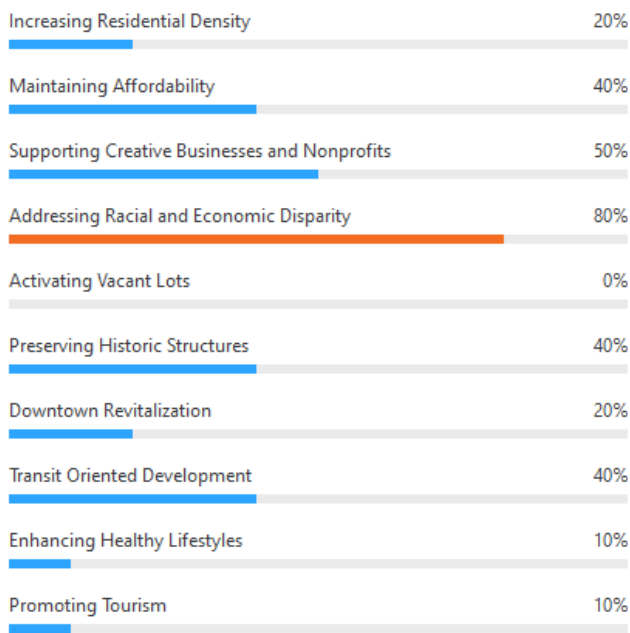
to the evolving project concept and clearly aligns with a broader community priority. This was followed by “Supporting Creative Businesses and Nonprofits” and “Transit-Oriented Development, TOD”, which was among the top three for two of the groups (Funding/ Financing and Civic/Community Leaders). Not surprisingly, “Supporting a Cultural Community” made it into the top three for the Public Meeting participants, most of whom came from the creative sector.

It’s worth noting that the focus on Transit-Oriented Development by many, seems to be driven by a lack of public transportation infrastructure. Tampa was described as transit-poor, a deficit that only deepens social and economic inequities. This issue was a factor in later discussions about potential neighborhoods for a future project. Siting a new facility within walking and biking distance to employment centers, namely downtown, and other critical amenities including basic needs shopping and services was raised as an important consideration when selecting a site for a mixed-use housing project.

Each of these identified priorities can align with a future project through the types of spaces created and selection of non-residential tenants, the long-term commitment to affordability, funder and investor participation, project location, meaningful and trusting partnerships, and the community development process itself. These priorities begin to form the values and the contract with the community moving forward.

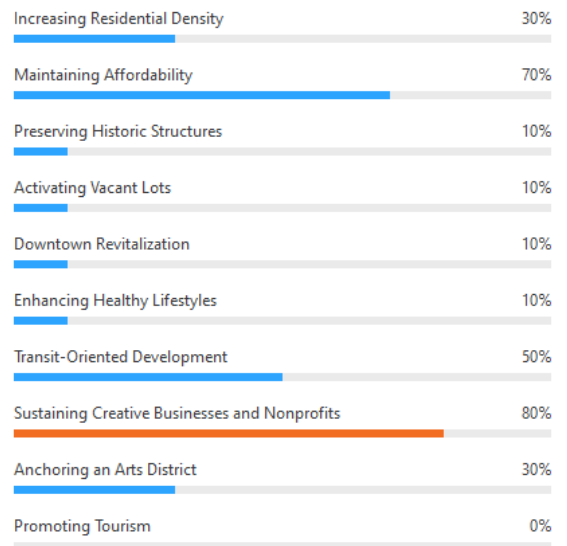
POLL LEADERSHIP FOCUS GROUP:

1. Please choose the top three goals which you believe fit best for Tampa. If you choose "other," please write it in the chat. (Multiple choice)



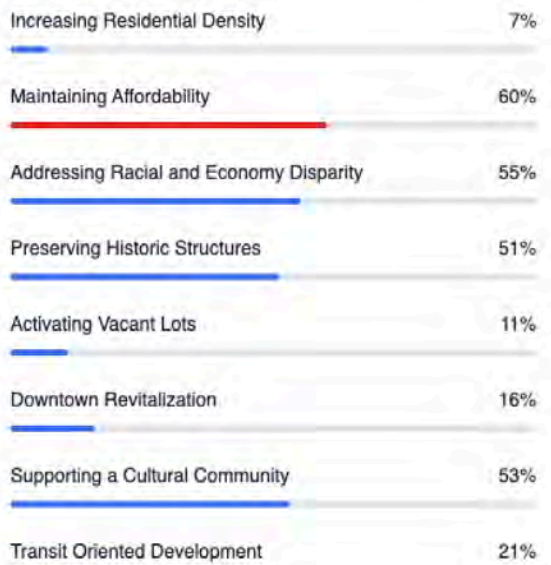
POLL FROM FUNDERS FOCUS GROUP:

1. Let us know the top 3 community goals that best align in Tampa. (Multiple choice)



POLL FROM THE PUBLIC MEETING

1. Please choose the top three goals that you believe align with other city/community goals in Tampa (Multiple Choice)



Local Leadership

Strong local leadership is essential for any community-driven arts project, especially one involving a non-local nonprofit developer. Without someone on the ground to open doors, advocate effectively for the project, and keep communication flowing, there is little chance of success.

The local leaders with whom Artspace works often include elected officials and city administrators who manage departments responsible for initiatives involving economic development, affordable housing, and public access to art. Other leaders can range from artists and nonprofit leaders to bankers and foundation heads, from business owners and real estate agents to developers or architects. In short, the local leaders who help make creative projects possible come from many walks of life. What they have in common is a willingness to work hard to make things happen.

Artspace invests time and effort at the very beginning of a proposed project to identify local leaders well-equipped – by position, experience, and influence – to serve as members of the Steering Committee. In the case of Tampa, Artspace national board member, Peter Lefferts, and Bob Miles, international keynote speaker and author, assembled the Steering Committee and the larger Core Group members to play that leadership role. Artspace met with members of these groups frequently over the course of the Preliminary Feasibility Study and encouraged all to attend the focus group sessions and the public meeting, as their schedules permitted. In this, we had nearly 100% participation in all sessions, a testament to their commitment and interest in this initiative.

We dedicated one of the three focus groups specifically to civic and community leaders. Acknowledging that all the focus groups were made up of Tampa leaders from many sectors, this focus group included perspectives from Hillsborough County, the City of Tampa, private business and industries, nonprofits, educational institutions, development and the community at large.

As is the objective for bringing together stakeholders with such broad and deep community experience, the conversation cracked the door open on the state of funding opportunities, community priorities, potential partnerships and how a project of this type might best serve the community, future residents and users of the spaces.

For example, among the group was Leroy Moore, head of the Tampa Housing Authority. Leroy talked about the importance of incorporating art in the Housing Authority's projects, as did Ernest Coney, with the Tampa Bay Community Development Corporation, a nonprofit developer of affordable housing. Both the Tampa Housing Authority and the Tampa Bay CDC had a lot to say about Low-Income Housing Tax Credits (LIHTC) and confirmed Artspace's experience of Florida being a very competitive state in which to secure an allocation of the most desirable type of Low-Income Housing Tax Credit (LIHTC) funding, the 9% credit. The LIHTC is a fundamental source of funding for a mixed-use affordable artist housing project (see more about funding, beginning on page 19). A key takeaway for us is that both organizations seem well suited to advise Artspace and potentially partner with Artspace in pursuing these tax credits and co-developing artist housing. While Artspace often acts as the sole developer on a project, it has successfully partnered with local housing authorities and community development corporations (CDC), and considers those partnerships a win-win for all parties.



Formal partnerships like these, as well as informal ones, can help projects address multiple community objectives. Local leaders are instrumental in bringing important opportunities to our attention and making meaningful introductions. From this focus group we heard passionate conversation about the need to bridge divides in a community that feels starkly segregated, and how the NAACP might play a role in helping to ensure that African American culture is

incorporated into the project. The idea of city investment in a project embracing equitable practices spurred cautious enthusiasm. Partnering with the Department of Veteran Affairs and specifically the Veteran Transitions Programs was suggested as a way to connect to and serve the veteran community and will be explored in the next phase. Workforce housing, we learned, is a priority for both the Tampa Bay Chamber and moving forward, the County Commission. Connections to both these influential, connected, and mission-aligned institutions are important to explore further.

The short but enthusiastic conversation with these civic and community leaders mirrored the energy and deep thinking that we experienced working with the Steering Committee and Core Group members from the beginning of the PFS. We are greatly encouraged by their caliber and commitment to community and this vision of new space.

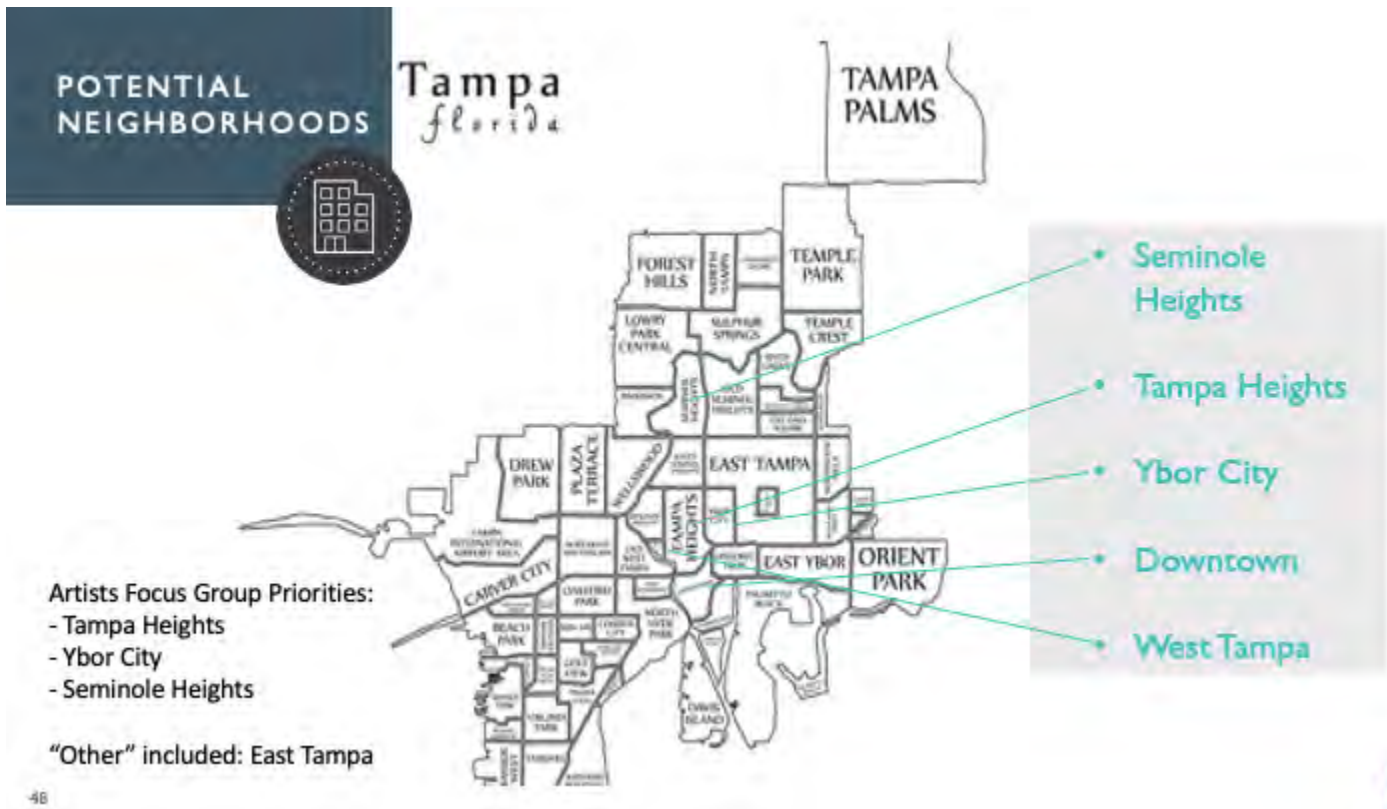
Potential Neighborhoods

More than anything else, Tampa is a city of neighborhoods with interesting histories and architecture, sweet cultural surprises, different ethnic accents, and a variety of catchy aromas, from food to cigars, that will lure you into a hundred little doorways. Each neighborhood has its own distinct personality and is very proud of it.

This early stage of study is the time to explore these neighborhood characteristics, assets, and challenges as they relate to a future mixed-use arts project. This work paves the way for a next, predevelopment phase of specific site identification and selection.

In preparing for our visit, we gave the Steering Committee a set of guidelines and asked them to identify the neighborhoods that might be most suitable for a mixed-use arts project. Considerations included such things as availability of land or buildings for reuse, a confluence of funding tools and identified areas for redevelopment investment, proximity to cultural assets and transportation, and opportunities to keep a cultural community safeguarded from rising costs. Based on these and other criteria, five primary neighborhoods were identified for further research in our study. They included:

Seminole Heights, Tampa Heights, Ybor City, Downtown and West Tampa.

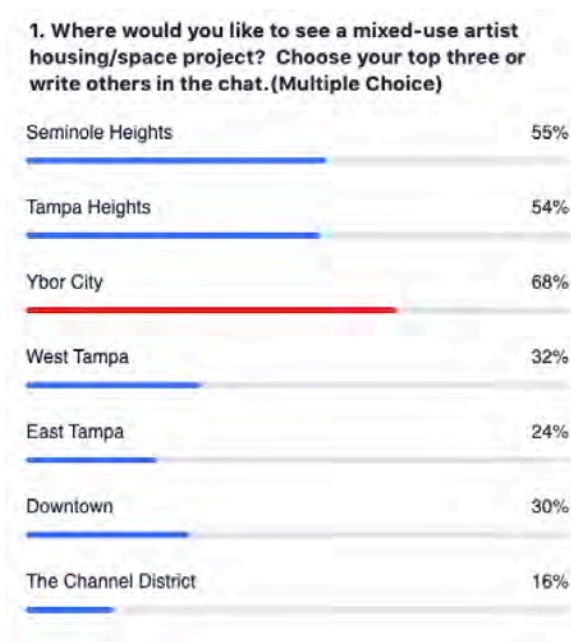


With the aid of local videographer Frank Rodriguez (Mighty Fine Design Co.) who created a virtual tour of four neighborhoods (Downtown, Seminole Heights, Ybor City, and Tampa Heights), an overview provided by Debbi Shaffer and the expertise of the Steering Committee, Core Group and others, Artspace familiarized itself with each of these areas enough to begin discussing neighborhood preferences with the 150+ participants of the focus groups and public meeting.

In these discussions, we drilled down further by asking participants to prioritize their top three neighborhoods for Artspace to investigate and discuss in this report. The priority neighborhoods selected by the most people were Ybor City, Tampa Heights and Seminole Heights. Of these, Ybor City garnered the greatest interest with three groups ranking it as number one. Tampa Heights was the top priority for the Artists and Creatives focus group. Seminole Heights gained a second-choice vote among the Artist and Creatives and a third among others. West Tampa was a close alternative to the top three. Downtown was not a top priority among any group. As noted in the Arts Market section of this report, the Artists and Creatives focus group participants offered other options not on the original list, including East Tampa, where many artists live due in great part to its relative affordability.

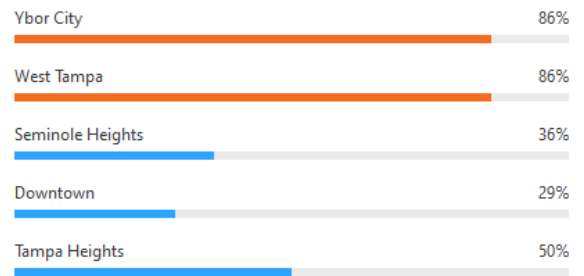
Based on the conversation, neighborhoods were promising to participants for any number of reasons including: artists want to be there; a project will advance or enhance current cultural assets or development activity; a project will preserve affordability in a potentially gentrifying area; or the project can solidify an area as an arts corridor.

PUBLIC MEETING PREFERENCE POLL:



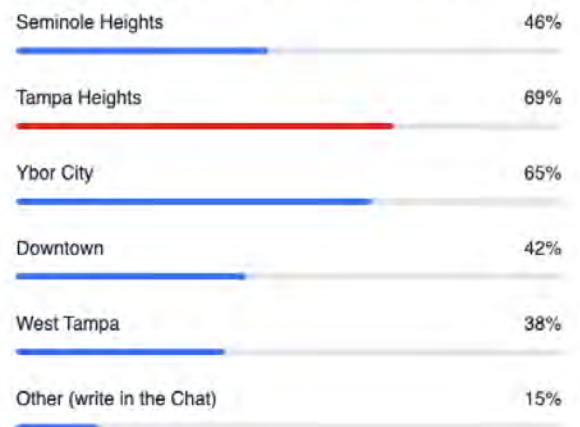
FUNDERS AND FINANCING NEIGHBORHOOD PREFERENCE POLL:

1. In which neighborhood(s) would you want a facility that supports creatives in Tampa? Pick top three. (Multiple choice)



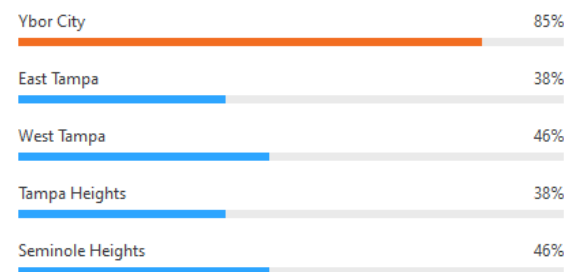
ARTIST AND CREATIVES NEIGHBORHOOD PREFERENCE POLL:

1. Let us know the top 3 neighborhoods where you believe artists want to be. (Multiple Choice)



CIVIC LEADERS NEIGHBORHOOD PREFERENCE POLL:

1. Please choose the three neighborhoods where you believe more affordable artist space would be best suited and supported. Please write in other thoughts you have in the chat. (Multiple choice)



As a nod to the earlier mention of Tampa's interesting history and wealth of distinct neighborhoods, it's notable that each of these top three neighborhoods is historically significant. Seminole Heights, Tampa Heights and West Tampa are all on the current National Register of Historic Places Districts and Ybor City is a National Historic Landmark District. Seminole Heights, Tampa Heights, and Ybor City are all included in The Local Historic Imagine 2040: Tampa Comprehensive Plan Vision, People, PLACES, Natural Spaces Governance, and Implementation: Future Land Use Districts. This alignment of city priorities for these neighborhoods is promising. Any future project in these locations will need to consider context to the built environment and sensitivity to history. It will be important to explore any relevant funding opportunities as well as any design or use restrictions imposed on new development.

Following is a summary of the characteristics of the neighborhoods as they relate to a future project concept and site selection process.

Seminole Heights is the oldest neighborhood in Tampa. It's known for its charming bungalow houses, tree-lined streets and now, breweries, restaurants, and Tampa's first street mural project. Artists have long occupied many of the small bungalows in the neighborhood because of their aesthetic charm coupled with affordability. Today, that affordability is harder to attain, like so many neighborhoods on the rise in value in Tampa. Tempus Projects was located here before moving to Ybor Heights in 2020. Its proximity to Ybor City was cited as an asset during the public meeting.



Crab Devil LLC campus, future site of Tempus Projects and The Peninsularium // Photo credit: Ian Foe



*"Gravy Rain" at Quaid in Seminole Heights
Photo Credit: Sam Newton*

Tampa Heights was developed in the 1880s from orange groves outside the city limits and was Tampa's first suburb. It was close to the city's port and financial hub, yet distant enough from marshy, low-lying areas that residents felt safe from the periodic outbreaks of yellow fever. Doctors, lawyers, and prominent business leaders built large, Queen Anne-style homes on bricks streets with granite curbstones. Today, Tampa Heights is one of Tampa's hottest neighborhoods and real estate markets.

Ybor City is the only neighborhood on Florida's west coast to be designated a National Historic Landmark District. It had the distinction of the Cigar Factory of the World until the middle of the 20th century and was largely occupied by residents of Cuban and Spanish descent. This neighborhood has enjoyed a rich and diverse culture for more than a century. Ybor's 7th Avenue, the main commercial thoroughfare, was recognized as one of the "10 Great Streets in America." As noted earlier, it is a twenty-minute walk to downtown. Additionally, there is a trolley line between downtown Tampa and Ybor City making it an accessible neighborhood in a city with public transportation challenges.



*Bleu Acier in Tampa Heights
Photo credit: Erika Greenberg Schneider*



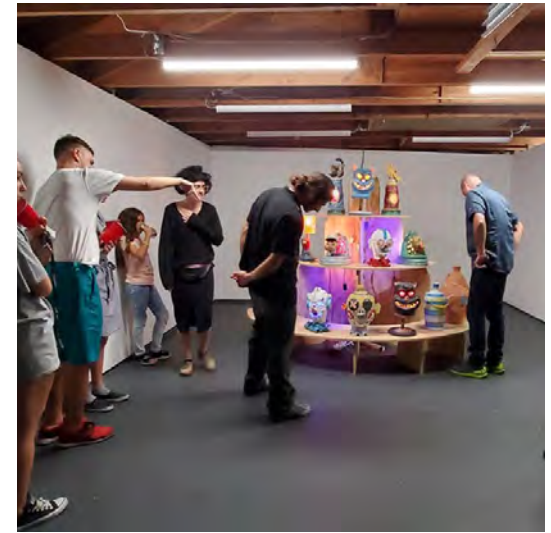
Architectural Rendering of Crab Devil's Peninsularium in Ybor Heights
 // Photo credit of Crab Devil and Wide Open Office



Hildebrando Belizzio's Exhibition "Disorden"
 // Photo Credit: Tempus Projects



Mural in West Tampa by Ilsol



"Embers of a Dying Fire" by John Byrd
 // Photo Credit: Sarah Howard

West Tampa is another older neighborhood in Tampa, annexed by the City in 1925. Dominated by African American and Latinx families, articles in the local press talk about West Tampa being the next area to explode with new development. It was praised for its diversity during the public meeting. Also known for its cigar factory buildings, until recently West Tampa was a sleepy area of the City.

Rapid change is afoot in **Downtown Tampa** where the largest downtown real estate development in the U.S. is underway. The \$3 billion, 56-acre Water Street Tampa redevelopment is a project that will substantially change the metro's core, connecting its central business district with the waterfront. While most artists don't see themselves downtown, primarily because of affordability and attraction to a less high-rise, funkier environment, and it did not rank highly among the four groups queried, it is important to note that this area of Tampa is receiving much attention and investment at this time.



"History in Motion" by Tony Krol & Michelle Sawyer (Illsol), Jay Giroux (Giroux Projects) with Keith Thomas and Matt Morgan (UPPERCASE, Inc), Projection by Molecular Media // Photo credit: Freddy Marshall

East Tampa gets a special mention as an area of the city where most families live below the poverty line but where properties and buildings are still affordable. Several artists in the focus group mentioned this as an area of growing interest among creatives, primarily because of its affordability. East Tampa is not on most people's radar but could be an up and coming area of redevelopment and reinvestment in the future.



*Moving Current Dance Collective
Photo Credit: Rachel Hennessy*

TAMPA 2040 COMPREHENSIVE PLAN GOALS FOR EACH NEIGHBORHOOD

All four neighborhoods fall within the Urban Village Land Use Guidance in the Tampa Center City Plan. The overarching goal of the Urban Village Designation is to “CREATE DISTINCTIVE AND MEMORABLE PLACES WITHIN THE CITY.”

One Interesting Land Use Policy that can promote creative activity is 5.1.8: “Facilitate consideration for the creative reuse of non-standard otherwise, undevelopable lots as a means to foster community interaction. Examples include: community gardens, neighborhood art displays and outdoor performance areas.”

Ybor City and Tampa Heights, and West Tampa are designated Community Reinvestment Areas (CRA) and are eligible to set up tax-increment financing districts to assist in the generation of funds that may be appropriated for a variety of infrastructure improvements and other needs of the CRA district as allowed by state statute.

Seminole Heights: The Seminole Heights Business District Strategic Plan as well as the Tampa 2040 plan also see Seminole Heights as an Urban Village. “Its proximity to the City center, coupled with limited commercial business diversity along the corridors, creates excellent redevelopment opportunities for neighborhood-serving uses and the evolution of improved activity nodes.” Density along these nodes would be a welcome addition.

Source: <http://www.planhillsborough.org/wp-content/uploads/2018/02/Adopted-Tampa-2040-Comp-Plan-1.pdf>

At this stage of exploration, any one of these areas offers opportunity for a future project(s). This is a strong position to lead from. With Tampa's active and robust real estate market and the turbulence of the current economic climate, we anticipate many nuanced changes over the coming months. These are just some of the reasons that the objective of this report is to identify opportunities broadly and to lay the groundwork for a future, in-depth, and specific site search process. It is also common for new neighborhoods along with specific sites to be added to the exploration list once the market size and space need has been quantified through the Arts Market Study. Inquiring about neighborhood preferences will also be important among a larger group of artists and creatives through the regionally disseminated survey in that next phase of feasibility work (see page 29 for more details).

Once the project has moved into a more formal predevelopment phase of study, the development team can begin honing in on specific areas and land/building opportunities. Its assessment will take a deeper dive, weighing many factors including: stakeholder preferences discovered here, funding opportunities and priorities of funders at that time, objectives of any project partners, and the ability of a site to help achieve other community goals, including addressing the economic and racial disparities so emphasized during our meetings.

One factor that can shift the future balance of options toward a particular neighborhood or site is cost. As a nonprofit developer of affordable artist housing and other space for creatives, Artspace cannot afford to pay a premium to acquire a project site. In Artspace's history, it is not uncommon for cities, counties and other governmental bodies to donate land or buildings for the purpose of creating long-term affordable space for the creative sector, an indication of the importance of this sector to the overall economy. It is also not assumed that a property would be donated.

All things considered, our key takeaway remains that there are ample neighborhoods to explore further, we are encouraged by the participation of stakeholders in the framing of each of these areas, and feel confident that there is a strong platform from which to move to the next phase.

Funding and Financing

An Artspace live/work project represents a significant investment of civic resources. While a number of federal programs, most notably Low-Income Housing Tax Credits (LIHTC), can be used to generate funds for construction, LIHTCs typically cover only 40% to 60% of construction costs. The rest must come from elsewhere.

Other locally allocated, national affordable housing programs, such as HOME funds, can help close the gap. We ask every community where we work to prioritize a portion of its affordable and workforce housing resources to the project. We also look to the community for predevelopment expenses – the “soft” costs, such as surveys and architects’ fees, that must be met before construction can begin.

During a Preliminary Feasibility Visit, we ask the Funders and Finance Focus Group to help us begin to identify potential public and private sources. Some of these, like LIHTC and HOME funds are long-established programs we know well; others, like Opportunity Zones, are less familiar to us. Still others are state, regional, or local programs such as transit-oriented development initiatives or economic development funds and these of course vary from one city to another. The Funders and Finance Focus Group invariably includes bankers and others who can educate us. The group also includes representatives from the philanthropic community, for it is to this sector that we turn for the final dollars needed to complete the project. Philanthropy comes in the form of gifts from foundations, corporations, and individuals.

Low-Income Housing Tax Credits

One of the most important funding tools in Artspace’s toolbox – we have used it in 47 of our 54 projects – is the federal Low-Income Housing Tax Credit (LIHTC) program. LIHTCs typically provide between 40% and 60% of the equity needed to develop an Artspace mixed-use project of 40 or more units. In Florida, LIHTCs are administered by the Florida Housing Finance Corporation (FHFC), an agency we know through our work developing the Sailboat Bend Artist Lofts in Ft. Lauderdale, where a \$13 million, 37-unit Artspace artist housing project was completed in 2007. LIHTCs come in two versions: 9% and 4%. The former are highly competitive, the latter are easier to obtain but generate less than half as much equity. Both types place limits on how much a developer can claim for site acquisition costs, and costs above that limit must be met through increased funding from other sources – another reason why high real estate prices are a deterrent to an Artspace project. There are no acquisition limits in 4% deals, however FHFC does review Maximum Project Costs.

To be eligible to reside in a LIHTC-funded project, an applicant must have an annual income of no greater than 60% of the Area Median Income (AMI). In Hillsborough County, the 2019 AMI for a family of four is \$69,200. That income translates to a maximum income limit of \$42,180 for a family of four to qualify for a 60% AMI unit with a maximum monthly rent of \$1,097 for a three-bedroom unit. Income and rent limits increase or decrease depending on household size and number of bedrooms. Note that some LIHTC projects observe income limits as low as 30% of AMI in some or all units. In Hillsborough County, that would mean an income limit of \$21,090 for a family of four and a maximum monthly rent of \$548 for a three-bedroom unit.

2019 Figures for Tampa-St. Petersburg-Clearwater, FL MSA

4-person AMI: \$69,200 (Source: novoco.com)

# OF BEDROOMS	MAX. RENT (30%-60% AMI)	HOUSEHOLD SIZE	INCOME MAX. (30%-60% AMI)
Efficiency	\$369 - \$739	1	\$14,790 - \$29,580
1	\$396 - \$792	2	\$16,890 - \$33,780
2	\$474 - \$949	3	\$18,990 - \$37,980
3	\$548 - \$1,097	4	\$21,090 - \$42,180

UNDERSTANDING LOW-INCOME HOUSING TAX CREDITS (LIHTC)

STEP 1 (OF 10)

The **low-income housing tax credit — LIHTC** — is the government's primary program for building affordable housing. **Here's how it works...**



STEP 2 (OF 10)

The **IRS** has a pool of tax credits that it divvies up every year among **58 state and local housing finance agencies**, based on population size.



STEP 3 (OF 10)

Let's say you're a **developer** and you want to build an apartment building with units designated for low-income people. To decrease rents, you'll need help to offset your costs. That's where those tax credits come in.



STEP 4 (OF 10)

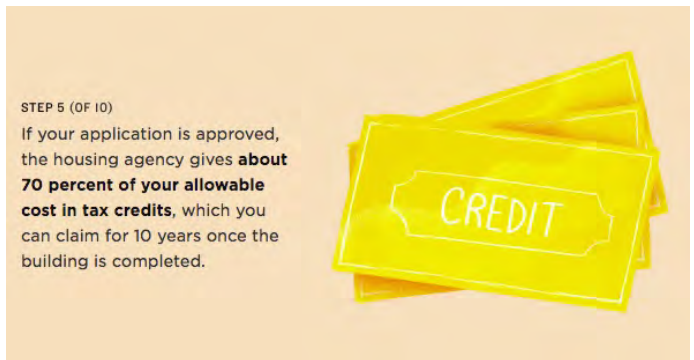
First, you go to your **housing finance agency** to request money to build. You promise to:

- Offer a certain amount of low-income units and keep it that way for at least 30 years.
- Meet the housing agency's requirements. For example, you might set aside units for veterans or the homeless.



STEP 5 (OF 10)

If your application is approved, the housing agency gives **about 70 percent of your allowable cost in tax credits**, which you can claim for 10 years once the building is completed.



STEP 6 (OF 10)

But tax credits are just a promise that you won't have to pay as much at tax time and are not very useful for buying concrete or labor.



STEP 7 (OF 10)

To solve that problem, you can sell your credits for cash to an **investor** — often, a big bank. Many developers use **syndicators** (who are like brokers) to help connect with investors.



STEP 8 (OF 10)

Everybody in this process earns a fee for their work.



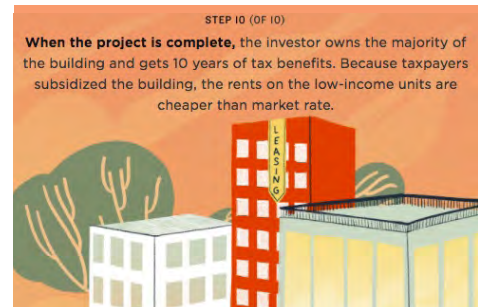
STEP 9 (OF 10)

Investing in LIHTC buildings helps banks meet their obligations under the Community Reinvestment Act, which requires banks to invest in the poorer communities where they do business.



STEP 10 (OF 10)

When the project is complete, the investor owns the majority of the building and gets 10 years of tax benefits. Because taxpayers subsidized the building, the rents on the low-income units are cheaper than market rate.



Source: NPR, Illustrations by Chelsea Beck/NPR. Explainer by Meg Anderson, Alicia Cypress, Alyson Hurt, Laura Sullivan and Ariel Zambelich/NPR and Emma Schwartz/Frontline

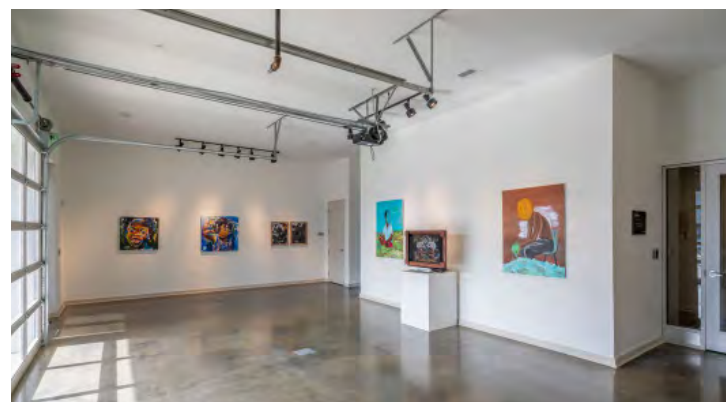
The LIHTC program requires developers to guarantee a minimum of 15 years of affordability, after which a project can be converted into a market-rate facility. Artspace, however, is a nonprofit developer committed to the long-term affordability of its projects and typically ensures affordability for a minimum of 30-50 years. This fact, coupled with our national track record, usually makes our LIHTC applications competitive.

It does not guarantee an award of tax credits, however, especially on a first application. In many states, Artspace has applied 2-3 times for the same project before receiving a 9% LIHTC award. A partnership with the Tampa Housing Authority or the Tampa Bay CDC could help ensure a more competitive LIHTC application as well as help each organization bring a new product type into the Tampa market. Even so, Artspace knows from our recent work in Sarasota that a 4% LIHTC Bond application may be more realistic but also come with a significant gap that would need to be filled with Housing Trust Fund, HOME, SAIL, and potentially TIF, as well as local philanthropic support.

It is also interesting to note that the Tampa Housing Authority (THA) works much differently than many housing authorities in large cities across the country. While THA has developed some projects itself, it is more typical to partner with for-profit developers who are doing larger, mixed-income housing projects. In year eight, THA steps in to become the sole proprietor of the LLC that was formed to develop and manage the affordable housing units.

EXAMPLE OF FINANCIAL STRUCTURE OF AN ARTSPACE PROJECT// MEMPHIS, TENNESSEE SOUTH MAIN ARTSPACE LOFTS

Source	Amount	Percent
PUBLIC SOURCES		
Low-Income Housing Tax Credits (4%)	\$6,414,169	33%
Tennessee State Historic Tax Credits	\$2,118,769	11%
City of Memphis HOME Loan	\$700,000	4%
Tennessee Housing Development Authority Housing Trust Fund	\$500,000	2%
Downtown Memphis Commission	\$200,000	1%
PRIVATE SOURCES		
First Mortgage	\$3,100,000	16%
Artspace Sponsor Loan (Philanthropic)	\$3,060,000	16%
Reinvested Developer Fee	\$2,800,000	14%
Deferred Developer Fee	\$615,485	3%
TOTAL	\$19,508,433	100%



South Main Artspace Lofts // Memphis, TN

ARTIST PREFERENCE IN AFFORDABLE HOUSING

Artspace live/work projects are unlike most affordable housing in that we use an “artist preference” policy to fill vacancies.

For each project, we appoint a committee that includes diverse artists who are not applying to live in that project. The committee interviews income-qualified applicants to determine their commitment to their chosen art form or creative pursuit. It does not pass judgment on the quality of an applicant’s work, nor is it permitted to define what is or is not art. Artists do not need to earn any of their income from their art form.

Although the IRS challenged the “artist preference” policy in 2007, it dropped the challenge after the Housing and Economic Recovery Act of 2008 became law. That law states: “A project does not fail to meet the general public use requirement solely because of occupancy restrictions or preferences that favor tenants...who are involved in artistic or literary activities.” This clause was threatened again in December 2017, but thanks to broad-reaching advocacy efforts, the final version of the Tax Cuts and Jobs Act retained the artist preference language.

Potential Funding Sources

During our Preliminary Feasibility Visit, we discussed the following potential funding sources with the Core Group and the Finance and Funders Group:

- **Low Income Housing Tax Credits (LIHTC)** – (See Pages 19-21) An example of a recent project funded by a 9% allocation of LIHTC is the Madison Highlands Apartments in the East Tampa neighborhood. This 102-unit project is a collaboration between the City of Tampa and Madison Highlands LLC. The sources of financing for this \$26 million project were:
 - \$22.8 million in LIHTC equity
 - \$625,000 in HOME funds
 - \$2.6 million private loans
- **Historic Preservation Tax Credits (HTC)** – A federal program administered by the National Park Service that provides funding for rehabilitation of historic structures. To be eligible, a property must be listed on the National Register of Historic Places either individually or as a contributing member of a designated historic district. In Tampa, our early conversations have led us to believe that a future Artspace project is more likely to be new construction. Many, if not all, of the historic cigar buildings which are a natural to consider and would make great conversion to artist space are privately owned with substantial acquisition costs.
- **Federal Home Loan Bank (FHLB)** – Any of 11 government-sponsored banks that provide equity to support housing financing and community investments. The Atlanta FHLB serves Florida through its regional member banks. In our experience, FHLB loans are generally between \$250,000 and \$500,000 per project. A local member bank assumes the role of project sponsor for funding applications. There are 13 FHLB-affiliated institutions in Tampa, including Bank of Tampa which was represented in our focus group.
- **Hillsborough County Housing Trust Fund** – In 2019, the Board of Hillsborough County Commissioners passed an ordinance to establish the Hillsborough County Affordable Housing Trust Fund with an annual commitment of a least \$10 million in county general funds in 2019 and 2020. These funds will promote the preservation and production of affordable housing in the County. The County hopes to be able to prioritize this funding for an annual allocation of \$10 million or more. *Note: More and more cities and counties across the country have built housing trust funds to fill the much-needed gap in financing that is typically needed in LIHTC projects. It's encouraging to see that the County is building such a fund. \$10 million is a drop in the bucket for a County of this size but nonetheless a meaningful start.*
- **The Sadowski Housing Coalition** has also had an enormous impact on successful statewide advocacy of affordable housing resources. The Coalition is a nonpartisan collection of 30 diverse statewide organizations that initially came together in 1991 to obtain a dedicated revenue source for Florida's affordable housing programs, now known as the Sadowski Act. The Coalition actively lobbies the legislature every year to preserve as much of what has been a \$700 million allocation intact and prioritized for affordable housing – the Sadowski Affordable Housing Fund. More typically, the fund has been in the \$200-300 million range after funds get re-prioritized for work related to natural disasters such as hurricanes and, this year, COVID relief.
- **New Markets Tax Credits (NMTC)** – A federal program that helps cities with economically distressed neighborhoods – again, typically but not always overlapping Qualified Census Tracts – attract private business capital by providing investors with credits they can use to lower their federal taxes for seven years. Artspace mixed-use projects rarely have commercial components large enough to make an NMTC application competitive, but if that were the case and the timing of funding availability worked out, we would revisit it.
- **HOME Program** – A federal program that provides funding to state and local governments to fund affordable housing developments. Any HOME funds for a potential qualifying project in Tampa could come from either the City or Hillsborough County or both, depending on the site. HOME funds are allocated to the City and County through HUD. In 2020, the City's allocation was \$1.7 million; Hillsborough County's allocation was \$2.7 million.

- **SHIP (State Housing Initiative Partnership) Funding** — Florida Housing administers the SHIP program which provides funds to local governments as an incentive to create partnerships that produce and preserve affordable homeownership and multifamily housing. The program was designed to serve very low-, low-, and moderate-income families. These are the funds that the Sadowski Housing Coalition was created to protect. They are a critical gap-filling and flexible low-interest, long-term (typically 15 years) source of funding for the development and preservation of affordable housing. *Update: The veto of the SHIP funding in the Fiscal Year 2020-21 budget means that all of those SHIP funds remain in the Local Government Housing Trust Fund. None of that money has been lost, but those funds will remain in the trust fund until the Florida Legislature takes action and appropriates it.*
- **SAIL** — The State Apartment Incentive Loan program (SAIL) provides low-interest loans on a competitive basis to affordable housing developers each year. This money often serves to bridge the gap between the development's primary financing and the total cost of the development.
- **Housing Resources for Veterans** — The City, County and Federal governments (through HUD) all provide a variety of resources for veterans, including vouchers for affordable housing units, along with other types of rental assistance. Florida has the third largest population of Veterans after California and Texas, making up 7.3% of the Tampa Bay population. Artspace has set aside housing specifically for veterans in its projects and 3% of its current artist residents nationally are veterans.
- **Tax Increment Financing (TIF)** — A tool available to local communities for assisting economic development, redevelopment, and housing. The incremental increases to property tax revenues can be captured and used to finance eligible activities on a site, including baseline environmental assessments, due care activities, and additional environmental response activities. TIF allocations are governed by the Community Redevelopment Agency in Florida, of which there are 220 across the State with eight in Tampa, more or less aligning with the neighborhoods mentioned in this report on page 14.
- **Community Development Block Grants (CDBG)** — CDBG funds may be used for a range of activities but all must benefit low- and moderate-income individuals or prevent or eliminate slums and blight. Like HOME funds, CDBG funds are also allocated by HUD and based on population. In 2020, that allocation was \$3.2 million to the City of Tampa and \$7.2 million to Hillsborough County. Both the City and County received significant additional CDBG funding through the CARES ACT (for COVID-19). Those additional allocations of CDBG funding were \$8.7 million to the City and nearly \$10 million for the County.

In addition to these formal sources of funding for mixed-use affordable housing projects, members of the Civic Leaders focus group also noted that the Tampa Bay Chamber and Hillsborough County both have an acute focus on affordable housing, particularly for people at or below 60% Area Median Income (AMI).

Relevant to consider as well is that Florida has no state income tax. Therefore state and local finances depend heavily on sales and real estate property taxes. This underscores the importance elected officials may place on advancing new taxable projects in the market as well as the impact of market fluctuations on local jurisdictions, including the current impact of COVID-19, as well as low interest rates that encourage new development and home building.

The information gathering during the Preliminary Feasibility Study and subsequent research and meetings reveals several good opportunities for predevelopment and capital funding of an affordable mixed-use artist

PHILANTHROPY IN TAMPA

In addition to public sources, philanthropy is an important tool for funding Artspace developments. This comes in the form of gifts from foundations, corporations, and, in some cases, individuals. Our experience with fundraising in Florida tells us that there is a lot of private support that comes from individuals and less that comes from long-established foundations. From our enthusiastic conversations with interested funding and financing stakeholders, we know there are many philanthropic entities who have generously supported the arts with the Straz and Stageworks being among the larger recent capital campaigns to test that interest. It is not known at this time if St. Petersburg-based philanthropists might support the right opportunity in Tampa, but this should be explored upon completion of the Arts Market Study, the next step in the feasibility process.

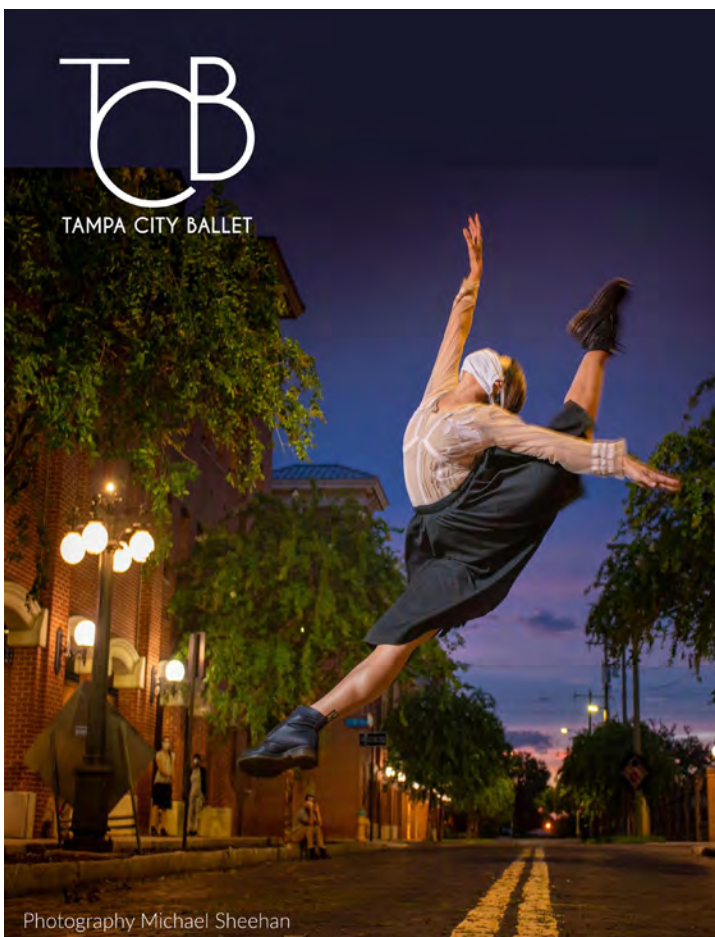
WHAT IS A COMMUNITY REDEVELOPMENT AGENCY?

The activities and programs offered within a Community Redevelopment Area are administered by the Community Redevelopment Agency. A five- to seven-member CRA “Board” created by the local government (city or county) directs the agency. The Board can be composed of local government officials and/or other individuals appointed by the local government. Although one local government may establish multiple CRA districts, there generally may be only one CRA Board. Each district must maintain separate trust funds and expend those funds only in that district.

WHAT IS A COMMUNITY REDEVELOPMENT PLAN?

The Community Redevelopment Agency is responsible for developing and implementing the Community Redevelopment Plan that addresses the unique needs of the targeted area. The plan includes the overall goals for redevelopment in the area, as well as the types of projects planned for the area.

Examples of traditional projects include: streetscapes and roadway improvements, building renovations, new building construction, flood control initiatives, water and sewer improvements, parking lots and garages, neighborhood parks, sidewalks, and street tree plantings. The plan can also include redevelopment incentives such as grants and loans for such things as façade improvements, sprinkler system upgrades, signs, and structural improvements. The redevelopment plan is a living document that can be updated to meet the changing needs within the Community Redevelopment Area; however, the boundaries of the area cannot be changed without starting the process from the beginning.



Photography Michael Sheehan

Photo courtesy of the Tampa City Ballet

live/work project in the City of Tampa. While no funding process is ever easy, there are sources and tools in the toolbox that support affordable housing for a priority project that is aligned with local goals.

Artspace's additional perspective is that Tampa has more public and private sources for the arts than what has been revealed in our work over the past two decades in Ft. Lauderdale, Sarasota, and Tallahassee.



*ACTUAL FORMS by Sue Havens at Coco Hunday
Photo credit: Jason Lazarus*

Arts Market

The term “arts market” refers to the demand for the kinds of space that creatives regularly need and use. We ask members of the Artists focus group, who have first-hand experience, what they consider “affordable” in terms of rent, what kinds of spaces are high priorities for them, and the neighborhoods where they would prefer new space be created. We also ask them to share their perceptions of the state of the creative community including existing cultural assets, where artists currently live and work, and both the challenges and opportunities they are facing. Together this information informs market feasibility and the Project Concept and lays the groundwork for an Arts Market Study, the next step on the path of an Artspace project.

A successful focus group with the creative sector relies on a diverse, locally active, and vocal group of artists willing to share their experiences with us. Tempus Projects pulled together an exemplary cross section of 34 creatives from the performing, visual, literary, administrative, and education sectors. The focus group members were diverse in age, race, and ethnicity, as well as the longevity of their connection to Tampa. They spoke from their own experiences as creatives in Tampa. The dialogue was rich and revealing.



*Tempus Projects in Seminole Heights
Sponsored in part by The Gobioff Foundation*

Artspace embraces a broad definition of who is an artist and what is considered an arts/cultural or creative organization/business. It is clear that the Tampa creative sector does as well. Residents of Artspace buildings elsewhere range from veterans to the formerly homeless, retirees, service workers, teachers, and parents – and they also happen to be creative. They are likely to earn a portion of their income from something other than their art. In fact, a look across the Arts Market Surveys that Artspace has completed in the past 20 years shows that only about 10% of artist respondents make 100% of their income through their art. In other words, many creative people also hold other jobs, some of which are not related to their creative pursuits. In fact, one artist stated that “it’s difficult to make a living in the arts here” and that “all the artists need to have a day job.”

WHO IS AN ARTIST?

Artspace defines an “artist” or “creative” simply as an individual with a demonstrable commitment to the arts or a creative pursuit. The term is intentionally broad and varies from community to community. In general, it includes:

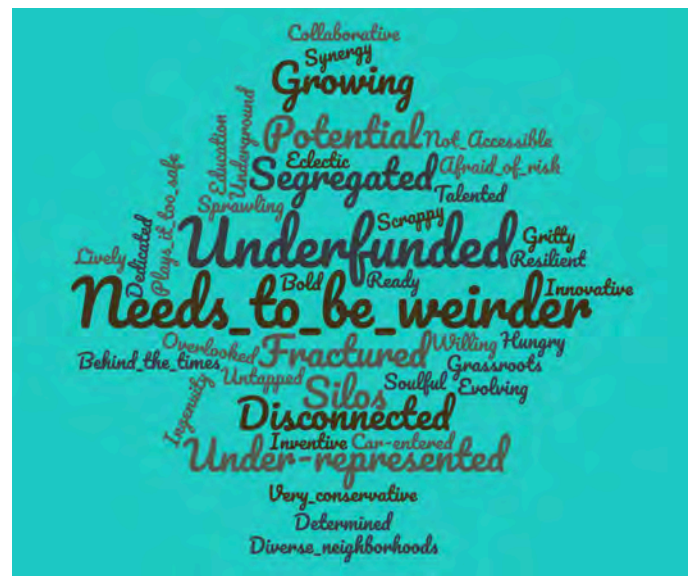
- A person who works in or is skilled in any of the fine arts, including but not limited to **painting, drawing, sculpture, book art, mixed media, and print-making.**
- A person who creates imaginative works of aesthetic value, including but not limited to **film, video, digital media works, literature, costume design, photography, architecture, and music composition.**
- A person who creates functional art, including but not limited to **jewelry, rugs, decorative fixtures, edible products, furniture, straw bale homes, pottery, toys, and quilts.**
- A performer, including but not limited to **singers, musicians, dancers, actors, and performance artists.**
- In all culturally significant practices, including a **designer, culture bearer, tattoo artist, culinary artist, craftsperson, teacher, or administrator**, a person who is dedicated to using their expertise within the community to support, promote, present, and/or teach and propagate their art form through events, activities, performances, and classes.

In Tampa, artists indicated that the depth and diversity of creative activity is an underrepresented asset that could be a leading economic driver and tourism brand to attract visitors and art collector locally and nationally. Stepping up support and enhancing visibility could help to retain and attract more artists to the community. Examples of the wide-ranging specific practices is evidenced by the focus group and public meeting participants themselves, most of whom wear multiple hats and practice in multiple disciplines including:

Dance/Choreography	Curation	Hip Hop	Theater
Murals	Printmaking	Education	Photography
Acting/Directing	Painting	Furniture Making	Tattoo/Body art
Music/Singing	Writing/Screenwriting	Arts Administration	Sculpture
Spoken Word	Multi-disciplinary	Social Practice	Installation
Craft cocktail	Fiber arts	Placemaking	Stage set design

Arts Community Profile

When asked to describe the arts community in Tampa we heard about the local depth of talent and its “gritty”, “innovative”, “lively”, and “resilient” nature. It was described as being as of yet, “untapped” but “ready” to have a stronger, collective presence in the city. Artists say they feel disconnected and that with no central gathering space or centralized creative hub, it’s harder to meet other artists, collaborate and to harness its own energy and increase collective visibility. Many noted a lack of funding and professional development opportunities, as well as audiences, collectors, and places to exhibit. These challenges, without a serious plan for supportive infrastructure, have driven some to neighboring St. Petersburg, where artists feel an arts city identity has been formally adopted as a growth strategy.



Word Cloud of words and phrases submitted during the Creatives Focus Group to describe the Tampa arts community

The cost and availability of space was also highlighted as a significant challenge. The force of gentrification has pushed artists from neighborhood to neighborhood. Many now reside in East Tampa where housing is more affordable, and, while attractive to creatives, was also described as barren and without amenities as compared to other more established neighborhoods that are recognized for their walkable, funky, and artistic vibe.

Creative Space Needs

We asked the artist participants about their creative space need priorities using a poll and then further explored the top three selections with the group. The need for affordable artist housing, described as live/work housing in the model of an Artspace project, polling at 83% was by far the most critical space need type identified. This is not surprising given the shared observation by one artist that there have been substantial increases in residential rents over the past seven years. Public Engagement/Community Space and Short-Term/Long-Term Creative Work Spaces tied for the second most important space types, polling at 67% each. The former underscores the desire for greater visibility of the arts community and the need for collaborative space.

Further discussion revealed more about what **affordable space** means to artists locally. Housing affordability, for example, was described as relative to an artist’s highly variable incomes, and a sliding scale was put forth as a solution. Current housing costs were said to be frequently more than \$1200/mo for a two-bedroom. Some artists rely on roommate situations to reduce costs to as low as \$450/mo. \$500/mo was shared as an ideal rent, but not more than \$900/mo to be financially feasible for others. Studio rentals on the other hand, need to be considerably

less expensive. Regardless of the total square footage, \$300 was shared as a cap with a low end of \$100 maximum. For those who shared a per square foot cost, \$1.00 or less per square foot was reasonable for one artist. Artspace finds nationally that artists are typically willing to consider rents between \$.50 and \$1.00/sf which is often well below market rate in growing urban areas.

The particular uses for Short-Term/Long-Term Work Space varied significantly, as would be expected with artists working in such different disciplines. Some artists require soundproof space for rehearsing or recording while others would like to access specialized use spaces and tools for woodworking, printmaking and other makers-specific disciplines. A specific need for industrial space was voiced and underscored by others. While there appears to be a lack of creative work space generally, industrial space typically used for larger scale works, manufacturing and production or methods involving heat or toxic materials, was stated to be completely unavailable in the city. Similarly, spaces for music rehearsal that don't violate noise ordinances are difficult to come by. On the other end of the spectrum, the literary and text-based arts were raised as often under-appreciated art forms where artists need space to work and come together, but where finding the right space is difficult. Co-working spaces in the area were deemed too expensive and library-spaces restrictive and not functionally appropriate.

1. Let us know the top three spaces that either you need or you know is needed in Tampa. (Multiple Choice)



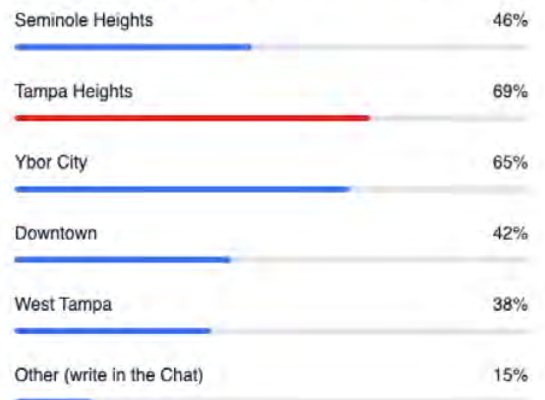
The terms of space use varied along with the types of uses. The preferences for studio/creative workspace included private space leased on a long term basis as well as space that could be available on an hourly rental basis (e.g. a dance rehearsal) or for short periods of exclusive use for up to four weeks during which time, for example, a performing arts production might be workshopped and mounted.

For all of the different types of uses of working space, consensus did emerge, primarily around *shared, collaborative, and flexible-use spaces for artists of various disciplines and spaces for sharing work with the public including sales, presentations and exhibitions.*

Creative Space Location Preferences

Time was spent exploring neighborhood options for new space, artist preferences, and why they feel as they do. A quick poll of participants revealed Tampa Heights as the top location for a new mixed-use creative space project. Its proximity to downtown and other areas was one reason given for the top preference. Ybor City, considered vibrant, but expensive, followed closely. One important detraction was that it could be for some too popular a late-night entertainment area. There was some discussion that areas immediately surrounding the historic district might be more residentially compatible. Finally, Seminole Heights was the third most popular option. The area is seen as having a growing arts identity and was appealing for its bikeability and central location.

1. Let us know the top 3 neighborhoods where you believe artists want to be. (Multiple Choice)



Not on the poll list but an area that came up in conversation as a location of interest was East Tampa. This neighborhood was described as more affordable, and therefore home to many artists. It was also described as neglected and offering little in terms of amenities, however these challenges seem to offer a sense of opportunity to the participants and a chance to address geographic racial and economic disparities.

Location considerations that are important to the artists, regardless of neighborhood included:

- Historic preservation and the reuse of a cigar factory building was seen as a plus.
- Locating on high ground or with easy evacuation access to prevent or mitigate frequent regional flooding issues.
- Accessibility to downtown and general centrality to other areas. This was raised as a factor among other groups as well due to a lack of public transportation infrastructure in Tampa. One artist reinforced that the availability of public transportation should be considered when selecting a location.
- Safety, particularly for evening programs and working late.
- Parking is a critical concern.
- Sensitivity to and respect for any neighborhood's existing residents and cultural community and identity. Avoid displacement and ensure inclusivity.



Historic Building, West Tampa



*Tampa Theatre // Photo courtesy of Tampa Magazine
Sponsored in part by the DeBartolo Family Foundation*

Key Takeaways

The need for a variety of affordable spaces is clear and housing tops the list for the evolving project concept. Artists are flexible in terms of location but did have clear preferences and offered some important considerations when comparing opportunities. Critical above all is affordability.

Some additional takeaways that offer more context and suggest topics for continued discovery during predevelopment include:

- Artists echoed the passionate view expressed in other focus groups that Tampa still struggles to overcome the impact of racial segregation. This project is seen as an opportunity to be a model for equitable and inclusive development that can bridge some geographic and socio-economic divides.
- Artists are longing for spaces to connect with others and to raise the visibility of the creative sector among civic leaders, residents, and visitors.
- The local art scene is seen as underinvested and underleveraged and as such, Tampa is missing a significant branding and economic opportunity, and is losing artists and arts organizations and programs to other communities.
- Creative spaces have come and gone over the years and rising costs are seen as the biggest destabilizing factor. A new mixed-use project could offer one solution to this challenge.
- There are arts organizations and institutions that could be approached about non-residential space in a new mixed-use project. In particular, Graphic Studio at the University of South Florida is seeking new space.

The Next Step: Artspace's Arts Market Study

The information gathered during this Preliminary Feasibility phase is critical to developing a project concept to test further. Based on the feedback from artists we can begin to imagine an affordable artists live/work project with a mix of non-residential space uses that could include private and shared studio/creative work spaces and shared spaces for collaboration, exhibition, presentation, and other public events and gatherings. The Art Market Study (AMS) phase of work tests these well-informed assumptions through input from a large pool of regional artists, creatives, makers, and culture bearers.

The AMS tool was developed by Artspace to quantify the need for affordable live/work, studio, and other kinds of space in a given community. Its major component is an online survey containing questions about the kinds of space artists want, how much they can afford to pay, and related matters. The data collected helps determine the project's ideal size, refine the project concept, influence site selection, and guide future creative space development.

The information provided by an Arts Market Study can also be used by other developers, building owners, entrepreneurs and organizations that might wish to carve out space for artists in their buildings and planned projects. This is important, because not every type of needed space can be accommodated in a single facility. By making AMS information available to other interested parties, Artspace supports new creative space opportunities and helps a community grow its arts infrastructure.

Project Concept

The hopes, concerns, and ideas expressed during a Preliminary Feasibility Visit are the raw materials that go into the making of a project concept. The needs of the community — such as affordable housing, downtown revitalization, historic preservation, and others — go into it, too. So do the observations we make during our virtual site tour and conversations around existing physical space assets and infrastructure challenges within the creative sector. In a sense, the project concept is the outcome of everything we learn during the course of a Preliminary Feasibility Visit. When we combine that with the data from an Arts Market Study — the next step in the process — we obtain a strong indication of interest and need.

In Tampa, we heard repeatedly that affordable space is increasingly difficult for artists to find and that the arts are underappreciated and financially undernourished despite the presence of significant philanthropy invested in the larger cultural institutions like the Straz or Stageworks. We heard a lot, too, about the need to build stronger bridges — between arts organizations, between artists and the greater community, and above all between Black and white.

In our view, the project concept that makes the most sense for the community would be a mixed-use development — that is, a multi-story building which combines affordable live/work housing on the upper floors with commercial space on the ground floor. By “commercial” we simply mean non-residential and can include private studio space and spaces for creative sector and community-serving nonprofits or locally owned businesses. Artspace mixed-use projects around the country have stores, art galleries, art studios, offices, coffee shops, restaurants, meeting rooms, rehearsal studios, performance venues, and many other facilities on the ground floor.

While we are not yet close to having a preferred neighborhood or site, Artspace believes a project in any of the Tampa neighborhoods preferred by focus group participants in this study (Ybor City, Tampa

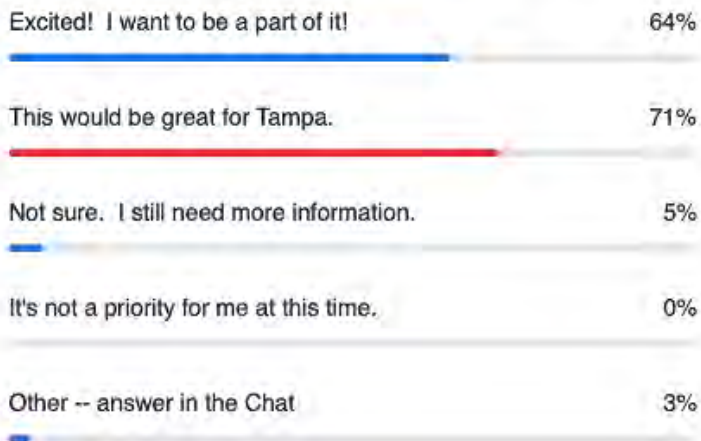


*Gasparilla Festival of the Arts // Photo Credit: Visit Tampa Bay
Sponsored in part by Raymond James*

Heights, Seminole Heights or West Tampa) would have great community impact. Much will depend on the successful identification of a site that can be acquired at a reasonable cost.

The importance of creating a place where people from a variety of cultures and backgrounds feel comfortable cannot be overstated, a topic that came up on several occasions. The diversity of the artists and creatives who attended the Artists/Creatives Focus Group was a powerful demonstration of what the arts can achieve in that respect.

**1. What do you think about this proposed project?
Check all that apply. (Multiple Choice)**



The other essential piece of the project concept, we believe, is that an Artspace project in Tampa needs to make a significant contribution to the economic revitalization of its neighborhood without displacing existing organizations or families. Whether that neighborhood is Seminole Heights, Tampa Heights, Ybor City, West Tampa, or another, we will look for a site where an Artspace project can function as an agent of positive, healthy change.

If a mixed-use project cannot be built because of cost or site considerations, a second scenario would be a live/work project without commercial space. Although all-residential projects do not often generate the traffic of mixed-use projects, they are strong contributors to their communities. That said, Artspace would strongly prefer to find a site large enough and adequate funding sources to pursue a project that has a strong mixture of uses for artists of all ages, family sizes, and space-type needs.



Artists Jenn Ryann Miller & Gary Schmitt with guests in their studio at East Wild // Photo Credit: Sarah Howard

FEEDBACK FROM COMMUNITY MEMBERS

“It made me so proud to live here,” one Core Group member said. “I really had no idea what I was getting into,” he added, when he agreed to serve on the committee. “It’s been wonderful.”

“..we need spaces where all races and cultures feel welcome, heard, and represented”

“I think the more community engagement the better!”

“Thank y’all for all this information and for bringing this rad project to Tampa!”

“This was an amazing session. Thanks!”

“Great project! I hope it takes off! Would love to see it come to fruition and be involved!”



Takeo Faison at HCC // Photo Credit: Pedro Castellano

RECOMMENDATIONS AND NEXT STEPS

Tampa is a study in contrasts. In some respects, it resembles a much smaller city with two degrees of separation connecting people together; yet it has many big city opportunities and challenges, including a dearth of affordable housing and inadequate public transportation, two issues that the City and County are very hard at work to remedy. Tampa is home to several major, top-ranked educational institutions, the University of South Florida and the University of Tampa, both with Colleges of the Arts yet its public K-12 schools (7th largest school system in the U.S.) are in crisis with severe budget woes and huge disparities between white and non-white students. Its thriving River Arts District is a wonderful asset but also one that has caused some displacement. It has state-of-the-art mainstream cultural institutions representing all the major traditional European art forms – ballet, classical music, opera, theater, visual arts – yet many of its residents do not see themselves represented.

While an Artspace project is not the answer to every urban problem, it can help a community address some issues effectively. A mixed-use project of the kind we think makes the most sense for Tampa can provide needed affordable housing, affordable studio space for artists and space for arts activities, including performances and education. It can also provide non-residential space for artists, arts organizations, and/or creative businesses such as galleries, coffee houses, and restaurants. It will encourage arts activity and be mindful and intentional about including diverse voices wherever it is built. Depending on its location, it may also provide much needed space for smaller creative businesses and cultural organizations, help revive a struggling neighborhood, bring back affordability to a rapidly gentrifying neighborhood – the list of possibilities is long. As an elected official remarked in an Artspace focus group last year, “One of the greatest generators of oxygen in our state is the arts.” Artspace believes this to be a universal truth.

Artspace strongly recommends moving forward with steps toward a project in Tampa. We understand many of the challenges with obtaining the preferred allocation of 9% Low-Income Housing Tax Credits and believe Tampa may have the donor base and interest to help fill the much needed gap in a mixed-use artist housing project if funded using the 4% LIHTC program. We believe there will be an excellent market for a mixed-use artist housing project and that it would be a huge boon in providing hope and a sense of progress that benefits residents from all walks of life. An Arts Market Study will help quantify the market and answer many related questions about the space needs and preferences of the artists of Tampa.



Tampa Museum of Art // Photo courtesy of the Tampa Museum of Art

Next Steps

Now that the Preliminary Feasibility Study has been completed, and assuming that Tampa's leaders want to pursue an Artspace project, the principal next steps are these:

- **Prepare for an Arts Market Study.** Coordinate with Artspace to confirm the scope of work and discuss timeline. Gather a diverse group of leaders – often this is a version or subset of the Steering Committee or Core Group – to serve as an advisory committee to the survey process. This committee is critical to the Arts Market Study and can be reengaged for future activities related to the project such as advocacy and marketing. The survey will be available to interested artists and creatives for six weeks with results soon thereafter. Those results will offer local leaders and Artspace data helpful in shaping the project concept and moving a vision forward.

- **Continue to explore private and public sector funding opportunities and how they might be pursued.** Identify new resources to support future creative space and ongoing program initiatives as well as explore potential partnerships.
- **Engage the city and county governments more deeply.** With a few important exceptions, elected and administrative officials of Tampa took a “wait and see” position with respect to our Preliminary Feasibility Study. That said, City staff from economic development and housing attended focus groups and Councilmember Bill Carlson met with Artspace several times in planning for this study. We thank them all for their involvement but note that more will be required for an Artspace project to move forward in Tampa. Obtaining the active support of city government will be a vital early step in the process, and we will need the help of allies on the ground.
- **Expand the site search.** As stated elsewhere in this report, our virtual visit to Tampa did not produce a clear favorite neighborhood or area for an Artspace project. Instead, each of the four neighborhoods we virtually visited present opportunities to be explored in more depth once the market demand from the Arts Market Survey is understood in more detail.
- **Engage the public.** Artspace views its projects as community assets, and as such we want to know what the public is thinking, not merely when the project is in the conceptual stages but throughout the process. We look to the Steering Committee to keep the public informed and engaged – and to let us know how we’re doing.

After completing the Arts Market Study, the next step toward an Artspace project involves entering into a predevelopment agreement.



*Master Printer, and owner of Bleu Acier,
Erika Greenberg-Schneider
Photo Credit: Kathleen Flynn*



Musician Ned Pope // Photo Credit: Artist @neiledwardmusic Instagram